



Bulgaria – Turkey IPA Cross-border Cooperation Programme  
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# Preparation of Bulgaria – Turkey IPA Cross-border Cooperation Programme 2014 – 2020

*Baseline analysis & SWOT analysis*



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## GLOSSARY OF ACRONYMS

<b>BG</b>	Bulgaria
<b>CA</b>	Contracting Authority
<b>CBC</b>	Cross-border Cooperation
<b>CSF</b>	Common Strategic Framework
<b>DG</b>	Directorate General
<b>ERDF</b>	European Regional Development Fund
<b>ETC</b>	European Territorial Cooperation
<b>EU</b>	European Union
<b>EU COM</b>	European Commission
<b>EU2020</b>	Strategy “Europe 2020”
<b>ICT</b>	Information and Communication Technologies
<b>IPA</b>	Instrument for Pre-accession Assistance
<b>JTS</b>	Joint Technical Secretariat
<b>JWG</b>	Joint Working Group
<b>MA</b>	Managing Authority
<b>MRD</b>	Ministry of Regional Development
<b>MS</b>	Member State (EU)
<b>NA</b>	National Authority
<b>NUTS</b>	Nomenclature des unités territoriales statistiques
<b>RCF</b>	Regional Consultation Forum
<b>SEA</b>	Strategic Environmental Assessment
<b>SME</b>	Small and Medium Enterprises
<b>TA</b>	Technical Assistance
<b>ToR</b>	Terms of Reference
<b>TP</b>	Thematic Priority
<b>TR</b>	Turkey



## I. Baseline analysis

The cross-border area of the Bulgaria-Turkey IPA CBC Programme 2014-2020 is located in South-Eastern Europe, at the south-eastern part of the Balkan Peninsula and includes the districts (equivalent to NUTS-3) Burgas, Yambol and Haskovo in Republic of Bulgaria and the provinces Edirne and Kırklareli in the Republic of Turkey. The territory has an extent of about 29.000 km<sup>2</sup> and the common border of both countries stretches along 288 km (including three operating border crossings) and has a total population of 1,5 Million inhabitants (784.480 inhabitants on the Bulgarian eligible programming area and 742.000 inhabitants on the Turkish eligible programming area; cf. National Statistical Institute Bulgaria, 2014h: online; Turkish Statistical Institute, 2014b: online).

The eligible area in Bulgaria represents 14.99 % of the total territory of the country respectively the eligible area in Turkey represents 1.58 % of total country territory. Main cities of the region are Burgas (211.535 inhabitants), Yambol (72.778) and Haskovo (92.788) in Bulgaria and Edirne (148.474) and Kırklareli (61.880) in Turkey (cf. Bulgarian National Statistical Institute, Census 2011; State Institute of Statistics, Republic of Turkey, 2014: online). Generally, the CBC region shows a very low population density of 54,9 inhabitants/km<sup>2</sup> in Burgas, 45,3 inhabitants/km<sup>2</sup> in Haskovo and 39,7 inhabitants/km<sup>2</sup> in Yambol (cf. EUROSTAT, 2011: online). Edirne has a population density of 64,7 inhabitants/km<sup>2</sup>, Kırklareli of 53 inhabitants/km<sup>2</sup>.

### Geographical characteristics

The geographical structure of the co-operation area alternates from altitude 710 m to 1000 m and includes plains, low altitude valleys, plateaus and hilly areas, with some mountain features. In the North-West the area borders to the Eastern Rhodopi Mountains and to the low branches of the Sakar Mountain in Bulgaria, and on the South-west to the Aegean Sea (Saros Gulf) in Turkey. In the North-East the co-operation area borders to the Balkan Range in Bulgaria, and in the South-East to Strandja/Yildiz Mountain and Black Sea littoral presented both in Bulgaria and in Turkey.

The water reserves of CBC area comprise both surface and ground waters. Maritsa/Meric River is the biggest river on the Balkan Peninsula. Tundja/Tunca River is another important one in the region. The region of Strandja/Yildiz Mountain is the richest on water resources in the entire Thracian – Strandja/Yildiz area.

Five rivers take their sources from the Strandja/Yildiz Mountain. The largest of them are Ropotamo, Dyavolska and Veleka/Değirmendere. Also the surface waters are presented by several big lakes situated on the Bulgarian side. The ground water resources consist of mineral springs and thermal waters. Joint influence of the Black Sea and Aegean Sea; Strandja, Sakar, Balkan Range and Eastern Rhodopes Mountains as well as Maritza and Tundja/Tunca Rivers set the patterns of the climate over the cooperation area.

The climate varies from transitional-continental to continental-Mediterranean (mild winters, hot summers). The mountains are generally forested with deciduous trees and some evergreen. Different types of mineral resources are presented in the co-operation area. There are non-metal deposits (limestone, marble, gabbro, granite, asbestos and argil), metal deposits (polymetallic ore - mainly lead, zinc, and silver) and brown coal deposits on the Bulgarian side. On the Turkish side there are deposits of coal, chrome, iron, copper, bauxite, marble and sulphur. There are considerable sources of sea-salt in the Black Sea coastal areas of the cooperation area.



## Employment, labour mobility and social and cultural inclusion

Regarding the transformation of labour markets it is noticeable, that especially Turkish regions belong to the most vulnerable regions in Europe, and also part of the Bulgarian regions are classified as vulnerable ones (Haskovo and Yambol). The situation in the field of unemployment is quite similar. Here the Turkish regions of the cross-border area are identified as very vulnerable regions, Haskovo and Yambol regions from Bulgarian side are also classified as vulnerable ones.

Especially the situation for young employees illustrates a threat for the future development of the area, due to the hindrance of the youth employees entering the labour market. These current developments contain the risk of young people losing their “qualifications attained by not participating in further training and furthermore lacking social security rights, since they have not yet contributed to the social system” (OIR et al., 2011: 102). Generally, “the highest rates of youth unemployment [...] can be found on the Balkan Peninsula [...]. The main reason for this is a demographic development with very high reproduction rates, that leads to a decoupling of young people trying to enter the labour market and the real economic and labour market growth” (OIR et al., 2011: 103).

Unemployment is a major issue for the CBC region, in all participating regions the unemployment rate has rising during the last years. The unemployment rate of Burgas District fell from 4,1% in 2007 to 3,9% in 2009 and rose then to 12,4% in the year 2011. In 2012 the unemployment rate was 11,5% (cf. National Statistics Institute, 2014a: online). In Yambol and Haskovo Districts, the unemployment rates are even higher, rising to 14,9% in 2012. Both districts started from a higher level in the year 2007 (7,2% in Yambol, 9,2% in Haskovo) (cf. National Statistics Institute, 2014b,c: online). The unemployment rate of Edirne of 5,9% in 2011 rose to 7,5% in the year 2012. In Kırklareli the rate of 8,4% in 2011 slightly recovered to 7,9% in the year 2012. In comparison, the general unemployment rate for Turkey was 9,8% in 2011 resp. 9,2% in 2012 (cf. Turkish Statistical Institute, 2012a). Taking into account the labour force participation rate in the year 2011 shows for Edirne and Kırklareli that the participation rate ranges around 55% (56,2% in Edirne and 54% in Kırklareli, cf. Turkish Statistical Institute, 2012a).

It becomes visible, that both sides of the border depict a similar socio-economic development in the last few years. In relation to the situation of unemployment, generally the rates for youth unemployment are at a very high level, including the threat of brain drain occurrences in the region (cf. above).

### *Specific focus: Demographic development*

Especially in Bulgaria, the total population shrank strongly between 2005 and 2012. For example the total population of the Bulgarian regions of the programming area has decreased from 830.917 inhabitants in 2005 to 784.480 inhabitants in the year 2012 (cf. Bulgaria-Turkey IPA CBC Programme 2007-2013, 2011: 10; Bulgarian National Statistical Institute, District Statistics, 2012: online).

Over the period 2001-2011, the population of Haskovo District has decreased by nearly 11%. The decline in population is due to the persistent processes forming the rate of natural increase that is negative, while net emigration became a problem only in the last few years. The age dependency ratio is higher than the country average, with the population aged over 65 being 50% more than the population aged 14 years or younger. The working age population (15-64 years) was nearly three times the population aged over 65 years that is close to the national average.

Over the period 2001 - 2011, the population of the Yambol District has decreased by over 15%, a significant percentage compared to the country average. The district is characterised by high negative levels of both natural increase and net migration. The age dependency ratio ranks above the national average. The population aged over 65 years is 50% more than the population aged below 14. In 2011, the population of working age (15-64) was nearly three times the population aged over 65 years.



The population of Burgas has decreased only slightly over the past 12 years: 1,8% for the period 2001-2011. It is one of the few districts in the country where the number of people who have relocated from elsewhere is larger than the number of those who left over the last ten years. It could be explained by the economic crisis and the declining employment prospects for the rural population. In 2011, the district had the second lowest age dependency ratio, calculated as the ratio of people over 65 and children under 14 years. Accordingly, the dependency ratio (population over 65 to the working-age population) is well below the country average.

The Turkish part of the CBC programme area shows positive developments in terms of the population growth in comparison the total population in Turkey. In both Turkish provinces participating in the CBC Programme the population is expected to increase until 2023 as well. (cf. Turkish Statistical Institute, 2013a).

Demographically, the population of the eligible Bulgarian regions also display a higher ageing index than the national average (cf. Bulgarian National Statistical Institute, Census 2011). The mean age of the population on the Bulgarian part of the eligible area shows higher values than for the Turkish part of the programme area. Focussing especially on the provinces of Edirne and Kırklareli shows that especially Edirne displays a quite low median age of 31,8 years for females and 29,7 years for males (data from 2012). Until 2023 the mean age is expected to rise to 33,7 years for females and 31,9 years for males (cf. Turkish Statistical Institute, 2013a).

The life expectancy at birth for the whole CBC area is quite high and generally corresponds to the respective national average. The life expectancy in the CBC region is up to 76,6 years. Generally, the region can be classified as a prepared region towards the issue of an ageing population. The region therefore performs better than one of the northern Bulgarian regions (vulnerable regions) but on the Turkish side the area around Istanbul performs better and is therefore classified as a low impact region concerning ageing.

### *Challenges*

- The acceleration of demographic change (including ageing and the decrease of population) constitutes a long-term challenge intensifying further and having major economic, social and territorial implications on the CBC region.
- Increasing levels of poverty, low income and social exclusion illustrate major challenges, which may further focus especially on rural and peripheral areas – which already being characterised by negative transformation processes – due to the increasing concentration of economic activities on main cities and urban hubs.
- Negative Migration – constitutes a major challenge for those parts of the CBC region, which are already affected by negative population developments (shrinking of total population, ageing of population).
- The needs of regional labour markets are often not met by the available workforce, i.e. missing qualifications, etc.; labour market supply and labour market demand are therefore not corresponding. This results in an additional increase of the already high level of unemployment.
- The situation of a declining economy and rising unemployment cannot be balanced by growing sectors, like industry and service; on contrary, the situation is further intensified through a limited rate of job creation rate and a partly low labour force participation rate.

### *Needs:*

- There exists the regional need to make full use of the existing labour potential and to enhance labour force participation in order to face diverse challenges including ageing, brain drain occurrences and rising global competition.
- The skills of the labour force need to meet the needs of the labour market, including sufficient qualifications such as IT and foreign language skills to improve the general competitiveness of the private sector.





- There exists the urgent need to fight poverty and minimise social exclusion; both challenges are currently further intensified by rising unemployment levels and a generally low adaptability of the labour force to changing conditions, therefore more and better employment opportunities need to be developed and implemented.

## Environment, climate change adaptation and mitigation & risk prevention and management

Taking a look at different environmental media, such as air, water and soil shows, that the air conditions in the region are quite good, with the “main reasons for air pollution are emissions of fuel used in industry and for households heating and exhaust gases of vehicles” (Bulgaria-Turkey IPA CBC Programme 2007-2013, 2011: 19).

The same situation is visible in the field of surface water, main reason for polluted water is the lack of sewerage systems in the majority of smaller municipalities. For ground water, there is pollution with phosphates or nitrates (cf. Bulgaria-Turkey IPA CBC Programme 2007-2013, 2011: 19). In Haskovo and Jambol districts nearly 70% of the population live in areas with public sewerage systems, that is close to the national average, whereas in Burgas region almost the total population live in areas with public sewerage systems (cf. Regional Profiles, 2014: online).

In the Turkish provinces Edirne and Kırklareli 100% of the population is served by water supply networks (2010). The rate of population served by drinking water treatment plant amounts 41% in Edirne and 24% in Kırklareli. This is also mirrored in the actual investments in water supply facilities, whereas the province of Kırklareli shows a quite higher expenditure (more than 210.000 TL) than the province of Edirne, which resembles the need for improvement in Kırklareli (about 6.000 TL) (cf. Turkish Statistical Institute, 2010).

In the field of soil, erosion is a main issue for the region, where especially larger areas in Kırklareli are affected (cf. Bulgaria-Turkey IPA CBC Programme 2007-2013, 2011: 19).

Both countries have a tradition in the preservation and management of nature. The issue of the maintenance of biodiversity is an important topic in the area and a range of regional best-practice examples is already available (Bulgaria-Turkey IPA CBC Programme 2007-2013: 20). The region also hosts a number of nature parks and protected areas, such as the Strandja Nature Park in Bulgaria and the Gala Lake National Park in Turkey (Edirne). Additionally, the two areas Kasatura Korfezi Nature Reserve (Kırklareli) and Saka Lake Nature Reserve (Kırklareli) are located in the province of Kırklareli (cf. Strandja, 2014: online; Republic of Turkey, Ministry of Culture and Tourism, 2014a/b: online).

Taking into account the environmental situation, some differences between the two neighbouring countries may be identified. Especially for the topics of health and heat waves different results for the area become evident. Northern parts of Bulgaria and the Turkish regions being engaged in CBC, are classified as vulnerable regions whereas the eastern eligible Bulgarian regions are categorised as most vulnerable ones. Generally, the whole cross-border area is rated as region with deficits to adapt to climate change. The cluster to which the cross-border area belongs is “characterized by general below average performances in adaptive capacities, once again reflecting the lag in their national economies compared to the EU average” (OIR et al., 2011: 71).

One main environmental issue includes the Black Sea, which is one of the main connection factors of the CBC region (both Burgas and Kırklareli are connected to the Sea). The Black Sea is habitat for 168 fish types, four different marine mammals and thousand of plants.

Generally, the Black Sea faces numerous problems and threats such as the decrease of biological resources, declining diversity of species as well as the reduction of aesthetic values of the sea (cf. Commission on the Protection of the Black Sea Against Pollution, 2013: online). Reasons for these developments are pollution,





irresponsible fishing in the sea as well as eutrophication. Taking into account, for example the total amount of loaded and unloaded goods in the NUTS 2 regions Yugoiztochen (BG) and Tekirdag, Edirne, Kırklareli (TR), shows an excessive increase in Turkey between 2010 and 2011 (2010: 4.576 thousand tonnes to 16.093 thousand tonnes). Due to the efforts of the last years, improvements are already visible, although these are “still in the early stages, [and] are unstable and still far from the strategic target: that is to bring the conditions of the environment back to those that were observed in the 1960s” (Black Sea Commission, 2013: online). Therefore, the BSEC especially points out, that “elaborate work needs to be done in this sphere individually and collectively by the Member States and with the support/involvement, when and where needed, of the Third Parties who are also responsible, albeit partly, for the existing pollution. The NGO support and active participation in combating pollution is an effective way and needs to be propagated” (BSEC, 2014a: online).

Another relevant issue for the CBC region is the issue of natural threats, especially flooding. Maritsa River is the biggest river on the Balkan peninsula with a catchment area more than 53.000 km<sup>2</sup>. Maritsa River basin has been quite densely populated (more than 2 million people on the Bulgarian territory), highly industrialised and with intensive agriculture. The basin area at the upper course of the river has predominantly high-mountain character while the character in the middle and lower river course is plain. The biggest tributaries of Maritsa River are Tunca and Arda Rivers. While Arda River does not belong to the Bulgarian-Turkish border area, the Tunca River crosses the border region and marks the border between the two countries for about 9 km. Tunca River catchments area is about 7884 km<sup>2</sup> and the length on the Bulgarian territory is 350 km. Arda and Tunca Rivers converge the main stream of Maritsa river on Turkish territory, south of the Bulgarian – Turkish border near the city of Edirne.

The climatic and geographical characteristics of Maritsa and Tunca River Basins lead to specific run-off conditions: flash floods, high inter-annual variability, heavy soil erosion reducing the channel and reservoirs' capacities through sedimentation, etc. The destructive forces of climatic hazards manifesting themselves in the form of rainstorms, severe thunderstorms, intensive snowmelt, floods and droughts. Climate change is a causative element in flood disasters. Despite of the significant number of reservoirs and cascades having total capacity for Maritsa and Tunca about 2.2x10<sup>9</sup>m<sup>3</sup> and for Arda about 1x10<sup>9</sup>m<sup>3</sup> in the Bulgarian territory, their retention possibilities are not sufficient to reduce (control) the floods downstream. In February 2005 and March 2006, significant flood hazards occurred in Maritsa River Basin. A lot of losses in agriculture occurred, in 2006, along the lower part of Tunca, 2.500 ha agricultural area were heavily affected and downstream at the city of Edirne flooded area was 37.500 ha.

Starting from PHARE Cross-Border Co-operation Programme (CBC) between Bulgaria and Turkey as well as continuing with Bulgaria-Turkey IPA CBC Programme 2007-2013, several projects have been implemented so to prevent the floods in the CBC region. (cf. Plovdiv, 2014: online). As part of prevention, four telemetric hydrometry stations have been established in Bulgarian part of the Maritsa catchments, one is on the Arda river, east after Ivaylovgrad dam (close to Greece border), two stations installed on the main channel of Maritsa river, one in Plovdiv city the other one near to Svilengrad town and the forth one established on Tunca River in Elhovo. These stations are recording continuously and supplying real time river data using satellite and GSM communication systems to the both countries. The project "Capacity Improvement for Flood Forecasting in the TR-BG CBC Region" (CRIS No. TR0602.15-02/001) is complementary to the above mentioned EU funded Bulgarian project "Capacity Improvement for Flood Forecasting in the BG-TR CBC Region" (CRIS No. 20051017- 453.01.01). This is the Service component, which is being executed as a Technical Assistance (TA) for Flood Forecasting and Early Warning System (FFEWS) for the TR-BG cross border system. In addition to the Technical Assistance, the project focus on specific works in river Maritza (Meriç) and Tundja, with enlargement of new channel, implementations of 4 hydro-meteorological stations with the supply of devices for the measurement of the depth of flow and the rain, and the implementation of a junction channel between the Maritza river and the Tundja river. The direct beneficiary is the General Directorate of State Hydraulic Works (DSI), in Ankara and the Region section of DSI in Edirne.



As mentioned in the LogFrame of the project, the Specific objectives are:

- To reduce the number of accidents, injuries, death and economic losses as result of improved flood protection and flood hazard prevention measures in the TR-BG border region (Edirne Region),
- To strengthen the capacity for monitoring, timely detection and early warning of flood phenomena in the TR/BG border area.

In order to aim those objectives, the project implements two components:

- The design, implementation and calibration of a Flood Forecasting and Early Warning System which predicts 10, 20 and 30 hours in advance the flood in the Region of Edirne,
- The implementation of works for the (i) the enlargement of the riverbed of Maritza river, (ii) the implementation and equipments of hydrometric stations upstream Edirne, and (iii) the digging up of a new connection channel between the Maritza and the Tundja River.

Although the above mentioned serious input in terms of risk preventions of floodings in the CBC region, there is still a ground for increasing the capacity between the partnering countries during the programming period 2014-2020.

Another environmental threat for the CBC region are fires that occur as a result of climate change so respective measures need to be tackled. During the programming period 2007-2013 there are good examples for cooperation between respective Bulgarian and Turkish equivalent institutions in terms of population prevention of natural and man-made hazards. This is a good ground for continuous cooperation between the partnering countries.

### *Challenges*

- The region is vulnerable towards natural hazards and coastal threats, which negatively corresponds to the intensified effects of climate change manifesting themselves through an increase of the frequency and intensity of natural hazards (flooding, droughts, etc.).
- The region as a low energy efficient area and its high dependency on fossil fuels faces challenges of energy security in energy supply.
- The increasing pressure on the environment due to urbanisation, intensified agriculture, and transport worsens the existing negative situation of local environmental pollution in different sectors.
- Despite existing initiatives for the protection of the Black Sea, the region faces a number of major challenges including the decrease of biological resources, declining diversity of spaces and the reduction of aesthetic values.

### *Needs:*

- Integrated and coordinated territorial approaches as well as more and better measures, including a higher degree of information sharing, are needed for the effective management of natural hazards and climate change risks which will gain in gravity and frequency.
- Existing (economic) pressure on natural resources needs to be reduced, as e.g. economic growth needs to be decoupled from the use of natural resources; labour intensive pollutant sectors like textile, leather and chemistry therefore need to be modified.
- The good environmental conditions of the region need to be kept and developed; natural parks and ecological zones need to be further improved.
- A sustainable management and the protection of natural resources is a necessity for the CBC region to



improve the efficiency of use of natural resources in the area.

- A better integration of the protected areas into spatial development is needed.
- Actions and common approaches are needed to improve the environmental state and the conditions of the Black Sea (incl. coastal zones) and to further promote and encourage already existing initiatives in the area.
- In the field of sustainability, all activities need to take the well-being of the natural environment, the society and the economy – as well as their reciprocal influences – into consideration.

## Sustainable transport and public infrastructures

The CBC region is served by a number of transport infrastructures, additionally three border crossings are in operation in the area: Kapitan–Andreevo/Kapıkule, Lesovo–Hamzabeyli and Malko Tarnovo– Dereköy. In the field of TEN-T and the core network (aiming at removing bottlenecks, upgrading infrastructure, etc.), the region is part of the Orient/ East-Med corridor (cf. EU COM, 2013b: online). “The Orient/East-Med Corridor connects the maritime interfaces of the North, Baltic, Black and Mediterranean Seas, allowing optimising the use of the ports concerned and the related Motorways of the Sea. Including Elbe as inland waterway, it will improve the multimodal connections between Northern Germany, the Czech Republic, the Pannonian region and Southeast Europe. It extends, across the sea, from Greece to Cyprus ” (EU COM, 2013c: online). Taking into account the vulnerability of the regions towards the mobility of persons and goods shows that the region is endowed with less air and sea transport infrastructure. “This relative weakness, however, implies that there is considerable opportunity for the successful implementation of development strategies based on transportation hub functions in this part of Europe” (OIR et al., 2011: 16). The high vulnerability in the field of accessibility, may be expressed in " a twofold challenge, where a capacity which could possibly offset accessibility disadvantages is not yet available" (OIR et al., 2011: 20; cf. p. 16).

This is also underlined by the fact, that "Turkey and the Mediterranean neighbourhood have distinctly lower road densities, they are also sparsely populated. Rail network densities compared to population, on the other hand, are distinctly higher within Europe than in Neighbourhood states" (OIR et al., 2011: 20).

The region is crossed by the A1 Trakia Motorway from Sofia to Burgas on the Bulgarian side of the border. Furthermore a rather new motorway, the A4 Maritsa Motorway, is crossing the Turkish border region and connects the provinces of Haskovo and Edirne. The O-3 Motorway in Turkey furthermore connects the province of Edirne with Istanbul. The state roads D100, D110, D550, D555 are connecting both provinces to each other and to the motorway. The main share of roads in Edirne and Kırklareli includes village roads, in Edirne village roads amount around 1.800 kilometres, in Kırklareli around 1.900 km (cf. Turkish Statistical Institute, 2012b). Both provinces hold just a small share of motorways (51 kilometres in Edirne and 70 kilometres in Kırklareli) (cf. Turkish Statistical Institute, 2012b).

The railway network in the cross-border area is operated by the Bulgarian State Railways (BDZ) on the Bulgarian side and by the Turkish Republic State Railways (TCDD) on the Turkish side of the CBC region. Regarding railway service, there exists only one cross border connection (for railways) which is located at the border of Bulgaria and Turkey (Svilengrad/Kapıkule). The length of railway kilometres amounts 96 kilometres in Edirne, and 110 kilometres in Kırklareli (cf. Turkish Statistical Institute, 2012b).

The biggest airport of the region is located in the district of Burgas. The Burgas Airport served 2,4 Mio. passengers in 2012 and is the second biggest airport in Bulgaria. Nearest airports to the region are Çorlu (120 km) , İstanbul (220 km) in the Turkish territory and Sofia (200 km) on the Bulgarian territory. This makes the access from other Turkish cities, especially from the capital difficult.

The harbour of Burgas is the largest harbour in Bulgaria and within the CBC Region. The provinces of Edirne and Kırklareli do not have a significant port.

Generally, public infrastructure in the region is far developed, e.g. “the public water supply infrastructure serves 99,6% of the population of the Bulgarian side and 92% of the population of the Turkish side of the programme area. In terms of quality of this service there are still some problems with water loss during transport on Bulgarian side of the cooperation area” (Bulgaria-Turkey IPA CBC Programme 2007-2013, 2011: 18). Additionally, also energy infrastructure is well developed, whereas especially natural gas has become an alternative for both, households and industries (cf. Bulgaria-Turkey IPA CBC Programme 2007-2013, 2011: 18).

#### Challenges:

- A clear core-periphery pattern in road and rail is still visible in the CBC region.
- The region is characterised by its peripheral situation in a European perspective, which is further intensified by a low level of accessibility, including low densities of transport infrastructure.
- There exists partly inefficiency of public infrastructure in different sectors including waste and wastewater treatment.
- In some cases visa issues occurred and could partially hinder some projects` implementation.
- Challenging situation in order to safeguard the natural resource fresh water.

#### Needs:

- Inefficiencies in public infrastructure provision need to be reduced, preferable applying a cross-border approach to lessen redundancies (e.g. in the field of water supply utilities and wastewater treatment plants).
- Harmonising with EU technical legislation on increasing levels of treated waste water and disposed waste is necessary for the treatment of waste waters arising from the industry sector.
- The development of new and better forms of public transport is needed.
- Transportation projects aiming at the integration of the Black Sea harbours and the enhancement of the North-South connection of the region are relevant issues.
- The market share of railways needs to be increased, which will have positive effects on the safety level and the travel time; additionally connections to the TEN-T network need to be established.

## Tourism and cultural and natural heritage

The tourism and cultural and natural heritage are important mean for the joint development of the area and illustrates a main asset of the co-operation area. In this direction both countries Bulgaria and Turkey have strong relationships over the years – from the very beginning of the CBC cooperation and of course in the current Bulgaria-Turkey IPA CBC Programme 2007-2013.

According to United Nations World Tourism Organization (UNWTO) sustainable tourism is a tourism envisaged as leading to management of all resources in such a way that economic, social, and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems.

*“Tourism is an important sector of the European Union’s economy. It supports economic growth and employment. One of our biggest challenges, however, is to reinforce and improve sustainable tourism development in order to ensure the long-term competitiveness of the industry. By managing tourism in a*

*sustainable way we aim to ensure that we recognise the limits and capacity of our tourism*



*resources and encourage tourism development that balances optimising the immediate economic, environmental and socio-cultural benefits, whilst also ensuring the long-term future for our European tourism industry. Our priority is that Europe maintains its position as the leading tourism destination in the world. Since 1990, the number of international tourist arrivals to the EU has more than doubled. However, in order to retain its market share, the EU's tourism industry needs to significantly improve its competitiveness and sustainability, taking into account aspects such as product and service quality, social and environmental responsibility, natural resources, and diversity of cultural heritage and local identities".<sup>1</sup>*

The culture and nature in the area are rich, unique as well as diverse and are possible basis for continuation of traditional actions as well as establishment of new joint touristic development actions.

## **NATURAL HERITAGE. STRANDZHA / ISTRANCA MOUNTAIN**

Strandzha/Istranca is a mountain massif in southeastern Bulgaria and the northwestern part of Turkey, in the southeastern part of the Balkans between the plains of Thrace to the west, the lowlands near Burgas to the north and the Black Sea to the east. Its highest peak is Mahiada (Mahya Dağı) (1,031 m) in Turkey, while the highest point on Bulgarian territory is Golyamo Gradishte (710 m). The total area of the massif is approximately 10,000 km<sup>2</sup>. The climate of the area is considerably influenced by the Black Sea and is predominantly humid continental in the mountains and humid subtropical at the coast. Major rivers in the area are the Veleka (147 km) and the border river Rezovska (12 km). Strandzha Natural Park, established in 1995 in the Bulgarian part of the massif, is the largest protected area in Bulgaria, embracing 1,161 km<sup>2</sup> (448 sq mi), or about 1% of Bulgaria's total territory. Strandzha/Istranca mountain is a place of extraordinary natural and historical riches. A living museum – it is a bridge between two continents: Europe and Asia. This makes the area unique in Europe for its flora and fauna. The special nature here is a result of its geological past, climate and geographical location. The plant communities in the mountain developed before Europe was separated from Asia by the formation of the Istanbul Strait that now connects the Black Sea and the Mediterranean. Land-ice never reached the mountain during the ice-ages. This lack of glaciations has created a unique window to the past. Plants that were once widespread on the European continent during the Tertiary period are now only preserved in Strandzha/Istranca. That is why the mountain is a living museum. The landscape of Strandzha/Istranca is beautiful. A sea of green, hilly woods is intersected by naturally meandering rivers. The longest of these, the Veleka River, flows out into the Black Sea in an untamed estuary. Strandzha/Istranca mountain is reach with karst terrain, with steep limestone cliffs, many mineral springs and complex cave systems. The mountain is a haven for wildlife. Steep and stony hillsides, and deep ravines and gorges are the home of spectacular birds and mammals such species as: Wildcat, Golden Jackal, Otter, Black Stork, Golden Eagle, Eagle Owl and Corn Crake. 134 Bird species breed in the park, but many more can be seen. The Via Pontica bird migration route brings many more species in large numbers to this special area, bringing the total recorded number of bird species to 270. During the migration, enormous groups of storks, pelicans and eagles fly over the park and along the coast. The area has a very rich culture and history as well. Inhabited by the Thracians in antiquity, the area is famous with a large concentration of ruins of Thracian sanctuaries and sacrificial altars, dolmens and other archaeological objects.

## **INEADA / İĞNEADA LAKES AND LONGOZ FORESTS NATIONAL PARK**

The Park is located at the Turkish part of the CBC area. It is defined as a National Park on 13.11.2007. The lakes within the borders of İğneada are famous with its multiple species of fishes and oxygen-rich atmosphere. Although İğneada has 7 lakes, the most important ones are Mert Lake, Hamam Lake, Erikli Lake and Saka Lake. The first lake “Mert Lake” is just about 12 Kms far away from the Bulgarian border. It is known that, in the lagoons of İğneada, in the lakes, on the wetlands and on the streams 30 different species of fish live. Mert Lake has the highest diversity of fish between those lakes. Hamam and Pedina Lakes can also be defined as an accommodation point for birds, wild ducks and swans coming from Bulgaria, Russia and from the Danube River. The Longoz forests which are completely covered with water during winter and spring has a floristic

<sup>1</sup> Preamble of the above document, Speech of Antonio Tadjani, Vice-President of the European Commission, responsible for Industry and Entrepreneurship





composition of mixed forest trees of 8-15 meters tall. The protection of the habitat of these forests has crucial importance. Because, these forests are not only a rare natural value for Turkey but also for Europe.

## CULTURAL AND HISTORICAL HERITAGE

The cultural heritage of the region is broadening its importance both at national and international level.

### EDIRNE CITY – LIVING MUSEUM

One of the most ancient cities in the region is Edirne. The city is one of the oldest settlements of both Thrace and Anatolia. Dating back to the neolithic age 7.000-6.000 B.C. with last excavations, examples of prehistoric monuments – dolmens, menhirs and tumulus – can be seen from its outskirts, notably in the Çardakaltı prehistoric settlement and in Lalapasa. The various historical names Edirne has had indicate the many historical periods it has been through. From Odrisia – founded by the Thracian civilisation Odryses in the 5th century B.C. – to Hadrianopolis – after Roman Emperor Hadrian who re-founded the city in the 2nd (123-124) century A.C., it was named Edirne by Sultan Murad I in 1361. As an economic and commercial centre, life in Edirne was rich and colourful and bazaars and caravanserais spread around the city. Four ancient bazaars are worth seeing: Bedesten, a covered bazaar where valuable goods and jewellery were sold, Arasta Bazaar, Ali Pasa Bazaar, the centre of commercial life in the 16-17th centuries with 129 shops, and Rüstempasa Caravanserai which was converted into a hotel in 1972. The last two buildings were built by the architect Sinan. Selimiye Mosque also built by the architect Sinan is considered as one of his masterpieces. He also built several bridges on the rivers in the region. Edirne is a city of rivers – the Meriç, Arda and Tunca rivers all meet at Edirne and join the Ergene river in the south. Edirne has become famous for the historical bridges on these many rivers – Gazi Mihal bridge built in 1420 is the oldest and Uzunköprü bridge the longest (1 392 m long) with 174 arches. The Museums preserve and reflect the history and traditions of the city: the health museum (Sultan Bayezid II. Mosque and Complex) is one of the most important health centres of its period 15 century where patients were treated with the sound of water, music, scents, various occupations, as well as medical knowledge and medicine; Edirne archeology and ethnography museum where household goods and furniture, rugs, coins, dresses, wooden goods are exhibited; Kırkpınar house – encasing belongings of Kırkpınar wrestlers, pictures and documents about Kırkpınar; Hafızağa kiosk (the city history museum) is an authentic example of traditional Turkish houses. The Edirne city has a rich cultural heritage that makes it a living museum. That is why, for example, Edirne City was awarded “2008 European Tourist Destination of Excellence in Intangible Heritage” (cf. EU COM, 2014: online).

### SOZOPOL AND NESSEBAR – THE ANCIENT BEAUTIES OF THE BULGARIAN SEASIDE

There are also many other ancient cities in the CBC region. In Bulgaria Sozopol and Nessebar are the most ancient ones. Sozopol is located 34 kilometers south of Burgas, at the most southern point of the wide Burgas bay. Centuries ago, the Thracians were the first settlers on these lands, but it was the Greeks who set up the first settlement in the 7th century BC. Sozopol is one of the oldest seaside towns in Bulgaria, set up as early as 610 BC by the Greeks. They named it Apolonia after their God of Beauty, Apollo. Gradually the settlement grew into a trading centre for honey, grain, wine, olive oil and pottery. In the 6th century BC, the town already had coined its own money. During the reign of the Bulgarian khan Krum, Sozopol became Bulgarian territory. Contemporary Sozopol is a tourist center. Sozopol attracts visitors with its narrow cobbled streets, old stone houses rising on both sides. Nessebar is located 37 km north of Burgas and is one of Europe's oldest towns,

inheritor of the ancient Thracian settlement, Messemvria. Messemvria developed into a big and well-fortified town, benefiting from the natural guard of the sea. It became an important trade center, too. In the 5th century BC, the town started to coin its own money. In the Middle Ages the town remained under Roman and Byzantine domination, up to 812, when it was included under the lands ruled by the Bulgarians, led by khan Krum. Legend has it that throughout its history, Nessebar had a total of 40 churches. Currently there are 26. The town is ranked number one in the world for number of churches per capita. Nessebar is also known as the Bulgarian Ravena, thanks to its numerous and well-preserved churches, especially those dating from the 13th and 14th centuries. In 1956 UNESCO placed Nessebar on its World Cultural Heritage list. That is why Sozopol, Nessebar and South



Bulgarian Black sea Coast (from Sozopol to the Turkish border) are involved in the the famous Michelin Guide “Top 1000 worldwide places to visit” (cf. Travel Michelin, 2014: online).

## NEW DEVELOPMENTS

Although the major tourist destinations of the CBC region are at the Black Sea coast, in the recent years some new forms of “all seasons tourist destinations/atractions” have occurred, e.g. SPA tourism, cultural tourism, historical tourism, rural tourism, sport tourism, etc. For the past several years one of the most popular attractions from the “all inclusive tourist packages” of Bulgarian Black sea hotels are short one or two days visits of the natural, cultural and historical places in the CBC region. Based on the assessment of the CBC Programme 2007-13, the touristic potential of the Turkish regions of the CBC region continues to be unexploited (cf. Bulgaria-Turkey IPA CBC Programme 2007-2013, 2011: 13), although over the years 2011 to 2013 some new four and five stars hotels have been build in Edirne so to further develop the tourism sector of the province.

Considering tourism figures trends for the period 2007 - 2012 show that there is a general increase of number of total nights spent in the region from 6,5 million in 2007 to 7,7 million in 2012. On one hand there is a decrease of the general number of accommodation establishments in the region from 1.217 in 2007 to 714 in 2012 mainly due to the closure of establishments in Burgas region during the economic crisis in the years 2008-2009. On the other hand for the same period 2007-2012 Haskovo Region, Edirne Province and Kırklareli Province have increased the accommodation establishments with 31 % on average. (cf. Turkish Statistical Institute, 2012c) (cf. National Statistical Institute Bulgaria, 2014i,j,k: online).

In the field of tourism there is an excellent ground for cooperation as it is a leading economic sector in all regional and national strategic documents in the field.

### *Challenges:*

- Climate change and its variety of negative territorial impacts illustrate major threats for the region’s summer tourism, which is especially for the Black Sea region (summer resorts) a main economic factor.
- The touristic exploitation of the region, including mass tourism, illustrates a major danger for the high valued landscapes, natural habitats and ecological corridors of the area; innovative tourism practises should be implemented in order to regulate and better prevent the exploitation of protected areas.
- Publicizing the natural, cultural and historical values of the region.

### *Needs:*

- There exists the need of a common cooperative management of cultural heritage in a sustainable way, taking into account the environmental needs of the protected areas, as well as coastal zones and nature reservoirs.
- New and better diversified tourist products and services are needed.
- Necessity of advertising tourism as well as natural, culture and historical heritage.

## Youth, education and skills

As already outlined, youth unemployment has been identified as a major future threat for the cross-border area and especially the Turkish side of the region “faces out-migration especially of young and educated people and depopulation of the rural areas because of better job opportunities in urban areas” (Bulgaria-Turkey IPA CBC Programme 2007-2013, 2011: 9).

The situation of education in the CBC area, shows a quite positive picture: the relative share of the population aged between 25 and 64 years with higher education is constantly on the rise in the





Bulgarian districts of the eligible programme area, whereas Yambol District registered with 22,4% of the total population aged between 25 and 64 years the highest share of population with a higher education level. Burgas District registered a value of 18,6% and Haskovo District recorded the value of 18,5% (cf. National Statistics Institute, 2014d,e,f: online). And also in Turkey, the share of the population aged between 25 and 64 years with higher education is constantly on the rise (8,9% in 2008 and 12,9% in 2012 in the district of Kırklareli; 9,7% in 2008 and 13,6% in 2012 in the district of Edirne). In contrary, especially the relative share of the population with primary or lower education is declining mainly in Burgas and Yambol District (36,1% in 2007 decreased to 29% in 2012 in Burgas respectively 22,2% in 2007 decreased to 17,9% in Yambol). For the district of Haskovo, no major improvements are though recognisable (cf. National Statistics Institute, 2014d,e,f: online). In Kırklareli and Edirne the relative share of the population aged between 25 and 64 years with primary or lower education is also decreasing although the share of the population with primary or lower education is on a higher level than in Bulgaria. In the education sector, the Turkish provinces of Edirne and Kırklareli are well equipped with different types of schools, in total there exist around 400 schools in Edirne and 300 schools in Kırklareli. Overall about 48.000 students and 7.600 graduates were involved in vocational training (school) and undergraduate programs of higher education institutions in these regions in 2012 (cf. Turkish Statistical Institute, 2011).

#### *Challenges:*

- Brain-drain occurrences and increasing out-migration due to missing (employment) possibilities for young employees exist in the region.
- Education and vocational training are not oriented to the demands of the regional labour market.
- There exist partly high levels of early-school leavers and to some extent poor reading competences of the region's population, according to PISA tests results.

#### *Needs:*

- Joint efforts to reduce brain-drain occurrences and increasing out-migration of young qualified employees are needed.
- The partly low education level needs to be improved - especially poor reading competences and early-school leavers need to be reduced – by improving the general quality of the education at all levels.

## **Local and regional governance, planning and administrative capacity**

For the past decades Republic of Bulgaria and Republic of Turkey became partners in many areas. These relations “have made comprehensive progress in every field and contacts at all levels have increased. Framework required for improving bilateral economic and commercial relations has been completed” (Ministry for Foreign Affairs, 2012: online). Today the relations have enhanced, at present Bulgaria and Turkey are two neighbouring and allied countries which have improved “active role in regional cooperation processes and have similar foreign policy orientations” (Ministry for Foreign Affairs, 2012: online).

Nowadays the countries are important trading partners, e.g. increased bilateral trade volume from 2,4 billion Euro in 2010 to 2,83 billion Euro in 2011 (Ministry for Foreign Affairs, 2012: online).

For spatial planning in Bulgaria, the local governments are the basic units, and the municipal council is the deliberative body. Municipal councils also hold the competence of preparing master development plans and local land use regulations as basis for spatial planning in Bulgarian municipalities (cf. Tosic et al., 2010: 81f.). Although the districts – which are corresponding to the NUTS-3 units – represent a de-concentrated state administration unit and are responsible “for implementing the government's policy at regional level. There is no elected district government. The district administrations are part of the State organisation and are financed from the State budget. Its competences are mainly to supervise the legal decisions of the local authorities and to participate in the preparation of regional development plans” (Tosic et al., 2010: 82).



On the national level, the Ministry of Regional Development (MRD) holds the competence for spatial planning. Relevant planning documents include the national integrated spatial development scheme (whole country), the district development schemes (district, region), the master development plans for the territories of municipalities and towns as well as detailed development plans (municipalities, towns) (cf. Tasic et al., 2010: 84).

In Turkey's planning system, the plans could be classified as follows according to the level of territorial competence: the development plans, strategic spatial plans and regional plans at national and NUTS II level, the territorial arrangement plans covering the map scale from 1:25,000 to 1:100,000 mainly at provincial level corresponding to NUTS III level, and the land development plans covering the map scale less than 1:5,000 at municipal level.

In terms of development plans, the Ministry of Development (MoD) has the legal mandate in the preparation of national and regional development plans. In this respect, MoD prepares the national development plan (NDP) and the national strategy for regional development (NSRD). MoD makes the development agencies prepare the regional development plans at NUTS II level in line with NSRD and NDP. In terms of spatial plans, the Ministry of Environment and Urbanization (MoEU) has the authority to prepare the spatial strategic plans both at national and regional levels.

In compliance with national and regional planning decisions, the territorial arrangement plans of non-metropolitan provinces are prepared by the MoEU and territorial arrangement plans of metropolitan provinces are prepared by Metropolitan Municipalities. At municipal level, the land development plans comprising the master plan and the implementation plan are prepared by the municipalities in line with the territorial plans. Land use, physical planning and zoning processes are included in land development plans.

Besides cross-border cooperation, Bulgaria and Turkey are both members of the BSEC (Organisation of the Black Sea Economic Cooperation), in which for the period 1 January - 30 June 2014 Bulgaria had the chairmanship. The Members of the BSEC Albania, Armenia, Azerbaijan, Bulgaria, Georgia, Hellenic Republic, Moldova, Romania, Russia, Serbia, Turkey and the Ukraine cooperate among others in the areas of Tourism, Trade & Economic Development Environmental Protection and Transport (cf. BSEC, 2014b: online).

#### *Challenges:*

- The existing legislative differences between two participating countries in regional and local governance and planning challenge local authorities to develop joint strategies and interventions.
- The administrative capacity and possibility of absorbing EU funds for cooperation is partly limited.
- Common management efforts of institutions across borders are needed to face increasing man-made and natural disasters (both in frequency and scale).

#### *Needs:*

- Measures needed to improve public services.
- Improvements for a coherent and better integrated assessment and management of risks (e.g. climate change, critical infrastructure) are needed.

## **Competitiveness, business environment and SME development, trade and investment**

The cross-border region of Bulgaria and Turkey is marked with insufficient economic growth rates, a generally disadvantageous economic situation and a high unemployment rate. Both, Bulgaria as well as Turkey, benefit from the establishment of cooperative networks in cross-border and/or isolated areas.



The industry of the region – except for the harbor area of Burgas – has a mono-structural character and is concentrated in the big cities, whereas in border communes agriculture and forestry (Strandja Mountain) prevail. Just on Black Sea coast marine tourism is developed but beginnings of rural tourism appear in Strandja area (natural and cultural artifacts of Strandja Natural Park). The biggest industrial center in the region is Burgas (shipbuilding, chemical industry, tourism) followed by Yambol and Haskovo.

Agriculture is dominating in border communes with traditional crops as cereals, fruits and vegetables, grapes. Stock breeding is prevailing pasture grounded in the mountain. As a whole agriculture is faced with a number of restrictions: dispersed ownership, reduced irrigated areas, obsolete facilities, shortage of investments and new technologies, deficiencies in the integration with the food industry, etc. Today, both sides of the border show a low level of GDP per capita in purchasing power parities (up to 13.900), additionally the area is very vulnerable towards the distribution of income. Taking a look at the Gini coefficient indicates, that especially in the Bulgarian regions of the CBC area, inequalities of income are visible (coefficient: more than 34). On the Turkish part of the eligible programme area the coefficient ranges between 32,1 and 34.

Generally, the majority of enterprises in the CBC region are small and medium sized (SMEs), the share of SMEs amount 98% on the Bulgarian side and 96% on the Turkish side (cf. Bulgaria-Turkey IPA CBC Programme 2007-2013: 13; Bulgarian National Statistical Institute, 2014). In the Turkish provinces Edirne and Kırklareli nearly 40.000 companies of different sectors exist.

The largest number of companies is available in the wholesale and retail trade, repair of motor vehicles and motorcycles branche as well as in the transport and storage sector ( cf. Turkish Statistical Institute, 2012d). In 2012, the companies based in Edirne imported \$121 million and exported \$47 million. Companies in Kırklareli imported \$138 million and exported \$141 million (cf. Turkish Statistical Institute, 2012e).

#### *Challenges:*

- SMEs, which form the basis as well as the majority of businesses in the CBC region, show a lack of competitiveness compared to global economic activities.
- The existing business structures and the low level of investment in R&D and research diffusion are responsible for lower average growth rates in comparison to the EU's main economic partners.
- Unsatisfactory situation of the business environment and existing disparities between inland and coastal municipalities (mainly in the Bulgarian part).
- The Black Sea region illustrates an expanding market with major development potential, especially for energy and transport flows.

#### *Needs:*

- There exists the need to improve the access of SME's to the European single market and to increase the recognition of the region's enterprises beyond the border.
- The reduction of interregional economic disparities – especially in rural areas – is needed.
- The improvement of competitiveness and productivity of SMEs is needed.
- Need to create better conditions for sustainable economic development in the regions.

## **Research, technological development, innovation and ICT**

In terms of R&D the CBC region is under developed and is not ranked among the leading R&D regions of Europe. Nevertheless there are four universities in the CBC region. The investments in R&D are far from the national levels both for Bulgaria and Turkey, mainly due to the structure of economy.



A look at the Bulgarian districts shows, that in Burgas district, the expenditure on R&D is at comparably higher level than in the other two districts (Burgas: 5.337 thousand BGN, Yambol: 444 thousand BGN, Haskovo: 341 thousand BGN) of the participating area.

For the NUTS-2 region Yuzhentsentralen (district of Haskovo), innovations are mainly visible in the sector of agriculture and food, additional the Commission identified a potential of regional research organisations/universities to become centres of excellence (cf. EU COM, 2012f: online).

In Bulgaria, the relative share of households with internet access is constantly increasing; between 2007 and 2012 the relative share increased strongly up to 50%, whereas especially Burgas region shows a value of 53,5% of the households having access to the internet in 2012 (Haskovo region: 47,5%; Yambol region: 46%) (cf. National Statistical Institute Bulgaria, 2014i,j,k: online).

Regarding ICT Turkey in total shows an increase in the field of households with internet access (starting with 19,7% of the households with internet access in 2007, reaching 47,2% in 2012) and the share of individuals aged 16-74 regularly using the internet (starting with 30,1% in 2007, reaching 47,4% in 2012) (cf. Turkish Statistical Institute, 2014) and has set quite ambitious targets for the year 2023, including:

- “Reaching 30 million broadband subscribers
- Providing internet connection for 14 million houses at a speed of 1,000 Mbps
- Increasing the sector's share in GDP from 2.9 percent to 8 percent
- Becoming one of the top 10 countries in e-transformation
- Having 80 percent of the population computer literate
- Increasing the number of companies to 5,500; employees to 65,000; and exports to USD 10 billion in TDZs
- Increasing the ICT sector's size to USD 160 billion, with a market growth of around 15 percent each year
- Increasing the R&D expenditure to GDP ratio to 3 percent from 0.85 percent” (Republic of Turkey/Prime Ministry, 2014c: online).

#### *Challenges:*

- Research and innovation are increasingly internationally interlinked.
- Generally, there exists a low level of investment in R&D and innovation, a low level of employees being active in the sector of science and technology and ICT is just insufficiently used in the area.
- ICT infrastructure is mainly concentrated on major cities and the market for innovative ICT products and services is highly fragmented.

#### *Needs:*

- It needs to be ensured, that Europe's research and enterprise networks are generally connected to global knowledge networks.
- There exists the need to promote the development of broadband infrastructure and the introduction of online service in different fields (government, business, health, education, research).
- Policies need to be better coordinated and resources need to be better specialised to improve poles of ICT excellence in Europe.
- Framework conditions and access to finance for R&D and innovation need to be improved.



## II. SWOT analysis: Potentials and Barriers for further development

The SWOT analysis is an analytical tool to assess the efficiency of policies and programmes to obtain an overview highlighting positive and negative aspects for different policy and development options. The analysis provides a formal way of identifying strengths and weaknesses of each option and of examining the opportunities and threats that arise from them.

To conduct the analysis both kinds of information for the SWOT analysis – the internal ones as well as the external ones – were identified with the gained information from the desk research.

Additionally, the method shows which potentials may result from combining internal strengths of a region with the possible opportunities, identified from external strategic documents or current trends. Moreover, the analysis reveals, how difficulties (weaknesses) can illustrate a possible regional potential, if combined with current trends and possible opportunities. The combination of these identified internal and external strengths, weaknesses, opportunities and threats finally led to potentials and barriers identified for the region.

### 2.1 Strengths, Weaknesses, Opportunities and Threats

#### Internal strengths

Employment, labour mobility and social and cultural inclusion	
1	Partly positive demographic developments (positive net migration), mainly in the Turkish regions of the area
2	High life expectancy and birth rates corresponding to the respective national average
3	Increased employment and activity rates
4	Culture of social solidarity and assistance
Environment, climate change adaptation and mitigation, risk prevention and management	
1	Moderately good conditions of different environmental media, including air, water and soil, being appreciated by the local residents
2	Strong tradition of preserving and managing nature, esp. maintenance of biodiversity, and respect for the environment
3	Abundance of natural resources
4	The region hosts a dense network of protected areas and a number of protected areas with well-preserved biodiversity and ecosystems: Strandja Nature Park (BG), Gala Lake National Park (TR), Kasatura Korfezi Nature Reserve (TR) Saka Lake Nature Reserve (TR)
5	Progressive modernisation of the productive system and declining of final energy consumption (possibly induced by the crisis, not efficiency)
Transport and public infrastructures	
1	Sufficient rail network densities, mainly in Turkish regions
2	Major improvements in the road sector, connecting the two countries, including new construction and rehabilitation of roads
3	Far developed regional public infrastructure and on-going improvements in some sectors, i.e. water supply infrastructure, energy infrastructure
4	Three, well-functioning border check points
Tourism and cultural and natural heritage	
1	Cultural heritage as important regional and identity building asset - culture, heritage and traditions are rich, unique and diverse

2	Existing natural, historical and cultural assets of good conditions for tourism activities
<b>Youth, education and skills</b>	
1	Good adult education system
2	Access of population to all levels of education
3	Well-equipped education system in the Turkish regions and increase of the number of universities
4	Increasing share of population with a higher level of education (tertiary education)
5	Widespread ICT infrastructure in formal education, mainly in Turkish regions
<b>Local and regional governance, planning and administrative capacity</b>	
1	Partnership and existing experience in CBC cooperation and in implementing common programmes and joint projects
2	Good bilateral relations and traditionally good relations among people as basis of continuing CBC of mutual interest
3	Existing framework for improving bilateral economic and commercial relations
4	On-going decentralisation processes, supporting economic autonomy and their budgets
5	On-going administrative and judicial reforms in Bulgaria, aiming at the introduction of specific tools for policy making and implementation
6	Partly high administration capacity of local governments and high rates of disbursement of EU funds
<b>Competitiveness, business and SME development, trade and investment</b>	
1	SMEs form the majority of businesses in the area
2	Increased economic activity and increased number of employees, production and services of SMEs
3	Access to existing industrial infrastructure and newly developed industrial sites
4	Workforce with comparatively low wage expectations
5	Positive development regarding the GDP per head
<b>Research, technological development, innovation and ICT</b>	
1	Existing hotspots of R&D activities in the field of chemical industries, ICT, energy and agriculture
2	Partly existing regional R&D plans
3	Increasing R&D expenditures
4	Partly high share of households with internet access

### Internal weaknesses

<b>Employment, labour mobility and social and cultural inclusion</b>	
1	Partly strong negative demographic development (decrease of population, higher ageing index than national average), mainly in the Bulgarian regions of the area and in rural areas
2	High unemployment rate and high vulnerability concerning the transformation of labour markets
3	High rate of unregistered employment and just limited coverage of the social security system, mainly in the Turkish regions of the area
4	High seasonal unemployment, due to instability in the tourism sector (strong focus on summer tourism)
5	Brain drain occurrences, due to high unemployment rates
6	Low level of adaptability and employability of people disadvantaged at the labour market

7	Discrepancy between existing professional qualifications of the labour force and labour market demands and expectations.
8	High risk of poverty and low income levels
9	Low level of labour force participation and employment, particularly for women
<b>Environment, climate change adaptation and mitigation, risk prevention and management</b>	
1	Local environmental pollution, including groundwater pollution with phosphates or nitrates
2	Lack of sewerage systems in the majority of small municipalities
3	Bad environmental state of the Black Sea including decrease of biological resources, declining diversity of spaces and reduction of aesthetic values
4	Burden of nature hazards, caused by combinations of several hazards such as droughts, extreme temperatures, forest fires and floods, mainly in highly vulnerable Bulgarian regions
5	Larger areas are effected by erosion, mainly in the province of Kırklareli
6	Vulnerability towards the adaptation to climate change and below average performances in adaptive capacities
7	Inefficient cooperation in management of natural resources and inadequate coordination for environment protection purposes; protected areas are not sufficiently integrated into the spatial development of the region
8	Low energy efficiency and high dependency on fossil fuels
9	Missing management of energy problems
<b>Transport and public infrastructures</b>	
1	Low accessibility in a European context (rail, road, air, water)
2	Imbalance among different modes of transport, generally favouring road transport (harmful effects on the environment, low sustainability)
3	Partly poor quality of the road network
4	Mostly old single-track rail network and lack of high-speed railways between larger cities
5	Insufficient hinterland access, part. In terms of railways, and inadequate connection between regional growth poles
6	Lack of regional public infrastructure and inefficient infrastructure systems in some sectors, i.e. ICT, sewage, wastewater, etc.
7	In some cases visa issues occurred and could partially hinder some projects` implementation.
8	Waste of drinking water
<b>Tourism and cultural and natural heritage</b>	
1	Seasonal character of tourism and low diversification of tourist products and services
2	No major tourist destinations, except the Black Sea summer resorts
3	Touristic potential of mainly Turkish regions continues to be unexploited (lack of promotion, marketing support., etc.)
4	Lack of protection and commercialisation of natural and historical heritage
5	Inefficient cooperation in the management of historical and cultural heritage resources
6	Low integration of cultural heritage in the tourist product development
7	Restoration of archaeological sites (e.g. in Edirne) is lacking behind
<b>Youth, education and skills</b>	



1	Bulgaria shows a lower quality of secondary education within the EU (OECD-survey for mathematics, reading and science) and a decreasing number of teachers
2	Low enrolment rate in secondary education (esp. for girls), mainly in Turkish regions
3	Limited career services and career information, mainly in Turkish regions
4	High level of early-school leavers mainly in Turkish regions
5	Turkish universities located in the CBC region show performances below average compared to the national average.
6	High level of youth unemployment
7	Out-migration of young and educated people leading to brain drain occurrences
<b>Local and regional governance, planning and administrative capacity</b>	
1	Limited administrative capacity and utilisation capacity at local level
2	Partially lack of cooperation and coordination among public institutions and organisations
3	Smaller municipalities facing difficulties in the sustainability of their investments in infrastructure projects
4	Existing differences in the pace of the quality of governance among the different countries of the Black Sea region
<b>Competitiveness, business and SME development, trade and investment</b>	
1	Lack of general SMEs' competitiveness and low level of productivity
2	Low level of local entrepreneurship initiatives, lack of entrepreneurial and innovative culture, and start-ups
3	Insufficient economic growth rates and generally disadvantageous economic situation (low level of GDP in PPP)
4	Declining investment expenditures, foreign investments concentrating on unproductive sectors failing to create permanent jobs
5	Existing inequalities of income, especially in the Bulgarian regions
6	Segmentation of the local economy, mono-sector and marginal nature
7	Lack of mutual recognition of the market beyond the border and limited business information flow
<b>Research, technological development, innovation and ICT</b>	
1	Not sufficient ICT infrastructure in rural areas
2	Low level of ICT usage, mainly in Turkish regions
3	A low share of the employees is employed in science and technology (HRSTC)
4	Very low values of expenditure on R&D

### **External opportunities**

<b>Employment, labour mobility and social and cultural inclusion</b>	
1	Migration as mitigating factors of the effects of ageing on the labour market
2	Bulgaria has explicit constitutional references to regional and social inequalities
3	Increasing demand for qualified work force
4	More and better opportunities for social inclusion of disadvantaged and disabled people to create better conditions for involvement of youths at the labour market
<b>Environment, climate change adaptation and mitigation, risk prevention and management</b>	

1	Promotion of sustainable development through fisheries management, research, data collection and stock assessment in the Black Sea region by the EU.
2	Exploration of new ways to ensure sustainable and responsible use of fish resources
3	Richness of renewable and alternative energy resources and high potential for the generation of solar power
4	Cross-border cooperation for sustainable use and management of natural resources of mutual interest
5	Full and effective use of financial instruments of the European Union to address the problems associated with the environment
<b>Transport and public infrastructures</b>	
1	The CBC region is part of the Orient/ East-Med TEN-T corridor thus target area for territorial EU infrastructure support.
2	Opportunities for the successful implementation of development strategies based on transportation hub functions
3	The Black Sea Strategy aims at active supporting of regional transport cooperation with a view to improve the efficiency, safety and security of transport operations
4	Black Sea Synergy cooperation area aims at managing movement and improving security
5	Strategic location within the TEN-T network and between Europe and Asia, as well between Europe and the Middle East (transit transport)
<b>Tourism and cultural and natural heritage</b>	
1	Cultural and historical heritage as important potentials for CBC development from the social, economic and environmental aspect
2	Opportunities for development of economically sustainable cultural products and services based on the demand for new tourist destinations and experience
3	Existing potential for alternative and diversified tourism activities
4	Culture as a potential generator of new products and employment possibilities
5	Abundance of cultural landmarks and natural resources as precondition for the diversification of the currently available tourist products and services
<b>Youth, education and skills</b>	
1	Opportunities for cooperation among the educational institutions, between the educational and training institutions and business companies and cross-border labour market initiatives and exchange of know-how between related institutions
2	EU2020 flagship initiative "Youth on the move" aiming at enhanced performance of the education systems and the facilitation of the entry of young people to the labour market
3	Presence of a relatively well-developed educational system
<b>Local and regional governance, planning and administrative capacity</b>	
1	Regional cooperating enhancing mutual confidence
2	Opportunities for further development of partnerships between the civil society and the public administration
3	Development of mechanisms for cross-border institutional support and sharing of good practices
4	Both countries are members of the BSEC
<b>Competitiveness, business and SME development, trade and investment</b>	
1	Several initiatives to develop free trade areas in the Black Sea
2	EU2020 flagship initiative "an industrial policy for the globalisation era" aiming at an improved business environment, notably for SMEs, and to support the development of a strong and sustainable industrial base able to compete globally
3	The Black Sea Regions illustrates an expanding market with a great development potential, especially for energy and transport flows

4	Increasing importance of SMEs in the economy
<b>Research, technological development, innovation and ICT</b>	
1	Promotion of capacity-building and Science & Technology policy dialogue with the Black Sea countries by EU COM
2	EU Framework Programme for Research and Innovation, Horizon 2020, aiming at securing Europe's competitiveness
3	Rapid development and increase in the use of ICTs and innovation

### External threats

<b>Employment, labour mobility and social and cultural inclusion</b>	
1	Demographic change and the main factors of shrinking population and ageing society
2	Risk of young employees losing their qualification by not participating in further training
3	Increasing unemployment ratio
4	Unemployment driving migration to other regions/abroad
5	Negative effects – incl. ageing, active-passive rate, extensity of unregistered employment, etc. – affect the financial system's sustainability negatively
6	Poor employment opportunities in rural areas leading to the concentration of business activities and employment opportunities in big towns
7	Educational system not corresponding to dynamically changing economy and labour market.
8	Increasing levels of poverty and social exclusion
<b>Environment, climate change adaptation and mitigation, risk prevention and management</b>	
1	Increasing frequency of natural hazards (incl. flooding, droughts, fires etc.) as one result of climate change
2	Decreasing summer precipitation (water scarcity) and increasing temperatures
3	Gradually changing climatic conditions
4	Partly polluted rivers, aquifering underground water and are lowering continuously
5	Increasing pressure on the environment due to urbanisation, intensification of agriculture, transport, etc.
6	Overconstruction on the Black Sea coast line
7	Inefficient water resource management and flood protection
8	Water and coastal zone pollution from various sources (e.g. Danube, Sea of Marmara, Mediterranean) are out of control of the regional authorities
9	Inefficient use and management of favourable natural conditions and resources to enhance the development potential
<b>Transport and public infrastructures</b>	
1	Increasing rate of isolation due to missing investments in infrastructure
2	Negative effects of climate change and extreme weather effects influencing transport safety of all modes
3	Clear core-periphery patterns in road and rail transport
4	High dependence on imported fuel resources for transport
<b>Tourism and cultural and natural heritage</b>	
1	Low integration of the cultural heritage in the tourist product development
2	Missing diversification of tourism

3	Climate change and its major negative impact on summer tourism
4	Mass tourism as major danger for landscapes, natural habitats and ecological corridors
5	The lack of restoring archaeological sites prevents an efficient usage of the region's cultural and tourism potential
<b>Youth, education and skills</b>	
1	Educational system not corresponding to the dynamically changing economy and labour market (education system unable to prepare the youth for the labour market)
2	Vocational education not being labour market demands oriented
3	Centralist structure of higher education system
<b>Local and regional governance, planning and administrative capacity</b>	
1	Relatively still low level of absorption of EU funds for cooperation between Local authorities
2	Different laws and regulations in the CBC area, including EU as well as non-EU members (consequences in terms of administration and legal framework)
3	Difficulties in coordinating national and regional levels as well as public and private sectors
4	Differences in fiscal discipline
<b>Competitiveness, business and SME development, trade and investment</b>	
1	Existing differences in the pace of economic reforms and the quality of governance
2	Still insufficient economy growth rates compared to EU average values
3	Low rate of adaptability and high level of competition to the common European market
4	Interregional economic disparities, primarily between urban and rural areas
5	Lack of alternative financing instruments for SMEs
6	Increasing pressure of the global competition
<b>Research, technological development, innovation and ICT</b>	
1	Raising importance of (existing) connections to global knowledge networks
2	High fragmentation of the market for innovative ICT products and services
3	Low investments and slow development of R&D
4	Low technological level of the economy deepening the structural disparity

## 2.2 Potentials and Barriers

Based on the identified SWOT, potential linkages between internal and external factors of analysis were identified, which were the basis for the definition of future barriers and potentials of development.

These barriers and potentials help to figure out:

- Which potentials are resulting from the combination of the internal strengths and weaknesses of the cross-border area with the possible opportunities, identified from external strategic documents or current trends?
- Which barriers and difficulties the area is facing by combining the internal strengths and weaknesses with current threats?



- The combination of the different internal and external factors (strengths x opportunities, strengths x weaknesses, threats x opportunities, threats x weaknesses) were then merged to thematic clusters and similar links and ties were grouped together. The reason of this clustering within the four quadrants of the SWOT-matrix was the identification of four different groups of potentials and barriers:
- Existing potentials (EP) result from combining the internal strengths of a region with the external opportunities. These potentials can also be termed as “cash cows”. EPs represent positive characteristics of a region with positive trends, which can support the already well performing regional characteristics.
- Possible potentials (PP) result from combining the internal weaknesses of a region with the external opportunities. Possible potentials are also called “rising stars” and illustrate the chance for the cross-border region to overcome the internal weakness by using the existing opportunities.
- Existing barriers (EB) result from combining the internal weaknesses of a region with the external threats. EBs can be termed as so-called “poor dogs”, these barriers are a combination of internal and external factors, which are really tough challenges and hard to overcome.
- Possible barriers (PB) result from combining the internal strengths of a region with the external threats and are also termed “question marks”. These issues show to external trends that can be challenged by using the internal strength of the region. Negative external developments can be turned around by using regional strengths.

The method therefore represents a mixture between clustering of information and a more creative technique of combining issues of certain interest. Additionally it visualises the main output of the analysis and shows possible thematic linkages within different internal and external factors of the cross-border region. This output portrays the possibilities of the SWOT analysis: negative developments in the region can be combined with external opportunities and show therefore an unexpected opportunity for regional development.

The following four sub-chapters describe the findings of the SWOT-analysis which are one of the main elements of the definition of the thematic concentration of the Bulgaria-Turkey IPA CBC Programme 2014-2020.

### *Existing Potentials (EP) – Strengths x Opportunities*

1. **Good basis for regional cooperation:** Generally, the region shows a very good basis for regional cooperation, based on the existing culture of social solidarity and assistance and common strong traditions e.g. of preserving and managing nature. This situation depicts a joint basis for further regional cooperating enhancing mutual confidence as well as the development of mechanisms for cross-border institutional support and sharing of good practices in different fields.
2. **Good foundation for improvements in the environmental sector:** The region generally displays very good environmental conditions, hosts a variety of natural resources and a strong tradition of preservation, including a dense network of protected areas, is visible. These positive factors are combined with an on-going promotion of natural resources and a generally existing richness of renewable and alternative energy resources. This goes in line with the internal strength of local universities partly showing a focus in the field of energy. Additionally, the Black Sea Strategy actively supports regional transport cooperation, in order to improve the efficiency of transport options, which has a positive effect on the region’s environment.
3. **Constantly improving situation of the youth, research and education:** The education system and research sector are improving, which is depicted in the increasing share of population with a higher level of education and an increase of R&D expenditures over the last years. Additionally, SMEs illustrate important businesses in the area, their economic activity has raised and the general equipment with infrastructures has improved over the years. These positive developments in combination with the increasing demand for qualified work force and the cooperation of educational institutions, education and business companies as well as EU-wide initiatives such as the flagship initiative “Youth on the



move” illustrate a major development potential of the cross-border area.

4. **On-going improvements in the fields of transport and economic development:** Positive developments including an increase in the level of employment and activity rates as well as the region’s strategic position in the TEN-T network and the existence of well-functioning regional border crossings depict relevant strengths of the area. These strengths are underlined by the Black Sea Strategy actively aiming at cooperation in the field of transport as well as by external improvements in regard to TEN-T and the establishment of transport hub functions. These opportunities provide the potential to improve transport efficiency and safety, based on partnership and existing experiences of former cross-border cooperation.
5. **Further touristic, cultural and environmental developments based on common heritage and traditions:** Cultural and historical heritage have been identified as extremely important potentials for cross-border development from the social, economic and environmental aspect. Based on the existing set of natural resources and protected areas (e.g. Strandja Nature Park (BG), Gala Lake National Park (TR), Kasatura Korfezi Nature Reserve (TR), Saka Lake Nature Reserve (TR)) as well as of cultural heritage as important regional and identity building asset, there exists the opportunity to develop economically sustainable touristic products and services and alternative and diversified tourism activities to enhance the economic situation in the area.
6. **On-going improvements in the field of institutional capacity and cooperation:** Partnerships as well as experiences of cross-border cooperation has well established traditions in the CBC region. The area is characterised by very good bilateral relations and an active framework for improving bilateral economic relations. Additionally, partly on-going reforms and decentralisation processes are constantly strengthening the regional level as such. The continuation of cross-border cooperation and the cooperation in the Black Sea region in general is further strengthening mutual confidence and partnerships.
7. **Further improving research and competitiveness:** The economic situation in the area is improving, which includes increased competitiveness and a raised level of R&D expenditure of regional enterprises. Generally SMEs are forming the majority of businesses in the area, and additional strengths include the progressive modernisation of the productive system, newly developed industrial sites and improved industrial infrastructure as well as existing research hotspots e.g. in the field of energy. Several initiatives and EU flagship initiatives, such as “an industrial policy for the globalisation era” as well as cooperative initiatives comprise the potential to further improve the already enhanced situation in the cross-border region.

#### *Possible Potentials (PP) – Weaknesses x Opportunities*

1. **Jointly combating NATURAL hazards and reducing environmental pollution:** Existing initiatives for sustainable development in the Black Sea region by the EU and existing cross-border cooperation initiatives for the sustainable use and management of natural resources of mutual interest bear the potential of improving the current situation of natural hazards. These extreme events, including floods, fires, erosion, have a particularly strong effect on the area, which shows a strong vulnerability towards climate change.
2. **Tourism and regional cultural and natural heritage as opportunities to further improve the employment and tourism situation:** The cultural and natural heritage of the CBC region are important potentials for further development, including economically sustainable cultural products and services and alternative and diversified tourism activities; these potentials are generally based on the abundance of cultural landmarks and natural resources. The heritage of the region therefore provides the potential to restrict the current situation of high unemployment rates and therewith connected negative effects by generating new touristic products and employment possibilities for the regional population. Simultaneously tourism weaknesses, including e.g. the seasonal character of regional tourism and



missing major tourist destination (except the Black Sea summer resorts), may be targeted.

3. **Cooperative action improving the transport situation:** Existing initiatives and strategies, including the Black Sea Strategy, the Black Sea
4. , as well as the EU infrastructure policy provide potentials to improve the low accessibility of the area. Additionally there exists the potential to further increase security of transport and to improve transport facilities in general (i.e. rail network, etc.).
5. **Cooperative action improving administrative and institutional capacity:** The continuation and improvement of cross-border cooperation in the area, including partnerships, support, and sharing of good practice, will improve the administrative capacity at local level.
6. **Promotion of R&D mitigating brain drain occurrences and the regional research basis:** The ongoing promotion of capacity-building and S&T policy dialogue with the Black Sea countries by EU COM as well as the EU Framework Programme for Research and Innovation – Horizon 2020, aiming at securing Europe's competitiveness – are major opportunities for improving the current regional situation of low investments in R&D and a partly low level of ICT usage. Additionally, the out-migration of well-educated young employees might be stemmed through an improved situation in the field of research and development.
7. **Educational cooperation improving the regional employment and education situation:** There exists a diverse set of opportunities regarding cooperation in the field of education, training and business companies in the cross-border context. A specific development potential includes the combination of the education system and the particular needs of private enterprises and the labour market. The EU2020 flagship initiative “Youth on the move”, illustrates a specific opportunity, enhancing the performance of the education system. These opportunities can target the existing weaknesses of the area of high unemployment rates, brain drain occurrences and of partly low enrolment rates of secondary education, limited career services and career information as well as of partly high levels of early-school leavers.

#### *Possible Barriers (PB) – Strengths x Threats*

1. **Increased activity rates and improved education situation, weakened by high unemployment:** Generally, the regional situation is characterised by improvements in the education system, the activity rates of employees and the GDP level. Although these positive developments may be hampered by the increasing unemployment ratio, which might lead migration to other regions and in succession to intensified concentrations of employees in urban areas (i.e. deterioration of rural areas). Additionally, the development barrier of the education system not being capable of reacting sufficiently on the dynamically changing economy and the labour market needs to be faced.
2. **Environmental media threatened by increasing pressures:** The moderately good condition of different environmental media, such as air, water and soil are threatened by increasing pressures of land use, including urbanisation, intensification of agriculture and transport. Additionally, the touristic exploitation of the area bears dangers for the region's environment (i.e. over construction, mass tourism, etc.).
3. **Strong tradition of protected areas threatened by increasing levels of pollution:** The region is characterised by natural assets and a moderately good condition of different environmental media, which are the basis for the dense network of protected areas. These valuable assets are endangered by external factors, including natural hazards, and pollution from various external sources. Very good cooperation capacity between relevant institutions in the region is already established.
4. **Education system not corresponding to regional needs:** Although the education system has improved (including e.g. vocational training, adult education system, etc.) there exists the danger of the education system not corresponding to the fast and dynamically changing economy and labour market.





5. **Missing infrastructure investments negatively influencing the transport system:** The transport system – which includes e.g. well-functioning border check points and mainly sufficient rail network densities – may be negatively threatened by missing investments in infrastructure and the clear core-periphery pattern which are clearly visible in the area.
6. **Major differences of law as threats for existing partnership:** The existing partnerships, which are based on former cross-border cooperation and good bilateral relations, are threatened by different laws and regulations. This results from the fact of the cooperation of EU- and non-EU-members and therefore difficulties in the coordination of different levels (local, region) and sectors (private, public). In some cases visa issues occurred and could partially hinder some projects' implementation. These threats depict possible barriers for future cross-border cooperation in the area.
7. **Positive developments limited by global pressure and strong economic disparities:** In the last years the economic activity in the region has improved and the number of employees has increased; SMEs as such form the majority of businesses in the area. Even due to these positive developments, there still exist insufficient economy growth rates compared to the EU average and major interregional economic disparities are visible. Additionally financing instruments for SMEs are missing and the generally low level of R&D expenditure hampers further development.

#### *Existing Barriers (EB) – Weaknesses x Threats*

1. **Raising unemployment and negative employment situation leading to out-migration and the loss of qualifications:** The region is characterised by partly strong negative demographic processes, high levels of unemployment, brain drain occurrences and out-migration of mainly young and well-educated people. These weaknesses are further reinforced by unemployment and especially poor employment opportunities in rural areas, leading to the concentration of business activities in urban areas. Additionally, young people, which cannot participate in the labour market, show the risk of losing their qualifications.
2. **Discrepancies between the needs of the labour market and the education sector:** Generally strong discrepancies between the education system and the needs of the labour market – which are constantly changing – are visible. The educational system cannot correspond to the dynamically changing economy and the labour market, therefore the risk of increasing poverty and low income levels gets further reinforced. Additionally, the quality of education in the cross-border area varies, secondary education shows a partly low quality and just limited information and services in the field of careers exist. This further intensifies the situation of the education system not fitting to the economy; growth rates and productivity are therefore lagging behind.
3. **Partly bad environmental quality asking for common approaches:** The regional environmental state is partly in a bad condition. Reasons therefore are environmental pollution, declining diversity of spaces and the decrease of biological resources. This situation is further intensified by increasing pressures on the environment, resulting from urbanisation, the transport sector and the intensification of agriculture. Additionally, water pollution is often out of the control of the regional authorities, due to its transnational character
4. **Increase of natural hazards in frequency and intensity targeting the economic, social and environmental situation:** Natural hazards, including droughts, extreme temperatures, forest fires and especially floods are important burdens for the area. Additionally, parts of the region are highly affected by erosion. These existing weaknesses are intensified through the increase of natural hazards in frequency as a result of climate change and gradually changing climatic conditions. These environmental effects have major effects on the economic, social and environmental situation of the cross-border area. Especially the touristic use of the area, which has mainly seasonal character, is endangered, through extreme weather events and the change of climatic conditions.



5. **Increasing isolation of the area due to missing infrastructure investments:** The area generally shows a quite low accessibility in a European context, whereas especially imbalances of the different modes of transport exist; road transport is obviously the favoured mode, the rail network shows partly a quite bad quality. Additionally, major differences between urban and rural areas are visible; the access of the hinterland is mainly insufficient. This situation is intensified by generally missing investments in infrastructure;
6. **Complicated cross-border cooperation based on different laws and regulations:** In some parts of the cross-border region a just insufficient developed level of cooperation is visible. The partly limited administrative capacity hampers cooperation, which is intensified by different laws and regulations in the cross-border area, including EU as well as non-EU members.
7. **Lagging behind in the field of research and productivity:** Low levels of productivity and competitiveness, insufficient economic growth rates and a low level of investments in the field of research and development are further intensified by interregional economic disparities (esp. between urban and rural areas), missing financing instruments for SMEs, and the raising importance of connections to global knowledge networks, which are not a main focus of the area; generally a quite high pressure of global competition on regional enterprises is present.

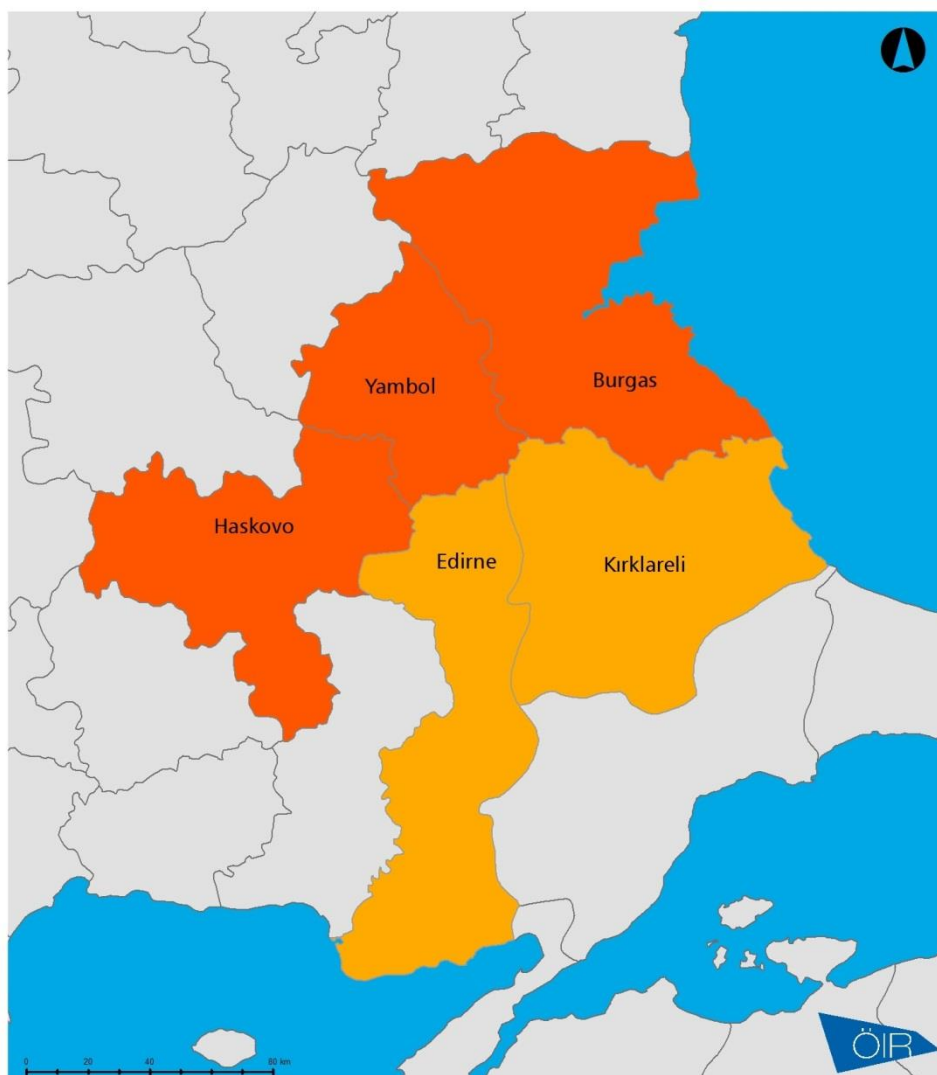


## III. ANNEX

### 3.1 Baseline analysis – cartographic and tabular information

#### *Geographic location*

**Figure 1:** Geographical location of the programme area. Source: OIR, 2014.



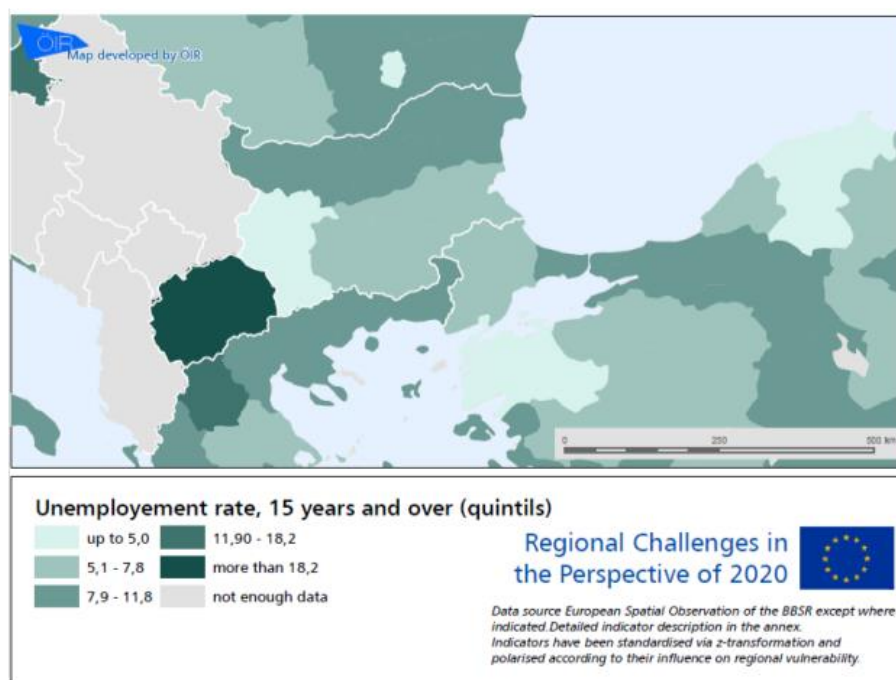
### Employment, labour mobility and social and cultural inclusion

**Table 1:** Employment figures (2007-2012)

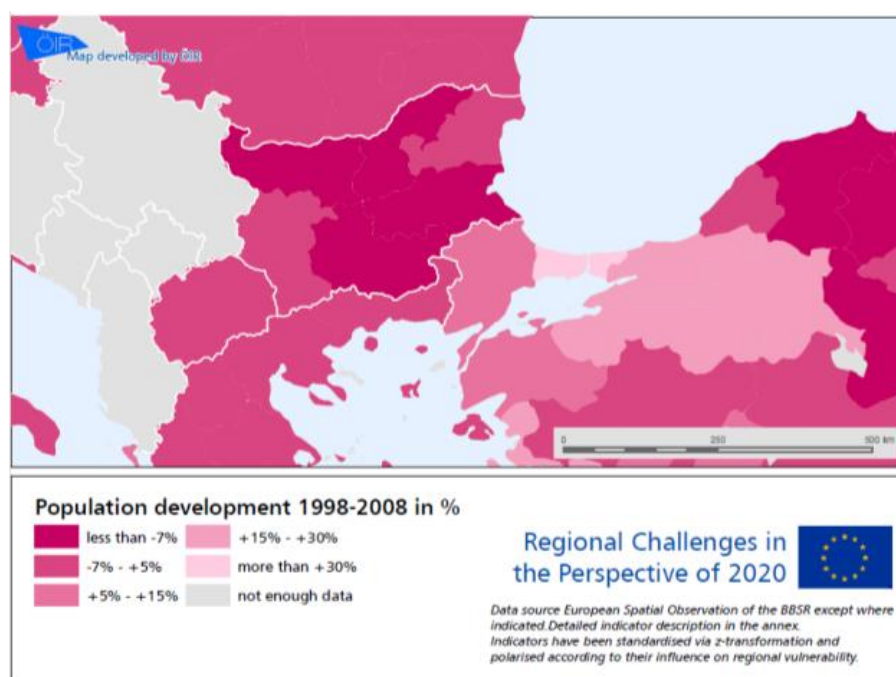
Indicators	Years					
	2007	2008	2009	2010	2011	2012
<b>Burgas District</b>						
Economic activity rate - 15 - 64 completed years (%)	62.1	63.9	63.8	63.3	63.5	64.8
Employment rate - 15 - 64 completed years (%)	59.5	61.7	61.3	57.2	55.5	57.3
Unemployment rate (%)	4.1	3.4	3.9	9.6	12.4	11.5
<b>Yambol District</b>						
Economic activity rate - 15 - 64 completed years (%)	68.4	68.8	66.9	67.0	67.4	72.5
Employment rate - 15 - 64 completed years (%)	63.1	64.1	60.8	56.9	57.8	61.4
Unemployment rate (%)	7.2	6.4	8.8	14.8	13.9	14.9
<b>Haskovo District</b>						
Economic activity rate - 15 - 64 completed years (%)	65.9	67.7	69.7	69.8	63.3	64.7
Employment rate - 15 - 64 completed years (%)	59.8	63.4	63.7	60.5	53.1	55.0
Unemployment rate (%)	9.2	6.4	8.5	13.2	16.0	14.9
<b>Edirne District</b>						
Economic activity rate - 15 - 64 completed years (%)	.	47.0	52.2	55.2	55.5	54.7
Employment rate - 15 - 64 completed years (%)	.	40.3	45.2	50.1	50.5	50.6
Unemployment rate (%)	.	14.3	13.4	11.2	9.0	7.5
<b>Kırklareli District</b>						
Economic activity rate - 15 - 64 completed years (%)	.	52.0	52.6	53.6	53.1	52.9
Employment rate - 15 - 64 completed years (%)	.	46.0	45.4	47.8	48.4	48.8
Unemployment rate (%)	.	11.5	13.6	10.8	8.9	7.9

Source: OIR, 2014 based on National Statistics Institute, 2014a,b,c: online; Turkish NA, 2014. / . no data

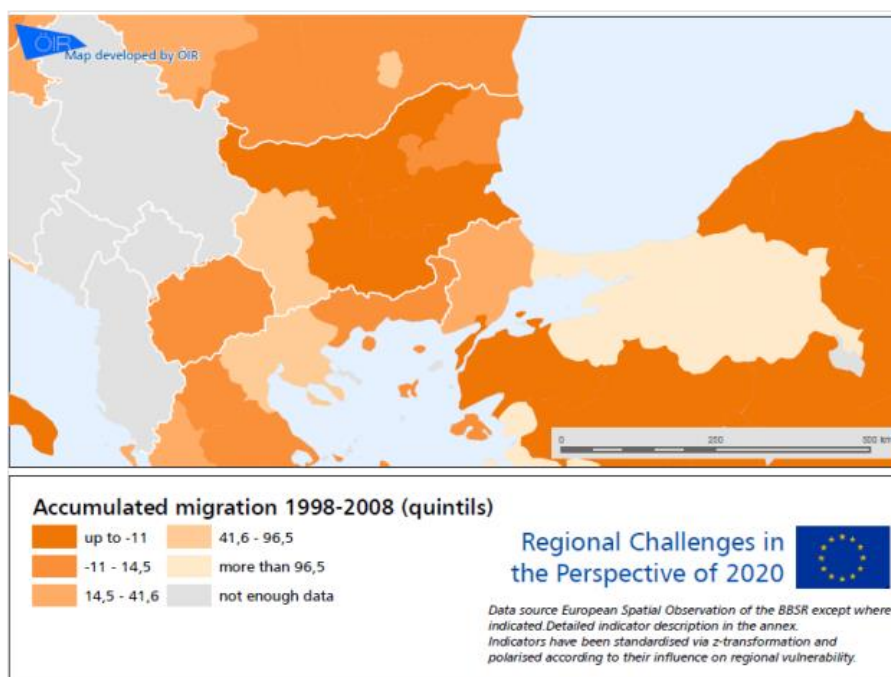
**Figure 2:** Labour market transformations – Unemployment rate, 15 years and older. Source: OIR, 2012.



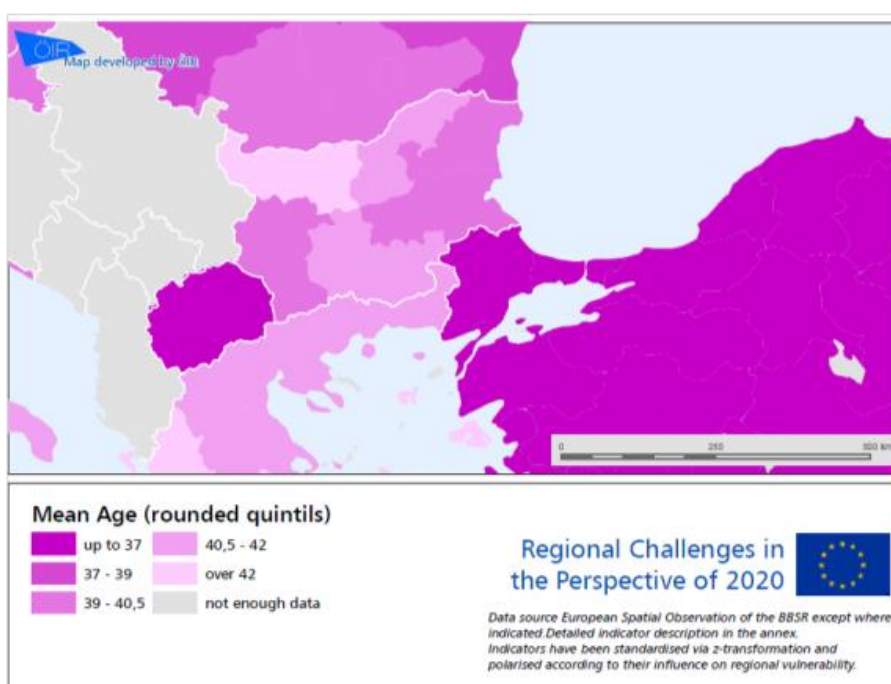
**Figure 3:** Shrinking population – Population development 1998-2008 in %. Source: OIR, 2012.



**Figure 4:** Shrinking population – Accumulated migration 1998-2008. Source: OIR, 2012.

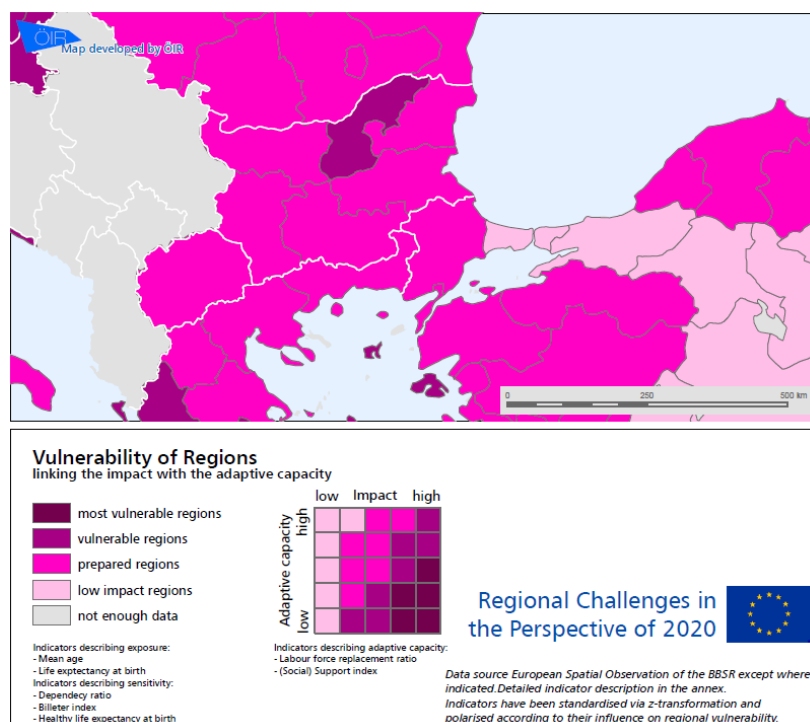


**Figure 5:** Ageing population – Mean Age. Source: OIR, 2012.





**Figure 6:** Ageing population – Mean Age – Vulnerability of Regions. Source: OIR, 2012.



## Environment, climate change adaptation and mitigation & risk prevention and management

**Table 2:** Total amount of loaded and unloaded goods, Baltic Sea (2008-2011)

Regions	Years			
	2008	2009	2010	2011
Yugoiztochen (Burgas)	15.932	13.337	12.822	13.520
Tekirdag, Edirne, Kırklareli	3.870	3.712	4.576	16.093

Source: OIR, 2014 based on: Eurostat, 2014.

## Sustainable transport and public infrastructures

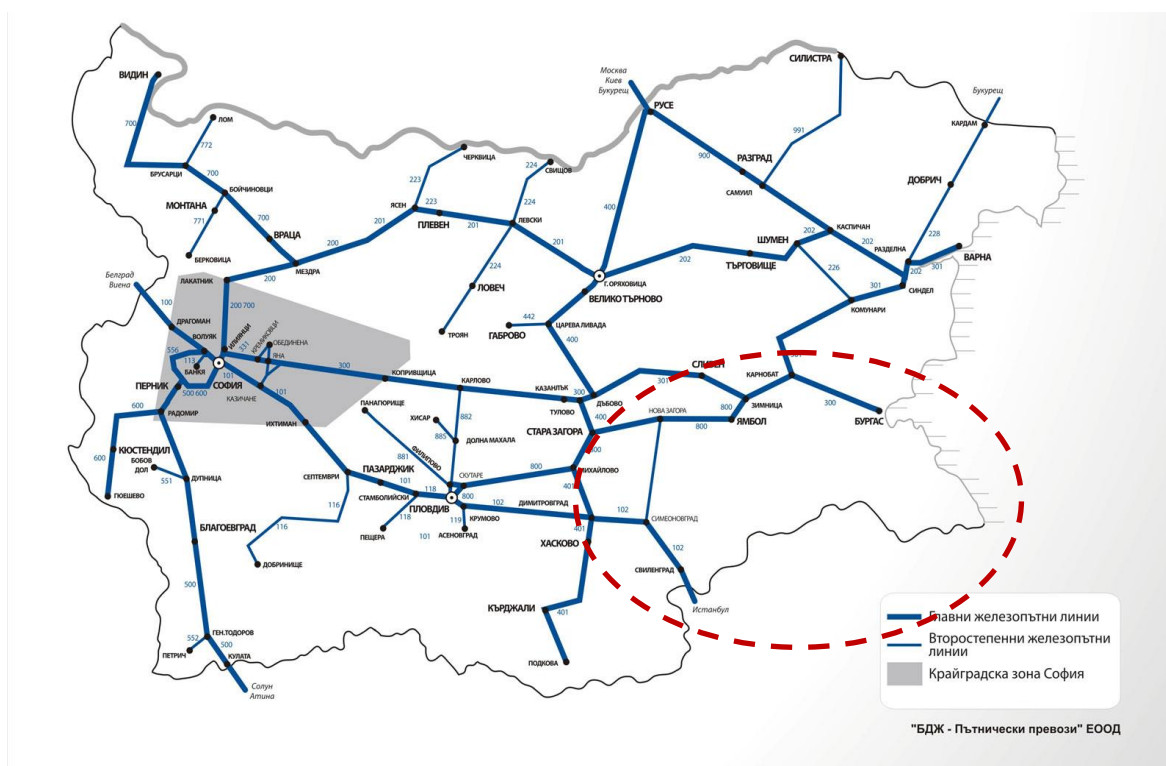
**Figure 7:** TEN-T Core Network Corridors (excerpt). Source: EU COM, 2013d: online.



**Figure 8:** Road network in the Turkish part of the CBC region. Source: Republic of Turkey, Ministry of transport and Communications, 2011: 6.



**Figure 9:** Bulgarian railway net. Source: BDZ, 2013: online.



**Figure 10:** Railway network in the Turkish part of the CBC region. Source: Trains of Turkey, 2014: online.



### Tourism and cultural and natural heritage

**Table 3:** Tourism figures (2007-2012)

Indicators	Years					
	2007	2008	2009	2010	2011	2012
<b>Burgas District</b>						
Accommodation establishments (number)	1 130	873	1 101	1 006	1 176	608
Nights spent - total (number)	6176482	6176373	5242098	6024540	7065474	7379959
<b>Yambol District</b>						
Accommodation establishments (number)	23	36	49	41	57	22
Nights spent - total (number)	43876	47723	69530	39101	49322	48176
<b>Haskovo District</b>						
Accommodation establishments (number)	33	34	34	48	45	44
Nights spent - total (number)	98080	102353	90856	101459	96120	97119
<b>Edirne District</b>						
Accommodation establishments (number)	25	26	28	27	30	32
Nights spent - total (number)	160690	173491	136152	170658	187846	155298
<b>Kırklareli District</b>						
Accommodation establishments (number)	6	6	5	3	4	8
Nights spent - total (number)	44334	43 986	33775	18449	23008	40522

Source: OIR, 2014 based on: National Statistics Institute, 2014; j.k: online, Turkish Statistical Institute, 2014

## Youth, education and skills

**Table 4:** Education figures (2007-2012)

Indicators	Years					
	2007	2008	2009	2010	2011	2012
<b>Burgas District</b>						
Relative share of the population aged between 25 and 64 years with higher education (%)	15.3	14.5	14.4	15.6	17.3	18.6
Relative share of the population aged between 25 and 64 years with secondary education (%)	48.6	48.2	48.3	51.2	52.3	52.4
Relative share of the population aged between 25 and 64 years with primary or lower education (%)	36.1	37.3	37.3	33.2	30.4	29.0
<b>Yambol District</b>						
Relative share of the population aged between 25 and 64 years with higher education (%)	17.6	15.6	18.3	19.2	18.0	22.4
Relative share of the population aged between 25 and 64 years with secondary education (%)	60.2	62.9	61.4	59.0	59.4	59.6
Relative share of the population aged between 25 and 64 years with primary or lower education (%)	22.2	21.5	20.3	21.8	22.6	17.9
<b>Haskovo District</b>						
Relative share of the population aged between 25 and 64 years with higher education (%)	16.4	18.0	18.6	19.4	17.1	18.5
Relative share of the population aged between 25 and 64 years with secondary education (%)	57.9	54.9	54.8	56.3	54.3	56.0
Relative share of the population aged between 25 and 64 years with primary or lower education (%)	25.7	27.1	26.6	24.3	28.6	25.5
<b>Edirne District</b>						
Relative share of the population aged between 25 and 64 years with higher education (%)	.	9.65	10.62	11.34	12.95	13.59
Relative share of the population aged between 25 and 64 years with secondary education (%)	.	17.48	18.03	19.33	20.13	20.56
Relative share of the population aged between 25 and 64 years with primary or lower education (%)	.	59.99	60.48	60.03	59.27	58.54
<b>Kırklareli District</b>						
Relative share of the population aged between 25 and 64 years with higher education (%)	.	8.93	9.72	10.61	12.18	12.89
Relative share of the population aged between 25 and 64 years with secondary education (%)	.	20.44	21.10	22.64	23.88	24.35
Relative share of the population aged between 25 and 64 years with primary or lower education (%)	.	61.16	61.15	60.10	58.63	57.69

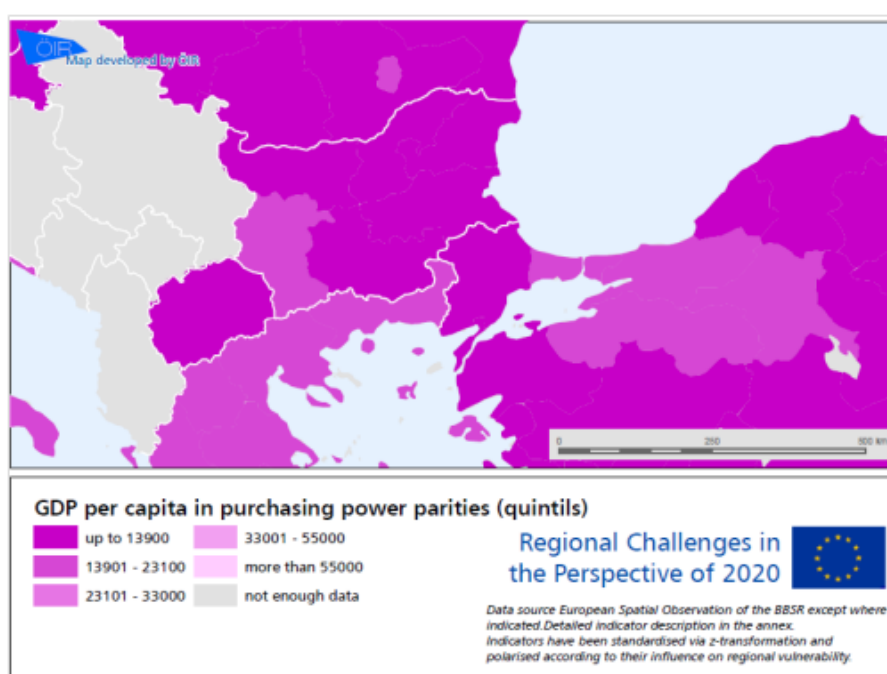
Source: OIR, 2014 based on: National Statistics Institute, 2014d,e,f: online; Turkish NA, 2014. / . no data

**Table 5:** Number of schools in Edirne and Kırklareli (2011)

2011	Edirne	Kırklareli
Pre-school	164	119
Primary school	156	123
General secondary school	27	21
Vocational and technical secondary school	48	34

Source: OIR, 2014 based on: Turkish Statistical Institute, 2011.

### Competitiveness, business environment and SME development, trade and investment

**Figure 11:** GDP per capita in purchasing power parities. Source: OIR, 2012.

**Table 6:** Number of companies in Edirne and Kırklareli (2012)

Number of companies, 2012	Edirne	Kırklareli
Electricity, gas, steam and air conditioning production and distribution	2	4
Information and communication	150	93
Finance and insurance activities	153	154
Real estate activities	178	206
Education	81	62
Other service activities	1.660	1.274
Mining and quarrying	86	30



Number of companies, 2012	Edirne	Kırklareli
Water supply, sewerage, waste management and treatment activities	13	6
Wholesale and retail trade, repair of motor vehicles and motorcycles	7.591	6.328
Accommodation and food service activities	3.404	2.691
Vocational, scientific and technical activities	922	657
Culture, arts, entertainment, recreation and sports	185	154
Manufacturing	1.626	1.402
Construction	1.500	1.097
Transport and storage	3.426	2.951
Administrative and support service activities	117	101
Human health and social service activities	143	144
<i>Total</i>	<b>21.237</b>	<b>17.354</b>

Source: OIR, 2014 based on: Turkish Statistical Institute, 2012d.

**Table 7:** Enterprises in the CBC region (2007-2012)

Indicators	Years					
	2007	2008	2009	2010	2011	2012
<b>Burgas District</b>						
Relative share of enterprises with up to 9 persons employed in total number of enterprises in the district (%)	90.8	91.6	92.6	93.5	93.4	93.6
Relative share of enterprises with 10-49 employees in total number of enterprises in the district (%)	7.6	7.0	6.2	5.5	5.6	5.4
Relative share of enterprises with 50-249 employees in total number of enterprises in the district (%)	1.5	1.2	1.1	0.9	0.9	0.9
Relative share of enterprises with more than 250 employees in total number of enterprises in the district (%)	0.2	0.2	0.1	0.1	0.1	0.1
<b>Yambol District</b>						
Relative share of enterprises with up to 9 persons employed in total number of enterprises in the district (%)	89.9	91.1	91.5	92.1	92.4	92.6

Indicators	Years					
	2007	2008	2009	2010	2011	2012
Relative share of enterprises with 10-49 employees in total number of enterprises in the district (%)	8.0	7.3	7.2	6.6	6.2	6.1
Relative share of enterprises with 50-249 employees in total number of enterprises in the district (%)	2.0	1.5	1.3	1.3	1.2	1.2
Relative share of enterprises with more than 250 employees in total number of enterprises in the district (%)	0.1	0.1	0.1	0.1	0.1	0.1
<b>Haskovo District</b>						
Relative share of enterprises with up to 9 persons employed in total number of enterprises in the district (%)	89.2	89.8	91.9	92.2	92.6	92.6
Relative share of enterprises with 10-49 employees in total number of enterprises in the district (%)	9.2	8.6	6.9	6.6	6.4	6.3
Relative share of enterprises with 50-249 employees in total number of enterprises in the district (%)	1.5	1.5	1.2	1.1	1.0	1.0
Relative share of enterprises with more than 250 employees in total number of enterprises in the district (%)	0.2	0.1	0.1	0.1	0.1	0.1
<b>Edirne District</b>						
Relative share of enterprises with up to 9 persons employed in total number of enterprises in the district (%)	97.63	97.68	97.86	97.73	97.46	97.17
Relative share of enterprises with 10-49 employees in total number of enterprises in the district (%)	2.18	2.18	1.89	2.01	2.31	2.51
Relative share of enterprises with 50-249 employees in total number of enterprises in the district (%)	0.16	0.13	0.22	0.23	0.22	0.29
Relative share of enterprises with more than 250 employees in total number of enterprises in the district (%)	0.04	0.01	0.03	0.03	0.01	0.04
<b>Kırklareli District</b>						
Relative share of enterprises with up to 9 persons employed in total number of enterprises in the district (%)	97.85	97.69	97.70	97.55	97.36	96.96

Indicators	Years					
	2007	2008	2009	2010	2011	2012
Relative share of enterprises with 10-49 employees in total number of enterprises in the district (%)	1.84	2.05	1.94	2.06	2.23	2.66
Relative share of enterprises with 50-249 employees in total number of enterprises in the district (%)	0.28	0.24	0.31	0.33	0.36	0.32
Relative share of enterprises with more than 250 employees in total number of enterprises in the district (%)	0.03	0.01	0.05	0.06	0.05	0.06

Source: OIR, 2014 based on: National Statistics Institute, 2014: online; Turkish NA, 2014.

### Research, technological development, innovation and ICT

**Table 8:** R&D & ICT in the BG part of CBC region (2007-2012)

Indicators	Years					
	2007	2008	2009	2010	2011	2012
<b>Burgas District</b>						
Expenditure on research and development (R & D) (thousand Levs)	5 191	6 206	6 221	5 367	5 187	5 337
Staff engaged in research and development (R & D) (number)	466	515	604	391	362	447
Relative share of households with Internet access (%)	16.1	22.9	31.5	40.6	47.3	53.5
Relative share of individuals aged 16-74, regulary using internet (at least once per week)	30.6	34.8	50.2	44.2	46.2	52.4
<b>Yambol District</b>						
Expenditure on research and development (R & D) (thousand Levs)	156	..	..	..	..	444
Staff engaged in research and development (R & D) (number)	67	..	..	..	..	77
Relative share of households with Internet access (%)	20.7	25.0	27.9	37.9	40.7	46.0
Relative share of individuals aged 16-74, regulary using internet (at least once per week)	31.7	29.9	49.9	37.4	43.4	53.7
<b>Haskovo District</b>						
Expenditure on research and development (R & D) (thousand Levs)	569	922	568	480	408	341

Indicators	Years					
	2007	2008	2009	2010	2011	2012
Staff engaged in research and development (R & D) (number)	45	48	55	20	12	17
Relative share of households with Internet access (%)	14.4	27.1	24.4	26.4	41.3	47.5
Relative share of individuals aged 16-74, regularly using internet (at least once per week)	30.1	42.6	38.5	31.8	39.1	45.5

Source: OIR, 2014 based on: National Statistics Institute, 2014g: online. / ... confidential data; . no data

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- BG: OP Structural Funds Transport 2007-13<sup>2</sup>
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<sup>2</sup> All Bulgarian structural Funds and ESIF documents are available at [www.eufunds.bg](http://www.eufunds.bg)



- BG: OP Structural Funds Regional Development 2007-13
- BG: OP Structural Funds Competitiveness 2007-13
- BG: OP Structural Funds Human Resource Development 2007-13
- BG: OP Structural Funds Administrative Capacity 2007-13
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- BG: Final Draft ESIF OP Regions in growth 2014-20
- BG: Final Draft OP Rural Development 2014 - 2020
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- Tourism development strategies of municipalities in the Bulgarian part of CBC area
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