ABSTRACT: Tourism plays an important role in Europe, and specifically in Bulgaria, and it makes a considerable contribution to employment and regional development. Usually, tourism is among the sectors which are used for introduction and application of different government measures and initiatives which aim at increase of employment. In spite of the commitment of public institutions in Bulgaria to stimulate tourism, as a form of sustainable development, employment and other economic activities, we still find strong disproportions in infra- and super-structure with tourism development being highly concentrated on the Black sea coast.

The aim of this paper was to define the main challenges for regional employment with respect to the specifics of the labor market requirements for new skills and competences, and bridging of the gap between the educational curricula and market demand.

KEYWORDS: employment, Bulgaria, tourism, labor market, regional development

Analysis of the dynamics of employment in Bulgarian tourism sector has proven to be relatively stable besides the turbulences of economic and financial crisis (see Table 1). There was a stable increase in the number of enterprises during the period 2008–2012 as well as in all other indicators such as turnover, production value, personnel costs, wages and salaries, and number of people employed.
Table 1. *Main economic indicators for Accommodation and food service activities*

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of enterprises – num.</td>
<td>22,172</td>
<td>25,962</td>
<td>26,073</td>
<td>26,071</td>
<td>26,540</td>
</tr>
<tr>
<td>Turnover – thous. BGN</td>
<td>2,916,145</td>
<td>2,826,352</td>
<td>2,831,185</td>
<td>3,133,917</td>
<td>3,349,435</td>
</tr>
<tr>
<td>Production value – thous. BGN</td>
<td>2,400,258</td>
<td>2,306,582</td>
<td>2,231,105</td>
<td>2,433,743</td>
<td>2,687,312</td>
</tr>
<tr>
<td>Value added at factor cost – thous. BGN</td>
<td>995,970</td>
<td>930,015</td>
<td>926,145</td>
<td>1,027,551</td>
<td>1,201,641</td>
</tr>
<tr>
<td>Total purchases of goods and services – thous. BGN</td>
<td>2,240,072</td>
<td>2,187,751</td>
<td>2,098,259</td>
<td>2,281,152</td>
<td>2,346,074</td>
</tr>
<tr>
<td>Personnel costs – thous. BGN</td>
<td>513,907</td>
<td>592,936</td>
<td>588,292</td>
<td>671,115</td>
<td>740,473</td>
</tr>
<tr>
<td>Wages and salaries – thous. BGN</td>
<td>423,408</td>
<td>497,625</td>
<td>498,800</td>
<td>566,593</td>
<td>626,436</td>
</tr>
<tr>
<td>Number of persons employed – num.</td>
<td>128,922</td>
<td>140,467</td>
<td>138,118</td>
<td>142,524</td>
<td>140,011</td>
</tr>
</tbody>
</table>

*Source: NSI*

The statistics shows that, during the period 2008–2012, the biggest number of employed people was concentrated in Restaurants and mobile food service activities (39%), Beverage serving activities (26%), and those employed in Hotels and similar accommodation (22%). Together, these groups represent 87% of total number of employed people in Tourism sector in Bulgaria. Tour operators and people employed in travel agencies represent approximately 4% of all employed people in that sector.

In terms of age structure of those employed in the Tourism sector in Bulgaria, the leading position is occupied by the age groups from 25–34 and 35–44, keeping the distribution of previous years (see Figure 1). As regards the gender differences in terms of employment, the share of employed women was stable (64%) over the last years, in comparison to employed men (36%) and with respect to all analyzed age groups. This imbalance is particularly specific for the Tourism sector and it could be explained by relatively low wages, among the lowest in the country (250 EUR on average), and disadvantages such as seasonality, mobility and employee turnover. This disproportion in gender structure of the employed is higher in Bulgaria compared to the average in EC-27 where women represent approx. 55% of all the employed in the Tourism sector.

With respect to the size of enterprise, it is notable that the major share of all employed people in Tourism is concentrated in SME with average number of employees between 2 and 9. The micro enterprises comprise 41% of total number of enterprises in the Tourism sector hiring between 0–9 people. Small enterprises represent about 33%, medium enterprises 18% and big enterprises just over 8% of total number of enterprises. This trend was relatively constant during the period 2008–2012.
The education level of people employed in Tourism, according to ISCED (International Standard Classification of Education), shows that 59% of the employed is at ISCED level 3-4, followed by 28% at ISCED level 5-6. This distribution shows that Bulgarian Tourism sector employs people whose level of education is higher when compared to the EC-27.

In summary, the dynamic characteristics of labor markets in tourism stand out with (1) high degree of inter-firm mobility, (2) almost equal number of people entering the Tourism sector and leaving it, (3) high level of mobility in occupations. There is no direct statistical data that can confirm the above statements, but a number of official reports and analyses undoubtedly present them as challenges for the labor market of the Tourism sector.

Territorial concentration of the people employed in Tourism sector, based on statistical division, follows the flows of the tourists, and it is mainly in the Black Sea region (Northeast and Southeast statistical regions) – see Figure 2. From the aspect of regions, the most significant is the South-West region (according to NUTS-Nomenclature of Territorial Units for Statistics) with concentration of 43% of all employed in the Tourism sector, followed by the South-Central (17%), and North-East and South-East regions with 13% each. These four regions: South-West, South-Central, South-East, and North East, recorded an increase in terms of concentration achieving 86% of total number of employed in Tourism. One of the possible explanations is that this distribution is based on to the development of tourism infra- and super-structure. When compared with the number of beds and nights spent by the tourists, the above mentioned four regions make 94% of total income from beds and nights spent.
The main challenges for regional development and employment in Tourism are competences, skills and qualification of the workforce. Today, more than ever, skills and qualifications matter. The crisis has speeded up the pace of change in the economy, and employers are increasingly concerned with what workers now, understand and are able to do in practice, rather than focusing on formal qualifications. Additionally, there is a growing understanding of the importance of transversal skills and competences, such as communication skills, digital competency, the ability to learn and a sense of initiative. Several correlated factors define the demand for better and adapted skills: globalization and increased international trade, the transition towards a low-carbon economy, the application of technologies, especially ICT, and changes in work organization, which are partially a consequence of technological and skills change. The next decade will face an increasing demand for a high-qualified and adaptable workforce and more skills-dependent jobs.

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ИЗАЗОВИ У РЕГИОНАЛНОМ РАЗВОЈУ И ЗАПОШЉАВАЊУ У ОБЛАСТИ ТУРИЗМА (НА ПРИМЕРУ БУГАРСКЕ)

СОЊА МИЛЕВА БОЖАНОВА
Софијски универзитет „Свети Климент Охридски“, Економски факултет
Цариградско шосе 125, бл. 3, 1113 Софија, Република Бугарска
Е-адреса: smileva@feb.uni-sofia.bg

РЕЗИМЕ: Туризам игра важну улогу у Европи, а посебно у Бугарској, и даје значајан допринос у области регионалног развоја и запошљавања. Туризам је сектор који се често користи за примену различитих владиних меро и иницијатива које за циљ имају повећање стопе запослености. Упркос посвећености јавних институција у Бугарској да стимулишу одрживи развој туризма, запослење и друге привредне активности, наилазимо на изразит несакупност између инфраструктуре и суперструктуре јер је развој туризма највише концентрисан на облацу Црног мора. Циљ овог рада је да прикаже главне изазове у вези са регионалним запошљавањем с обзиром на специфичне захтеве тражишта рада који се односе на нове вештине и способности, као и на премештање језа између образовног програма и потреба тражишта.

КЉУЧНЕ РЕЧИ: запослење, Бугарска, туризам, тражиште рада, регионални развој

ОРIGИНАЛНА НАУЧНА СТАТИЈА

ПРЕДИЗВИКАТЕЛСТВА ПРЕД ТУРИСТИЧКЕ ИНДУСТРИЈЕ ЗА РЕГИОНАЛНО РАЗВИТИЕ И ЗАЕТОСТ (НА ПРИМЕРА НА БЪЛГАРИЈА)

СОНЯ МИЛЕВА-БОЖАНОВА
Софийски университет „Св. Климент Охридски“, Стопански факултет
Цариградско шосе 125, бл. 3, 1113 София, Република България
Е-адреса: smileva@feb.uni-sofia.bg

РЕЗЮМЕ: Туризма играе ключова роля в Европа и в България в частност, по отношение на създаването на заетост и подкрепа за регионалното развитие. Отрасът е сред ключовите за прилагане на различни държавни мерки и инициативи за насърчаване на заетостта. Независимо от усилията на публичните власти в България чрез туризма да се насърчава устойчивото развитие, създава заетост и повишава икономическата активност по места, все още са налице значителни диспропорции както по отношение на инфра – така и за супер-структура като се наблюдава силно изразената концентрация на развитие на туризма по българското Черноморие. Настоящият доклад цели да изследва основните предизвикателства пред туризма за регионалното развитие и заетост на основата на спецификата на пазара на труда и изискванията за нови умения и компетенции, преодолявайки различията между образование и търсене на пазара.

КЛЮЧОВИ ДУМИ: заетост, България, туризъм, пазар на труда, регионално развитие