



ИКОНОМИЧЕСКИ УНИВЕРСИТЕТ ВАРНА

Вх. № PA20-445/25.03.2024г.

## REVIEW

of a dissertation for awarding the ESD of Doctor  
in PF 3.8. Economics,  
Doctoral Program Marketing

### 1. General information

**Review drawn up by** associated professor Svilen Ivanov, Ph.D., academic specialty Marketing

**Ground for submitting the review:** Participation in the Scientific Jury by order, No. RD-06-20/02.02.2024, amended. with No. RD-06-25/14.02.2024 of the Rector of the University of Economics - Varna and Decision of the Scientific Jury from 02.16.2024. in a hybrid format.

**Author of dissertation:** Yana Georgieva Balashova-Stefanova

**Dissertation topic:** Marketing development of the comparative advantages of a territory

### 2. Data about the dissertation student

Yana Balashova-Stefanova was born on July 17, 1979, in the city of Varna. She received her secondary education in VIII SOUPCHE "Al. S. Pushkin" - city of Varna. She completed her higher education at OCS with a bachelor's degree at the University of Economics - Varna in 2002, majoring in "Accounting and



Control" and a master's degree in "Corporate Marketing" at the same university. She also obtained a master's degree in "English Philology. Linguistics and Translation" at Shumen University "Bishop Konstantin Preslavski" in 2021.

Initially, she worked as an accountant and assistant manager, and then as an educational activity inspector in the Marketing department. From 2014 to 2021, she gained experience as a part-time assistant in the disciplines "Marketing", "Marketing Research", "International Marketing", "Distribution Logistics" and "Product Management" at the Bachelor's programs in UE-Varna. In 2015, she founded a non-profit association. Since 2020, she has worked as an English teacher at the Professional Technical High School - Varna. She participates in two scientific research projects and numerous international projects funded by the Grundtvig and Erasmus+ programs. This indicates that the Ph.D. candidate has accumulated significant professional and project experience in administration, education, and the non-profit sector.

### 3. General characteristics of the dissertation

The dissertation has a total volume of 339 pages and is structured in an introduction (6 pages), three chapters (214 pages), a conclusion (4 pages), a list of the literature used (16 pages), and appendices (99 pages). The dissertation contains 16 tables, 29 figures, and 18 appendices. The bibliography includes 277 sources (19 of which are online) in Bulgarian, English, French and Russian.

### 4. Assessment of the structure and content of the dissertation

The dissertation is written on a current and significant topic - the development of the comparative advantages of territories. Since in the Bulgarian marketing





literature, research and publications in this direction are limited, this argues for the need to carry out similar studies. At the same time, the chosen object of the study - the Municipality of Varna, considered a marketing territory - conditions the possibility of seeking practical and applied contributions from the research, especially because of the profile of the city as a tourist and cultural destination.

The introduction of the dissertation sets very clearly the scope of the research, its goals, and tasks and correctly describes the possibilities of application of the obtained results. A good impression is also made by the clearly defined main goal of the research – the derivation of guidelines for marketing development of the comparative advantages of the territory – which is fully tailored to the possibilities of the doctoral student and the resources available to her during his work on the dissertation. In this way, already at the initial stage, specific limitations are set with the expectations that the title of the dissertation evokes.

Two other goals are formulated - a review of literary sources related to the topic and the modeling of a process for marketing development of comparative advantages of the territory. The first of them is a mandatory feature of any scientific development, and the second one, because of the work done by the Ph.D. student, can be limited to the creation of a marketing research design to collect empirical data from the target groups to develop the comparative advantages in the territory of the Municipality of Varna in future projects (to reflect what was done in the dissertation). Concerning these goals, three tasks and three expected contributions are formulated.

Four main limitations are formulated, which support the reservations described above related to the definition of the main aims, objectives, and expected contributions of the study.

In Chapter One, in five separate paragraphs, an in-depth review of literature sources related to the marketing of territories and the development of comparative



advantages, including territories, is made. Based on the overview, a working definition for the marketing of territories is derived and a process for their marketing development through research and definition of the needs of the interested parties is described as a conceptualization.

It is noteworthy that within the framework of the theoretical overview, the importance of competing territories in the marketing development of a territory is brought out, but their study is not included in the empirical part of the dissertation. The penultimate paragraph of Chapter One theoretically summarizes the key aspects of the marketing development of the comparative advantages of territories. However, a careful reading reveals that this part describes the main elements of the design process and the collection of primary data that can serve as a basis for marketing development. In other words, the entire process of their development is not present here. The last paragraph of the first chapter attempts to conceptualize the marketing mix of a territory. In this sense, it can be pointed out that the author of the thesis fails to take a definite position on the issue of the degree of tangibility of the territory as a product, and from there on the exclusion of main groups of marketing incentives such as processes, personnel and physical evidence.

In the second chapter of the dissertation, a conceptual model of the process for marketing development of comparative advantages of the territory is presented (Figure 6., p. 98). The proposed process follows the main stages of a marketing research project to obtain empirical data. From this point of view, the thesis request for a proposed author's process for developing comparative advantages cannot be accepted. Rather, here can be found a conceptual design of marketing research to develop comparative advantages, rather than a complete process of their development. Or it can be concluded that marketing development itself is absent. In the second paragraph of the chapter, a project for the study of the





comparative advantages of the territory is presented, which describes the separate stages for collecting and processing empirical data.

Based on a literature review, key advantages of the territories are derived. In the following paragraph, a conceptual model of comparative advantage research is presented based on this overview. Although several relationships between individual variables were included in the model, the limitations state that such relationships were not explored. The last three paragraphs of this chapter formulate guidelines for the creation of research tools for collecting data in the survey and present guidelines for defining the comparative advantages of the Municipality of Varna based solely on a comprehensive content analysis of the published strategic documents of the municipality.

The third chapter presents the main results of the conducted parallel surveys - among residents of the Municipality of Varna, guests of the city, and representatives of local businesses. In the second paragraph, the one-dimensional distributions of the responses of the respondents from the three groups are described, giving the impression of inaccuracies in handling the terminological apparatus from the field of marketing research. The third paragraph of this chapter deserves attention, as it compares the responses of the three target groups, and based on indicating inconsistencies (discrepancies in evaluations), formulates several conclusions important for the study. Based on them, a SWOT analysis of the territory is designed, which serves as a starting point in the formulation of several guidelines that can serve for the future development of the comparative advantages of the Municipality of Varna. The guidelines are distributed within four main groups of marketing incentives related to product, price, promotion, and distribution.

In the conclusion, the author summarizes what is done in the dissertation. It can be pointed out that what is stated to a certain extent exceeds what is



accomplished. The wording used for the results fully matches the goals and objectives stated in the introduction. The methods used for collecting secondary and primary data are indicated, as well as those for analyzing the data collected. In the end, guidelines are formulated for the use of the results in the development of marketing advantages of territories and future studies.

The references show the extremely serious attitude of the author towards her research problem, as it includes more than 300 scientific publications and sources of secondary data related to the topic.

The language, style, and structure of the dissertation have the characteristics of a monographic work. A large part of the set goals and tasks are achieved and fulfilled.

The abstract fully corresponds to the dissertation.

It can be concluded that the author of the dissertation has deep scientific knowledge and has formed her view on the topic of territorial marketing and the comparative advantages of territories. The design of research instruments and the collection of empirical data related to the objectives of the research shows that the dissertation student can plan and conduct an independent scientific study that fulfills the conditions for acquiring the ESD of "Doctor" laid down in the normative framework.

4. Evaluation of the scientific and scientific-applied contributions in the dissertation work:

In the abstract, the dissertation student indicates three contributing points, of which two can be fully confirmed and one of them partially.

I accept that the dissertation is carried out as a "systematization, critical analysis and summary of the theoretical aspects of the categories "territory





marketing" and "comparative advantage" and the possibilities of applying the "theory of comparative advantages" to the territory". I also accept that the comparative advantages of the territory of the Municipality of Varna are identified and guidelines are drawn for their marketing development given the stated limitations - namely, based on the subjective judgments of three of the municipality's target audiences.

As for the third claimed contribution - "Development of a process model for the marketing development of the comparative advantages of the territory and a conceptual model of its research" - here I can only confirm the existence of a developed marketing research design for the collection of primary and secondary data, based on which guidelines can be derived for marketing development of the comparative advantages of the municipality, but not the existence of a "process model".

#### 4. Publications and participation in scientific forums:

Based on the provided documents, I find compliance with the quantitative requirements of the Regulations for the development of the academic staff at the University of Economics - Varna and with the minimum national requirements for awarding the educational and scientific degree "doctor".

#### 5. Confirmed or unconfirmed plagiarism in the dissertation;

The examination of the dissertation work and the author's abstract did not reveal any plagiarism.

#### 5. Critical notes and recommendations:



The title of the dissertation is sufficiently broadly formulated. This does not create a mandatory expectation that a project for marketing development of comparative advantages in a specific territory will be developed and presented. From this point of view, by formulating a set of clear and specific constraints, as is good practice for any scientific research, the aims and objectives of the dissertation can be formulated to match what is achieved. In this sense, it is not necessary to claim that an author's process for marketing the development of comparative advantage has been proposed. The marketing research design developed in the dissertation for collecting empirical data can be defined as a sufficient contribution point. It is the analysis of these data in the next stage that could already serve in the real development of marketing advantages in a specific territory.

Despite the mentioned advantages and contribution points of the dissertation work and processed significant volumes of scientific publications, sources of secondary data, and collected primary data, some discussion points remain in the dissertation. They are concerned with the handling of basic concepts and concepts from the field of marketing theory and their practical application in the design of research instruments and marketing incentives.

## 6. Questions:

Starting from the established discussion points in the dissertation, two more important questions can be asked, through which the author can express her position more clearly:

First question: From the point of view of the marketing development of territories, how can the following perceived limitations be argued:





- When studying the comparative advantages of the territory, why should the comparative advantages of other territories with which the studied territory competes within the same markets and segments be ignored;

- In the study of subjective judgments about the comparative advantages of the territory, why is it not necessary to examine the relationships between the given assessments and other factors that have a direct or indirect impact on their formation?

Second question: Given that territory cannot be defined as a tangible product, what arguments can be used to defend a marketing mix proposal that includes only four sets of marketing incentives?

## 7. Conclusion

The dissertation can be defined as a scientific study of a current and significant issue related to the marketing development of territories. There are also contributing moments developed in a conceptual plan by the author of the dissertation, which can enrich the practice of the marketing development of cities as attractive destinations and places to live and to do business. The dissertation meets the requirements of the regulatory framework, which is why I propose to the members of the esteemed Scientific Jury to make a positive decision on the awarding of the educational and scientific degree "doctor" in the doctoral program "Marketing" to Yana Georgieva Balashova - Stefanova.

03.22.2024.

Reviewer:

(Ass. [redacted], Ph.D.)



ИКОНОМИЧЕСКИ УНИВЕРСИТЕТ ВАРНА

## REVIEW

Вх. № PL20-449/26.03.2024г.

of the dissertation of

Yana Georgieva Balashova-Stefanova

full-time doctoral student

professional field: 3.8. Economy

University of Economics - Varna

**Topic: Marketing development of the comparative advantages of the territory**

**Reviewer: Prof. Hristo Ivanov Katranjiev, PhD**

**UNWE-Sofia**

### I. GENERAL INFORMATION

This review was prepared in compliance with Order No. RD-06-20/02.02.2024. of the Rector of the University of Economics - Varna, to open a procedure for the defense of the dissertation work of Yana Balashova-Stefanova, a full-time doctoral student at the University of Economics - Varna. For this purpose, I have been provided with the relevant materials, including the dissertation work, resume, the cited order, protocols of the doctoral examinations, publications of the doctoral student, etc. All of them individually and collectively fully meet the legal requirements and the current practice of Bulgarian universities.





## **II. DOCTORAL STUDENT DATA**

The doctoral student graduated from the University of Economics - Varna - Bachelor's program in "Accounting and Control" (2002), Master's program in "Corporate Marketing" (2015), as well as Master's program in "English Philology. Linguistics and Translation", acquired at "Bishop Konstantin Preslavski" Shumen University (2021). In 2002, she started working at Kubota America as an accountant, and later as an assistant manager. In 2012, she started working at the University of Economics - Varna as an educational activity inspector at the "Marketing" department, a functional expert on the "Student Practices" project and a coordinator of a joint master's program with Nottingham Trent University. From 2014 to 2021, she was also a part-time assistant in the disciplines: "Marketing", "Marketing Research", "International Marketing", "Distribution Logistics", "Product Management" in "Bachelor" programs of the University of Economics - Varna. Since 2015, she is the founder and chair of the management board of the non-profit association "I am you peace global". Since 2020, she has been working as an English teacher at the Professional Technical High School - Varna. She is fluent in English and Russian, which has helped her in using specialized literature.

## **III. GENERAL PRESENTATION OF THE DISSERTATION**

The dissertation work of doctoral student Yana Georgieva Balashova-Stefanova submitted to me for review has a total volume of 348 pages and is structured in an introduction (7 p.), three chapters (214 p.), a conclusion (4 p.), a list of the literature used (16 p.) and appendices (99 p.). The dissertation contains 16 tables, 29 figures and 18 appendices. The bibliography includes 277 sources (19 of which are online) - in Bulgarian,



English, French and Russian. Three articles and one report are submitted with the dissertation work.

### **III. ASSESSMENT OF THE STRUCTURE AND CONTENT OF THE DISSERTATION**

The dissertation proposed for review on the topic "Marketing development of the comparative advantages of the territory" with author Yana Georgieva Balashova-Stefanova is dedicated to marketing development of the comparative advantages of the territory.

The structure of the dissertation work includes an introduction, three chapters, a conclusion and appendices.

The required components are presented in the introduction, namely: the relevance and significance of the research, the range of practical-applied questions related to the study of the comparative advantages of the territory in its marketing development; subject and object of research; research thesis; research purpose; dissertation research tasks.

The main elements of the first chapter of the dissertation include the following:

- Theoretical review of the marketing of territories;
- Presentation of the comparative advantages of the territories;
- Derivation of prerequisites for marketing development of the territories;
- The importance of marketing development of the comparative advantages of the territory;
- Marketing development of the comparative advantages of the territory - forms.





The second chapter is of a methodological nature and contains the following important elements:

- Technology (in the words of the author - process) of the marketing development of comparative advantages of the territory;
- Methodology for researching the comparative advantages of the territory.
- Model of the study of the comparative advantages of the territory;
- Justification of the choice of the municipality of Varna as a territorial unit for conducting the research.

The third chapter is of an applied nature and is devoted to:

- Testing the research hypotheses;
- Analysis and formulation of comparative advantages based on empirical research among residents of Varna Municipality, visitors to Varna Municipality and local businesses of Varna Municipality;
- Analysis of comparative advantages from the point of view of each studied group;
- Guidelines for marketing development of comparative advantages of the territory are outlined.

In the conclusion, the possibility of applying the technology for identifying the comparative advantages of the territory and determining their importance for different kinds of target groups is considered for each territory.



The object and subject of research are clearly defined and correspond to the research objective.

It can be said that the dissertation meets the requirements laid down in Art. 34, para. 2 and para. 3 of the Regulations for the Development of the Academic Staff at the University of Economics - Varna.

The resume is developed in a volume of 61 pages and faithfully reproduces in a synthesized form the structure and content of the dissertation work. The scientific contributions are explicitly stated. The language is scholarly but understandable. References to literary sources are correct.

## **V. IDENTIFICATION AND EVALUATION OF SCIENTIFIC AND SCIENTIFIC - APPLIED CONTRIBUTIONS IN THE DISSERTATION**

The following indisputable, in my opinion, scientific and scientific-applied contributions can be identified in the dissertation work:

1. Development of technology for marketing development of the comparative advantages of the territory and a conceptual model of their research.
2. Identification of the comparative advantages of the territory of the municipality of Varna and deriving guidelines for their marketing development.





## **VI. PUBLICATIONS AND PARTICIPATION IN SCIENTIFIC FORUMS**

The doctoral student submitted for review a total of 4 publications on the topic of the dissertation: 3 scientific articles and 1 scientific report. All publications are in English and stand-alone (not collaborative).

### ***Scientific articles:***

Balashova-Kostadinova, Y. (2016) Identifying Competitive Advantages for Territories, Bucharest: Bucharest Univ. of Economic Studies Publ. House, pp. 111 - 118, ISSN 2537-5865; ISBN 978-606-34-01108-4.

Balashova-Kostadinova, Y. (2017) Comparative Advantages Related to a Municipality - the Experts View, Bucharest: Bucharest Univ. of Economic Studies Publ. House, pp. 41 - 52, ISSN/ISSN-L 2344-5130.

Balashova-Kostadinova, Y. (2018) Comparative Advantages of Territories - the Residents' View, Bucharest: Bucharest Univ. of Economic Studies Publ. House, pp. 55-68, ISBN 978-606-34-01108-4; ISSN/ISSN-L 2537-5865.

### ***Scientific Reports:***

Balashova-Kostadinova, Y. (2019). Innovative Approaches for Disseminating Territory Information. The Journal of Management and Sustainable Development, 75 (2), pp. 53-59



## **VII. IDENTIFIED OR UNIDENTIFIED PLAGIARISM IN THE DISSERTATION AND THE AUTHOR'S REFERENCE**

In the course of the scientific review of the submitted materials for the purposes of the defense of the dissertation, no evidence was found and/or there were no signals of infringement of copyrights of other researchers at the time of preparation of the review.

## **VIII. CRITICAL NOTES AND RECOMMENDATIONS**

In the first chapter, the doctoral student could pay more serious attention to previous research on the issue. The theoretical aspects could be reduced in favor of critical thinking and systematization of scientific research in the field.

## **IX. QUESTIONS TO THE DOCTORAL STUDENT**

1. Could the doctoral student justify the wording "marketing development of a territory"? Can she suggest substitutes for this statement?

## **X. CONCLUSION**

The dissertation submitted for review is a study of a current and significant issue for both academia and business. The author's contributions in a methodical and methodical-applied aspect enrich the knowledge in the field of marketing and especially in the context of developing marketing strategies for territories. The





dissertation meets the requirements of the Law on the Development of the Academic Staff in the Republic of Bulgaria, as well as in Art. 34 and Art. 35 of Regulations for the development of the academic staff at the University of Economics - Varna, therefore I propose to the members of the esteemed Scientific Jury to award the educational and scientific degree "doctor" in the doctoral program "Marketing" to Yana Georgieva Balashova-Stefanova.

Sofia

25.03.2024

Reviewer:

/prof. dr. Hristo Ivanov Katrandjiev/