

Socio-economic analysis of the regions in Bulgaria

DIGITAL CONNECTIVITY IN THE COUNTRY – STATE OF PLAY

In order to foster completion and support the engagement of local business, the Bulgarian authorities plan to divide the country **to 6 project areas that correspond to the 6 planning regions**. This will allow on one hand to use the possibilities of centralized management of the permit procedures as set in the Spatial Development Act and on the other hand to establish manageable project areas. We are committed to make Bulgarian regions attractive places to live, effectively using their potential for sustainable growth, job creation, business and tourism, with preserved natural and cultural heritage.

For the period 2010-2020, there has been limited progress in bridging interregional disparities in the country. Despite the overall positive trend in all regions by 2020, five of the six regions at level 2 – North-West, North Central, South-East, South Central and North-East continue to be among the ten regions in the EU with the lowest GDP per capita values compared to the EU average.¹ In 2023, the economic activity rate remains below the national average in four of the regions, being higher only in North-West and North-East regions.

Changes in the demographic profile of the country show a persistent trend of population decrease - in the period 2008-2022 of 15.23%. By the end of 2022 the population of Bulgaria is 6 838 937.2 The NSI forecasts confirm the sustainability of the trend - in 2030 the population of Bulgaria is expected to decrease to 6 007 657 people, and in 2040 to 5 637 361 people. It is notable the rapid population decrease in the relatively shorter periods 2008-2011 by 3.72% and 2021-2022 by 5.72%. The population decrease during the period of the National Strategy for Regional Development (2012-2022) is 12%, with a particularly significant decrease in the last year, with about 40% mainly caused by the districts of the North Central Region and the North-East Region.³

The population of all regions of level 2 of the country is decreasing, with the most significant decrease in the period 2011-2022 in the three regions of Northern Bulgaria – North-West -19.7%, North Central -19.6% and North-East -14.4%. The population decrease in the South- West region for the period was 5.4%, followed by the South-East and South Central regions with 11.56 and 11.6% respectively.

By 2020, the North-West and North Central Regions do not meet the requirements of Regulation (EC) No 1059/2003 and are below the lower limit for a NUTS Level 2 region, and in 2030 the population of the North-East Region is also expected to be below the lower limit. (p.44-45 *Final report on the implementation of the national strategy for regional development for the period 2012-2022*) As of 2022, 15 of the 28 districts in the country included in the six regions do not meet the requirements of Regulation (EC) No 1059/2003, according to which the population in administrative units of level 3 should be at least 150 000. These are 4 districts in the North-West Region, 3 districts in the North Central Region, 3 districts in the North-East Region, 1 district in the South-East Region, 2 districts in the South-West Region and 1 district in the South Central Region.

¹ p. 53 Final report on the implementation of the national strategy for regional development for the period 2012-2022 - <https://www.strategy.bg/FileHandler.ashx?fileId=36784>

² p.25 Final report on the implementation of the national strategy for regional development for the period 2012-2022 - <https://www.strategy.bg/FileHandler.ashx?fileId=36784>

³ p.24 Final report on the implementation of the national strategy for regional development for the period 2012-2022- <https://www.strategy.bg/FileHandler.ashx?fileId=36784>

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Statistical regions	Total number of population for the country	In cities	In villages
	6 446 596	4 742 586	1 704 010
North-West	667 763	424 863	242 900
North Central	683 347	455 223	228 124
North-East	825 009	614 806	210 203
Southeast	949 789	684 789	265 000
South West	2 017 861	1 691 076	326 785
South Central	1 302 828	871 829	431 000

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There is a clear need to address future measures more specifically to the particular economic and social problems of the regions, in the context of the common structural development challenges related to their competitiveness and their capacity to offer an attractive and sustainable environment for enterprises and local residents - technical and business infrastructure, functioning institutions, simplification of the business environment, technological readiness, human capital, development of research activities and their link to business, simplification of the business environment, capitalizing on the geostrategic location of each region.⁴

Key to the digitisation of the Bulgarian economy and public services will be the investments to deploy 5G mobile networks in the country. The vision for 5G is more than an evolution of mobile broadband services. These technologies will be a key enabler, contributing to the development of the future digital world as the next generation ubiquitous superfast broadband infrastructures. 5G will support transform processes in all economic sectors (public sector, education, integrated media content delivery, healthcare, research, energy, utilities, manufacturing, transport, automotive, audiovisual technologies, virtual reality (VR), gaming online, etc.) and will provide accessible, flexible, interactive, reliable and highly personalised services that should improve the life of every citizen. 5G for the cities will provide municipalities with a range of solutions for public challenges such as developing sustainable energy management, shaping sustainable mobility to ease the burden on transport infrastructure,

⁴ p.41 Final report on the implementation of the national strategy for regional development for the period 2012-2022 - <https://www.strategy.bg/FileHandler.ashx?fileId=36784>

mitigate the effects of demographic change or maintaining similar living conditions in rural areas. In particular, this means that with 5G, cities and municipalities will be able to deliver services and administration efficiently and effectively. Independent whether for parking management, public transport, traffic management, healthcare, the management of decentralised electricity disposal or municipal waste management, 5G can provide a solution to many of the current challenges. Importantly, the opportunities and challenges of using this technology must be assessed on the basis of integrated and sustainable urban development objectives. Improved connectivity in rural areas. In most rural and remote areas, connectivity to the internet can play a significant role in preventing the digital divide, isolation and depopulation by reducing the cost of delivering goods and services, and partially compensating for remoteness. Businesses can reduce costs by videoconferencing, access to online administration, e-commerce or data storage in the cloud. Rural development and modern agriculture rely on increasingly on online applications supporting tourism, sensor-based crop monitoring and the use of drones in commerce and agriculture. All households, rural or urban, should have access to a minimum level of fixed or wireless connectivity. About to be considered adequate in 2025, connectivity will need to be at a much higher capacity than is currently the case. Building on the Programme's objectives in the area of Digital Agenda for Europe 2020, by 2025 all households should have 100 Mbps connectivity as we continue to develop the path towards providing higher data capacity. There is a growing understanding that broadband internet access is so important, that it should be seen as a utility of first necessity, alongside other utilities such as roads, water, electricity and gas. The positive socio-economic impact of providing access to VHCN also has social effects. Ensuring equal access to broadband infrastructure leads to reducing the economic and social exclusion of individuals and entire communities; and makes them active participants in the society. Significant social effects are expected from improving access to basic public services through the development of e-government, e-education, e-health, etc. The provision of high-speed Internet has a significant impact on increasing security of citizens and society and the reduction of the crimes. As a result quality of life of citizens.⁵

In areas where access to telecommunications is limited, local businesses and populations are disadvantaged. In highly urbanised areas, where users are concentrated, the market will build the infrastructure, as well as the national communications network. In sparsely populated or less economically developed areas, however, the private sector has no economic incentive to build broadband infrastructure and to ensure the development of on-line services.

North-West Region includes the districts of Pleven, Lovech, Vidin, Montana and Vratsa. It's area is 19 070 km². The capital is the city of Pleven. The region has the lowest-ranked economy in Bulgaria and the European Union. It additionally is the least developed planning region of Bulgaria. The region occupies the north-western part of the country and has a favourable geographical location with international transport corridors, including the river Danube. The Danube region has good cross-border opportunities.

The extremely unfavourable demographic situation in the region determines the existence of a number of problems, such as depopulation of the border and mountainous areas,

⁵ p. 201. Socio-economic analysis of the regions in the Republic of Bulgaria. Fourth stage. Part One – 2021

deterioration of the age structure of the population and the quality of the workforce, whose number is constantly decreasing. The relative share of the urban population is lower than the national average.

The North-West is the region with the most significant negative demographic processes, the population decrease has a sustainable trend - in the period 2008-2020, the decrease is 26.4%. By the end of 2020, the population of the North-West Region is 720 172 people. The population of the region as of 2023 is 2 017 861, with 1 691 076 living in urban areas and 326 785 in rural areas. According to the NSI forecasts, by 2025 the population of the North-West Region is expected to be 634 909 people, and in 2030 - to decrease to 583 658 people.

Pleven district covers an area of 4,653.3 km² and has a population of 228 300 people. In Pleven district, there are 11 bigger municipalities and 123 settlements. In 2022, GDP per capita in Pleven district continued its significant growth. Salaries and pensions have been rising relatively fast. Economic activity in the district is extremely slack. Investment is rising.

For the second year in a row, in 2021 the natural population growth rate dropped considerably to reach -18.9‰, against the national average of -13.2‰. Pleven district also fails to attract new residents and the net migration rate is negative (-3.4‰). These processes are the main prerequisite for the high level of population ageing in the district.

The share of households with internet access is rising but remains relatively low - 76.3%, against the average of 83.5% nationally. Utilization of European funds in Pleven district remains close to the national average.

As of 31 December 2022, the population of Lovech district is 113 356 people, which represents 1.8% of the population of Bulgaria and ranks the district 19th place in the country. Compared to 2021, the population of the district decreases by 1 790 people, or by 1.6%. The share of the district's population living in urban areas is relatively low - 61.9%, compared to 73.6% in the country, while the population density in those areas is considerably lower - 774 persons/sq. km, while nationally it is 1,404 persons/sq. km In Lovech district, there are eight bigger municipalities and 110 settlements. Share of urban population is 61.9%. The territory of the district is 4,129 sq. km. GDP per capita, pensions and salaries in Lovech district have been rising but still remain relatively low. Due to the strongly negative natural population growth rate, Lovech is among the districts with a high rate of population aging. The share of the working-age population continues to decline, reaching 54.8%, compared to 58.5% nationally. Utilization of EU funds is relatively high. Share of households with broadband internet access for 2022 - 87.5 % compare to national level of 87.3%.

Vidin district is among the districts with the worst indicators for incomes and quality of life. The population of Vidin district as of 7 September 2021 is 75 408, which represents 1.2% of population of the country (6 519 789). The territory of the district is 3,033 sq. km. In Vidin district, there are 11 bigger municipalities and 141 settlements. The educational structure of the workforce is improving, but unemployment remains extremely high. Investment and business activity is relatively weak, and the infrastructure is not sufficiently developed.

Vidin was once more the district with the most unfavorable demographic conditions in the country. The natural population growth rate fell rapidly and reached its lowest value of -

25.7‰, which is almost half the national average of –13.25‰. At the same time, the district fails to attract population and the net migration rate has again a negative value (–4.4‰), with 2020 as the only year when it had a positive one. One of the major challenges facing the local labor market is population ageing. Household access to the Internet remains low, even though it has risen to 74.8%, compared to 83.5% nationwide.

As a result of the demographic and emigration processes, at the end of 2023, according to the current demographic statistics, the population of Vratsa district is 147 619 people, which represents 2.3% of the population of the country and 22.2% of the population of the North-Western Region. Compared to 2022 it decreases by 1 255 people, or by 0.8%. In Vratsa district, there are 10 bigger municipalities and 123 settlements. The whole district performs poorly in terms of the indicators for infrastructural development. Age dependency ratios are still significantly less favorable than the national averages.

GDP per capita in Vratsa district continues to grow. The average gross annual salary of employees is the third highest in the country. In 2022, employment and unemployment rates went up simultaneously. Vratsa is among the districts with a strong industrial profile and the share of the workforce with secondary education is relatively high. Relative share of households with internet access 67.9%. Households' internet access in Vratsa district also lags behind the country's averages. Vratsa is among the top-ranking districts as regards utilization of EU funding.

Montana district is among the districts with relatively low incomes and quality of life. It covers an area of 3,635.5 km² and has a population of 119,950 according to 2021 census data. In Montana district, there are 11 bigger municipalities and 130 settlements. Trends in the labor market are unfavorable but there is a noticeable improvement in the educational structure of the workforce. Investment activity in the district is relatively low. The continuing tendency towards population aging in the whole of Bulgaria remains particularly conspicuous in Montana district. The natural population growth rate again registered a decline in 2021 and at –23.2‰ (versus –13.2‰ nationally) was the second worst in the country after that in Vidin district. The district fails to attract people and the net migration figure is also negative at –2.9‰. A relatively low share of the population of Montana district lives in urban settlements – 64.0%, versus the national average of 73.1%. Population density in urban settlements is relatively low.

Internet access in the district is increasing but remains relatively low – it is available to 70.2% of households, compared to 83.5% in the country.

North Central Region includes the districts of Veliko Tarnovo, Gabrovo, Razgrad, Ruse, Silistra and there are 36 municipalities, 50 cities and 998 villages. The area of the region is 14 974 sq. km, constituting 13.49 % of the country's territory. The population of the region is steadily decreasing. This is the result of active migration processes and negative natural growth. Population density is below average. The population is unevenly distributed over the territory. As of 31.12.2022, the population of the region is 825 009 people, corresponding to 10.64 % of the total population of the country. The average population density in the North Central Region is 45.84 p.m./km² and is lower than the national average of 58.09 p.m./km². The region has limited opportunities for population and labor force reproduction. The proportion of the population of working age is high compared to the national average.

The North Central Region has 5 universities.

Veliko Tarnovo district covers an area of 4,662 km² and has a population of 204 033 according to 2021 census data. In Veliko Tarnovo district, there are 10 bigger municipalities and 336 settlements.

GDP in Veliko Tarnovo district has been growing at a rate higher than the national average relative to the population. The workforce is among the most highly educated in the country, but population aging is a challenge for the labor market. Investment and business activity in Veliko Tarnovo district is unsatisfactory.

The general trend towards population aging is particularly conspicuous in Veliko Tarnovo district. The number of university students relative to the population is among the highest in the country. A relatively small share of the population lives in urban territories – 69.9%, against the national average of 73.1%. At the same time, the population density of the district's urban settlements remains low at 1,024 persons/sq. km, versus 1,489 persons/sq. km on average for the country. In 2021, the relative share of households with internet access registered a slight increase but remained relatively limited – 81.7%, against the national average of 83.5%.

The territory of Gabrovo district is 2,023 sq. km and has a population of 95 957 (2022). In Gabrovo district, there are 4 bigger municipalities and 349 settlements

Gabrovo is one of the districts whose demographic picture in 2021 was once again among the most unfavorable in the country. The natural population growth rate reached a new negative record at –22.1‰, compared to the national average of –13.2‰, and was the third worst in the country, after that in the districts of Vidin and Montana. In 2021, the net migration rate was also negative, with a rate of –0.8‰. Most of the population of the district is urban – 79.9%, compared to a national average of 73.1%, but its density is relatively low, with 1,191 persons/sq. km, compared to 1,489 persons/ sq. km countywide.

GDP, salaries and incomes in Gabrovo district have continued to grow and the poverty level remains relatively low. Gabrovo is one of the districts with the most unfavorable demographic pictures. The share of the working-age population has declined for yet another year. Business and investment activity in the area is high. Gabrovo has overtaken the capital and is now the district with the highest amount of utilized EU funds per person.

Household access to the internet continues to increase and in 2021 it exceeded the national average – 83.7% in the district, versus 83.5% nationally.

As of 31.12.2023, the population of Razgrad district is 100 696 people, which represents 1.6% of the country's population and ranks the district 23rd in terms of population - just after Yambol district (106.3 thousand people) and before Targovishte district (95.6 thousand people). Compared to the previous year, the district's population decreased by 411 people, or 0.4%. The territory of Razgrad district is 2,488 sq. km. In Razgrad district, there are 7 bigger municipalities and 103 settlements. The natural population growth rate in Razgrad district has been dropping rapidly and in 2021 it was down to –17.3‰, versus the national average of –13.32‰. At the same time, the district fails to attract new residents and the net migration rate is also negative (–1.5‰). Share of urban population is 46.5%.

GDP in Razgrad district continues to grow. The average monthly pension is the lowest in the country. The performance of the labor market in the district is poor, though in the past year there have been some positive trends. Investment activity remains low. The relative share of households with internet access went further up in 2021 to reach 76.6%, though it again remained lower than the average of 83.5% nationwide. Razgrad is among the three districts with under 50% of the population living in urban areas.

The territory of Ruse district is 2,803 sq. km. In Ruse district, there are 8 bigger municipalities and 83 settlements. As of 31 December 2023, the population of Ruse district is 187 830 people, which represents 2.9% of the population of Bulgaria. Compared to 2022. The population of the district decreases by 1 793 people or by 0.9%.

Natural population growth in Ruse district has continued to decline and in 2021 it fell to -17.6‰, against the national average of -13.2‰. However, Ruse is one of the few districts that manage to attract new residents, although its net migration rate is low - 0.3‰. Ruse is among the districts with a high level of urbanization - in 2021 76.9% of the population was living in urban settlements, compared to 73.1% nationally, while the population density was 1,618 persons/sq. km, compared to 1,489 persons/ sq. km in the country. The age dependency ratios in the district remain above the country's average.

GDP per capita in the district has increased and is now the ninth highest in the country. Both employment and unemployment figures remain relatively favorable. The percentage of households in the district with internet access has also increased considerably. It is traditionally higher than the national average - 87.9% compared to 83.5% in the country.

As of September 7, 2021, there are 97,770 people in Silistra district, which is 1.5% of the country's population. The territory of Silistra district is 2,846 sq. km. In Silistra district, there are 7 bigger municipalities and 118 settlements.

Silistra is once again the district with the lowest GDP per capita, despite its relatively high growth rate. The local labor market is still facing the challenge of a disadvantageous educational structure of the workforce and population aging. Silistra is among the regions with very low investment activity. Silistra is among the districts with the worst demographic profile.

The natural population growth rate in Silistra district has continued to deteriorate and in 2021 it registered a considerable decrease to -18.2‰, compared to -13.2‰ in the country. The net migration rate was also negative, although at -0.5‰ it was not too low. Silistra is one of the districts with the urban populations, coming only after Kardzhali district. In 2021, 43.7% of the population was living in urban settlements, against 73.1% countrywide. Population density is twice as low as the national average - 767 persons/sq. km, against 1,489 persons/sq. km countrywide. Access to the internet is available to 79.0% of the households in the district, compared to the average of 83.5% nationwide in 2021.

North-East Region includes the districts of Varna, Dobrich, Targovishte and Shumen. The area of the region is 14 487 sq. km, constituting 13.05% of the country's territory. It is the smallest in area of all the regions in the country. The population of the region as of 2023 is 825 009, with 614 806 living in urban areas and 210 203 in rural areas. The location of the region in the north-eastern part of Bulgaria gives it certain advantages over other regions in northern

Bulgaria. The relief is hilly and flat with many flattened plateaus, which favours the development of agriculture and transport. The birth rate is higher than the national average, which determines the less pronounced negative natural growth. The share of urban population is high - 72.7%.

As of 31 December 2023, the population of Varna district is 434 191 people, which represents 6.7% of the population of Bulgaria and ranks the district third in terms of population after Sofia (capital) (1 287 thousand people) and Plovdiv (634 thousand people), and before Burgas district (384 thousand people). The territory of the district is 3,819 sq. km. In Varna district, there are 12 bigger municipalities and 159 settlements.

In 2021, Varna remained among the top-ranking districts in terms of GDP per capita. Salaries and incomes have continued to grow. Trends in the labor market in 2022 ranked the district second in the country. Investment and business activity again remain relatively high. Utilization of European funding is lagging behind. The district's infrastructure is well developed. Both e-government development and the provision of onestop-shop administrative services are at a high level.

Varna is among the districts with a relatively favorable demographic development. Varna is among the districts with the highest share of urban population – 83.3%, compared to 73.1% in the country, and a relatively high density in the urban areas – 1,800 persons/ sq. km, against the national average of 1,500 persons/sq. km. The relative share of households with internet access has made a huge increase to reach 91.1%, against the national average of 83.5%.

As of 31 December 2023 the population of Dobrich district is 146 635 people, which represents 2.3% of the population of the country. Compared to 2022, the population of the district decreases by 573 or by 0.4%. The territory of the district is 4,720 sq. km. In Dobrich district, there are 7 bigger municipalities and 216 settlements. By 2023, 102,555 people, or 69.9%, live in cities and 44,080 people, or 30.1% of the district's population.

GDP per capita in Dobrich district has continued to grow but its value remains relatively low. At the same time, the relative poverty rate remains high. Investment in the district has been shrinking, but production value has increased.

The urban population remains relatively low – 68.6%, versus 73.1% in the country, and Dobrich continues to be the district with the lowest population density in its urban settlements – 651 persons/sq. km, versus 1,489 persons/sq. km in the country. The relative share of households with internet access in Dobrich district remains relatively low – 68.1%, against the average of 83.5% nationwide.

As of 31 December 2023, the population of Targovishte district is 95 609 people, which represents 1.5% of the population of Bulgaria and ranks the district 24th in terms of population after Razgrad district (100.7 thousand people) and before Gabrovo district (94.9 thousand people). Compared to 2022, the district's population in 2023 decreases by 592 people, or 0.6%. The territory of the district is 2,710 sq. km. In Targovishte district, there are 5 bigger municipalities and 194 settlements.

In 2021, both the value and the growth rate of GDP in Targovishte district were relatively low. The share of the working-age population has been decreasing and moving away from the

national average. A huge challenge for the labor market in the district is the deteriorating educational status of the workforce.

The district's population is aging at a faster rate than in the country. The coverage of the education system in the district is the lowest on a national scale. The degree of urbanization in the district has not changed significantly in recent years and remains among the lowest in the country – 54.3% in Targovishte, compared to 73.1% in the country. Population density in the urban settlements is also relatively low – 1,050 persons/sq. km, compared to 1,489 people in the country on average. There has been an improvement in the population's access to the internet, which within the past three years has exceeded the national average, reaching 88% in 2021, compared to 83.5% in the country.

Shumen district is divided into 10 bigger municipalities and 151 settlements. The territory of the district is 3,390 square kilometres. The terrain in Shumen district is varied, with plains, rolling hills, and mountainous areas. As of 31 December 2023, the population of Shumen District is 149 699 people, which represents 2.3% of the population of Bulgaria and ranks the district 14th in terms of population, just after Sliven (170 051 people) and before Vratsa (147 619 people). Compared to 2022, the district's population increases by 71 people.

GDP, incomes and pensions in Shumen district are continuing to grow. Economic activity is traditionally high and has been increasing further. This increase has been accompanied by a rise in both employment and unemployment. Investment activity remains relatively slack. Shumen is among the best performing districts in the category assessing infrastructure. The self-assessments of the local administrations on the development of e-government and the provision of onestop shop services have gone up.

The natural population growth rate is less favorable than average, but the district has managed to attract new residents. The urban population, as well as population density again remained low in 2021. The share of population living in urban settlements was 60.0%, versus the national average of 73.1%, population density was 873 persons/sq. km, compared to 1,489 people/sq. km on average countrywide. Household access to the internet has increased to 84.6% and remains higher than in the country (83.5%).

South Central Region includes the districts of Plovdiv, Pazardzhik, Kardzali, Haskovo Smolyan. The capital is Plovdiv, the second-largest city in Bulgaria. It is the second most important economical region of the country, which together with the South –West Region region produce almost two thirds of the national GDP. The area of the region is 22 365.1 km² or 20.1% of the country's territory. The territorial structure is as follows: the agricultural territories are 48.1%, the forest - 45.1%, and urban areas occupy only 3.9%. The population of the region as of 2023 is 1 302 828, with 871 829 living in urban areas and 431 000 in rural areas.

GDP per capita in Plovdiv district has continued to grow. The territory of the district is 5,973 sq. km. In Plovdiv district, there are 20 bigger municipalities and 212 settlements. The share of the working-age population is relatively high, but while the unemployment rate is significantly more favorable than the national average, the employment rate is lagging behind.

Investment and business activity has registered a significant growth. The infrastructural development in the district can be assessed as very good.

Against the general trend towards population aging in the country, Plovdiv performs relatively well. The age dependency ratios are favorable. The share of forest areas is equal to the country's average, but that of degraded land is considerably lower. A relatively large share of the district's population lives in urban areas, and in 2021 it reached 75.1%, compared to 73.1% in the country. Plovdiv ranks third after the capital and Sliven as regards population density in its settlements – 2,490 persons/ sq. km, while nationally it is 1,489 persons/sq. km.

The relative share of households with internet access went up in 2021 and remained above the average one nationwide – 88.9%, versus 83.5% respectively.

In Pazardzhik district, there are 11 bigger municipalities and 118 settlements. The territory of the district is 4,457 sq. km. As of December 31, 2022, the population of Pazardzhik District is 226 209 people, which represents 3.5% of the population of Bulgaria and ranks the district 8th in terms of population after Sofia (capital), Plovdiv, Varna, Burgas, Stara Zagora, Blagoevgrad and Sofia (district). Compared to 2021, the district's population decreased by 1,416 people, or 0.6% (in 2021 it was 227,625).

GDP, salaries and pensions in Pazardzhik district have continued to grow, but remain relatively low. 2022 marked a considerable rise of the employment rate, while the unemployment rate remained steady. The educational profile of the workforce remains a challenge for the local labor market. Investment and business activity in the district is not particularly brisk.

In 2021, the natural population growth rate dropped considerably for the second year in a row, reaching –14.0‰ and thus settling below the national figure of –13.2‰. At the same time, Pazardzhik fails to attract new residents, and the net migration rate is also negative at – 1.8‰. The urban population in Pazardzhik district remains relatively low – 62.7%, versus the national average of 73.1%, while the average density of the population living in urban settlements is relatively high – 2,041 persons/sq. km, against 1,489 persons/sq. km on average nationwide. In 2019, the district population's access to the internet continued its rapid rise and remained above the national average – 85.1% in the district, versus 83.5% nationwide.

There are 7 bigger municipalities and 468 settlements in Kardzhali district. The territory of the district is 3,209 sq. km. The population of Kardzhali district as of 7 September 2021 is 141 177. Salaries and incomes in Kardzhali district have been rising considerably, though their levels are still below the respective national averages. Economic activity and employment rates have registered some growth, though they remain below the average ones in the country. Investment and business activity again remains limited.

In 2021, the natural population growth rate in Kardzhali district continued to decrease considerably, though at –11.1‰ it was again higher than the national average of –13.2‰. The district continued to attract new residents and the net migration rate of 12.6‰ was the highest in the country. The share of households with internet access in the district continued to rise in 2021 and even exceeded the national average.

In Haskovo district, there are 11 bigger municipalities and 261 settlements. The territory of the district is 5,533 sq. km. As of 31.12.2023 the population of Haskovo district is 207 114 people. Compared to 2022, the population decreases by 325 people, or by 0.2%. In 2021, both the natural population growth and the net migration rate in Haskovo district registered a decrease. The natural population growth rate dropped to -15.5% , compared to -13.2% nationally. The net migration rate went down but remained positive at 0.4% . The share of people living in cities is comparable to the country's average – 71.7% , versus 73.1% nationally. At the same time, population density is relatively low – 1,027 persons/ sq. km, compared to 1,489 persons/sq. km nationally.

Both the value and the growth rate of GDP per capita in Haskovo district are low. Poverty is declining but is still relatively high. Employment and unemployment are both increasing. Investment activity in the district remains slack. Households' access to the internet improved in 2021, reaching 81.1% in the district, versus 83.5% in the country.

The territory of the Smolyan district is 3,209 sq. km. According to the current demographic statistics, the population of Smolyan district at the end of 2023 is 92 107 people. Compared to the previous year, the population decreases by 1 247 people, or by 1.3% (compared to 0.03% for the country). As of December 31, 2023, 52,817, or 57.3% , of the district's population live in urban areas and 39,290, or 42.7% , live in rural areas. For the country, the percentages are 73.5 and 26.5 , respectively. By the end of 2023, Smolyan district residents live in 240 settlements, of which 8 are towns and 232 are villages.

GDP, salaries and pensions in Smolyan district continue to rise. The poverty level is above average. Employment and unemployment are rising, with both indicators remaining relatively unfavorable. Business and investment activity has been showing some improvement.

The population of the district is among the fastest aging in the country. The district also ranks first with the highest share of forest areas and the lowest share of degraded land.

The urban population in the district is relatively low – 56.9% , against the national average of 73.1% . At the same time, the density of the population remains relatively high – 1,717 persons/sq. km, compared to 1,489 persons/sq. km in the country. Households' access to the internet has registered an increase, but in 2021 it was again lower than the national average – 73.6% in the district, versus 83.5% in the country.

South-East Region includes the districts of Burgas, Stara Zagora, Sliven and Yambol. The South-East Region has been shaped by its favourable geographical position and natural conditions allowing the development of tourism, maritime transport and agriculture, as well as by the relatively more reserved demographic resources compared to other regions of Bulgaria. The region has an area of 14645.1 km², or 13.2% of the country's territory. About 10% of the population of Bulgaria lives there. The population of the region as of 2023 is 1 302 828, with 871 829 living in urban areas and 431 000 in rural areas. The settlement network in the region consists of 486 settlements /26 cities and 460 villages/.

Burgas district is divided into 14 bigger municipalities and 250 settlements. The territory of the district is 7,748 square kilometres. As of December 31, 2023, the population of Burgas district is 384 446 people, which represents 6.0% of the country's population and ranks the

district 4th in terms of population after Sofia (capital), Plovdiv and Varna. Compared to 2022, the district's population will increase by 5 850 people, or by 1.5%.

GDP per capita in the district of Burgas registered a considerable increase in 2021. Levels of income inequality and poverty remain relatively low. In 2022, employment went up and unemployment went down. Investment and business activity in Burgas district is once again among the highest in the country. The demographic indicators place Burgas district among the top four in the country. The demographic indicators place Burgas district among the top three in the country, after only Sofia (capital city) and Varna. The rate of natural population growth is still negative and continues to decline but at -9.9% in 2021 it was still among the highest in the country, while the national average was -13.2% . Burgas district continues to attract new residents as well, with the net migration rate reaching 7.4% , which is the second highest in the country. This also reflects in the age dependency ratios in the district. The share of households with internet connectivity has risen to 82.9% , versus the national average of 83.5% .

The territory of the Stara Zagora district is 5,151 sq. km. There are 11 bigger municipalities and 206 settlements in Stara Zagora district. With 291 852 inhabitants, according to the National Statistical Institute's data from the last census, Stara Zagora district ranks fifth in the country in terms of population, making it one of the largest districts in the country. About 70% of the population lives in cities, although the villages are not depopulated and can boast as many as 83 898 inhabitants, which are even more than the inhabitants of the smallest district in the country - Vidin. Despite the small number of inhabitants in the villages, more than 50% of the population lives in the district centre and in the largest town in Stara Zagora district outside Stara Zagora. Stara Zagora is the fifth largest district in the country not only in terms of population but also in terms of area.

GDP per capita in the district has grown significantly and Stara Zagora now ranks second in this indicator. The performance of the local labor market is relatively good. The figures for investment and business activity place the district among the country's leaders.

The natural population growth in Stara Zagora remains below the national average. Households' access to the internet has been rising, but it remains below the national average – 78.8% , against 83.5% in the country.

There are 4 bigger municipalities and 110 settlements in Sliven district. The territory of the district is 3,544 square kilometres. The population of Sliven district as of 31.12.2023 is 170 051 people or 2.6% of the country's population and ranks the district 13th in terms of population - just after Ruse District (187 830 people) and before Shumen (149 699 people). The downward trend is maintained and compared to the previous year 2022 the population decreases by 532 people or by 0.3% .

Although GDP per capita in Sliven district has been growing, it is among the lowest in the country. The contraction in economic activity is accompanied by a decrease in both employment and unemployment. The labor market continues to face the challenge posed by the educational structure of the workforce. Investment activity is extremely slack.

The demographic conditions of the district rank it among the country's leaders in this indicator.

In 2021, Sliven's demographic picture again placed the district in a leading position in the country. The natural population growth rate went down, but it still remained among the highest in the country at -9.0% (versus -13.2% nationally), while the decrease was among the lowest in the country. At the same time, the district has failed to attract new residents and the net migration rate remained negative (-4.8%). The share of the population living in urban areas is relatively low – 65.2% , compared to 73.1% in the country, but the population density measured as the average number of people per unit settlement area remains the second highest in the country after that in the capital. Digital connectivity is also relatively good – the share of households with internet access was 83.3% in 2021, versus 83.59% nationally.

The territory of the Yambol district is $3,355$ sq. km. There are 4 bigger municipalities and 109 settlements in Yambol district. The population of Yambol district as of 31 December 2022 is 107 379 people, which represents 1.7% of the country's population. In terms of population, the district ranks 22-nd after Kyustendil district (108 703 people) and ahead of Razgrad district (101 107 people). GDP in Yambol district continues to grow at a fast pace. The rate of increase in incomes and pensions also remains stable. The share of the working-age population in the district is one of the lowest in the country. Investment activity remains slack.

Both natural population growth and the net migration rates are unfavorablerate in Yambol district have decreased. The age dependency rates retain their levels, yet remain relatively low. The urban population in Yambol district is lower than in the country – 69.1% , against 73.1% nationally, and so is population density – $1,069$ persons/sq. km, compared to $1,489$ persons/ sq. km countrywide. The share of households connected to high-speed internet has been rising and in 2020 it was equal to the national average – 83.5% .

South–West Region includes the districts of Sofia (capital) and Sofia district, Blagoevgrad, Kyustendil, Pernik. It has an area of $20\,306$ km² and a population of about 2 017 861 people. 1 691 076 people live in cities and 326 785 in villages.

The South West region is the only one region of the country where population numbers have remained relatively stable, with a population decline of less than 1.5% between 2008 and 2020. This is due to population growth in the Sofia (capital) district. The NSI forecasts confirm the sustainability of the trend, the population of the South West region to be below 200,000 by 2025. (p.45 Final report on the implementation of the national strategy for regional development for the period 2012-2022)

The territory of the Sofia (capital) district is $1,341$ sq. km. There are 4 bigger municipalities and 56 settlements in Sofia (capital) district. 20% of the country's population lives in Sofia, which is also the district with the most inhabitants - 1 196 805.

Sofia (capital) has the highest GDP per capita, with a value of more than double the national average and double that of the district ranking second in this indicator – Sofia district. Its labor market is well developed. Sofia is also the undisputed leader in investment activity. The share of households with access to high-speed internet continues to increase.

Sofia is the district with the most favorable demographic conditions. Although the natural population growth rate is negative and is decreasing like elsewhere in the country, it still occupies the top place nationwide with a value of -6.8% , compared to the national average of

– 13.2‰. Sofia (capital) continues to attract new residents and the net migration rate is 6.0‰. The district's specificity accounts for the extremely high level of urbanization – 95.5% of its territory – and the population density is three times the country average – 4,761 persons/sq. km, compared to 1,486 persons/sq. km nationally. The share of households with access to high-speed internet is again very high – 90.3%, compared to 83.5% in the country.

The territory of the Sofia district is 7,062 sq. km. There are 22 bigger municipalities and 286 settlements in Sofia district. As of 31 December 2023, the population of Sofia region is 226 420 people, which represents 3.5% of the country's population. Compared to 2022, the population of the district decreases by 1 190 people, or 0.5%.

Sofia district has recorded the lowest growth rate of GDP per capita, thus losing its second place in the ranking. Salaries and pensions remain relatively high. The development of the local labor market continues to be good. The good economic development in the district is accompanied by high investment activity. The density of its road network is high.

The rate of natural population growth in Sofia district remains below the national average. The district is among those with relatively low level of urbanization. The performance of its students is poor.

The rate of natural population growth in Sofia district continues to fall and remains below the national average at –15.5‰, against –13.2‰ nationwide in 2021. The net migration rate is also negative at – 5.1‰. These processes are reflected in the deteriorating age dependency ratios in the district. Sofia is among Bulgaria's districts with a relatively low level of urbanization – 59.3% of its population is urban, against 73.1% countrywide, and with a low population density of 755 persons/sq. km, compared to the national average of 1,489 persons/sq. km. Access to the Internet in the district remains relatively limited, with 74.1% of the households connected to it, compared to 83.5% on average in the country.

Blagoevgrad district is divided into 14 bigger municipalities and 274 settlements. The territory of the district is 6,449 square kilometres. As of 31 December 2023, the population of Blagoevgrad district is 287 077 people, which represents 4.5% of the population of Bulgaria. Compared to 2022, the population of the district decreases by 1 084 people, or by 0.4%.

GDP per capita in Blagoevgrad district continues to grow relatively fast. At the same time, the growth rates of salaries and pensions are close to the respective national averages. In 2022, employment declined and unemployment went up.

In regard to demographic indicators, Blagoevgrad has achieved relatively good results, although similar to all other districts in the country, the trend towards fast population aging is in evidence here as well. In 2022, the natural population growth rate in the district was –7.5‰, against the national average of –9.7‰. The district continues to attract new residents and its net migration rate is positive. Population aging in the district again remained below the national average in 2022. A relatively small share of the population lives in urban settlements – 59.8%, against the national average of 73.6%. At the same time, the population density in the district's urban settlements remains relatively high at 2,166 persons/sq. km, versus 1,404 persons/sq. km on average in the country. The relative share of households with internet access in Blagoevgrad district in 2022 again remained below the national average.

The territory of the Kyustendil district is 3,052 sq. km. There are 9 bigger municipalities and 182 settlements in Kyustendil district. The population of the district is 108 703 people.

GDP per capita in Kyustendil district has been growing but remains below the national average. Economic activity and employment rates have registered a considerable increase. Investment activity in the district is among the lowest in the country.

Kyustendil is among the districts with the highest rate of population aging, preceded only by Vidin, Gabrovo, and Smolyan in this indicator. Demographic development in Kyustendil district is among the weakest in the country. The rate of natural population growth has continued its rapid decrease and in 2021 it reached -22.0% (against -13.2% in the country). Like almost all districts, in 2020 Kyustendil managed to attract settlers and the mechanical growth rate was positive for the first time in at least two decades. However, this trend did not prove to be permanent and in 2021 it was again negative, with a value of -5.7% . The urban population is 69.7%, which is close to, but below the national average of 73.1%, but population density is relatively low – 1,078 persons/sq. km, against 1,489 persons/sq. km in the country on average. Households' internet access in the district rose sharply and in 2021 it was 77.3%, compared to the national average of 83.5%.

In Pernik district, there are 6 bigger municipalities and 171 settlements. The territory of the district is 2,394 sq. km. The population of the municipality in 2022 is 111 746. Share of urban population is 78.1%

Salaries and pensions in Pernik district continue to rise and the poverty level remains low. Investment activity in the district is relatively slack.

Age dependency continues to deteriorate. The natural population growth rate in Pernik district has continued to decline. 2020 was yet another year of considerable decrease, reaching -22.1% , compared to the national average of -13.2% . The net migration rate has dropped but remains positive (1.1%). The rapid rate of population ageing in the district is also evident in the age dependency ratios. The urban population is relatively high – 78.1%, versus 73.1% countrywide, but its density is low – 904 persons/sq. km, compared to 1,489 persons/sq. km in the country. The relative share of households with internet access registered a considerable increase and in 2021 it came close to the national average – 82.8% in Pernik district, versus 83.5% nationally.

HOUSEHOLD INTERNET ACCESS (PERCENTAGES)	
Total	88.5
By statistical region	
North-West	82.6
North Central	85.4

HOUSEHOLD INTERNET ACCESS (PERCENTAGES)	
North-East	86.5
South-East	87.5
South-West	92.8
South Central	87.8
By place of residence	
In cities	91.8
In villages	77.0
By household type	
Households without children	87.1
Households with children	97.7

1. North-West Region:

Demographics and Geography: Comprises 51 municipalities with a population of 667 763 spanning an area of 19 070 km².

Network Penetration:

Mobile network area with 4G capacity - 10 - 100 Mbps – 703,23 km²

Mobile network area with 4G capacity – 100 - 1000 Mbps – 11 552,19 km²

Mobile network area with 5 G - over 1Gbps capacity – 436,56 km²

Fixed network area with up to 100 Mbps capacity - 3,13 km²

Fixed network area with 100 - 300 Mbps capacity - 17,89 km²

Fixed network area with 300 - 1000 Mbps capacity - 11,69 km²

Fixed network area with over 1Gbps capacity - 246,54 km²

- 4G coverage with speeds between 10 - 100 Mbps affects only 8% of the area, while the higher speed bracket of 100 - 1,000 Mbps covers 90%.
- 5G technology, offering speeds over 1 Gbps, is emerging modestly at 2%.

2. North Central Region:

Demographics and Geography: Includes 36 municipalities, hosting a population of 683 347 over 14 974 km².

Network Penetration:

Mobile network area with 4G capacity - 10-100 Mbps – 555,14 km²

Mobile network area with 4G capacity - 100-1000 Mbps – 10 298,25 km²

Mobile network area with 5 G - over 1Gbps capacity – 448,20 km²

Fixed network area with up to 100 Mbps capacity - 0 km²

Fixed network area with 100 - 300 Mbps capacity - 95,96 km²

Fixed network area with 300 - 1000 Mbps capacity - 19,04 km²

Fixed network area with over 1Gbps capacity - 236,92 km²

- 4G services at the lower speed tier cover 6% of the region, whereas the higher tier covers 91%.
- 5G coverage is slightly better than in the Northwestern Region at 3%.

3. North-East Region:

Demographics and Geography: Contains 35 municipalities, with a population of 825 009 spread across 14 487 km².

Network Penetration:

Mobile network area with 4G capacity - 10 - 100 Mbps – 623,07 km²

Mobile network area with 4G capacity - 100 - 1000 Mbps – 9 844,78 km²

Mobile network area with 5 G - over 1Gbps capacity – 670,27 km²

Fixed network area with up to 100 Mbps capacity - 0 km²

Fixed network area with 100 - 300 Mbps capacity – 14,12 km²

Fixed network area with 300 - 1000 Mbps capacity – 7,71 km²

Fixed network area with over 1Gbps capacity – 227,91 km²

- The region enjoys a 7% coverage for 4G at 10 - 100 Mbps and 88% for 100 - 1,000 Mbps.
- 5G accessibility is at 5%, indicating a gradual adoption of advanced network technology.

4. South- East Region:

Demographics and Geography: Encompasses 33 municipalities with a total population of 1 302 828 in an area of 14 645,1 km².

Network Penetration:

Mobile network area with 4G capacity - 10 - 100 Mbps – 1 753,67 km²

Mobile network area with 4G capacity - 100 - 1000 Mbps – 15 090,49 km²

Mobile network area with 5 G - over 1Gbps capacity – 852,76 km²

Fixed network area with up to 100 Mbps capacity – 1,87 km²

Fixed network area with 100 - 300 Mbps capacity – 11,75 km²

Fixed network area with 300 - 1000 Mbps capacity – 16,96 km²

Fixed network area with over 1Gbps capacity – 225,15 km²

- 4G coverage stands at 11% for speeds of 10 - 100 Mbps and 85% for speeds of 100 - 1,000 Mbps.
- There is a 4% penetration of 5G, reflecting slow but steady progress in infrastructure development.

5. South-West Region:

Demographics and Geography: The largest in terms of population, this region includes 52 municipalities with 2 017 861 residents over 20 306 km².

Network Penetration:

Mobile network area with 4G capacity - 10 - 100 Mbps – 2 279,56 km²

Mobile network area with 4G capacity - 100 - 1000 Mbps – 10 678,39 km²

Mobile network area with 5 G - over 1Gbps capacity – 904,32 km²

Fixed network area with up to 100 Mbps capacity – 2,57 km²

Fixed network area with 100 - 300 Mbps capacity – 10,55 km²

Fixed network area with 300 - 1000 Mbps capacity – 24,99 km²

Fixed network area with over 1Gbps capacity – 426,46 km²

- It has the highest coverage of lower-tier 4G at 18%, but lower high-speed 4G coverage at 77%.
- 5G technology is available to 4% of the area, paralleling the national push towards enhancing high-speed connectivity.

6. South Central Region:

Demographics and Geography: Mirroring the Southwestern Region, it comprises 58 municipalities but with a smaller population of 1 302 828 across a larger area of 22 365,1 km².

Network Penetration:

Mobile network area with 4G capacity - 10 - 100 Mbps – 2 131,73 km²

Mobile network area with 4G capacity - 100 - 1000 Mbps – 13 601,82 km²

Mobile network area with 5 G - over 1Gbps capacity – 859,35 km²

Fixed network area with up to 100 Mbps capacity –16,08 km²

Fixed network area with 100 - 300 Mbps capacity –16,335 km²

Fixed network area with 300 - 1000 Mbps capacity – 30,26 km²

Fixed network area with over 1Gbps capacity – 257,31 km²

- Coverage for 4G (10 - 100 Mbps) is at 16%, and for 100 - 1,000 Mbps at 81%.
- The region matches the national average with a 4% coverage of 5G networks.

As seen from the regional coverage mapping results, the variable degrees of network coverage across Bulgaria's regions highlight significant disparities that need addressing to bridge the digital divide. The gradual rollout of 5G, coupled with the robust presence of high-speed 4G, sets a foundation, but accelerated efforts are essential to equip all regions with high-capacity networks that support Bulgaria's aspirations for a fully connected and digitally inclusive society.