

Development of the Bulgarian Transport Market after the Country's Accession to the European Union

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Abstract: Transport plays a key role in the economic, social and societal development of the country, as it is a necessary condition for the normal functioning of all economic sectors. The national transport market is a sphere of demand and supply of transport services and related capacities for the purpose of spatial movement of passengers and goods. This report analyzes the dynamics of demand for freight and passenger transport in various modes of transport after the country's accession to the European Union. Trends in the quantities of transported goods and the transport work performed are tracked and analyzed. The analyzed period (2007 - 2024) covers the time after the country's accession to the European Union and ends in a period of global geopolitical instability after the global health crisis caused by the COVID-19 pandemic. The eighteen-year period examined allows us to track the main trends in the development of the national transport market and, on this basis, to make recommendations for its sustainable future development.

Keywords: national transport market, freight and passenger transport, search for transport services

JEL: R41

1. INTRODUCTION

Transport is one of the main sectors of the Bulgarian economy, and its functioning requires specialized transport infrastructure, a fleet of vehicles and the organization of the entire transport activity. Freight transport ensures the supply of raw materials to manufacturing enterprises and the transportation of finished products from the place where they are produced to consumers. It is an important factor in the rhythmic and timely supply of both manufacturing enterprises with materials and raw materials, and the trade network with goods to meet the daily needs of the population. In passenger public transport, vehicles (buses, trolleybuses, trains, ships, airplanes, etc.) are used to transport a large number of passengers simultaneously and usually move along certain routes, according to a previously announced schedule (Gatovski, 2022). The use of public transport undoubtedly leads to a reduction in the harmful impact on the environment, which contributes to achieving the European Union's goals for the decarbonization of the economies of the Member States (the Green Deal).

Changes in the global economy have led to changes in the demand for transport services, which are a consequence of economic development. The transport market in Bulgaria as a whole can be described as very dynamic, and the non-constancy comes

from a variety of directions. The geopolitical problems between Russia and the European Union have closed otherwise attractive destinations for Bulgarian transport carriers. At the same time, due to the ongoing military operations in the Middle East, transport entrepreneurs have significant difficulties in carrying out transport to and from this region. The stability of transport between European countries has led to the redirection of some of the transport companies, which until now preferred transport to third countries, to the intra-community market. This has made the European transport services market even more competitive, and the battle for market share has become increasingly fierce (Dimitrov, 2016).

The functioning of the transport system is based primarily on the fact that each mode of transport has specific features that determine the sphere of its effective use (Nikolova, 2010). Under the conditions of a market economy, self-regulation of the national transport market takes place to a significant extent, which arises from the clash between the desire of transport companies for the most efficient organization of transport activities and the requirements of shippers for high-quality and inexpensive transport.

2. DEVELOPMENT OF THE FREIGHT TRANSPORT MARKET

2.1. Analysis of transported cargo quantities.

Data on the amount of transported goods by transport modes for 2007 - 2024 are presented in Table 1. The largest amount of goods throughout the period was transported by road, followed by pipeline, rail and water transport, and the smallest amount of goods was transported by air transport. At the beginning of the period under review, the total amount of transported goods initially decreased significantly, but then gradually began to increase, with an increase of 1851 thousand tons in 2017 compared to the initial year 2007, followed by a significant decrease in 2019, reaching a total amount of transported goods of 96675 thousand tons. After the onset of COVID-19 in 2020, a significant increase was observed in the amount of transported goods by all modes of transport, except for pipeline, which in 2021 transported 2927 thousand tons less than in the pre-pandemic year 2019. The increase in the total amount of transported goods continues in 2023, although smaller quantities of goods were transported by rail in 2023 than in the previous year under consideration, 2021 (Dimitrov, 2024), and for 2024 a significant decrease in the total quantities of transported goods is reported, due to the smaller quantities of goods transported by road and rail. For the period under review, an increase in the transported quantities of goods was recorded in road, pipeline and air transport, respectively by 5572 thousand tons, 748 thousand tons and 13 thousand tons, while a decrease in the transported quantities of goods was reported in water and rail transport, respectively by 11806 thousand tons and 6262 thousand tons. The total amount of transported cargo for the period under review decreased by 11735 thousand tons from 134834 thousand tons in 2007 to 123099 thousand tons in the last year under review, 2024.

At the beginning of the period under review, road transport registered a serious decline in the transported quantities of goods, reaching 54700 thousand tons in 2009, followed by a period of gradual growth over the next eight years, reaching 91640 thousand tons in 2017, which is 19484 thousand tons more than the initial year of 2007. For 2019, a

serious decline in the transported quantities of goods was again reported, followed by an increase, and for the last year under review, 77728 thousand tons of goods were transported by road.

Tab.1 Transported cargo quantities for the period 2007-2024 (thousand tons)

	2007	2009	2011	2013	2015	2017	2019	2021	2023	2024
Road	72156	54700	58884	79398	85234	91640	5998 2	86290	92207	77728
Rail	21905	13284	14152	13539	14635	16030	1494 8	18069	17105	15643
Water	16854	9948	5900	3031	1867	2291	2376	3992	4777	5048
Air	2	19	8	4	5	9	20	31	17	15
Pipeline	23917	19095	22395	24556	23757	26715	1934 9	16422	21998	24665
Total:	134834	97046	10133 9	120528	125498	136685	9667 5	124804	13610 4	12309 9

Source: NSI

At the beginning of the period, railway transport recorded an extremely serious decline in the quantities of transported goods, reaching 13284 thousand tons in 2009, followed by a gradual increase over the next eight years, reaching 16030 thousand tons in 2017. For the period 2009-2024, railway transport maintained relatively constant levels of transported goods, and for 2021 and 2023, an increase in transported goods was recorded.

During the first half of the period under review, water transport recorded a very serious decrease in the quantities of transported goods, reaching 1867 thousand tons in 2015 compared to 16854 thousand tons at the beginning of the period under review. During the second half of the period, transported goods by water transport gradually increased, reaching 5048 thousand tons in 2024.

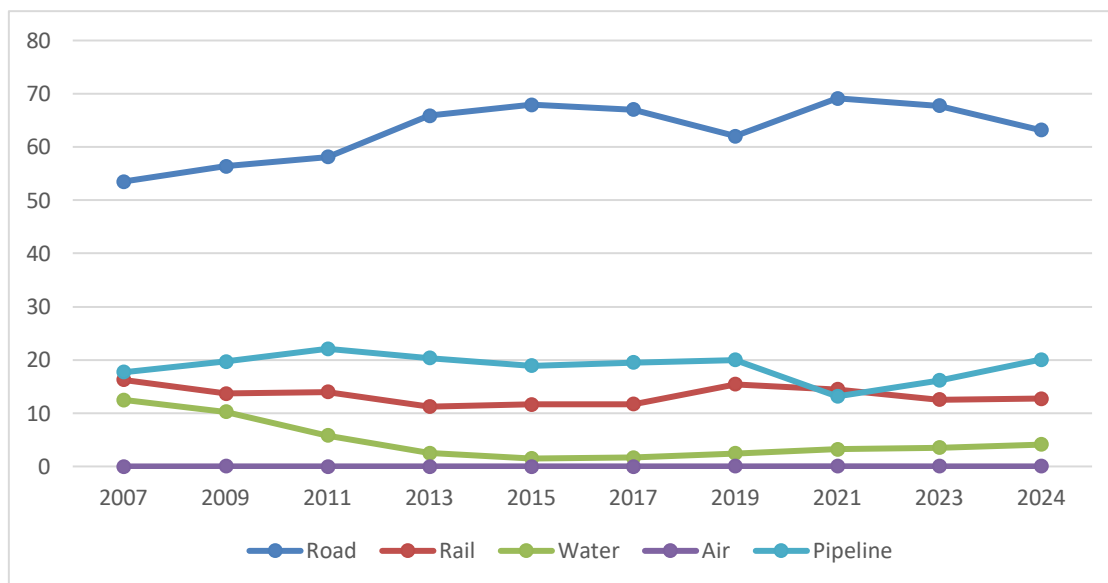
Air transport transports an extremely small part of the total amount of transported goods in the country's transport system. For the period under review, the transported amounts of goods by air transport increased from 2 thousand tons in 2007 to 15 thousand tons in 2024, and the highest amount of goods, 31 thousand tons, was transported in 2021.

For the period under review, pipeline transport ranked second after road transport in terms of the amount of transported goods. It maintained relatively constant levels of transported goods, registering significant decreases in 2009, 2019 and 2021. For 2021, the least transported amounts of goods by pipeline transport were reported for the period under review, 16422 thousand tons.

Figure 1 presents data on the percentage ratio of transported goods by different modes of transport. The highest relative share is road transport, which during the period under review transported between 53.51% and 69.14% of the total amount of transported goods. In second place is pipeline transport with between 13.16% and 22.10% of the goods transported, and in third place is railway transport with between 11.23% and

16.24% of the total amount of transported goods. At the beginning of the period under review, 12.50% of the quantities of transported goods were transported by water transport, and at the end of the period they decreased to 4.10%, with the lowest share of water transport in the quantities of transported goods being reported in 2015, respectively 1.49%. The role of air transport in the quantities of transported goods is insignificant, with between 0.01% and 0.03% of the total amount of transported goods being transported by air for the period under review.

Fig.1 Transported cargo quantities for the period 2007-2024 (%)



Source: NSI and author's calculations

Over the entire period under review, road transport transported over half of the total amount of transported goods on the transport market. Its share for the period increased from 53.51% in 2007 to 63.14% in 2024. About one fifth of the total amount of transported goods was transported by pipeline, and for 2024 its share was 20.04%, which is a 2.30% increase compared to the initial year under review, 2007. The remaining types of freight transport reported a decrease in their percentage share in the transported amounts of goods for 2024 compared to the initial year 2007, with a decrease of 3.54% for rail transport and 8.40% for water transport.

2.2. Analysis of the freight transport work performed

Table 2 presents data on the volume of transport work performed by different modes of transport for the period 2007 - 2024. During the first half of the period under review, road transport relatively evenly increased the volume of transport output, reaching 32187 million tkm in 2017 from 11795 million tkm in the initial year 2007. In 2019, a significant decline was reported, reaching 17504 million tkm, followed by significant growth during the pandemic period with 30116 million tkm in 2021. In the last year under review, 2024, freight road transport performed 23514 million tkm of transport work, which is 11719 million tkm more than in the initial year under review, 2007.

The work performed by freight rail transport at the beginning of the period under review significantly decreased, then remained at relatively constant levels until the onset of the COVID-19 pandemic, when a significant increase in the transport work performed was registered. At the end of the period, rail transport performed 4369 million tkm of transport work, which is 872 million tkm less than in the initial year under review, 2007.

Tab.2 Work performed by types of freight transport for the period 2007-2024 (million tkm)

	2007	2009	2011	2013	2015	2017	2019	2021	2023	2024
Road	11795	1387 1	17943	23530	28742	32187	17504	30116	28431	23514
Rail	5241	3145	3291	3246	3650	3931	3902	4658	4555	4369
Water	68991	4588 5	18684	4612	1107	1218	1188	1147	723	1040
Air	4	10	7	4	5	8	16	19	23	13
Pipeline	5129	3761	4560	4773	4285	5188	3256	4861	6555	7880
Total:	91160	6667 2	44485	36165	37789	42532	25866	40801	40287	36816

Source: NSI

Water transport registered an extremely serious decline in the volume of transport activity performed on the national transport market from 68991 million tkm in 2007 to 1040 million tkm in the last year under review, and in 2023 it performed the smallest volume of work (723 million tkm).

The participation of air transport in the cargo transport activity performed on the national transport market is insignificant. For the period under review, it increased the volume of work performed by 9 million tkm, from 4 million tkm in 2007 to 13 million tkm in the last year under review, 2024.

Pipeline transport performs a relatively constant volume of transport work until 2019, when it reports a serious decrease in the produced transport output, and in 2023 and 2024, the levels of the volume of transport activity not only recover, but also exceed the values reported at the beginning of the period under review.

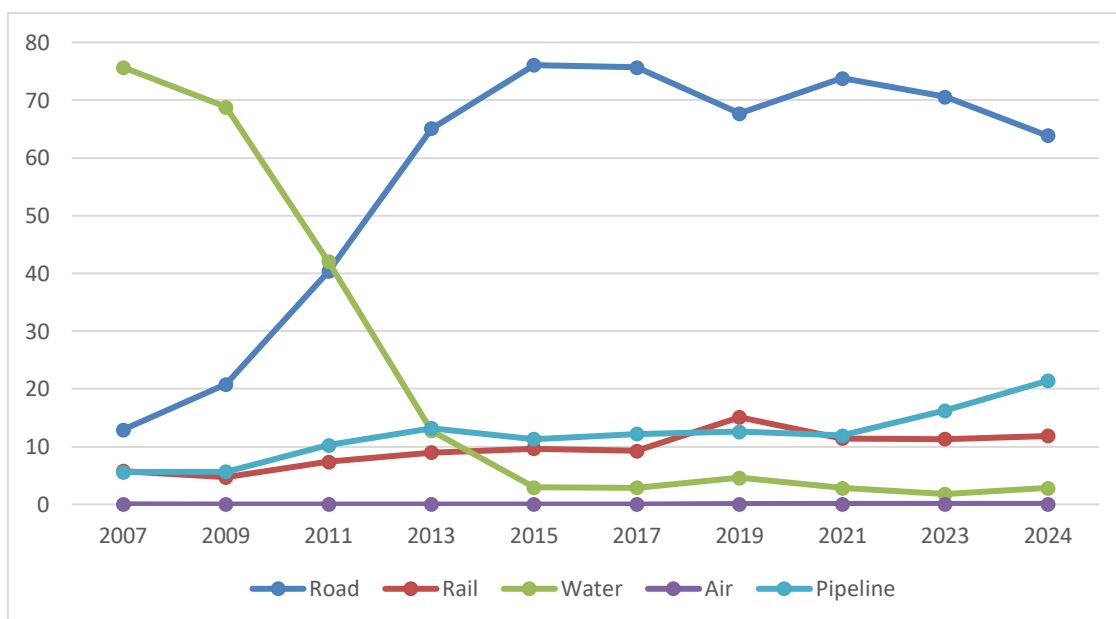
Data on the percentage distribution of the performed freight transport activity by different modes of transport for the period 2007 - 2024 are presented in Figure 2. During most of the analysis period, road transport carried the main part of the total volume of freight transport output, with its highest relative share being reported in 2015 (76.06%). Road transport for the period 2007 - 2024 significantly increased its share in the volume of work performed on the national transport market by 50.93% (from 12.94% in 2007 to 63.87% in 2024). Pipeline transport is after road transport in terms of the volume of work performed on the transport market, although its percentage share in the total volume of work performed varies widely, but still at the end of the period under review a significant growth of 15.78% was recorded compared to the initial year 2007.

Railway transport for the period under review increases its market share in the produced freight transport output, having performed 11.87% for 2024, and 5.75% for the initial year under review 2007, which is equivalent to a growth of 6.12%. Water transport

for the period 2007 - 2024 significantly reduces its share in the volume of work performed on the national transport market by 72.86% (from 75.68% in 2007 to 2.82% in 2024). The participation of air transport in the total volume of work performed on the national transport market is insignificant, varying during the period under review between 0.01% and 0.06%.

There is a certain change in the structure of transported goods and work performed at the end of the period under review compared to the initial year. The relative share of road transport as a whole in the transport of goods increased by 9.63% for the entire period, and in terms of the work performed, the growth was even more impressive and reached levels of 50.93%. This growth became possible on the basis of restructuring by transport modes both in terms of transported goods and performed work, which were visibly reduced in water transport and from levels of transported goods of 12.50% in 2007, gradually reached 1.49% in 2015, and the work performed from 75.68% at the beginning of the period marked a significant decline and in the last observed year was 2.82% (Figure 2). The reasons for this change can be localized around the unsatisfactory state of the sea and river fleet and the port infrastructure, which are the basis for the declining functions of water transport in Bulgaria. This trend is unfavorable from the point of view of the European Union's intentions to create conditions for achieving balance in the transport structure of the community by tolerating the development of water transport.

Fig.2 Work performed by types of freight transport for the period 2007-2024 (%)



Source: NSI and author's calculations

In parallel with the increase in the market share of road transport, the positions of railways are weakening, which are slowly but surely reducing the volumes of transported goods and work performed, despite the increasing competition. Pipeline transport, in turn, is experiencing some fluctuations in terms of transported goods and work performed, but they are within narrow limits and in general it can be assumed that it maintains its stability.

The dominant position of road transport is considered as a clear negative for the national transport system by the European Union, which supports the achievement of relative equality between the individual modes of transport (Arnaudov & Gatovski, 2023). This is because each transport option has its advantages and disadvantages and optimal levels of their exploitation must be pursued, which is assumed by the balanced participation of all modes of transport.

3. DEVELOPMENT OF THE PASSENGER TRANSPORT MARKET

3.1. Analysis of transported passengers

The number of passengers transported by mass public transport is one of the main quantitative indicators with which the demand for passenger transport on the national transport market can be measured. Table 3 presents data on the number of passengers transported by different modes of transport for the period 2007 - 2024. The largest number of passengers throughout the period under review were transported by road transport, followed by urban electric transport, railway transport and air transport, and the smallest number of passengers were transported by water transport.

Tab.3 Passengers carried for the period 2007-2024 (thousands of passengers)

	2007	2009	2011	2013	2015	2017	2019	2021	2023	2024
Road	594879	536448	487946	426763	442244	445332	446185	290467	333179	340769
Rail	33283	31360	29308	26072	22526	21203	21339	17147	21822	21150
Water	243	240	175	143	115	109	102	152	275	264
Air	2237	2184	2693	2269	2240	2198	2693	603	2451	1646
Urban electric transport	293794	286252	280181	269448	248081	279654	268799	191815	267122	318703
Total:	924436	856484	800303	724695	715206	748496	739118	500184	624849	682532

Source: NSI

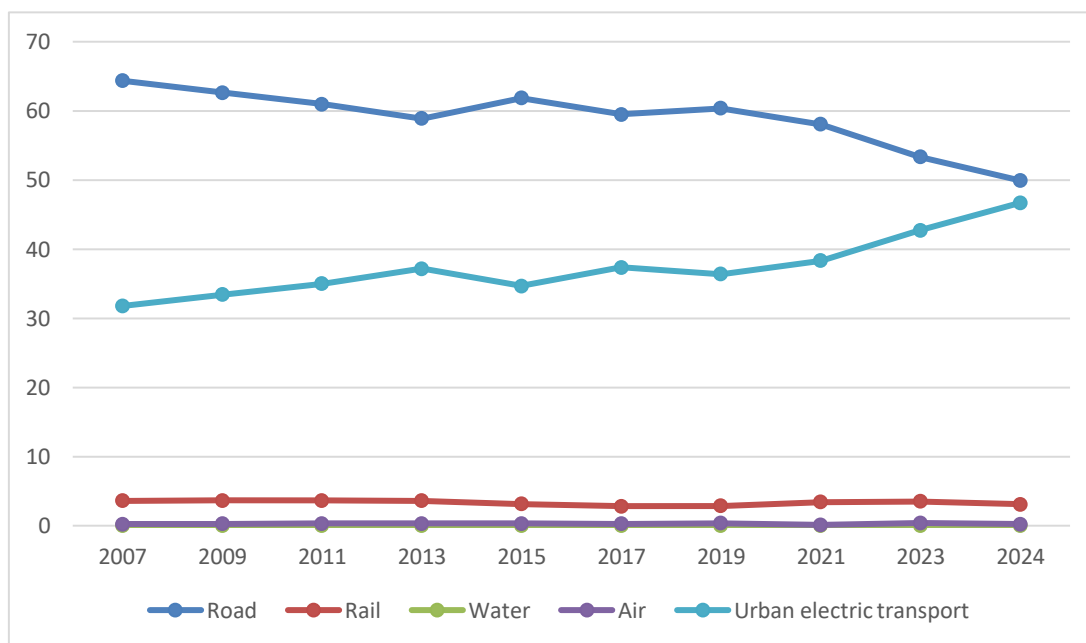
At the beginning of the period under review, the total number of passengers transported by public transport decreased significantly, followed by a period of relatively constant levels that lasted until 2019. After the onset of the global health crisis caused by the COVID-19 pandemic, a significant decrease was observed in the total number of passengers transported by public transport. For 2021, compared to the pre-pandemic year 2019, a serious decrease in the number of passengers transported in all modes of transport was reported. The trend of a decrease in the total number of passengers transported changed at the end of the period under review, with a total of 624849 thousand passengers and 682532 thousand passengers transported in 2023 and 2024, respectively, which is 124665 thousand passengers and 182348 thousand passengers more than in 2021 (NSI, 2025). Despite the reported growth at the end of the period under review, the total number of passengers transported was 56586 thousand passengers less than the pre-pandemic year 2019 and 241904 thousand passengers less than the initial

year under review 2007. The most significant decrease in the number of passengers transported was registered in road transport, where in the last year under review 2024, 254110 thousand passengers were transported less than the initial year under review 2007 and 105416 thousand passengers less than the pre-pandemic year 2019 (Infostat, 2025). The remaining modes of transport at the end of the period under review restored the levels of the number of passengers transported to their pre-pandemic values, and urban electric transport even increased the number of passengers transported and for 2024 reported 24909 thousand more passengers transported compared to the initial year under review, 2007, and 49904 thousand more passengers transported compared to 2019.

Water (sea and river) transport performs a minor part of passenger transport, and due to its specific characteristics, it mainly carries out trips for tourist purposes.

Data on the percentage ratio of the number of passengers transported by different modes of transport for the period 2007 - 2024 are presented in Figure 3.

Fig.3 Passengers transported for the period 2007-2024 (%)



Source: NSI and author's calculations

Throughout the period under review, more than half of the passengers using mass public transport are transported by road. However, its share decreases from 64.35% in 2007 to 49.93% in 2024. Air transport initially slightly increases its percentage share in the number of passengers transported during the period under review, reaching from 0.24% in 2007 to 0.36% in 2019, followed by a serious decline to 0.12% in 2021. For the last year under review, 2024, air transport transported 0.24% of the total number of passengers transported by public transport, which is equal to its percentage share from the initial year under review, 2007. A significant increase is recorded only in the percentage share of urban electric transport, which at the end of the period transported 14.91% more than the total number of passengers transported by public transport. The remaining modes of

passenger transport at the end of the period under review reported relatively constant levels of their percentage participation in the number of passengers transported compared to the initial year 2007.

3.2. Analysis of the work performed by passenger transport

The highest share in the volume of passenger transport work performed on the transport market in Bulgaria is reported by road transport, followed by air, rail and urban electric transport (MTITC, 2017). The passenger transport activity performed by the various modes of transport for the period 2007 - 2024 is presented in Table 4. At the beginning of the period under review, the total volume of passenger transport activity performed on the transport market in Bulgaria decreased from 20963 million passenger kilometers in 2007 to 18009 million passenger kilometers in 2019. Following the onset of the global health crisis caused by the COVID-19 pandemic, passenger transport activity has significantly decreased in all types of public transport, with the total volume of transport production registering a decrease of 9474 million passenger kilometers (from 18009 million passenger kilometers in 2019 to 8535 million passenger kilometers in 2021). In 2023, a slight increase in the total volume of transport work performed is reported, mainly due to the increase in transport activity performed in road and air transport.

Tab.4 Work performed by passenger transport type for the period 2007-2024 (million pkm)

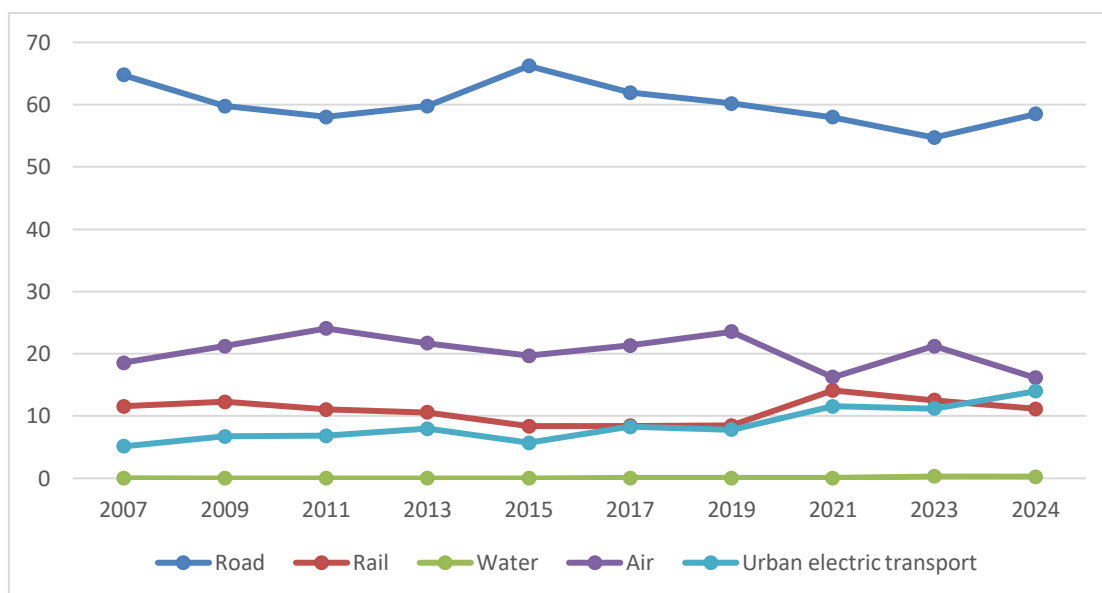
	2007	2009	2011	2013	2015	2017	2019	2021	2023	2024
Road	13572	10451	10843	10317	12257	10553	10836	4950	6956	7875
Rail	2423	2144	2067	1826	1552	1438	1524	1205	1596	1501
Water	1	1	2	2	2	5	10	6	37	35
Air	3892	3713	4496	3738	3644	3637	4234	1386	2698	2173
Urban electric transport	1075	1173	1276	1375	1058	1412	1405	988	1427	1882
Total:	20963	17481	18684	17258	18513	17045	18009	8535	12714	13466

Source: NSI

At the end of the period under review, a significant increase in the total volume of transport work performed was reported, mainly due to the reported increase in the number of passengers transported and the greater average distance traveled per passenger. In 2024, a total of 13466 million passenger kilometers were produced on the passenger transport market in Bulgaria, which is 4931 million passenger kilometers more than in 2021 (NSI, 2025), but is still significantly less than the pre-pandemic year 2019 (4543 million passenger kilometers) and the initial year of the period under review (7497 million passenger kilometers). Only in urban electric transport was there an increase in the passenger transport work performed in 2024 compared to the pre-pandemic year 2019, equivalent to an increase of 477 million passenger kilometers. The remaining types of passenger transport in 2024 still produce a smaller volume of transport output compared to the pre-crisis year 2019.

Figure 4 presents data on the percentage distribution of passenger transport activity performed between the different types of transport. The bulk of the reported passenger kilometers during the period under review were produced by road and air transport. The leading position is occupied by road transport, followed by air, rail and urban electric transport. The reason why urban electric transport ranks fourth in terms of work performed (despite its second position in terms of the number of passengers carried) is that in this type of transport, transportation is carried out over significantly shorter distances compared to other types of transport. In road and rail transport, a persistent trend of decreasing the volume of work performed was observed during the period under review, which is mainly due to the decrease in the number of passengers carried (Arnaudov, 2022). Air and urban electric transport, with slight fluctuations, maintained constant levels of the volume of transport work performed by them during the period under review.

Fig.4 Work performed by passenger transport type for the period 2007-2024 (%)



Source: NSI and author's calculations

After the onset of the COVID-19 pandemic, all types of passenger transport, except for road and air transport, registered an increase in their percentage share in the transport output produced on the passenger transport market in Bulgaria. The most serious growth in 2021 compared to the pre-pandemic year 2019 was reported in railway and urban electric transport with 5.66% and 3.77% respectively, followed by water transport with a growth of only 0.01%. Air transport in 2021 carried out only 16.24% of the total volume of passenger transport activity, while for the pre-pandemic year 2019 its share was 23.51%. During the pandemic, there was a serious decline in the share of air transport, and in the last year under review, 2024, it has not yet recovered and has a share of 16.14% of the total volume of passenger transport activity performed on the transport market.

For the period under review 2007 - 2024, all types of passenger transport reported a decrease in their percentage share in the production of the transport market, with the exception of urban electric transport and water transport, which reported a growth of

8.85% and 0.26%, respectively. Water passenger transport recorded a significant growth throughout the period under review, but its market share is insignificant and it does not affect the total volume of passenger transport activity performed on the national transport market. The total volume of passenger transport activity performed on the transport market during the period under review is lower than the initial year under review, but the most significant decrease was registered in 2021, when only 40.71% of passenger kilometers were produced compared to the initial year 2007. The serious decrease is mainly due to the decrease in passenger transport activity performed by road, air and rail transport. In 2023 and 2024, the total volume of transport output in passenger transport on the transport market begins to increase compared to the values registered in the pandemic year 2021, but is still significantly lower than pre-pandemic levels, which is mainly due to the delayed recovery in passenger transport activity carried out by road transport.

4. CONCLUSION

The modern global economic world is remarkably dynamic, large-scale and in this aspect dependent on the adequacy of transport solutions. The Bulgarian transport sector must be strongly adaptive to the latest trends in the industry in order to regain competitive positions and derive maximum economic benefit from the favorable geographical prerequisites for its development.

The volatility of the transport market does not allow us to deduce a single general trend for it, but the transport sector is definitely among those most affected by geopolitical problems. The consequences of the tightening of our relations with Russia, related to the war in Ukraine, are most clearly reflected in transport companies relying on transport from and to Russian markets. The stability of transport between European countries has led to the redirection of some of the transport companies, which until now preferred transport to third countries, to the intra-community market. The transport market of the European Union is estimated at a total value of over one trillion euros, but due to the great interest in it, the expectations are that it will become less and less profitable. The creation of a pan-European transport area for the free movement of people and goods implies both the necessary technological compatibility between different modes of transport and new rules for access to and use of infrastructure. The liberalization of the economy and the withdrawal of the state from direct participation in economic life does not mean that it should reduce its regulatory function between different modes of transport (Slavova-Nocheva, 2012). A favorable perspective is that transport operators increasingly rely on technological solutions and connectivity between systems (similar to couriers), so that the customer can see where his cargo is at any time. It can be summarized that for the period under review, road transport carried more than half of the passengers transported by mass public transport and it produced over half of the passenger transport output on the national transport market. The demand for passenger transport on the transport market during the period under review is influenced by many factors such as the age structure, the solvency and mobility of the population, demographic processes, the economic and political situation, etc. The global health crisis caused by the COVID-19 pandemic has had an extremely negative impact on the demand for passenger transport services. During the

pandemic, there has been a decline in the number of passengers carried and the transport output produced in all modes of transport, with the most serious reduction being recorded in air, road and urban electric transport. After the pandemic, demand for public passenger transport has recovered to pre-COVID-19 levels in all modes of transport except road transport. The unrecovered demand for public road transport is the reason why the total volume of passenger transport services performed in 2024 will be lower than its pre-pandemic values.

In passenger transport, the main problems leading to the decrease in the number of passengers carried and the work performed by transport enterprises are mainly rooted in the serious demographic crisis and the depopulation of settlements (villages and cities). These problems are very difficult to solve and require serious commitment from the state, not only in relation to the transport sector, but also in determining its overall policy.

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