

# Comparative report

## Skills Gap Analysis in the Agritourism Sector

**Project title:** AgriVETourism Project - Enhancing Sustainable Agritourism through Vocational Education and Training for Rural Development

**Project Reference:** 2024-2-BG01-KA210-VET-000267044

**Activity 4:** VET Curriculum Design – Comparative report

**October 2025**



**Co-funded by  
the European Union**

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## TABLE OF CONTENTS

<b>1. INTRODUCTION</b> -----	<b>3</b>
<b>1.1 Project Context and Objectives</b> -----	<b>3</b>
<b>1.2 Research methodology</b> -----	<b>3</b>
<b>1.3 Overview of research process</b> -----	<b>4</b>
<b>1.4 Profile of assessed Agritourism facilities</b> -----	<b>4</b>
<b>2. COMPARATIVE ANALYSIS OF AGRITOURISM CONTEXT</b> -----	<b>5</b>
<b>2.1 Agritourism development status</b> -----	<b>5</b>
<b>2.2 Policy and Regulatory Frameworks</b> -----	<b>5</b>
<b>3. SKILLS GAP ANALYSIS ACROSS COUNTRIES</b> -----	<b>6</b>
<b>3.1 Methodology and assessment framework</b> -----	<b>6</b>
<b>3.2 Comparative analysis of skill gaps</b> -----	<b>6</b>
<b>3.2. Common gaps</b> -----	<b>8</b>
<b>3.3. Country-specific gaps</b> -----	<b>8</b>
<b>3.4. Synthesis of training preferences</b> -----	<b>9</b>
<b>4. COLLECTION OF BEST PRACTICES</b> -----	<b>9</b>
<b>4.1 Overview of the identified best practices</b> -----	<b>9</b>
<b>4.2. Exemplary best practices</b> -----	<b>10</b>
<b>5. VET Curriculum recommendations</b> -----	<b>11</b>
<b>5.1. Overall aim and target audience</b> -----	<b>11</b>
<b>5.2. Pedagogical methodology and delivery</b> -----	<b>11</b>
<b>5.3. Proposed modular structure</b> -----	<b>12</b>
<b>5.4. Detailed module descriptions</b> -----	<b>12</b>
<b>5.5. Assessment and recognition</b> -----	<b>14</b>
<b>6. CONCLUSIONS</b> -----	<b>14</b>
<b>7. REFERENCES</b> -----	<b>15</b>



# 1. INTRODUCTION

## 1.1 Project Context and Objectives

The AgriVETourism project (2024-2-BG01-KA210-VET-000267044) aims to enhance the sustainability and competitiveness of agritourism operations across Europe through comprehensive Vocational Education and Training. This comparative report synthesises findings from national research conducted in Bulgaria, Italy, and Greece between July and September 2025, analysing skill gaps and best practices across 15 agritourism facilities. Based on the researched data, this report provides the evidence-based foundation for designing a VET curriculum that reflects the real-world needs of agritourism operators located in the researched countries.

The project responds to the European Union's priorities under the Common Agricultural Policy 2023-2027 and the Green Deal objectives, recognising agritourism as a vital component of rural development, economic diversification, and cultural preservation. With rural areas facing challenges of depopulation, seasonal employment, and climate adaptation, strengthening the capacity of agritourism operators becomes essential for sustainable rural futures.

## 1.2 Research methodology

The findings in this report are based on a qualitative research phase conducted by the project partners in their respective countries (Bulgaria, Greece, and Italy) between July and September 2025. Each partner followed the project's Implementation Guidelines to carry out field assessments, including:

- **Qualitative interviews** using standardised assessment tools covering nine thematic areas
- **Field observations** documenting operational practices and infrastructure
- **Thematic analysis** identifying patterns across environmental, economic, and social dimensions related to agritourism development in target counties.

The core of the methodology consisted of structured interviews with 15 agritourism facilities in total (5 in each country). Participating facilities were selected to ensure diversity in their size, services, and operational focus. Operators were interviewed using a common 40-minute structured guide to systematically cover nine assessment areas (e.g., environmental practices, economic viability, digitalisation), identify specific skill gaps, and document best practices.



### 1.3 Overview of research process

**In Bulgaria** (Municipality of Petrich), five facilities in southwest Bulgaria were analysed and interviewed, demonstrating strong value-added production and emerging renewable energy adoption, but facing significant bureaucratic barriers and limited formal training opportunities.

**In Italy**, the project partner Marea identified and interviewed representatives of five facilities across various regions, showcasing advanced multifunctionality and circular economy practices, yet struggling with certification complexity and the complete absence of renewable energy implementation.

iAgroCert – a project partner from **Greece**, identified five facilities emphasising cooperative models and export orientation, with notable gaps in digital presence and systematic environmental management despite strong cultural heritage integration.

### 1.4 Profile of assessed Agritourism facilities

The 15 facilities assessed represent a wide spectrum of agritourism operations:

- **In Bulgaria**, the sample included five diverse, independent producers focused on value-added products: a winery (Zlaten Rozhen), a traditional livestock farm (Paralovi's Farm), an almond and tahini producer (BIOVAS), a saffron cultivator (KesarLife), and a comprehensive ethno-village (Ethno Village Dolene).
- **In Italy**, the five facilities represent highly advanced, multifunctional models integrating agriculture with tourism, education, and social innovation. The sample included a farm protecting native breeds (Valle del Vesuvio), an operation focused on urban regeneration and wellness (Giardino dell'Orco), an enterprise that accessed RDP funds for sustainable innovation (Masseria Fontana dei Fieri), an advanced "zero waste" circular economy model (Vannulo), and a farm specializing in "lemon tours" and local partnerships (Tenuta di Leva).
- **In Greece**, the sample profile was unique, consisting primarily of large-scale **agricultural cooperatives** and producers rather than individual farm-stays. The facilities included a sustainable fertiliser producer (Sidiropoulos Fertilisers), a winery (Simeonidis Estate Winery), and three major cooperatives (A.C. Koulouras, Kosmos, GESPOV) focused on education, export, and waste valorisation.



## 2. COMPARATIVE ANALYSIS OF AGRITOURISM CONTEXT

### 2.1 Agritourism development status

The three countries represent different stages of the agritourism sector development:

**Italy** leads with 26,129 active agritourism businesses (2023), generating €1.87 billion in revenue and welcoming 4.5 million visitors annually. The sector benefits from specific agritourism legislation, established quality standards, and strong integration with regional gastronomy and wine tourism. However, mandatory training programs focus on bureaucratic compliance rather than practical skills. The Italian model is defined by its strong legal framework, high multifunctionality (offering accommodation, food, and diverse activities like wellness and workshops), and a deep commitment to quality certifications like PDO/IGP.

**Greece** shows steady growth with agritourism concentrated in Central Macedonia, Peloponnese, and Crete. The sector has grown from small, family-run initiatives into a key pillar of rural development, often linked to specific products like olive oil, wine, and beekeeping. While it is a driver of preserving traditional knowledge, its success often depends on EU development programs. Like Bulgaria, it faces significant challenges with "bureaucratic barriers, fragmented regulation, and insufficient marketing capacity". Recent INSETE data confirms visitor preferences shifting toward authentic, experiential offerings.

**Bulgaria** represents an emerging market where agritourism remains "relatively fast-growing and newly-established." Despite favourable natural conditions and CAP funding allocation (€5.6 billion for 2023-2027), the sector lacks a clear national framework specifically for agritourism. Its growth is hindered by inadequate rural infrastructure, a shortage of qualified personnel, and complex bureaucracy that discourages certification.

### 2.2 Policy and Regulatory Frameworks

A common thread across all three partners is the alignment of agritourism with the EU Common Agricultural Policy (CAP) 2023-2027, positioning it as a key strategy for sustainable rural development and economic diversification.

In this regard, at the national level, each country is prioritising sustainability, digitalisation, and rural vitality. However, implementation varies significantly:

- **Italy:** Comprehensive agritourism law with regional specifications, but excessive bureaucracy limits innovation



- **Greece:** Fragmented governance between tourism and agricultural ministries creates operational confusion
- **Bulgaria:** No dedicated agritourism framework; operators navigate between tourism and agricultural regulations

While voluntary certifications exist (organic, PDO/PGI, eco-labels), adoption remains limited due to:

- Perceived complexity and cost (all countries)
- Neighbor contamination issues preventing organic certification (Italy, Bulgaria)
- Lack of awareness about certification benefits (Greece).

### 3. SKILLS GAP ANALYSIS ACROSS COUNTRIES

#### 3.1 Methodology and assessment framework

Skills gaps were assessed across nine thematic areas using a standardised typology:

- **Technical (T):** Agricultural practices, environmental management, energy systems
- **Business (B):** Financial planning, marketing, certification processes
- **Soft Skills (S):** Hospitality, communication, cultural interpretation

Priority levels were assigned based on frequency (facilities mentioning) and operational impact:

- **High (H):** Critical for immediate sustainability
- **Medium (M):** Important for quality enhancement
- **Low (L):** Beneficial for long-term development

#### 3.2 Comparative analysis of skill gaps

The following table synthesises the skills gaps identified across all 15 facilities in Bulgaria, Greece, and Italy. The "Frequency" column now represents the total number of facilities (out of 15) that mentioned a specific gap, providing a clear transnational picture.

Assessment area	Skills Gaps Identified	Type*	Frequency**	Priority***	Possible training topic
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<p><b>Economic viability</b></p> <p>Financial management, business planning, EU funding access, pricing, product transformation and value-added production, obtaining quality certifications (PDO, PGI)</p>	Lack of knowledge in financial management, business planning, and accessing EU/national funding.	B, T/B/S	10/15	H	Financial management, business planning, EU funding access, pricing strategies, value-added production.
<p><b>Digitalization and communication</b></p> <p>Appropriate use of social media, use of e-commerce, and stakeholders engagement</p>	Lack of knowledge of social media, e-commerce, and digital marketing tools. Limited online presence.	B/T, T/B/S	11/15	H	Appropriate use of social media, e-commerce, digital marketing, online stakeholder engagement.
<p><b>Certifications</b></p> <p>Quality standards, eco-labels, documentation, compliance</p>	Difficult to access due to bureaucratic procedures. Low adoption and perceived complexity (eco-labels, quality standards).	T, B	12/15	H	Quality standards, eco-labels, documentation, compliance, and certification processes.
<p><b>Energy use</b></p> <p>Renewable energy knowledge, efficiency measures, funding for green energy</p>	Lack of knowledge of renewable energy options, efficiency measures, and funding for green energy.	T/B/S, B/T	10/15	M-H	Renewable energy knowledge, efficiency measures, and funding options.
<p><b>Agricultural practices</b></p> <p>Sustainable farming, organic production, biodiversity, pest management</p>	Need for training in organic/regenerative farming. Dependence on informal/empirical knowledge.	T	8/15	H	Sustainable/organic/regenerative farming, agronomy, and evidence-based practices.
<p><b>Community engagement</b></p> <p>Partnership building, local supply chains, cooperative marketing</p>	Lack of knowledge about cooperative marketing. Weak cooperation with local stakeholders and weak territorial marketing.	B, S/B	8/15	H	Cooperative and territorial marketing, community partnerships, stakeholder engagement.
<p><b>Visitor experience</b></p> <p>Hospitality, customer service, educational programs, authentic experiences</p>	Lack of knowledge in designing educational programs and authentic experiences. Limited hospitality training.	B/S, S	6/15	M-H	Educational programs, authentic experience design, hospitality skills, storytelling.
<p><b>Environmental practices</b></p> <p>Waste management, recycling, water conservation, circular economy principles</p>	Lack of knowledge in waste management, water	T, T/B/S	6/15	M-H	Waste/water management, circular economy principles, composting.

	conservation, and circular economy.				
<b>Cultural preservation</b> Heritage knowledge, traditional practices, cultural interpretation	Underutilization of local heritage in tourism experiences.	S	3/15	<b>L-M</b>	Cultural interpretation, local identity promotion.
<b>Social responsibility</b> Inclusive practices, accessibility, fair employment, ethical operations	Limited inclusion and accessibility for vulnerable groups.	S	2/15	<b>L</b>	Inclusive tourism and accessibility awareness.

\*Type: T (technical), B (business), S (soft skills) \*\*Frequency: Total number of facilities mentioning the gap (out of 15) \*\*\*Priority: Synthesised transnational priority (H=High, M=Medium, L=Low)

### 3.2. Common gaps

The analysis of the 15 facilities reveals a clear consensus on the most critical training needs. These are widespread, high-priority gaps shared across all three countries:

- **Certifications (12/15):** This is the most frequent gap. Operators universally find the process for obtaining any certification (organic, quality, eco-label) to be overly complex and bureaucratic.
- **Digitalisation and communication (11/15):** A critical, high-priority gap. Operators lack practical skills in using digital tools for marketing, social media, and e-commerce.
- **Economic viability (10/15):** A core high-priority need. Operators lack knowledge in financial management, business planning, and how to successfully access EU and national funding.

### 3.3. Country-specific gaps

While the gaps above are universal, some high-priority needs were more prominent in specific countries:

- **Greece and Italy:** In both countries, a high-priority need for formal training in sustainable/organic agricultural practices was identified to move beyond informal, empirical knowledge.
- **Bulgaria:** The research highlighted a specific high-priority gap in designing visitor-facing experiences, such as educational programmes.
- **Greece:** The Greek report uniquely identified environmental practices (waste/water management) as a high-priority, high-frequency gap (4/5 facilities).



### 3.4. Synthesis of training preferences

There is a very strong consensus among all partners on the required pedagogical approach. Agritourism businesses are busy and will not attend long, theoretical courses. Therefore, the planned VET programme must be:

- **Flexible and practical:** All partners advocate for a format that is compatible with seasonal agricultural work. In Italy, interviewees specify "short, focused workshops", while in Bulgaria they suggest "how-to" sessions and practical clinics.
- **Blended (Hybrid):** In both Greece and Bulgaria, interviewed representatives of agritourism businesses explicitly propose a blended model that combines self-paced online modules for flexibility with on-site, in-person sessions for practical application.
- **Experiential and peer-based:** The training must be practical. In Greece, participants suggest "experiential and project-based learning"; in Italy, they recommend "encounters with experts," and Bulgarian agritourism operators emphasise "peer-to-peer learning" using successful local farms as mentors.

## 4. COLLECTION OF BEST PRACTICES

### 4.1 Overview of the identified best practices

The 15 field assessments revealed a rich collection of established best practices across all three countries. Despite their varying business development and market presence, the majority of the identified agritourism operators are successfully implementing innovative, sustainable models. These practices can be grouped into five key themes:

1. **Productive and functional diversification:** This is the most universal best practice. Successful facilities have moved beyond simple agriculture to integrate multiple revenue streams, including accommodation, restaurants, and direct sales. This is seen in Bulgaria with value-added products like cosmetics (KesarLife) and dairy (Paralovi's Farm), and in Italy with advanced multifunctionality, combining farming with educational farms, wellness, and cultural events.
2. **Circular and low-impact approaches:** Many advanced facilities have adopted circular economy principles. This includes recycling residual products for fertilisation (Zlaten Rozhen, BG), converting fruit waste into fertilisers (GESPOV, GR), and "zero waste" closed-loop production cycles (Vannulo, IT). This theme also includes the implementation of renewable energy, such as the photovoltaic park at Zlaten Rozhen (BG).



3. **Valorisation of territorial and cultural heritage:** Operators create a unique value proposition by linking their products and services directly to their local identity. This includes preserving native grape varieties (Zlaten Rozhen, BG), protecting native animal breeds (Valle del Vesuvio, IT), and creating entire tourism experiences based on traditional architecture and local recipes (Ethno Village Dolene, BG).
4. **Experiential and educational tourism:** Instead of passive stays, successful operators engage visitors directly. This is seen in wine tourism and harvest events (Simeonidis Estate, GR), "lemon tours" (Tenuta di Leva, IT), and participatory farm activities (Paralovi's Farm, BG). Several facilities in Italy and Greece are also recognised as formal educational farms.
5. **Cooperation and community engagement:** The research highlighted that successful operators build strong local networks. This includes prioritising local employment (Zlaten Rozhen, BG), collaborating with local stakeholders and tour operators (Tenuta di Leva, IT), and formal cooperative models that provide education and support to local farmers (A.C. Koulouras, GR)

## 4.2. Exemplary best practices

The following examples from the research serve as excellent, tangible case studies that can be directly integrated into the VET curriculum:

- **Advanced circular economy (Italy): Vannulo** demonstrates a "zero waste," closed-loop organic model. It integrates buffalo farming, in-house forage production, a dairy, an ice cream shop, a bakery, and even a leather workshop. It uses milking robots for animal welfare and technology for traceability, representing a gold standard in multifunctionality.
- **Cooperative innovation and education (Greece): The A.C. Koulouras Cooperative** serves as a model for community engagement. It actively supports local farmers, organises educational programmes for youth, and promotes rural entrepreneurship and gender-inclusive participation, showing how cooperation can drive social innovation .
- **Holistic sustainability and cultural preservation (Bulgaria): Ethno Village Dolene** represents an integrated ecosystem. It combines comprehensive environmental sustainability (waste management, water conservation, organic farming) with deep cultural preservation (restored traditional houses, local food varieties, farm-to-table restaurant), creating an authentic, holistic experience.
- **Collaborative R&D and innovation (Italy): Masseria Fontana dei Fieri** demonstrates a high level of innovation by participating in an EU project on energy efficiency alongside universities and tech companies. This shows



an openness to external collaboration and scientific research to improve sustainability.

## 5. VET Curriculum recommendations

The following recommendations are based on the most common high-priority skill gaps, country-specific needs, and preferred learning styles identified in the 15 field assessments across Bulgaria, Greece, and Italy.

### 5.1. Overall aim and target audience

The **overall aim** of the VET curriculum is to support the sustainability and competitiveness of agritourism operations by equipping operators with practical, modern skills in business management, digital marketing, and sustainable practices. The curriculum is designed to be flexible, learner-centred, and directly address the real-world needs identified during the field research.

The **direct target audience** for the training are the project's primary target groups: **rural working-age adults and existing agritourism facility operators** who wish to enhance their skills in sustainable agriculture and tourism management.

The **ultimate beneficiaries** are future **VET students** who will receive training based on these identified needs, as well as the broader agritourism sector that will benefit from a new generation of better-trained, sustainable operators.

### 5.2. Pedagogical methodology and delivery

Based on the strong consensus from all partner reports, a traditional, theoretical-only course is unsuitable. The delivery methodology must be:

- **Blended (Hybrid):** The programme will combine flexible online, self-paced modules (for theory and concepts) with in-person, practical workshops (for applied skills).
- **Practical and applied:** Training must be based on "how-to" sessions, practical clinics, and project-based learning rather than abstract theory.
- **Experiential and peer-to-peer:** The in-person workshops should be hosted at successful facilities, using experienced operators, peer mentors, and sector experts to share tangible knowledge.
- **Flexible and modular:** The content will be broken into modules, allowing operators to focus on the specific skills they need and learn at a pace compatible with seasonal agricultural work.



### 5.3. Proposed modular structure

The analysis of transnational skill gaps revealed **five core priority areas**. We propose a curriculum structured around the following five topics:

- **Sustainable Business and Financial Management**
- **Digital Marketing and Innovation**
- **Certification, Quality, and Value-Added Production**
- **Sustainable Agriculture and Environmental Operations**
- **Visitor Experience and Community Engagement**

### 5.4. Detailed module descriptions

The following modular structure addresses the topics in the identified five priority areas:

#### **Module 1: The 'Business' in Agritourism: Planning, Finance, and Funding** (proposed title)

- **Objective:** To equip operators with the fundamental financial and strategic skills to build a resilient and profitable business.
- **Rationale:** This module addresses the high-priority, transnational gap in "Economic Viability," specifically the lack of knowledge in financial planning and accessing funding.
- **Key topics:**
  - Financial management and business planning for agritourism.
  - Pricing strategies for products and services.
  - Navigating EU and national funding opportunities (CAP, LEADER, RDP).
  - Revenue diversification strategies (drawing on best practices).
- **Expected learning outcomes:** Learners will be able to create a simple business plan, identify relevant funding streams, and implement effective pricing strategies.

#### **Module 2: The 'Market' in Agritourism: Reaching Guests with Digital Tools** (proposed title)

- **Objective:** To develop essential digital competencies to enhance market visibility, manage customer relations, and automate tasks.
- **Rationale:** This addresses the critical, high-frequency gap in "Digitalisation and Communication" and integrates the proposal for practical AI tools.
- **Key topics:**
  - Digital marketing foundations (social media, branding).



- Setting up and managing e-commerce and online booking tools.
- Using Generative AI for content creation (e.g., blog posts, social media updates).
- AI for customer service (e.g., simple chatbots for common inquiries).
- **Expected learning outcomes:** Learners will be able to manage a professional online presence, create engaging digital content, and use simple AI tools to save time and improve customer service.

### **Module 3: The 'Product' in Agritourism: Quality, Certification, and Value** (proposed title)

- **Objective:** To provide practical knowledge to navigate complex certification procedures and leverage quality labels to add value.
- **Rationale:** This module directly targets the most frequent gap identified: the perceived complexity and bureaucratic barriers of "Certifications".
- **Key topics:**
  - Navigating national and EU certification schemes (organic, eco-labels, quality standards).
  - Step-by-step guidance on documentation and compliance.
  - Fundamentals of value-added production (processing, packaging, branding).
  - Marketing and pricing certified products (e.g., PDO/PGI).
- **Expected learning outcomes:** Participants will be able to identify the right certification for their facility, manage the application process, and understand how to market their value-added products.

### **Module 4: The 'Agri' in Agritourism: Sustainable Farming and Operations** (proposed title)

- **Objective:** To formalise and upgrade technical knowledge in sustainable farming and environmental management.
- **Rationale:** This module addresses the high-priority gap identified in Greece and Italy for formal training in "Agricultural Practices" and the transnational gaps in "Energy Use" and "Environmental Practices".
- **Key topics:**
  - Sustainable, organic, and regenerative farming principles.
  - Waste management and circular economy applications.
  - Water conservation and management techniques.
  - Renewable energy solutions and funding for green efficiency.
- **Expected learning outcomes:** Operators will be able to implement and monitor practices that reduce environmental impact, lower operational costs, and align with EU Green Deal priorities.



## Module 5: The 'Tourism' in Agritourism: Creating Authentic Guest Experiences (proposed title)

- **Objective:** To develop skills in creating authentic, high-value visitor experiences and building strong local partnerships.
- **Rationale:** This addresses the high-priority gaps in "Visitor Experience" and "Community Engagement".
- **Key topics:**
  - Design of authentic visitor experiences (e.g., educational programmes, farm tours).
  - Hospitality, storytelling, and cultural interpretation skills.
  - Building local supply chains and partnerships.
  - Cooperative and territorial marketing strategies.
- **Expected learning outcomes:** Participants will learn to transform their facilities into unique destinations, increase visitor satisfaction, and build strong local networks for cooperative growth.

### 5.5. Assessment and recognition

To ensure the programme is practical and learner-centred, assessment will be based on application rather than theory.

- **Self-assessment:** Each online module will conclude with self-assessment questions to check for understanding.
- **Practical portfolio:** Learners will complete small, practical exercises for each module (e.g., "Draft a 1-month social media content calendar" or "Identify one funding call suitable for your business").
- **Final project:** To complete the programme, learners will develop a "Sustainable Agritourism Business Canvas" for their own facility, integrating learnings from all five modules.
- **Recognition:** Successful completion of the programme (all modules and the final project) will result in a Certificate of Completion from the AgriVETourism project partners, outlining the skills and modules covered.

## 6. CONCLUSIONS

The comparative analysis of agritourism sector development across Bulgaria, Italy, and Greece reveals a sector rich in potential yet constrained by systematic skill gaps in digitalisation, financial management, and sustainable practices. The research showed that the most urgent needs are not in agriculture itself, but in business management, digital marketing, and navigating bureaucracy. Operators across all three countries struggle with accessing funding, marketing themselves



online, and completing the complex processes for quality and environmental certifications.

The five-module VET curriculum proposed in this report is a direct, evidence-based response to these identified gaps. By focusing on practical business skills, digital tools, and certification, while also reinforcing sustainable agriculture and hospitality, the curriculum will provide operators with the skills they need. The recommended blended, peer-to-peer learning model will ensure this training is flexible, accessible, and engaging for busy rural entrepreneurs

Implementation of these recommendations will equip a new generation of agritourism professionals with competencies to navigate complex regulatory environments, leverage digital opportunities, and create authentic experiences that benefit both visitors and rural communities. The path forward requires moving beyond traditional agricultural training toward holistic education that recognises agritourism's role in sustainable rural development.

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