

## PEER REVIEW

by **Prof. Dr. Lubomir Mintchev Stefanov**, University of National and World Economy – Sofia, Department “Human Resources and Social Protection”, professional field 3.8 “Economy”, member of Scientific Jury in the competition for academic position “PROFESSOR”, approved by a decision of the Scientific Council minutes No 3 on 20.03.2019, and by an order of the Director No 78 on 25.03.2019, announced by Economic Research Institute at Bulgarian Academy of Sciences, SG, issue 8 on 25/01/2019

Candidate: **Assoc. Prof. Dr. Irena Kirilova Zareva-Zafirova**

### *I. Short biography of the candidate*

The only candidate in the competition – Assoc. Prof. Dr. Irena Zareva-Zafirova was born on 26.03.1964. She graduated from the University of National and World Economy – Sofia, majoring in “Socio-Economic Planning”. In 2009, Prof. Zareva-Zafirova was awarded the educational and scientific degree “Doctor” at Economic Research Institute at Bulgarian Academy of Sciences.

Since 1988, Assoc. Prof. Dr. Zareva-Zafirova has worked at Economic Research Institute at Bulgarian Academy of Sciences (successively as a research fellow III, II and I degree, Assoc. Prof. since 2012), she was scientific secretary of Department “Macroeconomics”, scientific secretary (since 2016) and Deputy Director of Economic Research Institute at BAS (since 1917).

### *II. General characteristics of the scientific and applied work of the candidate*

#### *1. General description of the submitted materials (monographs, textbooks, articles, reports, projects, etc.) by research fields*

For her participation in the competition, Assoc. Prof. Irena Zareva-Zafirova presented 21 (twenty one) publications in a total volume of her texts of 1266.5 standard pages.

The publications of Assoc. Prof. Dr. Zareva-Zafirova can be grouped as follows:

1. Habilitation work (equivalent publication) – chapter of a collective monograph, parts of the introduction and the conclusion with author’s text in a volume of 125 standard pages.
2. Published monographs that are not presented as a main habilitation work (equivalent publication) – 2 in collective monographs with author’s text in volume of 207 and 123 standard pages respectively.
3. A book published on the basis of a dissertation thesis for the award of educational and scientific degree “Doctor” – 1 book with author’s text in a volume of 386 standard pages.
4. Articles and reports published in non-referenced scientific peer-reviewed journals or in edited collective volumes – 2 reports at international scientific conferences with author’s volume of 20.7 and 12 standard pages, respectively.
5. Studies published in scientific journals, referenced and indexed in world-known databases of scientific information (SCOPUS and Web of Science) – 4 studies with author’s text in volume of 23.3, 46.4, 26.7 and 23.1 standard pages, respectively.

6. Studies published in non-referenced journals with scientific peer review or published in edited collective volumes – 6 studies, 5 of which are individual and 1 co-authored, with the author's text in volume of 21.6, 21.4, 21.7, 21.9, 21.3 and 10.7 standard pages, respectively.
7. Published chapters of collective monographs – 5 chapters with author's text in volume of 18.2, 29.9, 18.2, 25.1 and 60.9 standard pages, respectively.

Of the 21 publications, submitted for participation in the competition by Assoc. Prof. Dr. Zareva-Zafirova, 16 are in Bulgarian and 5 in English (1 report at an international conference, 3 studies and 1 chapter in a collective monograph).

All publications of Assoc. Prof. Dr. Zareva-Zafirova, submitted for participation in the competition, were not used for the award of the educational and scientific degree "Doctor" and for the assigning the academic position "Associate Professor".

- *General characteristics of the candidate's scientific, applied and teaching activities*

The scientific activity of the candidate Assoc. Prof. Irena Zareva-Zafirova is impressive, which is proved by the type (monographs, studies and reports) and the content of the submitted publications. In addition, it should be noted that some of the candidate's publications have received prestigious honors from Economic Research Institute at BAS and the Union of Scientists in Bulgaria.

The main field in which the applicant's scientific activity is realized is human capital with three main focuses – formation and use of human capital, human capital in education, external migration and human capital.

The scientific-applied activity of Prof. Dr. Irena Zareva-Zafirova includes the management of 1 national project on the program of Economic Research Institute at BAS, participation in 1 international project of Economic Research Institute at BAS implemented jointly with the University of Fribourg, Switzerland and the Agency for Social and Economic Analyses, Bulgaria, as well as participation in 6 projects funded by Economic Research Institute at BAS, Institute for Population and Human Studies at BAS, and Science Fund at the Ministry of Education and Science.

The teaching activity of Assoc. Prof. Irena Zareva-Zafirova is related mostly to training of PhD students – participations in discussion of dissertation projects, participation in internal defense of dissertation procedures and member of scientific juries for the acquisition of educational and scientific degree "Doctor". Information is provided about the scientific works of Assoc. Prof. Dr. Zareva-Zafirova, which are used in education curriculum and for state exams by Sofia University "St. Kliment Ohridski", University of Economics – Varna, and National Sports Academy "Vasil Levski", Sofia.

### ***III. Quantitative characteristics of the candidate's scientific work***

The quantitative characteristics of the scientific work of the candidate Assoc. Prof. Irena Zareva-Zafirova significantly exceed the minimum science-metric requirements for occupying the academic position "Professor", in accordance with the provisions of the Law on Development of Academic Staff in the Republic of Bulgaria (LDASRB), the Regulations for its implementation and the Regulations of Economic Research Institute at BAS (ERI-BAS).

The specific values of the indicators that I consider an evaluation are presented in the following table:

Group of indicators	Minimum requirements – number of points		Number of points of the candidate
	According to RA LDASRB	According to Regulations of ERI-BAS	
<b>A</b>	50	50	50.0
<b>B</b>			
<b>C</b>	100	100	100.0
<b>D</b>	200	250	657.5
<b>E</b>	100	150	775.0
<b>F</b>	100	100	140.0
<b>Total:</b>	<b>550</b>	<b>650</b>	<b>1722.5</b>

Based on the data in the table, it can be definitely concluded that Assoc. Prof. Irena Zareva-Zafirova significantly exceeds the minimum science-metric requirements for occupying the academic position of “Professor”, according to the normative order and the Regulations of the Economic Research Institute at BAS.

#### ***IV. Evaluation of the results and scientific contribution of the candidate***

##### *1. Scientific achievements of the candidate*

The scientific contributions of the candidate Assoc. Prof. Irena Zareva-Zafirova I evaluate as an enrichment of existing knowledge, by proving with new studies some significant aspects of existing scientific fields, theories and problems, obtaining and proving new facts, and formulating grounded recommendations for the development and implementation of human capital policies.

In my opinion, the most important scientific contributions of Assoc. Prof. Dr. Zareva-Zafirova in the scientific publications presented for the competition, are in the following directions:

- human capital in education (publications No 1 and 11):
  - there is a comprehensive assessment of the human capital in education in Bulgaria in quantitative and qualitative aspect, determining imbalances between demand and supply of pedagogical specialists related to the irrational use of human capital in education in the country and discrepancies between its qualitative characteristics and the needs of the system;
  - the thesis that in Bulgaria the imperfections of the conditions in which human capital operates in education lead more to weaknesses in the activity of its results than its quality;
  - there is a critical review of European policies, and the goals, milestones and changes in approaches in the formulation of a common European Union policy for the development of human capital in education are systematized;
  - formulated are proposals for policies and concrete measures for development and preservation of human capital in education in Bulgaria in several directions – improvement and development of the regulatory framework, improvement of financial ensurance, structure of financial resources and the mechanism for distribution and allocation of financial resources, improvement of the system for the professional and career development of teachers, improving the environment in which human capital functions;

- formation and use of human capital (publications No 2, 3, 6, 7, 12, 13, 14, 16, 20):
  - there is an assessment of the situation and the changes in the regional space for higher education in the Southeast European countries, identifying the most significant problems for the individual educational systems and the factors that determine them;
  - there is an assessment of Bulgaria's place in Southeast Europe's educational space, identifying the strengths and weaknesses of our higher education system, as well as threats and opportunities for its better positioning in the region;
  - conclusions of theoretical and scientifically applied character are formulated regarding the role, state and future directions for the development of higher education in Bulgaria as a factor for the formation of human capital;
  - formulated are proposals for policies and concrete measures for the development of higher education in Bulgaria, for preservation and development of human capital in it and for taking better positions in the regional (Southeast Europe), European and world educational spaces;
  - the thesis about the incomplete use of human capital in Bulgaria is reasoned and the main factors leading to the stated inconsistencies are systematized;
  - there is an assessment of the state and opportunities for realization of young specialists with higher education on the labor market in Bulgaria, and the main factors influencing their realization are identified;
  - based on an assessment of the activity and the employment, identified are factors that cause problems in the transition from education to employment and from employment to retirement;
  - formulated are concrete proposals for overcoming the negative effects and measures and actions are identified for improving the realization of young professionals in Bulgaria;
- external migration and human capital (publications No 5, 8, 9, 10, 15, 17, 18, 19, 21):
  - a critical review is carried out, theoretical concepts of the nature of migration policies, their role and effects are systematized, relevant theoretical generalizations are made, and types of migration policies are systematized;
  - the objectives and stages are systematized, and the migration policies of the European Union, Switzerland and Bulgaria are evaluated;
  - based on analyses of Bulgarian and Swiss migration policies and the results of a representative empirical study of Bulgarian migrants, the theses on the impact of migration policies on the decision whether and where to migrate and on the integration of migrants are proven;
  - factors that determine the migration processes, motives and goals of migration behavior are identified, and based on an interdisciplinary study, causal-effect, direct and reverse relations between social inequalities (between the countries and the sending countries) and the external migration are identified, and the thesis that in Bulgaria the socio-economic inequalities are the main determinant of emigrant attitudes and flows is grounded;
  - determined are gaps in the legal framework in Bulgaria, hindering the practical carrying out of the foreseen activities and the implementation of effective policies and measures aimed at assisting the return of Bulgarians from abroad, as well as the preservation of the Bulgarian identity of Bulgarians living abroad;

- evaluated is the policy of the Bulgarian state regarding the return of the Bulgarian emigrants and it is found that it has not been sufficiently supported by concrete measures and activities for its effective implementation and the desired tangible effect are not yet achieved in this direction;
- developed is a concept to build a system of policies for remaining in the country and for encouragement of the return of Bulgarian emigrants from abroad, including both migration and non-migration policies, and specific measures are proposed to encourage the return of immigrants.

## *2. Coverage of the scientific publications of the candidate in our and foreign literature*

The scientific publications of Assoc. Prof. Irena Zareva-Zafirova have a significant coverage in our and foreign literature, as proved by the provided reliable information for a total of 88 (eighty-eight) citations of her scientific publications in Bulgarian and foreign scientific publications, 18 (eighteen) of which are in scientific publications, referenced and indexed in SCOPUS.

## *3. Significance of the contributions to science and practice*

The contributions in the works of Assoc. Prof. Irena Zareva-Zafirova are, in my view, significant for both science (in the field of human capital) and practice – mostly the formulated the proposals for policies, measures already and activities in the fields of human capital, education and migrations.

## ***V. Assessment of the originality of the presented works and the reliability of the presented scientific data***

The scientific works presented by Assoc. Prof. Irena Zareva-Zafirova for participation in the competition for the occupation of the academic position of “Professor” are, in my evaluation, her own original works and do not contain plagiarism.

My examination showed that the scientific data presented by Assoc. Prof. Irena Zareva-Zafirova are reliable.

## ***VI. Critical notes and recommendations***

My main critical note to the presented works by Assoc. Prof. Dr. Irena Zareva-Zafirova, which is rather a recommendation for future studies, is the insufficient study of the consequences for the human capital and migration processes in Bulgaria of the so-called “fourth industrial revolution” (Industry 4.0), the result of the fast development of the information and communication technologies (digitalisation of the economy and society), including the global network (Internet). It is no coincidence that in recent years as well as now, many studies and discussions on the future of the labor have been conducted under the aegis of the International Labor Organization.

I can recommend to Assoc. Prof. Dr. Irena Zareva-Zafirova to engage with scientific supervision of Ph.D. students.

I do not personally know the candidate in the competition for the academic position of “Professor” – Assoc. Prof. Dr. Irena Zareva-Zafirova, but I know her publications.

In addition, I would point out the candidate's participations in scientific and organizational committees of 6 international scientific conferences, the fact that she is a peer reviewer of journals "Population" and "Papers of BAS. Humanities & Social Sciences", as well as her participation in 20 scientific forums – international and national scientific conferences, seminars and discussions.

### ***VII. Conclusion***

The achieved scientific results and the scientific contributions in the presented works, their originality and the reliability of the scientific provided data, give me a reason for a definite **positive** assessment that **Assoc. Prof. Irena Kirilova Zareva-Zafirova** fully **meets the requirements** for the occupation of the academic position "**professor**", regulated by the normative order and the Regulations of Economic Research Institute at BAS.

Date: 25 April 2019

Member of jury: .....

(Prof. Dr. Lubomir Stefanov)