

## PEER REVIEW

by **Prof. Dr. Yordan Atanassov Hriskoskov**, 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*

Assoc. Prof. Dr. Irena Zareva builds her biography as a researcher on a very good educational basis, which she constantly expands and deepens. She has graduated with a degree in Social and Economic Planning from UNWE in 1987. She has specialized in economics of healthcare at the University of York, UK (1994) and holds a certificate on European Structural Funds from the Program Structural Development Funds ITS, DFID (2005). She has obtained the educational and scientific degree “Doctor” at Economic Research Institute (ERI) at the Bulgarian Academy of Sciences in 2009.

Irena Zareva’s entire scientific career is at Economic Research Institute at BAS. In 1988, she was elected as a Research Fellow after a competition, and since 2012 she is Associate Professor in Department “Macroeconomics”. Together with her scientific publications, work on research projects and training of Ph.D. students (subject of this review), Assoc. Prof. Irena Zareva builds her professional career also in the organization and administration of research activity of the Institute. She has consistently held the following scientific and administrative posts: Scientific Secretary of Department “Macroeconomics” (2009); Scientific Secretary of the Institute (2016); Member and Chair of the Attestation Commission at the Institute (2017); Deputy Director of ERI-BAS (2017). Assoc. Prof. Dr. Irena Zareva is a member of the Union of Scientists in Bulgaria.

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

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

Assoc. Prof. Dr. Irena Zareva, Ph.D., has presented for review – **21 publications (1266.5 own standard pages)**. Classified by groups and the corresponding number of standard pages, the publications of Assoc. Prof. Zareva are as follows:

#### **Habilitation work (equivalent publication)**

**1.** Chapter Two “Human Capital in the Education System”, pp. 78-171, and 1/3 part of introduction and conclusion. – In: Kirova, A., **Zareva, I.**, Matev M. (2012). *Preservation and development of human capital in education and science in Bulgaria*. Sofia: Academic Publishing House “Prof. Marin Drinov”, 255 pp. **(125 standard pages)**

**Published monograph not presented as a main habilitation work (equivalent publications – over 100 standard pages) – 2 items**

2. Chapter One “Higher Education in Bulgaria – Reality and Perspectives”, pp. 13-129, and 1/3 part of introduction and conclusion. – In: **Zareva, I.**, Matev, M., Kirova, A. (2014). *Higher education and science in Bulgaria – economic, social and gender dimensions*. Sofia: Academic Publishing House “Prof. Marin Drinov”, 328 p. **(207 standard pages)**

3. Chapter Two “Bulgaria in Southeast Europe Education Area”, pp. 75-137, and 1/3 part of introduction and conclusion. – In: Kirova, A., **Zareva, I.**, Matev, M. (2017). *Bulgaria in the education and research area of Southeast Europe*. Sofia: E-Books of ERI-BAS, 188 pp. **(123 standard pages)**

**Book published on the basis of a defended dissertation thesis for the award of educational and scientific degree “Doctor”**

4. *Human capital in Bulgaria: formation, state, use, directions of development*. Sofia: Academic Publishing House “Prof. Drinov”, 265 pp. **(386 standard pages)**

**Articles and reports published in non-referenced scientific peer-reviewed journals or in edited collective volumes – 2 items**

5. Bulgarians in the labour market in Spain. – In: *Post-Crisis Economic Development of EU and Bulgaria*, International Conference 18-19 October 2012, Sofia, GorexPress, pp. 395-405 **(20.7 standard pages)**

6. Bulgaria – “exporter” of students. – In: *Economic Challenges: Migration, Globalization, Sustainability, Policies*. International Scientific Conference 21-22 October 2016, Sofia, UNWE, pp. 203-212 **(12 standard pages)**

**Студии, публикувани в научни издания, реферирани и индексирани в световни бази данни с научна информация - 4 броя.**

7. Образователната подготовка на населението в България – потенциал за иновационно развитие. *Икономически изследвания*, 2/2012, с. 103-115 **(23,3 станд. стр.)**

8. Social inequalities and migration. The case of Bulgaria. *Икономически изследвания* 5/2016, с. 21-44. **(46,4 станд. стр.)**

9. Policies for encouraging the return of Bulgarian migrants to Bulgaria *Икономически изследвания* 2/2018, с.65-79 **(26.7 станд. стр.)**. ISSN 0205-3292

10. Returning migrants – effects on the labour market in Bulgaria. *Икономически изследвания*, 2/2018, с. 102-114. **(23.1 станд. стр.)**

**Studies published in non-referenced journals with scientific peer review or published in edited collective volumes – 5 individual ones and 1 as co-author.**

11. Human capital in education in Bulgaria – problems and perspectives. – In: *20 years of investment in the future*. Jubilee International Scientific and Practical Conference 18-19 May 2012, Veliko Turnovo, Sofia: GorexPress, pp. 386-397 **(21.6 standard pages)**

12. Involvement of youth and adults on the labor market – trends and opportunities to overcome the differences. – In: *Family and Solidarity between Generations*, Sofia: Academic Publishing House “Prof. Marin Drinov”, pp. 136-152 **(21.4 standard pages)**
13. Youth with higher education on the labor market in Bulgaria. – In: *Demographic Situation and Development of Bulgaria*. Sofia: Academic Publishing House “Prof. M. Drinov”, pp. 661-673 **(21.7 standard pages)**
14. Problems and Perspectives for Higher Education in Bulgaria. – In: *Economic growth: stimuli and constraints*. International Conference 6-7 October 2014, Sofia, GorexPress, pp. 289-300 **(21.9 standard pages)**
15. External migration processes and innovation potential of Bulgaria. – In: *Economic growth: stimuli and constraints*. International Conference 6-7 October 2014, Sofia, GorexPress, pp. 409-421 **(23.7 standard pages)**
16. Challenges and Perspectives for Higher Education and Science in Bulgaria. *Journal of the Bulgarian Academy of Sciences*, 2/2017, pp. 11-18 (co-author with M. Matev, with the part of I. Zareva mentioned in footnote is **10.7 standard pages**)

**Published chapter of collective monographs** – specific part of the main text, which addresses individual problem or issue on from the common topic, 5 items

17. Educational Policy of the Bulgarian State for Bulgarians Abroad (p. 57-70) – In: Minchev, V., Markova, E., Misheva, M., **Zareva, I.**, Balkanska, I., Boshnakov, V., Kalchev, Y. (2012). *Bulgarian emigration: theories, policies, empirical studies*. Sofia: Ikonopis. 282 pp. **(18.2 standard pages)**
18. Labor Realization of Bulgarian Emigrants (pp. 177-199) – In: Minchev, V., Markova, E., Misheva, M., **Zareva, I.**, Balkanska, I., Boshnakov, V., Kalchev, Y. (2012 ). *Bulgarian emigration: theories, policies, empirical studies*. Sofia: Ikonopis. 282 pp. **(29.9 standard pages)**
19. Sectoral Employment and Occupied Position (Labor Realization) of Bulgarians in Spain. Bulgarians studying in Spain (pp. 206-219). – In: Minchev, V., Markova, E., Misheva, M., **Zareva, I.**, Balkanska, I., Boshnakov, V., Kalchev, Y. (2012 ). *Bulgarian emigration: theories, policies, empirical studies*. Sofia: Ikonopis. 282 pp. (18.2 standard pages).
20. Policies for development of human capital through education in OPHRD, priority axes 3 and 4 (p. 118-132). – In: Beleva, I., Yotsov, V., Vassileva, I., Tasev, A., Kalchev, E., Sariiski, G., Dimitrov, L., Ivanov, S., Zareva, I., Chobanova, R. , Avramov, P., Velkova, D., Ruscheva, D., Boyukliev, O. (2015). *Annual Report 2015. Economic Development and Policies in Bulgaria: Evaluations and Expectations*, Sofia: GorexPress **(25.1 standard pages)**.
21. The Impact of Policies on Migration between Switzerland and Bulgaria (pp. 123-151). – In: Richter, M., P. Ruspini, D. Mihailov, V. Mintchev (eds.). (2017). *Migration and transnationalism between Switzerland and Bulgaria*, Springer International Publishing Switzerland, 201 p. (eBook) **(60.9 standard pages)**

The mentioned and grouped by type publications of Irena Zareva do not repeat the ones presented for obtaining the educational and scientific degree “Doctor” and for occupying the academic position “Associate Professor”.

**By status of the publication/publisher, the publications of Assoc. Prof. Zareva are grouped as follows:**

- Habilitation work (equivalent publication), as well as two published monograph-equivalents that are not presented as a main habilitation work, are referenced in RePEc – ERI-BAS Books series, with RePEc Simple IF 0.412 are included in the National Register of Published Books in Bulgaria (publications 1, 2 and 3 in the list)
- Two monographs (publications 4 and 5 in the list) are included in the National Register of Published Books in Bulgaria.
- Four scientific studies (publications 7, 8, 9 and 10 in the list) are referenced in **SCOPUS** – SCImago Journal Rank (SJR) 0.133, EconLit, RePEc, CEEOL, EBSCO – Economic Studies journal, where they are published, is in the List of NACID of contemporary Bulgarian scientific publications, referenced and indexed in SCOPUS and Web of Science.
- Six publications (publications 6, 11, 12, 13, 14, 15 in the list) are published in individual volumes, included in the National Register of Published Books in Bulgaria.
- Four publications (publications 17, 18, 19, 20 in the list) are chapters of monographs, referenced in RePEc and included in the National Register of Published Books in Bulgaria, and one publication (21 in the list) is a chapter of eBook.
- One scientific article (publication 16 in the list) is published in a journal included in the National Reference List of NACID.

The scientific and applied production of Assoc. Prof. Dr. Irena Zareva consists of developing strategies and presenting written statements on documents and draft projects of normative acts in the field of employment and labor market, education and development of academic staff.

## **2. General characteristics of the scientific, applied and teaching activities of the candidate**

The publications of Assoc. Prof. Dr. Irena Zareva are in the following areas: human capital in education; forming and use of human capital; external migration and its impact on human resources. They fully correspond with the announced competition she is applying for – “Human Capital – Education and Migration”. The published materials are in two languages – 16 publications are in Bulgarian and 5 publications are in English (1 report at an international conference, 3 studies and 1 chapter of collective monograph).

The general conclusion about the publishing activity of Assoc. Prof. Zareva is that by number, volume and variety of the publications, as well as the status of the publications where they are published, it is extremely rich. All publications have their own style, good knowledge of the theoretical foundations of the studied field and the available literature. They are distinguished for deep analytical character and clear theoretical and practical orientation. Proof of this are the prestigious awards (diplomas of BAS for excellence and of the Union of Scientists in Bulgaria for scientific contribution), for two of the publications where Assoc. Prof. Zareva has a dominating participation. Some of the publications of Assoc. Prof. Dr. Irena Zareva have been used or cited in materials of the European Commission and in the development of national and international projects.

In addition to publications in the mentioned fields, Assoc. Prof. Zareva has extensive experience as a **scientist-researcher and as an expert with scientific and applied contributions** in the following directions:

- Participation (after obtaining the academic position “Associate Professor”) in 8 research projects at ERI-BAS and preparation of reviews and opinions for expert councils for discussion of scientific works in the Institute and other scientific organizations.
- Participation in inter-department working groups at MLSP on preparation of strategic and regulatory documents in the field of labor market and demographic development.
- Submission of written opinions on draft laws in the field of higher education for the National Assembly, the Presidency, the Ministry of Education and Science, the Economic and Social Council and other institutions.
- Leadership and participation in commissions for preparation of internal regulations on the organization of the scientific activity, drafts of regulations for the development of the academic staff at ERI-BAS.

Another aspect of Assoc. Prof. Zareva’s work as a well-established scholar are her role in scientific and organizational committees of 6 international scientific conferences, as well as participation in 20 scientific forums – international and national scientific conferences, seminars and discussions. She is also a peer reviewer of journals “Population” and “Papers of BAS. Humanities & Social Sciences”.

The **teaching activity** of Assoc. Prof. Dr. Irena Zareva mainly concerns the training of Ph.D. students as a discussant in Ph.D. programs and seminars. She also has a large number of participations in the discussion of dissertation projects, the admission procedures for Ph.D. studies and the internal defense of dissertations. She has been a member of scientific juries for the obtaining the education and scientific degree “Doctor”. Scientific works of Assoc. Prof. Dr. Zareva have been used for writing dissertation works (established are 11 citations) and have been used in study programs or for state exams by Sofia University “St. Kliment Ohridski”, University of Economics – Varna and the National Sports Academy “Vasil Levski”, Sofia.

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

The quantitative characteristics of the scientific production of Assoc. Prof. Dr. Irena Zareva significantly exceed the minimum science-metric requirements for occupying the academic position of “Professor”, according to the provisions of the Law on the Development of Academic Staff in the Republic of Bulgaria, the Regulations for its implementation and the Regulations of Economic Research Institute at BAS. The specific values of the indicators, presented by the candidate, are as follows:

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>

When comparing the data in the table with the presented documents and the original publications, it is established that they are completely correct and are accepted without reservation. On this basis, it is established that the minimum science-metric requirements for occupying the academic position “Professor” in the national normative documents and the Regulations of Economic Research Institute at BAS are significantly exceeded. In the indicator group “D” (Published monograph not presented as a main habilitation work (equivalent publications)), this exceeding is about three times.

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

##### ***1. Scientific achievements of Assoc. Prof. Dr. Irena Zareva***

Generally, the scientific achievements of the candidate Assoc. Prof. Dr. Irena Zareva for the occupation of the academic position “Professor” can be qualified as systematization and enrichment of the existing knowledge in the announced specific field of the competition “Human Capital – Education and Migration”. This enrichment is achieved through in-depth theoretical and empirical analysis and various methodological approaches that have led to the discovery of new facts in the studied fields and formulation of new policies and concrete measures to solve the identified problems.

More specifically, the publications of Assoc. Prof. Dr. Irena Zareva indicate the following main scientific contributions by specific subject fields of her research studies:

##### **1) Human capital in education (publications № 1, 11):**

- Based on quantitative and qualitative assessment (by education degrees, regions and academic positions) and analysis of the characteristics of the human capital in education in Bulgaria, imbalances of the different phases of its reproduction are revealed, especially between its qualitative characteristics and the needs of the system.
- Established are dependencies, and argued is the relation between the environment in which human capital functions and the efficiency and quality of its activity. With appropriate arguments is defended the thesis that the unfavorable conditions, in which human capital functions in education, lead to weaknesses in its use.
- Formulated are policies and concrete measures for developing and maintaining the human capital in education in Bulgaria through: changes and improvement of the regulatory framework; better financing and better structuring of the financial, material and human resources; improvement of the system of professional and career development of the teachers; improvement of the environment in which human capital functions.

##### **2) Forming and using the human capital (publications № 2, 3, 6, 7, 12, 13, 14, 16, 20):**

- Based on a critical review of the European policies are systematized the goals, stages and changes in the approaches in forming a common EU policy for development of human capital in education. Registered is a delay (mainly in the qualitative characteristics) in the forming of human capital in Bulgaria compared to the EU average.
- Evaluated are the positive results of the political changes and the involvement of the CEE countries in the Bologna Process and the European Higher Education Area, which

are increase of the capacity and number of universities and colleges and expanding the opportunities for a choice of education of the youth. At the same time, revealed is the low competitiveness and insufficient efficiency of the higher education in the formation and use of human capital in the region and in Bulgaria – low quality of the educational product and inadequacy of the educational preparation to the needs of the labor market.

- Formulated are conclusions of theoretical and scientific and applied character concerning the role, state and future directions of the development of the higher education in Bulgaria as a factor for forming the human capital. On this basis, proposals for policies and concrete measures for the development of the universities and higher education institutions, for the keeping and developing their scientific and educational potential and for taking better positions on the regional, European and world educational areas.
- Evaluated is the situation on the labor market in Bulgaria concerning the opportunities for realization of young specialists with higher education. Based on the analysis and evaluation of the economic activity and employment of the population, are identified the factors that cause problems in the transition from education to employment have been identified and are drawn specific suggestions to improve the realization of young specialists in Bulgaria.

### 3) External migration and human capital (publications № 5, 8, 9, 10, 15, 17, 18, 19, 21):

- Based on a critical review of the theoretical concepts about the nature and role of the migration policies, relevant theoretical generalizations are made and systematization of types of migration policies is carried out.
- Through theoretical analysis is proven the role of migration policies as a migration determinant. Argued is the conclusion that the impact of the migration policies on the direction and intensity of the migrant flows and on the integration of immigrants is significant, though the main factors determining the migration processes are social-economic.
- Based on an interdisciplinary study are identified logical and cause-and-effect direct and reverse relations between the social inequalities and the external migration, and the thesis is argued that in Bulgaria the social-economic inequalities are a main determinant of the emigrant attitudes and flows.
- Carried out is a representative empirical study among Bulgarian immigrants in Switzerland. Original results are obtained (of a character of new data and facts), which prove the impact of the migration policies on the decision to migrate and on the integration of the immigrants.
- Evaluated is the impact of the restrictive immigration policies on the size of the migration flows and on the migrants' profile. Established are the changes in the profiles of the Bulgarian emigrants (by gender, age, education, activity, income) under the influence of the changes in the immigration policy and the integration of the immigrants in the receiving country.
- On the basis of a critical review and systematization of the international and European regulations concerning the external migration, it is found that the nature and focus of the EU migration policy change with the changing social-economic and political environment (internal to EU and external). Evaluated is the significance of the various

factors affecting the migration, as well as the interrelations, interactions and arrangements between countries, regions and globally.

- Conducted is an analytical review of the Bulgarian migration policy and are identified gaps in the regulatory framework, which hinder the implementation of adequate and effective policies and measures to support the return of the Bulgarians from abroad, as well to preserve the Bulgarian identity of the Bulgarians living abroad.
- Developed is a concept for creating a system of policies for keeping in the country and for encouraging the return of Bulgarian emigrants from abroad, including both migration and non-migration policies. Specific measures are proposed to encourage the return of the immigrants.

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

The provided reliable information for a total of 88 citations of scientific publications by Assoc. Prof. Dr. Irena Zareva in Bulgarian and foreign scientific publications shows high interest in her scientific work. Particularly important is the fact that 18 citations 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. Dr. Irena Zareva are of substantial significance for the science, mostly with their currency, systematic nature and comprehensiveness of the research area. This is confirmed both by the considerable number of citations in our and foreign scientific publications, and by the prestigious awards she has received for two of the monographs. The practical usefulness of her works is in the proposed policies, measures and activities in the fields of human capital, education and migration.

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

In my personal opinion, the presented scientific works of Assoc. Prof. Dr. Irena Zareva are her own work – a result of persistent and conscientious research work at ERI-BAS. The presented scientific data are reliable and does not cast any doubt on the quality, correctness and relevance of the sources and used methods.

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

I have no critical notes on the scientific publications and other materials presented by Assoc. Prof. Dr. Irena Zareva for the competition. My recommendation to her is to expand her teaching activities, including through the preparation of lecture courses and textbooks for Master's and Bachelor studies.

I know Irena Zareva from her election as a Research Fellow at ERI-BAS. My impressions of her work as a scientist and administrator in science are excellent.



***VII. Conclusion***

The theoretical and practically applied contributions, mentioned in this review, contained in the original scientific works presented for the competition, as well as the reliability of the provided scientific data, give me a reason for a categorical positive evaluation that **Assoc. Prof. Dr. Irena Kirilova Zareva-Zafirova** fully meets the requirements for occupying the academic position “**Professor**” at **Economic Research Institute at BAS**.

Date: 1 May 2019

Member of jury: .....

(Prof. Dr. Yordan Hriskoskov)