

ATTITUDE OF REVIEWER

by **Prof. Dr. Georgi Shopov**, 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 in SG, issue 8 on 25/01/2019

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

I. General evaluation of the candidate regarding her research activity

Assoc. Prof. Dr. Irena Zareva **has a solid experience in conducting fundamental, scientific and applied studies in the social-economic field**. Evidence of this is her participation in many projects from the research plan of ERI-BAS, 8 of which are after occupying the academic position “Associate Professor”. I would particularly note the participation with individual tasks in the projects “Measures for overcoming the demographic crisis in Bulgaria” (2017-2018, assigned to BAS by the Government) and the international scientific project “Migration and transnationalism between Switzerland and Bulgaria: an evaluation of the social inequalities and regional disparities in the context of the changing policies” (2013-2016, funded by the Bulgarian-Swiss Research Program). To this should be added the expert activity of Ms. Zareva on the implementation of specific applied tasks and the participation in inter-department working groups through which she relates the results of her research activities to the practice – total of 14 items. Her publications have been used in the preparation of expert materials for the European Commission. The public recognition is manifested by the **two prestigious scientific awards** of Assoc. Prof. Zareva: Jubilee diploma of the Competition for excellent scientific achievements in BAS, dedicated to the 145th anniversary of the Academy (2014) and Diploma for scientific and applied contribution of the Competition for high scientific achievements of the Union of Scientists in Bulgaria in 2015.

II. Quantitative assessment of meeting the minimum science-metric national requirements and the requirements of the Regulations of ERI-BAS

I accept for evaluation all presented indicators, and my conclusion is that the candidate not only fulfills, but also in the groups of indicators “D” **significantly exceeds** the minimum science-metric national requirements and the requirements of the Regulations of ERI-BAS – the **total number of points achieved by her is almost 3 times the minimum required ones**.

III. Evaluation of the results and scientific contribution of the candidate

Assoc. Prof. Zareva’s scientific results and contributions are in the following three research areas: human capital in education; formation and use of human capital; external migration and human capital. They fully correspond with the announced ones in the competition she is applying in – “Human Capital – Education and Migration”.

The scientific contributions are predominantly related to the *enrichment of existing knowledge* – mostly proving with new means of essential aspects of already existing scientific fields, problems, theories, acquiring and proving new facts. In particular, I would point out:

First, in the field of “Human capital in education”:

- The carried out complex evaluation of the human capital in education in Bulgaria.
- The established relations between the environment, in which the human capital functions in education, and the performance and quality of its activity. On this basis – the defended thesis that the imperfections of the conditions in which human capital functions in education in Bulgaria lead more to weaknesses in the results of its activity, and as a result its quality remains not enough used.
- The proven imbalances between the demand and supply of pedagogical specialists, which leads to irrational use of the human capital in the education in the country and to inconsistencies between its quality characteristics and the needs of the system.
- The systematized strengths and weaknesses of the activity of the human capital in education and the conclusion that Bulgaria lags behind the EU-28 average in terms of formation of human capital, including such of highest level.

Second, in the field “Formation and use of human capital”:

- The critical review and systematization of the European and regional in SEE policies and initiatives for development higher education, as well as systematization of the goals and stages of development of the regional cooperation in SEE in the higher education.
- The proven insufficient efficiency in the formation and use of the human capital in the region – the increased number and share of the population with higher education is accompanied with problems in its realization on the labor market, including due to the poor quality and inadequacy of the educational preparation for the needs of the labor market.
- The systematization of the main factors determining the dynamics in the number of students in SEE countries.
- The evaluation based on an analysis of current facts and data on the low competitiveness of the Bulgarian higher education, which puts it at a disadvantage position compared to most European universities.

Third, in the field “External migration and human capital”:

- The original results (new data and facts) of a representative empirical study among Bulgarian migrants in Switzerland (first of its kind) which:
 - Prove the theses about the impact of the migration policies on the decision whether and where to migrate and on the integration of the migrants; about the impact of the restrictive immigration policies on the size of the migration flows and on the profile of the migrants;
 - The changes in the profiles of our migrants (by gender, age, education, activity, income) under the influence of the changes in the immigration policy, as well as the integration of the migrants in the society in the receiving country.
- The economic profile of the Bulgarian migrants, determined on the basis of original data from a representative empirical study in the country.

As a *novelty to science*, I would outline the following scientific results and contributions:

First, in the field of “Human capital in education”:

- Comparative evaluation of the state of the human capital in the education in Bulgaria and in the EU-28 and its established specificities in our country.

- The results of the SWOT analysis of our higher education system, clarifying Bulgaria's place in the SEE educational area.

Second, in the field "Formation and use of human capital":

- The complex evaluation of the state of the higher education system in Bulgaria in terms of resource ensuring, product and institutional framework, which was carried out using an interdisciplinary approach combining economic and sociological analytical methods.
- The role of Bulgaria in the creation of the educational area in SEE, as well as the made characteristics and evaluations of the higher education systems in SEE countries, their general features and specifics.

Third, in the field "External migration and human capital":

- The systematization of the types of migration policies, made on the basis of an analytical review and theoretical generalizations of theoretical statements and concepts on the nature of the migration policies, their role and effects.
- The proven role of the migration policies as a determinant of the direction and intensity of the migration, in the basis of which are usually social-economic factors, including inequalities.
- The made pioneer systematization of the goals and stages and the evaluation of the migration policies in EU, Switzerland and Bulgaria, as well as their impact on the migration between Switzerland and Bulgaria.
- Evaluation of: the impact of the Bulgarian migration on the economic activity of the population and the labor force in Bulgaria, made in applying an interdisciplinary approach; the effects of the external migration on the labor market in Bulgaria in terms of the leaving and returning migrants; the effects of emigration on the effects of the external migration on the labor market in Bulgaria; the considerable in size money transfers from the migrants to Bulgaria, which, however, are mainly used to meet the basic needs of the migrants and their relatives, and not for investments and development of innovative productions.

Significance of the contributions to science and practice I relate to the following:

- Development of conceptual views on policies and concrete measures for development and preservation of human capital in education in Bulgaria, including recommendations for improving the regulatory framework in order to develop this capital.
- The formulated recommendations for improving the implemented policies and the achieving of succession and sustainability through OPSEIG 2014-2020.
- The suggestions for policies and concrete measures for development of the higher education in Bulgaria, for preservation and development of the human capital in it and for occupying better positions in the regional (Southeast Europe), European and world educational areas in relation with: improving the national education policy; improving the conditions for development of human resources, improving the system of professional and career development, creating appropriate environment and working conditions; improving the financial ensuring; improving the institutional structure, etc.
- The suggested more important guidelines, measures and actions for improving the realization of the young specialists with higher education on the labor market in the country.

- The developed concept for establishing a system of policies for keeping in the country and for encouraging the return of the Bulgarian migrants from abroad, including both migration and non-migration policies.
- The suggested concrete measures for encouragement of the return of the migrants to our country.

IV. Evaluation of the originality of the presented works and the reliability of the presented scientific data

The presented works and scientific results and achievements of Assoc. Prof. Dr. I. Zareva are **entirely** the result of her long conscientious research activity at ERI-BAS. I have had the opportunity to participate in expert discussions of projects and works in which she has participated and I have become convinced of her high professional ethics. The presented scientific data are reliable and does not cast any doubt on the quality, correctness and relevance of the sources and used work methods.

V. Critical notes and recommendations (including an evaluation of their impact on the quality of the presented scientific and applied production)

I have no critical notes to question the quality of the production of my colleague Zareva. Working with her on some projects, as well as my role as a reviewer of her studies and publications, has convinced me that she is responsible to all constructive comments and recommendations aimed at improving the quality of her scientific results. In this regard, I would recommend in her future studies to strengthen the theoretical aspect and to seek even more active and persistent opportunities for systematic contributions in this direction.

VI. Conclusion

Based on all this concerning the candidate's results, her scientific results and contributions, the originality of the presented papers and the reliability of the presented scientific data, **I express my complete confidence that Assoc. Prof. Dr. Irena Zareva fully meets the requirements for occupying the academic position "Professor" at Economic Research Institute at BAS.**

Date: 26.04.2019

Member of jury:

Prof. Dr. G. Shopov