

SUMMARIES OF PUBLICATIONS

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Monograph:

3.1.) Markova, E. 2021. Locked down society: problems of sociological research in (post) crisis situations. Prof. Marin Drinov Publishing House of Bulgarian Academy of Sciences. ISBN 978-619-245-166-0 (in Bulgarian), available online at: <https://bit.ly/3j0Kd3w>

Маркова, Е. Общество под ключ. Проблеми на социологическото изследване в (пост) кризисни ситуации. Издателство на БАН „Проф. Марин Дринов“. 2021. стр. 226. ISBN: 978-619-245-166-0, електронно издание с отдалечен достъп: [https://press.bas.bg/bg/eBooks-105/show-106\(37\)](https://press.bas.bg/bg/eBooks-105/show-106(37)), DOI: 10.7546/LDS.2021

The monograph is a sociological reflection (and self-reflection) on societal challenges and problematization of difficulties facing sociological practice and research in studying social phenomena in a (post) crisis situation. The title "Locked down Society " is a metaphorical expression of the profound and multidimensional social change taking place in the wake of individual and group constraints that have been imposed around the world due to the Covid-19 pandemic. Our lives together have changed - we communicate in terms of physical distance, we comply with unprecedented travel restrictions, remote working and learning have turned the home into both an infirmary for the sick, a school, and a workplace.

The monograph aims, through the prism of a critical analysis of the effects of the pandemic, to outline possible sociological approaches for studying society in a (post)crisis situation, to illuminate important research limitations and to propose solutions. In order to fulfil its stated aim, the book is disciplined within several main tasks:

1) Critical analysis of evolution of coronavirus pandemic in the world, Europe and Bulgaria: social actors and mechanisms for crisis management, measures and vulnerable groups, conflict zones and group contradictions;

2) Analysis and mapping of databases and information resources specifically constructed for the monitoring of the pandemic, with their advantages and limitations, and their application to the control and management of the pandemic crisis;

3) Critical reflection on sociological theories and methodological tools that could be applied to the study of societal phenomena in the context of a multifaceted and rapidly evolving crisis, with a special focus on the challenges for sociology and empirical research methodology in a (post)crisis situation.

This monograph takes into account the following limitations:

1. The analysis of the evolution of Covid-19 pandemic is limited in time (December 2019-March 2021), with a clear outline of the complexity, dynamics and multidimensional manifestations of the crisis. Some manifestations of the crisis (health, economic, political, institutional, digital transformation, public communication, etc.) are mentioned but not analyzed in depth, as the dynamic evolution of the pandemic is not over.

2. The analysis of empirical data and literature sources does not claim to be exhaustive, but illuminates sociological issues related to the crisis that deserves special and in-depth scientific study in the future. More than 200 scientific publications have been commented and used, and the selection of literature sources has been carried out with responsibility, following classical texts, but also publications in English and Bulgarian, provoked by development of the pandemic.

3. The temporally limited analysis of development of the Covid-19 pandemic prioritizes the problematization of social contradictions, conflict zones between social actors in the context of existing institutional mechanisms for crisis management.

4. Results from an own empirical study are used as an example of a possible approach to sample data collection in a context of resource constraints and physical distance, and limitations in the scope and quality of the empirical information obtained are pointed out and analysed. An overview is given of some research methods that can be used in a crisis situation without claiming to be exhaustive. The book takes into account the ongoing scientific debate related to the effects of the pandemic without going into depth.

5. Last but not least, the exposition reflects the evolution of the pandemic and societal changes internationally, but the most serious focus is on the situation in Bulgaria. The evolution of the pandemic and the institutional response varies considerably between countries, and specific national studies are needed to enrich the scientific findings from international comparative studies.

The outlined aim, objectives and limitations are in turn subordinated to several key research questions:

1. Are the societal problems and contradictions caused by the Covid-19 pandemic, or does the crisis act as a "magnifying glass" and exacerbate them?

2. Are the effects of the development of the Covid-19 pandemic and the post-crisis changes in human behaviour a consequence/manifestation of a dramatic social change already underway?

3. The Covid-19 crisis poses serious challenges for sociology and empirical research. How might the methodology of empirical research be adapted in conditions of physical distance?

The monograph is organized as follows: the *first part* devotes space to a contextual analysis of the evolution of the global epidemic crisis of Covid-19 from late 2019 to March 2021: what causes it, who and how manages the pandemic crisis, and, retrospectively, how key social actors respond. It provides a critical analysis of how Covid-19 pandemic constructs new social distinctions and vulnerable groups. The mechanisms and measures against the spread of contagion and the sociological paradoxes generated are problematized. Instruments for measuring the evolution of the pandemic and the effectiveness of anti-epidemic measures are critically analysed. Part one ends with a summary and conclusions, among the most important being:

First, Covid-19 is a global crisis with local variations. Management of the pandemic is characterized by multidimensional variability: on the one hand, viral infection proceeds differently depending on socio-demographic characteristics such as age and multimorbidity. On the other hand, the prevalence of infection varies because of established mutations of the virus that cause different infections and manifestations. In longitudinal terms, the pandemic is occurring in waves, with a clear onset of increased infection accompanied by increased mortality. The pandemic crisis of Covid-19 is characterised by a high degree of dynamism, spanning the world globally but managed with different tools and effectiveness varies by country.

Secondly, the pandemic crisis - with its multidimensional nature and effects - is accompanied by infodemics, speculation and spread of fake news. The management of the pandemic suffers from contradictory measures and is accompanied by protest movements of varying scale and impact in many countries. The complete closure of public services, travel bans and school closures (lockdowns) are not having the necessary effect of controlling the outbreak or are only having a short-term effect.

Third, the management of the pandemic crisis reinforces various societal contradictions, on the one hand because of the institutionally defined and targeted with anti-epidemic measures vulnerable groups - target of various government interventions. Poor, socially excluded and living in poor living conditions are a particularly vulnerable group because of their inability to maintain good personal hygiene. Covid-19 pandemic hits hardest those groups in society who are in various vulnerabilities - from unemployment, social exclusion, poverty, domestic violence. On the other hand, the restrictive anti-epidemic measures pitted health workers against those who remained unemployed, parents of children left to study at home against their employers. Last, but not least, vaccination policies can also deepen divisions in societies, especially if health status of the population is institutionally distinguished according to whether or not a vaccine against Covid-19 has been administered. Vaccine shortages are a further aggravating factor of the divide. In addition to the serious economic problems, the management of the pandemic raises ethical and moral issues - vaccination is voluntary but will be a limiting factor in travel, for example. There is no public consensus on whether it is ethical to require a negative test when going to work, whether it is acceptable to close educational institutions when educational inequalities are widening.

Fourth, the mechanism of government decision-making is not predictable and unambiguous. There is no clear system for planning measures according to scientific findings and data on development of pandemic. Public confidence in institutions, but also in effectiveness of restrictive measures imposed, is closely linked to the effects of pandemic management. The contradictions in the recommendations are typical not only for national anti-pandemic policy but also for international organisations. The palette of restrictive measures in European countries is very rich - from imposing curfews, 'green corridors for elderly' to a complete ban on leaving the home. In many countries, there is a lively public debate about whether managing the pandemic involves restricting civil rights.

And last but not least, because of the high mortality and virulence of SARS-Cov-2 virus, we are seeing a sudden and rapid massive change in behaviour in all affected countries with few exceptions. Wearing a protective mask in public, hygiene when sneezing and coughing, hand hygiene and physical distance are habits that have been adopted by the majority of population in different countries in a very short period of time. Various sources have indicated that there is fatigue with prolonged containment measures, with hopes focused on 'natural' containment because of the large numbers who have been ill, and vaccination programmes to limit the health risks to large groups of people. Following a conceptual analysis of the global and national pandemic crisis, the sociological challenges of Covid-19 need to be scientifically explained and problematized.

Part two analyses the opportunities and challenges for sociology in a (post)crisis situation. The pandemic as a case study is examined through the prism of social-psychological theory of *dramatic social change* as a cause of collective social trauma, reinforcing already existing social contradictions with new dimensions. An analysis of the study of the pandemic as a social phenomenon is presented, with a summary and conclusions. The theoretical analysis done in part two outlines the need for a timely and responsible debate on development of Covid-19 pandemic in the world and in Bulgaria: in personal, community, and public life, within family, social, and community relationships and interactions, and in the context of the public institutions we - as a society - have created and their actions. All the changes taking place and those to come need to be conceptualised and explained in order to take the most appropriate measures for post-crisis (because of Covid-19 or any other major event) recovery. The question of whether the pandemic creates and provokes a new crisis or is a consequence of an ongoing crisis of community identities will be debated, studied and analysed in the future. Important conclusions from part two are:

First, theories of social change can be used and adapted to typify the impact of the pandemic on social structures, interactions and development. In addition to the macro-sociological view, mid-level theory can be used to closely observe and examine individual and community processes. The multidisciplinary approach between sociology, economics, medicine and psychology has a great cognitive potential precisely from the perspective of Covid-19 and societal change. Sociology has an important role to play in development of society and public policies and must defend this place in Bulgarian society.

Second, the theory of *dramatic social change* can be applied to the case of Covid-19 and changing individual and societal lives. When analysing a crisis, it is important to consider all the key factors of change: the scope and rapidity of the event, the disruption of social structures, the disruption of normative structures, and the threat to identity.

Last but not least, there is a global crisis in the understanding of solidarity and mutual aid. Development of pandemic in Bulgaria has revealed numerous conflict zones, divided groups and communities, and unfortunately the power to deal with a pandemic lies in the community, not in the individual. The crisis of confidence in institutions in Bulgaria may be rooted in the apparent definition of a state of stability that we thought we were in. Bulgarian society may have been in a state of inertia, changing smoothly due to globalisation and digital transformation, but because of the pandemic and the multi-sectoral crisis it has caused, it has quickly moved into a state of dramatic social change. The correct diagnosis of social transformation in a pandemic context is an extremely difficult but important task. The global crisis triggered by Covid-19 pandemic is complex and multidimensional in nature, and scientific analysis would be enriched and refined by applying a holistic approach to overcome the challenges of subjectivity, narrowness, and fragmentation in analysing the causes, development, and effects of the emerging global societal crisis. Constructing a methodology for the empirical sociological study of a multidimensional societal crisis is a key systems approach (and technology) in the cognitive process and requires dedication, responsibility, in-depth knowledge and sociological intuition.

The *third part* is devoted to social research in a (post)crisis situation, such as the one caused by the Covid-19 pandemic. Answers are sought to questions such as what are the challenges for sociology in crisis? What are pressing scientific tasks for Bulgarian sociology because of problems and contradictions created by the pandemic? The constraint of physical distance creates a new, hitherto unknown barrier to empirical social research, but the Covid-19 pandemic opens up possibilities for the acquisition of new 'terrains' for empirical research. Methodological issues and research solutions related to planning, collecting and analysing empirical data in a crisis situation to be explored by sociology in Bulgaria, are presented. An overview is given of methods for collecting empirical information that can be applied and adapted in a global crisis situation. An original research approach is demonstrated and justified using an innovative "*zero budget*" quantitative research methodology - suitable for gathering reliable empirical data in conditions of crisis and physical distance. Advantages and limitations are revealed, both for Bulgarian sociology and for methodology of empirical research, which will have to be taken into account in the future. Some findings about the state of the sociological debate in Bulgaria are discussed, but with optimism and conviction that such a conversation cannot be postponed any longer. The third part ends with a summary and conclusions in the spirit of dialogical sociology about the (post)crisis challenges for sociology and empirical research. The conclusion is devoted to reflections on the crisis as a challenge and opportunity for society and for sociology. A list of abbreviations is provided in Annex 1, tables and graphs in the text

are listed in Annex 2. More than 200 sources are cited in the book: monographs, articles in scientific journals, preprint publications, reports, analyses, Internet sources and databases.

The pandemic crisis has raised acute questions about the future of sociology and empirical research in particular. Internet surveys are a challenge for sociology in Bulgaria because of problems with reaching hard-to-reach populations that do not use the web, because of sampling bias and nonresponse bias. Covid-19 is not the first crisis that sociology has had to deal with (it has done so in natural disasters, wars, and other emergencies), but researchers need to prioritize their efforts on several key points: changes in survey methodology, optimization of response rates and motivation of people to participate in surveys, efforts to increase flexibility in planning and recruitment of empirical information, and efforts to ensure high quality of empirical information collected. In Bulgaria, a concerted effort should be made to find appropriate, innovative and scientifically validated approaches to broaden the scope of empirical social research in times of crisis and to compensate for problems with the quality of empirical information obtained on the Internet.

The Covid-19 pandemic has challenged humanity and civilization by exacerbating deferred but also creating new social problems and inequalities. Societies in crisis need scientific analyses and forecasts of the necessary measures and processes for post-crisis recovery. Because of the pandemic, everybody started to do sociology (Burawoy 2021,), but the social problems illuminated by the crisis have a more global scope and meaning:

First, the Covid-19 pandemic is a phenomenon with global reach and local variations. The complexity of crisis management planning stems from the multidimensional variability of causative mutations on the one hand, and societal responses, cultural and economic specificities, and socio-demographic characteristics on the other.

Second, the complexity of pandemic crisis management tools - with their multidimensional nature and effects - are complemented by infodemics, speculation, and spread of fake news. The political response to the pandemic has been characterised by contradictory measures, accompanied by protest movements of varying scale and impact in many countries. In different parts of Europe, anti-epidemic measures are perceived by societies as contradictory, and may have a disincentive rather than a preventive effect.

Thirdly, the management of the crisis triggered by Covid-19 brings new nuances and reinforces multilayered social contradictions. Poor, socially excluded and those living in poor living conditions exemplify vulnerability in crisis situations, not only in the case of Covid-19. Beyond the serious economic trials, crisis management in ethical and moral issues - is vaccination voluntary, is vaccine choice guaranteed, will all have equal access to vaccination. The role of research is a priority, yet government decisions are not based entirely on scientific findings and data.

Fourth, the high mortality and virulence of the SARS-Cov-2 virus is causing an abrupt and rapid mass change in behaviour in all countries with few exceptions. This phenomenon is of particular interest for sociological research. Wearing a protective mask in public, hygiene when sneezing and

coughing, hand hygiene and physical distance with habits that were adopted by the majority in a very short period of time. There was a change in the rules of social intercourse.

Fifth, the crisis created by Covid-19 virus infection has the potential to provoke *dramatic social change*. A timely and responsible debate is needed to analyse what is happening in the world and in Bulgaria: in personal, community and public life, within family, social and community relationships and interactions, in the context of public institutions, their quality and their actions. Theories of social change can be successfully used and adapted by applying a multidisciplinary approach between sociology, economics, medicine and psychology. Whether the pandemic has created new social contradictions or reinforced the action of existing ones is a research question of future scientific interest.

Sixth, there is a global crisis in the understanding of solidarity and mutual aid. Development of the pandemic in Bulgaria has revealed numerous conflict zones, areas of division between groups and communities. The crisis of trust in institutions in Bulgaria may be rooted in the apparent definition of a state of stability in which we thought we were. Bulgarian society may have been in a state of inertia, changing smoothly due to globalisation and digital transformation, but because of the pandemic and the multi-sectoral crisis it has caused, quickly shifting into a state of dramatic social change. The correct diagnosis of social transformation in a pandemic context is an extremely difficult but important task.

Seventh, the Covid-19 crisis presents social scientists with a complex challenge - the inability to conduct classic face-to-face empirical research. The Bulgarian but also the global sociological community needs to prioritize several research tasks: the potential of using mixed-model sampling methodologies, adapting and applying innovations in research strategies in the context of information technology and digitalisation, a concerted effort to expand the use of existing Internet and online representative panels for research purposes, and the potential of using non-stochastic samples. Priority should be given to methods for optimizing coverage in empirical research.

Eighth, digital transformation appears to be a successful strategy to address the effects of the pandemic. In Bulgaria, Internet surveys do not provide representative data for the adult population. Addressing coverage issues in Internet surveys should become part of scientific priorities, as online surveys have a number of advantages that, in combination with other methods of empirical data collection, can optimize the quality of information.

Ninth, the Bulgarian professional and scientific sociological community must demonstrate intransigence towards unscientific and pseudo-professional practices. No matter when, whether in a pandemic crisis or in an election situation, any public violation of professional and scientific standards destroys the overall prestige of the science of sociology. Serious emphasis must be placed on the considerable scholarly effort to use Bulgarian sociological terms to ensure that the Bulgarian scientific community communicates in the same language with each other and with the world.

The crisis caused by Covid-19 has done enormous damage, but it has also mobilised intellectual, social and scientific potential. Science and technology are tools for humanity to cope with the crisis. Scarcity - of rights, vaccines, health - creates new social inequalities and conflicts, but points to possible solutions. Changes in individual and social behaviour, the crucial importance of education and science, and the defects of institutions and democratic principles signal that humanity must take urgent measures to restore natural and social balance.

The locked down society needs to open the door, to recover from the crisis by preserving what is precious and getting rid of the unnecessary and unuseful baggage that has accumulated over the last decades because of a sense of timelessness and carelessness. The global has entered homes through screens and with a protective mask. Embrace may make one ill, but man has instincts that have evolved over millennia and will not accept physical distance as a condition to move on with life with others. Values, solidarity responsibility, intellect and scientific development are the keys to freeing our post-crisis future together.

This monograph is not only addressed to specialists in sociology, social psychology, philosophy, public policy and empirical research methodology, but also to any reader with an interest in the humanities and the contemporary challenges of living together.

A book based on a defended dissertation for the degree of PhD:

5.1.) Markova, E. (2016). Problems of sample optimisation in case of coverage bias. Sofia: omda. 2016. 182 p. ISBN 978-954-9719-92-5, available at:

http://www.omda.bg/uploaded_files/files/articles/E_Markova_1483970962.pdf

Маркова, Е. (2016). *Проблеми при оптимизация на извадкови данни с непълноти в обхвата*. София: изд. Омда. 2016. 182 с. ISBN 978-954-9719-92-5, електронно издание с отдалечен достъп:

http://www.omda.bg/uploaded_files/files/articles/E_Markova_1483970962.pdf

Over the last 10-12 years in empirical sociology in Bulgaria, sample surveys have become one of the most commonly used, especially in which private research agencies have a special place. Simultaneously with their successes, their intensive development poses many problems and limitations, whether the results of surveys serve managerial practice or various tasks of scientific knowledge.

The presumption of a correct and accurately modeled sample is important, but is generally not a sufficient guarantee of desired matching of sample estimates to parameters of the general population. It is well known that there are multiple sources of both stochastic and non-stochastic errors at different stages of any empirical sociological study. All of them eventually lead, to one

degree or another, to deviations (errors) from the actual parameters. These errors often do not allow the conclusions drawn from the sample to be generalized correctly, which in fact defeats its purpose. Worse still, this is not always obvious and is often not sufficiently realised.

Incompleteness in coverage in surveys (sampling and exhaustive) is a common phenomenon that inevitably generates "noise" in the information. Sociologists disagree on the acceptable proportion of uncovered units where this 'noise' would not pose a research problem. Moreover, different methods are used in Bulgarian and foreign survey research practice to reduce non-coverage and non-respondents. These approaches often do not solve the problem at hand and sometimes lead to contradictory and ambiguous results.

The Bulgarian specialized literature still does not pay enough attention to coverage problems and methods to solve them, although the need for this is growing significantly and will probably increase more in the near future. In foreign theory and practice, intensive research is being done and methodological solutions to scoping problems are being sought. A number of approaches, procedures and methods are being put forward and justified, through which solutions are being sought to varying degrees of this problem. Many of these methods are still unknown and not used in Bulgarian survey research. Our research shows that no specific methodological studies have been done in Bulgaria on the possibilities of these new methods and evaluations of their effectiveness in solving coverage problems.

The main research thesis is: Missing data in empirical studies (sample and comprehensive) represent a significant problem affecting both theory and practice of survey research, and attempts to find solutions, especially in Bulgaria, are extremely limited. New solutions and improvements to earlier ones exist in global practice in this respect. Some of them can be successfully adapted and applied in the Bulgarian practice of empirical sociological research.

The aim of the research is to analyze the problems and existing approaches, methodological and methodical solutions for sample data optimization under coverage gaps, to critically evaluate the comparative advantages and disadvantages and to justify strategies, recommendations and proposals for their solution.

In this regard, several research tasks are formulated:

- 1) To investigate and shed light on sampling optimization issues affecting coverage incompleteness and to assess their relevance to survey practice;
- 2) To investigate the potential of methods proposed in theory and practice for sample data optimization in coverage problems, by making a summary analysis and systematizations of the latter;
- 3) To investigate the conditions and limitations for the application of the proposed methods and approaches and to assess their comparative advantages, applicability and limitations;
- 4) To justify and construct a general concept of the pathways and directions of solving the problems with missing data in surveys.

In this regard, several research hypotheses have been formulated, which we will try to test in the process of research on the topic. These hypotheses are:

The first. In the practice of survey research, data loss occurs too often (practically always) and for various reasons. Above a certain limit ("threshold") this loss distorts the quality of information and the results of the study become uncertain, uninformative and unreliable.

Second. In the Bulgarian survey practice, partly in other countries, there is an unjustified underestimation of coverage problems in the theoretical, methodological research and in practice. Probably for this reason, serious systematic research on these issues is completely lacking in Bulgaria. What is done, however, is mainly limited to findings on the volume and characteristics of the missing information (what is missing and how much). There is virtually no effort to assess the effects of data losses and their impact on the reliability of information.

The third. Globally, there have been well-founded, validated and successful methods in recent decades that offer different solutions to the coverage problems. At least some of them can be adapted and used in our country for optimization of datasets with missing data.

Different approaches have been used in the research work in this paper: aggregate (statistical) approach in evaluations of effectiveness of the different methodological solutions studied; comparative analysis of different theoretical propositions - approaches, methods, procedures - concerning coverage problems in sample data; monographic approach - in the study of some theoretical propositions and applied methods in this field; modelling approach - in the justification and construction of a general concept and developed classifications, embedded in the aim and objectives of this research work.

Here an attempt is made to search for and justify theoretical propositions, and generalizations and evaluations made are supported by analysis of domestic and foreign empirical data.

The content of this research study is subject to several important limitations: 1) Coverage issues are considered in the context of representative sample sociological surveys as a mass case. But in fact, the methodological solutions presented can be used in comprehensive as well as in other types of sample survey research. 2) Due to limitations of different nature, it was not possible to do in the method of imputation to missing data own original research on specific empirical material. Therefore, imputation is presented, analyzed and systematized in a generalized form and offered as a basis and guideline for future research on this topic.

A total of 139 titles of literature sources were used in the development of this study, of which 40 in Bulgarian and Russian, 99 in English. In addition to materials with sociological subject, this text also makes use of developments in probability theory, mathematics and applied statistics. Empirical data from Bulgarian and foreign surveys is used to assess the capabilities and comparative advantages of the approaches and methods applied abroad. The idea that a sociologist should be familiar with the fundamentals of mathematical-statistical analysis underlies this research. In order to be able to apply it accurately and to find in it arguments for the validity of their generalizations, it is essential that the methods and approaches borrowed from mathematics, statistics, informatics and other fields be

evaluated through the prism of the needs and specifics of sociological scientific knowledge. Efforts should therefore be made to adapt them, apply them correctly and interpret the results in an understanding way.

This book explores and illuminates key theoretical and practical issues concerning non-sample data, their implications and significance for the results and effectiveness of survey research, marketing and more generally for representative surveys. The conclusions and evaluations of this analysis have implications for all other types of population-based research, insofar as the phenomenon of 'missing data' is present in them.

A reasoned systematization of the methods available in theory and used in practice for data optimization under non-coverage is made. Their advantages and limitations are critically evaluated. Some drawbacks and practical limitations of the main methods in theory and practice in other countries are revealed. The Bulgarian solutions to the "missing data" problem are also critically evaluated. The main criteria for this evaluation are also systematized: validity and reliability; material and financial costs; time costs and speed or "freshness" of the obtained scientific products (summary evaluations, conclusions and generalizations).

A general concept for treating and solving data loss problems in representative sample surveys is justified. It outlines general guidelines and strategies in practical work in surveys concerning "missing data". Criteria for effectiveness are outlined, as well as the factors and conditions that determine the application of different approaches and methods.

A comparative analysis of the advantages and limitations of some models and methods from the missing data imputation approach is presented in a practical-applicational perspective, with recommendations for those that are more appropriate for our practice.

Empirical evidence is presented that the use of non-stochastic procedures in the treatment of incomplete arrays in Bulgarian survey practice does not give satisfactory results and is therefore not to be recommended. It has been clearly justified and demonstrated that this practice may in principle deteriorate the quality of the sample even more than if the incomplete array is left untreated.

What has been done here is only a modest step in the search for a solution to the coverage problems in surveys. Obviously, going forward, research work on these problems needs to unfold in at least three main directions: 1) developing and justifying methodological solutions at the design stage of surveys (and of all other types of aggregate research); 2) improving the organization of fieldwork, in which the task of providing qualified and successful survey teams deserves a central place; 3) improving existing and creating new approaches and methods to solve the problem of "missing data" at the stage of information processing and analysis.

Articles and reports published in scientific journals, refereed and indexed in world-renowned databases of scientific information

6.1.) Markova, E., Tosheva, E. (2020) Why to go for early retirement? Determinants for early exit from the labour market: the evidence from Bulgaria. *Balkan Social Science Review* (16), 299-315, ISSN 1857-8799, *достъпна на адрес:*
<https://js.ugd.edu.mk/index.php/BSSR/article/view/4010/3597>

In line with the increasing retirement age and challenges to achieve longer and healthier working lives in Europe, this analysis based on empirical evidence aims to shed light on the determinants of early retirement in Bulgaria, the fastest ageing and poorest country in the European Union. This analysis is based on nationally representative empirical data for Bulgaria from the Survey on Health, Ageing and Retirement in Europe, wave 7 (SHARE: version 7.0). The analysis of ageing processes requires multidimensional planning of the potential of European societies for quality and longer participation in working life at national and pan-European level. The comparative analysis of demographic development processes in Europe is used for policy making and future research tasks, but population ageing poses a serious challenge to European leaders because of multidimensional variations and social specificities across countries that are not always taken into account.

This article presents a contextual analysis of Bulgaria as an example of an "extreme" case due to its demographic development, high poverty rates and low life expectancy (Botev, 2012, pp. 69-79; Davoudia, 2010). The aim of the analysis is to identify determinants of individual push and pull factors on early retirement plans with a focus on gender differences. Early retirement plans in Bulgaria depend on gender and various individual and/or family (household) nation-specific factors. From a research perspective, it is particularly important to examine attitudes towards early retirement, the motivations of people at the end of their careers in Bulgaria in the context of the current legislative framework which allows for limited early retirement schemes and a continuous increase in the retirement age. On the basis of a theoretical review and according to the content of SHARE data, the paper analyses three main types of determinants of the early retirement decision: 1) Demographic determinants: education, gender, family status; 2) Health determinants: self-rated health; 3) Socio-economic determinants: quality of life (CASP index), household economic situation.

The paper contributes to the current scientific sociological debate in at least two aspects: 1) The Quality of Life Measurement Index (CASP index), widely used as a factor measure for early retirement plans (Hyde, M. at al., 2003) needs to be carefully analyzed in a national context. Data analysis shows that the constituent CASP components have different strengths in determining early retirement plans, including conflicting effects by gender. 2) In theoretical but also in practical terms, the paper emphasizes the need for contextual analyses, as research and public policies in the European Union include a small fraction of national specificities (Wojciech et al., 2018), especially regarding

the individual motivations and characteristics of a highly heterogeneous group of workers - people at the end of their careers.

Early retirement plans for people at the end of their careers in Bulgaria are significantly gender-determined. Early retirement can be perceived as a source of guaranteed income and a solution in case of precarious employment, especially for people with poor health status and low education. In countries such as Bulgaria, where women combine different social roles but care for household members depends mainly on them, marital status can be an important factor in planning the transition from employment to retirement.

Articles published in non-refereed peer-reviewed journals or published in edited collective volumes:

7.1.) Markova, E. and Yordanova, G. (2019). Becoming a New Share Country – Bulgaria. In *SHARE Wave 7 Methodology: Panel innovations and life histories*, edited by M. Bergmann, A. Scherpenzeel and A. Börsch-Supan. Munich: MEA, Max Planck Institute for Social Law and Social Policy. 2019. 64-65. ISBN: 978-3-00-062956-3, *достъпна на адрес:* http://www.share-project.org/fileadmin/pdf_documentation/MFRB_Wave7/SHARE_Methodenband_A4_WEB.pdf

Bulgaria does not participate in many comparative international surveys and joining the Study on Health, Ageing and Retirement in Europe (SHARE) is a significant advantage, compensating for the lack of socio-economic, demographic and health data on people aged 50 and over every two years to support knowledge-based research and public policies. The paper examines Bulgaria's experience in joining wave 7 of the Survey of Health, Ageing and Retirement in Europe (SHARE). It presents the motivations for Bulgaria to become part of SHARE, describes the difficulties and challenges of Bulgaria's participation in this prestigious comparative international project (funding, co-funding and implementation of the survey in the field) and outlines future research and practice intentions. The article contributes to broadening the awareness of the international audience about the country Bulgaria, about the possibilities of Bulgarian scientific and applied sociological expertise to organize and support Bulgaria's full participation in SHARE, as well as about the specificities of national support for participation in European international comparative research, which support after 2019 has been extended and established as part of the National Roadmap of Research Infrastructures.

7.2.) **Markova, E.,** Yordanova, G. (2019). "Does sport have a place in the life of Bulgarians aged 50+? Analysis of national data from the 7th wave of SHARE", Sofia: Scientific and Methodological Journal Sports and Science: International Scientific Conference" Sports and Recreation ", 29.11-01.12.2019, Blagoevgrad, 26-36. ISSN: 1310-3393, available at: http://www.scienceandsport.com/downloads/sn_0_2020.pdf

Маркова, Е., Йорданова, Г. (2019). Има ли място спортът в живота на българите на 50+? Анализ на национални данни от 7-ма вълна на SHARE, София: *Научно методическо списание Спорт и наука: Международна научна конференция „Спорт и рекреация“*, 29.11-01.12.2019г., Благоевград. (2019): 26-36. ISSN: 1310-3393, достъпна на адрес: http://www.scienceandsport.com/downloads/sn_0_2020.pdf

The paper presents a sociological analysis of unique, nationally representative data for Bulgaria, available for the first time in the framework of the 7th wave of the Survey on Health, Ageing and Retirement in Europe (SHARE), to be used to adapt and/or to create targeted public policies for people aged 50 and over in the field of health and social policy. Bulgaria is the country with the most serious demographic situation in Europe, and among the fastest ageing nations in the world. One of the serious problems to be solved for the modern society is the creation of the necessary prerequisites and conditions, technologies and mechanisms for the integration of leisure sports within the health care system. The health and quality of life of older people is of utmost importance for sustainable development and a long working life. The analysis of current data from the Survey on Health, Ageing and Retirement in Europe (SHARE) on physical activity and health of people aged 50 and over in Bulgaria is an important aspect of knowledge-based public policy planning and implementation.

The article discusses the lifestyle of Bulgarians aged 50 and over, their chronic diseases, the level of health culture and the importance of active physical and sporting activity in increasing the quality and duration of life. The analysis was performed using statistical methods for quantitative data using SPSS (version 26.0 (IBM, 2019)).

Data from SHARE about physical health were presented through multivariate analysis of variables such as gender, age, education. The publication presents for the first time data for Bulgaria through composite indices: the Body Mass Index (BMI); the Global Activity Limitation Index (GALI); the Activities of Daily Living (ADL); and the Instrumental Activities of Daily Living (IADL). The paper concludes by arguing for the need for targeted policies and measures to activate sport and recreational activities for people aged 50 and over in Bulgaria.

7.3.) Markova, E., (2016) Migration, employment and integration of the Third-country nationals in Bulgaria – national specifics, good integration practices and challenges, In: Jubilee conference proceedings "Economic Sociology 4.0", ISBN 978-954-644-872-9, 237-244, available at: <http://departments.unwe.bg/Uploads/Department/SbornikIkonomicheskaSociologia4.0.pdf>.

Маркова, Е. (2016). Миграция, заетост и интеграция на граждани на трети страни в България – национални специфики, добри интеграционни практики и предизвикателства. Юбилейна конференция „Икономическа социология 4.0“, УНСС, Издателски комплекс УНСС, 2016, ISBN:978-954-644-872-9, 237-244, достъпна на адрес <http://departments.unwe.bg/Uploads/Department/SbornikIkonomicheskaSociologia4.0.pdf>

The issue of migration of third-country nationals is particularly topical when in 2016 Europe is facing an unprecedented wave of refugees from North African countries and has to deal with the dilemma whether to collapse economically and socially or to solve its problem with demographic change and labour shortages. Bulgaria, until recently mainly a source country for external migration, is becoming part of the path of the migration wave towards central Europe. The debate in the European Union on migration quotas and security guarantees raises the question of whether Bulgarian society and institutions are ready to welcome migrants and whether existing integration instruments are up-to-date and effective. The article discusses the problems of migration of third-country nationals, the reliability of migration statistics and the existing integration policies created so far for third-country migrants. Special attention is also paid to good practices for the integration of third-country nationals, which can be extremely useful in updating national integration policies. Bulgaria will have to accept and integrate migrants, but in order to keep them on its territory it needs to prepare reliable and effective instruments for providing appropriate training, employment and social integration in a targeted and long-term manner.

7.4.) Markova, E., (2012), Variety of communications in social media - ethical dimensions. In: Ethics in Science, 7th National Conference in Ethics, UNWE, Sofia, ISBN:978-954-644-347-2, 348-355 (in Bulgarian); available at: <http://cvmissk.files.wordpress.com/2012/12/etikata-v-balgarskata-nauka.pdf>

Маркова, Е. (2012). Многообразието от комуникации в социалните мрежи - етически предизвикателства. *Етика в българската наука*, УНСС, ISBN:978-954-644-347-2, 348-355, достъпна на адрес <https://ethicsbas.files.wordpress.com/2012/12/etikata-v-balgarskata-nauka.pdf>

Since 2004, the Internet is no longer the same as the "material" global world. With the creation of the first social network, Facebook, virtual communication took a completely new direction. This paper analyses empirical evidence why Facebook is the most popular social network in the world and what its reach is in Bulgaria seven years after its creation. Different aspects of communication in social networks are at the center of research inquiries, but it cannot yet be said that all advantages and limitations in this virtual society have been exhaustively studied. How many virtual friendships can an average social network user engage in? A new virtual social environment is evolving in the face of which spatial and temporal constraints do not exist and the imposition of well-known, but conservative, classical rules of communication does not always achieve the necessary effect.

The generally accepted system of ethical norms and rules in communication seems to need to be adapted as virtual communication develops its own laws and norms around which a vacuum still exists, while adapted rules and ethical norms are being written on the fly. This paper addresses several important ethical challenges: children in social networks, social change and technology, revolutions and virtual citizenship. Increasingly in the public sphere, the notion that the only "free" space on Earth is the Internet, and that social networks are the tribune for expressing and defending that freedom, seems to be circulating, but this notion of virtual "freedom" actually sometimes violates the ethical rules of social interaction.

7.5.) Markova, E., (2012), The opportunities for application of “quanti-qualitative” approach for the purposes of the pre-test research – relative advantages and limitation. In: *Sociology and Economics*, Sofia, ISSN:1314-3603, 52-60. (in Bulgarian);

Маркова, Е. (2012). Възможности за приложение на "качествено-количествен" подход за целите на пробното изследване - относителни предимства и ограничения. *Социология и икономика*, 1-2012, ВУ КИА, ISSN:1314-3603, 52-60.

In the context of an almost definitive "fieldwork fatigue" in Bulgaria (progressively low response rates), combined on the one hand with increasing demands for quality of empirical information, on the other hand with limited resources, the adaptation, combination and improvement of existing methods for data collection and analysis is an innovative approach with significant potential.

A pilot survey was conducted in an environment that allowed direct observation of the ask-response process. This methodological test used a combination of two data collection methods - an electronic survey and a virtual group discussion. The paper describes the authors' experience with the integrated 'quanti-qualitative' research approach to data collection and the main aim is to present an analysis of its advantages and disadvantages. In 2008, a test survey was conducted in the internet forums of bg mamma with a sample of respondents and by using the advantages of virtual group discussion, the influence of the question wording on the response process was analysed. The discussion topic contains an electronic survey and a virtual group discussion. The paper presents evidence that question wording has a key influence on the response formation process. The combination of qualitative and quantitative methods of gathering empirical information allows the researcher to record respondents' reactions to question perception and response giving. This methodological innovation contributes to enrich the research cognitive capacities at the "pilot study" stage to optimize the quality of the research instrument.

7.6.) Markova, E., (2012) Youth perceptions of political messages - etude in six words. In: *Contemporary Challenges in Science*, SSB, Sofia, (in Bulgarian), ISSN (online):1314-0825, available at: <http://www.tksi.org/SUB/papers/3-1/3-2-12.pdf>

Маркова, Е. (2012). Младежкото възприемане на политически послания - етюд в шест думи, В: "Съвременни предизвикателства пред науката", 179-185, София, Съюз на учените в България, *достъпно на адрес* <http://www.tksi.org/SUB/papers/3-1/3-2-12.pdf>, <http://www.tksi.org/SUB/Broj2012.htm>, ISSN (online):1314-0825.

When a group of society (people aged 18-25, disabled, members of vulnerable groups, those living abroad, etc.) does not participate in elections, this has a significant impact on the implementation of the democratic principle of majority representation. It is often argued that young people are the most passive group in Bulgarian society, especially when it comes to elections. This article aims to spark a scholarly discussion on the mechanisms that determine young people's perceptions of political messages.

The analysis is based on specially constructed tests, conducted among approximately 300 first year students of the discipline "Economic Sociology" at the University of National and World Economy - Sofia, to analyze the mechanism of decoding political messages through content analysis, associative and semantic analysis. Tracking the special and popular literature related to electoral attitudes, we have the impression that the potential of young voters is not in the focus of politicians, social scientists, public scientists. Creativity, analytical drive and youthful zeal are extremely valuable not only in analyzing specific policies and practices. They are the basis for building a modern vision in Bulgarian society and politics. Young people are an indicator of the requirements of modernity - as they see and understand it, as they would need it in their daily lives.

7.7.) Markova, E. (2012). Interactive approach in acquiring knowledge of economic sociology in the first university year - lessons learned. В: „*Science, Education and Art in 21st century*”, Благоевград.

Quality teaching and learning process is a challenge that the teaching staff of the university faces every day. Preliminary analysis of the available information shows that universities operate according to an internal normative document related to the organisation of the learning process. However, the construction (content and method of delivery) of a university course is a creative process, an art, and depends entirely on the willingness, ability, professional and practical convictions and objective constraints that the teaching staff possess. Sometimes lecturers can feel isolated from the audience, as if they are explaining the subject to a very limited group of students, especially when lectures are based on so-called passive, traditional teaching. This paper presents a systematization of the existing scholarly discussion on traditional versus progressive teaching, selected specific definitions of active and interactive learning through practical experience to develop a thesis on the effectiveness of the active approach in university teaching in Bulgaria. The main focus is on the practical experience of using (inter)active approach in studying the discipline of Economic Sociology with first year students at the UNWE - Sofia in 2011-2012 academic years.

Social networking services as well as the introduction of information and communication technologies (ICT) in open urban spaces increasingly lead students to expect that interactive learning will be an integral part of their education. The use of interactive technologies in learning is now as natural as the use of pencil and paper was for past generations. We have to admit that the image of the motivated and obedient student, who, like a 'tabula rasa', absorbs knowledge, sits and listens in the classroom, is old-fashioned. He has been replaced by an independent person, self-motivated to cooperate with the lecturer, already experienced, seeking evidence, curious, critical and open. The paper concludes with a focus on lessons learned, challenges and potential in using an active learning approach in undergraduate teaching, practical limitations and opportunities for optimization effective in achieving greater student participation in the learning process.

Studies published in scientific journals, refereed and indexed in world-renowned databases of scientific information

8.1.) Markova, E. (2019). Working and ageing in low-quality jobs: examples from waste collection and construction in Bulgaria. *Revista Inclusiones*, 6, Editorial Cuadernos de Sofía, Santiago – Chile, ISSN:0719-4706, 279-291, available at: <http://revistainclusiones.org/index.php/inclu/article/view/1981>

The study presents a sociological analysis of ageing processes and vulnerability to unemployment among low-educated, low-skilled workers employed in waste collection and construction in Bulgaria, two sectors with low-quality jobs. For most workers, employment in waste collection or construction is the only option to remain in the labour market. The majority of those employed in waste collection are illiterate and unskilled, and some have previous experience in construction, the steel industry, etc. Construction workers aged over 50 are particularly vulnerable to unemployment due to ill health and lack of skills. This study presents an analysis of the original employment trajectories of workers in the refuse collection and construction industries in Bulgaria in order to problematize the initial 'obviousness' of the relationship between ageing, education and vulnerability. It systematizes the main labour trajectories that can be typified in the two sectors - waste collection and construction - vis-à-vis low-educated and low-skilled workers. The analysis is based on original qualitative empirical data from case studies in the garbage collection and construction sectors with low-paid and low-skilled employees in Bulgaria.

Both economic sectors studied have similarities in the quality of work and the quality of the workforce - low pay, low quality working conditions, low job security and vulnerability in the event of unemployment. Education and age are very important factors for these low-skilled, low-wage employees in refuse collection and construction to remain in the labour market. In garbage collection, all employees, men and women, identify lack of education as the main barrier to finding better jobs and a higher quality of life, away from poverty. In construction, older employees face a limitation to perform physically demanding jobs or work outdoors due to ill health. The study

presents a typology of work and life trajectories that could be used in a sociological analysis of problems in sectors with predominantly low-skilled employment and problematic working conditions.

8.2.) Holtgrewe U., **Markova E.L.**, Ravn J.E. (2015) A Hard Job Is Good to Find: Comparability, Contextuality and Stakeholder Involvement in European Job Quality Research. In: Holtgrewe U., Kirov V., Ramioul M. (eds) Hard Work in New Jobs. Palgrave Macmillan, London, *достъпна на адрес* https://doi.org/10.1057/9781137461087_2

This paper conceptualises the methodological approach and challenges in the research work of a large-scale international research project. In international research projects, partners and data often come from different research backgrounds and adhere to different theoretical perspectives and research paradigms. Scientists from different countries need to collaborate as effectively as possible in what is often a temporary research consortium whose composition is based on different expertise, previous collaborations or chance, unforeseen encounters. Consequently, the study of work and its quality in a European context presents a number of interesting methodological, conceptual and organisational or practical challenges that confront both the levels of comparative analysis and the research process as a whole. Are we researching, comparing workers and their jobs, sectors and companies or countries, or are we seeking to paint a complex picture that explores the interrelationships between all these levels of analysis? In exploring a complex and multifaceted reality, how do we make the scientific findings useful and relevant for policy makers, social partners, managers and activists? In navigating a research project through all of these questions, we encounter a range of possibilities and constraints, as well as trade-offs between different research objectives and logics. It is worth reconstructing these stages to gain some insight into the possibilities and insights, and the specific context of project-oriented research on the working lives of Europeans.

8.3.) Markova E.L., Sardadvar K., Poggi A., Villosio C. (2015). Low-Paid but Satisfied? How Immigrant and Ethnic Minority Workers in Low-Wage Jobs Make Sense of Their Wages. In: Holtgrewe U., Kirov V., Ramioul M. (eds) Hard Work in New Jobs. Palgrave Macmillan, London, *достъпна на адрес* https://doi.org/10.1057/9781137461087_10

The "Good job" consists of concepts of wages as economic compensation, work as social status, and job satisfaction as a subjective psychological criterion, and represents individual labor market performance in terms of workers' lifetime outcomes (Bang and Lee, 2006). Job satisfaction depends in particular on objective working conditions as well as subjective factors (among them Esterlin 2001; Frey and Stutzer 2002; Diener et al. 1999; Clark and Oswald, 1994, 1996; Poggi, 2010). As a rule, jobs characterised by low wages and low status are associated with low levels of job satisfaction (Eurofound, 2013b). However, this is not always the case. The paper analyses different interpretative models on the perception of wages by migrants, immigrants or members of ethnic minorities who are

in low-wage employment. The sociological analysis is based on six qualitative case studies from three European countries and sectors - domestic cleaning in Austria, elderly care in Italy and waste collection in Bulgaria.

Studies published in non-refereed peer-reviewed journals or published in edited collective volumes

9.1.) Markova, E., (2018) Contemporary Practice of Survey Sampling in Bulgaria –challenges and decisions of the survey agencies, In: *Inequalities and social (dis)integration in search of togetherness*, East-West publishing house, ISBN: 978-619-01-0188-8 (In Bulgarian)

Маркова, Е. (2018). Съвременната практика на извадковите изследвания в България – предизвикателства и решения на изследователските агенции. *Неравенства и социална (дез)интеграция: в търсене на заедност*, Издателство Изток-Запад, ISBN: 978-619-01-0188-8

The study presents an in-depth methodological analysis of the current (2011-2017) challenges, existing approaches and methodological solutions in conducting representative sample surveys in Bulgaria. Despite recent trends in international research practice towards a wider use of non-stochastic samples, representative sample surveys still occupy a leading position in Bulgaria. However, the Bulgarian scientific community does not pay enough attention to the current problems with representative empirical studies, and there is no discussion of analyses of practices and approaches in planning and conducting such studies. Private research agencies do not publicly present their practical experiences and analyses of sample surveys. The conclusions and comments in the study are based on the authors' empirical research through expert interviews with leading sociologists from private research agencies in Bulgaria. Relative advantages and disadvantages of stochastic sampling methods used in the agencies are analysed. The main practical approaches to finding solutions to the challenges of planning, conducting and analysing representative surveys in Bulgaria are systematised and critically discussed.

9.2.) Sardadvar, K., **Markova, E. L.**, Poggi, A. (2017). The satisfaction paradox revisited, *La nouvelle revue du travail* [En ligne], available at: <http://journals.openedition.org/nrt/3349> ; DOI: <https://doi.org/10.4000/nrt.3349>

The theory discusses that jobs characterized by low wages and unprestigious status should be associated with low levels of job satisfaction. The purpose of this study is to shed light on the puzzle that emerges in some sectors and occupations where migrants and ethnic minorities with low-wage, low-status jobs demonstrate high levels of job satisfaction. Based on qualitative empirical data from

the Austrian domestic cleaning, Bulgarian waste collection and Italian elderly care sectors, four patterns of wage interpretation are typified: (i) "Better than nothing" - lack of alternatives; (ii) "Better than before" - legacy of past experiences; (iii) "Better than there" - comparison with country of origin; and (iv) "Getting along" - wage as a contribution to family income. The study presents evidence that adverse life circumstances and subjective, personal interpretations of pay rates motivate workers to lower their expectations and to increase their job satisfaction.

In this paper, empirical evidence from qualitative research has been analysed that may enhance our understanding of the satisfaction paradox. Four patterns of wage interpretation have been presented that are linked to the relative income and adaptations theory. They were identified in all three countries, but the contexts differ: The instances of satisfaction are located on different income levels in the examples presented. In Bulgarian waste collection, they refer to the existential level of being able to afford to live and contribute to feeding a family. In Austrian cleaning, the questions that arise refer more to the fairness of payment and the low status of the job, to wage differences between female and male employees and to how to get by on a part-time wage. In Italian elderly care, dissatisfaction refers to the unpredictability of wages due to non-guaranteed working hours and the low job status. This analysis is based on low-wage jobs, but while Austrian cleaning has a rate of pay similar to that of other low-paid jobs in that country, Bulgarian waste workers' wages are close to the poverty line, while the minimum wages of Italian care staff are lower than those in other sectors, and are at the time of writing being pushed further downwards.

9.3.) Kirov, V., **Markova, E.**, Peycheva, D. (2017). Hybrid work organisation in the construction sector in Bulgaria: employees or sub-contractors? In: *Employment and Economy in Central and Eastern Europe*, 01/2016, Emecon.eu, ISSN: 2191-7078, available at: <https://emecon.eu/index.php/emecon/article/view/40/31>

The study explores hybrid employment and work organisation practices contributing to labour market flexibility in the construction sector in Bulgaria. Although the formal economy is usually assumed to be separated from the informal economy, authors such as Williams (2003) draw attention to a 'hybrid', semi-formal employment practice in which formal employees receive two wages from their formal employer: one declared and the other undeclared. The study presents evidence that in the context of Southeastern Europe this phenomenon is accompanied by additional arrangements that blur the boundary between formality and informality. In the construction sector in Bulgaria, work teams ('brigades') are formally hired by a construction company, but de facto act as subcontractors as the 'leader' of the brigade negotiates terms with the employer, manages the team and distributes their wages. The study explores the implications of this hybridisation for employment status, working hours, wages and work skills, using three case studies conducted as part of the European comparative research project WALQING (Work and Life Quality in New and Growing Jobs).

9.4.) Kirov, V., E. Markova, D. Peycheva (2013) Action Research: An Example of Adapting and Applying Active Sociological Surveying in Bulgaria. *Sociological Problems* 1-2/2013, pp. 67-90, available online: <https://www.ceeol.com/search/article-detail?id=195639> (in Bulgarian).

Киров, В., Маркова, Е., Пейчева, Д. (2013). Изследване чрез действие: пример за адаптиране и прилагане на активно социологическо изследване в България. *Социологически проблеми*, 1-2, Институт за изследване на обществата и знанието, ISSN:0324-1572, 67-90, достъпна на адрес: <https://www.ceeol.com/search/article-detail?id=195639>

The study sheds light on the methodological principles of "active research" (AR), an interactive approach outside the traditional research arsenal that places the researcher in the non-traditional role of an "active participant" engaged in changing social processes, in solving specific problems, the subject of sociological research. What is innovative and particularly valuable about this approach is that researcher and researched, the subject and the object of study, work together to solve a specific practical problem or to verify a scientific assumption in practice. Sociology usually studies social processes without influencing them, and the understanding of the sociologist is that of a 'peripheral but all-seeing observer'. The 'embedded researcher' aims, by using his or her scientific knowledge and professional skills, to influence and deliberately change a particular locality, in collaboration with the object of study.

Active research is applied in a number of scientific fields - sociology, psychology, pedagogy, economics, management, and others. The study justifies the possibilities of applying the innovative approach to the needs of sociological analysis. To this end, the global research experience is also presented, focusing on the diversity of research methods used within AR, the advantages and limitations of the approach. Some methodological challenges in the application of this research approach in Bulgarian practice are presented by sharing concrete experience from active sociological research within the international comparative research project WALQING.

9.5.) Markova, E. (2013) Who sweeps the street? Why the Bulgarian sweepers are vulnerable and privileged to be employed? Empirical evidences about the phenomenon: low paid job, low social status and relatively high job satisfaction. In: *Addressing quality of work in Europe*. Sofia (in English), Ciela. ISBN 978-954-28-1373-6 (in English), достъпна на адрес <https://ciela.bg/knigi/nehudozhestvena-literatura/ikonomika-i-schetovodstvo/addressing-quality-of-work-in-europe/>

The study aims to present an in-depth scientific explanations of the phenomenon: high job satisfaction - low-wage, low-status work, using new qualitative empirical evidence and comparing the vulnerability of Bulgarian sweepers and their opportunities to remain in the labour market. Being a street sweeper is a low-wage, low-status job, but appears to be associated with relatively high levels of job satisfaction. People from the Roma ethnic minority work mainly in the urban cleaning sector in

Bulgaria. Workers have low qualifications and often have not even completed primary education. Sweepers are mostly women, but men are increasingly entering such positions, mostly due to the economic crisis and more limited job opportunities. Roma women who work as sweepers have limited employment or career opportunities in general. Most of them have not completed their primary education due to the traditional early marriages of the Roma ethnic group.

The working conditions and private lives of Bulgarian sweepers need further research. The low social prestige of this employment should be improved through active national communication campaigns to the general public. In order to support the expression of opinion and protection of sweepers' labour rights, it is essential to convince management to initiate consultation and information practices. The analysis is based on two case studies in waste collection companies and a study of individual scavengers' perspectives, researched within the WALQING project.

Published chapter of a collective monograph

10.1.) Markova, E. and Yordanova, G. (2019). "What is hidden behind the "obvious"? SHARE data raises the curtain about health, early retirement and elderly care of ageing Bulgarians." In *Health and socioeconomic status over the life course: First results from SHARE waves 6 and 7*, edited by A. Börsch-Supan, J. Bristle, K. Andersen-Ranberg, A. Brugiavini, F. Jusot, H. Litwin and G. Weber. Berlin/Boston: De Gruyter. 179-186. ISBN: 978-3-11-061723-8 (E-Book: 978-3-11-061724-5 and E-PUB: 978-3-11-061745-0), *достъпна на адрес:*
<https://www.degruyter.com/document/doi/10.1515/9783110617245-018/html>

This chapter presents for the first time a sociological analysis of empirical data on people aged 50 and over in Bulgaria within the framework of the Survey of Health, Ageing and Retirement in Europe (SHARE). Bulgaria is the country with the most severe demographic crisis in Europe and is also among the fastest ageing countries in the world (United Nations, 2015). What lies behind Bulgaria's apparently unprecedented ageing? What research space is open for knowledge-based policies? The SHARE data are essential for understanding the impact of ageing in Eastern Europe relative to the EU, and Bulgaria is an outstanding example of a rapidly ageing society. The chapter presents an analysis of results from SHARE Wave 7 national data on health and attitudes towards early retirement and elderly care: general physical health in Bulgaria; early retirement plans and family networks.

The preliminary conclusions derived from SHARE data indicate the problematic health status of Bulgarians over 50, which is in line with their inactive relationship with the health care system. From a comparative perspective, the subjective self-assessment of general health provokes our research interest for further analyses: why do Bulgarians demonstrate higher self-assessments than Romanians, Croatians and Germans? Probable explanations might be the tendency of Bulgarians to overestimate their health, to negate health problems and to rarely take preventive health actions.

10.2.) Kirov, V., E. Markova, E., D. Peycheva (2014) Forced flexibility and job insecurity. Sociological Analyses of quality of work in construction and waste management in Bulgaria. Sofia, East-West publishing house, ISBN 978-619-152-546-1 (in Bulgarian).

Киров, В., **Маркова, Е.** Пейчева, Д. (2014). *Принудителна гъвкавост и несигурност на заетостта: социологически анализ на качеството на труда в секторите строителство и сметосъбиране в България*. Изток Запад, 263 с., ISBN:978-619-152-546-1.

In the context of the financial and economic crisis that began in 2008, quality of work seems to be receding from the top of the European agenda with a view to safeguarding jobs, but remains a key element of the European social model. Quality at work is also a particular focus of the Europe 2020 strategy, which is geared towards 'smart, sustainable and inclusive growth'. The focus here is on working conditions and, in particular, the impact of newly created jobs on the quality of work and employment of workers. This book comes at a time of crisis and prolonged unemployment, when for the majority of workers job retention is a priority and working conditions take a back seat. At a time of economic growth and employment creation, workers place greater importance on employment and working conditions, and make expectations of their employer relating to work organisation, contractual relations, and representation in the workplace. This research study is conducted in sectors where a period of growing employment is followed by a drastic reduction of workers. The main question we ask in this book is what is the quality of work in Bulgaria in economic activities such as construction and refuse collection, often associated with job insecurity, low pay and low prestige. The analysis illuminates the impact of forced forms of flexibility in employment conditions and the job insecurity they generate, as well as some implications for workers. It focuses on construction and refuse workers' perceptions of their degree of job security. Objective and subjective factors of job insecurity are defined. The impact of the main elements of working conditions - the form of employment, working hours and pay - as determinants of job insecurity is analysed. The second chapter addresses issues of the quality of working conditions. The objects of study are the organisation of work, the acquisition of skills and the 'voice' of workers. Based on the analyses in the two sectors we consider, we can show the negative consequences for workers, as well as the existence of some compensatory mechanisms. Chapter three seeks to strike an explanatory balance on the controversy of whether the 'working poor' are privileged for a certain type of employment or are vulnerable in the case of unemployment. To this end, it briefly reviews various theoretical concepts and empirical evidence on the phenomenon of the 'working poor'. The theoretical framework of the subsequent analysis is justified in terms of theories of personal well-being and job satisfaction through the lens of quality of work and life. Some problems in the working conditions of the working poor in refuse collection and construction are described. The main focus is on outlining the common work trajectories of construction workers, garbage collectors and sweepers. A special place is given to an analysis of the subjective satisfaction of garbage collectors and sweepers through the lens of the satisfaction paradox (Festinger, 1957), and some possible explanations for why some low-wage

workers with low social status declare high (subjective) satisfaction with the problematic working conditions in a low-wage and low-prestige occupation such as garbage collection and street sweeping are discussed. The conclusions of the paper highlight the main findings regarding precariousness and imposed flexibility. In this sense, the observed reality is substantially different from the expectations of labour administration (and employment policies in general). The known formalisation of informal practices has been limited during the crisis and employers are shifting the uncertainty of markets (partly or fully) onto workers. The dual labour market persists, with a certain number of employees having some certainty about their contracts, the rest being dependent on the conjuncture. The organisation of work is characterised by complex interactions between formal structure and the autonomy of teams. Opportunities for training, representation and career development are limited. The flexibility imposed by the crisis has in some cases also led to pay restraint (due to reduced workloads and periods of interruption) and this is a further factor in the reproduction of the 'working poor'.

The book is edited by V. Kirov. The introduction and the conclusion were developed jointly by the three authors. The first chapter was prepared by D. Peycheva, the author of the second chapter is V. Kirov. The third chapter is written by E. Markova.