Research at the Bulgarian Academy of Sciences
Panel 4 Report: Social Sciences, Humanities

Volume 5 of 5
1. Overall summary of the Institute-level scores

In this section, the scores given to all Institutes for the three criteria are summarised.

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<tr>
<th>No.</th>
<th>Institute Name</th>
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<th>Relevance</th>
<th>Prospect</th>
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Introduction

The Museum and Institute of archaeology have been close to the core of the BAS activities ever since its inception in the 19th century. The current combination (NIAM) was established in 1948 on the basis of two much older institutions; the institute’s relevance as a national resource of expertise has been acknowledged by successive adjustments to its legal status, all the way to the most recent one in 2007. The structure of NIAM recognises six central academic sections, two decentralised branches, and important elements of research infrastructure, such as library, archives and a laboratory. Of the 128 staff (status beg. 2008), 106 hold a relevant university degree. The division of staff over the six scientific sections indicates an obvious emphasis on pre-modern archaeology:

- Prehistory (staff 13);
- Thracian Archaeology (staff 12);
- Classical Archaeology (staff 13);
- Medieval Archaeology (staff 14);
- Numismatics and Epigraphy (staff 4);
- Department of Interdisciplinary Studies (staff 6).

Staff at the two provincial branches in Slumen (staff 9) and Veliko Trnovo (staff 6) and the “National Museum of Archaeology” (staff 19) and at the infrastructures are listed separately.

NIAM is a very complex structure, but is firmly inscribed in the national scientific environment as national centre and coordinator of all field archaeological investigations on the territory of the Republic of Bulgaria. It exercises academic and methodological control over them and is the prime collaborator for international teams. Domestically, NIAM organizes the annual reports on the archaeological investigations all over the country, and convenes the annual “National Archaeological Conference”. As the SER puts it, “in view of the nature of the archaeological heritage as a public state property, all the basic activities of the Institute represent academic service to the Bulgarian State and society within the conditions of market economy and civil society.

Evaluation Summary

The panel has come to the conclusion that overall NIAM shows a very good performance in terms of quality and productivity during the period under review. The overall score in quality and productivity, also bearing in mind comparable institutes abroad, is “A” for “work that is internationally competitive. The Institute has demonstrated important contributions to the field and is considered an international player”.

NIAM deservedly occupies a central position in the field in Bulgaria and fulfils a crucial role in the provision of expert services to a country immensely rich in
archaeological treasures and undergoing rapid and massive construction works as part of its transition into the European Union. Thanks to the museum and regular exhibitions at home and abroad the visibility of NIAM beyond academia proper is very high indeed. The overall score in terms of relevance is therefore “A”; its work is “highly relevant” to the wellbeing of Bulgarian society.

The Panel concludes that overall a convincing strategy has been developed for the coming years, well planned and realistic and conforming to what would also be high priorities at an international level. Leadership and management seem to be well in place. The Institute has the potential to strengthen the already broad international cooperation in the coming years, also in terms of funding for large scale projects through participation in international consortia. Internationalization can be further strengthened at other points, but there are all the bases to do so successfully. The very close connection between Institute and Museum seems to function very well; despite the complex structure, synergies are such that structural changes on this point are not to be recommended. In line with a challenge common to practically all BAS institutes, the NIAM leadership will have to develop specific plans to gradually change the age profile of scientific staff (only 10 staff are currently under 35) and to increase the number of PhD degrees awarded. Overall, the score for prospects is “A” or “high”.

**Evaluation Report**

**a) Quality and Productivity**

**Quality** (international recognition and innovative potential)

**Strategy**
The strategy presented in the SER is a sensible and convincing combination of continuity and renewal. Some of the new elements, for example new investigations of metallurgy and metal processing in Thrace, can be done in close cooperation with BAS research units from science disciplines. This strengthening of interdisciplinary collaboration with other science fields and their analytical methods is conducive to methodological innovation which during the last decade has allowed archaeology to gain new insights. The successful translation of this trend in Bulgaria with the help of other BAS institutes promises to yield a new understanding of the mobility of people, technologies and artefacts. The Institute has already built strong collaborations with a number of relevant scientific institutes inside BAS and also abroad, thus making the best of the specific structure of BAS.

Overall the institute provided evidence for a convincing pattern of multiple collaboration with many other BAS institutes in other fields of science, all dictated by real research questions (such as: Institute of Experimental Morphology and Anthropology with Museum; Geo-physics; Organic Chemistry with Phytochemistry Centre; Solid Physics; Nuclear Studies and Nuclear Energetic; Central Laboratory of Optic Recording and Processing of Information; Institute of Mechanics; National Museum of Natural History; Central Laboratory of Mineralogy and Crystallography;
Institute of Geology; Central Laboratory of General Ecology. On other matters, a multitude of contacts exist with specialist analytical facilities elsewhere abroad. This impressive background of existing and possible collaborations with scientific disciplines indicates that a separate department for interdisciplinary studies no longer corresponds to the ways, archaeological science is conducted. It should be abolished, unless it serves for training purposes alone, as such approaches as listed (at least a good understanding of their usefulness to resolve certain research questions) need to be part of the standard postgraduate training of archaeologists.

An important element in the strategy is the digitalization of the archives which should be a top priority; this may allow for integration into broader European contexts of data sharing.

A further strengthening of international collaboration is welcome, especially through European research programmes. Given the academically and administratively central position of the institute in Bulgaria, such collaborations will benefit under conditions of easier transfer of resources and people within the EU. Contacts and collaborations at the inter-academy level and with specialised research institutes in the West and in the East (including the non-European East) are all in place.

**Performance**

The organization of research work in archaeology demands a combination of different expertise and is therefore based on team work. The way NIAM is organising its work is based on this principle: NIAM teams, whenever necessary and appropriate, include scholars from other BAS institutes, from universities, and from museums, and often operate in collaboration with international partners.

**Internationalization**

NIAM has an extensive international collaboration including joint field research, laboratory work and training of students and postgraduate students. During the period under review the Institute had eight international projects based on contracts at BAS level. At institute level, a further thirteen projects with relevant international participation were reported. For both types institutions from 19 countries were listed. The projects reported cover a wide range of themes, but the majority is concerned with archaeological sites or artefacts in Bulgaria; often the international collaborations include elements of on-site training, which is current practice but nonetheless as such praiseworthy. International collaborations also include exhibitions abroad, which can provide clear added value in terms of service to society (cultural tourism!).

During the reporting period the number of articles published in foreign journals was about 1.5 per scholar (total 105 articles). About ten scholars have produced more than two articles abroad. The 114 contributions to conference papers abroad are the results of less than half of the total number of scholars employed at NIAM. NIAM clearly needs to improve the performance of its researchers on this point.
Despite the institute’s own very substantial publication activity, which includes journals with international boards, only six staff members serve on editorial boards of foreign scientific journals (most of them not of top rank). This is not satisfactory. Articles published in Bulgarian research journals (550) are mostly written in Bulgarian, but in most cases have useful summaries in English or French.

A clear indication of the international role of some of the NIAM scholars is the fact that they are invited to take part as specialists in archaeological projects abroad; scholars from the Institute participate as experts in several foreign institutions.

Nine scholars had stays abroad during the period under evaluation, and the number of participants in congresses abroad are listed as 75 (to 20 different countries). Both figures could be improved: the Institute (or, indeed, BAS through some special support scheme) should actively plan for more of its scholars to contribute to international conferences. On the other hand it is a sign for the Institute’s international recognition that no less than 40 foreign scholars have visited the Institute, mainly in connection with bilateral agreements with BAS or institute-to-institute collaboration. Teaching collaborations with four foreign institutions seems to be at the appropriate level.

The web presence of the Institute is informative for colleagues abroad, but could show more in terms of news, both discoveries, outreach activities and ongoing excavations: for these are all activities, which add significantly to the good visibility and reputation of the institute both domestically and internationally.

**Position in the domestic context**

NIAM has a strong and widespread scientific interdisciplinary co-operation with a number of BAS institutes in the sciences and the humanities and with relevant universities in Bulgaria. This co-operation typically takes the form of formal contracts as emerging or already existing consortia, of which at least one has won a competitive grant of the Ministry of Education and Science. NIAM is very well placed for new funding rounds which seem to encourage cross-institutional (and, by implication, cross-disciplinary) work.

Strong co-operations also exist with national, regional and municipal museums, including joint fieldwork, joint publications etc. Collaboration with institutions concerned with the national infrastructure and local administrations are also among the assets of NIAM. With increasing foreign and local investment going into large-scale infrastructural developments and upgrades (notably: road, rail and water traffic; water and energy supply) NIAM attracts important third-party contracts for legally obligatory rescue excavations.

NIAM functions as the chief coordinator of all field archaeological investigations in Bulgaria and therefore fulfils a central role in the entire institutional set-up of Bulgaria. A special commission within the Institute controls the quality of the archaeological field work in Bulgaria and a copy of documentation goes to the national archives of archaeological research at NIAM. The structure is highly commendable as it links, institutionally and intellectually, the expanding sector of rescue excavations to the best available expertise in the country and ensures
accurate and accessible documentation. Expert activity of NIAM staff is impressive on all accounts, both at national and international level.

In purely academic terms, NIAM organizes the national annual archaeological conference, which provides a platform of great importance for discussions, dissemination of research results before publication etc. The important project ‘Archaeological Map of Bulgaria’ has been much improved by the introduction of GIS technology and is an important reference point with the continuously expanding excavation work coordinated by the institute all across the country.

The five chosen scientific achievements all concern excavations; they may all be considered of international importance. Also the five most important applied achievements are mainly concerned with archaeological field work of importance also outside Bulgaria.

The number of PhD students is 27 (with only one from abroad - this number could be higher) and 10 degrees have been awarded during the period. Here is the panel sees room for improvement, which may be achieved through even better cooperation with university institutes. Since the institute can also be said to be playing a leading role in the region – e.g. in terms of Thracian archaeology – international recruitment may also be improved.

**Productivity** (scientific output and international standing)

*Projects*

The total number of projects is no less than 277. A substantial part of these are, as it should be, team-work based “rescue” excavations etc., but some area also individual studies.

25 projects are funded solely by the internal institute budget. 63 projects are supported through contracts with ministries and private companies. 29 projects have benefitted from additional international funding from sources as diverse as: EU, NATO, ESF, UNESCO, PHARE etc. 24 projects are partly funded under BAS bilateral agreements and institute-to-institute cooperation. No less than 123 projects are described as being commissioned from third parties, including state or private companies from across the country (a substantial part of these are indeed “rescue” excavations) and from abroad.

Six projects have attracted additional funding through the competitive schemes of the Bulgarian NSF. This comparatively small number – small for a successful and internationally recognised institute – can probably be explained by the increasing burden of work due to “rescue” excavations which leaves little room for additional applications. The Institute is aware of the risk not to let the urgency of and income arising from “rescue” excavation thwart the need for methodological innovation which cannot easily be achieved under such conditions. For this reason, the cross-BAS interdisciplinary contacts are very useful.
The specificity of the Museum-based activities has been taken into account by the Panel, but is not fully reflected in this report. It is clear that the presence of the Museum is an asset, both scientifically (reference collections) and in terms of outreach (visibility; expert staff for preparation of exhibitions). The combination of institute and museum significantly enhances the standing of the institute; this unified approach to research, preservation and presentation must therefore be preserved as it is. Future museological work envisaged by and for NIAM as part of the national strategy is likely to further improve the current state of affairs at the Museum.

**Publications**

During the reporting period, institute staff published 105 scientific papers in foreign journals, as well as c.550 articles in different Bulgarian scientific journals, of which some are provided with useful summaries in English (especially those in journals and collections published by NIAM itself). Of all of these, a decent percentage has appeared in journals that are internationally recognised within the community. 114 published papers resulted from conferences abroad, but only 46 of the scholars of the Institute have such papers; no less than 455 refer to conferences in Bulgaria.

The Institute itself edits no less than 15 scientific journals and series and has a remarkable productivity on that point. *Archaeologia Bulgarica* is published in a number of languages and has an international editorial board. Panel members felt that it would be a service to foreign readers if not only summaries in English (or other international languages) but if also captions were translated; international visibility and reception of the findings would be likely to benefit, too. The Panel was reassured to find that several foreign researchers are on the boards of these journals.

In terms of scientific books, the panel recognised six titles published abroad (the SER lists seven, but one title is a contribution to an exhibition catalogue) as well as 43 published in Bulgaria, of which some have been written in languages other than Bulgarian. Some titles can be identified as contributions to anthologies. This corresponds to a good level of activity. Interestingly, no textbook seems to be listed among the titles, which can be read as another indication of the very strong research focus of the institute.

Altogether the above indicates a very good productivity, particularly when taking into consideration that archaeologists tend to spend much time on field work before publication.

The panel has come to the conclusion that overall NIAM shows a very good performance in terms of quality and productivity during the period under review. The overall score in **quality and productivity**, also bearing in mind comparable institutes abroad, is “A” for “work that is internationally competitive. The Institute has demonstrated important contributions to the field and is considered an international player”. The Institute is an attractive partner for other leading archaeological institutes in other European countries and countries beyond Europe.
b) Relevance (socio-economic impact)

Apart from the general intellectual contributions to knowledge about the past of the nation through publications and outreach – a knowledge all the more precious as it is presented in scientific, not in ideologically tainted terms – the existence of a strong group of experienced researchers at NIAM is fundamental in order to meet the challenges that the archaeological heritage of Bulgaria is facing in times of accelerated socio-economic change, induced by the transition from socialism and, more recently, the integration into the EU. Increasing investment in large-scale infrastructural developments (transport; water and energy) means that NIAM’s role as prime partner for rescue excavations and as coordinator and de facto academic supervisor of all field archaeological investigations in Bulgaria has been strengthened. If anything, its staff should be increased. The fact that a special commission within the Institute controls the quality of archaeological field work in Bulgaria is a highly commendable structure as it links, institutionally and intellectually, the expanding sector of rescue excavations to the best available expertise in the country. The same goes for the institute’s control over accurate and accessible documentation of such excavations. The expert activity of NIAM staff is amply documented and testifies to the relevance of their work, both in national and international contexts.

It should not be underestimated that the outreach activities (exhibitions) and the extensive archaeological field work (e.g.: creation of archaeological parks) can be and are important elements contributing to the growth of cultural tourism, which will eventually further diversify the tourism product of Bulgaria.

The institute provided convincing evidence for its active role in supporting / developing heritage and tourism activities, e.g. projects of trans-border cooperation of the PHARE Programme, focusing on the transformation of archaeological sites into top tourist destinations; the participation in the work on an all-Balkan project of Cultural Corridors; regional exhibitions; assistance given to the construction of reception tourist centres. NIAM researchers also prepare and direct projects on conservation, restoration and display of immovable cultural valuables, as some of them further develop to museums in situ. Lecturers from NIAM train personnel and contribute to handbooks on tourism at different universities in Sofia and Varna.

Teaching

The Institute has provided extensive teaching at a number of Bulgarian universities during the period under evaluation. This expert-guided training makes a significant contribution to the education of well-qualified students of archaeology in the country, well-prepared for the labour market in their field. The total sum of academic hours can even be considered as being too high for staff at a research-heavy institute, certainly in the first part of the period, but it has later been reduced by more than one third (from 2.040 to 1.365 hours). It has not become quite clear whether this reduction occurred by coincidence or came as part of a deliberate strategy; in either case, it is a welcome development, provided that the concomitant possible reduction of extra income does not lead to young scholars leaving the career.
The list of teaching activities also includes a large number of summer ‘practise’ (field archaeology), schools or seminars – several of them abroad, which is a useful and necessary addition for a strongly field-work based discipline. For example: twelve seminars are listed for 2008 where scholars from the Institute have taught - many of them abroad (Germany, Italy, Russia, Serbia, USA) - together with two post-graduate courses taught abroad by one member of staff.

**Museum**

Clear evidence was provided for the integration of the Museum into the scientific and outreach work of the institute in past, present and future. The Museum and the Institute operate as parts of a single body; their functions are complementary to one another: archaeological finds from field investigations of both institutions enter the depositories of the Museum; field research is carried out jointly; similarly, collective teams organize exhibitions in Bulgaria and abroad. Both museum and institute staff function as editors and authors in NIAM publications. Museum specialists of academic rank can and do direct and review PhD theses in the Institute. There is a coordinated financial administration, which provides much needed and very useful flexibility. The combination of Museum and Institute affords the possibility to NIAM to carry out successfully the task delegated by the new Law for the Cultural Heritage, namely to play a leading role in localization, study, preservation and popularization of the archaeological heritage of the country.

In the view of the panel, NIAM deservedly occupies a central position in the field in Bulgaria and fulfils a crucial role in the provision of expert services to a country immensely rich in archaeological treasures and undergoing rapid and massive construction works as part of its transition into the European Union. Thanks to the museum and regular exhibitions at home and abroad the visibility of NIAM also beyond academia proper is very high indeed. The overall score in terms of **relevance** is therefore “A”; its work is “highly relevant” to the wellbeing of Bulgarian society.

**c) Prospects (vitality and feasibility, management & leadership; future potential and ability of the Institute to tackle new scientific challenges)**

The Panel appreciated the elements of strategic planning presented in the SER and during the site-visits and found them a sensible and convincing combination of continuity and renewal. New investigations of metallurgy and metal processing in Thrace involve close cooperation with other BAS research units from the science fields in a move that promises to rejuvenate archaeology in Bulgaria and to unlock new potential. Against the background of multiple interdisciplinary collaborations within and beyond the context of BAS, the role of a separate department for interdisciplinary studies at the Institute has become obsolete in research terms.

An important element in the strategy is the digitalization of the archives which should be a top priority; this may allow for integration into broader European contexts of data sharing.
The strategy foresees a further strengthening of international collaboration through European research programmes. Given the academically and administratively central position of the institute in Bulgaria, such collaborations are likely to benefit under conditions of easier transfer of resources and people within the EU. The necessary contacts and collaborations at inter-academy level and with specialised research institutes in West and East are in place.

The activities of the Institute and its museum are of great national importance as to the cultural heritage of Bulgaria. The field projects contribute to improving the possibilities for a growth in cultural tourism. NIAM can benefit from the growing need for expertise in “rescue” excavations; if anything, its staff level should be adjusted upwards to be still better able to provide the necessary services to society. It is very encouraging to observe that the expanding activity in “rescue” excavations also allows comparatively younger scholars to function as team leaders, thereby showing their potential for higher responsibilities in the institute and elsewhere.

NIAM has extensive collaborations with a large number of universities and museums in Bulgaria.

Invaluable are its archives of archaeological field work in Bulgaria during the last 50 years and the ongoing project of an archaeological map of Bulgaria.

The Panel sees potential for increasing publications by NIAM scholars in foreign scientific journals.

In terms of internationalization, the already good frequency of visits by foreign scholars can be further augmented. By reserving some money for this specific purpose, the Institute will be able to still better connect with research environments abroad. Such visits could probably be developed jointly with universities, for example as part of graduate training courses. The number of scholars going abroad for longer research stays or for guest lectures could probably also be raised.

The laboratory at the central facilities is up to date, but quite small and - as also staff present during the visit agreed - the capability for conservation of the many objects in the museum and deposits is too limited. Funding should be made available to improve the status quo.

The close connection between Institute and Museum is clearly a benefit to both institutions. The Museum will benefit from museological intervention; a more attractive museum shop and possibly a small café can generate additional income.

The main threat to the otherwise impressive vitality of the institute is the age profile of academic staff. This phenomenon characterises practically all BAS institutes, and NIAM is well aware of the danger. Currently, 51 of the scholars are 51-70 years of age and a further 36 staff fall into the age bracket between 31 and 50. Short of a general critique of the funding of research and scientific recruitment in Bulgaria – it is imperative that the problem is addressed through extra efforts by the institute leadership. A more aggressive marketing of employment possibilities in the sectors of rescue excavation and cultural tourism may be helpful, as could be a scheme of non-salary awards for successful young scholars.
The Panel concludes that a convincing strategy has been developed for the coming years (well planned, realistic and conforming to high priorities at an international level). Leadership and management seem to be well in place. The Institute has the potential to strengthen the already broad international cooperation also in view of funding for large-scale projects through international consortia. Internationalization can be further strengthened at other points, but there are all the bases to do so successfully. The very close connection between Institute and Museum functions well: despite the complex structure, synergies are such that no structural changes are recommended. In line with a phenomenon observed for practically all BAS institutes, the NIAM leadership must achieve a gradual change of the age profile of scientific staff (only 10 staff are currently under the age of 35) and to increase the number of PhD degrees awarded.

Overall, the score for **prospects** is “A” or “high”.

The Institute is considered by this Panel as an internationally competitive research institution and as an attractive partner for other leading archaeological institutes in other European countries and countries beyond Europe.

**Overall Strengths and Weaknesses**

N.B.: some of the “weaknesses” are structural weaknesses of the system, and some are rather points of improvement some of which are also addressed under “recommendations”.

**Strengths**
- Productivity and international visibility of NIAM based research (qualified staff);
- Strong national position as central institution for archaeological excavations (administratively and academically);
- Management and leadership potential (less threatening overall conditions would help);
- International network of scholarly and collaborative contacts;
- Interdisciplinary exchanges and cooperation within BAS and within Bulgaria;
- Inter-institutional network (arising from and crucial for “rescue” excavations);
- Excellent potential for further growth and societal relevance;
- Evidence for good nurturing of emerging talent (young team leaders in rescue excavations).

**Weaknesses**
- Unfavourable age balance among scientific staff: more younger scholars needed; support to be given to PhD candidates to finish their doctoral work in time;
- More support needed for widening international presence (congresses);
- More support needed for laboratory and other ancillary services;
Monitoring by institute leadership needed to achieve a balance between teaching and research activities (an overall policy needs to be implemented, defining the character of BAS scientific staff);

Proactive solutions to be developed in order to achieve balance between workload in “rescue” excavations and necessary advances in basic research (notably making use of the BAS network of institutes).

Recommendations

With an overall “A” for all categories of the evaluation (quality/productivity in an international context; relevance, with a focus on Bulgarian society; and prospects, with an emphasis of potential and ability of Institute and Museum to reach the objectives set), NIAM is one of the leading institutes evaluated by this Panel. However, a number of recommendations might help further strengthen and improve the position of the institute, a strengthening that it would fully deserve. Most of these recommendations reflect concerns already well present in the deliberations of the institute’s leadership. Their listing here is to emphasise that such constructive reasoning is fully endorsed by the international evaluation panel.

- The leadership of the Institute should develop medium- and long-term plans for a gradual change in age profile, working through BAS with the relevant authorities to make it possible that young scholars can be attracted and, if promising, kept; as part of this, the number of PhD students – and hence cooperative arrangements with institutions of Higher Education - could be enlarged; giving responsibilities to younger scholars makes work at NIAM attractive;
- care must be taken as to the ratio between “rescue” excavations and basic research; phrased differently: funds for basic research should be integrated into the financial planning for the funding of “rescue” excavations (e.g.: the Swedish model);
- against the background of multiple interdisciplinary collaborations within and beyond the context of BAS, the role of a separate department for interdisciplinary studies at the Institute has become obsolete;
- the integration of Institute and Museum should continue; the specific skills that students can learn in the museum context could be presented as an asset for a future generation of graduate students;
- the laboratory should be enlarged and receive more funding as part of Cultural Heritage programmes in order to have provide capacity for conservation purposes;
- there is a potential for further internationalization which should not only not be missed, but be actively encouraged, if possible as part of a support strategy operating across BAS.