

OPINION

by Assoc. Prof. Dimitar Georgiev Zlatinov, PhD

Economic Research Institute at Bulgarian Academy of Sciences

Regarding: Competition for the academic position of Associate Professor in the professional field 3.8. Economics (European Public Finance) for the needs of the Economic Research Institute at Bulgarian Academy of Sciences

Grounds for the opinion: Member of the Scientific Jury following Order RD 426/05.07.2024 issued by the Director of the Economic Research Institute at Bulgarian Academy of Sciences

Information about the competition and the candidate

The competition is for the academic position of Associate Professor in the professional field 3.8 Economics (European Public Finance). The competition is announced in the State Gazette, issue 40/07.05.2024, for the needs of the Economic Research Institute at Bulgarian Academy of Sciences (ERI at BAS).

Only the documents of Chief Asst. Prof. Iana Vitanova Paliova, PhD, have been received for participation in the competition. The submitted documents have been prepared in accordance with the requirements of the Act on Development of the Academic Staff in the Republic of Bulgaria and the Rules of Procedure for Acquiring Science Degrees and Holding Academic Positions in ERI at BAS.

Dr. Iana Paliova has a Master's degree in Political Economy from Leningrad State University. In 1997-1999 she specialised in public sector economics at the University of Leicester, UK. In 2017 she defended a PHD thesis on “Fiscal Stimuli and Effects of European Structural Funds in Central and Eastern Europe” in ERI at BAS. Dr. Paliova has gained extensive professional experience in public administration. She has held expert and managerial positions at the National Statistical Institute, the Ministry of Finance and the International Monetary Fund. Her academic career started in 2020 within the International Economics Section of the ERI at BAS. Dr. Paliova's professional experience on international and European economic integration, international economic relations, and public finance is substantial and built in the European Union (EU) projects and programmes.

Meeting the minimum national requirements under Article 26 of the Act on Development of the Academic Staff in the Republic of Bulgaria and Rules of Procedure for Acquiring Science Degrees and Holding Academic Positions in ERI at BAS

According to the report on the fulfilment of the minimum national requirements under Article 26 of the Act on Development of the Academic Staff in the Republic of Bulgaria in the professional field 3.8. Economics for the academic position Associate Professor Chief Asst. Prof. Iana Paliova, PhD, exceeds the quantitative criteria – with a minimum of 450 she has 575 points, including:

- Indicators of group A – PhD thesis – 50 points;
- Group B – habilitation thesis, monograph – 100 points;
- Group D – monograph, including not presented as the main habilitation thesis, and publications (studies, articles, reports and others) in scientific papers of different rank and type, incl. two publications in impact factor indexed journals – 285 points;
- Group E, citations and reviews in scientific publications – 140 points.

It is noteworthy that Chief Asst. Prof. Iana Paliova, PhD, focuses her research activity on fiscal policy and public finance issues in an European context. For the participation in the competition, except the two monographs presented (one of which is based on the defended PhD thesis), the candidate presents 16 publications, 7 of which in English. With the exception of only one, all of the publications listed for the competition were prepared independently which shows Dr. Paliova's capacity and competence to independently research up-to-date issues of fiscal governance in Bulgaria and the EU.

General characteristics of the presented scientific papers

A list of all publications of Chief Asst. Prof. Iana Paliova, PhD, is provided. There are 28 publications so one can get an overall picture of both the scientific interests and the educational-methodological work of the candidate for Associate Professor. I focus on the list of publications related to the competition:

- 2 independent monographs, one of which is presented as a habilitation thesis and the other is prepared on the basis of the defended PhD thesis. The total volume of the two monographs exceeds 500 pages and their subject matter is directly related both to the issues of the academic competition and to up-to-date issues concerning the development of the Bulgarian and European economy.

In the habilitation thesis Dr. Paliova explores the role of public finance for the sustainable development of Bulgaria. She put special emphasis on some fiscal instruments (mainly environmental taxes) and their role in the transition to a low-carbon and climate-neutral economy, analysing the eminent fiscal risks. The analysis provided considers trends in individual Member States and the EU as a whole, demonstrating a thorough knowledge of European economic governance processes. Dr. Paliova trace specific trends and make conclusions and assessments on Bulgaria's fiscal situation. They demonstrate Dr. Paliova's expertise and analytical potential. It is evident that the research work has been brought up to date by linking it to the issues of the green transition and the sustainability of economic development.

- 2 refereed Scopus studies in the Economic Studies Journal on the challenges facing the fiscal sector in Bulgaria during the transition to a climate-neutral economy, as well as on the effects on economic growth stemming from fiscal consolidation.
- 1 study and 11 articles in non-refereed peer-reviewed journals which demonstrate Dr. Paliova's professional competences to critically analyse the processes in the fiscal sector in Bulgaria, considering the European context and challenges in absorbing the EU funds. It is noteworthy that Dr. Paliova participates in several issues of the Annual Report of the ERI at BAS, where she directly addresses the issues of fiscal sustainability and Bulgaria's integration into the new architecture of EU macroeconomic and fiscal governance.

Outside the scope of the competition, but included in the overall list of publications, Dr. Paliova presents contributions on preparing textbooks in the field of public finance and public sector economics. The materials demonstrate her skills in interpreting and integrating theoretical achievements and applied aspects of economic development.

The scientific publications submitted are fully in line with the subject of the academic competition. The quality of the research, its depth, and topicality are appropriate to the level of the academic position of Associate Professor. The citation of Dr. Paliova's publications, including the 9 citations in foreign journals and 5 citations in Scopus, also demonstrates the resonance among the national scientific community and abroad of the issues under study.

Evaluation of the scientific contributions of the candidate

The contributions of Chief Asst. Prof. Iana Paliova, PhD, to the competition for the academic position of Associate Professor are defined in two directions – theoretical and applied.

From a theoretical point of view, Dr. Paliova studies the specificities of fiscal multipliers, fiscal rules, and EU financial instruments, which she links to sustainable development issues. In this way, the concept of sustainability and the green transition sounds in a macroeconomic manner, which is critically reflected upon in terms of benefits and challenges stemming from the experience of developing countries such as Bulgaria, strictly considering the European integration processes and mechanisms. In applied aspect, Dr. Paliova assesses the impact of green fiscal measures on the revenue and expenditure side of the budget which she directly relates to the possibilities of absorbing EU funding. This allows concrete assessments and conclusions both in terms of broader issues (e.g. the impact of EU funds and resources on fiscal sustainability, economic growth, and fiscal consolidation processes in Bulgaria) and more specific issues (such as the impact of environmental taxes and charges on greenhouse gas emissions in Bulgaria, Croatia and Romania) to be made.

The contributions of Dr. Paliova's research and applied work are also reflected in the recommendations made for fiscal governance in Bulgaria, which are linked to European and global trends. This allows the analysis not to sound isolated and out of context, but strictly to adhere to European topics.

Recommendations

I would recommend Dr. Paliova more actively to share her expertise and potential for applied research publicly, including in the media, at home and abroad. Conducting lectures and classes with students would allow for the deepening of skills for analysing and integrating theoretical concepts and their accessible presentation to a wide audience, which Dr. Paliova has undoubtedly demonstrated.

Conclusion

Chief Asst. Prof. Iana Vitanova Paliova, PhD, exceeds the minimum national requirements for the academic position “Associate Professor”, as well as the additional criteria set by the ERI at BAS. As regards the subject matter and quality of the selected publications, they fully cover the field of the academic competition. Considering the rich expertise and managerial experience of Dr. Paliova and her competences for conducting in-depth research on economic

processes under European context, supported by the presented publications and prepared teaching materials, I express my positive opinion Chief Asst. Prof. Iana Vitanova Paliova, PhD, to be elected on the academic position of Associate Professor at the Economic Research Institute at the Bulgarian Academy of Sciences.

5 September 2024

Sofia

Assoc. Prof. Dimitar Zlatinov, PhD