

ATTITUDE OF REVIEWER

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professional field 3.8. Economics

Regarding: competition for the academic position of “associate professor” in professional field 3.8. Economics – Poverty and Social Protection, announced in the State Gazette, No. 44 of 19.05.2023 for the needs of the dep. "Macroeconomics" at the ERI-BAS

Grounds for participation in the scientific jury: Decision of the Scientific Council of the ERI-BAS with Protocol № 7 of 12.07.2023 and Order of the Director No. 369 of 18.07.2023

1. Information about the candidate

The only participant in the announced competition for the academic position of "associate professor" is Dr. Teodora Margaritova Peneva, Chief Assist. Prof. in the dep. "International Economics". The candidate holds a master's degree in two majors - Management of Social Work Institutions (St. Kliment Ohridski Sofia University) and International Economics (Beijing University). After her doctoral studies at the Faculty of Economics at SU, she successfully defended her dissertation on the topic "Analysis of Energy Poverty Research Methods in Bulgaria". Since 2018, Dr. Peneva holds the academic position of "chief assistant professor" at the BAS - initially at the Institute of Philosophy and Sociology and since 2019 - at the Economic Research Institute. She regularly participates in national and international conferences with presentations, a significant part of which covers the subject of the announced competition. The same applies to her active participation in research and applied research projects - in the period after 2017, Dr. Peneva is a contributor to seven projects, two of which are international. She speaks 4 languages - Chinese, English, French and Russian.

2. Fulfilment of the requirements for occupying the academic position of "associate professor" in the Economic Research Institute at the BAS

Chief Assist. Prof. Dr. Teodora Peneva has met and exceeded the minimum national requirements and the requirements of the ERI-BAS for scientific activity for the competition for the academic position of "associate professor", determined by the Regulations for application of Act on Development of the Academic Staff in the Republic of Bulgaria and the Regulations for obtaining scientific degrees and occupying academic positions in the ERI-BAS: the points presented in the Performance Reference are a total of 538, with the minimum required 450 points for occupying the academic position of "associate professor" at the ERI-BAS.

Dr. Peneva meets all other criteria and requirements for participation in this competition:

- holds the doctoral degree, and the dissertation defended by her is on a topic directly related to the research area of the current competition, which is definitely an advantage in view of her progressive professional development;

- for the period of 5 years, with the minimum required 3, she is Chief Assist. Prof., including for 4 years - at the ERI-BAS (she was elected by the Scientific Council of the Institute with Protocol No. 2 of 27.02.2019);

- presents the mandatory habilitation thesis, the topic of which is fully consistent with the research field announced for the competition;

- the accumulated points in indicator group “Publications” are 258 with the required minimum of 230 points;

- the requirement of the ERI-BAS to present at least 2 publications in refereed and indexed editions in world-renowned databases with scientific information for the competition has been met: 2 publications in English in the Economic Studies journal, refereed and indexed in SCOPUS, have been submitted;

- one of the presented publications is co-authored, for which a separation protocol is attached;

- the points in indicator group "Citations" are 130, which almost doubles the required minimum of 70 points.

It can be concluded that the candidate exceeds the minimum quantitative indicators for occupying the academic position of "associate professor" in the ERI-BAS, as the over performance in publications and citations is 19.6%. All publications are submitted for review, and the necessary evidence is available for citations.

3. Characteristics of scientific production

Chief Assist. Prof. Dr. Teodora Peneva participates in the competition for "associate professor" with 8 publications for the period 2019-2022: 1 monograph - № 2 (outside the habilitation thesis - № 1); 1 book published on the basis of a defended dissertation - № 3; 4 articles in scientific journals - №№ 4, 5, 6, 7; and 1 report in Proceedings of an International Scientific Conference - № 8. 7 of them are individual and one in co-authorship, and do not repeat those presented for acquiring the doctoral degree and for occupying the academic position of "chief assistant professor". All publications are peer-reviewed, and the results of the relevant research presented in the conference report are publicly approved. The candidate's research, respectively publication activity during the 4-year period makes a good impression - along with the habilitation thesis of 174 printed pages, Dr. Peneva wrote another independent monograph of 111 p., as well as published in the form of a book in volume of 250 p. results of her doctoral dissertation.

The scientific production presented by the candidate, Dr. Peneva, is entirely within the scope of the research area for which the competition was announced - *Poverty and Social Protection*. The predominant part of the publications (7 out of a total of 8) is devoted to the insufficiently developed in our economic literature problems of the definition, scope, factors, indicators, measurement methodology, assessment of **energy poverty in Bulgaria**, analysis of the consequences and trends of its development, as well as the measures and policies to reduce it and to overcome the manifestations of energy injustice. I fully accept the author's leading statement that energy poverty should be perceived as one of the barriers to the sustainable development not only of the energy sector, but also of society as a whole. This problem was studied in the most complex way in the candidate's habilitation thesis published as a monograph named "Energy poverty in Bulgaria: dimensions and factors", developed on the basis of the project of the same name within the research program of the ERI-BAS, successfully implemented and executed by Dr. Peneva. The author's achievements in the research area "Social protection" are also presented in her other individual monograph "Innovative model of **patronage care in Bulgaria**", in which, based on a survey among municipal services, an innovative model for the development of patronage care in the country was developed.

In the process of reviewing of the scientific production of candidate Dr. Peneva, no instances of plagiarism were detected.

Dr. Peneva's research work is dedicated to current socially significant problems within the scope of the competition's subject and fully meets the requirements for occupying the academic position of "associate professor".

4. Evaluation of scientific and applied scientific contributions

In the presented publications of Chief Assist. Prof. Teodora Peneva, there are results that stand out as original and represent a scientific and applied scientific contribution of the author in two main research areas - Energy poverty and Patronage care. In a synthesized form, the most important of them are the following:

• *In the field of energy poverty.*

Contributions of a theoretical-methodological nature:

- the precise **definitions** of "energy poverty" and "vulnerable consumers" missing in social practice and policy were developed (publ. № 1 and № 3);

- solutions to **key methodological issues related to measurement and assessment of energy poverty** still unclear both in the EU and in Bulgaria are proposed - which energy costs (current or normative) should be used to estimate its level; selection of income and energy expenditure thresholds; principles of determining the normative amount of energy and others (publ. № 1);

- an **own methodology** was reasoned and elaborated for determining an official line of energy poverty in Bulgaria (publ. № 1, № 7 and № 8);

- the following **models** have been developed and proposed: for quantitative assessment of the energy needs of households with the possibility of valuation at the regional level and for monitoring the energy status of the population at the national level on an annual basis (publ. № 1); for individual assessment of energy poverty (publ. № 8);

- a **system of indicators** of the cost approach was applied to measure and assess the level of energy poverty, including: the ten percent rule; poverty after energy expenditure; low income-high expenditure; low income-high share of energy expenditure; double median of energy expenditure; half median of energy expenditure; double median of share of energy expenditure; half median of share of energy expenditure, having measured and evaluated the relationships of energy poverty indicators with its main factors - income, energy expenditure, type of heating and type of household (publ. № 1 and № 3).

Contributions of an applied scientific nature:

- reasoned **recommendations for a system of measures** to reduce and deal with energy poverty have been made (publ. № 1, № 3 and № 5);

- a **measurement and evaluation of the effect on energy poverty** of the applied current system of energy efficient measures (publ. № 4) and of the administrative mechanism for the protection of energy consumers in the country as a whole (publ. № 6) was carried out.

• *In the field of patronage care, the contributions are mainly of an applied scientific nature* (publ. № 2):

- an **assessment** was made **of the current state of patronage care** and public canteens in Bulgaria and of the accessibility, effectiveness and quality of the existing "Patronage Care" social service in a home environment;

- an **innovative model for patronage care** in Bulgaria was developed, including four steps - achieving stability of the service, expansion of the scope, improvement of the price levels and expansion of the subtypes of services.

The outlined contributions in Dr. Peneva's publications have the qualities of knowledge enrichment and application of existing theory and methodology for the analysis and assessment of specific social and economic problems of high public significance. The individual contribution of the author is expressed in further development of the theoretical and methodological positions in the researched areas and mainly in relation to energy poverty, as well as in a visible practical focus of the achieved results. Of particular importance is the fact that all the contributing moments in the candidate's research activity are directly related to the

scientific expertise of the announced competition for "associate professor", as Dr. Peneva shows her skills in applying and defending the achieved results in her active expert activity.

5. Citation by other authors

In the list presented by Dr. Peneva, there are 11 citations to 6 of her publications. 4 citing sources - all of foreign authors - are in publications, referenced and indexed in world-renowned databases of scientific information, and one of them is in a journal in group Q1 in SCOPUS. This is an indicator of the supranational significance of the scientific results achieved by the candidate. 7 are the citations in monographs and peer-reviewed collective volumes, including 2 in the monographs of the authors from abroad, published by the renowned publishing house Routledge. The points collected in this group are more than the required minimum number.

6. Administrative and expert activity

During her four-year internship at the ERI-BAS, Dr. Peneva demonstrated extraordinary activity as an expert in the field of her scientific interests and achievements. In 2022, she appeared as the initiator and organizer of a round table at the Institute on the topic "Energy poverty in Bulgaria: definition and policies", which caused great public interest, by presenting to the concerned actors the results of her research on energy poverty in the country and the methodology for its determination. As a result, she was elected for deputy Chairman of the Committee on Energy Efficiency and Overcoming Energy Poverty at the Advisory Council for the European Green Deal at the Council of Ministers; invited to participate in a working group to develop changes to the Energy Act and the Ordinance for determining the conditions, procedure and criteria for determining energy-poor households as well as an expert at the Economic and Social Council of the Republic of Bulgaria in relation to energy, water and transport poverty.

7. Notes and recommendations

I have no notes on Dr. Peneva's participation in the competition for "associate professor". My recommendation to her is to expand the range of journals in publishing articles with the results of her future developments in order to achieve a higher degree of their publicity.

8. Conclusion

Everything stated in this attitude of reviewer gives me reason to believe that the only candidate Dr. Peneva meets the requirements of the Act on Development of the Academic Staff in the Republic of Bulgaria and the criteria of the Economic Research Institute at the BAS for occupying the academic position of "associate professor". I firmly **VOTE FOR awarding the academic position of "associate professor" in professional field 3.8 Economics – Poverty and Social protection at the ERI-BAS to Chief Assist. Prof. Dr. Teodora Margaritova Peneva.**

30.08.2023,
Sofia

Member of the scientific jury:
(Prof. Alla Kirova)