

## **STATEMENT**

**by Prof. Dr. Irena Zareva-Zafirova  
Economic Research Institute at BAS**

member of the Scientific Jury for the competition for the academic position of "Associate Professor" in the Field of higher education 3. Social, economic and legal sciences, Professional field 3.8. Economics - Poverty and Social Protection, announced by the Economic Research Institute at BAS (ERI-BAS) in the "State Gazette" № 44 / 19.05.2023

Regarding: the scientific, scientific-applied and professional-academic activity and production presented by Chief Assist. Prof. Dr. Teodora Margaritova Peneva, the only participant in the competition

The assessment of the candidate's scientific research activity is based on the provisions of the Law on the development of the academic staff in the Republic of Bulgaria and the requirements of ERI-BAS for the acquisition of the academic position "Associate Professor", included in the Regulations for the acquisition of scientific degrees and occupation of academic positions at the Economic Research Institute at BAS.

### **Information about the competition and the candidate**

This statement was developed in accordance with Order № 370 of 18.07.2023 of the Deputy Director of the Economic Research Institute at BAS for establishment of a Scientific Jury for a Procedure announced in SG № 44 of 19.05.2023 for the needs of the "Macroeconomics" section at ERI-BAS.

The only candidate for this competition is Chief Assist. Prof. Dr. Teodora Margaritova Peneva. Chief Assist. Prof. Dr. Teodora Peneva has a Master's degree in Management of Social Work Institutions (Sofia University "St. Kliment Ohridski"). She holds the educational and scientific degree "Doctor" from 2017 in Economics and management by industry (energy, infrastructure, public services). She successfully defended her dissertation at the Faculty of Economics of the Sofia University "St. Kliment Ohridski" on the topic "Analysis of the methods of research of energy poverty in Bulgaria", which correspond to the professional field of the current competition.

Chief Assist. Prof. Teodora Peneva held the academic positions of "Assistant" and "Chief Assistant" at the Institute of Philosophy and Sociology at BAS from 2017 to 2019, and from May 2019 she held the academic position of "Chief Assistant" in ERI-BAS. As a member of the academic staff of two Institutes at BAS, she fulfils the requirement to have at least 3 years of experience as a "Chief Assistant".

Dr. Peneva also has considerable practical experience as a market analyst in a consulting firm in China (2004-2006) and as a "Market Analysis" expert at EVN Bulgaria EOOD (2010-2014).

### **General characteristics of the presented scientific works**

The candidate submits for review 8 publications published after obtaining the academic position of "Chief Assistant" (which do not reproduce those submitted for the acquisition of the

educational and scientific degree "Doctor" and for holding the academic position of "Chief Assistant"), of which 7 single-authored:

- one habilitation thesis - a single-authored monograph, published by BAS Publishing House "Prof. Marin Drinov";
- a single-authored monographic work, published by Balkanida Publishing House;
- one published book based on a defended dissertation work for the award of the ESD "Doctor";
- two single-authored articles published in the Economic Studies journal, indexed in Scopus, with an impact rank;
- two articles and one report published in non-refereed peer-reviewed journals and in edited collective volumes, one of which is co-authored (with split protocol submitted).

The publications of Chief Assist. Prof. Teodora Peneva are in two research areas - energy poverty and patronage care, corresponding to the subject of the current competition.

Of interest is the habilitation thesis of the candidate, in which, on the basis of theoretical and empirical analysis, assessments of the level of energy poverty in the country and the relationships of various indicators of energy poverty with its main factors have been carried out. An attempt has been made to clarify unresolved (at European and national level) key methodological issues for quantifying energy poverty. Proposals have been formulated for a methodology for determining an official energy poverty line in Bulgaria, as well as for a system of measures to reduce energy poverty.

Dr. Peneva's research work is devoted to insufficiently developed current and significant issues, which is in accordance with the requirements for occupying the academic position of "Associate Professor".

The publications submitted for the competition meet the specific requirements for the editions in which they are published, provided for in the regulations of ERI-BAS. The candidate has two articles published in the Economic Studies journal, indexed in Scopus.

A total of 11 established citations of the candidate's works in international and national scientific publications are indicated. A reference to the citations, accompanied by evidentiary material, is presented.

Dr. Teodora Peneva meets the requirements for professional academic experience for holding the position of "Associate Professor", and the presented scientific works and citations exceed both the national minimum requirements for holding the academic position of "Associate Professor" and the increased thresholds of ERI-BAS by section D (258 points with required 230) and section D (130 points with required 70). The candidate scores a total of 538 points, with a minimum threshold according to the application rule of the Law on the development of the academic staff in the Republic of Bulgaria of 400 points and minimum requirements according to the Regulations of ERI-BAS – 450 points. The required two publications are also presented in indicators 6 and 8.

The presented scientific works testify to the candidate's ability to conduct scientific research at the required scientific level. Their thematic focus fully corresponds to the subject of the current competition.

## **Assessment of scientific and scientific-applied contributions**

The scientific works of Chief Assist. Prof. Teodora Peneva are entirely in the stated scientific field of the competition. The candidate's research achievements are mainly related to a systematic and multifaceted study of energy poverty and, to a lesser extent, to patronage care in Bulgaria. More specifically, the main contributions can be summarised in the following directions:

### 1. In theoretical and methodological terms:

- a model was developed for the quantitative assessment of household energy needs;
- a model for individual assessment of energy poverty was developed;
- definitions of "energy poverty" and "vulnerable consumers" are proposed;
- key methodological issues for quantifying energy poverty that have not yet been resolved in the EU and in Bulgaria have been clarified;
- a methodology was developed for determining an official energy poverty line in Bulgaria.

### 2. In scientific-applied terms:

- the level of energy poverty in the country was measured and assessed according to various indicators of the cost approach to measurement;
- the relationships of energy poverty indicators with its main factors were measured and assessed;
- main challenges to deal with energy poverty in Bulgaria have been identified;
- the effect of applying energy efficient measures on energy poverty in Bulgaria was measured and assessed;
- negative effects of the administrative mechanism for the protection of energy consumers in Bulgaria on energy poverty have been established;
- a system of measures to reduce energy poverty is proposed;
- the current state of patronage care and public canteens in Bulgaria as of 2020, as well as the accessibility, effectiveness and quality of the currently operating social service in a home environment "Patronage Care" have been established;
- an innovative model for patronage care in Bulgaria was developed.

There are no indications of unfair use of other person's scientific achievements without the corresponding reference in the candidate's publications.

For the period from 2019 to now Chief Assist. Prof. Teodora Peneva has participated with reports at seven international and national scientific forums. She took part in seven international and national research projects. Through the practically oriented projects in which the candidate participated, she transferred scientific results and expertise into practice. Dr. Peneva was Deputy Chairman of the Commission for Energy Efficiency and Energy Poverty at the European Green Deal Advisory Board at the Council of Ministers; she participated in a working group for the development of Law on Amendments and Supplements to the Law on Energy and Regulation for determining the conditions, order and criteria for determining energy-poor households; she took part in the development of a draft opinion of the Economic and Social

Council of the Republic of Bulgaria on the topic "Energy, water and transport poverty - specifics of the manifestation and measures to overcome them".

The scientific and scientific-applied activity and production of Chief Assist. Prof. Dr. Teodora Peneva have a clearly defined scientific topic, corresponding to the professional field of the current competition.

### **Critical notes and recommendations**

I have no substantive notes.

I would recommend Chief Assoc. Prof. Teodora Peneva to expand the presentation of her achieved results to the academic community and society through publications in scientific issues especially those indexed in world-renowned international databases, with an impact factor or rank.

### **Conclusion:**

The comparison of the above presented quantitative and qualitative parameters and assessments of the scientific and practical results of the professional activity of Chief Assist. Prof. Teodora Margaritova Peneva with the criteria laid down in the Law on the development of the academic staff in the Republic of Bulgaria, the Regulations for its implementation and the Regulations for the acquisition of scientific degrees and holding academic positions at the Economic Research Institute at BAS, justify my assessment that the candidate fully meets the requirements for occupying the academic position of "Associate Professor" in ERI-BAS.

This gives me the reason to propose to the respected members of the Scientific Jury the candidate in the competition Chief Assist. Prof. Dr. Teodora Margaritova Peneva to be elected to the academic position of "Associate Professor" at ERI-BAS.

Member of the Scientific Jury:

15.09.2023

Sofia

Prof. Dr. Irena Zareva-Zafirova