

PEER REVIEW

**for the needs of a competition for an academic position "Associate Professor"
in professional field 3.8 Economics**

Prepared by:

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Regulatory basis:

Order 369/18.07.2023 of the Director of the Economic Research Institute (ERI) at the BAS, Order 370/18.07.2023 of the Deputy Director of the Institute and Decision of a Scientific Jury on Designating Reviewers (protocol No. 45/25.07.2023)

About:

competition for Associate Professor in professional field 3.8 Economics - Economics of poverty and social protection, announced in SG No. 44 of 2023 , for the needs of the "Regional and Sectoral Economy" section at the ERI, BAS

One candidate participates in the competition, namely:

Chief Assistant Professor Dr. Teodora Margaritova Peneva

1. Brief presentation of the candidate and assessment of professional experience

Chief Assistant Professor Dr. Teodora Margaritova Peneva has a bachelor's degree in Chinese Studies and Chinese Language and Economics from the Peking University in China, a master's degree in International Economics from Peking University and a master's degree in Management of Social Work Institutions from the Faculty of Pedagogy at SU "St. Kliment Ohridski". In 2017, she defended a dissertation on the topic "Analysis of methods of researching energy poverty in Bulgaria" (in Professional field 3.8 Economics) at the Department of "Industrial Economics and Management " at the Faculty of Economics and Business Administration of SU "St. Kliment Ohridski". My professional acquaintance with the candidate is from the period 2013-2017, when she was a doctoral student in our

department – I was then in my capacity as a doctoral student, assistant professor and scientific secretary of the Department.

In the period 2017-2019, the candidate was an assistant professor and chief assistant professor in the "Public Policies and Social Changes" Section at the Institute of Philosophy and Sociology at the BAS, and from May 2019 she was a chief assistant professor in the "Macroeconomics" and "International economics" Sections at the Economic Research Institute at the BAS. In addition to her academic career, Dr. Teodora Peneva also has significant practical experience as an analyst of energy and other markets in organizations such as "EVN Bulgaria", "Internet Securities", etc. She is fluent in Chinese, English, French and Russian.

Undoubtedly, the candidate's theoretical training and practical experience are extremely rich and varied, and her academic work in various organizations from the public and private sectors is recognized not only nationally. In the last 10 years, she has been an active participant in a number of public processes as a member of expert groups and councils, e.g. Deputy Chairman of the Commission for Energy Efficiency and Energy Poverty of the Advisory Council for the European Green Deal of the Council of Ministers, participant in working groups for the development of sectoral legislation (Energy Act changes, and Ordinance for determining the conditions, order and criteria for determining energy poor households), to the Economic and Social Council of the Republic of Bulgaria in relation to water, energy and mobile poverty, etc.

Dr. Teodora Peneva is a recognized expert in the energy sector and in particular in the topic of energy poverty in the Republic of Bulgaria, and her publications on the topic have been cited by leading researchers internationally, in a number of prestigious scientific publications .

Chief Assist. Prof Dr. Teodora Peneva has participated in a number of international and national scientific forums and professional conferences with reports, being an active participant in the scientific discourse on the topics related to energy poverty and patronage care. She has also participated as an expert in a number of research projects implemented in partnership with scientific institutes from the country and abroad, with commercial companies and non-governmental organizations.

2. Fulfillment of the minimum requirements and the additional requirements of the ERI, BAS

The mandatory conditions that are required of the applicants according to the national legislation are:

- 1) To have acquired an educational and scientific degree "Doctor" or a scientific degree "Doctor of Sciences";
- 2) For not less than two years, they have held the academic position of "assistant professor", "chief assistant professor", or have been lecturers, including part-time, in a university or scientific organization;
- 3) To have submitted a published monographic work or equivalent publications in specialized scientific publications, which do not repeat those submitted for the acquisition of the educational and scientific degree "doctor" and for the acquisition of the scientific degree "doctor of science".

The candidate in the competition for "Associate Professor" – Chief Assistant Professor Dr. Teodora Margaritova Peneva, meets the above legal requirements. The candidate fully meets the national requirements and those of the ERI according to the group of indicators А, Б, В, Г and Д, meeting the additional requirements according to Art. 81 of the Regulations for the acquisition of scientific degrees and the occupation of academic positions at the ERI, BAS, namely the presence of "at least 2 publications in a refereed and indexed edition in SCOPUS or WoS".

3. General characteristics of the presented scientific publications and citations

To participate in the competition, the candidate submitted a monograph – habilitation thesis, in group Б: "Energy poverty in Bulgaria: dimensions and factors" –BAS Publishing House "Prof. Marin Drinov", 2022; one monograph, which is not presented as the main habilitation thesis - "Innovative model of patronage care in Bulgaria" - Balkanida Publishing House, 2021; as well as a published book based on a defended dissertation – "Measuring energy poverty in Bulgaria" - Balkanida Publishing House, 2021.

The following publications were also reported in group Г: 2 articles and reports published in scientific publications, referenced and indexed in world-famous databases with scientific information and 3 articles and reports published in non-refereed peer-reviewed journals or published in edited collective volumes, incl. one of them co-authored (the other publications are with single author – Dr. Peneva).

As can be seen from the documents provided, the publications presented under group Γ do not repeat the publications presented in the procedure for acquiring the "Doctor" degree by the applicant.

In group Δ (citations) 4 items are citations or reviews in scientific publications, referenced and indexed in world-famous databases with scientific information or in monographs and collective volumes, as well as 7 citations are in peer-reviewed monographs and collective volumes.

As can be seen from the cited publications, the candidate's research is relevant not only to national scientific discussions on the topic of "energy poverty", but also internationally. This is a trend that has been observed since the candidate's first scientific publications on this topic that I am aware of since her doctoral studies.

4. Evaluation of scientific and scientific-applied contributions

I agree with the scientific contributions presented and described by Chief Assistant Professor Dr. Teodora Peneva. I confirm the two main research areas with contributions in her publications: 1) Energy poverty and 2) Patronage care.

The majority of the candidate's scientific and applied scientific contributions are undoubtedly in the field of energy poverty. The candidate examines this topic in a number of her publications over the past 10 years and the contributions are both scientific and scientific-applied in nature, and a number of the studies have served to shape or change the policies and regulatory framework related to energy poverty in the Republic of Bulgaria.

In the habilitation thesis of the candidate (N1 from the provided list - "Energy poverty in Bulgaria: dimensions and factors"), as well as in one of the other monographs (N3 - "Measuring energy poverty in Bulgaria") and in a number of the presented articles, the scientific and the scientific-applied contributions are related to the development and offering of a model for quantitative assessment of household energy needs with the possibility of valuation at the regional level, as well as monitoring of the energy status of the population at the national level on an annual basis; proposals for possible definitions of "energy poverty" and of "vulnerable consumers" that can be used for social policy purposes; development of a methodology for determining the official line of energy poverty in the country; measurement and assessment of the level of energy poverty in the country according

to various indicators of the cost approach to measurement; development of a model for individual assessment of energy poverty; measurement and assessment of the effect of applying energy efficient measures on energy poverty in Bulgaria, etc.

More specifically, the monograph "Energy poverty in Bulgaria: dimensions and factors" is the second scientific work of Chief Assistant Prof. Dr. Teodora Peneva in the field of methods for measuring energy poverty, created in a research project of the ERI, BAS. The study is an in-depth theoretical and empirical analysis of energy poverty, with the author looking at 12 indicators included in the recommendations of the EU and the Energy Poverty Observatory in Brussels. Part of the contributions of this habilitation work are related to the clarification of key methodological issues that had not been resolved until then for the quantification of energy poverty in the Republic of Bulgaria and in the EU, with the measurement and assessment of the relationships of energy poverty indicators with basic factors such as income, costs for energy, type of heating and type of household, with proposals for a methodology for determining an official line of energy poverty in Bulgaria and for a system of measures to reduce energy poverty, based on coordination at the state level and upgrading at the individual level.

In the second area, patronage care, I confirm the reported contributions in connection with the published monograph (N2 from the list - "Innovative model of patronage care in Bulgaria").

From a practical-applied point of view, part of the contributions can also be evaluated through the lens of the current challenges facing the European and national legislation, related to the correct definition of "energy poverty" and the number of citizens affected by it, with the necessary social tools and challenges covering the parallel process of decarbonization of the economy with the will of the European Commission and the member states for a Just Energy Transition.

5. Notes and recommendations to the candidate

I have no specific remarks about the presented scientific publications and the candidate's scientific work to date. I would share practical advice for the applicant's future research work and opportunities for complementary research on the topic in an operational order and will not concern the esteemed scientific jury with this.

6 . Conclusion

My categorical opinion is that the candidate for "Associate Professor" in Professional field 3.8. Economics, Chief Assistant Professor Dr. Teodora Margaritova Peneva, meets the express legal requirements and regulations, has the necessary publications and distinguished contributions.

This allows me to express my positive opinion and to vote for Dr. Teodora Margaritova Peneva to be awarded the academic position "Associate Professor" in field 3.8 Economics - Economics of poverty and social protection.

Sofia, 18/09/2023

Signature:

/Assoc. Prof. Dr. Atanas Dimitrov Georgiev/