

REVIEW

by Dr. Yordan Atanasov Christoskov, professor at the Economic Research Institute at BAS on the materials submitted for participation in a competition for the academic position of "Associate professor" at the Economic Research Institute (ERI) at Bulgarian Academy of Sciences (BAS) in the field of higher education 3. Social, economic and legal sciences, professional direction 3.8. Economics of poverty and social protection.

1. Information about the competition

The competition has been announced for the needs of the "Macroeconomics" section of the ERI at the BAS (State Gazette, No. 44 of 19.05.2023). I participate in the composition of the scientific jury for the competition in accordance with the decision of the Scientific Council, protocol No. 7/12.07.2023 and Order No. 369/18.07.2023 of the Director of the ERI at BAS. In the announced competition for occupying the academic position of "Associate professor" only Chief assistant Teodora Margaritova Penevaq PhD, from the "International Economy" section.

2. Brief information about the candidate in the competition

General Assistant Dr. Teodora Peneva has a very good and interesting educational background. She holds 2 bachelor's degrees (in Chinese studies at Sofia University "St.St. Cl. Ohridski" and in Chinese language and economics at Peking University of Languages and Cultures), as well as 2 "master's" degree - in international economics at Peking University and in management of the institutions for social work in Sofia University "St.St. Cl. Ohridski". Her doctoral dissertation on the topic "Analysis of methods for researching energy poverty in Bulgaria" was also defended at Sofia University.

Dr. Teodora Peneva's scientific career began in March 2018 as a chief assistant in the "Public Policies and Social Changes" section of the Institute of Philosophy and Sociology at the BAS. From May 2019, she transferred to the ERI at the BAS in the "International Economy" section as a chief assistant. She participated in 4 projects from the scientific-research plan of the institute. Teodora Peneva's main research interests are in the field of general poverty, energy poverty, vulnerable groups, social services, social policy and protection.

Dr. Teodora Peneva has practical experience as an expert in market analysis and as a manager in international energy companies. In 2022, she is the vice-chairman of the national Commission on Energy Efficiency and Overcoming Energy Poverty at the Advisory Council for the European Green Deal.

It should be noted that both the educational training of Dr. Teodora Peneva, as well as her research activity at the ERI at the BAS, as well as her work on practical-applied projects outside the institute, fully correspond to the topic of the announced recruitment competition to the academic position "Associate professor".

3. Fulfillment of the quantitative and qualitative requirements for occupying the academic position "Associate professor"

The information in the presented quantitative forms shows that the application of Dr. Teodora Peneva fully meets the National minimum requirements according to the Law on the Development of the Academic Staff in the Republic of Bulgaria and the Regulations for the Application of this Law. Dr. Peneva's quantitative score of 538 points exceeds the required threshold of 450 points. Accordingly, in group D (publications) she has 258 points out of the required 230 points, in group D she has 130 points out of the required 70 points. The presented information proves that the Additional requirements of the ERI at BAS for the candidate to have at least 2 publications in scientific publications, referenced and indexed in world-renowned databases with scientific information, are also met.

4. Brief description of the presented scientific works/publications

Chief assistant Teodora Peneva, PhD, has submitted the following publications for participation in the competition for the academic position of "Associate professor": basic habilitation scientific work - monograph of 174 pages; a monograph of 111 pages, which is not presented as the main habilitation thesis; a published book with a volume of 250 standard pages based on a protected dissertation work for the award of the educational and scientific degree "doctor" (this book is not subject to evaluation); 2 studies that have been published in a scientific publication indexed in SCOPUS (Journal of "Economic Research"); two articles and one report published in non-refereed peer-reviewed journals. The two studies and one report were published in English, and the rest of the publications were in Bulgarian. Seven publications are individual, and one publication is co-authored, with the corresponding separation protocol presented.

The publications presented for review (without the book based on the dissertation work) are from the period after receiving the "doctor" degree and holding the academic position "Chief assistant". They are related to the topic of the docent competition and fully cover the scientometric requirements for it

The monographic habilitation book of the Chief assistant Teodora Peneva - Energy Poverty in Bulgaria: dimensions and factors. BAS publishing house "Prof. Marin Drinov", 2022 (publication 1 from the list) is distinguished by the following scientific merits:

- **Relevance:** the work is extremely relevant from a research and practical point of view. The almost free energy market in Bulgaria, burdened with crisis situations, makes the costs of heating and other household needs unbearable for a large part of families. From here, the issues of energy poverty and the need for energy support are not only topical, but also loaded with critical crisis potential.
- **The applied scientific toolkit and the obtained results of the analysis have a scientific-theoretical value and practical applicability** - a wide scientific toolkit was used: a study of literary sources, theoretical and empirical analysis, processing and analysis of anonymized statistical data from the study of household budgets of NSI

and others. The statistical analysis is based on all related secondary data on income, energy prices and consumption. The trends in the development of energy poverty are studied through the three approaches - objective, subjective and cost, and within the framework of the cost approach, the results of eight indicators are analyzed.

- **Clearly expressed scientific objectivity, professionalism and good faith.**

Regardless of the fact that the public space, as well as many of the scientific studies, are currently emotionally and politically overloaded with different assessments of the price of energy resources and the scope and amount of energy support in crisis conditions, the analysis in the monographic work is based only on an objective statistical information and scientific reasoning.

- **Practical utility** – a methodology for determining an official line of energy poverty in Bulgaria is proposed, as well as a system of measures to reduce energy poverty, based on coordination at the state level and upgrading at the individual level.

The habilitation monographic work of Dr. Teodora Peneva represents a synthesis of her scientific accumulations and experience in the field of poverty, energy poverty and social policy. This work is an expression and proof of her academic growth based on a purposeful scientific and expert work.

Apart from the habilitation monographic work, energy poverty is also the subject of research in the majority of Dr. Peneva's publications. They offer: working definitions of energy poverty and vulnerable groups (publication 3); energy poverty line (publications 7 and 8); level of energy poverty in the country according to different indicators of the cost approach (publication 3); the main challenges and assessments of the effect of applying energy efficient measures on energy poverty in Bulgaria (publication 3, 5 and 7); the negative effects of the administrative mechanism for the protection of energy consumers in Bulgaria on energy poverty (publication 6).

The second monographic work of Dr. Teodora Peneva "Innovative Model of Patronage Care in Bulgaria" (at number 2 on the list) has the following merits: it is a critical review of the current state of patronage care and public canteens in Bulgaria as of 2020; the accessibility, efficiency 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.

The main merits of Dr. Teodora Peneva's habilitation thesis, of the presented second monograph, as well as the strong points in the presented scientific studies, articles and report, are mainly expressed in presenting up-to-date, systematic and comprehensive knowledge in the thematic areas, object of the announced competition for the academic position of "Assistant professor".

5. Contributions (scientific, scientific-applied, applied) and citations

I fully accept the scientific and scientifically applied contributions of Chief assistant Teodora Peneva, as correctly defined and deduced from the content of her scientific works.

In summary, the scientific contributions of the candidate for the academic position "Associate professor", Dr. Teodora Peneva, can be qualified as a systematization of the existing knowledge and the disclosure of trends, connections and problems in the announced specific area of the competition - general poverty, energy poverty and policy for its reduction, patronage care. This enrichment was achieved through in-depth theoretical and empirical analysis and skillfully selected methodological approaches, which led to: a more precise definition of basic concepts; proposal for confirmation and development of some relatively new areas of economic theory and practice - models and indicators for measuring energy poverty, comparative analysis of policies, innovative model for patronage care.

6. Assessment of the candidate's personal contribution

The presented habilitation thesis, the scientific publications and the highlighted scientific and academic-applied contributions of Chief assistant Teodora Peneva are her personal achievement and the product of her scientific research in accordance with the norm of scientific ethics according to the procedure regulated in the Law on the Development of the Academic Staff in the Republic of Bulgaria, the Rules for the Application of this Law and the Rules for the Development of the Academic Staff of BAS.

The scientific work of Dr. Teodora Peneva is the subject of scientific discussion and evaluation as it has been used by other scientists working in the field of general poverty, energy poverty and patronage care. Information is presented on 11 citations of 6 of her publications, with 4 of the citations being in scientific publications, referenced and indexed in world-renowned scientific information databases or in monographs and collective volumes.

7. Critical remarks and recommendations

I have no critical remarks on the presented materials and on the candidacy of Dr. Teodora Peneva in the competition for the academic position of "Associate professor".

8. Personal impressions

I personally know Dr. Teodora Peneva from our joint work on the project of BAS Energy Strategy of Bulgaria (with an emphasis on electricity). She is an extremely hardworking, ambitious and searching young scientist with the potential for a very successful scientific career.

CONCLUSION

The documents and materials presented by the candidate Chief assistant Teodora Peneva, PhD, meet all the requirements of the Law on the Development of the Academic Staff in the Republic of Bulgaria, the Regulations for the Implementation of this Law and the relevant Regulations of the BAS. The candidate in the competition has presented a significant number (above the minimum requirements) of scientific papers. The candidate's works contain original scientific and scientific-applied contributions that have received recognition among the scientific community at home and abroad. Its theoretical and practical developments are useful for decision-makers to reduce energy poverty and the organization of

patronage care. On this basis, I give my positive assessment and recommend that the Scientific Jury prepare a report-proposal to the Scientific Council of ERI at the BAS for the selection of Teodora Margaritova Peneva in the academic position of "Assistant professor" in professional field 3.8. Economics of poverty and social protection. .

22/08/2023

Reviewer:

(Prof. Dr. Yordan Hristoskov)