

STATEMENT

By: **Assoc. Prof. Dr. Alexander Ivanov Valkov,**

University of National and World Economy - Sofia, Faculty of Management and Administration, Department of Public Administration, professional field 3.7. "Administration and Management", academic area "Organization and Management outside the sphere of material production"

Regarding: the competition for the academic position of "Associate Professor" at the VUZF (University of Insurance and Finance) in the professional field 3.7 "Administration and Management" (Public Management and Education Strategies)

Reason for submitting the review: (1) Participation in the Scientific Jury of the competition according to the Order № 371/10.11.2022 of the Rector of VUZF and (2) Decision of the Scientific Jury (11.11.2022) for the appointment of reviewers.

The statement was prepared in accordance with the requirements of the Academic Staff Development Act in the Republic of Bulgaria (ASDARB), the Regulations for its implementation and the Regulations for the Development of the Academic Staff of VUZF.

The competition for Associate Professor is announced in the State Gazette, No. 52 of 05.07.2022 and on the official website of VUZF. **The only candidate in the competition is Dr. Daniela Petrova Karaangova**, lecturer at VUZF.

1. General presentation of materials

By Order No. 371 of 10 November 2022 of the Rector of the University of Insurance and Finance, I have been appointed as a member of the Scientific Jury of the competition for the academic position of **Associate Professor at VUZF** in the field of higher education 3. "Social, Economic and Legal Sciences", professional field 3.7 "Administration and Management".

The set of materials submitted by the only candidate in the competition - **Dr. Daniela Petrova Karaangova**, on electronic media is in accordance with the Regulations for the Development of the Academic Staff of VUZF and includes 22 files. All the documents required for participation in the competition are available, accessible, logically arranged, which allows them to be used as a complete documentary basis for the evaluation of the candidate in the announced competition.

The documentation for the competition meets the requirements of ASDARB (Article 2b) and the Regulations for its implementation (Article 1a, paragraph 1) and the Regulations on the Conditions and Procedures for the Occupation of Academic Positions at the University of Insurance and Finance (Article 21).

The candidate in the competition, Dr. Daniela Petrova Karaangova, participated in the competition with 3 (three) monographs, one of which was submitted as a major habilitation thesis. All materials submitted for review (the three monographs) are within the scope of the competition and are accepted for review. They are outside the dissertation and count towards the final evaluation of the candidate in the competition.

2. Brief biographical data

Dr. Daniela Petrova Karaangova (born 14.07.1990) graduated from the 2nd secondary school "Emilian Stanev" in Sofia, language school, with a profile in English, Spanish, history and geography (2009). In 2012 she obtained a Bachelor's degree in Public Relations and Communications from the University of Southampton (Solent University), and in 2013 she defended a Master's degree in Management/Management and Marketing at Bournemouth University. During the period 2015-2019 she studied for a PhD in Management at the University of Southampton, where on 24.03.2020 she defended her PhD thesis on "The Transformation of the Higher Education Systems of the Eastern European Developing Countries Through Organisational Learning. The Case of Bulgaria" and received her PhD (diploma, 25.01.2021). The obtained doctoral degree is recognized by NACID (certificate No. 08-00-38/ 01.09.2022). She is listed in the Register of Academic Staff and Defended Dissertations as the recognized diploma is for the PhD in professional field 3.7 "Administration and Management". (<https://ras.nacid.bg/dissertation-preview/66068>).

Since the academic year 2019/2020 and up to the present moment, Dr. Daniela P. Karaangova works as a guest lecturer at VUZF. Since October 2022, she has also been working as Deputy Editor-in-Chief of *VUZF Review*, assisting the Editor-in-Chief in developing the content of the journal and working on the preparation of submissions for publication and coordinating the work of the editorial staff with reviewers and authors.

The candidate has completed a number of courses and training (mainly during his PhD studies). These have been useful in building up full teaching and research skills in areas such as: networking and management for researchers, publication skills, research skills for critical literature analysis, quantitative and qualitative analysis, skills in using research software - NVivo (for content analysis) and SPSS (for statistical methods).

The candidate's education and work experience data indicate intensive and high quality training and focused development as a young researcher with an affinity for an academe career.

3. Compliance with national requirements

It is evident from the provided reference on the scientific-metric indicators that the candidate in the competition for the academic post of Associate Professor at the VUZF **meets the minimum nation-wide requirements** and is in compliance with the Regulations for the Application of the Law on Academic Research. The aggregated data show that the candidate meets the overall minimum score of 400 points (see table for individual indicators).

Group	Indicator	Min.	Points
A	Dissertation thesis	50	50
B	Habilitation thesis (monograph)	100	100
Г.4	Published monograph (not major habilitation work)	200	200
Г.5	Published book (based on a defended dissertation)		-
Г.6	Articles and reports (refereed)		-
Г.7	Articles and reports (unrefereed)		-
Г.8	Studies (refereed)		-
Г.9	Studies (unrefereed)		-
Г.10	Chapter of a collective monograph		-
Д	Citation	50	50
	Total	400	400

4. General description of the applicant's activities

4.1. Teaching and learning activities

As a lecturer in residence at VUZF from the academic year 2019/2020, Dr. Daniela P. Karaangova teaches lectures and exercises in 6 (six) courses. The total teaching load for the period 2019-2022

is 540 teaching hours, with the workload increasing with each academic year - from 120 teaching hours in 2019/2020 to 180 hours in 2020/2021 to 240 hours in 2021/2022. She teaches courses in Organizational Behavior (120 period hours), Public Policy and the Business Environment (60 hours), Academic and Transferable Skills (120 hours), Academic Writing and Working with Information Sources (120 hours), Ethics and Crisis Management (60 hours), and Management, Culture and Communication (60 hours). All courses are in the subject area of Management and Administrative Studies, and are relevant to the candidate's advanced standing. The broad range of courses taken since the beginning of her academic career is an indicator of academic ability and is a prerequisite for rapid acquisition of teaching skills.

University teaching also involves other activities such as advising students, assisting in the preparation of coursework and thesis projects, and reviewing coursework, which are mentioned by the candidate in her CV, but no more specific details are given. The two courses in Academic and Transferable Skills and Academic Writing support the candidate's work in her position as Deputy Editor-in-Chief of the academic publication VUZF Review. It can be summarized that Dr. Karaangova fulfills the requirements in terms of teaching and learning and her candidacy is in compliance with Article 24, Par. 1(2)(b) of the ASDARB.

4.2. Scientific and applied activities

4.2.1 Habilitation thesis evaluation

The monograph "*The personality and organizational constructs of systems thinking*" is presented as a major habilitation thesis, with which its author Dr. Daniela Karaangova applied for the competition for associate professor. The monograph has a total length of 121 pages, contains six chapters and includes 200 references. By its content it can be defined as an original scientific work of high theoretical and methodological significance.

The research is motivated by the central question (stated in the monograph's motto) of whether systems thinking is a mindset that people are born with, or whether it is dependent and can be influenced by factors in the external environment. This is a significant scientific challenge as systems thinking, is a powerful tool for understanding systems and dealing with complexity. Regardless of the way it is perceived and defined, systems thinking is a transdisciplinary research field and research strategy applicable across the sciences. Systems thinking is a holistic analytical approach that focuses on how the component parts of a system are connected, how systems function over time, and in the context of larger systems. The interest in the topic and in this research is also pragmatic, due to the escalating complexity, dynamics and uncertainty in our times. More than ever, leaders and managers are needed who understand complexity, can glimpse the whole and the interconnections between the parts. Because systems thinking positively impacts the effectiveness of organizations, increasing their ability to deal with problems, with high levels of uncertainty, and add competitive advantage. Therefore, the specific context of this research (as opposed to others on this topic) is the field of management.

Against the background of this basic question, the study unfolds in two directions that define its originality. **First**, if systems thinking helps, how do its vehicles - managers in business, the public sector and NGOs - influence the capacity for systems thinking in organisational and managerial terms. This defines the first perspective of the study and, as the author shows, it can be defined as a 'gap' in research on the topic. The solution is to investigate the influence of personality dimensions on systems thinking. The aim is to clarify the direction and strength of the influence of individual elements of the personality profile on systems thinking. But everything that people do in organizations is part of the pervasive context of organizational culture. This defines the **second** major direction of scholarship. It is assumed to influence systems thinking. The aim is to investigate the direction and strength of the influence of different types of organizational culture on the capacity for systems thinking of people in organizations. Putting the two lines of research together outline (as the author intended) the major

outcome of the research - the development of a theoretical model (new theory) on the topic - personal and organizational constructs of systems thinking. It can be summarized, and as a result obtained, that the research proposes a new theory of the factors influencing the capacity for systems thinking in organizational and managerial contexts. This is the main scientific contribution of the development, and thus it also draws new research opportunities in theoretical and applied research.

The skeleton of the study involves three successive stages. The **first stage** is a critical review of the relevant and more recent academic literature. The review highlights personality factors as the missing link in systems and systems thinking research. The research outcome of this stage is the identification and substantiation of personality profile factors and a typology of organizational culture conducive to systems thinking. The author justifies the choice of Norman and Goldberg's five-factor model of personality (FFMP) and Poors' four types of organizational culture: the first, as a universal "template" for understanding the personality structure of individuals and the second, as relevant to the task of studying systems thinking. This allows to formulate the research hypotheses. The first five refer to each of the broad objects of the FFMP: neuroticism (-), extraversion (+), openness (+), conscientiousness (-) and agreeableness (+), which are assumed to have some influence on the capacity for systems thinking. The sixth hypothesis suggests a positive influence of organizational culture. The **second stage**, describes the research methodology and substantiates the quantitative and qualitative methods used. The documentary basis of the study is 353 questionnaires from managers in 19 industries in Bulgaria and the UK. In the **third stage**, the data are processed, analysed and the results reported. As there are no prior studies that investigate the relationship between systems thinking and FFMP in a management context, *this research can be described as pioneering, the test results and the generalizations made have the character of scientific contributions*. The accuracy of the results is guaranteed by the correct use of two multiple regression models.

The results show that only two of the five personality dimensions influence individuals' ability to think systemically in a managerial context. Moderate and high levels of openness (which is associated with leadership, open-mindedness, persuasiveness, ability to reflect, willingness to learn from mistakes, and innovation) positively influence. Moderate and high levels of conscientiousness have a negative impact on systems thinking (this is associated with behaviours such as strong will, purpose and persistence, achievement, ambition, hard-working, responsibility, prudence, organisation). Contrary to expectations, no relationship was found for the other three personality dimensions. There is a significant relationship between organizational culture and systems thinking, as it depends on its type. Systems thinking is likely to emerge in cultures such as "The Clan" (change and growth oriented) and "Open Systems" (innovation and entrepreneurship oriented).

4.2.2. Evaluation of contributions to other publications

The candidate participates in the competition with two other monographic works, beyond the habilitation thesis. The two monographs reviewed here explore topics that are entirely within the scope of the competition. In a broader context, like the main habilitation thesis, the two monographs are the result of systematic and sustained research and cognitive accumulation over the years. With her publications, Dr. Daniela Karaangova presents herself to the national and international academic community along two main and strictly followed research lines: systems thinking in management and public (strategic) management of higher education. These two themes outline the candidate's current research profile.

The first monograph is "*The Role of Higher Education in the Transformation of the Bulgarian Economy*". This study is a significant contribution to the public and scientific debate on the role of higher education in achieving a key national goal - building a smart economy based on science and knowledge. It provides a critical and well-reasoned response to a number of important questions: why this goal is unrealistic in the 2030 horizon for Bulgaria; what are the barriers limiting the role of science and higher education for the development of entrepreneurship and hence for a sustainable transformation towards smart economic growth; what is the current context for the development of

start-ups and entrepreneurship as a source for smart growth and the challenges for higher education and science; how to transform and enhance the role of higher education and science in achieving smart economic growth; etc.

The overall picture can be described as follows: the functioning of Bulgarian universities in the conditions of digitalization, global competition and marketization place them in the complex and impossible role of a "buffer" between three parties: (1) the constraints (financial, administrative and bureaucratic) imposed by the state, (2) the inequalities and deficits resulting from and stimulated by partial and ineffective policies in this area, and (3) the high demands of the labor market in a modern economic environment.

The main highlights of the study, from which the original contributions of the research in theoretical and scientific-applied terms are derived, are the following related problem areas: (1) the current conditions and challenges of the Bulgarian entrepreneurship ecosystem and the start-up sector as generators of the smart economy are studied; (2) the mechanism of influence that transforms national education policies in support of building a modern competitive economy - based on human capital education (capabilities) and values is clarified; (3) the role of higher education for the development of smart economy and lifelong learning and on this basis the tools of the state in the long-term and consistent (holistic) management of these processes (through strategies, policies, etc.) are critically reflected; (4) in the general context of the processes of internationalisation of higher education and of European policies in this field, risks to the national higher education system have been identified, which requires the removal of the artificial selective approach (public or private) in stimulating science and innovation in higher education institutions and research centres; (5) A holistic approach design has been developed that redefines the role of the state in the process of transformation towards a smart economy and considers higher education institutions and research centres as a key part of an overall national long-term policy framework, the basis for managerial (financial, organisational) and legislative measures.

Of scientific-applied value are the problems and their solutions identified on the basis of a critical analysis of strategies for the development of higher education: (1) the aspects of reforming higher education; (2) the assessment of imbalances in financial policy - critically low levels of funding for higher education and science in comparative terms and motivational gaps; (3) the transition from a policy protecting supply ("protected majors") to a policy of stimulating demand ("protected professions").

The ideas developed in this monograph are original and entirely the result of in-depth work by the author. The proposed solutions are correlated with other, similar, conceptual models, such as the "entrepreneurial/innovative university", which are characterized by *more adaptive* organizational structures, *risk-taking* in the adoption of new educational products and practices, and a constant search for *innovation* as a path to more favorable *competitive* positions. Success will be measured by the creation - within the field of traditional academic values - of new adaptive structures working in a competitive environment, aimed at improving the quality of work and the university reputation. The two solutions are subordinated to a common goal - to prepare people for the economy with competences for the future.

The second monograph, "*Perspectives for Reforming Higher Education in Bulgaria*", focuses on another central issue for the reform and development of higher education - the topical issue of profiling universities as research and educational institutions. It comes as a response to dominant processes such as globalization and internationalization of higher education and to the need to follow and apply working foreign models for organizing and stimulating education and science. To this topic, in relation to the current situation in the country, another interesting dimension can be added for our national system of higher education - the dilemma of "multidisciplinary and/or specialized higher education institutions", which here goes beyond the specific subject of the study.

The specific empirical study is grounded in the application of an inductive approach through qualitative research instruments: 46 in-depth interviews (42 individual, 3 paired and 1 focus group) of 53 participants (at different levels) from the higher education system in Bulgaria. It is based on a study of global trends in this field. This outlines more clearly the need and the real opportunities for profiling (research - education) in the specific Bulgarian context. The consequences of this are manifested at different levels - national, organizational and individual, require decisions and changes in all aspects of higher education management - legislative, institutional, financial, human resources, require rethinking the systemic and contextual factors that determine the success and adaptation of foreign models. The practical question posed by the author is related to the applicability of this model and the search for an alternative way of its implementation in the concrete Bulgarian conditions.

The scientific contributions are achieved on the basis of a broad review of relevant and up-to-date scientific literature and a specific empirical study. They can be summarized as follows:

In theoretical terms: (1) the need to apply a holistic approach to profiling higher education institutions is justified, linking in a unified and manageable mechanism the behaviour and response of both sides to change: at the individual level and at the system level; (2) the research profile of universities and research activity is shown to be a selective factor (through higher funding) for inequality between universities nationally and globally, while the massification of higher education in a differentiated labour market stimulates the education function; (3) the specific challenges faced by developing countries in profiling universities are summarized and the role of the state in supporting this process is argued; (4) alternative reformist approaches to university profiling are summarized and resistance factors (at the individual and system levels) are outlined.

The following results are of scientific and applied significance: (1) Identification of opportunities and difficulties in the profiling process at the individual and system level. At the first level, low individual readiness, acceptance and motivation of profiling is reported. At the second level, there is low state engagement in the reform process, with a lack of communication of reforms, coupled with extremely low credibility of system actors, both in profiling and in reforming higher education "in general"; (2) an established short-term orientation and fragmented approach to change, a lack of real strategy which reduces commitment, a predominantly centralized approach to implementing change which erodes the likelihood of success, despite the almost unanimous perception that a centralized approach is problematic when implementing profiling.

Higher education profiling reform is seen as an organisational change that requires a holistic approach to its management, solid long-term planning and significant resources. The general conclusion is justified that the direct application of foreign models without taking into account national specificities, in the absence of a long-term strategy for the development of higher education and science and with a dominant centralized model of governance, low levels of sharing and partnership with stakeholders leads to failure.

4.2.3. Citation

The reference for the scientific metrics indicates 3 (three) publications of the candidate for which citations have been identified. The total number of citations is 6 (six): one citation of a monograph reviewed here, two citations of a scientific paper and three citations of a book chapter involving the candidate. The majority of citations (four) were in this year, an indicator of growing interest. Four of the citations are in Bulgarian and two are in English (*Sustainability; Journal of Entrepreneurship, Business and Economics*). There are no citations listed in refereed publications or other databases. The applicant fulfils the requirements.

4.2.4. General evaluation research activity

In continuation of the above, I note the following about the papers reviewed here:

The developed methodological framework for organizational/institutional change presented in the main habilitation thesis ("holistic approach") is a scientifically significant achievement, applicable and validated in the specific areas studied by the candidate in the competition - the system of higher education and science.

The topicality of the publications is undoubted and their scientific significance - in theoretical and applied terms is proven by the presented scientific innovations and concrete results. The reviewed monographs, apart from the main habilitation work, have the character of pioneering for the country. They address real societal problems on which there is (acute) public debate. The search for solutions on topics of importance for society on the basis of grounded (objective) research, persuasive argumentation and critical reflection on the investigated data obtained in a systematic framework ("thinking in a system") is the main merit of the academic researcher.

The contributions mentioned in the reviewed texts are the personal work and achievement of the candidate. I have no doubts about the authorship. No evidence or signals of copyright infringement have been found. The handling of sources and data is correct and according to academic standards.

5. Comments, recommendations and critical remarks

The revised texts are of a high scientific standard. They are evidence of developed skills for theoretical generalizations, reasoning and methodological correctness, and insightful and well-reasoned empirical analysis. The results are of interest to a wide range of users: researchers, teachers, students and practitioners.

Recommendations regarding future activities as a teacher and researcher:

- to expand publication activity in scientific journals refereed and/or indexed in international databases;
- publish academic literature on the subjects she teaches.

6. Personal impressions

In 2017, in connection with conducting my dissertation research, I was interviewed by University of Southampton PhD student Daniela P. Baryakova on the topic of "Innovation in Higher Education". The interview was part of a PhD research on social innovation in higher education in an Eastern European context, and in particular for Bulgaria. Outside of this interview and the information received about how to use it, I have no other impressions of the candidate. My impression from the interview is of a colleague with a sincere and deep interest and knowledge in the topic of higher education, which is now confirmed by my familiarity with the publications as well.

7. Conclusion

The documents and materials submitted by Dr. Daniela Petrova Karaangova meet the requirements of the Academic Staff Development Act in the Republic of Bulgaria, the Regulations for its Implementation and the Regulations for the Conditions and Procedures for Holding Academic Positions at VUZF.

The applicant has submitted a sufficient number of scientific publications. They contain the original theoretical, methodological and applied contributions mentioned in this statement, presenting convincingly the candidate's capabilities as a researcher seeking solutions to issues of importance for science and practice.

The candidate in the competition meets all the minimum national requirements for Associate Professor at the VUZF. The scientific and teaching qualifications of Dr. Daniela Karaangova are unquestionable.

After getting acquainted with the materials and scientific works presented in the competition, analysis of their significance and scientific, scientific and applied contributions contained in them, I find it justified to give my **positive assessment and to recommend** the Scientific Jury to prepare a report-proposal to the Academic Council **for the election of Dr. Daniela Petrova Karaangova to the academic position of 'Associate Professor' at VUZF in the professional field 3.7 Administration and Management (Public Management and Educational Strategies).**

November 29, 2022

Signature _____

Assoc. Prof. Dr. Alexander Valkov