

EVALUATION REVIEW

by **assoc. prof. Dr. Shteryo Stefanov Nozharov,**

scientific secretary of Department of „Economics “-UNWE, assoc. prof. in professional field 3.8. „Economics“, scientific specialty „Political economy (*microeconomics, macroeconomics, economic policy and sustainable development*) at UNWE, Doctor in professional field 3.8. „Economics“, scientific specialty „Political economy“- UNWE

of PhD thesis for awarding the scientific degree “Doctor of science” in higher education area 3. Social, economic and law sciences, professional field 3.8 Economics

Author: *Alina Walenia*

Title of the thesis: “Competitiveness of EU member-states in the light of EUROPE 2020 strategy implementation”

1. General characteristics of the materials presented.

In accordance with Order № 106/1.03.2023 of the Rector of VUZF – prof. Boris Velchev, DSc. I have been selected as a member of the Scientific Jury in a procedure for awarding scientific degree “Doctor of science” to a thesis, titled: “ Competitiveness of EU member-states in the light of EUROPE 2020 strategy implementation ” in higher education field 3. Social, economic and law sciences, Professional field 3.8. Economics. Author of the thesis is: Alina Walenia

The materials, submitted by Alina Walenia include the following documents:

A copy of the thesis, abstract of the thesis, a completed card for fulfillment of the minimum requirements for scientific degree “Doctor of Science”, list of contributions of the thesis, list of publications, list of abstracts of the publications, related to the title of the thesis, CV, a copy of a diploma for awarded education and scientific degree “Doctor”, presentation.

The PhD candidate has attached: one (1) monograph, which is not presented as main thesis, two (2) articles and papers, published in scientific journals, refereed and indexed in world famous databases with scientific information, one hundred and one (101) articles and papers, published in non-refereed peer-reviewed journals in edited collective volumes, zero (0) studies, published in scientific journals, refereed and indexed in world famous databases with scientific information, zero (0) studies, published in non-refereed peer-reviewed journals in edited collective volumes, eight (8) published chapters of collective monographs and list of citations.

2. Brief biographical reference of the candidate

The PhD candidate Alina Walenia obtained master's degree in economics in 1985 at University of Agriculture in Krakow – Poland. In 1998 she obtained educational and scientific degree “Doctor” in agricultural sciences at University of Agriculture in Lublin – Poland. In 2008 Alina obtained educational and scientific degree in economics at Warsaw School of Economics – Poland. Since 1986 she has worked as a senior expert in state control at Supreme Audit Office of Poland, Rzeszow region, since 2004 she has worked as an assistant professor at department of economic policy, College in social sciences, University of Rzeszow – Poland. She has multiple specializations, and she has participated in scientific projects.

3. General characteristics and evaluation of the PhD candidate thesis

The PhD candidate thesis covers a total of 292 pages. It is structured in table of content, introduction, five chapters, conclusion, list of key words, list of figures and tables and reference list. It includes theoretical and empirical part. The theoretical section introduces the views for competitiveness of economy in accordance with the economic theories, factors, forming the international competitiveness and indicators, determining the process. The empirical part, based on data from the EUROSTAT database and other international financial institutions for the period 2010-2020, presents evaluation of the degree of fulfillment of the main goals of Europe 2020 Strategy and its impact on the competitive positions of EU member-states, as well as EU as a whole, in international aspect. The competitive position of EU member-states and its change in the period 2010-2020 are subject to comparative analysis through a group of economic and social indicators from international databases. The comparative analysis of the indicators, determining the implementation of Europe 2020 strategy in the EU member-states for the period 2010-2020 is done through a multidimensional statistical comparative analysis of Helvig. The results of the research are presented by 55 figures, 39 tables and the reference list cover 172 resources.

4. Contributions and significance of the PhD candidate thesis for the development of science and practice

The purpose of the study is to present the theoretical aspects of the competitiveness of the economy according to economic theories, the factors that shape international competitiveness and to indicate the measures that determine this process. Based on data from the EUROSTAT database and other international financial institutions for the period 2010-2020, presents evaluation of the degree of fulfillment of the main goals of Europe 2020 Strategy and its impact on the competitive positions of EU member-states, as well as EU as a whole, in international aspect.

Main results, achieved in the thesis of the PhD candidate:

(1) development of a synthetic indicator that determines the degree of implementation of the Europe 2020 Strategy using statistical methods, which is determined on the basis of detailed indicators analysis (published by the European Commission) for monitoring the implementation of the Strategy's preconditions,

(2) determining the competitive position of EU in international aspect in relation to the fulfillment of the preconditions of Europe 2020 Strategy for 2010-2020,

(3) presentation of the impact of the Europe 2020 strategy on the functioning of cohesion policy in the EU in relation to the multiannual financial program for 2014-2020 as well as in the current financial perspective 2021-2027,

(4) carrying out a comparative evaluation of the degree of fulfillment of the adopted indicators of Europe 2020 Strategy in separate countries and in EU, as well as identification of the indicators of Europe 2020 Strategy, which are not fulfilled in the relevant member-states and stating the reasons.

(5) assessment of the extent to which the funds from the EU budget intended for cohesion policies are used to support the achievement of the objectives of the Europe 2020 strategy,

There could be outlined some **additional results**, which deserve attention:

(A) summarizing a large part of the existing theoretical concepts of competitiveness together with the factors that shape it, as well as presentation and assessment of the common policy of competitiveness implemented in the European Union;;

(B) presentation of the main provisions of the EU cohesion policy, as well as of the instruments and programs in the financial perspective 2014-2020, also the factors supporting the process of its modernization after 2020. Characterization of the principles and financial instruments of the cohesion policy of the EU in the financial perspective 2014-2020 and in the program period after 2020, defining the prerequisites for the development strategy of the European Union "Europe 2020" for 2010-2020 and the related threats and problems,

(C) determining the competitiveness of EU member states in relation to other countries in the world, based on regional competitiveness indices published by the European Commission and other ratings developed by international financial institutions,

(D) ranking of EU member states in four groups, taking into account the changes in their development in 2010-2020 (group 1 - high: stable Sweden, Netherlands, Denmark, group 2 -

medium high: stable Czech Republic, Lithuania, Poland, Ireland, Austria, group 3 - medium low: stable Slovakia, Bulgaria, Croatia, Germany, France, Portugal, group 4 - low: stable Cyprus, Spain, Italy).

The results of the research, presented in the thesis, are useful for planning the socio-economic development of individual EU member states, as well as of the EU as an organization in the international aspect.

These issues require further research, especially in the field of optimizing the programming and financing process of the EU cohesion policy, identifying the factors that limit the process of equalizing imbalances between regions, EU member states and increasing of the EU's competitiveness in the international arena.

5. Evaluation of the publications in relation to the topic of the PhD thesis candidate

The PhD candidate has attached: one (1) monograph, which is not presented as main thesis, two (2) articles and papers, published in scientific journals, refereed, and indexed in world famous databases with scientific information, one hundred and one (101) articles and papers, published in non-refereed peer-reviewed journals in edited collective volumes, eight (8) published chapters of collective monographs and list of citations.

Twenty (20) of these publications are directly linked with the scope of the thesis. They are published in scientific sources, issued in various countries, which is positive. Most of them are published in Bulgaria and Poland. There are two (2) reviewed monographs. The rest are publications and conference papers, which are indexed in various scientific indices. It also makes a good impression that most of the publications are self-published by the candidate.

6. Evaluation of the fulfillment of the minimum national requirements

I concern that the candidate meets the minimum national requirements according to the documents submitted and in accordance with the regulations of VUZF.

It is made an inquiry about the candidate's fulfillment of the minimum national requirements for obtaining the scientific degree "Doctor of Science" in the professional field 3.8. Economy

7. Abstract of the PhD candidate thesis

The content and quality of the abstract is good. It is written in accordance with the relevant regulations and presents the main results, achieved in the thesis.

8. Critical remarks and recommendations

There could be made some critical remarks and recommendations to the research:

1. In the introduction, the research object should not be formulated as a statistical indicator or a position in a rating scale;
2. In the first and second sections of the research, it is necessary to be paid attention not only to the review of the existing literature for competitiveness, but also to the studies of authors who has already studied the relationship between fulfillment of the Europe 2020 strategy and competitiveness. This fact would better outline the contributions of the present thesis.
3. In the context of global hyper competitiveness, not enough attention has been paid to the impact of transnational companies on competitiveness of EU member-states in the third, fourth and fifth section of the research.

However, the conducted research in a great extent has achieved the goals that have been set in its introduction section.

CONCUSION

The PhD candidate's thesis **contains scientifically-applied results, which are original scientific contribution** and **they cover** the requirements of the Act on development of the academic staff of Republic of Bulgaria and the regulations for its implementation. The presented materials and conclusions in the thesis **correspond** to the specific requirements of the Regulation for admission and training of PhD students at VUZF.

The PhD candidate's thesis shows that Alina Walenia **possesses** in-depth theoretical knowledge and professional skills in professional field 3.8 Economics, as **she demonstrates** qualities and skills to independently conduct scientific research.

Having in mind the abovementioned, I convincingly give a **positive assessment** of the conducted research, presented by the above-reviewed thesis, abstract, list of contributions and I **suggest**

to the esteemed Scientific Jury to award scientific degree „Doctor of Science“ to Alina Walenia in higher education area 3. Social, economic and law sciences, professional field 3.8 Economics.

13.4.2023

Reviewer:

Assoc. prof. Dr. Shteryo Nozharov