

## **REVIEW**

**by Professor Emilia Evgenieva Chengelova, DSc,  
regarding the materials submitted for the competition for the academic position of  
Associate Professor in Sociology in the specialty of Sociology, Professional Field 3.1.  
Sociology, Anthropology and Culture Sciences, for the needs of the Center for Empirical  
Social Research at the Institute of Philosophy and Sociology, BAS.**

### **1. Information on the competition**

The competition has been announced for the needs of the Center for Empirical Social Research at the Institute of Philosophy and Sociology, BAS. Information about the competition was publicized in State Gazette, issue 63/30.07.2021.

I am a member of the Scientific Jury for the competition by Order of the Director of IPS – BAS, № ПД 09-391/28.09.2021.

### **2. Information about the candidates for the competition**

Documents for the competition for Associate Professor in Sociology were submitted by Senior Assistant Professor Petya Ivanova Ilieva-Trichkova, PhD, who is the only candidate for these proceedings.

The autobiographical information about Dr. P. Ilieva-Trichkova indicates her focused professional development, marked by a distinct dynamism and many achieved positive results that have been acknowledged and awarded by the scientific community. She was born in 1984. In 2008, she completed her education in the UNWE, Faculty of General Economics, where she received a Master's degree in sociology. Her subsequent two specializations – at the Education Institute, London (2011) and at the Internationale de l'Education, Brussels (2012) – clearly indicate she intended even then to pursue research work in the field of education. In the following years, the candidate acquired theoretical knowledge and practical skills while consistently pursuing her long-term research plans. She began work in what was then the Institute for the Study of Societies and Knowledge – BAS, where she worked in the methodological department and had the chance to accumulate ample experience in empirical research, including participation in the preparation of complex empirical social surveys. Her professional interests led her to Adam Mickiewicz University, where she prepared a dissertation entitled “In Search of Social Justice: Current Developments in Higher Education and the Labour Market in Bulgaria”. In 2016, Dr. P. Ilieva-Trichkova defended this dissertation and was awarded a PhD degree.

Upon returning from Poland, Dr. P. Ilieva-Trichkova continued her professional career at the Institute of Philosophy and Sociology - BAS, and more precisely at the Center for Empirical Social Research, where, from 2017 until now, she has held the position of senior assistant professor. She is an active young scholar who has assiduously taken part in various scientific research projects conducted by the Institute of Philosophy and Sociology. One of her continuous research interests is lifelong learning; she has been a member of the national Coordination Group on Lifelong Learning since 2015 and continues to be active in it. Over a period of 10 years, she participated in 16 important research projects, and this has given her an excellent opportunity to expand her personal research potential and gradually grow as a researcher. It should be stressed that this type of projects are an excellent school for young scholars, who can thereby build the preconditions for expanding their knowledge of theoretical conceptions and for professional growth at a purely pragmatic level. Her latest important participation is in the project **Dynamics of Inequalities in Higher education and Adult Education: Comparative Analysis of Social Justice – JustEdu" (2020–2024)**, funded by the Vihren National Science Program of the National Science Fund and headed by Prof. Pepka Boyadjieva, DSc.

A testimony to the high quality of her scientific research work are the three awards she has received thus far: 1) the Award for Head of the Most Successful Project, funded under the Program for Support for Young Scientists and Doctoral Students in BAS – 2017; 2) the Award for Best Publication by a Young Sociologist 2010-2017 of the BSA; and 3) the Prof. Marin Drinov Young Scientist Award for 2017.

Dr. P. Ilieva-Trichkova is very well integrated in the international and Bulgarian scientific community, as demonstrated by her membership in four professional organizations: the Human Development and Capability Association (since 2011 until now), the International Sociological Association (since 2015 until now), the Marie Curie Alumni Association (since 2014 until now) and the Bulgarian Sociological Association (since 2015 until now).

### **3. Fulfillment of the minimal national requirements for holding the academic position**

An examination of the match between the minimal national requirements for holding the academic position of Associate Professor at the Institute of Philosophy and Sociology – BAS and the personal scientific achievements of the candidate shows that, whereas the minimal requirement is 430 points, Dr. P. Ilieva-Trichkova has achieved a score of 832.5 points respectively for indicators A, B, C, D and E on the scientometric table. This is a very high personal result that demonstrates exceptionally intense and visible scientific activity, materialized in production that has received high recognition by the sociological community.

It is noteworthy, for instance, that, whereas the minimal points for the indicator **E. Citations** is 60, the candidate has a score of 380 points there.

The general conclusion is that the **candidate for the current competition fully meets and even exceeds many times over the requirements for holding the academic position of Associate Professor at the Institute of Philosophy and Sociology – BAS.**

#### **4. General description of the materials submitted for the competition**

The candidate P. Ilieva-Trichkova is competing on the basis of a **total of 17 publications**, 5 of which are independent and 12 in co-authorship. The publications are presented in accordance with the requirements of the Statutes of the Institute of Philosophy and Sociology – BAS; they include:

- The monograph **Adult Education as Empowerment: Re-imagining Lifelong Learning through the Capability Approach, Recognition Theory and Common Goods Perspective**, 2021 (written in co-authorship; a division protocol B for the candidate's part has been submitted). The monograph is in English and fully meets the requirements of a habilitation work;
- Ten studies published in scientific editions that are peer-reviewed and indexed in world-renowned databases for scientific information. Nine of these studies are in English;
- Six studies published in non-peer-reviewed journals with scientific reviewing or in compiled collective volumes. Five of these are in Bulgarian, as the texts were prepared for Bulgarian scientific editions.

The monograph and eleven of the studies are written in co-authorship; for each of these publications, the candidate has submitted a division protocol that clearly distinguishes her part of authorship. In all, the 17 publications submitted by the candidate are more than enough to legitimate her participation in the competition for the academic position of Associate Professor at the Institute of Philosophy and Sociology – BAS.

#### **5. General characterization of the candidate's scientific and applied-scientific activity**

In the 17 publications submitted for the present competition, we can distinguish three subject areas in which the candidate has conducted research and has developed as a researcher.

**The first distinct and most emphasized area of research refers to lifelong learning and adult education.** The directions of research in this field are convincingly presented in the monograph **Adult Education as Empowerment: Re-imagining Lifelong Learning through the Capability Approach, Recognition Theory and Common Goods Perspective**, written in co-authorship. The division protocol for the monograph indicates that the candidate is the author of the following parts: **Chapter 3** “Heuristic potential of the capability approach and possibilities for realization in the study of (adult) education”, **Chapter 4** “Adult education as an activity and empowerment process”, and **Chapter 5** “Social embeddedness of capacities and possibilities for participation in adult education”. The candidate is also the author of parts of **Chapter 3** “Continuous striving for recognition: Adult education in the perspective of recognition”, **Chapter 8** “Justice for whom, what and where: The multi-dimensional nature of social justice in adult education”, and **Chapter 9** “Fragile sociality: Inequalities in access to adult education and social trust”.

Even the titles of the chapters indicate creative thinking and innovativeness, as well as the search for original expression and new methodological approaches.

The topic of lifelong learning and adult education is also developed in seven of the author’s studies. There is an impressive wealth of proposed ideas and argued views. For instance, informal education and the social functions it performs are analyzed, with a special emphasis on the factors that determine participation in this kind of education. In some of her publications, the candidate develops and defends the concept of social justice in adult education, highlighting several of its key characteristics: 1) inclusion in adult education; 2) the equitable position of different social groups in adult education; 3) the potential of adult education for overcoming inequalities and for full realization in work and life. The theses regarding the subjective experience of labor insecurity in the transition from education to employment sound topical and penetrating. The candidate has first-hand observations on the problems as she had taken an active part in a research project on the topic.

Taking a general view of the monograph and the studies, we see applied a consistent, systematic approach to this type of research, as well as the search for new horizons in this area. One is impressed to see that each subsequent publication shows greater depth, the author’s analysis and findings acquiring increasingly evident completeness and comprehensiveness. A very strong point in the work of Dr. P. Ilieva-Trichkova is her skill in analyzing and critically grasping the existing theoretical approaches, while preserving her independence and impartiality as an author. Another distinctive feature is her unquestionable skill in building upon past achievements and reaching conceptualizations and theoretical

models of her own. The problem of lifelong learning, especially adult education but also education of young people, is brought to a level of rational abstract understanding that encompasses the multiplicity of previous theoretical studies and enables constructing innovative theoretical models and empirical indicators for application in practical research on the topic.

Undoubtedly, the creative peak of the candidate's research on lifelong learning and adult education is her monograph on the topic. Here, Dr. P. Ilieva-Trichkova has revealed her wide potential as an excellently trained researcher. She analyzes and conceptualizes with ease, compares theoretical perspectives, discovering their advantages and shortcomings. An excellent example in this respect is her critical examination and creative development of the capability approach and the possibilities that adult education offers for professional realization. Leaning on well-known theses about this approach, the candidate has detected its heuristic potential, which she reveals systematically through a rich array of scientific means. Viewed as a process of empowerment, the capability approach and the potential of adult education for realization are given new instrumental and social dimensions.

**A second group of the candidate's publications are related to a relatively independent problem field: these are the studies on educational inequalities.** Falling under this group are seven of her published studies, in which the candidate convincingly displays her skill in in-depth sociological analysis. Her analyses on gender-based differences in education and the resulting possibilities for labor realization are highly valuable with regard to management of the processes in question. Also impressive are the analyses on the correlation between educational inequalities and the possibilities for human resources development. All this gives great social value to the candidate's researches, demonstrating her ability not only to identify significant social-economic problems but likewise to propose scientifically justified, heuristic and, also, feasible conceptual and methodological solutions. This is certainly a rare quality for any researcher and deserves encouragement and recognition.

**Two of the candidate's publications are devoted to donation to education.** This is another provocative aspect of the problem of education and the awareness of the function of education in modern societies. The studies in question are a very good example of sociological analysis of empirical data from a national representative survey of donation in Bulgaria. A strong point in the analysis is that the data have been processed using modern statistical-mathematical methods, such as the grouping method and logistic regressions. Based on the data analysis, the author has reached interesting and significant conclusions regarding

donation viewed as an activity for the benefit of others. The author points attention to the fact that raising the level of trust is of essential importance for developing the culture of giving to education in Bulgaria. One of the publications points out that enlarging the variety of sources of funding education is one of the ways to meet the need for democratization of access to quality education.

## **6. Assessment of the candidate's scientific and applied-scientific contributions**

The publications submitted for the competition show a clear focus on several areas of research, very rich content, and multifunctional analyses based on critically understood theoretical perspectives as well as on supplied empirical data. I will highlight the following scientific and applied-scientific contributions of the candidate:

### **A. Scientific contributions:**

- **The capability approach and the possibilities of realization through adult education** have been analyzed and conceptualized, the critiques of this approach have been systematized and its instrumental advantages over human capital theory have been indicated. The contribution here is that the capability and possibility approach is shown to overcome the limitations of the human capital theory in distinguishing three functions of education: the **instrumental, the inherent and the empowering/transformational**;
- Essentially new conceptions have been elaborated in models of activity and models of (dis)empowerment through adult education. The models in question have a high heuristic and research value: the activity models describe the modes of interaction/communication with others, and the empowerment models in and through (adult) education reveal the potential for enhancing processual freedom and control over the environment in which people live;
- By achieving a synthesis of ideas taken from the capability and possibilities approach and the embeddedness approach, the author has **elaborated an integral model of participation in adult education**. The contributive features of this model are enhanced by the fact that it takes into account factors influencing the capabilities and possibilities for realization in education, but also considers the interaction of factors at different levels;
- A contributive feature is the demonstration that **educational inequalities are an important indicator of the direction of development of human capital**. This thesis

is based on the view that educational inequalities register the losses of human development in the absolute and relative aspect;

- A contribution in the theoretical aspect is the question addressed by the candidate: “Social justice with respect to what?” Analyzed through this perspective, educational inequalities are seen to be a consequence of the internal differentiation and stratification of the systems of higher education;

**A contribution strictly relevant to methodology is the construction of three new methodological tools for measuring inequalities in adult education and higher education:**

- 1) Index of inclusion in adult education, 2) Equality index, and (3) Index of adult education as a generally accessible good. The first two measure the dynamics of two of the aspects of justice: inclusion and equity. The third index is used to measure the degree to which education and adult education is conducted as a generally accessible good in terms of certain dimensions: accessibility, the existence of sufficient possibilities for training, the ability of people to cover the costs of training, and society’s commitment to this type of education.

#### **B. Applied-scientific contributions:**

Foremost, I classify under this category of contributions the fact that the candidate has applied in practice personally designed by her models of activity and of (dis)empowerment through adult education as well as an integral model of participation in adult education. The models have been applied to empirical data from an international comparative survey and, based on this, detailed analyses have been made regarding the connection between the capability to participate in education and the emerging educational inequalities; two types of activeness (stimulating and restrictive) have been identified, and two types of empowerment (realized and non-realized) have been defined.

Here are some other contributions that have practical applicability:

- The designed empirical indicators to be used in studying lifelong learning and educational inequalities;
- The author has identified connections between inequalities in the labor market integration of people with a higher education across countries and the functionality of higher education, viewed as a result of economic conditions and social policy in the respective countries;

- The positive correlation has been empirically revealed between the level of innovation in a given country and the probability that young adults will take part in informal training. Attention has been pointed to the significant differences in this correlation depending on the personal characteristics of individuals;
- Recommendations have been formulated with regard to stimulating the participation of vulnerable groups in adult education. These recommendations are for the elaboration of differentiated and particularized policies for education and adult training. In this connection, the author has pointed out the need for adult education policies to take into account the role of education for reducing social inequalities, including inequalities related to recognition.

**I entirely accept the candidate's self-assessment about the contributions contained in her research on lifelong learning, higher education, educational inequalities, and donation to education.**

### **7. Critical remarks and recommendations**

I have no critical remarks to make about the candidate's works.

Dr. P. Ilieva-Trichkova evidently has a lasting research interest in lifelong learning, higher education, and educational inequalities. In this connection, I would like to ask her about her vision of future research in this problem area. The problems that interest the candidate imply the possibility for studying new aspects of and perspectives on the matter. I can think of a series of questions in this respect. For instance, might it not be interesting to extend the study of educational inequalities by identifying the transfer of intergenerational models that determine the individual's attitude to education and analyzing that attitude as a long-term and stable strategy for professional and personal development? Is there a connection between the basic values that shape a person and his/her model of participation (active or passive, creative or neutral) in the educational process? Are young people aware that education has a transformative and empowering function and, if they are, how and under what factors do they attain this understanding? Are young people susceptible to fashionable "trends" in education and how does this subsequently affect their labor realization? Do young people – for instance, university graduates – view their education as an instrument for professional realization or do they see it mostly as a certificate that gives them the right to a certain income? As for lifelong learning, which categories of people are most inclined to take part in forms of training at different stages of their lives and how does this impact on their sense of personal realization and on their social status?

These questions suggest possible directions for further research in the field of higher education, educational inequalities and lifelong learning.

## **8. Conclusion**

I have known Dr. P. Ilieva-Trichkova since the time she came to work in the methodological department of the Institute for the Study of Societies and Knowledge – BAS. My impressions of her are excellent: she is particularly well-trained as a sociologist, is very modest, industrious, persistent in her research; she is very focused and at the same time inspired by the ambition to develop as a researcher and leave a trace in science. Over the years, Dr. P. Ilieva-Trichkova has demonstrated her excellent qualities as a theorist, practitioner and analyzer, and these are a very good foundation for her future growth as a sociologist of education.

**Based on all this, it is with full conviction that I propose to the honorable members of the Scientific Jury for the competition that they recommend to the Scientific Council of the Institute of Philosophy and Sociology of BAS to appoint Dr. Petya Ivanova Ilieva-Trichkova to the academic position of Associate Professor in Sociology, Professional field 3.1. Sociology, Anthropology and Culture Sciences. Personally, I will vote “yes”.**

30.11.2021

Sofia

Chairperson of the Scientific Jury:

Prof. Emilia Chengelova, DSc.