



**SOFIA UNIVERSITY "ST. KLEMENT OF OHRID"**

**FACULTY OF BUSINESS**

**EXPERT OPINION**

by Prof. Lalka Borisova, PhD

International Business School - Botevgrad

Professional direction 3.7. Administration and management, Scientific specialty: "Economics and management (by branches)"

Member of the scientific jury in the competition for awarding the educational and scientific degree "Doctor", announced by SU "St. Kliment Ohridski"

**Subject :** Dissertation work for awarding the educational and scientific degree "doctor" in professional field 3.7. Administration and Management, District 3. Social, Economic and Legal Sciences, DP - Economic Management

**Author of the dissertation: Silvia Nikolaeva Toneva**

**Dissertation topic:**

**"The role of dual training for the implementation of human resource management policies in the organization"**

**Reason for presenting the Review:** Participation in the composition of the scientific jury for the defense of the dissertation work, according to Order No. RD 38 – 614/28.10.2024. of the Rector of SU "St. Kliment Ohridski" - Sofia.

**1. Information for the dissertation student**

**Silvia Toneva** studied in the doctoral program "Business Management", PN 3.7. Administration and Management" in a full-time format.

The development of creative biography of the doctoral student eloquently shows the concentration of research activity in a well-structured direction in the field of human resources - dual training, as an opportunity to solve current problems in their management.

## **2. General characteristics of the presented dissertation work**

The doctoral dissertation has a volume of 234 pages (main text 190 pages, used literature, appendices), structured in two chapters. **I read** that such a scientific work should be structured in three chapters: theory; methodology and practice; guidelines and suggestions.

**First chapter ( Dual training. Possibilities for solving current problems in human resources management )** has a marked theoretical character. The doctoral student analyzes the literary sources on the subject and presents the definitions of leading authors for the main definitions in the system of professional education and training. The content is structured in 13 paragraphs and main conclusions on the topic.

The **first and second paragraphs** focus on basic definitions in the system of vocational education and training and the theoretical orientations of training based on practice. The essence of the term "education" (teach, learn, educate) is clarified, Aristotle is cited as the creator of the most consistent system of ideas about the social essence of education. The doctoral student rightly noted that education combines **training and education** to ensure the individual's readiness to fulfill social and professional roles.

On the other hand, **training** is defined as a form of teaching and learning, the purpose of which is a constant change in human behavior and abilities and is closely related and dependent on learning and development, a comparison is made between "development" and "change". The concepts of "activity" and "awareness" and their role in forming the personality of the students and making sense of the learning result are clarified. The conditions for the manifestation of consciousness are also systematized. The interpretations of the concept of "attitude" and its relationship with the educational activity are determined - orientation towards the educational activity, educational activity in its implementation, satisfaction with it.

The PhD student builds on the content with analysis and substantiation of the concepts of "ability" and "competence". Definitions of well-known authors on the subject are cited,

emphasizing professional skills and personal characteristics. The two concepts should not be considered separately, since competence is seen as composed of competencies ( $n_1 + n_2 + \dots$ ), and they, in turn, as a sum of (knowledge + skills + abilities).

The doctoral student draws her own conclusion that the concept of "competence" is defined as permanent traits and characteristics that determine work performance and supports the opinion that "professional competence is a set of many diverse characteristics that support and ensure successful performance, it is motivationally bound and situationally conditioned", which I define as **a scientific contribution**.

The term "suitability for employment" is defined as a synonym for "qualification", but the difference between them is also highlighted, as well as the opportunities for professional realization - depending on the competencies possessed. This set of personal and professional characteristics is also complemented by "personal capital", as a package of individual characteristics, which I think are competencies.

The doctoral student also analyzes the concept of "profession" (as a type of work activity that is usually a source of livelihood and requires certain knowledge, skills and abilities (competencies), which are provided through training). The concept of "qualification" as an individual's ability to solve professional problems of varying complexity is also clarified.

**it a weakness of the work** that the doctoral student does not clearly define what is the opinion of leading authors and what is the author's definition, which should be accepted as a scientific contribution? For example, are the definitions of "profession" and "qualification" author's?

The PhD student focuses her research on the theoretical orientations of learning that are grounded in practice and in support presents Kolb's Experiential Learning model, the idea being that learners are encouraged to participate in all stages of the cycle, rather than simply relying on the preferences of their learning style. According to the PhD student, experiential learning promotes active participation, critical thinking, creativity, problem solving, collaboration and communication skills.

For the benefit of combining learning and practice (acquiring experience), several models of leading authors on the subject are presented, such as: Model 4C-ID by Y. van Marienbord; the ARCS (attention, relevance, applicability, confidence, satisfaction) model of J. Keller on the integration of motivation in the design of the learning process; model by Robert

Heinich and Sharon Smaldino (ASSURE); The "Backward Design" model; R's learning model. Gane.

All of these models support the proposition that in a work-based learning environment, people engage in work tasks and collaborate with others, resulting in effective skill acquisition. Self-directed learning theory posits that people take responsibility for their own learning and actively seek learning opportunities. In practical workplace learning, people can identify areas in which they want to develop their skills and look for opportunities to do so.

In the **third paragraph** (Regulatory regulation and state policy in the researched area) learning through work (dual system), the doctoral student examines the provisions of numerous normative documents by means of which training is organized, drawing a **reasonable conclusion** that the normative process for organizing the dual system is well regulated and specifies the procedure for including all interested parties in it.

The **fourth paragraph** analyzes the dual form of education in the Bulgarian education system. It is established that Bulgaria has traditions in organizing practical training with the aim of acquiring professional competences by young people. Examples are given from Bulgarian schools, where educational and training companies are created according to developed projects for reforms in professional education, in which students learn to work in a real business environment (the National Financial and Business High School, according to a Bulgarian-Austrian project). There are also examples of other forms of vocational education in different periods (UPK, Bulgarian-German center for vocational training, DOMINO project under the Bulgarian-Swiss cooperation program, support from SMEs). The doctoral student completes the analysis with the one admitted in 2023. National strategy for the development of small and medium-sized enterprises (2021-2027), where in the section "Digitalization and skills" a goal is set, which is formulated as follows: Promotion of dual training (training through work) in professions and specialties related to with digital technologies and STEM (science, technology, engineering and mathematics). The benefits of training for young people's career planning and their first steps in the profession are included.

Based on the reviewed and analyzed literature and the conducted studies, the doctoral student analyzes the implementation of the dual system in a number of European countries, systematizing the characteristic features for each country, which **I consider a scientific contribution. However, I believe** that this analysis belongs in a separate chapter, the Good

Practices paragraph, and not in Chapter One. The characteristics of dual education in countries outside the EU, but with an education system close to ours, were also highlighted.

Doctoral student Silvia Toneva makes **a general analysis**, according to her, the comparative review of the practices of the dual system at home and abroad proved that the dual education system offers the most effective format for mastering a profession, providing students with the opportunity to develop practical skills and competencies, a practice-based learning is the most effective way to develop professional competencies. In this way, the PhD student argues that the largely identified heterogeneous models of dual learning promote the building of human capital useful for both business and society. The thesis about the role of practical training for the full mastery of a given profession is confirmed, which **I consider a scientific contribution and merit of the doctoral student.**

The dissertation research from the 7th to the 13th paragraph examines issues related to HRM policies by analyzing the Human Resource Management (HR) System by individual policies: demand planning policy and job design; recruitment and selection policy; policy for orientation and adaptation of newly appointed employees; remuneration and social benefits policy; training and career development policy and performance appraisal policy. The doctoral student cites examples from different HRM systems and models, analyzes their characteristics, and justifies the application in her dissertation of the theory of Lazier, one of the leading economists in the field of labor economics.

As a result of the analysis and theoretical statements of leading authors on HRM policies, the doctoral student draws main conclusions about the relationship between the indicators of the effectiveness of HRM policies and dual training, proving this relationship with a set of indicators for the effective implementation of policy goals, which **I accept as a scientific contribution**, which, in my opinion, should have been in the Third Chapter.

The path and stages of conducting the empirical research are outlined in the Second Chapter.

**In Chapter Two ( Presentation and analysis of the results of the conducted research )**, the doctoral student describes the research methodology, the information sources and the results of her own empirical research.

The research includes:

- Revealing the key points of the implementation of the dual model through initial structured interviews with experts in the field;
- Outline of a primary questionnaire structure and its development in two consecutive questionnaire surveys;
- Discussion of the specific features of dual training and its relation to specific HRM policies in two focus groups with different participants.

The PhD student substantiates the need for the proposed systematic approach in the analysis, as the focus of the research is the concept of developing employability in persons involved in practical training and the possibility of using it as an additional channel for personnel selection.

The empirical study was built on the basis of the following sequence:

- Disclosure of the main characteristics of the research object;
- Outline the role of dual training for the implementation of HRM policies in the organization;
- Exposure of the Bulgarian-specific features of the application of the dual form, as well as the areas in which improvements can be sought.

Data for the empirical study were provided by:

- Structured interview with dual education experts;
- Pilot study with representatives of a target group of experts;
- Survey research with a target group of human resource management experts;

The results of the study have been analyzed and shown graphically, and based on the statistical data, it is established that the number of students is increasing for the period 2020-2023.

In order to prove the benefit of dual training, with the help of a questionnaire, the advantages and disadvantages of implementing dual training were checked among 55 respondents from training institutions, consulting companies and business representatives who were familiar with or participated in dual training - in information campaigns or as a partner. More than half put in the first place the benefit of developing practical skills in trainees, and as a disadvantage - the commitment of employers to participate in a partnership, which is explained by the fact that they prefer to use a ready-made product. The insufficiently good image of VET and the lack of correspondence between curricula and the requirements of

business are also cited as a disadvantage. The doctoral student makes a justified conclusion that these shortcomings concern the entire VET system in Bulgaria, although in recent years a number of information campaigns have been made to popularize VET, the fact is that it is not a preferred choice for students.

The suggestions for dual training made by the respondents in response to open-ended questions were also analysed.

The doctoral student also conducted a survey of 104 employers participating as training partners, who answered 26 questions, divided into several areas : advantages and disadvantages of dual training; qualities of youth; profile of respondents and measures to improve training. The answers were analyzed, the relevant conclusions were drawn, the formulated tasks were confirmed, the research thesis was proven.

A comparative analysis of good practices has been made, conclusions from focus groups have been systematized on the connection between dual training and HRM policies with experts and trainees in dual form. The proposals made by the experts are summarized - to introduce mechanisms and incentives for small and medium-sized business employers; participation of business in the determination of the specialties on which to prepare the admission plan for dual education at the regional level; to provide methodological support for smaller firms that do not have the capacity.

Learners suggest that the student's age be taken into account when choosing a mentor; to offer attractive financial incentives for trainees and their mentors; to offer professional diagnostics and career guidance to candidates for inclusion in a dual form of education with the aim of correctly guiding them towards mastering a suitable profession.

As a result of the research data , **the doctoral student offers** opportunities to strengthen the link between HRM policies and dual training through improved efficiency of the dual system through two models: a model of a mechanism for determining positions suitable for a dual form of training in the organization and a model for analysis and assessment of the employability of persons trained in a dual system, which **I accept as a scientific contribution** and enrichment of the literature on HRM. **I believe** that in the second model the terms "skills and abilities" can be replaced with competencies.

Here was the place to draw systematized conclusions and recommendations to eliminate the weaknesses in the implementation of dual education marked by the respondents.

**The title** is clearly formulated and is closely related to the doctoral thesis, the subject, the purpose, the tasks and the structure of the research. The purpose, tasks and subject of the research are correctly formulated, and the object - the model of dual training in Bulgaria with its elements (normative base, business, educational institutions and trainees and their mentors in the companies) - has been successfully chosen. **The topic** of the dissertation is on a problem that is current and significant from a managerial and economic point of view, and the exposition in it does not fully meet the necessary methodological and methodical requirements related to the writing of such a work - I consider the absence of the 3rd chapter **to be an omission** . which contains conclusions and recommendations, good practices. The literature used is correctly cited, and the empirical material is presented with appropriate explanations of the nature and reliability of the relevant research methods and the sources of information used.

### **3. Evaluation of the obtained scientific and scientific-applied results**

I accept the contribution points in the dissertation research.

The scientific and scientific-applied results in the dissertation work enrich the methodological approaches and reveal new facts in the field of modern dimensions of the subject of the possibilities of implementing human resource management policies in the organization by applying the dual system. The application of these achievements can improve the management practice in the country in terms of HRM policies, achieving stabilization of the processes of training in dual form, subsequent hiring and employment of personnel, which will increase their competencies and motivation for career development, which will increase the effectiveness of the processes in the organization. As a result of the theoretical review of the literature and the results of the empirical research, the doctoral student has proposed innovative models for binding the two sides - ED and HRM, which have different applications.

The indicated scientific and scientific-applied achievements in the dissertation are the personal work of the doctoral student. The statement of contributions correctly represents the scientific achievements of the dissertation.

### **4. Evaluation of dissertation publications**



The doctoral student has the necessary publications for the dissertation - independent articles and reports and in co-authorship, with which she meets the minimum requirements.

## **5. Assessment of the Autoabstract**

I must note that the doctoral student correctly presents the content of the dissertation in the proposed Abstract. The statement of contributions correctly represents the scientific achievements of the dissertation.

## **6. Critical notes, recommendations and questions**

As a member of the jury for the competition for the educational and scientific degree "doctor", **I consider** the absence of the 3rd chapter to be an omission, I have already explained it in the text. I found some inaccuracies that do not reduce the quality of the dissertation research, more precisely, they are recommendations, spelling rules:

1. The combination of knowledge, skills, abilities forms the competences of the person;
2. When writing periods, only Arabic numerals (1st, 2nd 20th century), not Roman (I, II, ... XX century) are used, p. 22;
3. When enumerating – a sign (;) is placed at the end, not a period, this is not a sentence;
4. At the end of the titles, a period is not placed (eg Chapter One. Dual training. Possibilities for solving current problems in human resource management, p. 15);
5. I believe that the author's contributions and definitions should be stated more clearly in the text, I have already noted it as a weakness of the work.

I have no notes on the doctoral student's research activity. A good knowledge of the theory and practice of the system of dual education and HRM is a good basis for upgrading research in this direction.

## **7. Conclusion**

In conclusion, it can be said that the dissertation is a complete, bona fide scientific research in a current and significant scientific field, it contains scientific contributions in the field of dual training and HRM in an organization, its benefits are justified, its own models are

presented, it has been tested practically, through an empirical study conducted. The doctoral student knows the basic literature on the topic well enough, can clearly formulate research problems, analyze, systematize and make sense of classic and new theories and concepts, construct a research apparatus, conduct empirical research, draw reasoned conclusions.

This gives me grounds for a positive conclusion that the dissertation **corresponds** to the requirements of ЗРАСРБ, therefore with **full conviction I offer** to the esteemed jury to vote on the award of **Silvia Toneva** the educational and scientific degree "*doctor*".

Sofia, November 18, 2024

SIGNATURE:  .....

(Prof. Dr. Lalka Borisova)