



**Capability**

**Creativity**

**Maturity**

# Bulgarian IT Industry Barometer 2012

HONOURED PARTNERS:



2 October 2012

Sofia, Bulgaria

GOLDEN SPONSORS:



SILVER SPONSOR:

HæmimONT

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## Overview

### **Bulgarian IT Industry Barometer 2012**

- Fourth edition of the Bulgarian IT Industry Barometer
- Provides statistics for the period 2009-2011 and forecasts for 2012
- Conducted by GOPA Consultants, Germany for the Bulgarian Association of Software Companies (BASSCOM)
- Survey conducted in the period March – April 2012
- Participants: 40 BASSCOM and Bulgarian Web Association (WBA) member companies

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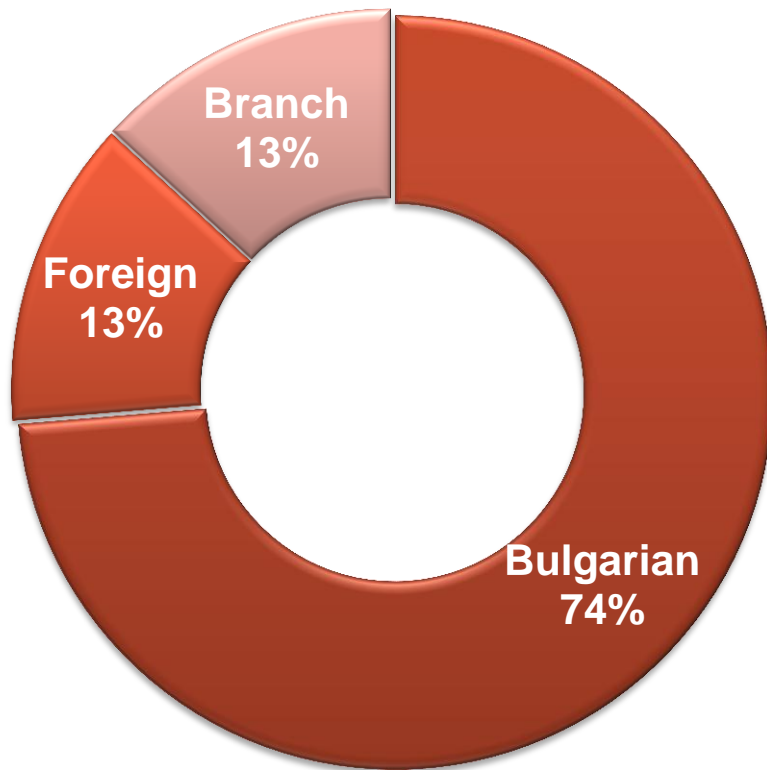
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## Participants by Stakeholder



- More than  $\frac{3}{4}$  (31) of the companies have a Bulgarian majority ownership
- One-tenth (4) of the companies have majority foreign control
- 13% of the companies (5) work only for their parent company

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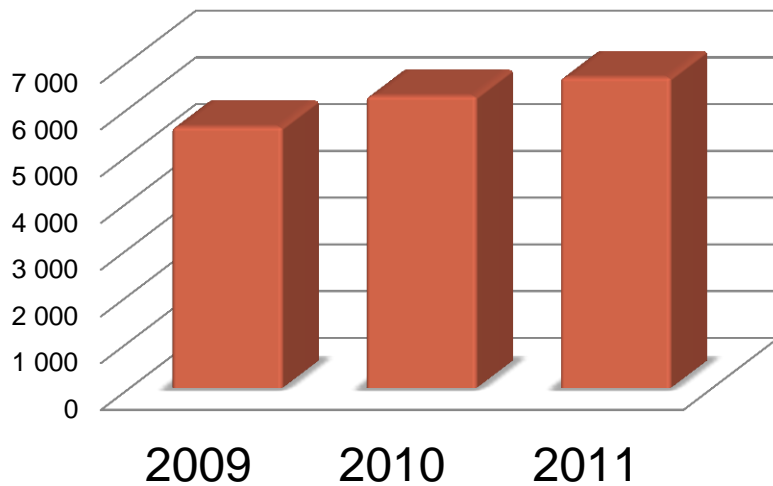
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## Average Sales

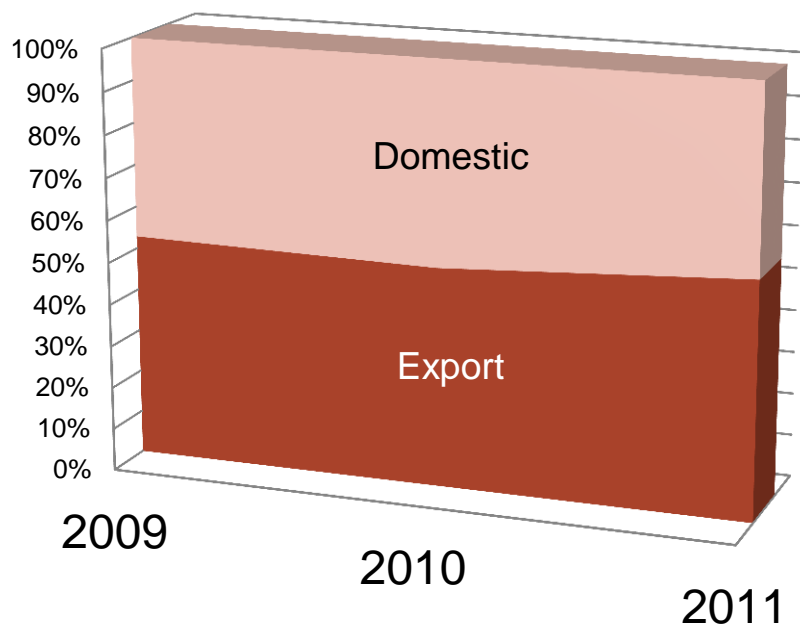


Average sales per company (BGN 000's):

- 12% increase in 2010
- 6% increase in 2011



## Export



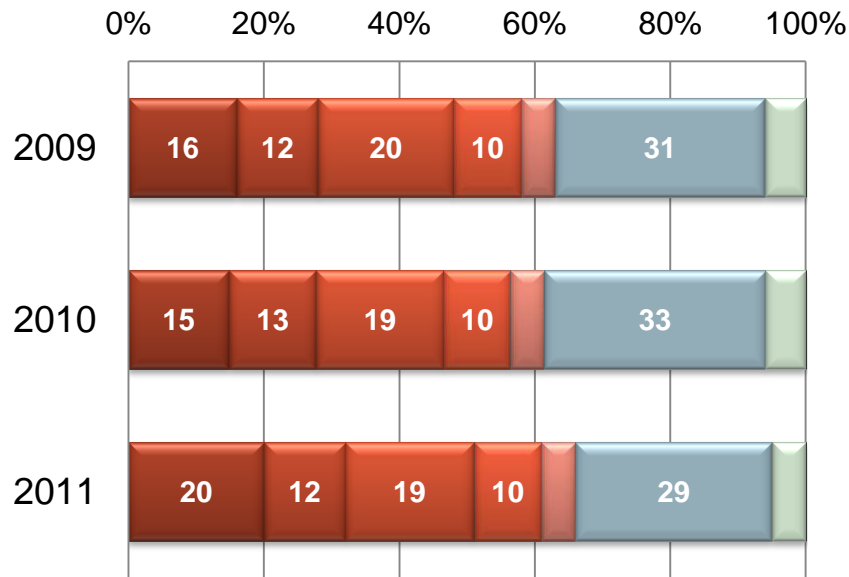
### Export (% of Total Sales)

- More than 50% of total sales comes from exports
- Share of Exports remains stable: 53%, 52% and 56% in the years 2009 – 2011





## Export Destinations



Export Destination (as % of export):

Majority to Europe (63%, 62% and 66%)  
and North America (31%, 33%, 29%)

- German speaking countries (Germany, Austria, Switzerland)
- Scandinavian countries
- UK
- Rest of Western Europe
- Central and Eastern Europe
- North America (USA, Canada)
- Rest of the world

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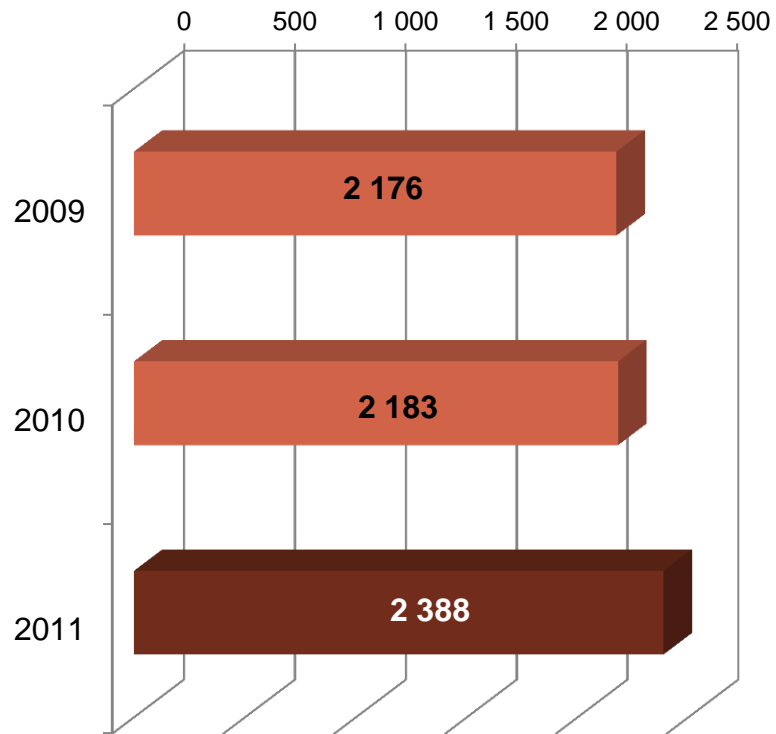
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## Compensation



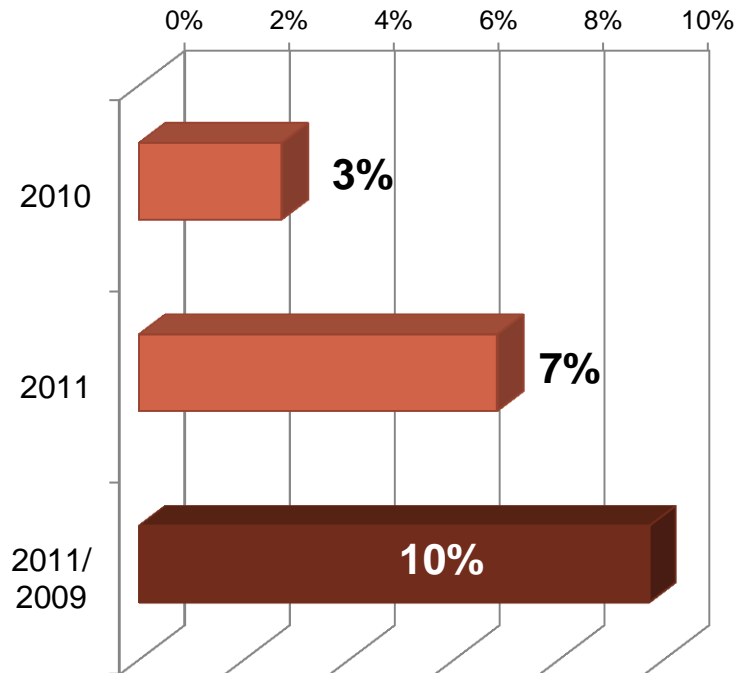
Average gross salary in BGN

Change (%) :

- +0.3% (2010/09),
- +9.4% (2011/10),
- +9.7% total (2011/2009)



## Employees



### Number of employees growth (%)

- +3% (2010/09),
- +7% (2011/10),
- +10% total (2011/2009)

## Open Positions

Average open positions per company: **7.8**

Average time to replace - **1.7 months**



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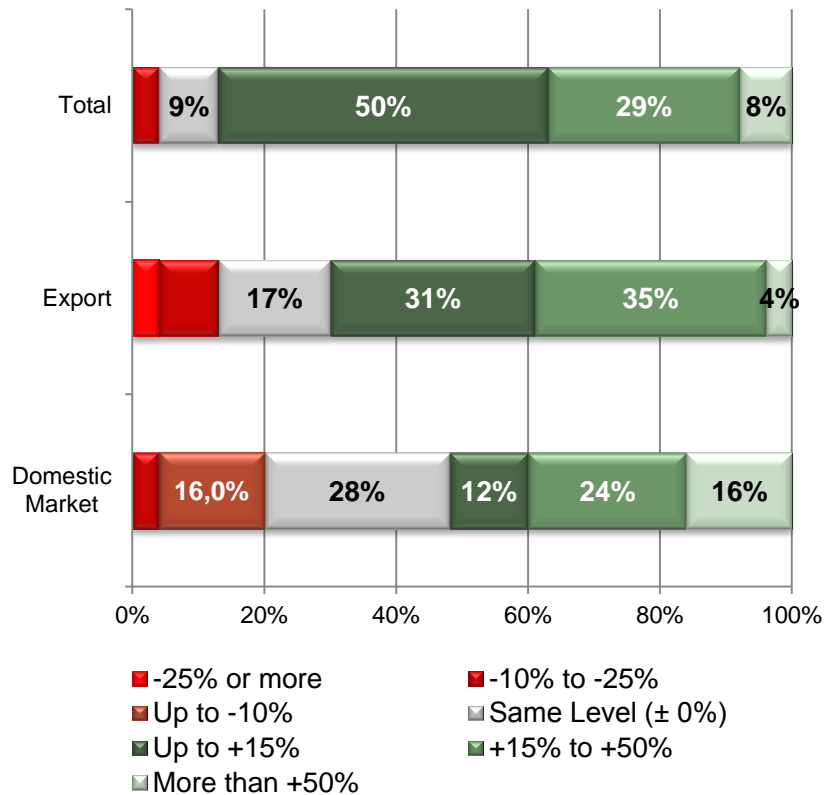
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## Sales Projections 2012

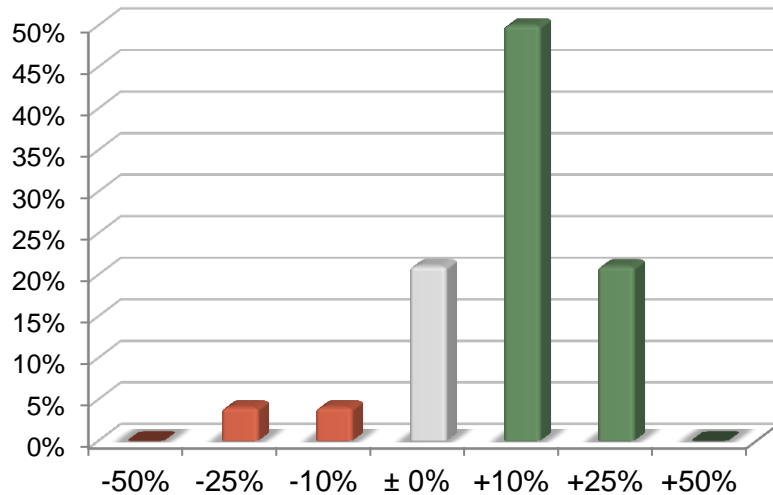


Sales projections - expected change in 2012 compared to 2011 (% of respondents)

- Positive outlook
- Majority expecting moderate to strong growth, mainly from export



## Employee Projections 2011



Expected change in number of employees for 2012 compared to 2011 (% of respondents)

- Majority (over 71%) expect an increase in the number of employees:
- Most (50% of all answers) forecast an increase of up to 10%
- Over 1/5 expect an increase of 10 – 25%





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**Thank you for your attention!**

**Georgi Zahariev**  
Board Member,  
BASSCOM