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<thead>
<tr>
<th>Capability</th>
<th>Creativity</th>
<th>Maturity</th>
</tr>
</thead>
</table>

**Bulgarian IT Industry Barometer 2012**

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2 October 2012
Sofia, Bulgaria
Contents

Introduction
Participants
Financial Statistics
Human Resources
Forecasts
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
Contents

Introduction

Participants

Financial Statistics

Human Resources

Forecasts
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.
Contents

Introduction

Participants

Financial Statistics

Human Resources

Forecasts
Average Sales

Average sales per company (BGN 000’s):

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

 Introduction
 Participants
 Financial Statistics
 Human Resources
 Forecasts
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**
Contents

Introduction
Participants
Financial Statistics
Human Resources
Forecasts
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