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Capability *Creativity* *Maturity*

BASSCOM

2010

Sofia

Bulgarian IT Industry Barometer

(BITIB)

2010 Edition

Supported by:

GOPA

WORLDWIDE CONSULTANTS

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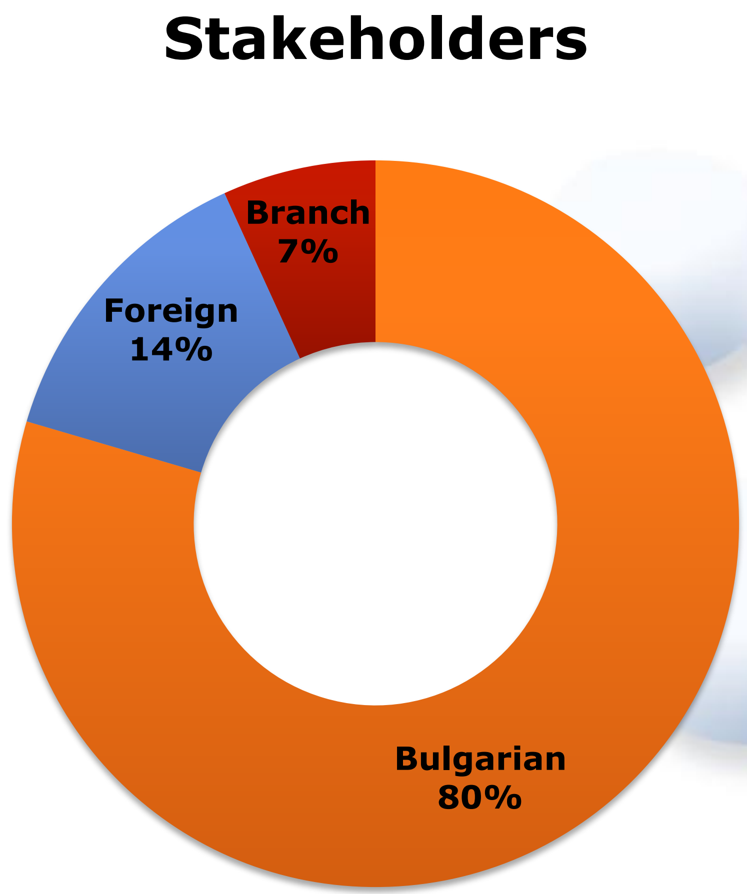
Agenda

1. Overview
2. Statistics
3. Forecast
4. Hot Topics

Overview

- Online questionnaire among BASSCOM and Bulgarian Web Association member companies
- Conducted in the period Jan. – Apr. 2010
- 57 companies participated
- Developed in cooperation with GOPA, Germany

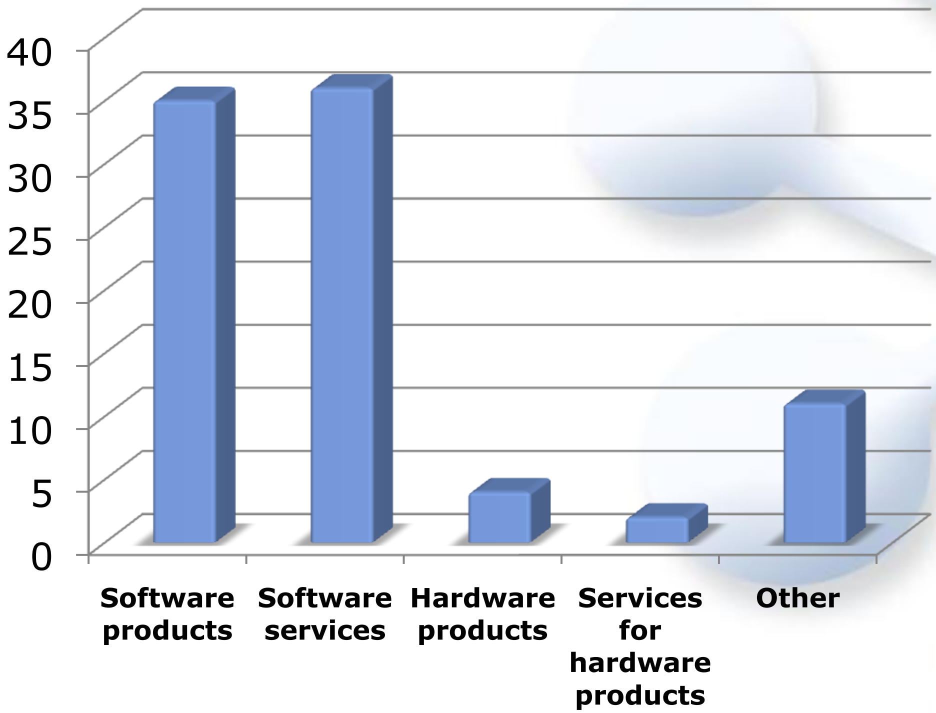
Type of company



- Predominantly Bulgarian companies
  (>50% Bulgarian ownership)
- 14% have majority foreign ownership
- 7% work only for parent company

Type of company

Products / Services
(number of respondents)



- Majority active in:
  - Software Products
  - Software Services
- Only a few companies are active in hardware
- Other activities are: Consultancy (mainly), but also Training and Embedded Software

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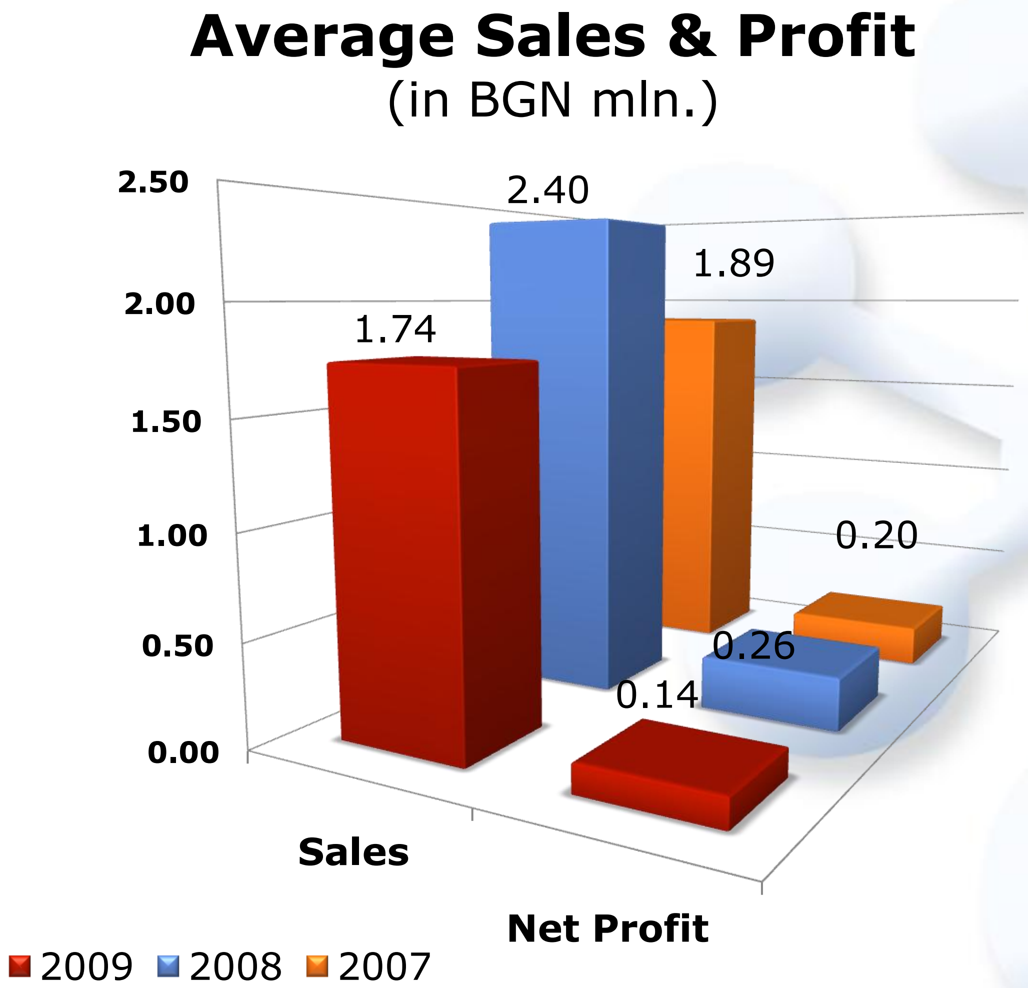
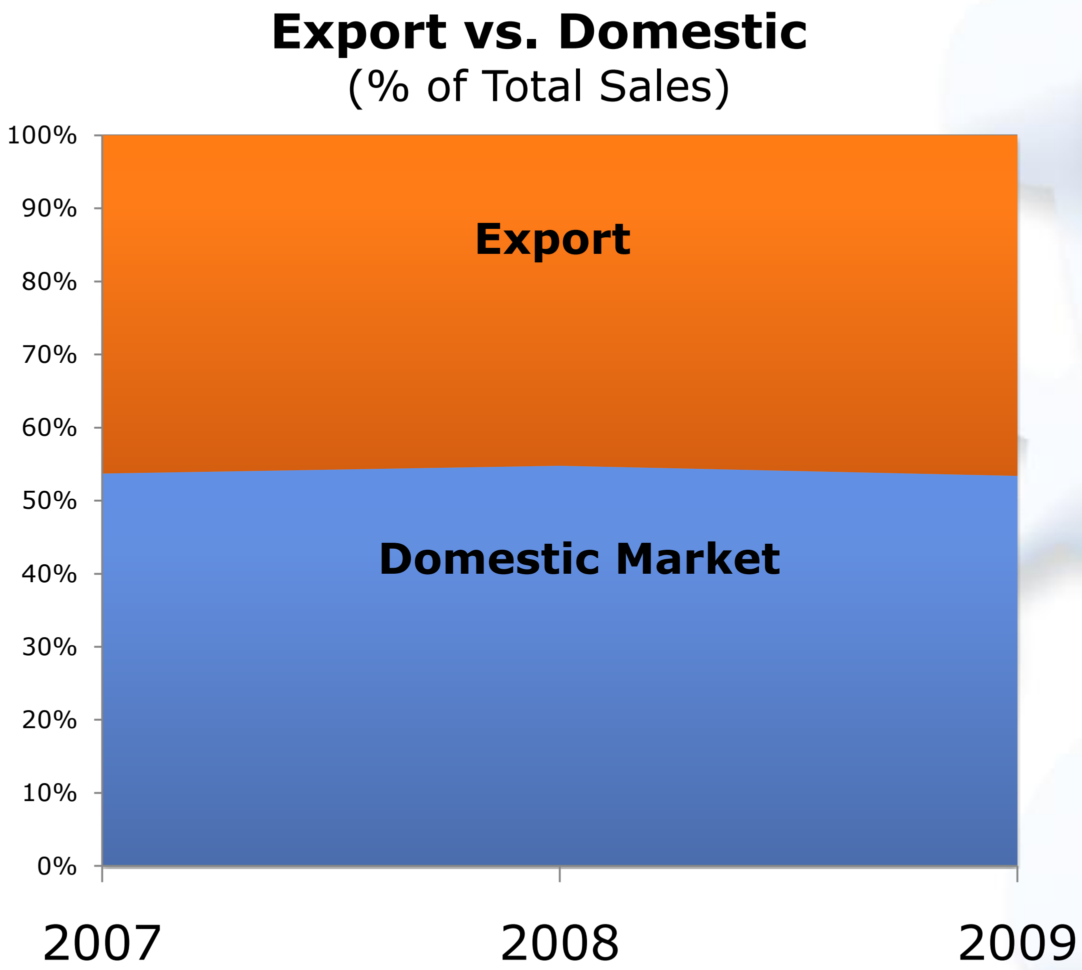
Sales & Profit



- Change in Sales :
  - 2007/8: +27%
  - 2008/9: -27%
- Change in Net Profit
  - 2007/8: +31%
  - 2008/9: -46%
- 2008: Positive development
- 2009: Financial crisis

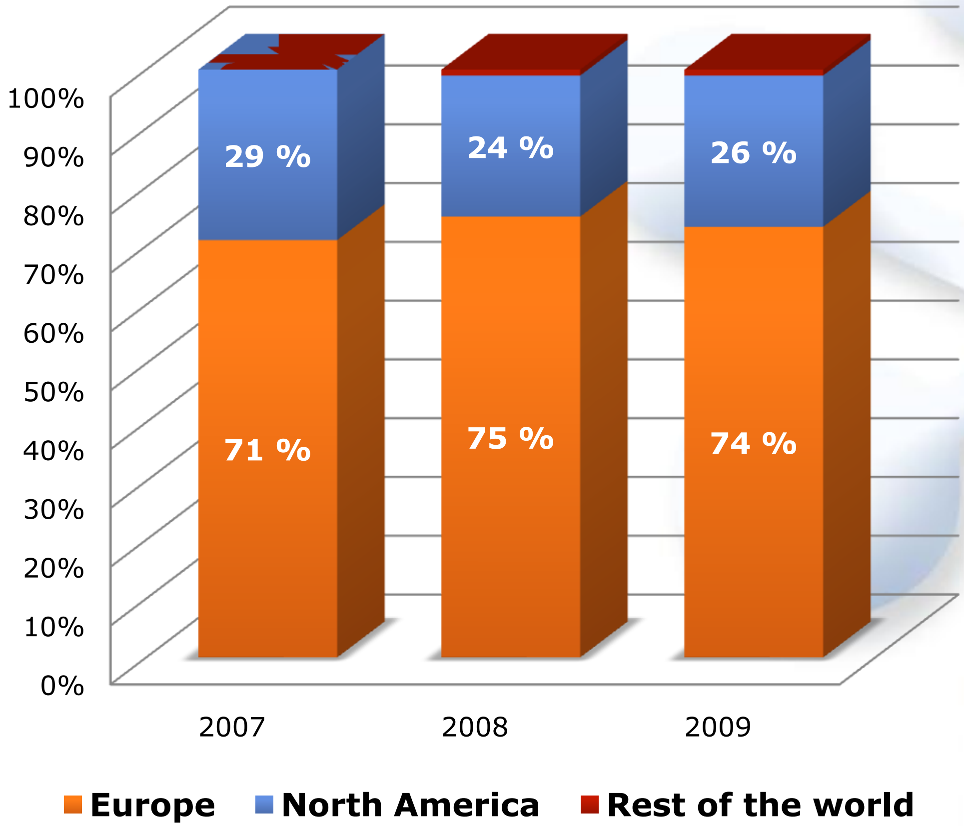
Sales



- ~50% of sales come from export
- No significant variations

Sales

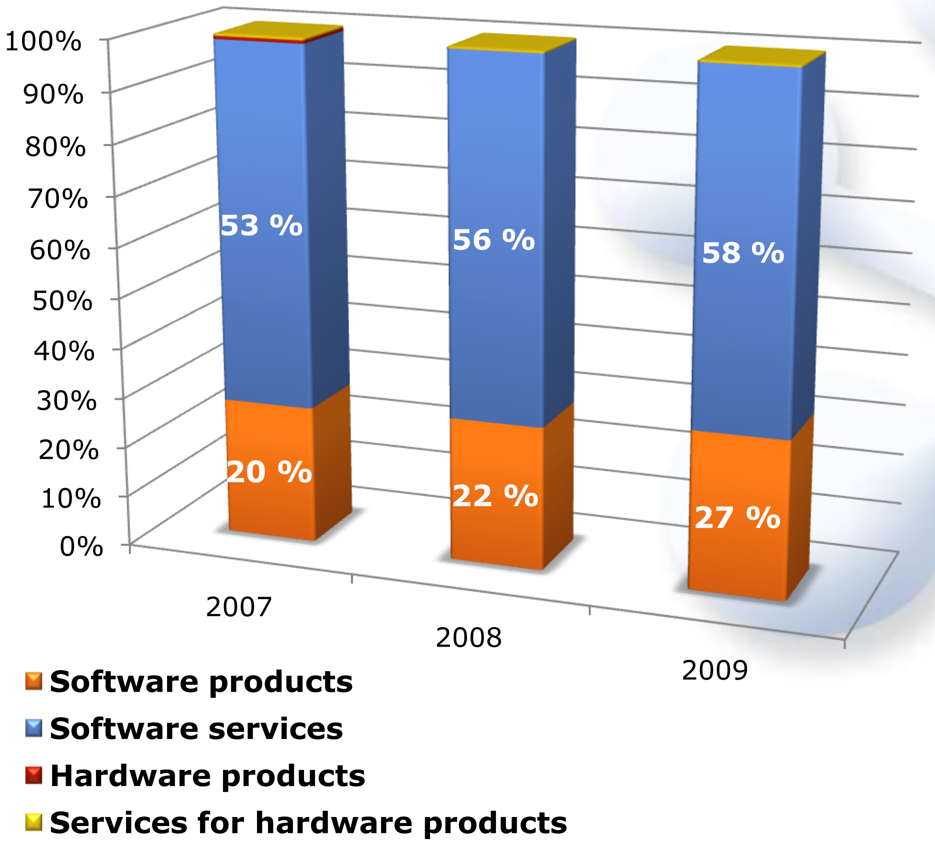
Export Destination
(% of Sales)



- Largest export destination is Europe
- North America: ~ 1/4

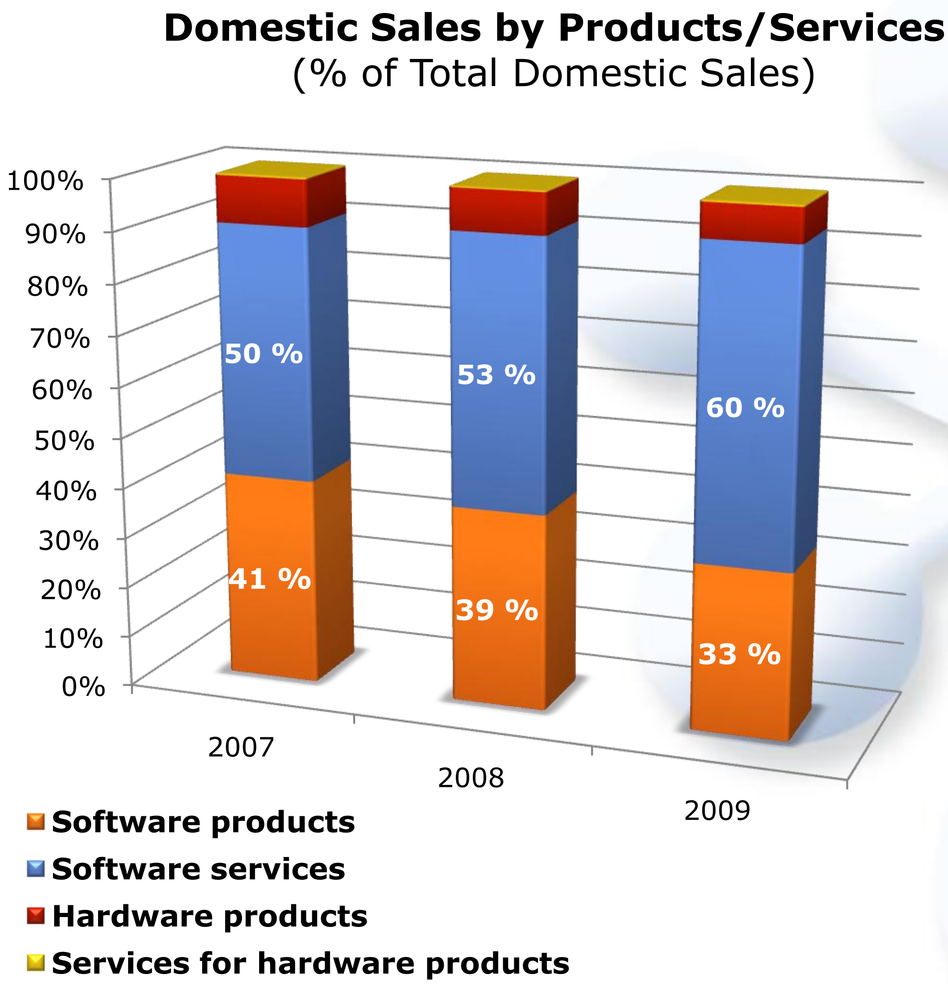
Sales

Export by Products/Services
(% of Total Export Sales)



- Export is mainly Software Services and Products
- Trend: Increase of Software Products export - growth by 35% for the whole period.

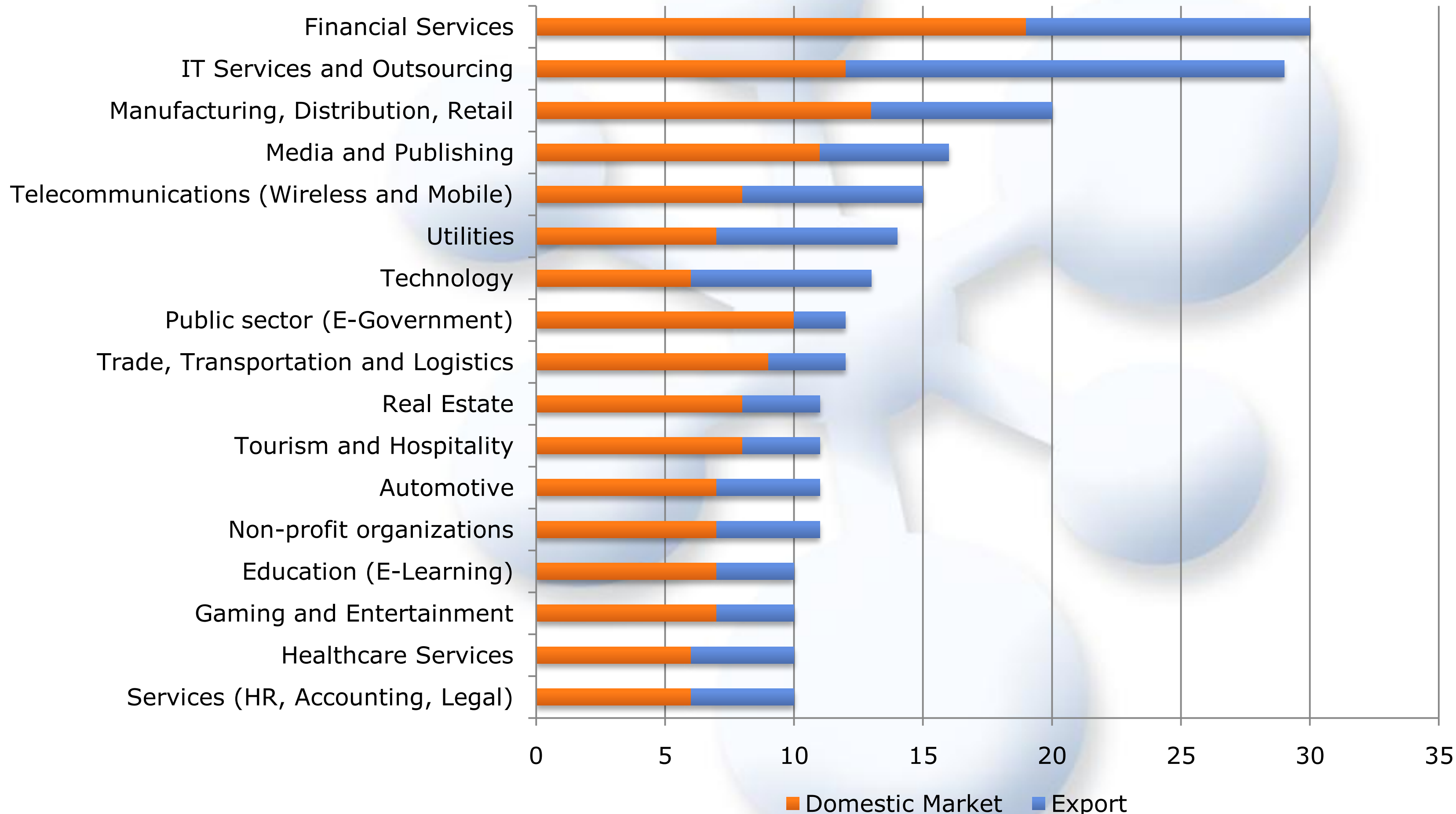
Sales



- Software Services dominate the domestic market
- Decreasing share of Software Products

Markets

Markets by Industry (number of respondents)



Markets

Horizontal Markets (number of respondents)

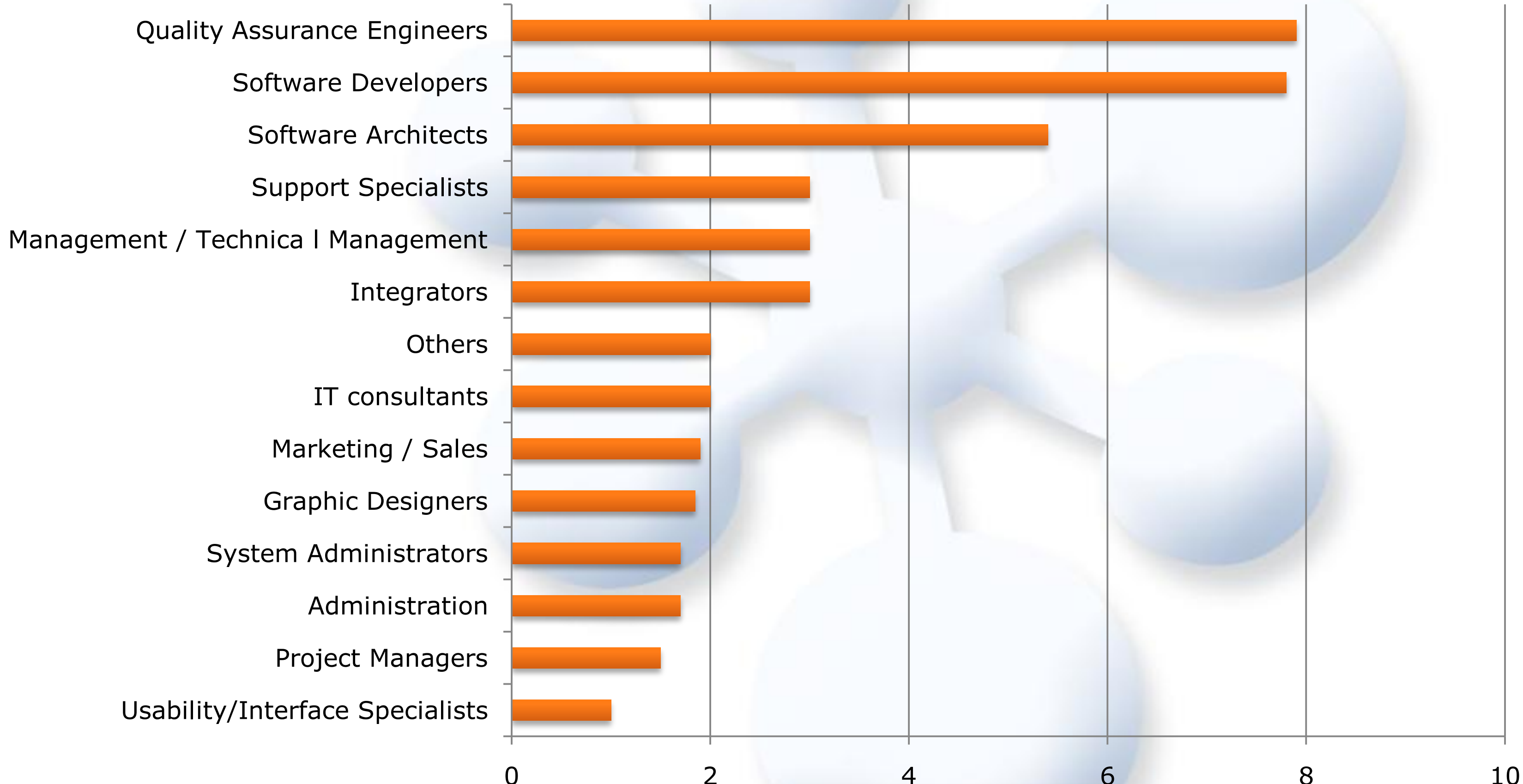
Employees

Category	Total			Average per Company		
	2007	2008	2009	2007	2008	2009
Software Developers	1,026	1,134	1,163	41	43.6	46.5
Multimedia Programmers	11	15	14	3.7	3.8	3.5
Graphic Designers	26	32	36	2.2	2.7	2.6
Usability/Interface Specialists	6	7	7	1.5	1.8	1.8
Quality Assurance Engineers	211	242	242	12.4	13.4	15.1
Software Engineers/Architects	30	38	48	3	3.5	3.4
IT consultants	35	45	56	7	6.4	7
Support Specialists	36	46	115	4	4.2	9.6
Integrators	5	25	32	2.5	8.3	10.7
System Administrators	32	34	40	1.9	2	2.4
Project Managers	63	80	82	3.9	4.7	4.8
Management / Technical Management	53	57	65	3.3	3.4	4.1
Marketing / Sales	31	46	51	2.2	3.1	3
Administration	97	106	104	5.4	5.6	5.5
Others	26	34	35	4.3	5.7	5
TOTAL*	1,714	1,974	2,131	63.5	70.5	76.1

* TOTAL is not the sum of all categories because some respondents have provided only the total number of employees without a break-down by category

Open Positions

Open positions (average per company)



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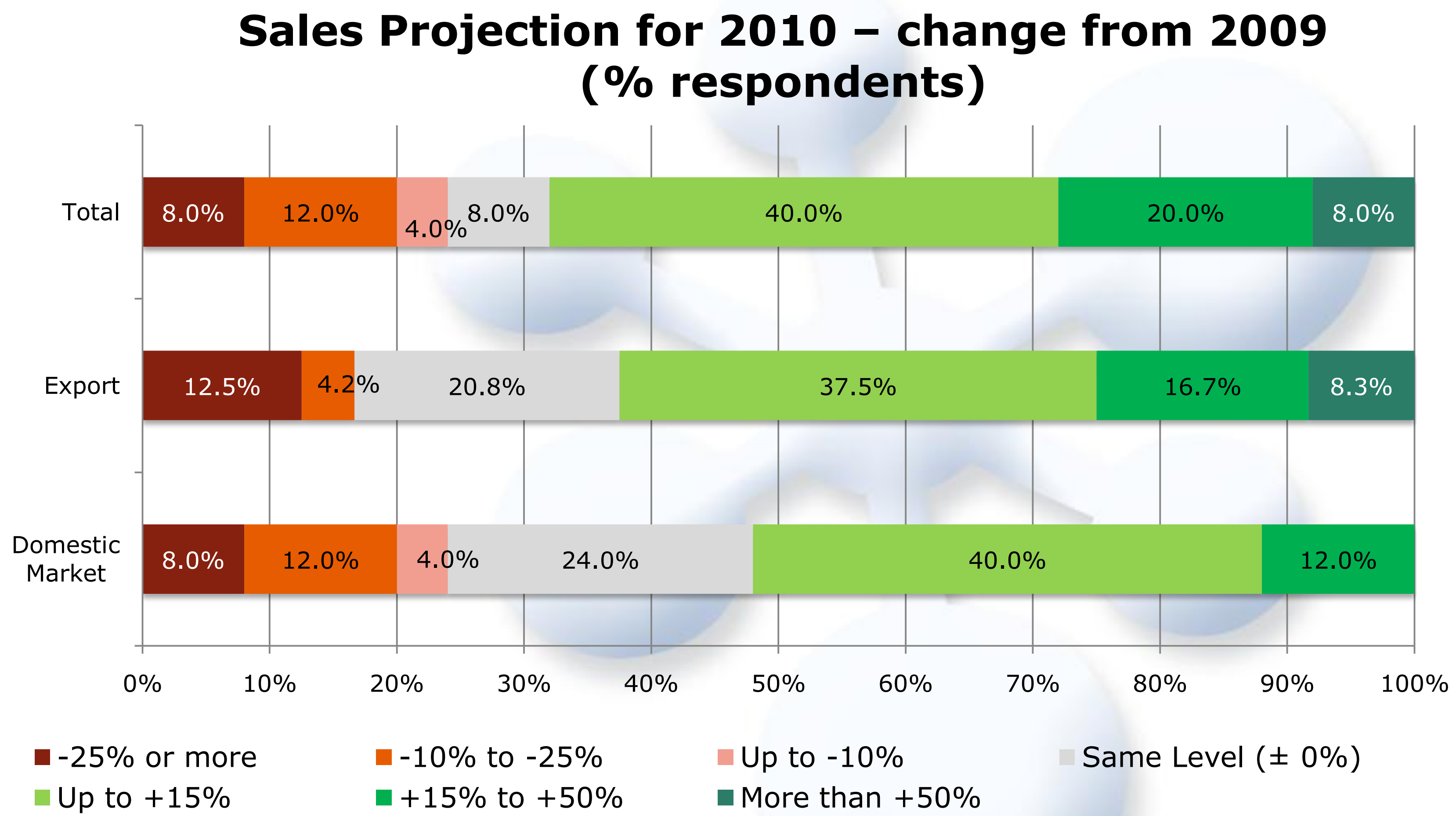
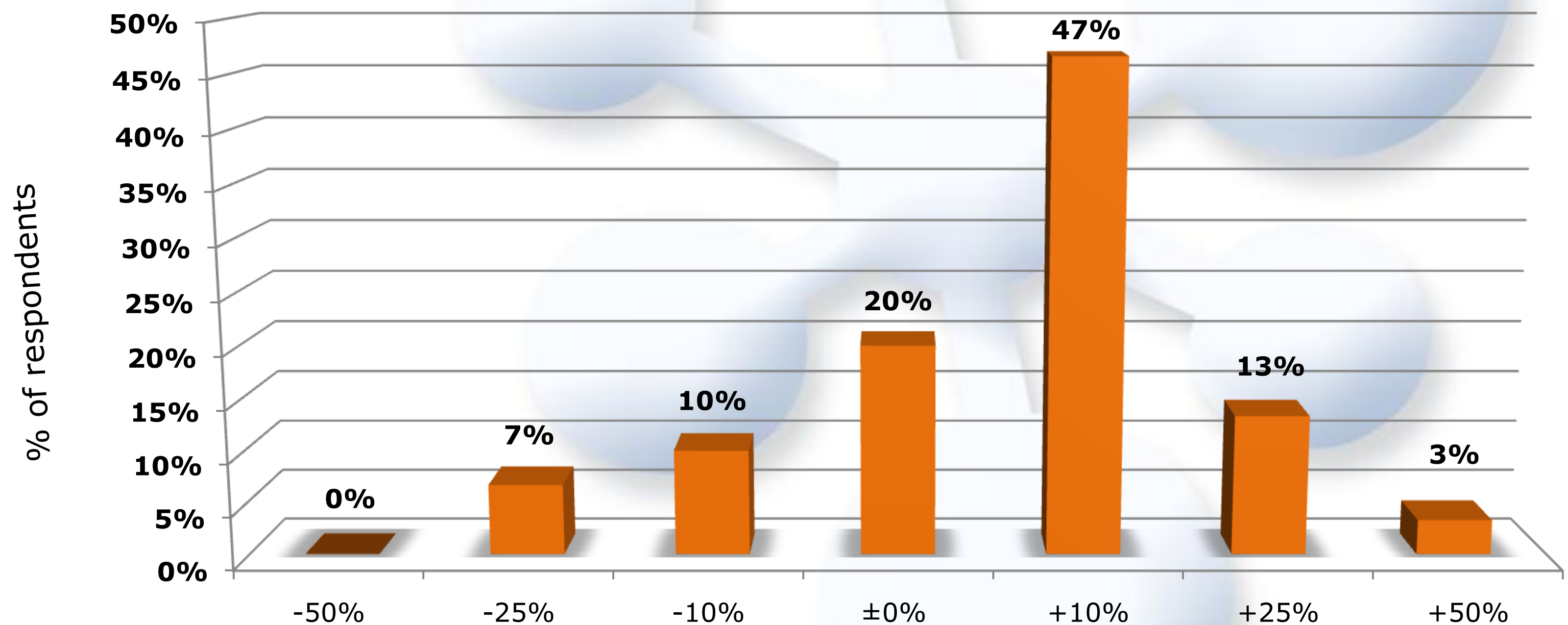
Sales Forecast



HR Forecast

Number of Employees for 2010 – change from 2009
(% respondents)



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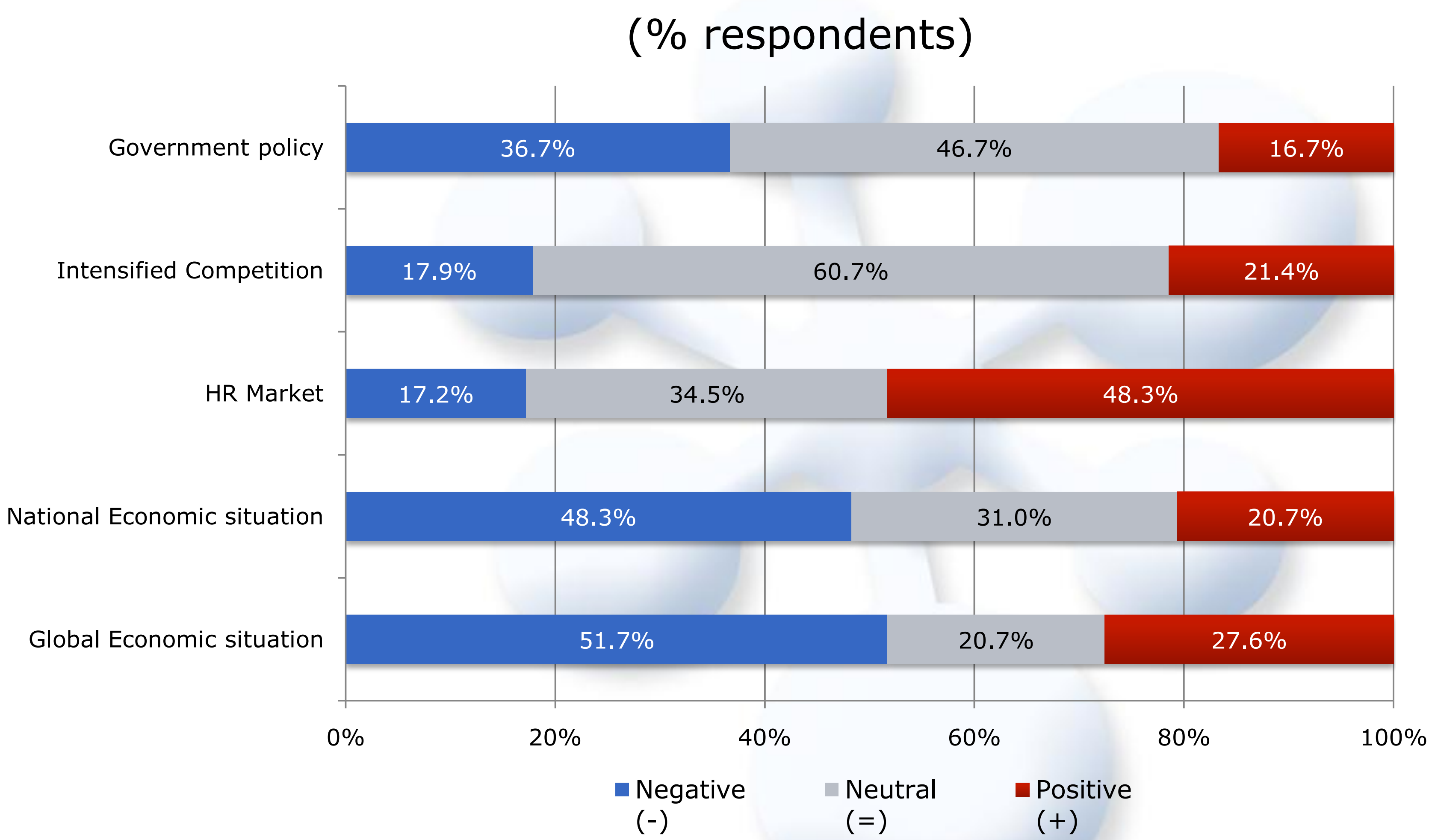
4 **Hot Topics**

Impact of External Factors on Business



Thank you for your attention!

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