

# BULGARIA: BPO FACTSHEET

InvestBulgaria Agency – January 2007

## 1. Why Bulgaria

- EU member
- Cultural proximity
- Geographic proximity
- 10% corporate income tax
- Friendly business regulatory framework
- Talent pool
- Multilingual workforce
- Low personnel turnover rate – 10%-15% per annum
- Low company cost:
  - EUR 300-470 average for contact agents
  - EUR 550-650 average for supervisors
- Low annual average wage growth rate – 10%



## 2. Talent pool – Business Studies

University Programs	Students Enrolled	Graduates
Finance & Accounting	17,078	5,881
Economics	12,445	3,576
Business Administration	12,095	1,929
Marketing	4,805	1,441
International Business Relations	4,606	1,402
<b>Total</b>	<b>51,029</b>	<b>14,229</b>

Source: National Statistics Institute

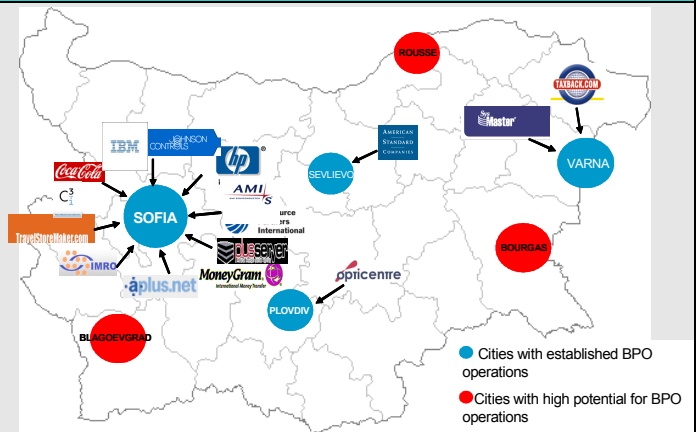
## 3. Talent pool – Technical Sciences

University Programs	Students Enrolled	Graduates
Computer Systems and Technologies	6,564	833
Informatics	5,465	1,218
Communication Systems & Technologies	4,822	966
Machine Building	4,737	779
Electrical Engineering	4,016	559
Automation	2,757	513
Electronics	2,297	343
Engineering-Combined Programs	1,916	479
<b>Total</b>	<b>32,574</b>	<b>5,690</b>

Source: National Statistics Institute

## 4. Foreign Business Process Operations in Bulgaria

Date	Company	Activity	Jobs
Sep 06	IBM	Procurement Centre	n/a (1)
Jan 06	Hewlett Packard	Global services support centre	400 (2)
May 06	OPI Global	F&A support centre	20 (3)
June 05	C3i	IT help desk	50
April 05	SysMaster	Sales of SysMaster and VoiceMaster products to EMEA + technical support help desk	25
2005	Coca Cola	IT support shared services centre	~80
Jan 04	Aplus	IT support center	50
Oct 04	MoneyGram (4)	Customer support center	70
2004	PlusServer	Linux server help desk and direct marketing call centre services	50
April 03	IMRO	Direct marketing + technical support centre	~500



- (1) Plan to grow to 200 by the end of 2007
- (2) Plan to grow to 1,000 by the end of 2007
- (3) Plan to grow to 125 by the end of 2007
- (4) Outsourced to BTC

## 5. Outsource with a Bulgarian company

Company	Activity	Contacts	No. of agents
Sofica Group	Telemarketing, Data processing, Marketing surveys	<a href="http://www.sofica-group.com">www.sofica-group.com</a>	40
CallPoint Bulgaria	Telemarketing, Phone surveys, Debt collection	<a href="http://www.callcenterbulgaria.com">www.callcenterbulgaria.com</a>	75+
All Data Processing	Telemarketing, Editorial services outsourcing, Data&Information processing, Database management	<a href="http://www.aiddatapro.com">www.aiddatapro.com</a>	250+

## 6. Success Story

**Outsource Partners International**<sup>SM</sup>

**The US Outsource Partner International (OPI) opens Finance & Accounting Facility in Bulgaria**

**OPI:** Leading professional services firm dedicated solely to finance and accounting outsourcing. OPI delivers custom solutions that range from single-service functions, such as accounts payable, receivables, and payroll, to full-service F&A including tax compliance, general accounting and financial reporting

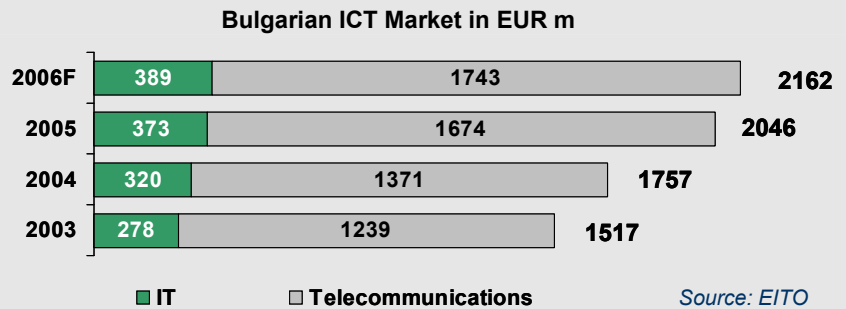
- After considering a number of locations, OPI decided to open its newest facility in Bulgaria largely due to the country's abundance of highly skilled multi-lingual professionals.
- The Sofia operation offers capacity for 125 people delivering finance and accounting services in a number of languages, including English, French, German, Italian, Spanish, Portuguese, Dutch, Polish, and Bulgarian.

# BULGARIA FACTSHEET: ICT

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## Market review

- Strong traditions
- More than 5,000 ICT companies
- Top 100 ICT companies have created 25,000+ jobs
- 16.5% yoy growth of ICT sector (2005)
- 24.9% yoy growth of IT sector (2005)
- 60% PC sales growth (2005) – the highest rate among CEE countries
- Availability of talented & multilingual work force
- Low wage growth rate – 10% per annum
- Reliable telecom infrastructure
- Reasonable office prices

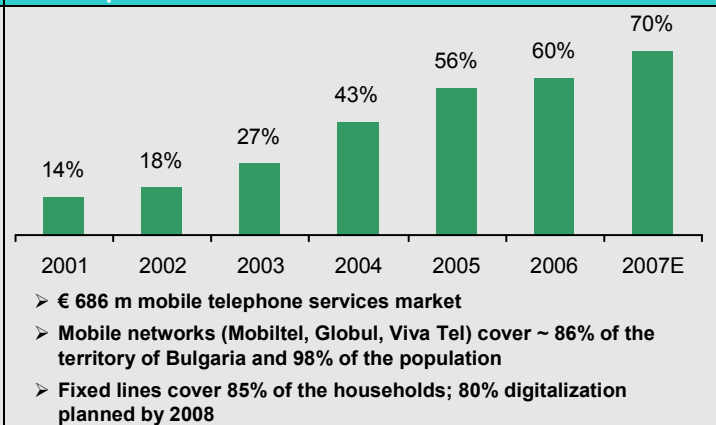


## Internet penetration



Source: DAITS [www.daits.government.bg](http://www.daits.government.bg), NSI

## Mobile penetration



## Talent pool – Technical programs

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<b>Total</b>	<b>32,574</b>	<b>5,690</b>

Source: NSI

## Labour cost

**Bulgaria - Salary level for IT positions, top end of the market, EUR**

Position	Gross salary	Total cost
Entry desk	945	1,117
Storage Engineer	2,095	2,267
Networking Engineer	1,768	1,940
Team Leader	2,688	2,860
Service Desk Agent	914	1,086
Dispatch/ Monitoring Agent	1,047	1,219
Support Specialist (Database/ Web hosting/ ERP)	1,318	1,490
Technical Owner (Database/ Web hosting/ ERP)	2,075	2,247
Support Specialist (Mainframe)	1,390	1,562
Technical Owner (Mainframe)	1,988	2,160
Support Specialist (Storage)	1,543	1,715
Technical Owner (Storage)	2,100	2,272
Support Specialist (UNIX)	1,768	1,940
Technical Owner (UNIX)	1,967	2,139

Source: BulWork, [www.bulwork.com](http://www.bulwork.com)

## Top foreign companies

Date	Company	Activity	Jobs
2006	Software AG (Germany)	Software development centre	n/a
2006	Microsoft (USA)	Technical Support Centre	100
2006	Hewlett Packard (USA)	Global Delivery Support Centre	1,000
2005	IBM (USA)	Procurement Centre	25 (1)
2004	Ami Semiconductor	Mixed-signal design centre	20
2003	Tumbleweed (USA)	Software development operation	100
2001	Johnson Controls (USA)	Technology Centre (mechanical design, electronics design, software development)	290
2000	SAP Labs Bulgaria (Germany)	Development of Java Application Server and SAP Composite Application Framework	300
1999	CISCO (USA)	Local sales support and 155 Cisco Academies	24

(1) Announced the establishment of a Procurement Centre in Oct 2006 which will employ 200 people and will service WE and Latin America

## Case study



Johnson Controls, Inc. is a global leader in interior experience, building efficiency and power solutions with 500 locations in 50 countries.

- Operates in Sofia, Bulgaria since 2001
- About 290 high-skilled IT specialists (expanding to 400 till the end of 2007)
- Main activities
  - mechanical design
  - electronics design
  - software development for automobile's interior equipment
- Customers served: DaimlerChrysler, Ford, General Motors, Renault-Nissan, Peugeot-Citroen, BMW
- Quality management systems: ISO 9001, TS16949

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