

# Bulgaria Information Technology Report 2016

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## Abstracts

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**BMI View:** The Bulgarian IT market has considerable growth potential as it is one of the least developed in Europe in terms of device and solution penetration rates in the retail and enterprise markets, which offers vendors scope for strong growth as it converges towards the European average. In the enterprise segment, penetration of enterprise software is significantly below the regional average - an opportunity that could be tapped as lower-cost cloud solutions become more widely available. The outlook is however mixed, with economic uncertainty weighing on confidence levels and spending. Our Country Risk team for Bulgaria forecasts improved economic performance over 2016-2019, but it should be noted that a weak household income growth profile and declining population are expected to see the Bulgarian IT market continue to underperform its potential, and peers, over the medium term.

### Latest Updates & Industry Developments

**Hardware Sales:** BGN708mn in 2016 to BGN757mn in 2019, a compound annual growth rate (CAGR) of 3.3%. Demand was hit by lev depreciation in 2015, but we expect spending to recover over 2016-2019, with underlying demand growth from low penetration rate and rising incomes boosted by deferred purchases from 2015.

**Software Sales:** BGN184mn in 2016 to BGN213mn in 2019, a CAGR of 6.6%. Low penetration of enterprise software solutions by large enterprises and small- and medium-sized enterprises offers growth potential over the medium term.

**Services Sales:** BGN237mn in 2016 to BGN277mn in 2019, a CAGR of 7.4%. The IT services segment is expected to outperform as software development

expands rapidly, while cloud computing adoption will also boost spending growth.

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