

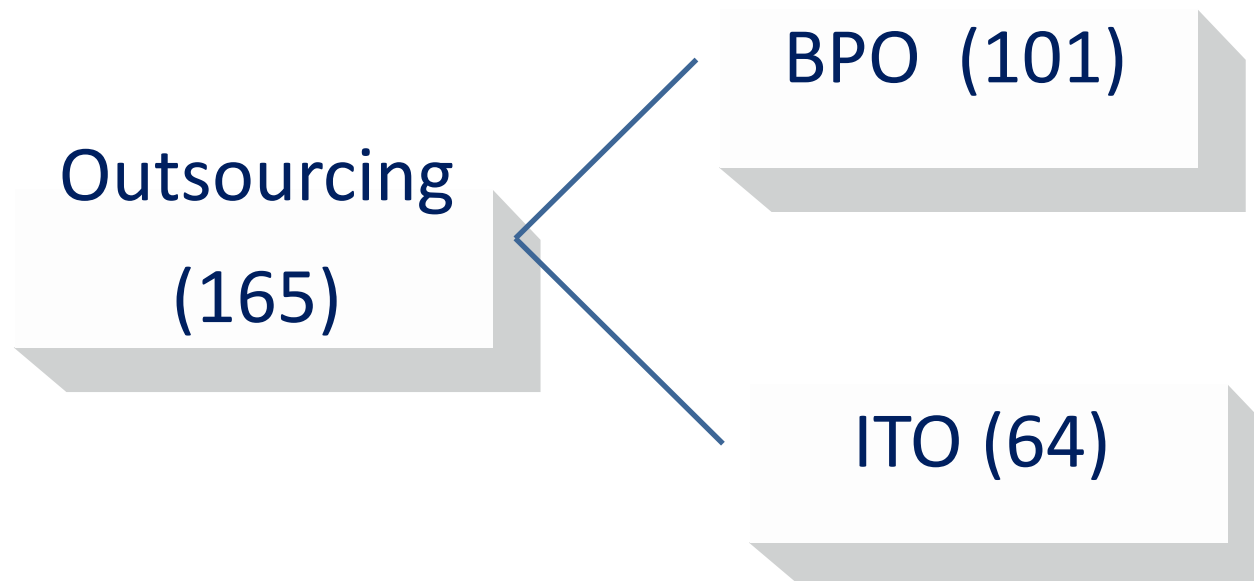
BULGARIAN ASSOCIATION
OUTSOURCING



2014 BULGARIA
OUTSOURCING
INDUSTRY

SEPTEMBER 2015

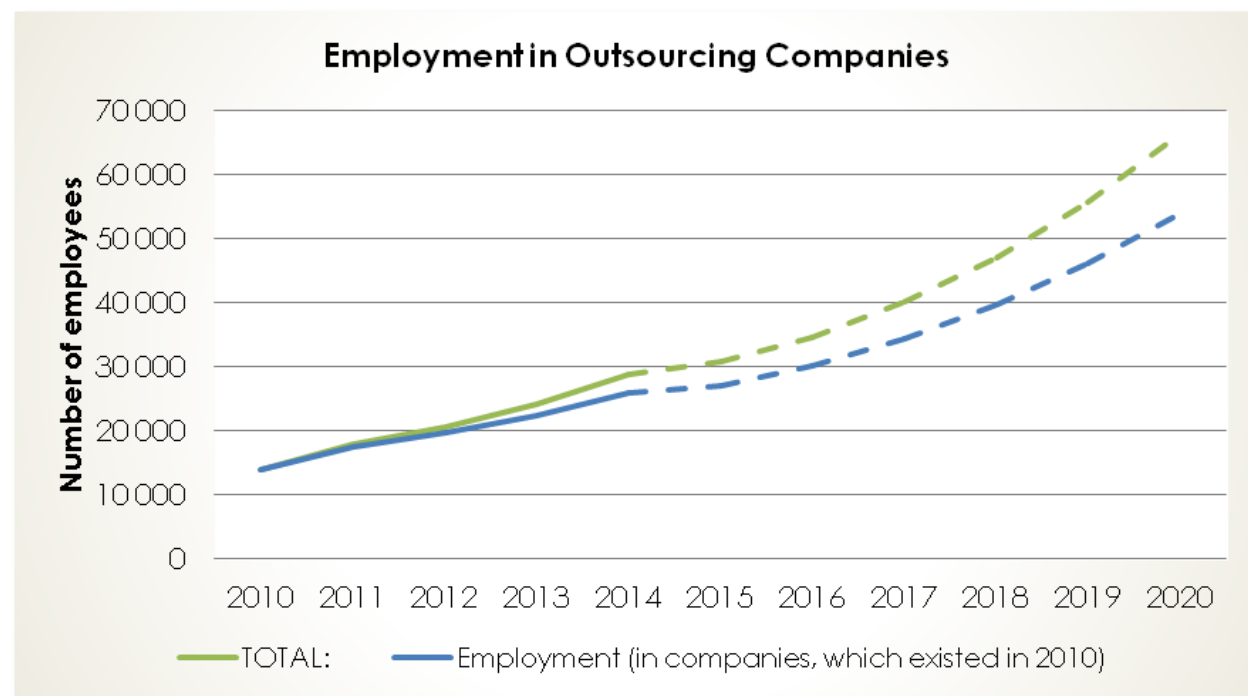
- ✓ 165 companies
- ✓ Based on Financial Statements and Official Records



OUTSOURCING SECTOR EMPLOYMENT

- Total number of FTE employees 2014: **28,764**
- Total number of employees mid-2015: **30,720***
- 4yr CAGR (2010-2014) **19.9%**
- Increase in 2014 vs. 2013 **19.5%**

- **2014/2010** DOUBLE in size
from 14 000 to 28 000
- **by 2020** TO DOUBLE AGAIN
from 30 000 to 60 000+

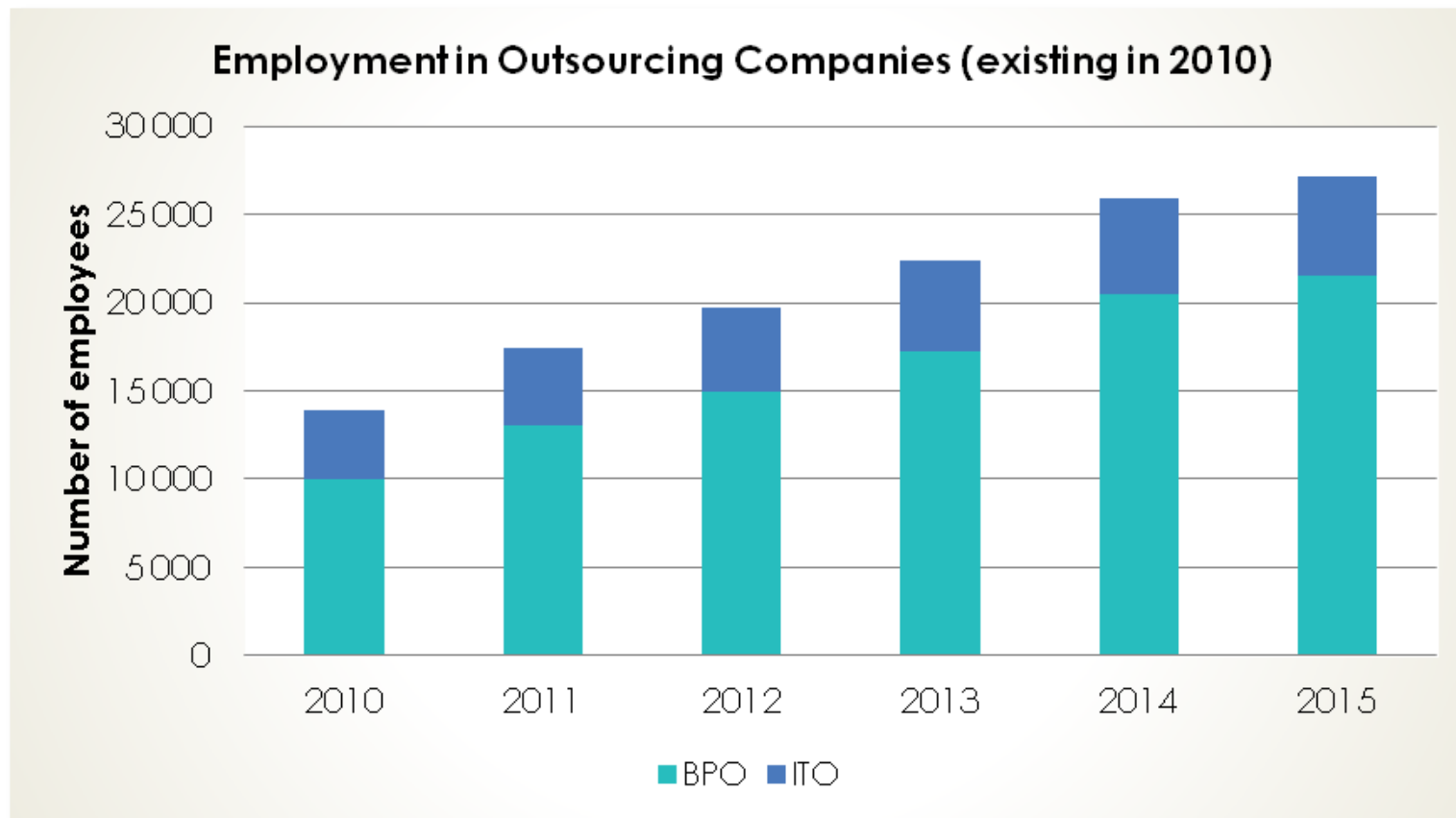


* Not FTE

Distribution of Employment

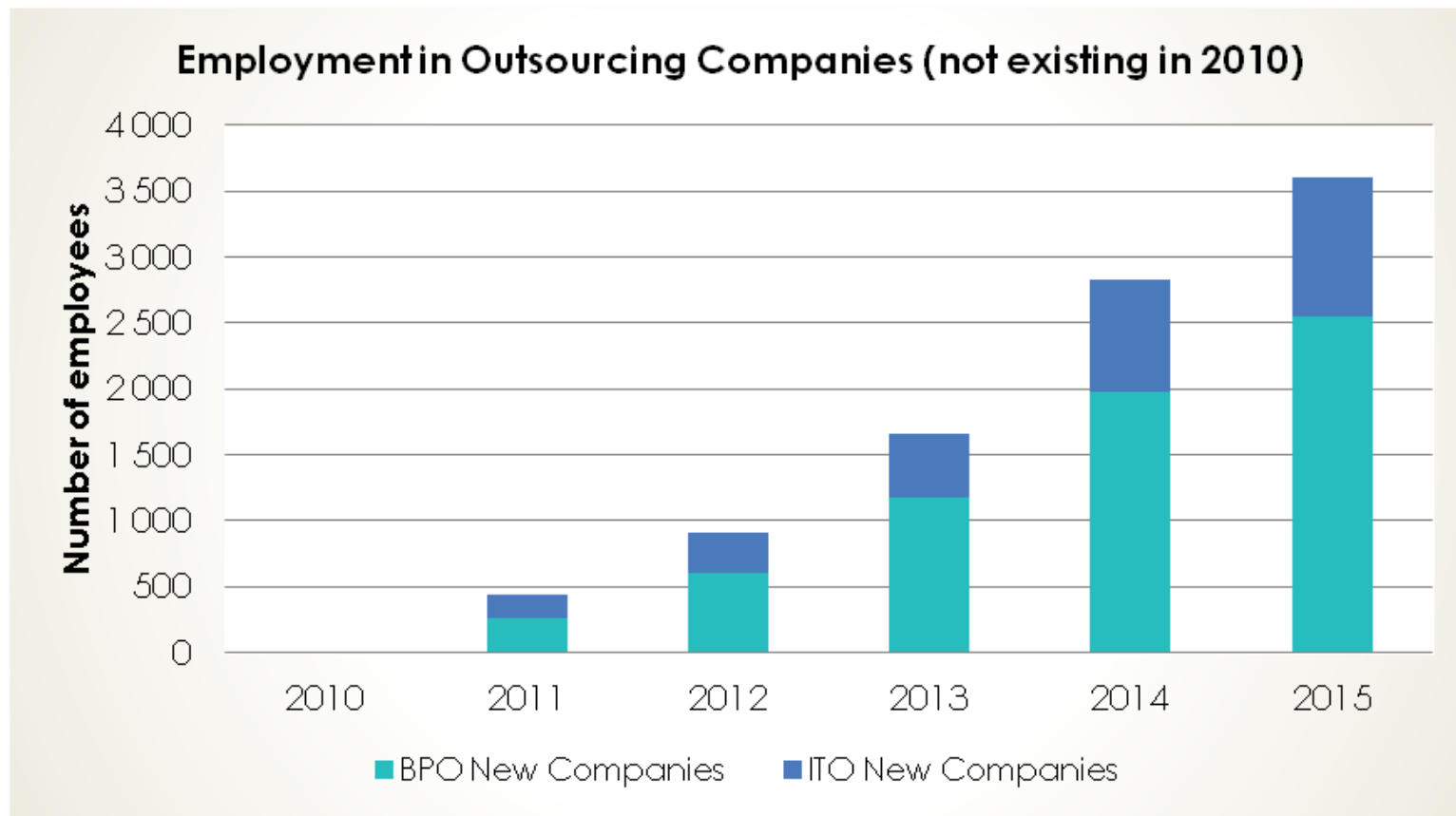
companies operating in 2010

	2014	CAGR (2010-2014)	2014/2013
• BPO: 20,435	19.6%	18.8%	
• ITO:	5,500	8.9%	5.4%

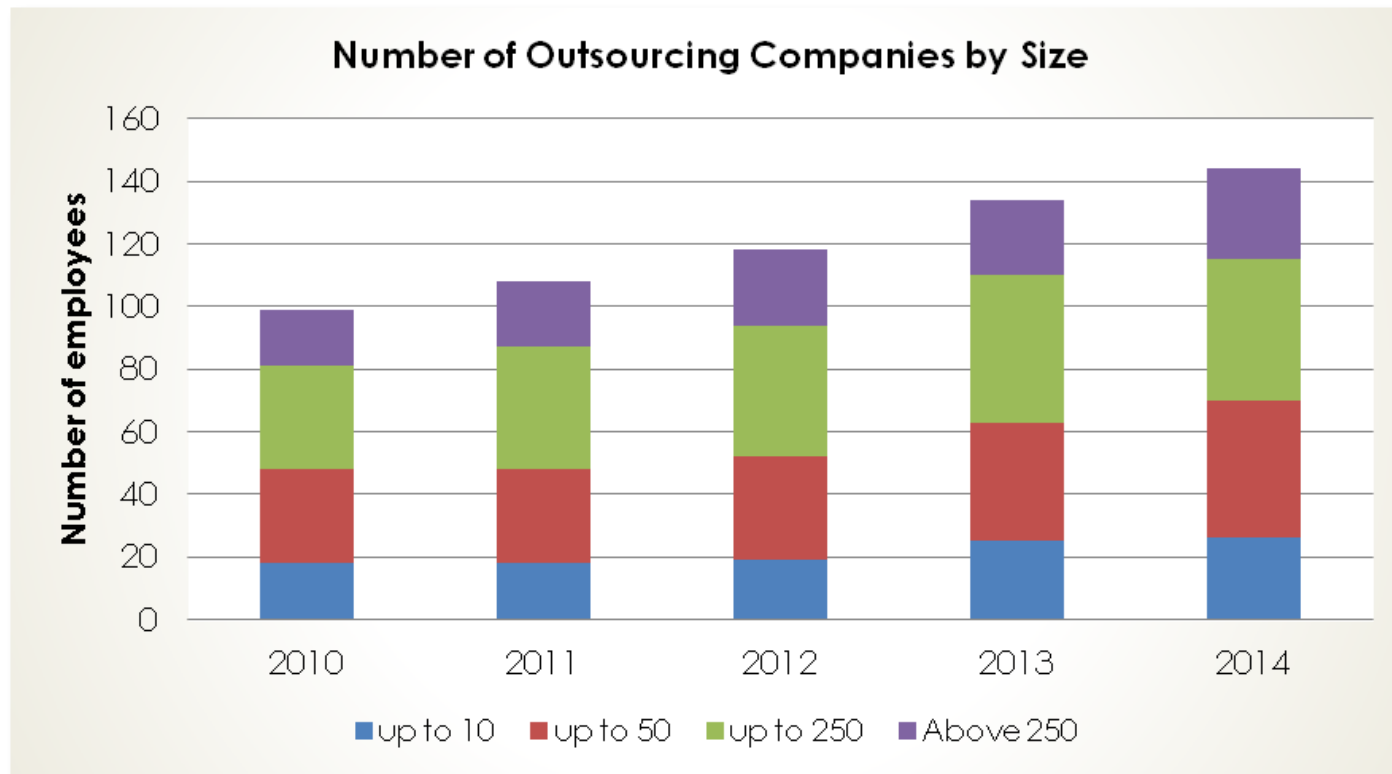


Outsourcing start-ups

	2014	CAGR (2011-2014)	2014/2013
• BPO: 1,976	95.4%		68.5%
• ITO:	853	70.9%	77.0%

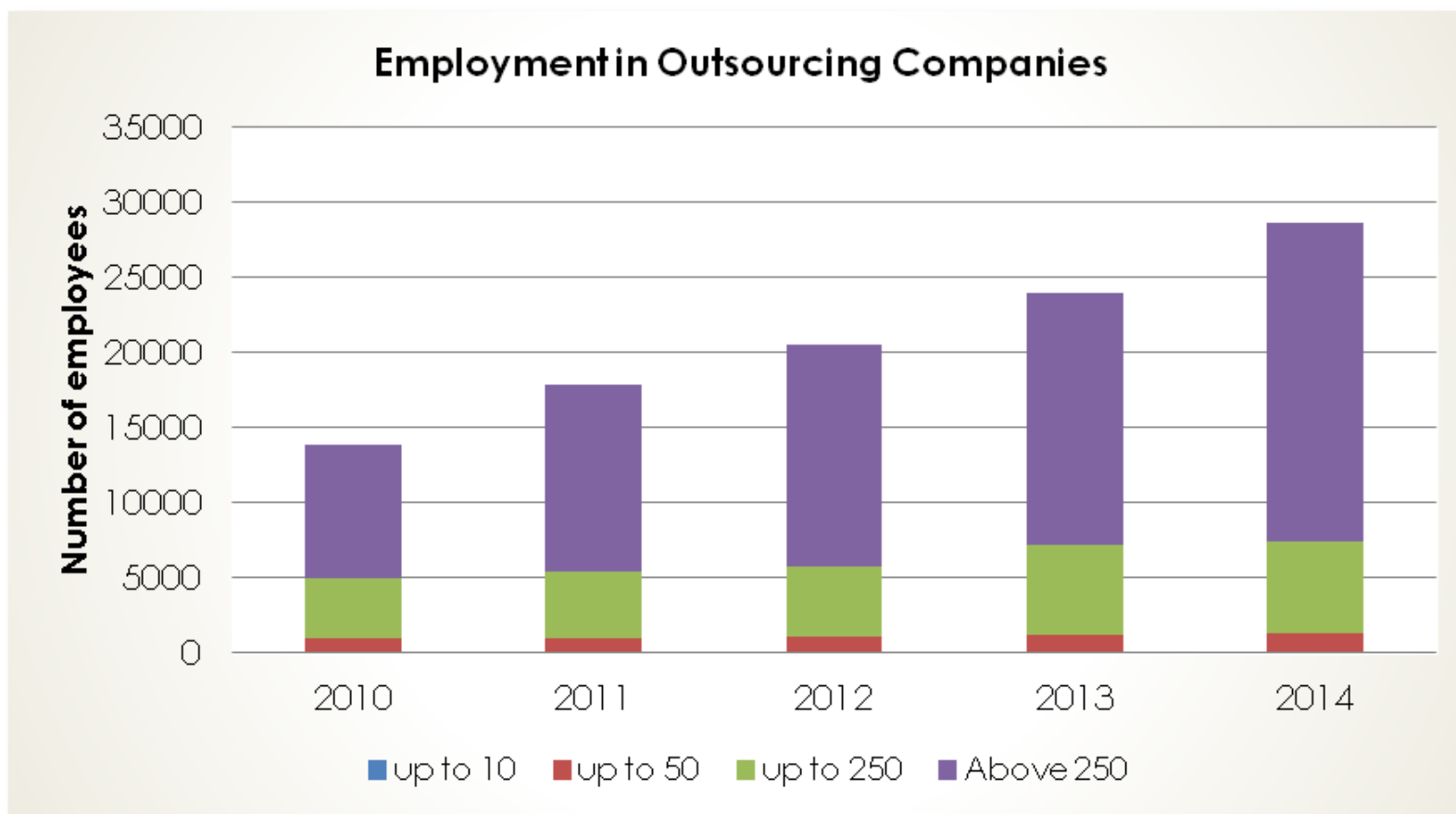


Company Size	2010	2014
<10	18	26
11 < 50	30	44
51 < 250	33	45
251>	18	29



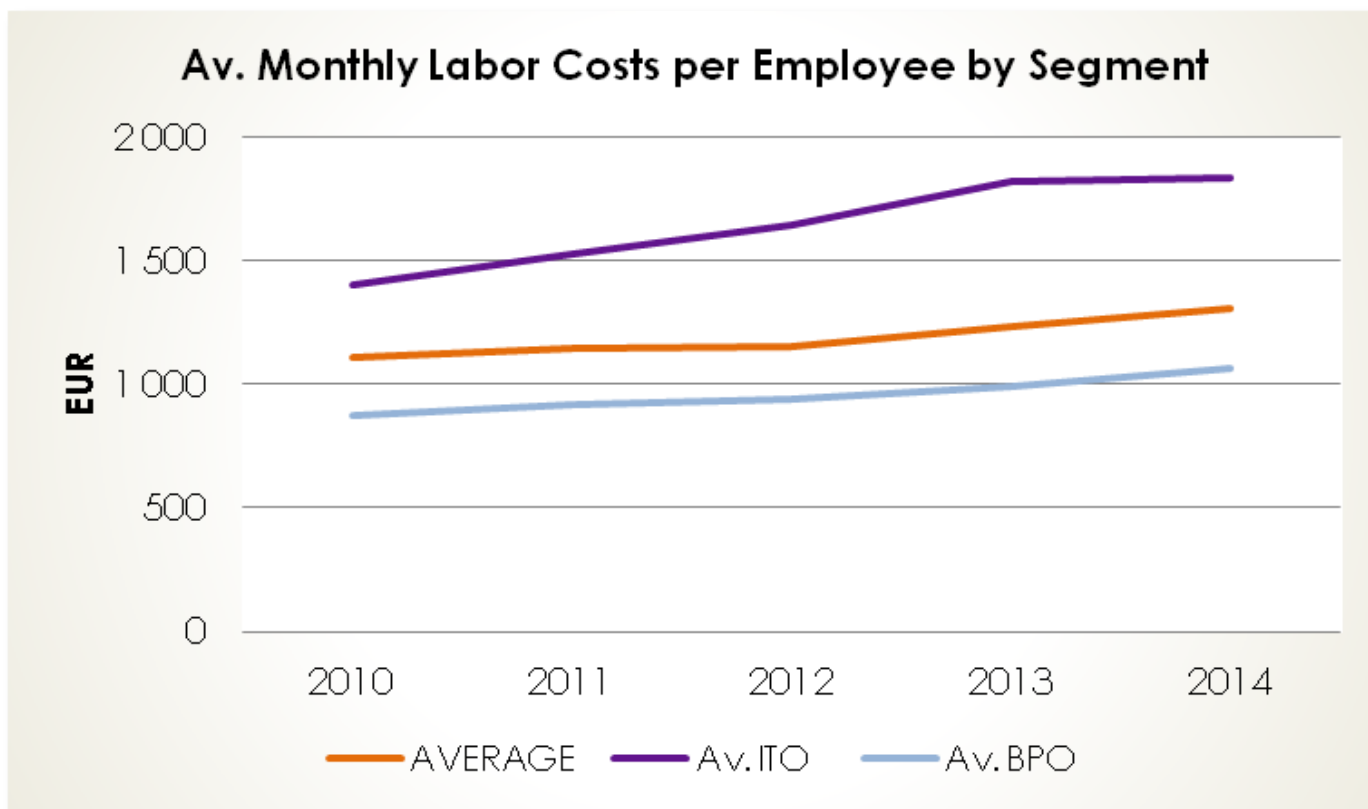
of companies forming the employment in the sector

	2010	2011	2012	2013	2014
• 50% share	12	11	11	12	11
• 80% share	30	31	33	37	38



MONTHLY EMPLOYMENT COSTS

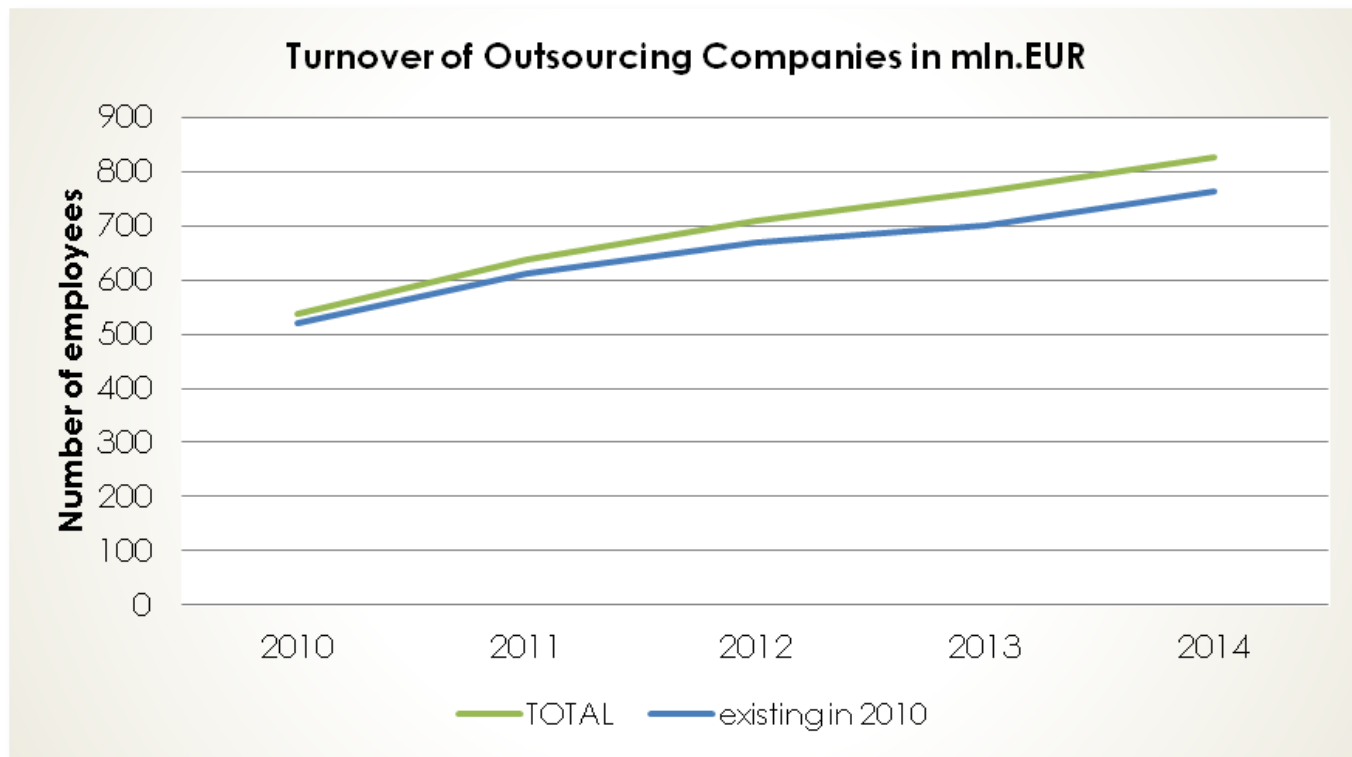
<u>Salaries</u>	<u>EUR 2014 2014 vs 2013</u>		<u>CAGR (2010-14)</u>	
Overall	1,310	+5.9%		+4.3%
BPO: 1,063		+7.3%	+5.5%	
ITO:	1,833	+0.8%	+7.0%	



** sample 95 companies*

INDUSTRY TURNOVER

<u>Turnover</u>	<u>2014</u>	<u>vs 2013</u>	<u>CAGR 2010</u>
Total:	€827 mln	+8.4%	+11.4%
BPO:	€555.8 mln	+10.5%	+16.72%
ITO:	€271 mln	+0.8%	+3.3%



of companies forming outsourcing industry turnover

Share	2010	2014
50%	6	8
80%	29	32

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