WELCOME TO PLOVDIV

Zdravko Dimitrov
Mayor of Plovdiv

As the mayor of Plovdiv, I am proud to introduce the 2020 edition of the “Investment Destination Plovdiv” catalogue.

This may be your first encounter with Plovdiv or you may be update previously known facts about the region. In any case, it is just the first step of a journey that I and my team will join you in.

‣ Plovdiv is the biggest industrial center of Bulgaria with over 74 000 jobs in manufacturing.

‣ Trakia Economic Zone hosts over 200 multinational and local producers.

‣ A local economy with predominant business profile – close to 70% of all value added is created in manufacturing and B2B services.

‣ IT&BPO are the fastest growing sectors - outnumbering 7000 jobs and a 10,6% annual growth of productivity.

‣ City’s pool of talent is steadily expanding - about 34 000 students, positive migration balance, growing expat community.
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LIST OF MULTINATIONAL & LOCAL INDUSTRIAL COMPANIES

EDUCATION
DIVERSE ECOSYSTEM OF HIGH SCHOOLS AND UNIVERSITIES

IT&BPO
FASTEST GROWING SECTOR ATTRACTS GLOBAL TALENT TO THE CITY

PROPERTY MARKET
NETWORK OF WELL DEVELOPED INDUSTRIAL PARKS AND OFFICE CENTERS

PUBLIC SERVICES
FAST IMPROVING UTILITIES INFRASTRUCTURE

QUALITY OF LIFE
AFFORDABLE COST OF LIVING AND RICH POSSIBILITIES FOR SPORTS & LEISURE
KEY FACTS

BULGARIA IS A MEMBER OF:

EUROPEAN UNION
SINCE 2007

ERM II
& HAS A FIXED RATE TO €

EU BANKING UNION
SINCE 2020

NATO
SINCE 2004
KEY FACTS
WHY PLOVDIV?

1. CENTER OF A REGION WITH A POPULATION OF 770,000 AND 18,000 EXPATS
2. HIGH QUALITY OF LIFE AND GREAT WORK-LIFE BALANCE
3. #1 INDUSTRIAL LEADER IN BULGARIA WITH OVER 74,000 JOBS
4. HIGHLY DEVELOPED CLUSTER OF DISCRETE MANUFACTURERS
5. LEADING UNIVERSITY CENTER WITH OVER 34,000 STUDENTS
6. INTERNATIONAL SPOTLIGHT FOR INVESTORS AND DIGITAL NOMADS
7. SECOND BIGGEST IT CENTER WITH SOME 7000 JOBS
8. SINGLE POINT OF CONTACT AND AN ALL-IN SERVICE PACKAGE FOR INVESTORS

AMONG TOP 10 MID-SIZED CITIES WITH BEST FDI STRATEGY AND COST-EFFECTIVENESS

*FDi Intelligence*
Doing Business in Bulgaria

Macroeconomic Numbers

- **Government Debt (as % of GDP)**: 20.4% (2nd lowest in EU)
- **Budget Surplus (as % of GDP)**: 2.1% (3rd highest in EU)
- **Inflation**: 3.1%
- **GDP Change**: 3.4%
- **Employment Rate**: 70.1%
- **Exports**: €38.6 billion
- **Imports**: €36.5 billion
- **Exports and Imports (as % of GDP)**: 124%
- **GDP Change**: 3.4%
- **Budget Surplus (as % of GDP)**: 2.1%
- **Government Debt (as % of GDP)**: 20.4% (2nd lowest in EU)
- **Inflation**: 3.1%

**ERM II**

The last step before accepting the Euro
Bulgaria is expected to join the Eurozone in 2023

**Banking Union**

Helps to create a more transparent, unified and safer market for banks
Allows for the consistent application of EU banking rules

**Fixed Exchange Rate Since 1997**
To stay in place until Bulgaria joins the Eurozone

Governments maintain fiscal policy with low deficits or even surpluses

Source: NSI, BNB, Eurostat, 2019
2.2 DOING BUSINESS IN BULGARIA

INVESTMENT CLIMATE

5% WITHHOLDING TAX ON DIVIDENDS DISTRIBUTED TO NON EU/EEA COMPANIES

10% FLAT CORPORATE & PERSONAL INCOME TAX RATE

34.8% TAXES ON LABOR AS % OF LABOR COSTS

20% VAT

€18 400 MAXIMUM ANNUAL SOCIAL SECURITY BASE

37TH (out of 162) ECONOMIC FREEDOM OF THE WORLD
Fraser Institute, 2019

21ST (out of 190) TRADING ACROSS BORDERS
DB Index 2020, World Bank

49TH (out of 141) GLOBAL COMPETITIVENESS INDEX
World Economic Forum, 2019

Cost of enforcing contacts (% of claim)

18.6% BULGARIA

21.5% OECD high income

26.6% EUROPE & CENTRAL ASIA

Source: Doing Business database, 2020
## INVESTOR INCENTIVES

<table>
<thead>
<tr>
<th>Financial incentives representing regional state aid</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>TAX RELIEF</td>
<td>FINANCIAL SUPPORT FOR CONSTRUCTION OF TECHNICAL INFRASTRUCTURE ELEMENTS (used exclusively by the investor)</td>
</tr>
<tr>
<td>PROVIDING A GRANT OF UP TO 10% OF THE TOTAL INVESTMENT COST</td>
<td>FINANCIAL SUPPORT OF UP TO 25% FOR THE VOCATIONAL TRAINING FOR OBTAINING PROFESSIONAL QUALIFICATIONS</td>
</tr>
<tr>
<td>REIMBURSEMENT OF LABOR COSTS PAID BY THE EMPLOYER FOR A PERIOD OF UP TO 2 YEARS</td>
<td>ACQUIRING OWNERSHIP RIGHTS OR LIMITED OWNERSHIP RIGHTS OVER REAL ESTATE AT A PRICE LOWER THAN THE MARKET (but not lower than the tax assessment)</td>
</tr>
<tr>
<td>INTRODUCING EXEMPTION FROM THE OBLIGATION OF PAYING AN AGRICULTURAL LAND TRANSFORMATION FEE</td>
<td>IMPORTING ASSETS WITHOUT EFFECTIVE PAYMENT OF IMPORT VAT</td>
</tr>
</tbody>
</table>

*Construction of public infrastructure elements, that can also be used by other investors, is not considered a regional state aid*

<table>
<thead>
<tr>
<th>Non-financial incentives</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ADMINISTRATIVE PROCEDURES SHORTENED</td>
<td>INDIVIDUAL ADMINISTRATIVE AND INFORMATION SERVICES</td>
</tr>
<tr>
<td>INTERDEPARTMENTAL TASK FORCE FOR INSTITUTIONAL SUPPORT</td>
<td>ACQUIRING REAL ESTATE WITHOUT TENDER PROCEDURE OR COMPETITIVE BIDDING</td>
</tr>
<tr>
<td></td>
<td>ESTABLISHMENT OF PUBLIC-PRIVATE PARTNERSHIPS WITH MUNICIPALITIES, UNIVERSITIES AND OTHER ORGANIZATIONS</td>
</tr>
</tbody>
</table>
Plovdiv Municipality provides investors a single point of contact & an all-in package of services, including preliminary researches and consultations, staff recruitment support, local media promotion, etc.

For projects with expenditures below €50 million
- 50% of the total investment cost

For projects with expenditures above €50 million
- Maximum aid amount = 50% x (50 + 0.5xB + 0.34xC)
  - B is the part of eligible costs between €50-100 million
  - C is the part of eligible costs above €100 million

Example: OEM with 500 million total investment cost
- Maximum aid amount = 50% x (50 + 0.5x50 + 0.34x400) = €105.5 million

Maximum financial incentives intensities under European Commission regulation

Thresholds for special investment status

<table>
<thead>
<tr>
<th>Priority</th>
<th>Class A</th>
<th>Class B</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>€25.6 million</td>
<td>€5.1 million</td>
</tr>
</tbody>
</table>

Plovdiv Municipality provides investors a single point of contact & an all-in package of services, including preliminary researches and consultations, staff recruitment support, local media promotion, etc.

In the coming years Plovdiv municipality will implement projects making the industrial parks easily accessible & faster, including:

- Modernizing the railway to support high-speed international trains
- Completion of the road, which connects Plovdiv & nearby villages in the Rhodope area
- Completion of the Plovdiv ring road
- Construction of a road underpass under the Plovdiv Railway station
Plovdiv has a well developed business service sector, which provides all the high-quality services a manufacturing company might need.
4.2

LOCAL ECONOMY

INVESTMENTS & PRODUCTIVITY

€4.5 billion GDP

€6700 GDP PER CAPITA

6.6% ANNUAL GROWTH (2010-2018 average)

Rise of productivity is ensured by abundant capital investment

€319 million CUMULATIVE FDI EXPANSION FOR THE LAST 3 YEARS

€953 million FIXED CAPITAL EXPENDITURES IN 2018

Source: NSI (data on district level for 2018)

Industrial space & warehouse construction enhance the rapid development of Plovdiv as a manufacturing leader and logistics hub

430 000 m² (4.6 million ft²) APPROVED FOR NON-HOUSING CONSTRUCTION IN 2019

557 000 m² (6 million ft²) APPROVED FOR HOUSING CONSTRUCTION IN 2019

16.2% OF ALL PERMITS IN THE COUNTRY

13.5% OF ALL PERMITS IN THE COUNTRY

Source: NSI (data on district level for 2019)
5.1 LABOR MARKET

POPULATION

772,000
45 MIN. FROM INDUSTRIAL ZONES

535,000
30 MIN. FROM DOWNTOWN

Plovdiv has the biggest net annual change among the Bulgarian cities, besides the capital.

<table>
<thead>
<tr>
<th>Population by age in wider Plovdiv (distance 45 min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 20</td>
</tr>
<tr>
<td>----------</td>
</tr>
<tr>
<td>151,000</td>
</tr>
</tbody>
</table>

7500 NEW INHABITANTS (city)

1800 NET ANNUAL CHANGE (city)

6.3% NET MIGRATION 10-29 YEARS (district)

17,900 EXPATS (residing in the district for more than 3 months)

3300 INTERNATIONAL STUDENTS

Source: Data from universities, Ministry of interior, NSI, 2019
5.2 LABOR MARKET

WORKFORCE

More than any other region in the country

+17 900 WORKFORCE GROWTH SINCE 2010

70.3% (15-64 years) EMPLOYMENT RATE (EU average: 68.5%)

Source: NSI (data on district level), Eurostat, 2019

Local economy structure (by number of jobs)

Plovdiv is the region with most people working in manufacturing companies in Bulgaria

221 800 payroll jobs

IT, BPO & B2B 49 800
Consumer services 36 400
Construction 11 400
Others 6 300
Public services & regulated markets 43 200

Manufacturing 74 700

53 600 PART-TIME EMPLOYEES
38 200 FREELANCERS & FAMILY WORKERS
313 600 TOTAL EMPLOYMENT

Industrial labor pool in closest districts

<table>
<thead>
<tr>
<th>District</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stara Zagora</td>
<td>35 900</td>
</tr>
<tr>
<td>Pazardzhik</td>
<td>21 400</td>
</tr>
<tr>
<td>Haskovo</td>
<td>14 900</td>
</tr>
</tbody>
</table>

Source: NSI (data on district level for 2018)
6.1 MANUFACTURING

INDUSTRY SNAPSHOT

Discrete manufacturing as % of manufacturing employment

The foreign capital inflows are shifting from mass production to a “leaner” and in some cases craft custom and small series productions.

Change in number of jobs for the past 8 years

<table>
<thead>
<tr>
<th></th>
<th>Discrete manufacturing</th>
<th>Other manufacturing</th>
<th>Non-manufacturing sectors</th>
</tr>
</thead>
<tbody>
<tr>
<td>+10 300</td>
<td>-1000</td>
<td>+4100</td>
<td></td>
</tr>
</tbody>
</table>

Discrete manufacturing

Volume

<table>
<thead>
<tr>
<th>FIXED-CAPITAL EXPENDITURES</th>
<th>VALUE</th>
<th>SHARE IN LOCAL MANUFACTURING</th>
<th>SHARE IN DISCRETE MANUFACTURING AT NATIONAL LEVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td>€132.8 billion</td>
<td>42.9%</td>
<td>16.2%</td>
<td></td>
</tr>
</tbody>
</table>

OUTPUT

<table>
<thead>
<tr>
<th>OUTPUT</th>
<th>VALUE</th>
<th>SHARE IN LOCAL MANUFACTURING</th>
<th>SHARE IN DISCRETE MANUFACTURING AT NATIONAL LEVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td>€1.9 billion</td>
<td>40.1%</td>
<td>17.6%</td>
<td></td>
</tr>
</tbody>
</table>

NUMBER OF JOBS

<table>
<thead>
<tr>
<th>NUMBER OF JOBS</th>
<th>VALUE</th>
<th>SHARE IN LOCAL MANUFACTURING</th>
<th>SHARE IN DISCRETE MANUFACTURING AT NATIONAL LEVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td>35.4 thousand</td>
<td>47.4%</td>
<td>15.7%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Trakia Economic Zone with NSI and Eurostat data for 2010-2018
Plovdiv district has a well-developed ecosystem of discrete manufacturing such as machine-building, automotive, home appliances, electronics, medical equipment, etc.

**Discrete manufacturing**
- 35,400 jobs

**Turnover**
- €5.2 billion

**Output**
- €4.8 billion

**Number of jobs**
- 74,700

**Source:** Trakia Economic Zone based on NSI (data on district level for 2018)

Plovdiv is #1 industrial center in Bulgaria

The local economy advances in its development through investments in discrete manufacturing & creation of more productive jobs

**Manufacturing**

<table>
<thead>
<tr>
<th>VOLUME</th>
<th>Turnover</th>
<th>Output</th>
<th>Number of jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHARE IN LOCAL ECONOMY</td>
<td>€5.2 billion</td>
<td>€4.8 billion</td>
<td>74,700</td>
</tr>
<tr>
<td>SHARE IN LOCAL ECONOMY</td>
<td>36.3%</td>
<td>54.9%</td>
<td>33.7%</td>
</tr>
</tbody>
</table>

**Source:** NSI (data on district level for 2018)
## MANUFACTURING WAGES

### Wages in manufacturing in Plovdiv, €/Month (2021 forecast)

<table>
<thead>
<tr>
<th>ENTRY LEVEL</th>
<th>JOB POSITION</th>
<th>SKILLED WORKERS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total labor cost</td>
<td>Gross wages</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>630</td>
<td>530</td>
</tr>
<tr>
<td></td>
<td>714</td>
<td>600</td>
</tr>
<tr>
<td></td>
<td>844</td>
<td>710</td>
</tr>
<tr>
<td></td>
<td>892</td>
<td>750</td>
</tr>
<tr>
<td></td>
<td>999</td>
<td>840</td>
</tr>
<tr>
<td></td>
<td>951</td>
<td>800</td>
</tr>
<tr>
<td></td>
<td>951</td>
<td>800</td>
</tr>
</tbody>
</table>

Total labor costs include gross wages plus 18.9% mandatory social security contributions paid by the employer.

Source: Trakia Economic Zone based on survey of net pay among employers.

### Competitive salaries create opportunities for attracting and qualifying workers from other sectors of the local economy

<table>
<thead>
<tr>
<th>Other manufacturing industries</th>
<th>Non-manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>86.1</td>
<td>88.9</td>
</tr>
</tbody>
</table>

Source: NSI (data on district level for 2018)
EDUCATION & INDUSTRY BOARD

Industry partners in the 2020/2021 program for career orientation & motivation of primary school children

Join the board in 2020/2021: ei-board.org
## MAJOR INVESTORS
### PLOVDIV DISTRICT

**Automotive, machinery & electronics**

<table>
<thead>
<tr>
<th>ABB Bulgaria</th>
<th>ITW Ispracontrols Bulgaria</th>
<th>Milara International</th>
<th>Televic Bulgaria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aiger Engineering</td>
<td>Kittner</td>
<td>Minipulse</td>
<td>Techno Aktas</td>
</tr>
<tr>
<td>Andi BG</td>
<td>Latecoere</td>
<td>Odelo Farba</td>
<td>Tomika - Metal</td>
</tr>
<tr>
<td>Ataro Klima</td>
<td>Leader 96</td>
<td>Osram</td>
<td>Viking Life Saving Equipment</td>
</tr>
<tr>
<td>Balkancar Record</td>
<td>Liebherr Hausgeratte Maritsa</td>
<td>Schneider Electric</td>
<td>Watts Industries</td>
</tr>
<tr>
<td>Biomashinostroene</td>
<td>Liebherr Transportation Systems</td>
<td>Sensata Technologies</td>
<td>William Hughes</td>
</tr>
<tr>
<td>BTL Industries</td>
<td>LMP Bulgaria</td>
<td>SKF Bearings</td>
<td>Willi Elbe</td>
</tr>
<tr>
<td>Hannon Systems</td>
<td>Maxcom</td>
<td>Steca Elektronic</td>
<td>Wurth Elektronik</td>
</tr>
<tr>
<td>Index - 6</td>
<td>Mecalit Bulgaria</td>
<td>Spinner Bulgaria</td>
<td>etc.</td>
</tr>
</tbody>
</table>

**Industry suppliers**

<table>
<thead>
<tr>
<th>Angel Stoilov - 96</th>
<th>Dunapack Rodina</th>
<th>Kalcit</th>
<th>Profilink</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asel</td>
<td>Fort</td>
<td>Kam 99</td>
<td>Roza Email</td>
</tr>
<tr>
<td>Assenova Krepost</td>
<td>Gotmar</td>
<td>Kaskada</td>
<td>Schatti Bulgaria</td>
</tr>
<tr>
<td>BA Glass Bulgaria</td>
<td>Gudex</td>
<td>KCM</td>
<td>Stratus</td>
</tr>
<tr>
<td>Bulltek</td>
<td>HIK-91</td>
<td>Moni Stamboliiski</td>
<td>Technomontage</td>
</tr>
<tr>
<td>Cast Futura</td>
<td>HMC</td>
<td>Moni MG</td>
<td>Tempodem</td>
</tr>
<tr>
<td>Chugunoleene - Parvomay</td>
<td>Hus</td>
<td>Pentax Medical Bulgaria</td>
<td>Yuriy Gagarin</td>
</tr>
<tr>
<td>Complex Industrial Service</td>
<td>Intrama</td>
<td>Philcab</td>
<td>ZBE</td>
</tr>
<tr>
<td>Diko</td>
<td>ITD</td>
<td>Poligroup</td>
<td>etc.</td>
</tr>
</tbody>
</table>

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### Closest Regions to Plovdiv (less than 100 km)

#### Automotive, machinery & electronics

<table>
<thead>
<tr>
<th>Company</th>
<th>Company</th>
<th>Company</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ariete</td>
<td>Caproni</td>
<td>Micro View Endoscopy</td>
<td>Standard Profile</td>
</tr>
<tr>
<td>Arkomat</td>
<td>Donido Machine Industry</td>
<td>MM Mechanics</td>
<td>Stimex</td>
</tr>
<tr>
<td>Autoelectric Bulgaria</td>
<td>Ectron</td>
<td>M+S Hydraulics</td>
<td>Varroc Lighting Systems</td>
</tr>
<tr>
<td>Badeshtnost</td>
<td>Elhim Iskra</td>
<td>Oskar Ruegg Bulgaria</td>
<td>Veas Bulgaria</td>
</tr>
<tr>
<td>Bonner</td>
<td>Hraninvest-Hranmashkomplekt</td>
<td>Pim</td>
<td>Videoton Bulgarian Holdings</td>
</tr>
<tr>
<td>BRB-Engineering</td>
<td>Kolowag</td>
<td>Rais</td>
<td>Yazaki Bulgaria</td>
</tr>
<tr>
<td>Bultech - 2011</td>
<td>Kostal</td>
<td>Rodina Haskovo</td>
<td>Zavod za Optika</td>
</tr>
<tr>
<td>Bunay</td>
<td>Micro Optics Europe</td>
<td>Scholly Optics</td>
<td>etc.</td>
</tr>
</tbody>
</table>

#### Industry suppliers

<table>
<thead>
<tr>
<th>Company</th>
<th>Company</th>
<th>Company</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asarel Medet</td>
<td>Guala Closures</td>
<td>MM Mechanics</td>
<td>Superabrasive</td>
</tr>
<tr>
<td>Astroida</td>
<td>Kauchuk</td>
<td>Panchim</td>
<td>Technoengineering</td>
</tr>
<tr>
<td>Ate Plast</td>
<td>Kolovag</td>
<td>PFB Preso Fondal</td>
<td>Tron</td>
</tr>
<tr>
<td>Bulhart</td>
<td>Matrix Pack</td>
<td>Preskov</td>
<td>VMZ</td>
</tr>
<tr>
<td>DS Smith</td>
<td>Metallic</td>
<td>Progress</td>
<td>Zavod za Pruzhini</td>
</tr>
<tr>
<td>Ecoinvest</td>
<td>Metalica</td>
<td>Promet Safe</td>
<td>etc.</td>
</tr>
</tbody>
</table>

Beside a well developed cluster of automotive and machine building companies, as well as their suppliers, Plovdiv hosts some of the biggest food & beverages producers in Bulgaria including Kamenitza, OMK, VP Brands, Nova Trade, Simid, Dimitar Madzharov, etc.
In the school year 2019/2020, in Plovdiv there were 24 dual education classes, financed by 31 companies.

<table>
<thead>
<tr>
<th>High Schools</th>
<th>Vocational Training Centers</th>
<th>Students in High Schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>29 Vocational High Schools</td>
<td>78 Vocational Training Centers</td>
<td>23,300 Students in High Schools of which 9,800 in STEM fields</td>
</tr>
</tbody>
</table>

Source: Regional Department of Education, MoE, NAVET (data on district level for 2019/2020)

<table>
<thead>
<tr>
<th>Graduates</th>
<th>Vocational High School Graduates</th>
</tr>
</thead>
<tbody>
<tr>
<td>2200</td>
<td>2300 General High School Graduates</td>
</tr>
<tr>
<td>7400</td>
<td>7</td>
</tr>
</tbody>
</table>

Source: NSI (data on district level for 2019)
### Top 5 biggest universities in Plovdiv

<table>
<thead>
<tr>
<th>University</th>
<th>Number of students</th>
<th>Major fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLOVDIV UNIVERSITY</td>
<td>14 300</td>
<td>Business services; Language studies; Information technology &amp; computer science</td>
</tr>
<tr>
<td>MEDICAL UNIVERSITY OF PLOVDIV</td>
<td>6400</td>
<td>Medicine; Dental medicine; Healthcare</td>
</tr>
<tr>
<td>AGRICULTURAL UNIVERSITY OF PLOVDIV</td>
<td>3300</td>
<td>Agronomy; Plant protection</td>
</tr>
<tr>
<td>UNIVERSITY OF FOOD TECHNOLOGIES</td>
<td>3300</td>
<td>Food &amp; beverages technologies; Machine building</td>
</tr>
<tr>
<td>TECHNICAL UNIVERSITY OF SOFIA - BRANCH PLOVDIV</td>
<td>2100</td>
<td>Electronics &amp; automation; Mechanical engineering</td>
</tr>
</tbody>
</table>

Source: Data from universities for 2019/2020

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### Students enrolled in technical studies

<table>
<thead>
<tr>
<th>Field</th>
<th>Number of students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information Technologies</td>
<td>1920</td>
</tr>
<tr>
<td>Communication &amp; Computer Technologies</td>
<td>1090</td>
</tr>
<tr>
<td>Mechanical Engineering</td>
<td>930</td>
</tr>
<tr>
<td>Electrical Engineering, Electronics &amp; Automation</td>
<td>630</td>
</tr>
<tr>
<td>General Engineering</td>
<td>520</td>
</tr>
<tr>
<td>Energy Studies</td>
<td>230</td>
</tr>
<tr>
<td>Transport, Navigation &amp; Aviation</td>
<td>220</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>5540</strong></td>
</tr>
</tbody>
</table>

---

*A huge boost for the higher education will be the Center for plant systems biology and biotechnology that is currently being built and is worth over €15 million*
9.1 IT&BPO INDUSTRY ZOOM

A rapidly developing destination for international shared service centers, IT companies & customer support centers

+10.6% PRODUCTIVITY
+3.6% EMPLOYMENT
+15.8% VALUE ADDED
+12.6% TURNOVER

*Average annual change for 2010-2018
Source: NSI (data on district level)

Employment in IT&BPO & related business services

<table>
<thead>
<tr>
<th>Outsourcing &amp; other administrative</th>
<th>7300</th>
</tr>
</thead>
<tbody>
<tr>
<td>Law, accounting &amp; other consulting</td>
<td>5400</td>
</tr>
<tr>
<td>IT &amp; telecom</td>
<td>4400</td>
</tr>
<tr>
<td>Finance &amp; insurance</td>
<td>2100</td>
</tr>
</tbody>
</table>

Number of jobs in IT&telecom more than doubled for an 8-year period

Source: NSI (data on district level for 2018)

University students in IT&BPO related fields

<table>
<thead>
<tr>
<th>Finance, accounting &amp; legal</th>
<th>Computer science</th>
<th>Business management &amp; administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>4000</td>
<td>3000</td>
<td>2400</td>
</tr>
</tbody>
</table>

Students suitable for accounts payable/receivable, legal compliance reporting, payroll, procurement & other financial services

Source: Data from universities for 2019/2020
## ATTRACTION GLOBAL TALENT

*Over 17 900 foreigners residing* in the district for more than 3 months

<table>
<thead>
<tr>
<th>EU citizens</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UP TO 5 YEARS</strong></td>
</tr>
<tr>
<td><strong>PERMANENT RESIDENCE</strong></td>
</tr>
<tr>
<td><strong>TRANSFERABLE</strong></td>
</tr>
<tr>
<td><strong>NO RESTRICTRIONS</strong></td>
</tr>
<tr>
<td><strong>NATIONAL DRIVER’S LICENSE</strong></td>
</tr>
</tbody>
</table>

Residents of over *130 different nations live & work from Plovdiv*

<table>
<thead>
<tr>
<th>Non-EU residents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EU BLUE CARD</strong></td>
</tr>
<tr>
<td><strong>UP TO 4 YEARS</strong></td>
</tr>
<tr>
<td><strong>€85</strong></td>
</tr>
<tr>
<td><strong>LLC NEEDED</strong></td>
</tr>
<tr>
<td><strong>1 YEAR</strong></td>
</tr>
</tbody>
</table>

Source: Trakia Economic Zone, Foreigners in Republic of Bulgaria Act, insurance companies, europa.eu
### IT&BPO ECOSYSTEM

#### Over 100 IT&BPO companies

<table>
<thead>
<tr>
<th>Category</th>
<th>Companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>60K</td>
<td>DNH Soft, OptiCentre, Speed</td>
</tr>
<tr>
<td>A Data Pro</td>
<td>Elders, Orak Engineering, Speedflow Communications</td>
</tr>
<tr>
<td>ABB SSC</td>
<td>Enigma Software Group, ORM.Bg, SQA Services</td>
</tr>
<tr>
<td>Accenture</td>
<td>Evolink, Outcons, Stedo</td>
</tr>
<tr>
<td>Adastra</td>
<td>Football Radar, Plutus BG, Strypes</td>
</tr>
<tr>
<td>Amexis</td>
<td>Hemisphere Commerce, Podix, Sutherland Global Services</td>
</tr>
<tr>
<td>APT Systems</td>
<td>Hosting Solutions, Prime Holding, TechHudle</td>
</tr>
<tr>
<td>Arcade Retail</td>
<td>ICYGEN, Programista, Technologica</td>
</tr>
<tr>
<td>BGO Software</td>
<td>IKOM, Proxiad, Tellus International</td>
</tr>
<tr>
<td>BPO Bulgaria</td>
<td>Infinite Lambda, Real Time Games Development, Trio Interactive International</td>
</tr>
<tr>
<td>Broadcom Bulgaria</td>
<td>Intech Group, Retail Direct, TSD Services</td>
</tr>
<tr>
<td>BS Technologies</td>
<td>InterConsult Bulgaria, Reward Gateway, TTEC Eastern Europe</td>
</tr>
<tr>
<td>Bulanet</td>
<td>IT Academy, Risco Group, Uniqa Software Services</td>
</tr>
<tr>
<td>Bulpros</td>
<td>Kodar, SBTech Global Limited, Vertinity Ltd.</td>
</tr>
<tr>
<td>Cloudtech</td>
<td>m+w Media Networks, ScaleFocus, Viking Lifesaving Equipment GBS</td>
</tr>
<tr>
<td>Code nest</td>
<td>Media IT Services, Seeburger, Viscomp</td>
</tr>
<tr>
<td>ConsultCommerce</td>
<td>MentorMate, SetMatic, Visrez</td>
</tr>
<tr>
<td>CRA Services</td>
<td>Modis Bulgaria, SIBIZ, VSG Bulgaria</td>
</tr>
<tr>
<td>DATA+</td>
<td>Niset, SIS Technology, Westernacher Consulting</td>
</tr>
<tr>
<td>Delta Source</td>
<td>Novarto, SiteGround, etc.</td>
</tr>
</tbody>
</table>
### 10.1 Property Market: Office Space

#### IT&BPO Companies

*are a major driver of the office market*

- Source: Trakia Economic Zone

#### Monthly Rents

<table>
<thead>
<tr>
<th>Location</th>
<th>Class A (€/m²/month)</th>
<th>Class B (€/m²/month)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plovdiv / Bulgaria</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Bratislava / Slovakia</td>
<td>16</td>
<td>10</td>
</tr>
<tr>
<td>Sofia / Bulgaria</td>
<td>16</td>
<td>14</td>
</tr>
<tr>
<td>Bucharest / Romania</td>
<td>18</td>
<td>14</td>
</tr>
<tr>
<td>Prague / Czechia</td>
<td>23</td>
<td>16</td>
</tr>
<tr>
<td>Budapest / Hungary</td>
<td>24</td>
<td>16</td>
</tr>
<tr>
<td>Warsaw / Poland</td>
<td>26</td>
<td>21</td>
</tr>
<tr>
<td>Berlin / Germany</td>
<td>40</td>
<td>31</td>
</tr>
</tbody>
</table>

- Source: Colliers, H2 2019

#### Major Office Centers

- **BUSINESS CENTRE ANGELOV**
  - [businesscentreangelov.com](http://businesscentreangelov.com)
- **PIMK OFFICE CENTER**
  - [pimkbuild.bg](http://pimkbuild.bg)
- **CAPITAL CITY CENTER**
  - [capitalcitycenter.bg](http://capitalcitycenter.bg)
- **PLOVDIV PLAZA**
  - [plovidivplaza.bg](http://plovidivplaza.bg)
- **CAPITAL TRADE CENTER**
  - [capitaltradecenter.bg](http://capitaltradecenter.bg)
- **REGUS**
  - [regus.bg](http://regus.bg)
- **KAMENITZA OFFICE PARK**
  - [kamenitzapark.bg](http://kamenitzapark.bg)
- **RILON CENTER**
  - [rilon-center.business.site](http://rilon-center.business.site)
- **OFFICE PARK PLOVDIV**
  - [officeparkplovdiv.com](http://officeparkplovdiv.com)
- **ROYAL CITY BUSINESS PARK**
  - [galaxy-bg.com](http://galaxy-bg.com)

#### Major Co-working Places

- **CAT & MOUSE COWORKING**
  - [catandmouse.bg](http://catandmouse.bg)
- **JI4KA**
  - [ji4ka.com](http://ji4ka.com)
- **COLORKING**
  - [colorking.com](http://colorking.com)
- **REGUS**
  - [regus.bg](http://regus.bg)
## 10.2 PROPERTY MARKET

### INDUSTRIAL ZONES

#### Rents of warehouse space

<table>
<thead>
<tr>
<th>Location</th>
<th>€/sq. m./month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plovdiv / Bulgaria</td>
<td>4.0</td>
</tr>
<tr>
<td>Bucharest / Romania</td>
<td>4.2</td>
</tr>
<tr>
<td>Sofia / Bulgaria</td>
<td>4.7</td>
</tr>
<tr>
<td>Bratislava / Slovakia</td>
<td>4.7</td>
</tr>
<tr>
<td>Prague / Czechia</td>
<td>4.8</td>
</tr>
<tr>
<td>Warsaw / Poland</td>
<td>4.9</td>
</tr>
<tr>
<td>Budapest / Hungary</td>
<td>5.0</td>
</tr>
<tr>
<td>Berlin / Germany</td>
<td>8.3</td>
</tr>
</tbody>
</table>

Source: Colliers, H2 2019

#### Price of land for industrial use

- **25-40 €/m²**

#### Worth of investment

- Over €2 billion

**Industrial & tech parks**

1. MARITZA INDUSTRIAL ZONE  
   [tez.bg](http://tez.bg)
2. AGRO CENTER KALOYANOVO  
   [tez.bg](http://tez.bg)
3. RAKOVSKI INDUSTRIAL ZONE  
   [tez.bg](http://tez.bg)
4. HIGH-TECH PARK INNOVATIONS  
   [tez.bg](http://tez.bg)
5. INDUSTRIAL PARK PLOVDIV  
   [tez.bg](http://tez.bg)
6. KUKLEN INDUSTRIAL ZONE  
   [tez.bg](http://tez.bg)
7. LOGISTIC INDUSTRIAL PARK RODOPI  
   [lip-rodopi.com](http://lip-rodopi.com)
8. INDUSTRIAL PARK MARKOVO  
   [industrialparkmarkovo.com](http://industrialparkmarkovo.com)

**Worth of investment**

- Over €2 billion

**CITY OF PLOVDIV**

- Burgas Port: 262 km
- Sofia Airport: 131 km
- Istanbul: 419 km

**Intermodal Terminal**

**Plovdiv Airport**

---

2700 acres

LAND FOR INDUSTRIAL USE

---

25-40 €/m²

PRICE OF LAND FOR INDUSTRIAL USE

---

Worth of investment

Over €2 billion
TRAHIA ECONOMIC ZONE
ECO INDUSTRIAL PARK

GREEN INFRASTRUCTURE & SERVICES

Renewable Energy
Water & Waste Management
Smart Buildings Construction
Electric Transport
Data Center

ECO SMART FACTORIES

- Efficient
- Competitive
- Sustainable

Knowledge Process Outsourcing
Industrial Internet of Things
Prototyping & 3D Printing
Data Science Services

TECHNOLOGY ECOSYSTEM

Applied Research Center • Universities
StartUp Accelerators • Tech Vendors
**11.1 PUBLIC SERVICES**

**ACCESS TO UTILITIES**

### Electricity

<table>
<thead>
<tr>
<th>Annual consumption in mWh, up to</th>
<th>20</th>
<th>500</th>
<th>2000</th>
<th>20 000</th>
<th>70 000</th>
<th>150 000</th>
<th>150 000+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Final price, incl. VAT, EUR/kWh</td>
<td>0.125</td>
<td>0.114</td>
<td>0.104</td>
<td>0.099</td>
<td>0.093</td>
<td>0.082</td>
<td>0.079</td>
</tr>
</tbody>
</table>

Source: NSI, H2 2019

*Industrial users benefit from the expanding liberalized market of electricity*

### Natural gas

<table>
<thead>
<tr>
<th>Annual consumption in GJ</th>
<th>1000</th>
<th>10 000</th>
<th>100 000</th>
<th>1 000 000</th>
<th>4 000 000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Final price, incl. VAT, EUR/GJ</td>
<td>12.646</td>
<td>11.599</td>
<td>10.147</td>
<td>8.571</td>
<td>7.946</td>
</tr>
</tbody>
</table>

Source: NSI, H2 2019

*Plovdiv is on the route of both an international and a national transit gas pipeline*

### Water and sewage

<table>
<thead>
<tr>
<th>Level of contamination</th>
<th>I</th>
<th>II</th>
<th>III</th>
</tr>
</thead>
<tbody>
<tr>
<td>Final price, incl. VAT, EUR/m3</td>
<td>1.190</td>
<td>1.350</td>
<td>1.510</td>
</tr>
</tbody>
</table>

Source: Water&Sewage Plovdiv, 2020

*In 2020-2021 projects worth over €100 million will be implemented in wider Plovdiv for reconstruction and rehabilitation of the water supply grid and waste-water collector.*
### Local Taxes & Fees

**Plovdiv city** | **Industrial zones**
---|---
Property tax | 0.18% | 0.15%-0.26%
Waste fee | per quantity or 0.53% | per quantity

*Source: Municipalities Plovdiv, Maritza, Rakovski and Kuklen, 2020*

#### Example calculation

**NEW INDUSTRIAL PLANT**
in Maritza industrial zone with
4500 m² (48 500 ft²) built up area &
€1 450 000 tax valuation

- **€2175** PROPERTY TAX
- **€2900** WASTE FEE

When choosing to pay according to quantities of waste, the company pays annually another 0.2% on the property tax base

- **€27** PER CONTAINER PER COLLECTION
  - Bigger containers (1100 liters / 290 US gallons)
- **€6** PER CONTAINER PER COLLECTION
  - Smaller containers (240 liters / 63 US gallons)

*Source: Maritza Municipality, 2020*
QUALITY OF LIFE

SPORTS & RECREATION

16 STADIUMS & MULTI-SPORT CENTERS
65 SPORT HALLS & FIELDS
40+ SPORT EVENTS & COMPETITIONS
132 SPORT CLUBS

300 SUNNY DAYS
52 km BIKE LANES
2200 m REGATTA VENUE

2190 acres PUBLIC GREEN SPACES
3 HILLS FOR HIKING IN THE CITY CENTER
76 PARKS & GARDENS

Average | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec
---|---|---|---|---|---|---|---|---|---|---|---|---
Low in °C | 0 | 1 | 3 | 8 | 12 | 15 | 17 | 17 | 14 | 10 | 5 | 1
High in °C | 8 | 9 | 13 | 19 | 24 | 27 | 30 | 30 | 26 | 21 | 15 | 9

Low in °F | 32 | 34 | 37 | 46 | 54 | 59 | 63 | 63 | 57 | 50 | 41 | 34
High in °F | 46 | 48 | 55 | 66 | 75 | 81 | 86 | 86 | 79 | 70 | 59 | 48

Source: Plovdiv Municipality

Source: meteoblue.com
QUALITY OF LIFE

CHILDCARE & MEDICAL SERVICES

12.2

59 KINDERGARTENS

2 MUNICIPAL KIDS & YOUTH CENTERS

1 INTERNATIONAL SCHOOL
(providing Cambridge primary curriculum & IB diploma programme)

49 SCHOOLS PROVIDING PRIMARY EDUCATION

2 COMMUNITY CENTERS FOR KIDS WITH SPECIAL NEEDS

All public schools have successfully integrated the cloud-based services of G Suite for Education and Office 365

Source: Plovdiv Municipality

The city has well-developed medical services with a high density of specialists

<table>
<thead>
<tr>
<th></th>
<th>Per 10 000 inhabitants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctors</td>
<td>Dentists</td>
</tr>
<tr>
<td>82</td>
<td>23</td>
</tr>
</tbody>
</table>

23 HOSPITALS

174 CLINICS & OTHER HEALTH CARE FACILITIES

€160 PER YEAR VOLUNTARY PRIVATE HEALTH INSURANCE

Source: NSI (data on municipality level for 2019), insurance companies

New projects worth over €9 million are currently being implemented in the city of Plovdiv for the construction and renovation of schools, kindergartens and nurseries (over BGN 18 million).
INDUSTRY 4.0
RECOVERY THROUGH TRANSFORMATION

21 OCTOBER
GRAND HOTEL PLOVDIV
Capital.bg
## QUALITY OF LIFE

### COST OF LIVING

<table>
<thead>
<tr>
<th>Typical prices in Plovdiv for everyday things</th>
<th>Cost of living in selected European cities vs. Plovdiv</th>
</tr>
</thead>
<tbody>
<tr>
<td>LUNCH MENU</td>
<td>+17% BUCHAREST</td>
</tr>
<tr>
<td>€5.10</td>
<td></td>
</tr>
<tr>
<td>CAPPUCCINO</td>
<td>+54% PRAGUE</td>
</tr>
<tr>
<td>€1.30</td>
<td></td>
</tr>
<tr>
<td>DOMESTIC BEER</td>
<td>+55% BRATISLAVA</td>
</tr>
<tr>
<td>€1.20</td>
<td></td>
</tr>
<tr>
<td>PUBLIC TRANSPORT (one-way ticket)</td>
<td></td>
</tr>
<tr>
<td>€0.51</td>
<td></td>
</tr>
<tr>
<td>TAXI JOURNEY OF 5 km (3 miles)</td>
<td></td>
</tr>
<tr>
<td>€2.70</td>
<td></td>
</tr>
<tr>
<td>PARKING IN CITY CENTER (per hour)</td>
<td></td>
</tr>
<tr>
<td>€1</td>
<td></td>
</tr>
<tr>
<td>GYM MEMBERSHIP (monthly fee)</td>
<td>+115% BERLIN</td>
</tr>
<tr>
<td>€24.90</td>
<td></td>
</tr>
<tr>
<td>CINEMA TICKET</td>
<td></td>
</tr>
<tr>
<td>€6.10</td>
<td></td>
</tr>
<tr>
<td>PRIVATE KINDERGARTEN (per month)</td>
<td></td>
</tr>
<tr>
<td>€231</td>
<td></td>
</tr>
<tr>
<td>1-BEDROOM APPARTMENT IN CITY CENTER (rent perm month)</td>
<td>+115% BERLIN</td>
</tr>
<tr>
<td>€255</td>
<td></td>
</tr>
<tr>
<td>AVERAGE BASIC UTILITIES</td>
<td></td>
</tr>
<tr>
<td>€88</td>
<td></td>
</tr>
<tr>
<td>INTERNET (1 Gbps connection)</td>
<td></td>
</tr>
<tr>
<td>€12</td>
<td></td>
</tr>
</tbody>
</table>

Source: Numbeo, 2020
12 best things to do in Plovdiv

- Visit the Old Town, which is part of the UNESCO World Heritage tentative list
- See the sunset over the city at the archeological complex Nebet tepe
- Enjoy the rich Roman heritage, with the well-preserved Roman stadium, built in the II century
- Watch a live concert at one of the world's best-preserved Ancient theatres
- Feel the Plovdiv vibe in the creative-industry district Kapana (the Trap)
- Watch the light & water show at the Singing Fountains, situated in Tsar Simeon’s garden
- Visit a sports championship at the multi-sport complex Regatta venue
- Visit the well preserved multicolour mosaic at the Small Basilica
- Take a walk on the „main street“ - the longest pedestrian street in Europe
- Join the Free Walking Tour - a free sightseeing tour in English
- Take a photo at the Plovdiv Together monument
- Walk along Maritsa river in the heart of the city
500+ CULTURAL EVENTS
3 OPEN AIR THEATRES
6 CINEMAS (with 25 screens)
50+ MUSEUMS & GALLERIES
2 5* HOTELS
13 4* HOTELS
700+ CULTURAL SIGHTS
121 500 FOREIGN TOURISTS IN 2019 (in hotels with 10+ beds)
+28% RISE OF FOREIGN TOURISTS SINCE 2015

Source: NSI, Plovdiv Municipality, Ministry of Tourism, Trakia Economic Zone

Places to visit around Plovdiv

BOROVETS SKI RESORT
situated on the northern slopes of Rila mountain

HISSAR SPA RESORT
with 22 hot mineral springs & rich archaeological heritage

PAMPOROVO SKI RESORT
modern network of ski runs, lifts, hotels & restaurants

ROSE VALLEY
home of the exquisite & rare Bulgarian rose oil

NESSEBAR SEASIDE RESORT
UNESCO World Heritage site

GREEK SEASIDE
beautiful beaches at the Aegean Sea

ISTANBUL
the city on two continents
Main events

CONCERTS

- Balabanov’s House Music Days  June-July
- Opera Open  June-September
- Free Outdoor Classical & Jazz Concerts  July-August
- Austrian Music Weeks  September
- Bulgarian Folklore Festival  September
- Polinero Rock Fest  September
- Wrong Fest Music Festival  September
- Hills of Rock  July 2021

EDUCATION & TECHNOLOGY

- Plovdiv Game Jam  January
- International Poetry Festival “Orpheus”  September
- International Technical Fair  September
- Literary festival “Plovdiv Reads”  September-October
- Annual Business Forum “Industry 4.0”  October
- Career Days “IT, Communications & Outsourcing”  October
- European Forum on Social Entrepreneurship  October
- European Literature Night  October

MOVIE & THEATER

- One Dance Week  May-June
- Car Cinema Under the Stars  June
- “Black Box” Contemporary Dance Festival  July
- Filippopolis Film Nights Festival  July
- Summer Cinema in the Park  July
- Free Puppet Theater Performances  July/August
- Include in the Neighbourhood - Theater in the Park  July/August
- Façade Video Festival  September
- Theatre Festival “Scene at Crossroads”  September
- Bulgarian Documentary and Animated Film Festival “Golden Rhyton”  December

SPONSORS

visitplovdiv.com | plovdiv2019.eu

SPORTS

- Cycling Tour  July
- Open Chess Championship  July
- Rowing competitions  July-October
- State Triathlon Championship  August
- Swimming Tournament Madost  September/November
- Plovdiv Cup Aerobic  October
- Sport Fishing Tournament  October
- Marathon Plovdiv  November

CRAFTS & EXHIBITIONS

- Kapana Bazaar  June
- Exhibition “Orpheus”  July
- Craft Fair  July/September
- Festival “Plovdiv - Ancient & Eternal”  September
- International Photo Salon  September
- National Autumn Exhibitions  September
- Autumn Salon of Arts  September/October

CUISINE & LIFESTYLE

- Vinaria Wine Fest  February
- Plovdiv Food Park Festival  June
- Wine & Gourmet Festival  June
- Street Food & Music Festival  July
- Taste of Plovdiv  July/September
- Plovdiv Beer Fest  September
- Parade of the Young Wine  November

STREET FESTS

- Fluca - Austrian Cultural Pavilion  June-October
- 6Fest Street Arts Festival  July
- Summer in Kapana  July
- Kapana Fest  August
- Shake That Hill  August
- Old Town Festival  September
Explore Plovdiv, the ancient city with a modern attitude.

We invite you to be #together at the hundreds of small- and large-scale events.

Come and join us. You are more than welcome.

You can also be #together with us on:

Facebook: 2019plovdiv
Twitter: plovdiv2019
Instagram: Plovdiv2019

www.plovdiv2019.eu
CREATING A BUSINESS-FRIENDLY CITY

PLOVDIV MUNICIPALITY

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fax: +359 32 656 703
web page: invest.plovdiv.bg
e-mail: invest@plovdiv.bg