

Brussels, 24 June 2026  
(OR. en)

10476/26  
ADD 32

TELECOM 314  
DIGIT 173  
CYBER 287  
COMPET 802  
RECH 291  
PI 74  
MI 673  
EDUC 279  
JAI 851  
ENFOPOL 232  
COSI 103

**COVER NOTE**

---

From: Secretary-General of the European Commission, signed by Ms Martine DEPREZ, Director

date of receipt: 17 June 2026

To: Ms Thérèse BLANCHET, Secretary-General of the Council of the European Union

---

No. Cion doc.: SWD(2026) 155 annex

---

Subject: PART 3/27 COMMISSION STAFF WORKING DOCUMENT Digital Decade 2026 country report Accompanying the document COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS State of the Digital Decade 2026: Closing structural gaps and mobilising investments for 2030 and beyond

---

Delegations will find attached document SWD(2026) 155 annex.

---

Encl.: SWD(2026) 155 annex



Brussels, 17.6.2026  
SWD(2026) 155 final

PART 3/27

**COMMISSION STAFF WORKING DOCUMENT**

**Digital Decade 2026 country report**

*Accompanying the document*

**COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN  
PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL  
COMMITTEE AND THE COMMITTEE OF THE REGIONS**

**State of the Digital Decade 2026: Closing structural gaps and mobilising investments for  
2030 and beyond**

{COM(2026) 288 final} - {SWD(2026) 154 final} - {SWD(2026) 156 final} -  
{SWD(2026) 157 final}

# DIGITAL DECADE COUNTRY REPORT 2026

**Bulgaria**

## Contents

Executive summary .....	1
Bulgaria in the Digital Decade.....	1
Funding for digital and multi-country projects .....	2
A competitive, sovereign and resilient EU based on technological leadership.....	3
Protecting and empowering EU people and society.....	4
Recommendations .....	4
A competitive, sovereign and resilient EU based on technological leadership .....	6
Building technological leadership: digital infrastructure and technologies.....	6
Connectivity infrastructure .....	6
Semiconductors.....	10
Edge nodes.....	11
Quantum technologies.....	11
Supporting EU-wide digital ecosystems and scaling up innovative enterprises .....	12
SMEs with at least basic digital intensity .....	12
Take up of advanced technologies .....	14
Unicorns, scale-ups and start-ups .....	17
Strengthening Cybersecurity & Resilience.....	18
Protecting and empowering EU people and society.....	20
Empowering people and bringing the digital transformation closer to their needs .....	20
Equipping people with digital skills.....	20
Key digital public services and solutions – trusted, user-friendly, and accessible to all .....	24
Leveraging digital transformation for a smart green transition.....	30
Annex I: National roadmap analysis.....	31
Annex II: Funding, economic impacts & Multi-Country Projects.....	33

## Executive summary

**Bulgaria continues to make progress in the Digital Decade, supported by strong connectivity infrastructure and gradual improvements in digital public services. However significant gaps remain in digital skills, SME digitalisation and the uptake of advanced technologies.** The country benefits from extensive fibre coverage, increasing mobile broadband use and continued policy engagement in digital transformation. It has also expanded investment e-government and eHealth services, while strengthening its participation in European digital initiatives. At the same time, Bulgaria's overall digital performance is hampered by persistent structural weaknesses, including low levels of digital skills, SME digital intensity that is among the lowest in the EU, and low adoption of cloud computing, artificial intelligence, and data analytics.

**Some of the structural gaps identified may affect Bulgaria's capacity to translate its solid infrastructure foundations into broader digital transformation across the economy and society, fully benefit from digital transformation, and strengthen its competitiveness within the EU digital economy.** Structural constraints, including relatively low R&D intensity, fragmented research funding, limited scale-up capacity and relatively little connection between research and business affect Bulgaria's innovation ecosystem. Limited adoption of advanced digital technologies and low SME digital intensity may constrain productivity growth and the integration of Bulgarian firms into higher-value-added segments of European value chains. Persistent shortages of digital skills and uneven cybersecurity maturity also risk slowing the spread of digital technologies across sectors and regions. Without stronger investment in skills, innovation capacity and technology uptake it will take time to achieve the Digital Decade objectives.

**Despite these challenges, Bulgaria contributes to the EU's digital leadership in several emerging domains.** The country is strengthening its participation in European initiatives relating to semiconductors and quantum technologies and continues to develop research capabilities in these areas. Bulgaria's ICT sector is dynamic and provides a strong foundation for digital innovation. Initiatives supporting start-ups, technology transfer and venture financing aim to gradually strengthen the scale-up ecosystem. Continued integration into EU research and innovation networks will help further develop these capabilities and support Bulgaria's contribution to Europe's technological leadership.

### Bulgaria in the Digital Decade

**Bulgaria shows a moderate level of ambition in its contribution to the Digital Decade having set 12 national targets (out of a possible 14), half of which are aligned with the EU 2030 targets.** In its national roadmap, Bulgaria provided 12 trajectory points for 2025 (out of 13 analysed). The country is on track to meet 75% of them. Bulgaria addressed 56% of the nine recommendations issued by the Commission in 2025 by making some changes through new measures. According to the national roadmap, 48% of the measures will have been completed by the end of 2026. The total public budget allocated to these measures is EUR 597 million, which accounts for 27% of the total public budget outlined in the roadmap.

**Bulgaria is working hard to meet the Digital Decade objectives.** The national Digital Decade roadmap, initially submitted in April 2024, has undergone only minor updates and continues to prioritise the

# Bulgaria

digitalisation of public services, the development of digital skills and the digital transformation of businesses. It includes 60 measures and is largely aligned with the National Recovery and Resilience Plan (RRP) and EU funding programmes. Bulgaria has addressed most recommendations, mainly through clarifications and references to existing measures.

Bulgaria continues to base its strategy on its existing framework, the Digital Transformation of Bulgaria 2024–2030. This year, the authorities are planning to present the National Strategy for the Digital Transformation of the Republic of Bulgaria 2026–2030, which is currently at the stage of development and stakeholder consultation. It is drawing up priorities on business digitalisation and innovation, secure and inclusive digital transformation, modernisation of public administration, digital skills development, interoperable digital services, cybersecurity, and the wider use of data and emerging technologies to support economic and social development. While this strategy is set to provide a forward-looking policy direction and is designed to align Bulgaria’s digital development with the Digital Decade 2030 goals, it is not yet formally integrated into the national Digital Decade roadmap and forms no part of the measures submitted.

**According to the 2026 Digital Decade Eurobarometer, 74% of Bulgarians consider that digital policy should be a high/very high priority for the EU in shaping our future in Europe.** They also think that, in the next ten years, the EU should cooperate with Member States to reinforce cybersecurity and protection from online threats (88%), promote digital education and skills programmes (84%) and strengthen the regulation of online platforms (81%). In addition, **73% of Bulgarian respondents think that the EU should reduce its dependencies on digital technology from outside the EU**, and **80%** that the EU should prioritise investment in digital infrastructure and services that are developed and controlled in Europe. Meanwhile, **45%** would be willing to switch to an EU-based digital service provider even if that meant slightly higher costs.

## Funding for digital and multi-country projects

Bulgaria allocates close to 21% of its total RRP to digital (EUR 1.2 billion). Under cohesion policy, EUR 1.2 billion, 11% of the country’s total cohesion policy funding, is dedicated to advancing Bulgaria’s digital transformation.

Bulgaria is a member of the Alliance for Language Technologies EDIC. It is a participating state of the EuroHPC Joint Undertaking (JU) and the Chips JU.

Digital Decade KPI <sup>(1)</sup>	Bulgaria				EU		Digital Decade target by 2030	
	Latest available data <sup>(2)</sup>	DESI 2026 (year 2025)	Annual progress	National trajectory <sup>(3)</sup>	DESI 2026	Annual progress	BG	EU
Fixed Very High-Capacity Network (VHCN) coverage	90.4%	93.5%	3.5%	96.0%	85.5%	3.7%	100%	100%
Fibre to the Premises (FTTP) coverage	90.4%	93.5%	3.5%	96.0%	74.1%	7.1%	100%	-
Basic 5G coverage	81.3%	94.8%	16.6%	96.0%	96.8%	2.6%	100.0%	100%
Edge Nodes (estimate, new methodology)	-	112	-	-	7451	-	-	10 000

SMEs with at least a basic level of digital intensity*	28.4%	38.3 %	16.2%	51.8%	71.4%	11.0%	60.0%	90%
Cloud computing*	14.2%	15.7 %	5.2%	11.9%	46.7%	9.5%	15.0%	75%
Artificial Intelligence	6.5%	8.6 %	32.1%	5.7%	20.0%	48.0%	11.0%	75%
Data analytics*	21.9%	27.1 %	11.3%	7.5%	39.9%	9.5%	9.0%	75%
AI or Cloud computing or Data analytics*	29.3%	34.6 %	8.6%	-	63.2%	7.5%	-	75%
Unicorns	0	1		-	324	10.2%	-	500
At least basic digital skills*	35.5%	38.3 %	3.8%	40.4%	60.4%	4.3%	52.0%	80%
ICT specialists	4.6%	4.8%	4.3%	4.4%	5.0%	2.0%	5.0%	~10%
e-ID scheme notification		Yes						
Digital public services for citizens	68.0	71.08	4.6%	90.0	84.6	2.8%	100.0	100
Digital public services for businesses	94.0	94.04	0.1%	95.0	88.6	2.7%	100.0	100
Access to electronic health records	87.5	89.6	2.4%	85.6	86.5	4.6%	100.0	100

<sup>(1)</sup> Indicators full description, metadata and sources in the [DESI 2026 methodological note](#)

<sup>(2)</sup> Last available data is DESI2025 (reference year 2024) except for indicators marked with a star\* for which it is DESI2024 (reference year 2023)

<sup>(3)</sup> National trajectory value for 2025, if set by the country in its Digital Decade national roadmap

## A competitive, sovereign and resilient EU based on technological leadership

**Connectivity infrastructure is one of Bulgaria’s strongest digital assets**, with very high fibre and very high-capacity network (VHCN) coverage, and significant progress in 5G rollout. However, the main challenge is shifting from deployment to effective use: gigabit uptake remains limited despite high coverage, reflecting affordability constraints and territorial disparities. Progress in the deployment and effective use of 5G networks in the 3.4–3.8 GHz band remains uneven.

**There is a major shortfall in the digitalisation of businesses.** SMEs lag far behind the EU average in basic digital intensity, and the uptake of cloud solutions, AI and data analytics is still limited. A broad range of support measures has been put in place and progress is visible in some areas, but these measures have not yet translated into large-scale transformation, reflecting challenges in their accessibility, consistency and effective uptake by businesses, particularly SMEs, including through existing support structures. Key barriers include skills shortages, high investment costs, regulatory complexity, cybersecurity concerns and a lack of connection between science and business. In addition, the absence of a comprehensive action plan to implement the national AI strategy limits the coordination and impact of efforts to promote AI uptake. Priorities include strengthening advisory, skills and investment support, improving innovation support instruments, and complementing the national AI strategy with a clear implementation framework.

**Bulgaria is strengthening its technological capacities**, including in data infrastructure, edge computing and quantum research. However, the innovation ecosystem remains relatively small, with limited private investment and weak commercialisation of research.

**Cybersecurity preparedness remains low**, particularly among SMEs. Recent progress, including the transposition of the NIS2 Directive, the development of institutional capacities and targeted support measures, provides a basis for improvement, but further efforts are needed to ensure effective implementation and wider uptake.

## Protecting and empowering EU people and society

**Bulgaria's digital transformation is severely hampered by low levels of digital skills.** Digital skills gaps are particularly pronounced among older populations, people with lower levels of education and people living in rural areas. These deficits limit the ability of individuals and businesses to adopt and use digital technologies effectively and are closely linked to the country's poor performance in SME digitalisation. The evidence suggests that progress will depend on a combination of targeted training efforts, continued attention to teacher preparation and curriculum development, local digital inclusion initiatives, and effective coordination across delivery channels.

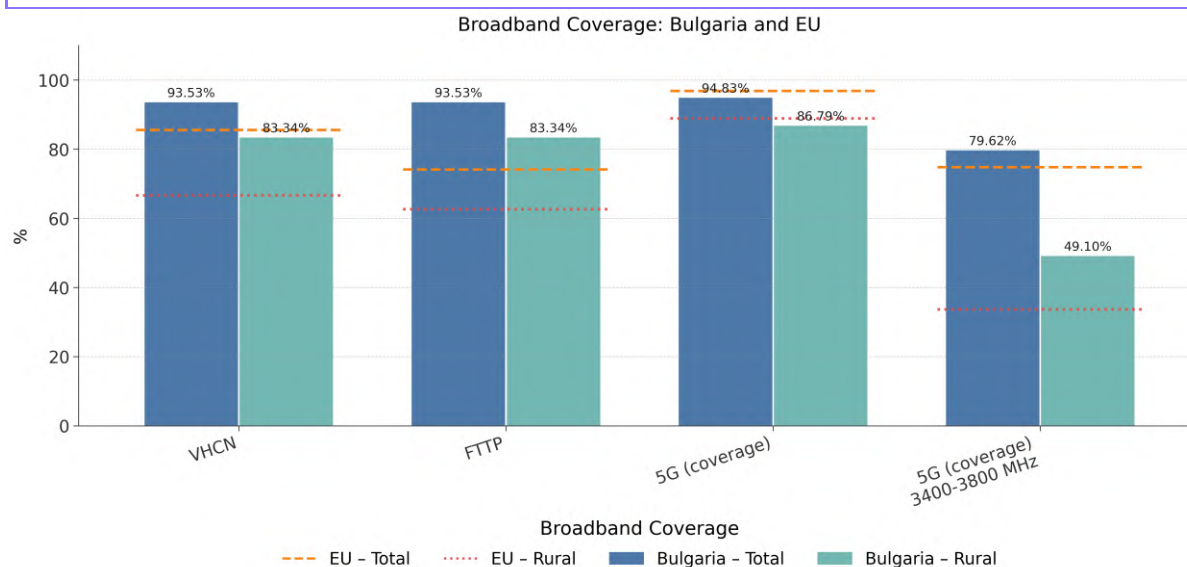
**At the same time, Bulgaria continues to expand initiatives aimed at improving digital skills and boosting workforce capabilities.** EU-funded programmes support upskilling and reskilling, while education and vocational-training reforms aim to increase the supply of ICT specialists and to help reflect the needs of the labour market. Despite these initiatives, shortages of digital talent remain a major constraint and may hinder the adoption of advanced digital technologies.

**Digital public services continue to improve**, supported by ongoing investment in e-government infrastructure and interoperability frameworks. The availability of electronic services continues to expand, and Bulgaria performs comparatively well in digital public services for businesses. However, the uptake of e-government services, particularly among citizens, remains low compared with the EU average, also in the field of justice, highlighting the need to improve user-friendliness, awareness and trust to derive maximum benefit from public sector digitalisation, including for cross-border services. Notably, In Bulgaria, the digitalisation of public judicial services lags behind as concerns the deployment of the necessary IT solutions which are indispensable for cross-border judicial cooperation as a key reform of digital public services.

### Recommendations

- **Basic digital skills:** Strengthen Bulgaria's digital skills base, particularly among groups facing persistent digital inclusion barriers, through education, training and local inclusion initiatives, while improving coordination and monitoring across delivery channels.
- **ICT specialists:** Increase the supply of ICT specialists by strengthening education and training pathways, improving links between education, research and industry, and addressing persistent challenges in the digital talent pipeline.
- **Digitalisation of SMEs and take-up of advanced technologies:** Strengthen framework conditions for SME digitalisation and innovation, including by improving links between research and business, facilitating investment in digital transformation and enhancing the effectiveness of innovation support ecosystems.
- **Artificial intelligence:** Accelerate the uptake of AI, cloud computing and data analytics, particularly among SMEs, by strengthening advisory, skills and innovation support, facilitating deployment by businesses, and improving strategic coordination.

- **Cybersecurity:** Strengthen cybersecurity resilience among SMEs and critical sectors, including by supporting preparedness, improving the uptake of cybersecurity measures among less mature organisations, and reinforcing resilience against emerging risks such as AI-enabled threats.
- **Key public services:** Improve the uptake, quality and interoperability of digital public services for citizens by accelerating the digitalisation and simplification of priority services, strengthening user-friendliness and accessibility, expanding the use of digital identity, and improving digital justice and cross-border public services.
- **e-Health:** Expand access to and uptake of digital health services by improving the availability, interoperability and usability of eHealth solutions, addressing barriers to access and use, and strengthening the integration of health data across the healthcare system.
- **Fixed and mobile connectivity:** Foster demand for gigabit connectivity and strengthen the deployment and resilience of connectivity infrastructure by addressing affordability and digital readiness barriers, accelerating fibre and 5G deployment (including 5G SA and the 3.4–3.8 GHz band), supporting investment-friendly conditions for future network development, and reinforcing the resilience and security of submarine cable infrastructure.



## A competitive, sovereign and resilient EU based on technological leadership

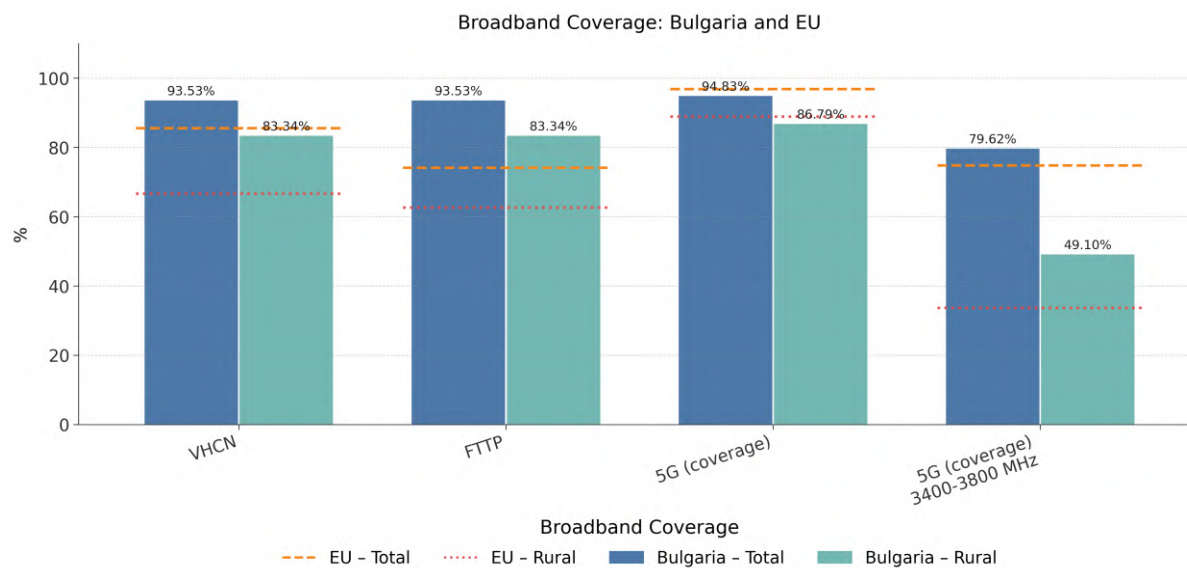
### Building technological leadership: digital infrastructure and technologies

#### Connectivity infrastructure

#### Performance assessment

**Bulgaria achieved a fixed very high-capacity network (VHCN) coverage rate of 93.53% in 2025, above the EU average of 85.54%, an increase of 3.5%.** Its annual growth rate was slightly below the EU's 3.7%. In sparsely populated areas, Bulgaria's VHCN coverage reached 83.34%, also above the EU average of 66.66%, an increase of 5.4%, below the 7.7% recorded in the rest of the EU. The country is on track according to its trajectory presented in the Digital Decade national roadmap.

**Bulgaria's fibre-to-the-premises (FTTP) coverage also reached 93.53% in 2025, well above the EU average of 74.13%, an increase of 3.5%.** Bulgaria's growth rate was below the 7.1% in the rest of the EU, but this is due to an already high level of coverage. In sparsely populated areas, FTTP coverage reached 83.34%, above the EU average of 62.61%, a 5.4% rise, slightly below the 6.5% in the rest of the EU. The country is on track according to its national trajectory.



**In 2025, Bulgaria's 5G coverage reached 94.83%, following a 16.6% increase on 2024, but this was slightly below the EU average of 96.79%.** The country is on track according to its national trajectory. In sparsely populated areas, 5G coverage increased to 86.79%, still below the EU average of 88.88%, but with a significantly higher annual growth rate (126.9% compared to 11.7% in the EU).

**Bulgaria's 5G coverage in the 3.4–3.8 GHz band stood at 79.62%, above the EU average of 74.75%.** Only 6.9% of 5G base stations constitute 5G Stand Alone (SA); the EU average is 20.9%. The licence

# Bulgaria

will expire in 2031<sup>1</sup>(900 MHz, 1800 MHz). This 3.4-3.8 GHz mid-band is crucial because it provides a good balance between coverage with high capacity, making it a cornerstone for advanced 5G use cases, which can be replicated as reference models across sectors and socio-economic drivers. These include applications in manufacturing, such as industrial IoT and healthcare, for example telemedicine. The upcoming expiry of the spectrum licence in 2030 presents an opportunity to establish pro-investment conditions<sup>2</sup>. In sparsely populated areas, coverage in this band increased to 49.1%, well above the EU average of 33.71%, a steep increase of 28.3%, only slightly below the EU growth rate of 32.9%.

**The table below provides an overview of VHCN, FTTP and 5G coverage across NUTS-2 regions in Bulgaria.** It indicates relatively balanced connectivity performance across regions, with high and consistent VHCN and 5G coverage. FTTP deployment is also advanced, although moderate disparities persist, particularly in rural areas of the north-west region.

	VHCN coverage		FTTP Coverage		5G Coverage	
	Overall	Rural	Overall	Rural	Overall	Rural
National coverage	93.53%	83.34%	93.53%	83.34%	94.83%	86.79%
<b>Severen tsentralen</b>	91.80%	84.88%	91.80%	84.88%	93.12%	84.66%
<b>Severozapaden</b>	94.34%	87.85%	94.34%	87.85%	92.88%	82.66%
<b>Severozapaden</b>	87.71%	72.95%	87.71%	72.95%	92.84%	87.66%
<b>Yugoiztochen</b>	93.03%	84.01%	93.03%	84.01%	94.61%	89.25%
<b>Yugozapaden</b>	94.35%	88.68%	94.35%	88.68%	97.34%	89.80%
<b>Yuzhen tsentralen</b>	96.36%	84.25%	96.36%	84.25%	94.31%	86.34%

**In terms of uptake, Bulgaria has 2.92% of fixed broadband subscriptions with speeds of 1 Gbps or more an increase of 44.3% in 2025, below the EU average of 26.97%.** In 2024, Bulgaria's proportion was 2.02%, well below the EU average of 22.25%. Although Bulgaria's annual growth rate of 44.3% far exceeds the EU figure of 21.2%, the country continues to trail behind the EU in terms of the overall proportion of high-speed broadband subscriptions.

**Bulgaria's 5G SIM penetration reached 41.25% in 2025, up by 69.0% year-on-year, though still below the EU average of 55.55%.** In 2024, Bulgaria's proportion was 24.41%, also below the EU average of 35.56%. While Bulgaria's annual growth rate of 69.0% exceeds the 56.2% in the rest of the EU, it is evident that despite notable progress, Bulgaria still lags behind the overall EU performance in terms of 5G SIM card penetration.

## *Policy context and assessment of the recommendations*

**Bulgaria performs strongly in VHCN and FTTP coverage, exceeding EU averages both at national level and in sparsely populated areas.** Growth is steady reflecting the already high level of coverage. 5G coverage has expanded rapidly, particularly in rural areas, albeit starting from a lower base. However, rollout of 5G networks in the 3.4–3.8 GHz band has slowed, especially in sparsely populated areas

<sup>1</sup> European 5G Observatory 2026

<sup>2</sup> Pro-investment conditions include longer licence durations to strengthen investment certainty, coverage obligations to accelerate deployment and reasonable spectrum prices that preserve capital for network rollout.

compared to the EU. Overall, while connectivity coverage and rollout is strong, the country still faces key challenges in maintaining growth in fixed infrastructure and improving mid-band 5G coverage.

**Bulgaria's main connectivity challenge has shifted from infrastructure deployment to effective use.**

Despite very strong coverage, the uptake of gigabit connectivity remains significantly below availability, which suggests persistent demand-side constraints. According to Bulgaria's national regulatory authority, the Communications Regulation Commission (CRC), these constraints primarily affect gigabit ( $\geq 1$  Gbps) services, where there remains a significant price differential in relation to widely used 100–500 Mbps and the perceived added value for most users is limited. A clear mismatch persists between very high FTTP coverage and relatively low subscription to gigabit services, which are often perceived as premium packages compared to widely used 100–500 Mbps services. **The data on connectivity uptake suggests that, despite encouraging growth rates, Bulgaria continues to lag behind EU averages in broadband uptake.** There has been progress recently, yet the gap in absolute terms remains significant. Developments in infrastructure, market dynamics and digital skills are likely to play an important role in shaping future convergence. Continued monitoring will help demonstrate whether current trends are sufficient to narrow the disparity over time.

According to the CRC, very high-capacity networks in Bulgaria are based on FTTP infrastructure. While the EU definition of VHCN may include other technologies such as cable DOCSIS 3.1, these are not currently deployed in Bulgaria.

**More broadly, fixed internet uptake and, to a lesser extent, mobile broadband use, are improving but remain below EU averages.** This suggests that recent growth has not yet translated into convergence in absolute terms. The gap appears to reflect a combination of factors, including price sensitivity for gigabit services, lower income levels in rural areas and a perception that higher speeds are not needed. Infrastructure availability alone is not enough to drive higher adoption at this stage, and future developments will depend on how these demand-side dynamics evolve. At present, no specific regulatory measures are in place to directly stimulate demand for gigabit services, and uptake is expected to evolve gradually in line with market dynamics and changing usage patterns.

**Recent market data confirm this structural demand gap.** As of mid-2025, FTTP subscribers account for 56.6% of total broadband users, an increase of around 2.5% in the first half of the year (nearly 40 000 additional users). However, only around 3% of subscribers use speeds of 1 Gbps and above. Most users remain in the 100–500 Mbps range, which they currently perceive as sufficient to meet their needs for common applications such as streaming, remote work and online services.

**Territorial disparities reinforce this pattern.** More than 80% of gigabit users are concentrated in Bulgaria's largest cities, with around one third located in Sofia alone. Over 96% of gigabit subscribers are in urban areas, and rural adoption remains very limited. These trends confirm that the main factors in next-generation connectivity uptake are affordability, perceived need and local socio-economic conditions.

These constraints are more pronounced in rural and economically less developed areas, where lower income levels and reduced potential demand hinder uptake.

**At the same time, Bulgaria continues to make progress in infrastructure deployment, particularly in 5G.** Coverage has expanded rapidly from a relatively low base, including in sparsely populated areas. According to the CRC, recent 5G deployment dynamics are not driven by changes in coverage

obligations, which remain unchanged, or by clearly identifiable shifts in demand for advanced use cases.

**The transition away from legacy copper infrastructure is progressing through market dynamics rather than regulatory intervention.** There is no formal switch-off plan for copper, and operators are not required to submit decommissioning strategies. The incumbent remains the sole provider of xDSL services, but usage is declining rapidly. Between 2023 and mid-2025, the number of xDSL subscribers – approximately 67 000 users, or 2.5% of the total broadband base – fell by more than 30%. This decline reflects a steady move towards fibre networks (primarily FTTP) and other very high-capacity infrastructures. In this context, the regulator considers that formal switch-off obligations are not necessary as market-driven transition is well advanced.

**Deployment conditions broadly support infrastructure expansion, although some structural limitations remain.** The regulator facilitates network rollout through the legal framework on access to physical infrastructure and acts as a dispute settlement body. The Broadband Cost Reduction Directive has been correctly transposed and has improved investment predictability and access conditions. However, the CRC's decision on physical infrastructure access has been suspended by the national competent court and is currently not effective, which may limit its practical impact on deployment costs and infrastructure sharing.

The Ministry of Transport and Communications is responsible for implementing the Gigabit Infrastructure Act (GIA). To speed up the rollout of VHCNs and to ease the installation of mobile network facilities, including in rural areas, legislative amendments were introduced in the [Electronic Communications and Physical Infrastructure Act in April 2025](#), followed by related adjustments in the secondary legislation. At this stage, no new amendments have been published, and the implementation of the GIA is ongoing.

The regulator is currently reviewing the wholesale local access market.

**The fixed broadband market remains fragmented**, combining many small regional providers with a limited number of nationwide operators. Infrastructure-based competition is supported and fibre investment continues, but this situation may limit economies of scale and coordinated deployment strategies, as investment capacity remains concentrated among larger operators.

**Public investment continues to play a key role in extending connectivity, particularly in underserved areas.** Under the national RRP, the large-scale deployment of digital infrastructure in Bulgaria has a total budget of EUR 240 million. Contracts worth approximately EUR 222 million were signed in June 2025 for the construction of around 7 000 km of fibre infrastructure. The project will extend the State-owned network to 140 municipalities and more than 320 populated places (settlements), providing ultra-fast broadband to over 500 000 citizens and connecting at least 700 base stations. These measures are expected to reduce urban-rural disparities and support the digitalisation of businesses and public services. However, while public intervention supports infrastructure deployment, less emphasis is placed on stimulating demand and addressing affordability barriers, which remain key constraints to the wider uptake of gigabit services.

**From a resilience perspective, Bulgaria is bolstering the security of its connectivity infrastructure.** Minimum security requirements and risk-management rules remain in force, while new cybersecurity legislation places restrictions on high-risk vendors. Evidence of vendor diversification strategies and

# Bulgaria

planned transitions towards alternative architectures, including O-RAN, suggests that progress is being made in reducing dependencies and improving network resilience.

**Bulgaria is strengthening its role in regional and international connectivity corridors, including through emerging submarine cable initiatives in the Black Sea.** In this context, the planned [Kardesa submarine cable system](#) is expected to connect Bulgaria with Türkiye, Georgia and Ukraine, contributing to the development of high-capacity infrastructure and offering an alternative Europe–Asia data route. Construction is planned to start in 2027 on the project, which is based on coordinated public-private cooperation and includes the development of landing stations and terrestrial backhaul infrastructure, supporting Bulgaria’s position as a regional connectivity hub.

In parallel, the [EU-funded Balkans Digital Gateway Works \(BDGW\) project \(2025–2028\)](#) supports the deployment of high-capacity backbone infrastructure between Bulgaria, Greece and Romania, and facilitates the integration of submarine and terrestrial networks at key landing points on the Black and Aegean Seas. These developments contribute to enhancing network resilience and route diversity, strengthening security and improving regional interconnectivity. Given the strategic importance and vulnerability of submarine cables, further measures to improve structured cross-border coordination, risk preparedness and infrastructure protection could ensure the long-term resilience and security of these assets in the Black Sea basin.

**According to the 2026 Digital Decade Eurobarometer**, 79% of Bulgarians would like the EU to be a global leader in technological innovation and infrastructure, while 68% believe that the EU is one of the world leaders in digital innovation and technology, above the EU average of 54%.

**2025 recommendation on Fixed and mobile connectivity:** Accelerate the expansion of FTTP/fixed VHCN and 5G coverage, with a focus on ensuring that the pace of deployment in sparsely populated areas is maintained. Continue investment to consolidate Bulgaria’s strong position, especially in 5G deployment.

**In 2025, Bulgaria made some efforts to address the recommendation through new policy actions.** The country continued expanding fixed and mobile infrastructure, including further progress in fibre deployment and significant expansion of 5G coverage. However, major challenges persist in translating strong infrastructure availability into effective use, as gigabit uptake remains low and demand-side barriers such as affordability and limited digital readiness continue to hamper adoption. In addition, deployment/rollout in the 3.4–3.8 GHz band weakened in 2025, suggesting that the quality of deployment needs to improve.

## Semiconductors

In response to the new strategic challenges at European level, a new Priority 4 entitled Development of strategic technologies for Bulgaria and deployment of the potential for cross-sectoral cooperation for innovation has been included in the [Programme Research, Innovation and Digitalisation for Smart Transformation \(PRIDST\)](#) (specific objective RSO1.6. Support for investments contributing to the objectives of STEP under Article 2 of Regulation (EU) 2024/795) concerning the [Strategic Technologies for Europe Platform](#) (STEP). Actions under Priority 4 meet the criteria set out in the STEP Regulation and are designed to directly address the main challenges facing Bulgaria, as identified in the 2024

country report. Priority 4 focuses on supporting innovation and critical technologies in the following sectors: digital technologies and innovation in deep technologies and biotechnology. Support for projects in the field of digital technologies will include activities that contribute to achieving the objectives of the Digital Decade policy agenda up to 2030.

The PRIDST Indicative Annual Work Programme for 2026 (IAWP 2026) includes a procedure to support the participation of Bulgarian organisations in institutionalised European partnerships with a total budget of EUR 49.2 million (ERDF and national co-financing). This procedure will provide funding to stimulate international scientific cooperation and the participation of Bulgarian consortia in the EU Framework Programmes through collaboration with the institutionalised European partnerships including the Chips JU.

## Edge nodes

### *Performance assessment*

**According to the Edge Node Observatory, Bulgaria is estimated to have deployed 112 edge nodes by 2025.** Due to a change in methodology, this number cannot be compared to previous estimations.

### *Policy context and assessment of the recommendations*

**Bulgaria's edge ecosystem is linked to broader developments in data infrastructure and digital services.** Under the PRIDST, Bulgaria is investing in the development of data infrastructure and data spaces in strategic sectors. Priority Area 1 (Data as a key asset of society) supports the creation of data spaces, and the tools needed to manage and operate them. These investments aim to enable the development of data-driven services and improve digital processes and decision-making in key areas of the economy. EUR 103 million has been allocated to these measures.

Several projects are currently under implementation, including (i) the development of a strategic, organisational and technical framework for data management and interoperability; and (ii) strategic communications and promotion of the potential of data for good governance.

In addition, support for the deployment and uptake of advanced digital technologies – including edge computing, AI, cloud services, data infrastructure and cybersecurity solutions – is provided under the Programme Competitiveness and Innovation in Enterprises (PCIE) 2021–2027, which supports digital transformation among businesses.

## Quantum technologies

**Bulgaria is continuing to develop its research capabilities in quantum technologies,** with initiatives aimed at strengthening the national quantum research community and supporting participation in European research networks. Activities in this field mostly take place in academic and research institutions, including initiatives linked to Sofia Tech Park and leading universities.

While Bulgaria has developed emerging research capacities in quantum technologies, the ecosystem is relatively small and largely focused on academic research. Strengthening links between research institutions, industry and European initiatives will help scale applications and integrate Bulgarian actors into the broader EU quantum ecosystem.

## Supporting EU-wide digital ecosystems and scaling up innovative enterprises

SMEs with at least basic digital intensity

*Performance assessment*

**In Bulgaria, 38.33% of SMEs had at least a basic level of digital intensity, an increase of 16.2% annually between 2023 and 2025, and well below the EU average of 71.39%.** In 2023, that figure was 28.41%, compared with 57.90% for the EU. Although Bulgaria's growth rate exceeds the EU's 11.0%, the overall level remains significantly lower, suggesting persistent gaps in the adoption among SMEs of basic digital tools. The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap.

**In Bulgaria, 1.80% of SMEs had a very high digital intensity index, an increase of 10.7% annually between 2023 and 2025, and well below the EU average of 9.07%.** E-commerce adoption also remains limited, with online sales accounting for only 5.89% of SME turnover and 13.90% of SMEs selling online. Bulgaria also performs weakly in related indicators: only 25.49% of SMEs use electronic information-sharing systems, while 40.82% use social media, the lowest proportion in the EU.

*Policy context and assessment of the recommendations*

**Bulgarian SMEs face persistent structural barriers to the adoption of advanced digital technologies,** including shortages of digital skills, high upfront investment costs, limited awareness of digital solutions and cybersecurity concerns. Organisational resistance to change and weaker digital infrastructure outside major urban areas further constrain adoption.

[Stakeholder evidence](#) confirms that human capital remains the main barrier. According to [a 2025 survey](#) of 847 businesses conducted by the Bulgarian Industrial Association, 40% identified a lack of digital skills as the primary obstacle to digitalisation, ahead of financial constraints (33%) and limited access to information (15%). Regulatory and administrative burdens are also increasingly cited, with 7% of firms reporting regulatory barriers in 2025. Companies report persistent fragmentation, parallel digital and analogue procedures and limited institutional capacity, issues that increase compliance costs and may deter investment or force companies to relocate.

Bulgaria relies largely on EU-funded programmes to support SME digitalisation, notably through the NRRP and cohesion policy. A central instrument is the PRIDST, which supports cooperation between research and business and finances a network of 12 EDIHs, with total funding of EUR 31.8 million. These hubs provide advisory services, training and support for technology adoption, although access is affected by administrative complexity.

Additional support is provided through voucher schemes and targeted grant programmes, which have stimulated initial uptake but results are patchy in terms of their scale and use. Collaboration between research institutions and businesses also remains weak, with limited technology transfer and low private R&D investment, which deters innovation.

To address these gaps programmes have been established. Under the NRRP, strong demand was observed for basic digitalisation support (over 7 600 applications, with more than 1 500 projects funded). Building on this, the Competitiveness and Innovation in Enterprises Programme (PCIE) expands support through measures such as Digitalisation of Enterprises and Introduction of Industry

# Bulgaria

4.0 Technologies, with over 1 600 projects approved (EUR 29.58 million), which will start implementation in 2026. Additional schemes such as the small innovative grants scheme, further support SME innovation, with a second phase planned for 2026 (EUR 12.7 million).

Recent investment efforts are set to reinforce SME digitalisation in Bulgaria. As [announced in April 2026](#), around EUR 210 million from the EU's JEREMIE initiative will be channelled to innovative firms to develop and scale technologies in strategic sectors, including microelectronics, AI and defence. Supported by the European Investment Bank's European Investment Fund, this initiative is expected to strengthen the innovation ecosystem, improve access to finance for high-growth SMEs, and accelerate the uptake of advanced digital technologies across the economy.

**Despite these efforts, the rollout of digital technologies remains uneven.** Few firms are taking steps forward, while a large proportion of SMEs are lagging behind. [Evidence](#) from the European Investment Bank Investment Survey suggests a relatively modest innovation profile, with lower investment in intangible assets such as software, R&D and skills. Overall, existing measures have not yet translated into major improvements in SME digital maturity, reflecting persistent constraints in skills, investment and connections between science and business.

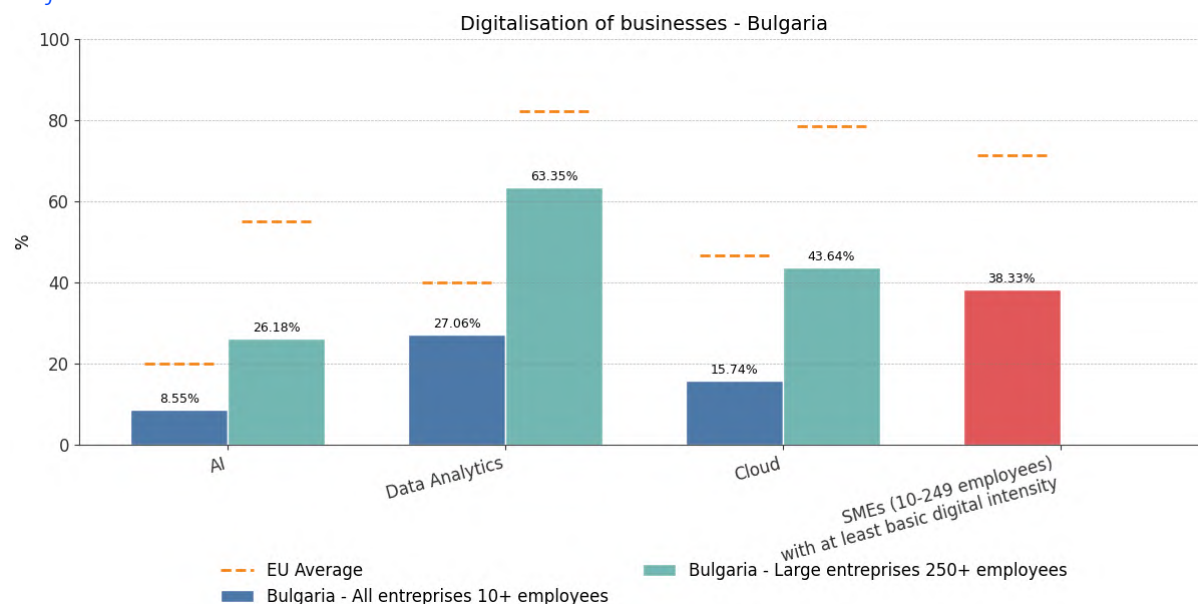
**2025 recommendation on digitalisation of SMEs:** Improve the business climate and investment in R&D, notably strengthen Bulgaria's public science base and its linkages with the business ecosystem, while boosting private R&D efforts through well-calibrated public support tools.

**In 2025, Bulgaria continued the implementation of existing measures but did not take any new measure.** While existing programmes provide useful support, the digitalisation level of SMEs remains well below the EU average and the rollout of digital tools across the SME base is still limited. Persistent weaknesses in science-business collaboration, technology transfer and investment in intangible assets continue to constrain broader progress.

# Bulgaria

## Take up of advanced technologies

### Performance assessment



**In Bulgaria 27.06% of firms adopted data analytics, after annual growth of 11.3% between 2023 and 2025, below the EU average of 39.85%.** The country's growth rate exceeds the EU's 9.5%, suggesting that it is catching up. In the case of SMEs this figure stands at 26.18%, below the EU average of 38.59%, and 63.35% in the case of large businesses, below the EU average of 82.03%. The country is on track according to its trajectory presented in the Digital Decade national roadmap.

**In Bulgaria 15.74% of companies adopted cloud technologies, annual growth of 5.2%, far below the EU average of 46.69%.** Growth is also slower than the EU's 9.5%. The figure for SMEs is 15.06%, and 43.64% for large businesses, both well below EU averages. The country is on track according to its national trajectory, but the adoption of cloud technology is one of the largest gaps to bridge.

**In Bulgaria 8.55% of businesses adopted AI, after annual growth of 32.1% between 2024 and 2025, below the EU average of 19.95%.** The figure for SMEs is 8.12%, compared with 18.90% in the EU, and 26.18% for large businesses, compared with 55.03% in the EU. The country is on track according to its national trajectory, although adoption remains at an early stage.

**In the case of AI, cloud computing or data analytics taken together, the proportion of adoption among companies in Bulgaria is 34.62%, after annual growth of 8.6%, well below the EU average of 63.20%.** Bulgaria's growth rate is slightly above the EU's 7.5%, but adoption remains low in all forms of business, especially SMEs.

**Overall, Bulgaria is making gradual progress in the uptake of advanced digital technologies.** Adoption of data analytics and AI is increasing and growth rates in some areas exceed the EU average, suggesting that the country is catching up. However, overall levels of adoption remain significantly below EU averages, particularly for cloud computing and for the combined use of advanced technologies among SMEs. This indicates that Bulgarian businesses are still at an early stage of digital transformation and that a more comprehensive rollout of advanced digital solutions will be necessary if the gap to the EU is to be closed.

In terms of Bulgarian citizens' perceptions, 76% of respondents in the 2026 Digital Decade Eurobarometer believe that development of AI should be carefully regulated to ensure safety, even if this means that AI developers face some constraints. In addition, 70% of Bulgarians agree that AI should reinforce the EU's competitiveness in the world.

## *Policy context and assessment of the recommendations*

**According to the Bulgarian authorities SMEs face several structural obstacles to the uptake of advanced digital technologies.** These include shortages of digital skills and technical expertise, high initial investment costs associated with technologies such as AI and cloud solutions, and limited awareness of their benefits and practical applications. Cybersecurity concerns and organisational resistance to changing traditional business processes also act as barriers to adoption. In addition, digital infrastructure gaps outside major urban areas may further hinder the adoption of advanced technologies. Together, these factors slow the pace at which Bulgarian companies adopt and integrate advanced digital technologies.

Additionally, stakeholders report that regulatory uncertainty, particularly regarding implementation of the AI Act, is affecting companies' willingness to adopt AI technologies. This is broadly consistent with [findings](#) from the 2025 Public Administration AI Readiness Index developed by the Bulgarian Institute of Public Administration. These suggest that, despite the launch of several pilot initiatives and preparatory measures, Bulgarian public administration and institutions remain at an early stage of AI deployment, with limited internal policies, low levels of actual use, a limited number of institutional AI policies, and low levels of awareness of the requirements introduced by the AI Act.

[BIA's pulse survey](#) from spring 2025 indicates that progress in the digital transformation of the Bulgarian business sector has been slow and uneven. Only 16% of surveyed firms say that they have adapted their business models to digital realities, while 9% are currently implementing changes and 22% plan to invest in digital transformation. At the same time, almost half of respondents (46%) do not envisage investing in digital transformation. This confirms the persistence of these barriers, particularly among smaller firms, and highlights the risk of widening gaps in relation to the Digital Decade objective of widespread adoption of advanced digital technologies across EU businesses.

National assessments indicate that, while Bulgaria has established a broad digital policy framework, challenges remain regarding the effective uptake and impact of existing instruments. While multiple funding programmes support SME digitalisation, their uptake remains uneven – particularly among smaller firms – due to administrative complexity and insufficient alignment with business needs. As a result, translating policy instruments into measurable digital transformation outcomes remains a key challenge.

More broadly, findings from the 2025 Public Administration [AI Readiness Index](#) suggests that AI integration across Bulgaria's public administration remains at an early stage. The assessment identified limited AI use and highlighted challenges related to strategic planning, skills development and organisational preparedness. While there is openness to innovation, the lack of formal strategies, internal governance frameworks and trained personnel continues to limit the effective deployment of AI solutions across the public sector. Overall, although Bulgaria's policy framework provides substantial financial support for business digitalisation through grants, financial instruments and EU-funded programmes, challenges remain in ensuring that they are adopted and implemented effectively.

To support the uptake of advanced technologies, Bulgaria is implementing targeted measures under the PCIE. A grant procedure supporting the introduction of Industry 4.0 technologies was launched in August 2025 by the Ministry of Innovation and Growth. The measure prioritises projects involving technologies such as big data analytics, cloud computing, the industrial internet of things (IIoT), AI, cyber-physical systems, digital twins, collaborative robots, and augmented or virtual reality. By the deadline of December 2025, more than 740 project proposals had been submitted, applying for EUR 176.7 million in grants – more than three times the available budget of EUR 54.19 million. The projects selected for funding are expected to be announced in the first half of 2026, with implementation planned for summer 2026 onwards.

In addition to grant schemes, financial instruments also support digital transformation. Under the PCIE, the ‘portfolio guarantee with loss cap for digitalisation’ provides loan and leasing support for companies investing in digital technologies through selected financial intermediaries, helping them to reduce the financing risks associated with digital investment. Complementary support is provided through the PRIDST, which includes measures supporting the development of data infrastructure and data spaces in strategic sectors. Priority Area 1 (Data as a key asset of society) aims to build data ecosystems, management tools and data-driven digital services to support decision-making and digital innovation, with an allocated budget of EUR 103 million.

Bulgaria’s national AI strategy, adopted in 2020, provides a broad strategic framework structured around key pillars such as infrastructure, skills, research and innovation. However, it is not yet complemented by a comprehensive action plan with clearly defined measures, timelines and implementation mechanisms, which limits its operational impact and the effective coordination of AI-related initiatives.

Strengthening the effectiveness and uptake of existing support instruments is crucial to boosting the adoption of advanced digital technologies across the Bulgarian economy. EDIHs are expected to play a central role in supporting the digital transformation of SMEs and public sector organisations by providing access to testing facilities, expertise and advisory services. However, their potential has yet to be fulfilled, and ensuring their consolidation and effective integration within the national support ecosystem will be a key factor in increasing the uptake of advanced digital technologies, including AI, and improving the accessibility and consistency of support for businesses.

**2025 recommendation on the adoption of advanced technologies:** Improve the business climate and investment in R&D, notably strengthen Bulgaria’s public science base and its linkages with the business ecosystem, while boosting private R&D efforts through well-calibrated public support tools.

**2025 recommendation on AI:** Continue the initiatives to promote AI development and adoption, with a focus on collaboration, ethical considerations, and policy alignment with the EU and across sectors.

**In 2025, Bulgaria continued the implementation of existing measures but did not take any new measures.** Although the adoption of AI and data analytics increased, overall uptake remains well below the EU average, especially for cloud computing and among SMEs. Existing support instruments have not yet been widely adopted, reflecting persistent barriers linked to skills shortages, limited awareness of use cases and uneven uptake of support schemes.

## Unicorns, scale-ups and start-ups

### *Performance assessment*

**At the beginning of 2026, Bulgaria hosts one unicorn** for the first time, indicating a nascent but still limited scale-up ecosystem. On this matter the country did not provide a national trajectory point for 2025 in the Digital Decade national roadmap.

### *Policy context and assessment of the recommendations*

The availability of risk capital has improved over the years and supports the growth of Bulgaria's start-up ecosystem, but it is still small compared with other countries. Investment in venture capital has increased (0.02% of GDP in 2024 compared with 0.01% in 2019) but remains well below the EU average (0.06%). This growth, particularly in software-related firms, has contributed to [Bulgaria's emergence](#) as an entrepreneurial hub in south-east Europe, with over EUR 1 billion invested between 2020 and 2025 and the highest number (489) of funded start-ups per capita in the region during this period.

**Despite this progress, early-stage innovative firms continue to face a persistent financing gap throughout their lifecycle**, which indicates that the private equity and venture capital markets are under-developed. [Structural weaknesses also remain](#), including limited capacity to generate STEM-based start-ups and modest commercialisation of research. In addition, [regulatory barriers](#) remain significant, with fragmented frameworks and burdensome processes for licensing and judicial procedures when setting up a company.

**Further constraints relate to the broader innovation framework.** Limited support for Bulgaria's National Standardisation Bodies affects their competitiveness, while the relatively low number of standards translated into Bulgarian (260 in 2024) may hinder their uptake by domestic firms. This chiefly affects SMEs and start-ups, as they are more likely to rely on national-language standards and may face barriers to market access.

**Within the PCIE, several financial instruments aim to strengthen the innovation capacity of companies and support the creation and development of start-ups and scale-ups.** The Entrepreneurship Fund promotes entrepreneurship and business creation through three sub-funds: Early Stage, with a public allocation of EUR 30 million, Venture Capital, (EUR 30 million) and Growth (EUR 40 million). In addition, a financial instrument entitled Fund for Innovations in Enterprises has been launched to encourage the creation and implementation of innovations through equity and quasi-equity investments, focusing on companies at the early stages of development. EUR 32.17 million has been allocated to this fund from the public purse.

Under the PRIDST, the Technology Transfer Fund (TTF), a dedicated financial instrument will be established to support the creation and development of companies commercialising research results. It is aimed at improving the effectiveness of innovation funding by applying a more market-oriented approach to assessing the economic viability of research outcomes. The total funding allocated amounts of up to EUR 60 million. In parallel, the PRIDST helps to strengthen technology transfer structures by establishing a national technology transfer framework. A central hub is to be set up at Sofia Tech Park, alongside regional technology transfer offices in universities and research organisations, aimed at accelerating the commercialisation of research results and supporting the creation of spin-off companies.

**The innovation ecosystem is further supported through a network of EDIHs**, which provide advisory services, testing facilities and innovation support to businesses adopting digital technologies. Despite these policy initiatives, Bulgaria's start-up ecosystem remains relatively small compared with more mature EU innovation hubs, and boosting innovative firms still depends largely on public support instruments and EU-funded programmes.

## Strengthening Cybersecurity & Resilience

**In 2024 only 31.28% of Bulgarian enterprises used at least five cybersecurity security measures in 2024** (out of 11 [as measured by Eurostat](#)), below the EU average of 56.85% and the lowest proportion among Member States. This suggests significant shortcomings in the cybersecurity preparedness of the SME sector. The gap between Bulgaria and the EU is particularly pronounced in the use of authentication via biometric methods (9.53% in Bulgaria, 18.27% in the EU), encryption techniques (21.79%, EU: 39.72%), and ICT security tests (18.88%, EU: 34.64%).

**The relatively low cybersecurity preparedness of SMEs in Bulgaria is closely linked to broader structural barriers to digitalisation**, including shortages of digital skills, limited awareness of cybersecurity risks, high investment costs and uneven digital infrastructure outside major urban centres. These factors contribute to **lower levels of digital maturity, limited uptake of advanced digital technologies and lower implementation of cybersecurity practices** compared to the rest of the EU. In particular, SMEs often **lack dedicated expertise and resources** to deploy more sophisticated security measures, leaving them increasingly exposed to cyber risks as digitalisation progresses.

[BIA's pulse survey](#) from spring 2025 suggests that companies remain at very different stages of readiness for the new requirements under the NIS2 framework. Only 9.4% say they are fully ready, roughly one quarter are preparing and another fifth consider themselves compliant but in need of further training. At the same time, more than one third have not started preparations or are unaware of the obligations, indicating significant implementation risks and highlighting the importance of continued awareness-raising, sector-specific guidance and accessible training.

**Industry stakeholders report a growing awareness of cybersecurity risks**, including increased targeting of critical sectors such as healthcare. Stakeholder consultations also indicate that, despite increased investment and awareness driven by recent EU legislation, **many SMEs may still face challenges in preparing for compliance** and would benefit from targeted training and advisory support. **In response, Bulgaria has introduced [a formalised cybersecurity professional qualification framework](#)** aligned with the European Qualifications Framework, covering levels 4 and 5 and including training in areas such as incident response, risk analysis and security management.

**Bulgaria has taken steps to strengthen its cybersecurity governance framework** through legislative alignment with EU cybersecurity policy. In February 2026, the Bulgarian Parliament adopted amendments to the Cybersecurity Act to incorporate the EU NIS2 Directive into national law, significantly updating the country's cybersecurity regulatory framework. The revised legislation expands the scope of cybersecurity obligations to 18 sectors, including public administration, energy, transport, healthcare, finance and digital infrastructure, and lays down more stringent risk management and reporting requirements for medium and large businesses and critical entities.

**Bulgaria is also strengthening operational capabilities through investments in national cybersecurity infrastructure and coordination mechanisms.** Between April 2025 and March 2026, progress was

## Bulgaria

made in implementing the 'Enhancing national capabilities for coordination and response to cybersecurity incidents' project under the PRIDST. The project provides for the deployment of advanced cybersecurity monitoring and incident-response systems across 50 public administrations and the establishment of secure communication channels between authorities to improve coordination and information exchange on cyber threats.

**Targeted support has also been provided to businesses to improve cybersecurity readiness.** Under the initiative "Digital Bulgaria – SMEs", SMEs were given grants to strengthen cybersecurity infrastructure and adopt defensive technologies between June 2025 and March 2026. 61 financing contracts worth around EUR 1.8 million were concluded with SMEs, supporting investments in cloud-based cybersecurity solutions, hardware and software protection systems and improved information security management, including measures aligned with the NIS2 Directive.

**According to the 2026 Digital Decade Eurobarometer**, 91% of Bulgarian people feel it is vital to protect privacy and security online, and 88% support reinforcing cybersecurity and protection from online threats.

**2025 recommendation on cybersecurity:** Increase efforts in cybersecurity, particularly by supporting the development and deployment of cybersecurity capabilities, and by increasing awareness amongst private and public entities.

**In 2025, Bulgaria made some effort to address the recommendation through new policy actions.** The country strengthened its cybersecurity framework, by transposing the NIS2 Directive into national law, and continued to invest in national cybersecurity capabilities. However, cybersecurity preparedness remains very weak, especially among SMEs; the uptake of security measures is still the lowest in the EU, which is indicative of persistent gaps in awareness, skills and implementation capacity.

# Protecting and empowering EU people and society

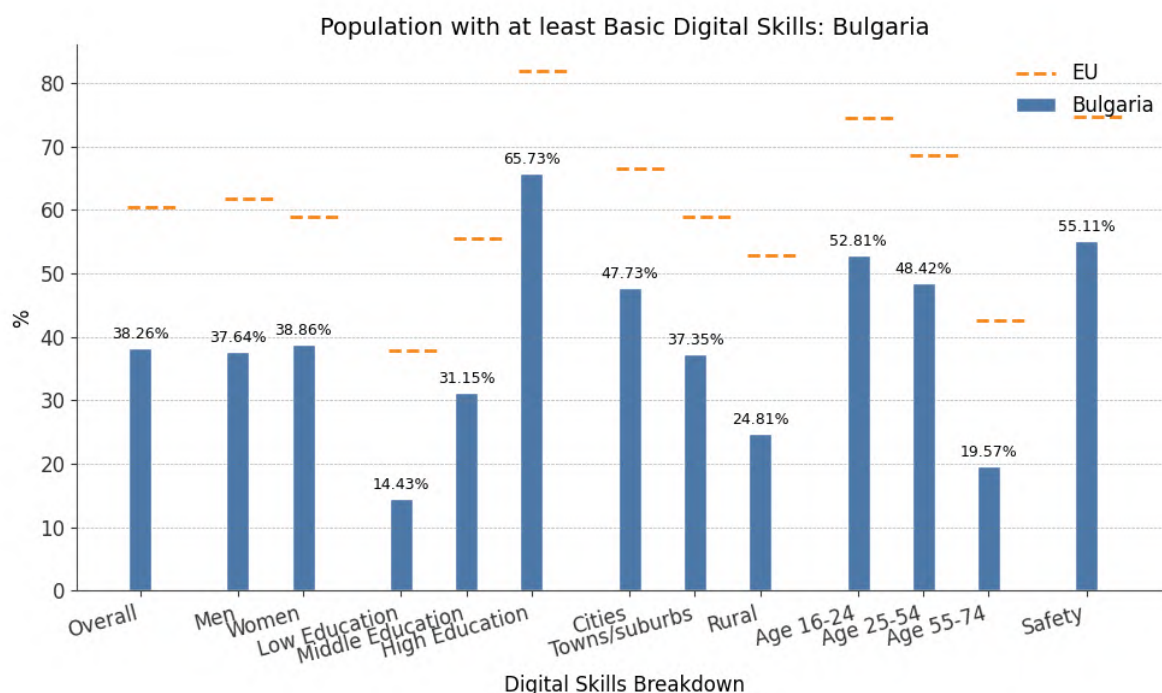
Empowering people and bringing the digital transformation closer to their needs

Equipping people with digital skills

*Basic digital skills*

Performance assessment

Bulgaria remains below the EU average in basic digital skills, with significant disparities across education levels, age groups and territorial areas. While some progress is visible, the overall level of digital skills and the uptake of advanced digital tools remain limited, suggesting that digital skills have yet to be adopted throughout society.



**In Bulgaria 38.26% of individuals aged 16-74 have at least basic digital skills, an increase of 3.8% annually since 2023, which is well below the EU average of 60.40%.** Its growth rate is also below the EU’s 4.3%, and the country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap. Above-basic digital skills are particularly low, at 11.77%, placing Bulgaria second to last in the EU.

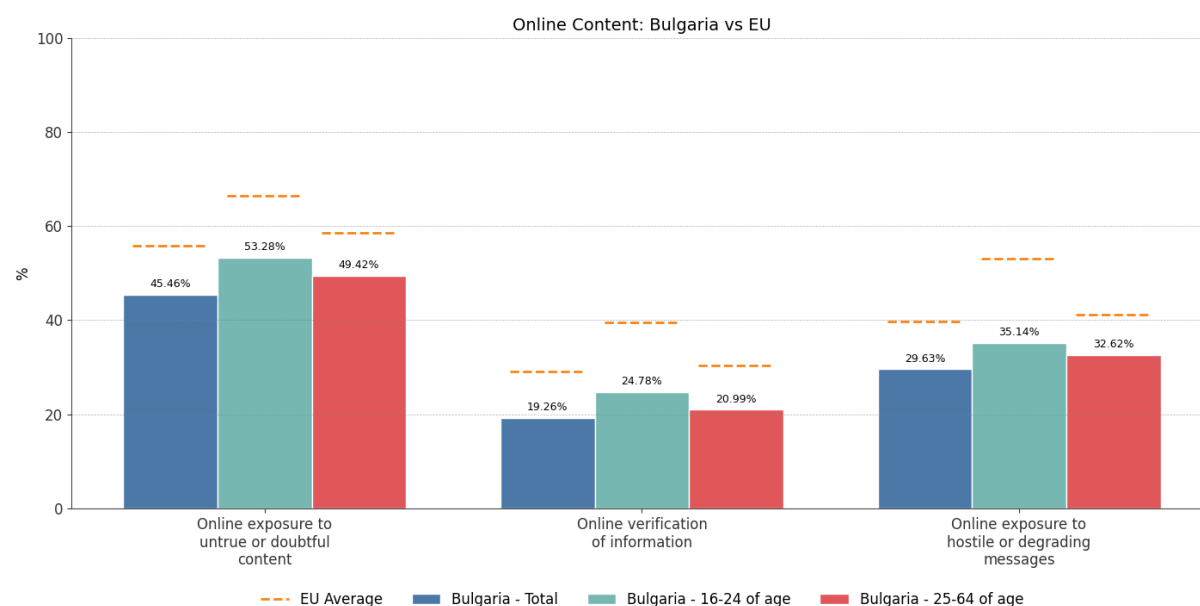
**Bulgaria has a small gender gap of 1.22 percentage points in favour of women, contrasting with the rest of the EU, where men are ahead of women.** However, education and territorial gaps are substantial: only 14.43% of individuals with no or low formal education have at least basic digital skills, and in rural areas the figure is only 24.81%, far below the EU average of 52.83%. The urban-rural gap stands at 22.92 percentage points (pps), above the EU figure of 13.67 pps.

The figure for young adults aged 16 to 24 is 52.81%, well below the EU average of 74.53%, while only 19.57% 55-74 age year olds have such skills, compared with 42.60% in the EU. The Digital safety skills score is poor, with 55.11% of individuals having at least basic safety skills, compared with 74.63% in the rest of the EU.

**Bulgaria is also lagging in the use of emerging digital tools:** 22.50% of Bulgarians used generative AI in 2025, below the EU average of 32.66%, and only 8.43% used it for work, compared with 15.36% in the EU. **Based on the results of the 2026 Digital Decade Eurobarometer**, according to Bulgarian users of generative AI tools, the most significant obstacles to the (increased) use of such tools are concerns about privacy or data protection (34%), concerns about accuracy or incorrect information (31%) and the lack of training or skills (28%).

## Online content behaviour and information resilience

Complementary indicators on online exposure to untrue or doubtful content, to hostile or degrading messages, and to online verification of information, provide additional context on information resilience and media literacy. Bulgaria's levels across all three indicators are below the EU average, but its growth is much faster, particularly among younger users. Age gaps are consistently smaller than in the EU.



In 2025, 45.46% of individuals in Bulgaria reported exposure to untrue or doubtful content online, below the EU average of 55.90% but increasing rapidly. Verification of online content remains limited, at 19.26%, well below the EU average of 29.16%, despite strong growth. Exposure to hostile or degrading messages stood at 29.63%, also below the EU average of 39.72%, but rising steadily. Younger users are more exposed to untrue or doubtful online content and hostile or degrading messages, and are also more likely to engage in content verification, although age gaps are generally narrower than at EU level.

**According to the 2026 Digital Decade Eurobarometer**, most Bulgarians (91%) consider that the EU should further strengthen the protection of children and young people online, while 81% agree that online manipulation poses a threat to democratic processes. The issues with the biggest personal impact are fake news and disinformation (57%), misuse of personal data (54%) and insufficient protections for minors (35%).

Overall, it is clear from the data that there is increasing exposure to online risks, but people are improving in their willingness to verify information. Stakeholders highlight growing concerns around disinformation, cyberbullying and harmful content, particularly affecting minors, which stakeholders consider an area where stronger digital literacy and education measures may be beneficial.

## Policy context and assessment of the recommendations

**Digital skills remain Bulgaria's main structural challenge**, with both basic and advanced skills levels among the lowest in the EU. Targeted investment in education, training, and lifelong learning is essential for digital inclusion and economic competitiveness.

**Bulgaria reports a range of EU-funded initiatives aimed at strengthening digital skills across the population, particularly through programmes supporting upskilling and reskilling.** These include investments in school education, workforce training and digital inclusion. Under the Human Resources Development Programme, operations such as 'Digital Skills' (EUR 20.5 million) 'New Skills' (EUR 38 million), and 'Qualification, Skills and Career Development of Employed Persons' (around EUR 62 million) support digital and green skills training for workers and businesses. Training courses are aligned with the DigComp framework and target basic to intermediate levels of digital skills.

**Delivery mechanisms are also expanding.** Under the RRF-funded measure on digital skills training and adult learning, more than 155 000 participants had completed training and obtained certificates by the end of 2025. Digital training has already been provided to more than 5 000 employed individuals through measures linked to a Human Resources Development Programme (HRDP), with a focus on basic and intermediate digital skills. In addition, contracts have been signed for over 1 300 RRF-funded digital clubs, which are expected to become fully operational by mid-2026 and aim to support digital learning and inclusion at local level.

**Policy measures increasingly target vulnerable groups**, including older people, individuals with low literacy levels, Roma communities, employees of SMEs and teachers.

**Despite these initiatives, Bulgaria continues to face structural challenges in translating programme-based support into improved Digital Decade outcomes**, for example regarding the proportion of individuals with at least basic digital skills and the supply of advanced digital skills. Industry stakeholders report that low levels of digital literacy across the general population and in certain sectors, including healthcare, continue to limit the effective use of digital tools and the uptake of digital public services. [Evidence](#) from the education sector suggests that while some teachers are highly motivated in this area, the integration of digital technologies such as AI remains fragmented and insufficiently supported at system level, arising from gaps in structured training and institutional coordination. Structural challenges in the education system, including low student motivation, early school leaving and persistent educational inequalities, also hinder the development of digital skills.

**Bulgaria increasingly positions itself as an attractive destination for digital nomads**, with its relatively low living costs and the widespread availability of high-quality internet connectivity. Following its accession to the Schengen area and the adoption of the euro in January 2026, the country introduced a dedicated residency regime targeting non-EU remote workers employed by foreign companies, further reinforcing its appeal to mobile professionals. These developments place Bulgaria in direct competition with other regional digital nomad hubs such as Greece, Croatia and Romania. In parallel, discussions on digital integration and sovereignty continue. Industry stakeholders point to ongoing

investments in European data infrastructure and the importance of maintaining cross-border digital connectivity while addressing sovereignty considerations.

**2025 recommendation on basic digital skills:** Leverage the strong performance of women in basic digital skills to reduce disparities linked to education, age, and geography, and to raise the overall level of digital competence. Prioritise targeted investments in teacher training, curriculum reform, and the development of digital and green skills.

**In 2025, Bulgaria continued the implementation of existing measures but did not take any new measure.** The country is determined to develop key skills in all stages of education, including higher education, and measures aimed at increasing the digital qualification of students and teachers are being implemented. But despite ongoing initiatives, performance remains weak and substantial disparities persist by education level, age and territory. Existing measures have not yet translated into sufficient progress in overall digital skills or into a meaningful reduction of inequalities affecting low-educated people, older adults and rural populations.

## *ICT specialists*

### *Performance assessment*

**Bulgaria has 4.8% of ICT specialists in full employment, after a 4.3% increase in 2025 (above the EU's annual progress of 2%), just below the EU average of 5.0%.** The country is on track according to its trajectory presented in the Digital Decade national roadmap.

**The proportion of Bulgarian women as ICT specialists has decreased slightly but remains above the EU average.** In 2025, women accounted for 25%, compared to the 19.5% in the rest of the EU.

**In 2024, Bulgaria had the lowest proportion of ICT graduates in the EU, at 4.7% of all graduates.** This low performance is concerning as a low proportion of ICT graduates makes it more difficult to bridge the gap in the training of more ICT specialists for the future workforce. In addition, the country has one of the EU's lowest proportions of STEM graduates (20.1%; EU average: 25.2%).

In 2024, 8.96% of Bulgarian businesses recruited or tried to recruit personnel with specialist ICT skills (EU average: 9.55%). Moreover, 3.68% of companies said they had difficulty filling vacancies for jobs requiring specialist ICT skills (EU average: 5.49%).

### *Policy context and assessment of the recommendations*

**Bulgaria has introduced several initiatives to improve the pipeline of ICT specialists through education, vocational training and labour market policies.** For the tenth consecutive year, the national Training for IT Skills and Career Programme supports the acquisition of professional qualifications in computer science and software-related occupations, with the objective of increasing the number of graduates entering the labour market or continuing higher education in informatics and computer science. The programme is implemented through a school–university–IT business partnership model, involving five School Centres for Software Training located in Sofia, Pravets, Plovdiv, Ruse and Burgas.

**Steps are being taken to smooth pathways into ICT professions.** In 2024, the Ministry of Education and Science approved a new List of Professions for Vocational Education and Training (VET),

introducing new programmes in fields such as database and network administration, software development, and electronics and automation, with training expected to begin in 2026. In parallel, advanced digital skills training for adults (DigComp levels 7 and 8) is supported through the Human Resources Development Programme (ESF+).

**In November 2025 reforms set up a structured cybersecurity qualification framework**, with the aim of strengthening the skills pipeline by defining standardised skills, training pathways and professional profiles, including both operational and strategic roles in cybersecurity management.

**These measures respond to increasing demand for ICT and cyber skills in the Bulgarian labour market**, where employers across the information technology sector and other economic sectors report shortages of trained specialists. At the same time, stakeholder consultations suggest emerging labour-market shifts linked to AI adoption, including a perceived reduction in demand for some entry-level programming roles and evolving skills requirements. According to the 2025 Public Administration [AI Readiness Index](#), a majority of surveyed public-sector employees reported a need for specialised training. Together, these trends underline the need to expand advanced digital skills provision, strengthen links between education and labour market needs, and boost structured training programmes covering practical and ethical aspects of AI use. This will in turn support public sector transformation and broader digital adoption.

Despite these initiatives, Bulgaria continues to face structural challenges in expanding the supply of highly specialised ICT professionals, which may hinder the adoption of advanced digital technologies across the economy.

**2025 recommendation on ICT specialists:** Develop clear, targeted measures to help companies hire ICT experts in less populated areas. Set out a strategy addressing broader factors like infrastructure, economic conditions, and researcher mobility, and identify the most effective funding strategies. Expand ICT training and increase the number of female ICT specialists to help close the gap.

**In 2025, Bulgaria made some effort to address the recommendation through new policy actions.** The country expanded ICT training and introduced new vocational and cybersecurity-related programmes. However, structural challenges persist in expanding the supply of highly specialised ICT professionals and in aligning skills provision with labour market needs. While recruitment is relatively high, this has not yet been reflected in a proportionate increase in the overall supply of ICT specialists, and the low proportion of ICT graduates continues to hinder the future pipeline. Available evidence does not indicate that existing measures have significantly improved the ability of firms, particularly in less populated areas, to attract and retain ICT specialists.

[Key digital public services and solutions – trusted, user-friendly, and accessible to all](#)

*Performance assessment*

**As regards digital public services, Bulgaria performs better for businesses than for citizens; in the case of the latter, it is below EU levels** and more uneven across life events and levels of governance. Differences across government tiers are also evident, with local administrations showing comparatively weaker performance, although trends suggest gradual improvement.

**In 2025, Bulgaria had a digital public services score of 71.08/100 points in the case of citizens, a 4.6% increase compared to 2024, but still below the EU average of 84.64/100.** The country is lagging behind its trajectory presented in the Digital Decade national roadmap. For national citizens, Bulgaria reached 88.21/100, below the EU average of 94.01/100, while cross-border digital public services for citizens reached 53.95/100, below the EU average of 75.28/100 despite a 12.8% increase. In addition, Bulgaria is not performing well on the indicator related to digitalisation of the justice system in the [EU Justice Scoreboard](#). It has suffered difficulties and delays with deploying the necessary decentralised IT systems that form the basis for the Justice Digital EXchange system (JUDEX), a key reform for the digitalisation of cross-border public judicial services.

**Citizen-related life events** that score particularly well include Transport (89.09), Moving (85.00), and Health (73.36). The areas most in need of improvement are Career (60.58), Family (61.72), and Studying (63.25). **In terms of the different levels of government for national citizens' digital public services**, central government services scored 86.27/100, regional services 79.63/100, and local services 60.96/100.

**Bulgaria's score for digital public services for businesses was 94.04/100 in 2025, unchanged from 2024 and above the EU average of 88.59/100.** The country is on track according to its national trajectory. Cross-border digital public services for businesses reached 92.50/100, above the EU average of 78.37/100, while the score for digital public services for national businesses was 95.59/100, below the EU average of 98.81/100.

**According to the 2026 Digital Decade Eurobarometer**, 72% of Bulgarians consider that the digitalisation of daily public and private services is making their life easier.

Bulgaria's access to e-Health records reached 89.56 in 2025, an increase of 2.4%, above the EU average of 86.51. While its annual progress is below the EU's 4.6%, the country is on track according to its trajectory presented in the Digital Decade national roadmap.

### *Policy context and assessment of the recommendations*

**Bulgaria's technological environment and legislative framework for e-government are well developed, yet there is limited uptake of digital public services.** Despite improvements in service availability, **challenges persist in their effective use.** Further progress could focus on broader access to health data, stronger data contributions across the healthcare system, improved support for vulnerable groups, and participation in emerging European initiatives such as the Network of AI-Powered Advanced Medical Centres. Stakeholder consultations identified barriers such as usability issues, non-user-friendly design and fragmented service interfaces. In addition, low awareness of available services and concerns relating to data protection and trust continue to deter user engagement. These factors highlight persistent demand-side barriers to the effective use of digital public services. In this context, the development of trusted digital identity solutions, including the future European Digital Identity Wallet (EUDI Wallet), can play a key role in strengthening user trust, facilitating access to services and supporting the integration of Bulgaria into the Digital Single Market.

**Progress is also ongoing in the area of digital identity and trust services.** Bulgaria has begun preparing for the implementation of the EUDI Wallet. The Ministry of e-Government has launched coordination with public institutions and trust service providers to prepare the technical specifications and legal framework required for its deployment. Discussions are also underway regarding legislative amendments necessary for the functioning of the future digital identity ecosystem. Stakeholders underlined the importance of timely implementation of digital identity solutions to enable secure

digital interactions and support the development of advanced digital services. They also highlighted the need to clarify roles and responsibilities among stakeholders and ensuring a coherent governance framework to support effective implementation.

Further progress will require prioritising the technical and operational preparations for issuing a national wallet, including the establishment of a clear certification framework and alignment with common European standards. Ensuring interoperability and the integration of the wallet with key public and private services will be essential to support uptake and enable seamless cross-border use. Continued participation in large-scale pilots and cooperation with European partners will contribute to knowledge exchange, scalability and the long-term development of a robust digital identity ecosystem.

**Despite these developments, the overall use of e-government services remains low.** This is compounded by a generally low perception of the quality of public administration services, particularly among citizens (as opposed to businesses). In the past 12 months, 40.02% of Bulgarian users have engaged with e-government services, well below the EU average of 76.03% and the second-lowest share in the EU, despite gradual improvements in service availability. Across auxiliary e-government indicators, Bulgaria's performance in 2025 was mixed but generally improving. It made progress in user support (89.68, up from 88.89 in 2024), slightly below the EU average (90.01), and a marked improvement in mobile friendliness (97.17 vs 90.54 in 2024), now in line with the EU average (97.35), despite the EU experiencing a notable decline in this area. However, Bulgaria continues to lag behind the EU average in both pre-filled forms (71.78 vs 75.93) and transparency (57.87 vs 69.59). Moreover, both indicators were down on the 2024 figures (74.13 and 59.31 respectively), falling further behind the EU as a whole, particularly in transparency of service delivery, design and personal data. Overall, while Bulgaria is making progress in aspects of user experience such as support and mobile access, structural gaps remain in more advanced features related to data reuse and transparency of digital public services.

By the end of 2025, 2 179 electronic services were available to citizens and businesses, of which 1 283 of were provided centrally through the e-Government portal and 1 035 of those can be requested via web-based electronic forms.

**Steps have been taken to reduce the administrative burden and to digitalise internal processes.** Under the RRP, Bulgaria is digitalising the construction sector, by introducing building information modelling and developing a platform for administrative services relating to spatial planning, investment design and building permits.

However, the digitalisation of the justice system falls well short of what is needed. Procedural rules do not yet allow the use of digital tools across all civil and commercial proceedings, and existing solutions do not fully enable secure communication and remote work for judges and court staff. It is also not possible as a citizen to initiate and follow court proceedings digitally in all cases. Gaps also remain in the deployment of the IT solutions necessary to support cross-border digital judicial cooperation and service delivery.

A great deal of work has been done to set up a fully electronic internal document flow for implementing all administrative procedures. By the end of 2025, internal electronic document flow was introduced throughout the central administration, and integrated into regional and municipal administrations. In addition, with the labour register reform, since 1 June 2025 all paper employment record books have been digitalised in the Employment Register maintained by the National Revenue Agency. **However**, while substantial progress has been made in the digitalisation of administrative

processes, including electronic document management and the labour register reform, **administrative capacity remains a major constraint**. Stakeholders reported limited administrative capacity and expertise in public institutions to engage effectively with industry on digital innovation projects. This is consistent with findings from the 2025 Public Administration [AI Readiness Index](#). Based on a survey of public-sector employees, the index assessed overall AI readiness at 49/100, corresponding to a 'capacity-building' stage, and highlighted challenges related to AI uptake, strategic planning, and organisational preparedness across public institutions. Together, these findings suggest that capacity constraints may hinder the co-creation of policies and slow the implementation of digital transformation initiatives supporting efficient digital public services.

**Interoperability and data exchange systems for online public services continue to improve**. Further progress in enabling cross-border data exchange between public authorities, for example through the Once-Only Technical System, would help facilitate administrative procedures for citizens and businesses working across borders.

RegiX allows administrations to receive the necessary information *ex officio* without requiring documents from citizens and businesses. By the end of 2025 100 registers were connected to RegiX and there were 288 available queries. Interoperability improvements include the development of the information system for centralised building and maintenance of registers. Ten registers have been built and published in a production environment based on this system.

**In parallel, broader data governance reforms are being implemented**. For example, a reform aiming to build a strategic, organisational and technical framework for data governance and interoperability is being implemented under the [Programme Research, Innovation and Digitalisation for Smart Transformation \(PRIDST\)](#).

**Bulgaria is progressing towards achieving universal access for citizens to their electronic health records by 2030, as this year's improved score demonstrates**. However, medical images are still not available to citizens online, while geriatric nursing homes are not supplying data mainly because of their low level of digitalisation. In 2020, Bulgaria adopted the Concept for the Development of AI in Bulgaria by 2030, which recognises the potential of AI in healthcare. Health is also a crucial sector recognised in the Apply AI Strategy, yet AI adoption and integration in healthcare remain limited and uneven. **To date, no Bulgarian organisations have joined the Network of AI-powered Advanced Medical Centres**, which aims to speed up the introduction of innovative solutions for prevention, early detection and diagnosis in cancer and cardiovascular disease. Moreover, the cross-border harmonisation, secure storage, processing, and analysis of health data for high-impact use cases is supported by federated infrastructures and governance. However, **Bulgaria has not yet appointed a representative to either the Genome EDIC Working Group or the EUCAIM (Cancer Imagery) EDIC Working Group**.

Further progress will require making additional data types, in particular medical images, available to citizens online, and increasing the supply of health data by ensuring that public and private geriatric nursing homes are connected to digital systems. Expanding population coverage and enabling people (subject to authorisation) to access electronic health data on behalf of others would also support more inclusive access. In parallel, developing safe and trustworthy AI in healthcare will require clearer investment priorities and support for the deployment of AI solutions in clinical environments, including through participation in European initiatives such as the Network of AI-powered Advanced Medical Centres.

**Bulgaria's healthcare system is undergoing a digital transformation** through system-wide reforms supported by the RRP and cohesion policy. The eZdrave [which means e-Health in Bulgarian] mobile application provides real-time access to health data (examinations, referrals, prescriptions and hospital stays) and is supported by a national awareness-raising campaign, reaching over 80 000 people. The application had 350 389 active users as of 4 May 2026. In 2024, amendments to the Public Health Act had introduced mandatory e-Health records across both public and private sectors, establishing a unified digital health profile for each citizen. The reforms also formalise telemedicine and introduce a national online appointment system. These measures build on the National Health Information System, which already manages large volumes of electronic prescriptions and referrals.

Recent reforms have contributed to a growing use of digital health services, including electronic prescriptions, referrals and access through the eZdrave platform. However, broader citizen uptake remains below the EU average in several areas, indicating persistent challenges related to digital inclusion and user engagement.

According to the European Commission's 2025 edition of [Country Health Profile for Bulgaria](#) under the State of Health in the EU, only around 40% of individuals sought health information online in 2024 (EU: 58%), and 18% have booked medical appointments online (EU: 40%). Access to electronic health records increased from 10% in 2020 to 19% in 2024, still below the EU average (28%).

**Significant inequalities persist, particularly by education level.** Gaps in digital health use are wider than the EU average, with much lower access and usage among less-educated groups. This indicates that beyond infrastructure and legislation, digital inclusion and literacy remain key challenges. Stakeholders also report that limited access by private sector actors and researchers to secondary health data, including anonymised datasets, may constrain the development of digital health and AI solutions, despite the existence of centralised health information systems.

**2025 recommendation on key digital public services:** Continue the efforts to improve the digitalisation and user-friendliness of public procedures and to reduce the administrative burden, also by expanding the use of eID. Address the persisting societal and regional imbalances in the delivery of online services by, for example, cooperating with local stakeholders. Focus on accelerating the number of digital public services for citizens, particularly in cross-border services.

**2025 recommendation on e-Health:** Ensure the timely and full availability of all types of medical images via the e-Health platform and app and provide clear information to the public. Expand online access to e-Health data to the entire population. Introduce technical functionalities that authorise persons to access this data on behalf of others. Strengthen communication to raise awareness of platform functionalities, especially among vulnerable groups.

**Key digital public services: In 2025, Bulgaria made some effort to address the recommendation through new policy actions.** The country continued to expand digital public services and advance interoperability and digital identity preparations, including steps towards the EUDI Wallet. However, despite continued improvements in the availability of digital public services and comparatively strong performance in services for businesses, citizen uptake remains low. While Bulgaria scores above the EU average for digital public services for businesses, services for citizens continue to lag behind the EU average and challenges remain regarding transparency, administrative simplicity and some aspects of user experience. Challenges also persist in the digitalisation of justice services, particularly regarding the availability of fully digital procedures for citizens and the deployment of

IT solutions supporting cross-border judicial cooperation. There are also significant regional and local disparities.

**E-Health: In 2025, Bulgaria made some effort to address the recommendation through new policy actions.** The country continued to develop its e-Health infrastructure, including the expansion of electronic health records and the eZdrave application. However, challenges remain in ensuring the full availability of functionalities, in particular access to certain data types such as medical images, and the interoperability and effective use of digital health services. Incomplete data contributions from parts of the healthcare system, including long-term care providers, continue to limit coverage. Uptake remains limited and uneven, particularly among vulnerable groups, reflecting persistent gaps in accessibility, awareness and digital inclusion, and disparities in usage across population groups. Remaining priorities include broader access to health data, stronger data contributions across the healthcare system, support for vulnerable groups, and participation in emerging European initiatives such as the Network of AI-Powered Advanced Medical Centres.

## Leveraging digital transformation for a smart green transition

**Bulgaria's ICT sector has a relatively limited environmental footprint and performs well in the recycling and reuse of electronic waste.** In 2022, air emissions from the ICT sector amounted to 5.8 kg of CO<sub>2</sub> equivalent per capita, significantly below the EU average of 22.8 kg. The sector represented 0.07% of total national air emissions, compared with an EU average of 0.35%, indicating a comparatively low environmental impact of ICT activities in the Bulgarian economy, which may also reflect the relatively limited size and scale of ICT activities in the country.

The structure of ICT-related emissions also differs from the EU average. In Bulgaria, ICT manufacturing accounts for only 2.2% of emissions within the ICT sector, compared with an EU average of 18.2%, reflecting the country's relatively limited domestic ICT manufacturing base. As a result, **the vast majority of ICT-related emissions (97.8%) originates from ICT services.**

At the same time, **Bulgaria performs strongly in the management of electronic waste.** In 2023, 86.37% of ICT-related waste collected (corresponding to two categories of waste electrical and electronic equipment) was recycled or prepared for reuse, well above the EU average of 80.23%. This comparatively high recovery rate provides a solid foundation for developing more circular approaches to digital technologies and electronic equipment.

**Overall, the currently low emissions footprint of the ICT sector, combined with strong recycling performance, will help Bulgaria to support a greener digital transition.** As digital technologies continue to spread across the economy, it is crucial to maintain this low environmental footprint while boosting digital infrastructure and services.

**As for citizens' perceptions (set out the 2026 Digital Decade Eurobarometer),** 44% of Bulgarians consider that green digital technologies (e.g. energy-saving technologies) will have a very positive impact in the next 10 years. In addition, 72% of respondents agree that AI must be developed in an environmentally sustainable way.

**2025 recommendation on Green and digital transitions:** Set up clear mechanisms for measuring and promoting the environmental benefits of digital solutions across sectors. Work towards fully integrating green and digital priorities into the country's development strategy, through better alignment between political agendas, funding allocation, and private sector engagement.

**In 2025, Bulgaria continued the implementation of existing measures but did not take any new measures.** While progress continues in areas such as electronic waste management and circular-economy practices, there is still no clear framework for measuring the environmental impacts and benefits of digital technologies or for systematically integrating green and digital priorities into broader policy and investment planning.

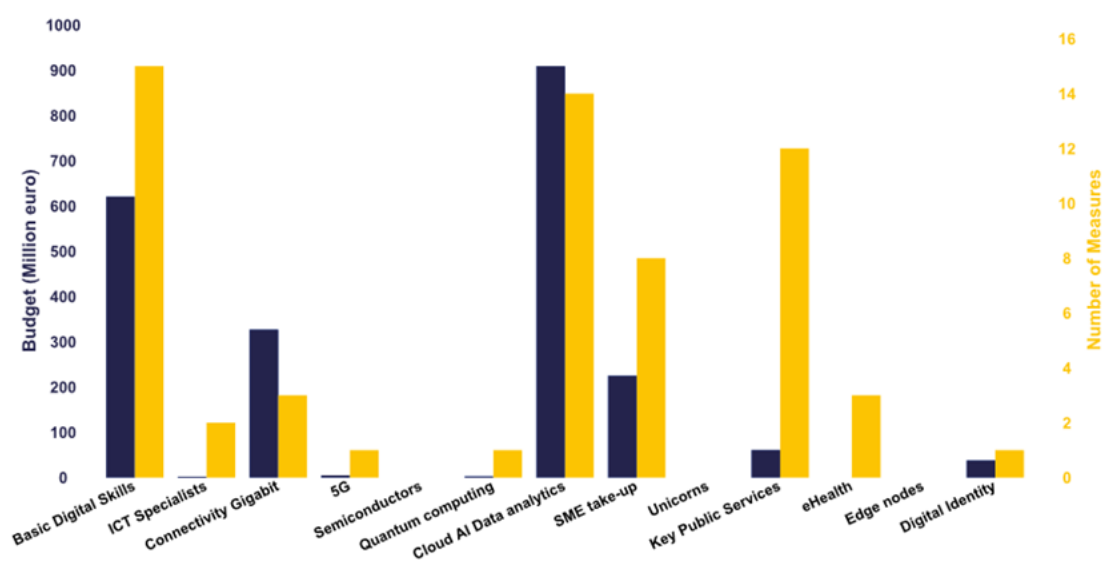
## Annex I: National roadmap analysis

### Bulgaria's national Digital Decade strategic roadmap

Bulgaria did not submit a revised national [Digital Decade roadmap](#) and did not provide a formal adjustment to address the roadmap recommendations issued in 2024. The 2024 recommendations for Bulgaria focused on the following areas:

- **Targets:** (i) Provide national targets for the following KPIs: unicorns, edge nodes and eID; (ii) Present national projected trajectory for unicorns; (iii) Align the level of ambition of the national targets for basic digital skills, ICT specialists, digitalisation of SMEs, uptake of advanced technologies (cloud computing, AI, data analytics) by businesses.
- **Measures:** (i) Clarify the budget description of all presented measures, highlighting EU sources such as the Recovery and Resilience Facility (RRF); (ii) Indicate clearly whether the measures are investments or reforms; (iii) Include more targeted, specific measures and policies that contribute to synergising the digital transformation and the green transition; (iv) Provide more information on the implementation of digital rights and principles (and Digital Decade general objectives), including what national measures contribute to it.
- **Consultation:** Report the results of the consultation process in more detail, including more information about the stakeholders invited.

Measures and budget in the national roadmap<sup>3</sup>



Bulgaria's roadmap is composed of **60 measures** and its budget stands at EUR 2.19 billion (equivalent to 2.11% of GDP). It is largely unchanged, with no new measures introduced. Minor adjustments were made, including [updates](#) to timelines and corrections of clerical errors, accompanied by targeted written responses to the Commission. Overall, the response to the 2024 recommendations chiefly comprises clarifications and references to existing measures rather than

<sup>3</sup> When referring to national roadmaps, data used in this report are those declared by the Member States in their national roadmaps, on the basis of the Commission's guidance (C(2023) 4025 final). Data might reflect possible variations in reporting practices and methodological choices between Member States. No systematic assessment of the extent to which Member States followed the guidance was carried out.

substantive updates to the roadmap. Trajectories and measures are mostly based on the national RRP and other EU programmes, and are therefore not expected to change in the short term. Bulgaria's written feedback addressed most of the SDD24 recommendations, primarily through clarifications or references to existing measures.

Bulgaria provided detailed information on stakeholder consultation, involving an advisory council of over 35 ICT sector representatives under the Ministry of Electronic Governance, and input from a broad range of national institutions. The roadmap and related strategic documents were drawn up in conjunction with stakeholders including ICT organisations and sectoral actors, and were subject to public consultation prior to approval, with feedback taken into account.

Bulgaria clarified the budget description of measures and highlighted EU funding sources, including the RRF, in line with the 2024 recommendations. However, the level of ambition remains constrained, as measures are tied to existing funding cycles up to 2027 and may only be adjusted in the context of future EU programmes.

In terms of governance, Bulgaria continues to demonstrate commitment to the Digital Decade objectives and remains committed to the Digital Transformation of Bulgaria 2024–2030 framework. This year, the Ministry of Electronic Governance plans to present its new National Strategy for the Digital Transformation of the Republic of Bulgaria 2026–2030, currently under development and stakeholder consultation, and outlining priorities related to digital infrastructure, public sector modernisation, digital skills and data-driven innovation. While this strategy is set to provide a forward-looking policy direction and is designed to align Bulgaria's digital development with the Digital Decade 2030 goals, it is not yet formally integrated into the national Digital Decade roadmap or reflected in the measures submitted.

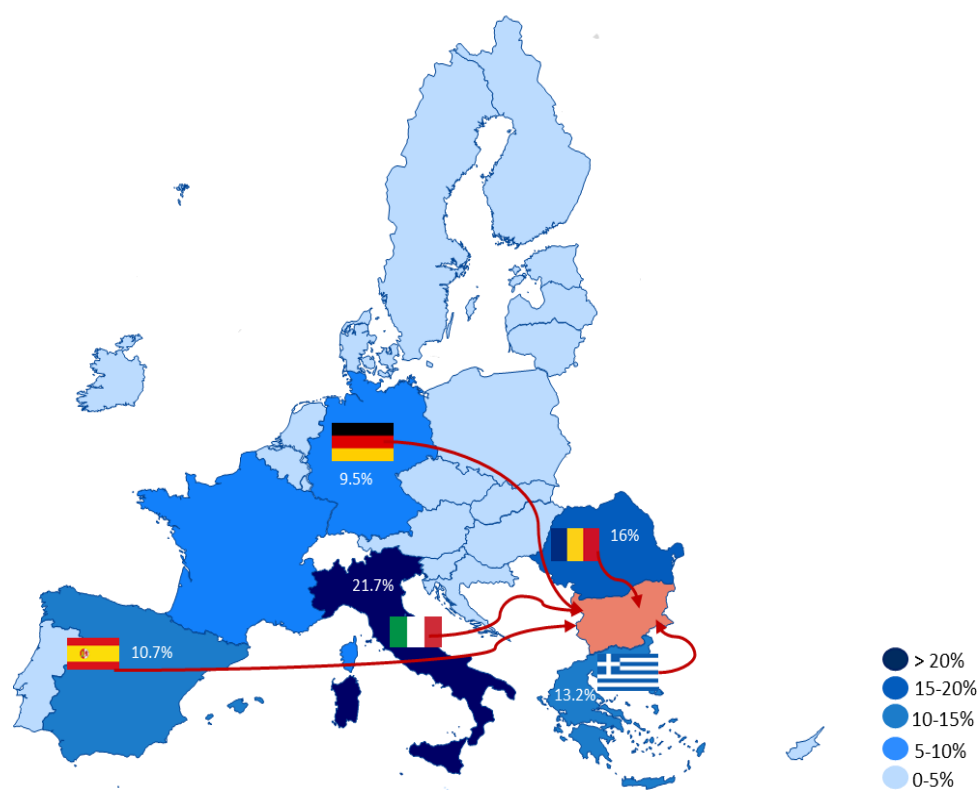
In addition, Digital Decade objectives are promoted at both national and regional levels, including through the Digital Decade Council and cooperation with municipalities. Bulgaria also contributes to regional initiatives, including digital cooperation in the Balkan region.

## Annex II: Funding, economic impacts & Multi-Country Projects

*Country results from the study 'Assessing the Economic Impact of Digital Investments under the Recovery and Resilience Facility'*

A modelling study conducted by the European Commission services, with the FIDELIO model, assesses the economic impact of the digital component of the RRF. As of November 2025, the digital part of the Recovery and Resilience Plan of Bulgaria was evaluated to EUR 1.17 billion with EUR 273 million for digital infrastructures, EUR 249 million for digital skills, EUR 123 million for the digitalisation of businesses, EUR 167 million for the digitalisation of public services, and EUR 357 million for other digital priorities.

The total economic impact of RRF digital measures is estimated to EUR 934 million for the national economy. Of this, EUR 673 million stems from the direct effects of Bulgaria's own RRP and EUR 261 million corresponds to spillover effects from the implementation of other EU Member States' plans. Bulgaria benefited the most from spillover effects from RRFs of Italy (EUR 57 million), Romania (EUR 42 million), Greece (EUR 34 million). The most impacted sectors are ICT Services (EUR 334 million), Manufacturing (EUR 125 million), and Education (EUR 88 million).



RRF spillover effects to Bulgaria

## *Funding from the Recovery and Resilience Facility (RRF) & Cohesion Policy*

Bulgaria allocates close to 21% of its total RRP (EUR 1.2 billion)<sup>4</sup> to the digital sector. Under cohesion policy, EUR 1.2 billion, 11% of the country's total cohesion policy funding, is dedicated to advancing Bulgaria's digital transformation<sup>5</sup>.

## *Multi-Country Projects*

Bulgaria is a member of the Alliance for Language Technologies EDIC, and is a participating state of the EuroHPC JU and of the Chips JU.

---

<sup>4</sup> The proportion of financial allocations that contribute to digital objectives has been calculated using Annex VII to the Recovery and Resilience Facility Regulation. Last data update: 23 April 2026.

<sup>5</sup> This amount includes all investment specifically aimed at or substantially contributing to digital transformation in the 2021-2027 cohesion policy programming period. The source funds are the European Regional Development Fund (including Interreg), the Cohesion Fund, the European Social Fund Plus, and the Just Transition Fund.