ithra DigitalWellbeing

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Country Report

Bulgaria

Country insights report 2024

sync

Bulgaria

Overall score
57.2 (out of 100)

Placed
21st (out of 35)

The Digital Wellbeing Index (DWI) presents a mixed picture of the country's digital landscape. With an overall score of 57.2, Bulgaria ranks 21st among the 35 countries examined. A strong performance in the "Capturing opportunities" pillars (especially a strong connectivity), is offset by areas for improvement in the "Balancing needs" pillars, such as mental health, physical health and access to goods and services.

With an overall index score of 57.2, Bulgaria is on par with the DWI average (57.2) and below the index leader Canada (69.8). In Europe, Bulgaria showcases room for improvement, scoring below the regional average of 62.2.

Comparative performance in the DWI

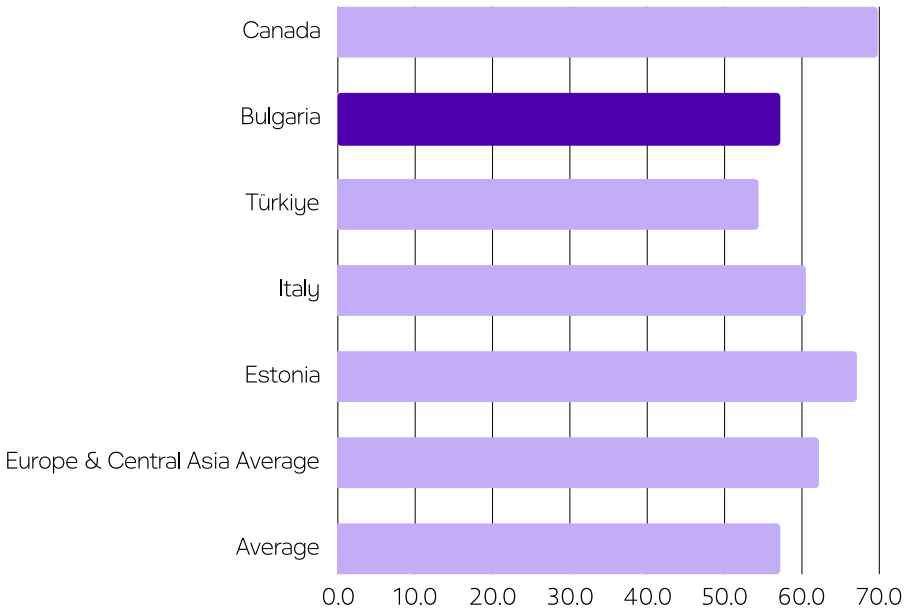


FIGURE 1

Source: Global Digital Wellbeing Index 2024

The context of digital wellbeing in the country

The Bulgarian government have shown a commitment to ensuring the digital wellbeing of their citizens and that the digital environment they exist within is connected and secure. In 2019, the Bulgarian Ministry of Transport, Information Technology and Communication of Bulgaria announced the 'Digital Bulgaria 2025' programme. This was an extension of the 'Digital Bulgaria 2015' programme which focused on areas in digital skills, internet usage and business adoption of digital technologies. The programme had success in many areas of digital penetration, connectivity and promotion of e-commerce, for instance, mobile broadband subscriptions increased in Bulgaria from 13% of the population in 2009 to almost 29% in 2019.

However, certain domains need further development to match regional levels. For example, the proportion of people with at least basic skills in the field of digital technologies amounts to around 29%, while on average for the EU, this share is 57%. This trend was also confirmed among young people: 54% of young people between the ages of 16 and 24 have at least basic digital skills, with an EU average of 81%. Therefore, the 2025 programme was focused on improving digital competence and skills. This was alongside other digital goals, such as creating an environment for the widespread use of new technologies in business and creating a safe and secure digital ecosystem.

In July 2020, the Council of Ministers of the Republic of Bulgaria approved the National Strategic Document 'Digital Transformation 2020-30 Programme' focusing on digital transformation for growth. This incorporated the 'Digital Bulgaria 2025' programme and how it can be used to foster the development of the Bulgarian society economy in order to catch up with its European counterparts. Moreover, in December 2020 Bulgaria's Ministry of Transport, Information Technology, and Communications (MTITC) recognised the need to prepare its economy for AI, producing a document on the "Concept of the development of Artificial Intelligence in Bulgaria until 2030". This will be an important factor in societal progress and the general future wellbeing of Bulgarian citizens.

Bulgaria has also invested time into improving its digital wellbeing services, outlining a national e-Gov and e-Health Strategy 2014-2020, which led to an increase of people using the internet to interact with public institutions from 10% in 2008 to 22% in 2018. This success was followed by a push to digitalise government service through the Electronic Government Development Strategy of the Republic of Bulgaria and the Electronic Government Act 2019. This effectively pushed to unify e-Gov services including mandatory use of digital services by civil services and administrative bodies, as well as strengthening the access citizens have to e-Gov services. Bulgaria's dedicated digital initiatives, such as 'Digital Bulgaria 2025' and 'Digital Transformation 2020-30,' emphasize enhancing digital wellbeing, ensuring a connected and secure environment for its people's prosperous future.

The country's strengths and areas for improvement

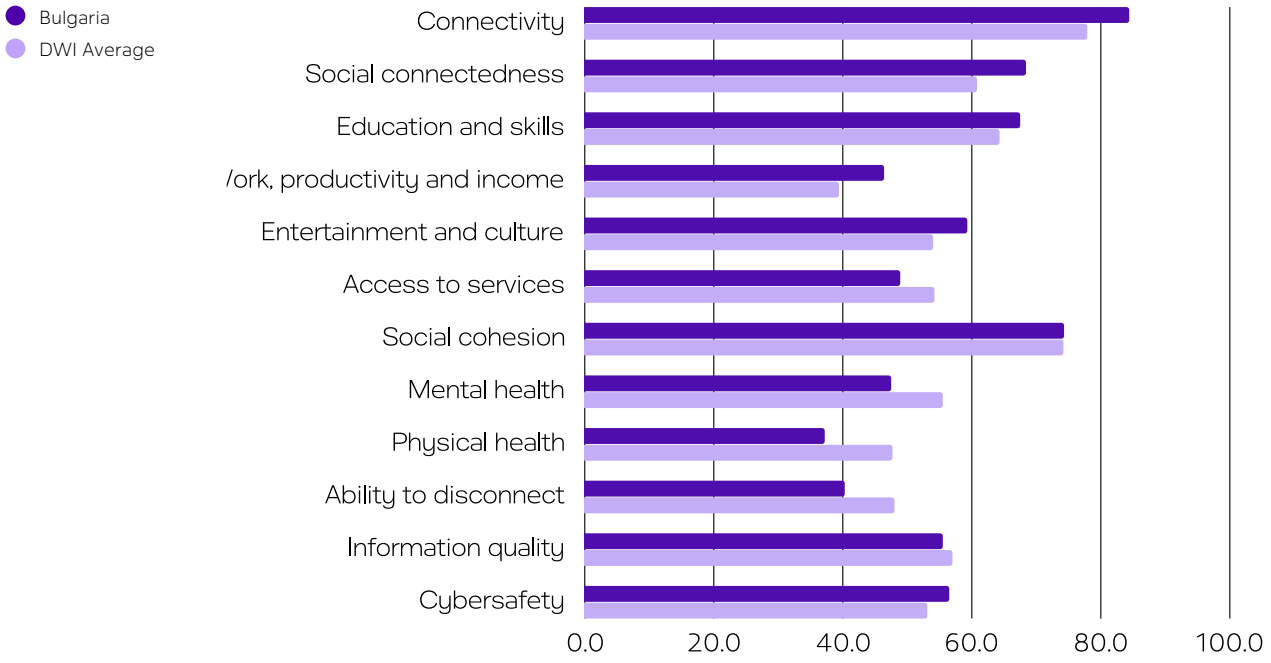
Bulgaria's strength exists mainly within the Capturing opportunities sub-index and specifically with the high social connectedness score of 68.4 (placed 3rd out of 35). This reflects a strong digital community, presenting opportunities to stay connected with family and friends as well as wider social and professional networks. This is supported by a relatively strong connectivity, scoring 84.4 (placed 7th out of 35), which signifies more general access to technology through widespread internet availability and penetration. Bulgaria also performs above average in cybersecurity, signifying that the internet in the country is a safe environment to operate in. This is vital to create a productive and inclusive digital space that can be used by all.

Despite this, Bulgaria performs below average on the access to goods and services pillar (placed 27th out of 35). Access to services such as health care and finance are vital for life convenience and present an opportunity to improve the productivity of Bulgarian citizens. The index also suggests areas for improvement in mental health (placed 31st out of 35) and physical health (placed 30th out of 35) linked to online usage. Both areas are vital to be improved in order to protect the health of the Bulgarian population in the face of an increasingly digitalised society.

FIGURE 2

Source: Global Digital Wellbeing Index 2024

Performance of Bulgaria by index pillars compared to DWI sample



Overall performance by index pillars

TABLE 5 Source: Global Digital Wellbeing Index 2024

Dimensions	Score (0 to 100)	Placed (out of 35)	Key findings
Connectivity	84.4	7	High 4G coverage and internet affordability complements a moderate 79.1% of the population using the internet.
Social connectedness	68.4	3	High numbers of social media accounts and local social engagement platforms exist. However only 45.6% of survey respondents actively engage with social media and 43.5% used it to engage in an important issue to them.
Education and skills	67.5	13	81% of survey respondents use digital devices to access information. There is also a strong recognition of micro credentials. While digital technology is important to survey respondents to access education, only 18.6% of survey respondents reported using a digital device to access online learning.
Work, productivity and income	46.4	10	Survey respondents reported moderate uses of technology to enable work including automating tasks and looking for a job. Remote workers are recognised in law and there is flexibility in working arrangements, however there is no digital nomad visa yet.
Entertainment and culture	59.3	12	The government provide strong incentives to promote tourism and culture in the digital space. However digital art and culture consumption is low, with only 34.9% of survey respondents claiming to have used a digital device to engage with creative content.
Access to services and goods	48.9	27	Digital devices have had low integration into healthcare, with only 20.4% of survey respondents using a digital device to consult a health professional. Moreover, the access to the e-government means of 48.3 was far below in the index average of 66.
Social cohesion	74.3	16	Work can be done in ensuring a regulatory framework for ICT access for persons with disabilities. Moreover, digital social inclusion scores are on the lower side, meaning digital payment uptake is biased towards the poorer members of society. The number of women that use the internet compared to men is also below average. However, there is a strong promotion of digital learning outside formal education.
Mental health	47.5	31	Policies to support mental health can be improved, with survey respondents indicating a lack of recognition of online addiction and support. Survey answers suggested high levels of excessive online activity such as binge eating and gaming.
Physical health	37.2	30	Significant work can be done on the physical impacts of excessive online use. Survey answers indicated a high level of unhealthy physical symptoms of excessive online use including 53% of respondents claiming visual and headache symptoms.
Ability to disconnect	40.3	19	No law is currently in place to respect the right to disconnect. However, survey respondents reported average levels of disconnecting from digital technology.
Information quality	55.5	18	While there is fairly strong trust in the information online, only 47.4% of survey respondents check the information they find online using multiple sources.
Cybersafety	56.5	11	The government has created policies that protect cyber safety and data privacy. This is offset by low data protecting skills and 74.6% of respondents claiming to have experienced cyberbullying.

Suggestions that may contribute to improvements across the digital ecosystem:

Rebalancing digital competence between demographics
Provide information and education to women so that the digital gender gap can be reduced. Moreover, this requires women to have access to digital services, where work is already being done within the Digital Bulgaria 2025 programme. Additionally, this programme will support the lower number of poorer citizens who access digital services. Schemes that promote access to more affordable digital services such as investment in library computers can help rebalance the digital services access.

Greater access to government and health services
Widening knowledge of e-Gov and e-Health services through public campaigns and incentives to use digital services over more traditional phone or paper methods such as improved waiting times. Efforts should be focused on older generation and regional areas as these demographics are slower to adopt such methods. Furthermore, these initiatives may be combined with the availability of desired services on a digital platform, although initiatives like 'Electronic Government Development Strategy of the Republic of Bulgaria and the Electronic Government Act 2019' show that work is already being done in this area.

Mental and physical health education and access to support
Introducing greater education around the negatives of unhealthy digital consumption, including excessive screen time. Public campaigns can highlight the importance of reduced screen usage and link them to longer-term health issues. Furthermore, awareness can be linked to the availability of support for those who develop an addiction related to digital practises such as gambling or gaming. Services can be made available using the new e-Health government initiatives that make securing health support much easier for the Bulgarian population.

Create and foster online learning programmes
Further comprehensive support for initiatives that provide education online, following on from the "modernization of higher education institutions" policy. While this programme focused on higher education, digital content may be created for younger children to support their e-learning and nurture their digital competency. Moreover, educational e-learning can be created to up-skill adults in other digital fundamentals that have demonstrated lower scores in this index, such as fact checking online sources and keeping personal data secure from criminals.

Global Digital Wellbeing Index Executive Summary

Digital technologies have reshaped how we connect, work, and perceive the world. As our dependence on these tools grows, so too does the need to understand and optimize the balance between technology use and wellbeing. The Global Digital Wellbeing Index (DWI) explores the foundational elements of digital wellbeing, acknowledging the complex and multifaceted dimensions involved. The DWI aims to stimulate global discussions, influence policymakers, and provide a benchmark for stakeholders to navigate the evolving landscape of digital wellbeing. It covers 35 countries and combines data from well-established secondary sources (e.g. UN, World Bank), a dedicated survey, and policy assessments into a framework that consists of 12 pillars, organized into two complementary components or sub-indices (1) balancing needs and (2) capturing opportunities. The DWI provides overall country-level scores out of 100, as well as scores for both components and for each of the 12 pillars (also out of 100).

In terms of overall scores on the index, Canada, Australia, Singapore, Estonia, France, the United Kingdom, Germany, the United States, and Italy do especially well. China stands out with a strong performance among middle-income countries. While wealthier countries achieve the best scores on average, having a higher income does not always guarantee a better performance: for example, China, Argentina, Colombia, Malaysia, Mexico, and Bulgaria achieve scores equal to or above the global average (57 out of 100). Across the entire sample, the pillars with the highest scores are connectivity (78) and social cohesion (74). Those with the lowest scores, requiring the most attention, are work, productivity and income (39), physical health (48), and the ability to disconnect (48). As highlighted throughout this report, each country has its relative digital wellbeing strengths as well as areas for growth and enhancement.

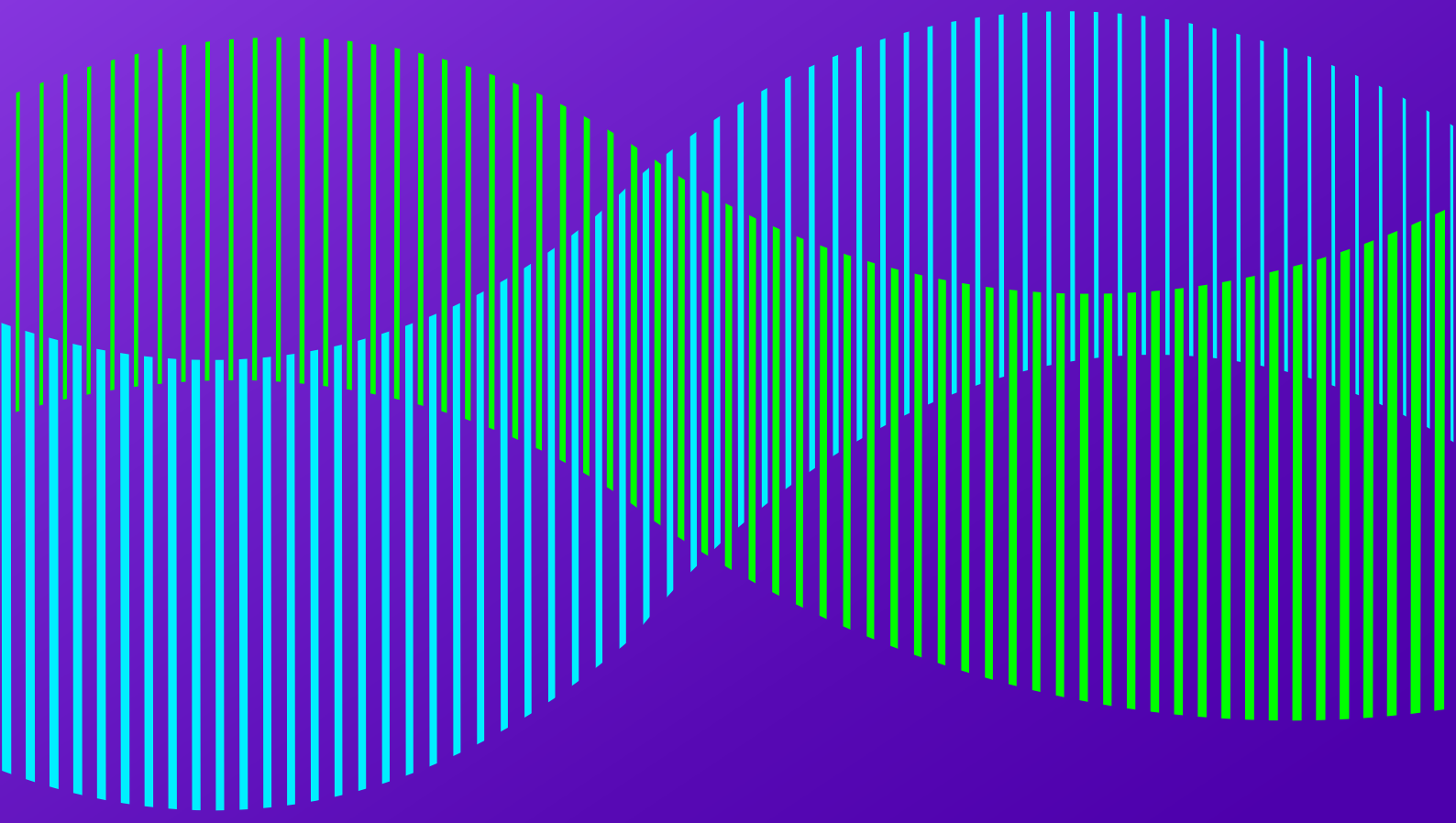


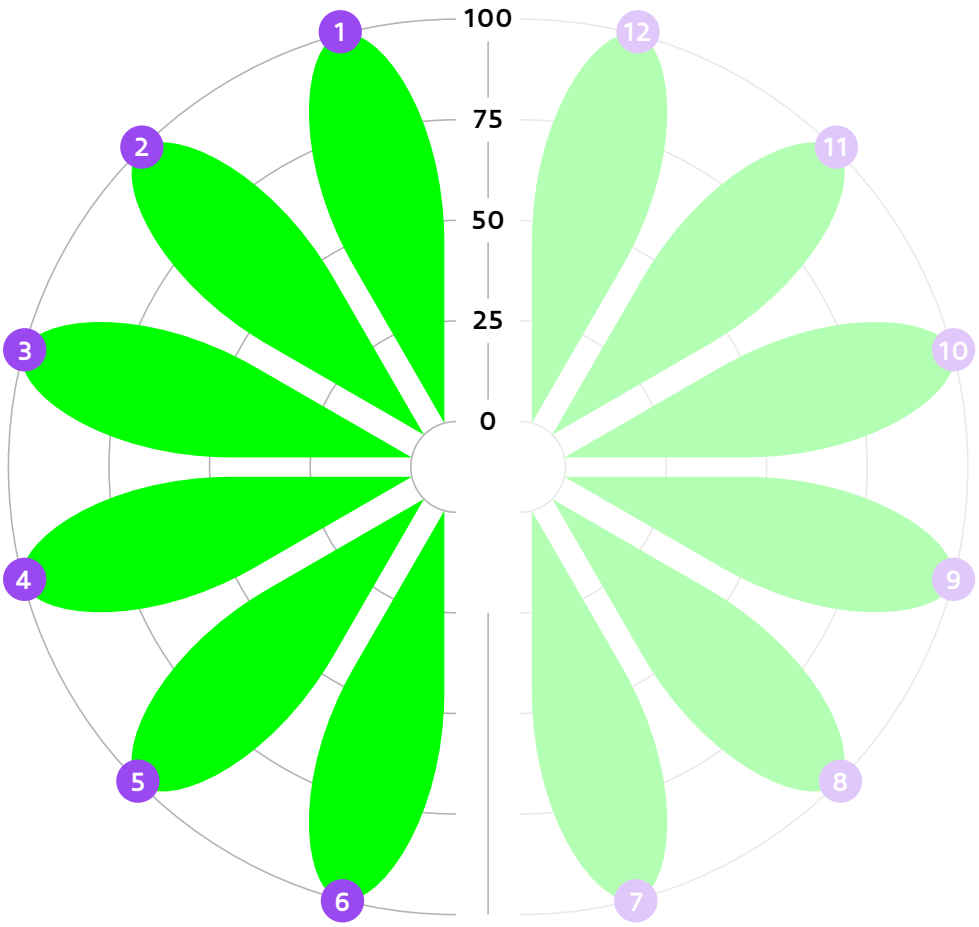
TABLE 1
Source: Global Digital Wellbeing Index 2024

Overall performance in the DWI

Rank	Country	Score (0-100)
1	Canada	69.8
2	Australia	69.0
3	Singapore	68.1
4	Estonia	67.1
5	France	66.8
6	United Kingdom	66.3
7	Germany	65.2
8	United States	61.0
=9	China	60.5
=9	Italy	60.5
11	Argentina	60.2
12	Sweden	60.2
=13	Chile	59.6
=13	Korea, Republic of	59.6
15	Colombia	58.1
16	United Arab Emirates	57.9
17	Malaysia	57.8
=18	India	57.5
=18	Japan	57.5
20	Mexico	57.4
21	Bulgaria	57.2
22	Brazil	55.1
=23	Indonesia	54.5
=23	Kenya	54.5
25	Türkiye	54.4
26	Viet Nam	54.1
27	Saudi Arabia	53.8
28	South Africa	53.0
29	Ghana	50.6
30	Kuwait	50.0
31	Nigeria	48.4
32	Egypt	46.6
33	Pakistan	45.1
34	Bangladesh	44.1
35	Algeria	39.8

Balancing Needs

The "Balancing Needs" sub-index includes six pillars examining the risks posed by digital technology and to what extent these risks are being addressed. This component of the DWI captures the most direct action being taken around the world to support digital wellbeing.



1 Social Cohesion
2 Mental Health
3 Physical Health
4 Ability to Disconnect
5 Information Quality
6 Cybersafety
7 Connectivity
8 Social Connectedness
9 Education and Skills
10 Work, Productivity, and Income
11 Entertainment and Culture
12 Access to Services and Goods

For the Balancing Needs component, data collected for the DWI reveals:

Policies to support digital mental health can help vulnerable individuals — an area with the potential to be improved across the board.

Singapore leads in the mental health pillar, followed by the United Kingdom and the Republic of Korea. Generally, advanced economies have better scores, but China and Algeria stand out among middle-income nations. Only eight countries have complete frameworks for digital mental health — that is, the use of digital technology to directly support mental health care and service provision — with Singapore, the United Kingdom, and Canada showcasing successful integration into education. Bangladesh, India, and the United Arab Emirates report greater levels of distress associated with extended digital technology use, while the United States, Australia and Canada report the most significant psychological impacts such as feelings of loneliness and anxiety linked with remote working or studying. Less affluent countries report lower levels of such distress, potentially due to less common remote activities, which can be linked to connectivity gaps and lower flexibility of work arrangements.

Maintaining physical health is a challenge given growing exposure to digital technologies, stressing the need for more dedicated policies.

Canada, France, and Australia lead in the physical health pillar; overall, richer countries attain higher scores in this area. Eight countries have clear government recommendations on the healthy use of digital technologies. Only Canada, India, Estonia, and Ghana fully address physical health risks in school curricula. Viet Nam, Malaysia, Ghana, and Nigeria reported more physical health complaints associated with digital technologies including dry eyes, headaches, and back pain. Algeria, Ghana, and Bangladesh reported greater disruption to offline activities such as in-person engagement with family and friends, and missing work and school related activities.

"Right to disconnect"[01] policies show decisive action to promote digital wellbeing and represent one area with the potential to be developed around the world.

Affluent countries are generally stronger in this area, with Australia, Italy, and Germany leading in the ability to disconnect pillar. Argentina, Mexico, and Colombia, middle-income countries, demonstrate a strong performance too. Nine countries in the DWI — Australia, Argentina, Canada, Chile, Colombia, France, Germany, Italy, and Mexico — have established legislation on the right to disconnect. When it comes to remote work or study, challenges in maintaining healthy boundaries show no significant differences across income segments, but advanced economies show overall higher adoption rates of measures to promote digital wellbeing at work.

Misinformation and disinformation pose risks to wellbeing that require government action around the world.

Estonia leads in the information quality pillar, followed by Argentina, and Canada. Fourteen countries demonstrate clear governmental action against misinformation. Seventeen countries, across all income levels integrate disinformation awareness into education. Trust in online information is highest in Nigeria, followed by Bangladesh, Germany, and Estonia with generally similar levels across income segments. Viet Nam, Indonesia, and Malaysia are the most active in verifying information accuracy.

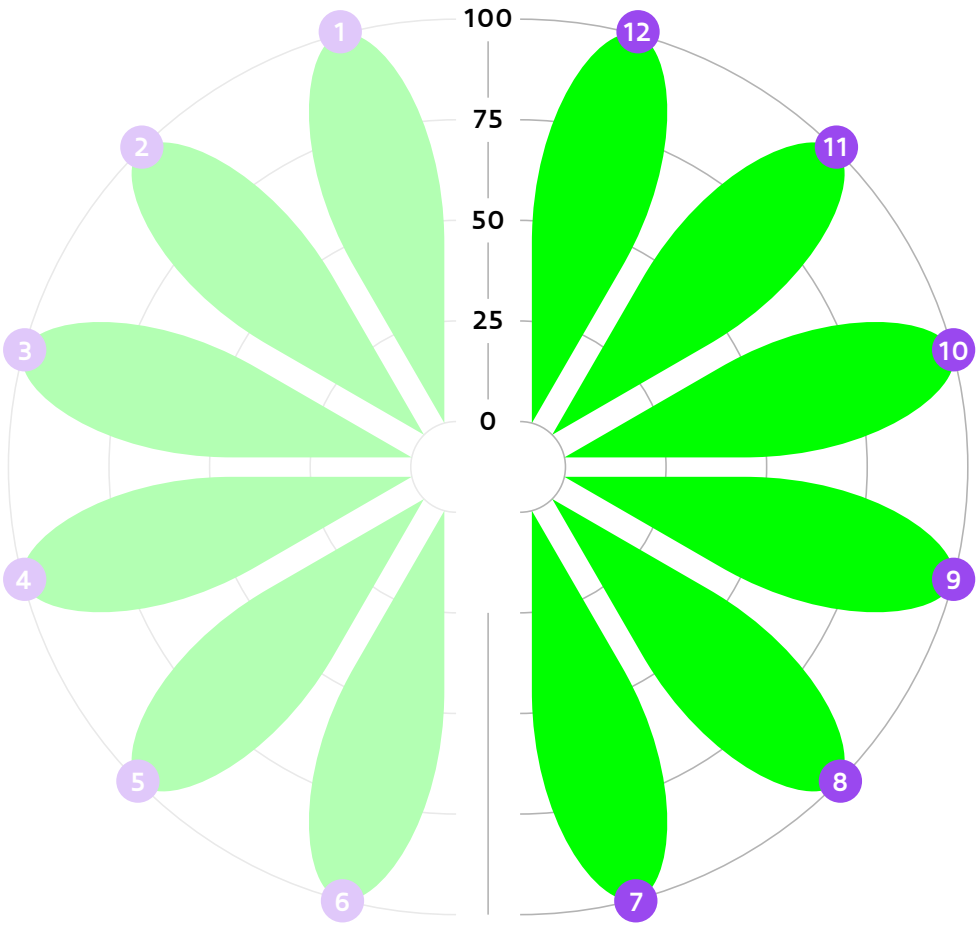
Challenges in data safety are more evident in middle-income countries, while cyberbullying needs more policy action around the world.

The top performers in the cybersafety pillar are the United States, France, and Singapore. The United States, Saudi Arabia, and the United Kingdom lead in cybersecurity commitment. More secure internet servers are found in wealthier nations. Australia, China, and Canada lead in user strategies to protect personal data. The United States leads in cyberbullying and cybersafety policies, followed by Canada and France. Across most countries, policies focused on parents are well established. These include resources and digital safety toolkits for parents to deal with cyberbullying. However, policies focused on children and youth, such as e-safety guidelines and provisions for cyber wellness in education curriculum, are less common.

01 Refers to the "Right to disconnect" is defined as the right not to engage in work-related electronic communications during non-work hours.

Capturing Opportunities

The "Capturing Opportunities" sub-index/component examines six pillars comprising enablers of digital adoption and opportunity across a range of contexts. This component captures the pre-requisites for adopting digital technologies and the extent to which opportunities are maximized.



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For the Capturing Opportunities component, data collected for the DWI reveals:

Digital interaction does not always lead to meeting people offline, and some of the least affluent countries are the most dynamic in online activism.

The strongest social connectedness is evidenced in the United Arab Emirates, Chile, Bulgaria, Colombia, and Malaysia. Social media engagement averages 68% across all countries, with advanced economies leading. Meeting new people using digital devices is less common in high-income nations (35%) compared with upper-middle-income (55%) and lower-middle-income countries (59%). China and India lead in online engagement, while Nigeria and Kenya are leaders in online activism. Generally, emerging economies score higher in active online engagement and activism.

Middle-income countries embrace online education and training, but still have a journey ahead in integrating digital skills (e.g. using digital safety tools, ability to verify misinformation) in curricula.

Estonia leads the education and skills pillar, followed by Indonesia, the Republic of Korea, Singapore, and Kenya. While this reflects a mix of income levels, richer countries generally score higher. Internet access in schools is led by advanced economies, and less affluent nations face challenges in integrating digital skills. Most countries recognize micro-credentials, indicating a widespread trend among both employees and employers to be more open to new types of qualifications. Middle-income countries show strong engagement with digital tools in education, and digital device use for accessing information is also high across this group.

Advanced economies lead in work flexibility, while digital technologies and regulation allow middle-income countries to participate more fully in the knowledge economy.

Estonia, Singapore, Australia, and the United Arab Emirates lead in the work, productivity, and income pillar, with upper-middle-income countries outperforming high-income ones on average. Less affluent countries — including India, Viet Nam, and Bangladesh — have ample room for growth. Remote work frameworks are more advanced in richer nations, while digital nomad visas[02] are prominent in middle-income countries such as Argentina, Colombia, and Brazil. Estonia and Singapore have some of the strongest tech sectors. Ghana and Kenya, meanwhile, have growing tech sectors, demonstrating how the digital economy can empower emerging economies.

Digital technologies are democratizing access to art and entertainment.

Argentina leads in the entertainment and culture pillar, followed by Estonia, the Republic of Korea, India, and Sweden. The DWI notes widespread government support for digital tourism and culture, particularly in wealthier countries. Estonia stands out in experiencing art digitally, while China leads in using technology for creating and sharing art. Middle-income countries generally report greater use of digital devices for consuming artistic and cultural content online compared to their high-income counterparts.

02 "A digital nomad visa is a type of visa that allows you to work remotely for a country registered outside of the country you have chosen to currently live in. Typically, to work in another country, you must have a work permit, and be registered as a taxpayer. This requires you to uproot your entire life back home. Digital nomad visas, on the other hand, have the benefit of becoming a temporary resident of another country, while you work (and pay taxes) in your home country. In the majority of cases, digital nomads are not required to pay taxes in their host country." Source Schengen Visa Info https://www.schengenvisainfo.com/digital-nomad-visa/

There is widespread availability of key digital services for the population, but participatory policymaking remains nascent in some countries.

Seventeen out of the 35 countries have a telecom or ICT regulator for managing digital applications such as e-health and e-education. Meanwhile, Estonia leads in access to services and goods, followed by China and Singapore, with advanced economies dominating the top half of the list. China excels in overall digital health engagement, with lower-middle-income countries surpassing their higher-income counterparts. Digital payments have a 71% engagement rate globally. China leads in online shopping (80%), while Sweden and the United Kingdom do well in managing finances online, additionally, Estonia, Sweden, China, and Colombia show strong engagement with transportation technologies (e.g. car sharing or public transport apps).

Universal internet access is a goal around the world, but some disparities highlight the need for further government support.

The United Kingdom, followed by Canada and France, leads in social cohesion, which focuses on universal access policies, digital literacy for all, and digital inclusion). Almost all countries have universal access and service policies, while 16 countries, mostly high-income, feature comprehensive regulatory frameworks for information and communications technology accessibility. Digital literacy initiatives outside formal education show progress across countries, with notable examples in middle-income countries. The International Telecommunication Union gender parity score indicates that more women than men use the internet in some affluent countries, while Germany, the United Kingdom, and Estonia lead in socio-economic inclusion.

Some countries still require infrastructure investment to reach universal connectivity.

The United Arab Emirates, Saudi Arabia, and Kuwait excel in connectivity, with Malaysia and Bulgaria challenging the notion that only the wealthiest economies provide comprehensive connectivity. Despite widespread 4G coverage, some emerging economies face challenges in network infrastructure. Internet penetration rates vary significantly, with high-income countries at 93%, upper-middle-income countries at 79%, and lower-middle-income countries at 53%. Affordability issues reflect economic disparities, with people in richer nations spending less than 0.1% of their income on connectivity, compared with 2.3% and 5.4% in upper-middle and lower-middle-income countries.

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Sync is a digital wellbeing initiative by King Abdulaziz Center for World Culture (Ithra) with a vision to create a world where we are all in control of our digital lives.

The program is guided by extensive research - in collaboration with global entities - to understand the implications of technology and how it's affecting our lives, and translate the knowledge we gain into awareness campaigns, tools, experiences, educational content and programs aiming to raise global awareness around the topic.

sync.ithra.com