



BPO, SHARED SERVICES IT – TRENDS & OUTLOOK

Accelerating success.

01. MARKET DATA



NEW DEMAND 2014 – 95,000 m² OUT OF WHICH:

BPO: 27% (25,300 m²)

PROPERTY	TENANT	SIZE (m ²)
AFI Business Park 3	Endava	2,000
West Gate Park H4	Ericsson	4,000
Floreasca Park	Allianz Managed Services And Operations	3,500
West Gate Park H4	WNS	2,500
Floreasca BP - A	Lenovo	2,000
West Gate Park H4	Accenture	1,100
Cubic Center	Luatel	860
Phoenix Tower	Zitec	830
Green Gate	Fujitsu	210
City Gate North	Microsoft	2,000
AFI Business Park 3	Telus	4500
Bucharest Tower Center	Huawei	602
BOC Project	HP	1237
		25,339

TOTAL IT: 47% (45,000 m²)

PROPERTY	TENANT	SIZE (m ²)
Opera center I	King	1,700
Bucharest One	Vodafone	12,000
AFI Business Park 3	Endava	2,000
Hermes Business Campus	Xerox	1,124
Sky Tower	Symantec	250
Premium Plaza	Mavenhut	505
Opera center I	Qualitance	528
Premium Plaza	Ecrion Software	516
River Plaza	War Payment	200
AFI Business Park 3	Inaxio Consulting	3,000
Swan Office Park A	Cloud Business Solutions	400
Swan Office Park A	Emag	1,000
West Gate Park H4	Ericsson	4,000
West Gate Park H4	WNS	2,500
Floreasca BP - A	Lenovo	2,000
Cubic Center	Luatel	860
Phoenix Tower	Zitec	830
Sky Tower	Apcom	300
Green Gate	Fujitsu	210
City Gate North	Microsoft	2,000
AFI Business Park 3	Telus	4500
Rosetti Office Building	Tellence	392
Rosetti Office Building	Homerun Ciero	392
West Gate Park H5	Accenture	1400
Bucharest Tower Center	Huawei	602
BOC Project	HP	1237
		44,446

02. WHY ROMANIA



1. GRADUATES/YEAR: 311K - THE HIGHEST IN EASTERN EUROPE
2. LANGUAGES: 24
3. POPULATION: 21 M
4. FULL RANGE OF OUTSOURCING SERVICES OFFERED
5. COMPARABLE WITH MALAYESIA IN TERMS OF COSTS – MALAYESIA BEING THE MOST ATTRACTIVE DESTINATION NOW
6. EUROPEAN CULTURE
7. LOWEST TARRIFS FOR DATA IN EU
8. INTERNATIONAL ACCESIBILITY

- One of the largest markets in Central and Eastern Europe (ranking 7th in EU , with over 21 million inhabitants);
- Highly skilled labor force at competitive prices – solid knowledge in foreign languages (providing multilingual support services/24 languages), technology, IT, engineering, etc
- Highly educated people, flexibility, regional presence and proximity to customers;
- Cultural similarities with Western cultures.
- Stability factor in the Area – NATO & EU membership;

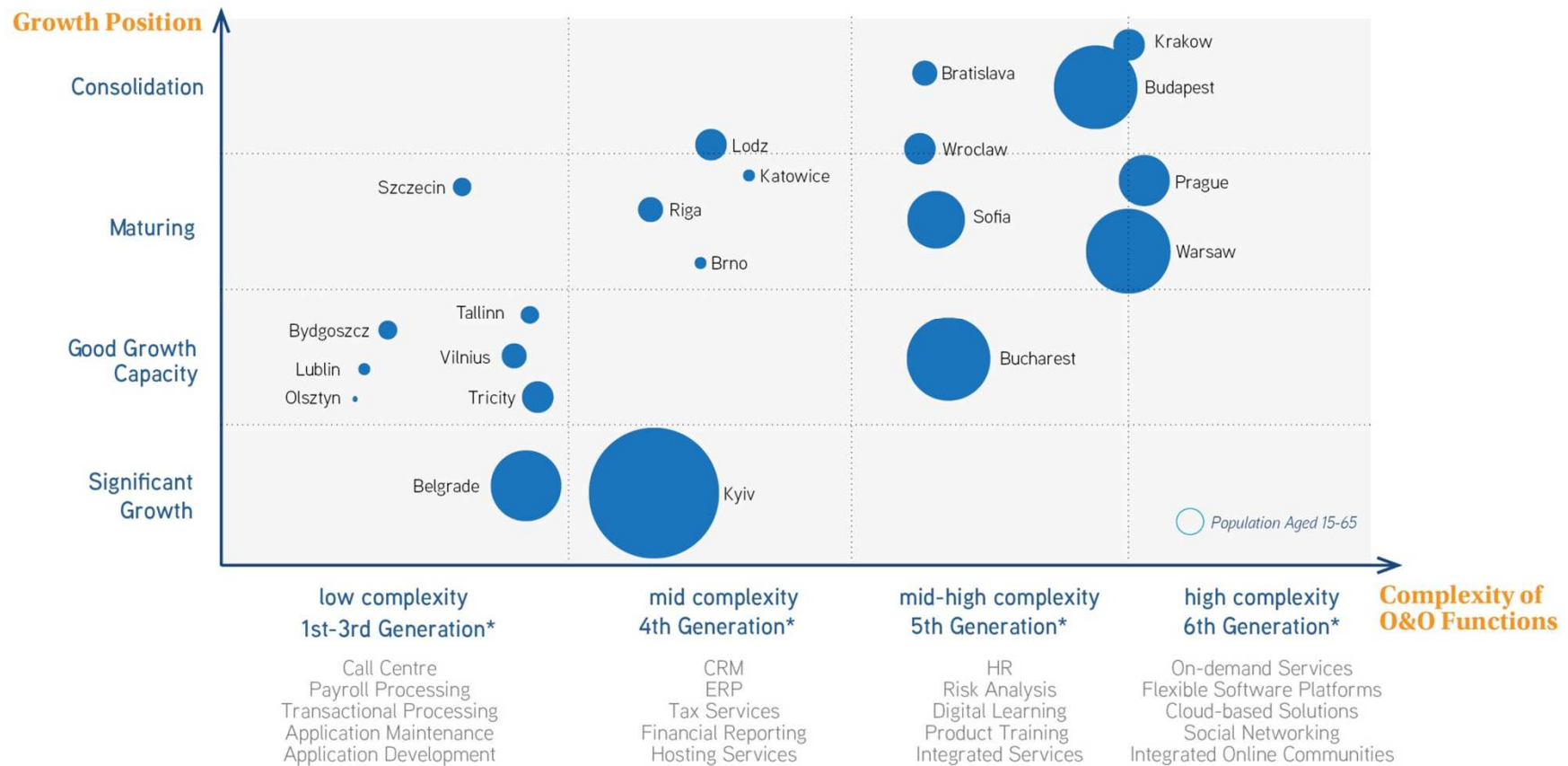
RISKS:

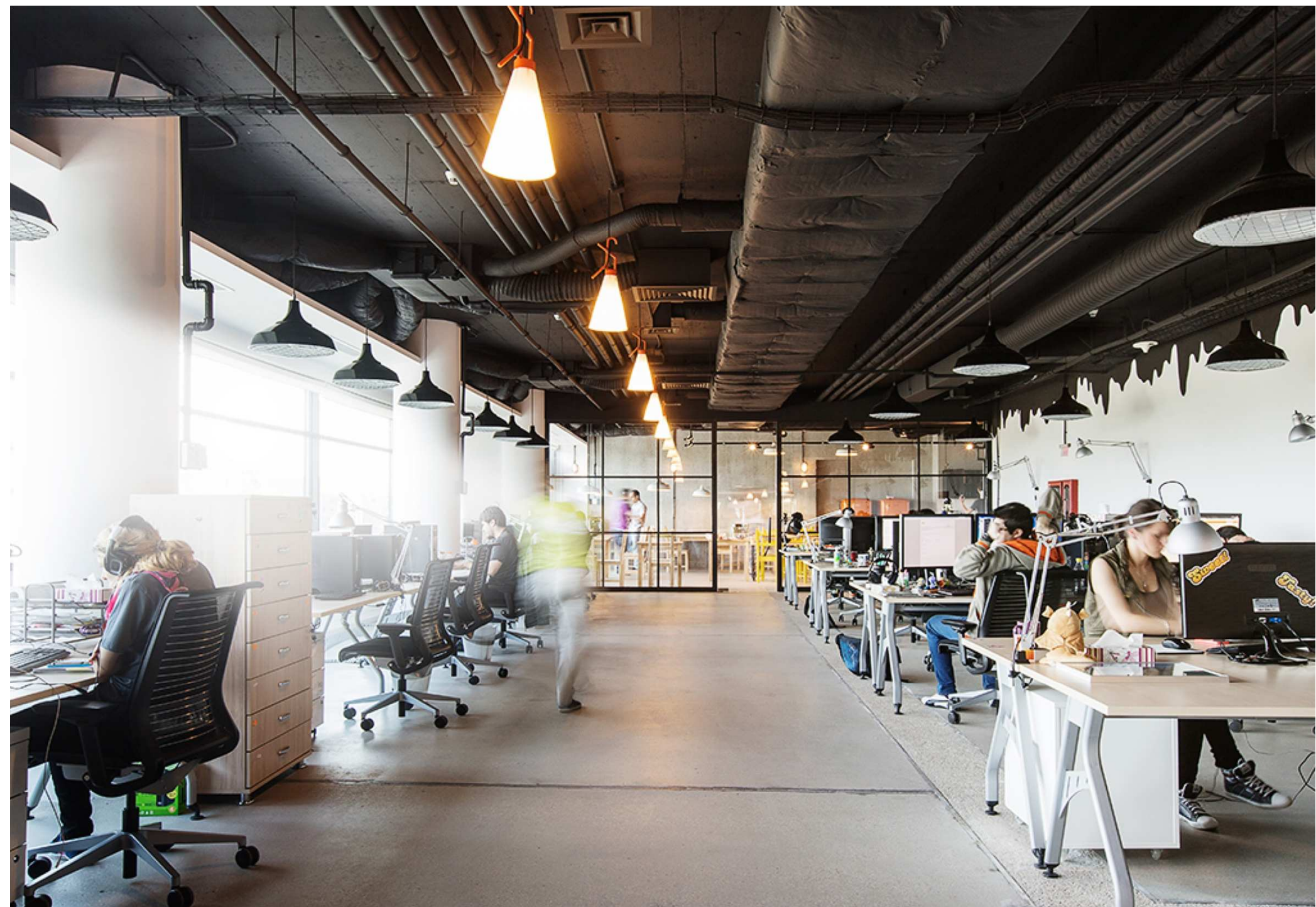
PIRACY LAWS; LACK OF INFRASTRUCTURE;
EUROPEAN ECONOMIC CRISIS; CURRENCY
APPRECIATION ON NON EU COUNTRIES.



Source: EVZ

03. THE FUTURE

















THANK YOU!

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