

IT, BPO & SSC IN MOLDOVA

Opportunities for regional development

\$300 M in exports in 2019



Sector Overview

\$396 M

sales revenue

2,300

companies



29,600

employees

15,000

IT specialists

BPO&SSC activities in Moldova



Serviced sectors

 Travel

 Telecom

 Banking

 Insurance

 IT

 Logistics

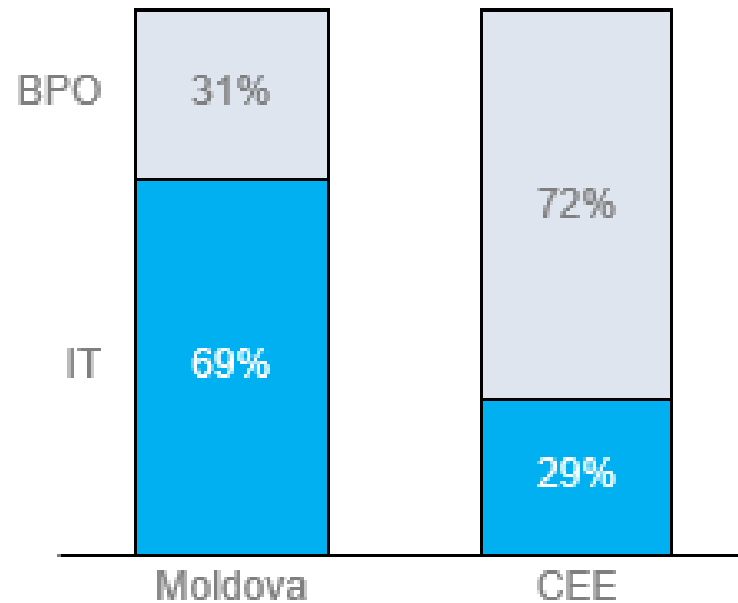
 Retail



BPO has a bigger potential than the IT sector

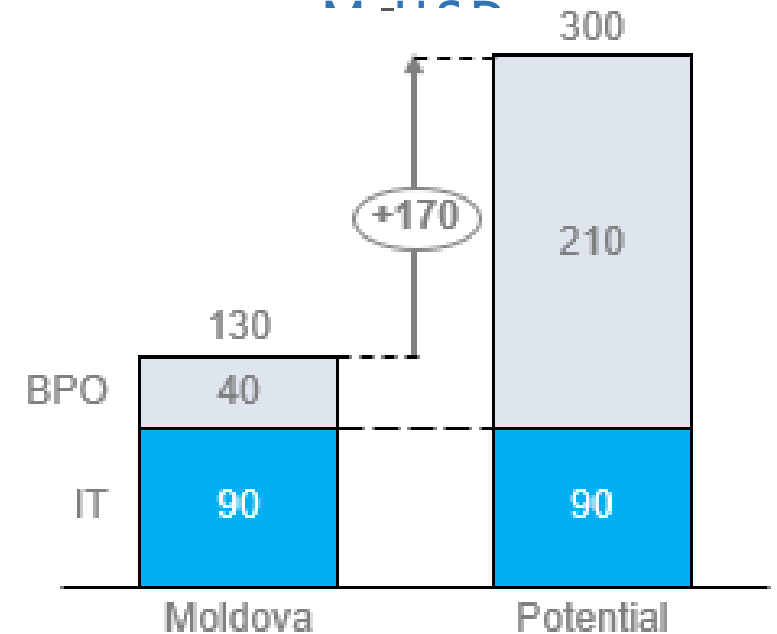
As demonstrated by the experience of countries such as Poland, Bulgaria and Hungary

Structure of outsourcing services, %



+35,000 jobs

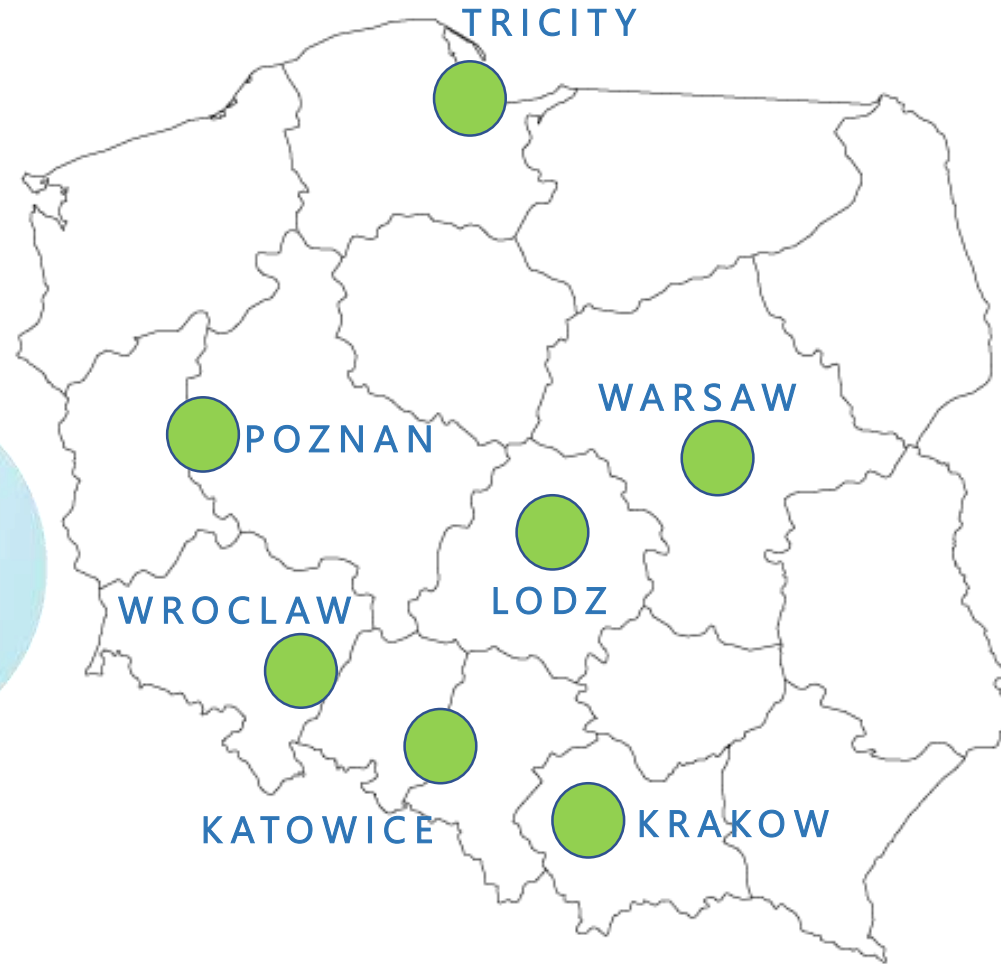
Growth potential of the non-IT outsourcing sector, M USD



+\$170 M

Regional development in other

countries
POLAND



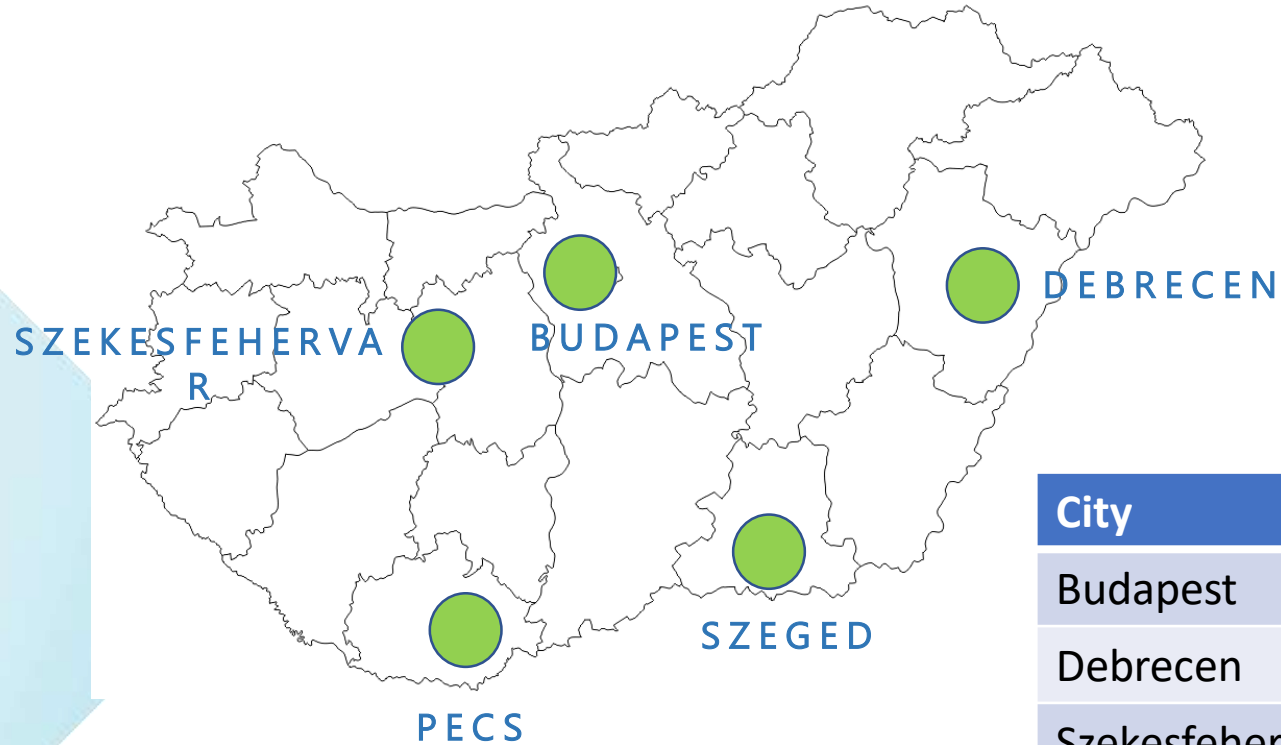
City	Population	Employees
Krakow	766,683	55,800
Warsaw	1,765,000	42,600
Wroclaw	638,659	40,000
Tri-City	748,986	19,300
Katowice	302,397	19,000
Lodz	696,708	18,100
Poznan	540,365	13,500

Source: ABSL



countries

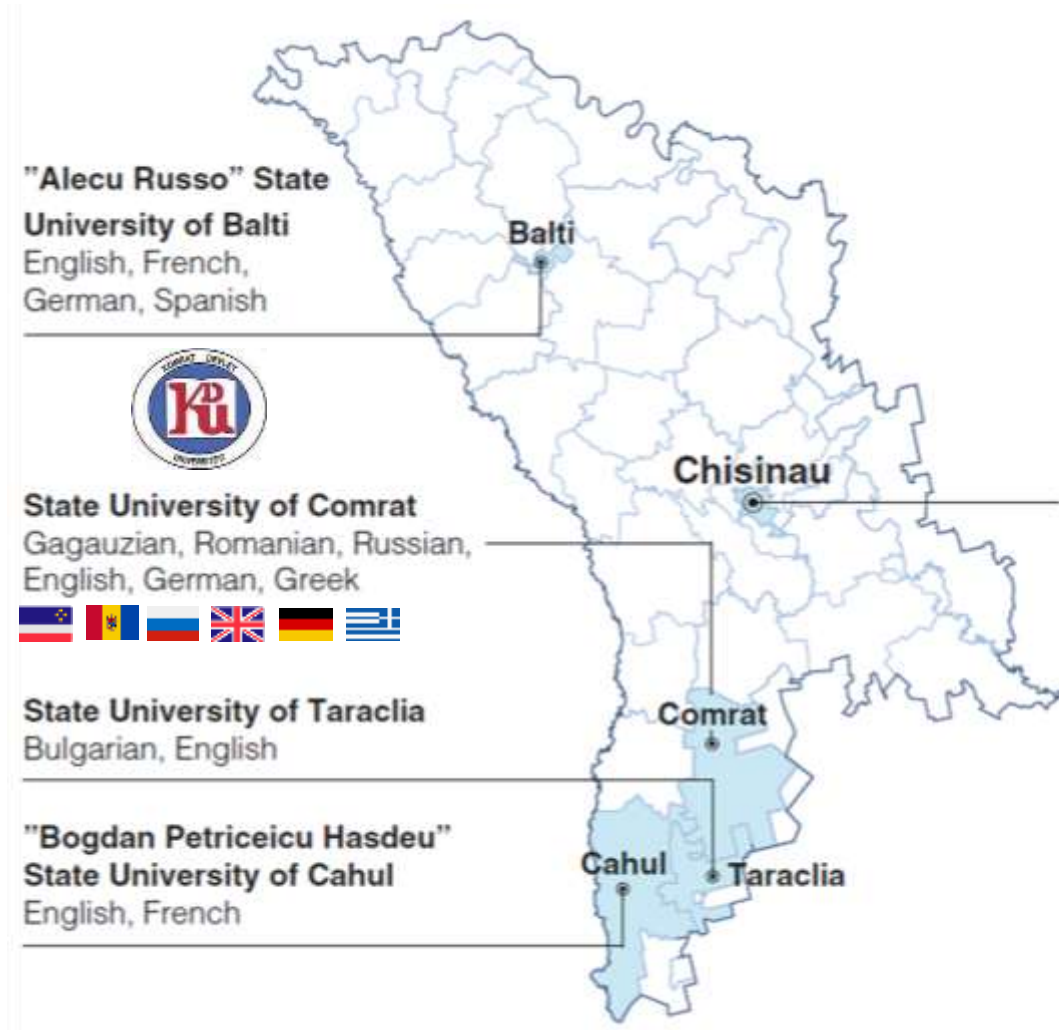
HUNGARY



City	Population	Employees
Budapest	1,756,000	32,769
Debrecen	202,520	3,616
Szekesfehervar	100,570	2,830
Szeged	161,879	864
Pecs	145,011	274

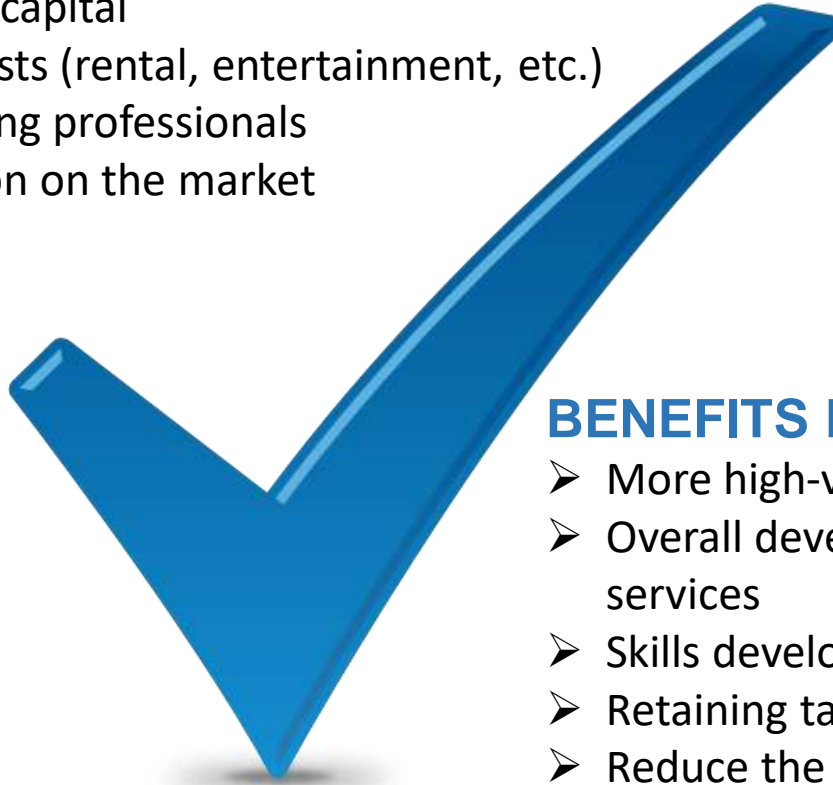
Source: HIPA

Regional opportunities in Moldova



BENEFITS FOR COMPANIES:

- Cost efficient human capital
- Lower operational costs (rental, entertainment, etc.)
- Qualified pool of young professionals
- Less or no competition on the market



BENEFITS FOR THE REGION:

- More high-value added jobs
- Overall development of infrastructure and other services
- Skills development
- Retaining talents in region
- Reduce the gaps between the capital and regions





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