

“Plovdiv – Attractive to the IT and BPO companies”

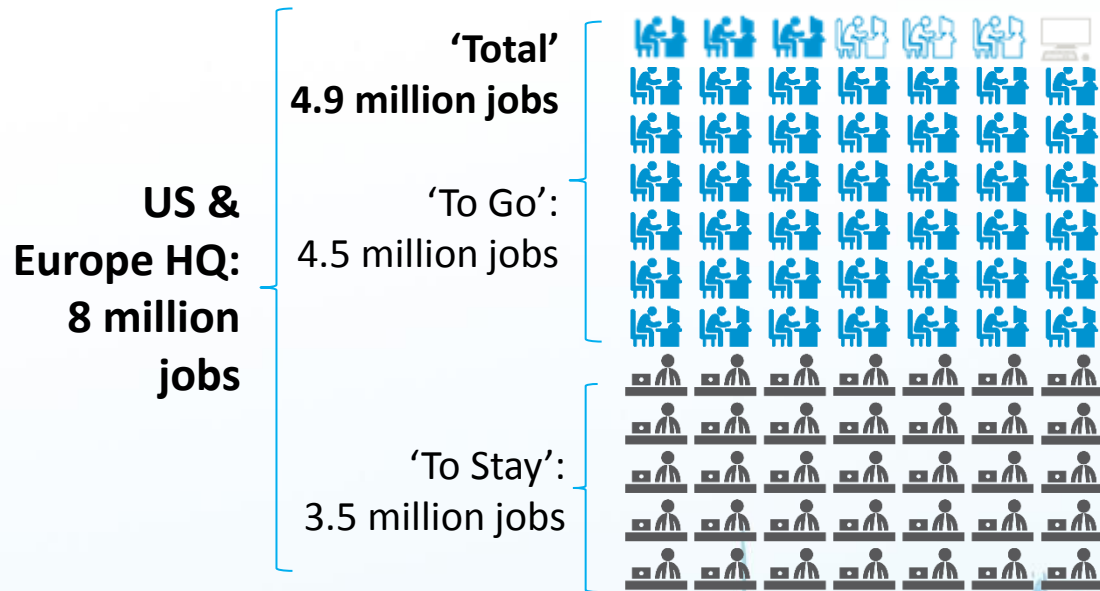
Iglika Yordanova
Managing Director
Colliers in Bulgaria

September 10, 2015

Labour market

Is this it for IT and BPO sector?

2002



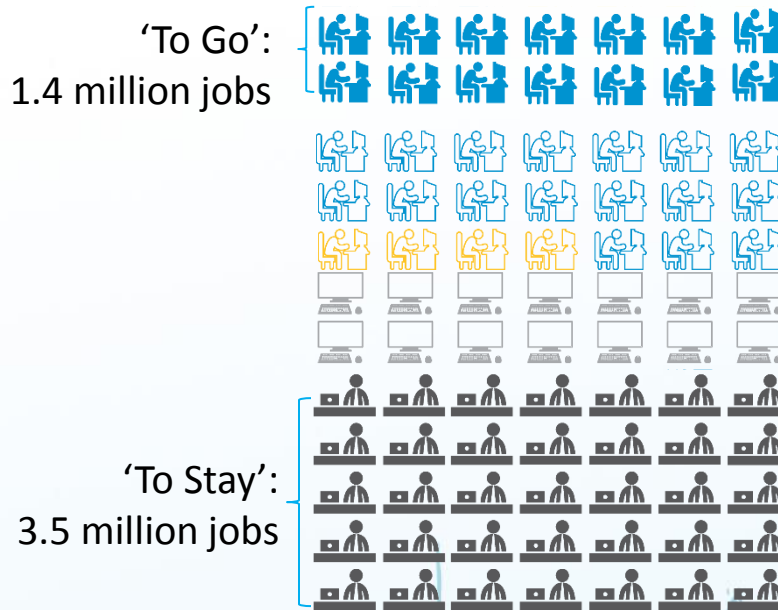
- 300,000 jobs outsourced
- 100,000 jobs 'obsolete'

| | |
|----------------------|--|
| Non- outsourcable | |
| Outsourceable | |
| Outsourced | |
| Productivity Improv. | |
| 0.1 mln jobs | |

Labour market

Is this it for IT and BPO sector?

2014



Outsourced = 2 million jobs



CEE = 400,000 jobs (20%)

Obsolete = 1.5 million jobs

- Non- outsourcable
- Outsourceable
- Outsourced
- Productivity Improv.
- 0.1 mln jobs

Additional IT and BPO Jobs by 2025?

'To Go':
1.4 million jobs



20% of this for CEE =
280,000 new jobs



2nd Best Choice City in CEE

Supply & Vacancy (sq m)

Plovdiv / Bulgaria



Košice / Slovakia



Timisoara / Romania



Debrecen / Hungary



Brno / CZ Republic



Krakow / Poland

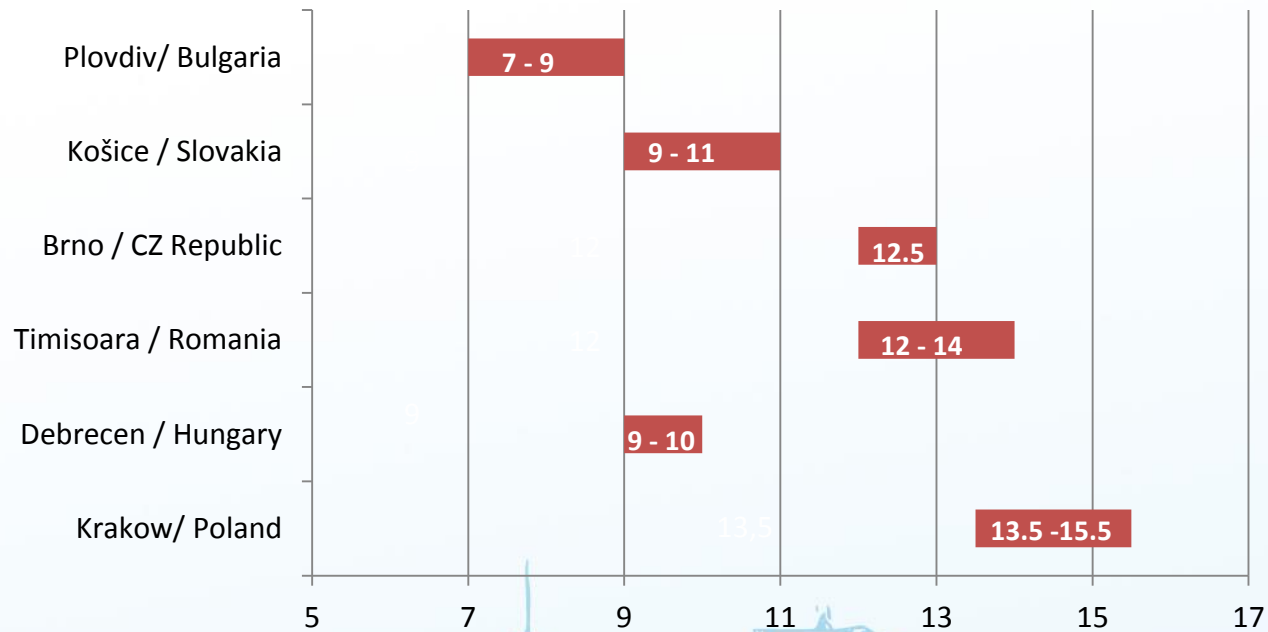


Supply

Vacancy

2nd Best Choice City in CEE

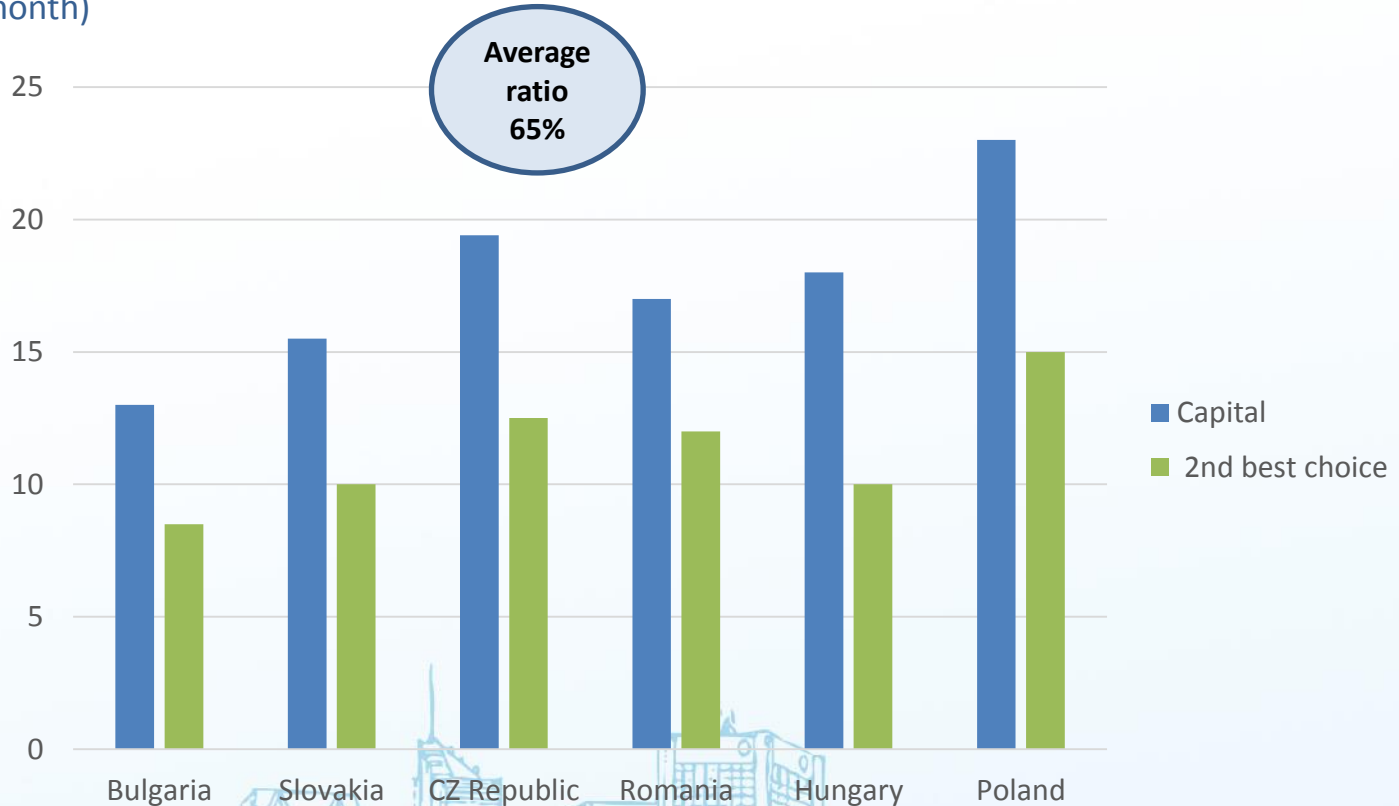
Headline Rent (EUR/ sq m/ month)



2nd Best Choice City in CEE

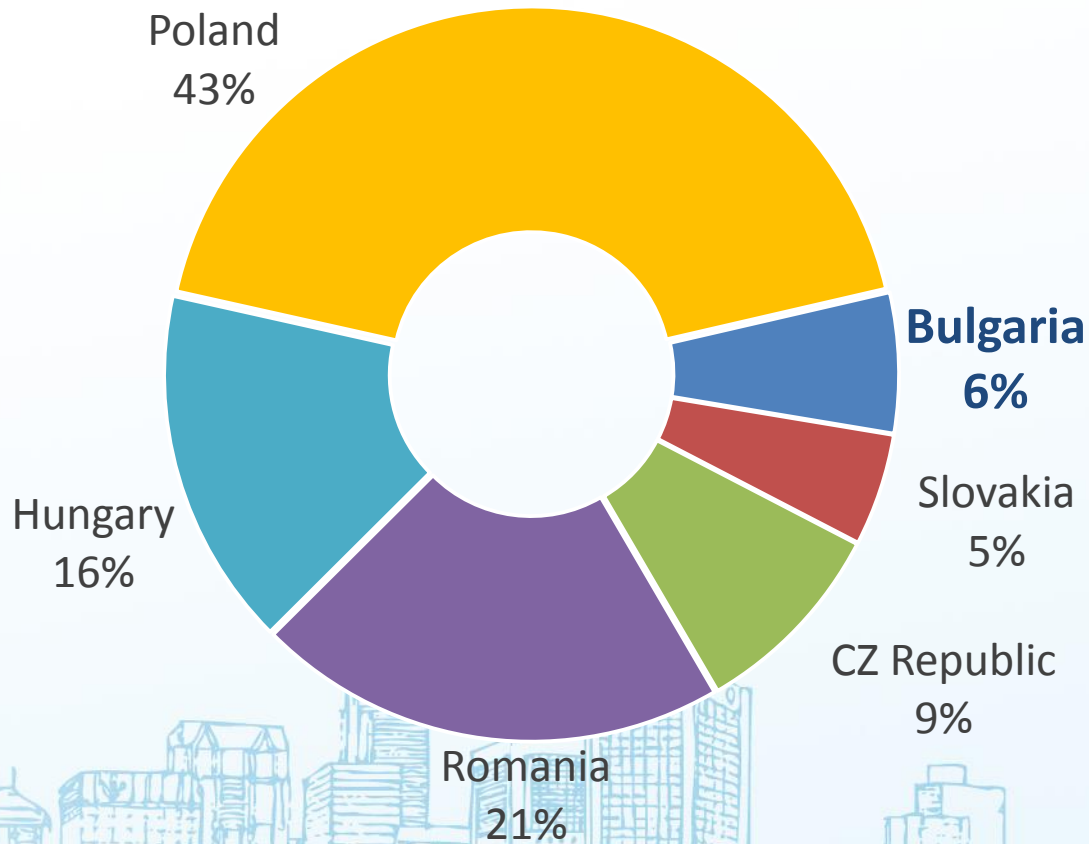
Headline Rent – comparison

(EUR/ sq m/ month)



Jobs in IT and BPO Sector in 2003-2014 in CEE

What is the Bulgarian share?

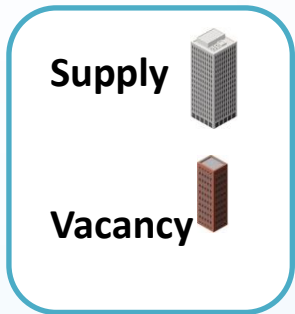


Is Plovdiv ready to be the next Hotspot city?

Is adequate real estate platform in place?

- International access/ access to capital
- Headline rent
- Vacancy rate
- Office space under construction/ Scalable floor space
- No of projects offering min 1,000 m2 office space available

Plovdiv



2015



= 14,000 m² class B predominantly

➔ 1,500 employees

Colliers
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Accelerating success.