



# Nearshoring

Posição atual, fatores de  
atratividade e perspectivas  
para o futuro

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# Portugal

One of the best  
nearshore  
locations  
worldwide

In the last  
decade





# Key figures of nearshoring in Portugal

Number of  
Companies **>100**

Business Service  
Centers **>200**

Employment **49.000 - 60.000 +**

**64%** service group  
operations  
(captive)

**30%** Created  
in the last 4  
years

**80%** support  
European  
markets

**9%** of the  
employees are  
foreigner



# Why we are competitive



## 1 Language is key

- Portuguese diaspora (2M+) in Europe
- 7<sup>th</sup> country in the world with best non-English native proficiency



## 2 Cost

- 15% lower vs. Spain
- 30-40% lower vs. North Europe (France, Germany, UK)
- Labor cost increase trend is the same on other European markets



## 3 Skills & Infrastructure

- ~50K graduates per year (20% on STEM related fields)
- Growing tech enabled country (10% of GDP & startup creation 13pp above European average)
- Competitive, state of the art telco infrastructure (2<sup>nd</sup> largest data processing capacity in Europe in the future)



## 4 Cultural affinity (very important)

- Portuguese diaspora in key European markets
- Country open to the world (tourism, diplomacy)
- Media without language filter

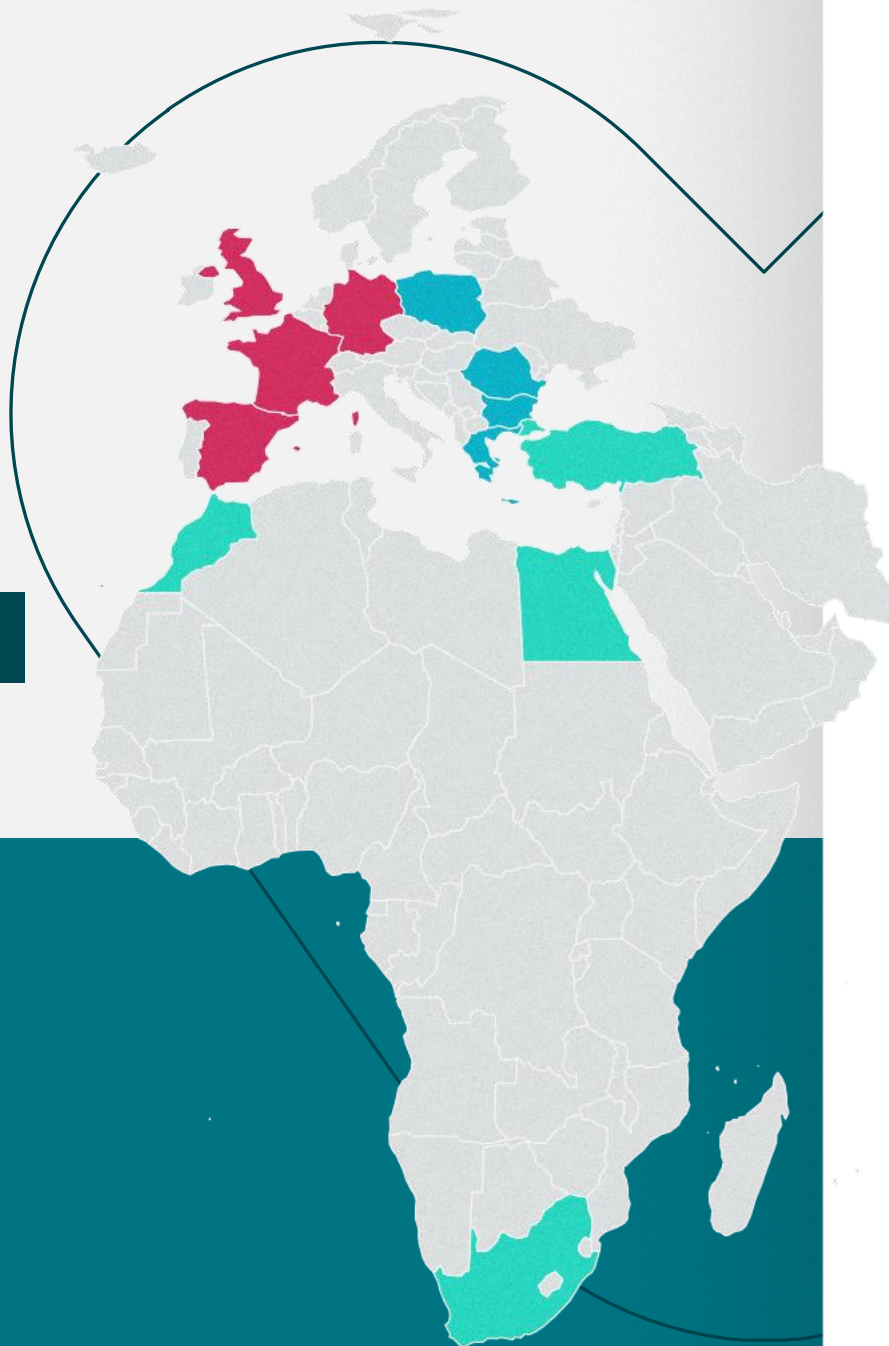
# EMEA nearshoring trends

CXM

adoption

by delivery

location



Major locations in

**Western Europe**

France, Germany,  
Spain and UK

Major locations in

**Eastern Europe**

Bulgaria, Greece,  
Poland and  
Romania

Major locations in

**Middle East & Africa**

Egypt, Morocco,  
South Africa and  
Turkey

- Western European locations are sources of business for Portugal and not direct competition
- In Eastern Europe, Greece is a direct competitor in the CXM/BPO and Poland a direct competitor in SSC/GBS
- MEA countries aren't direct competitors but are a solution when Portugal cannot supply the volumes needed

# EMEA nearshoring trends

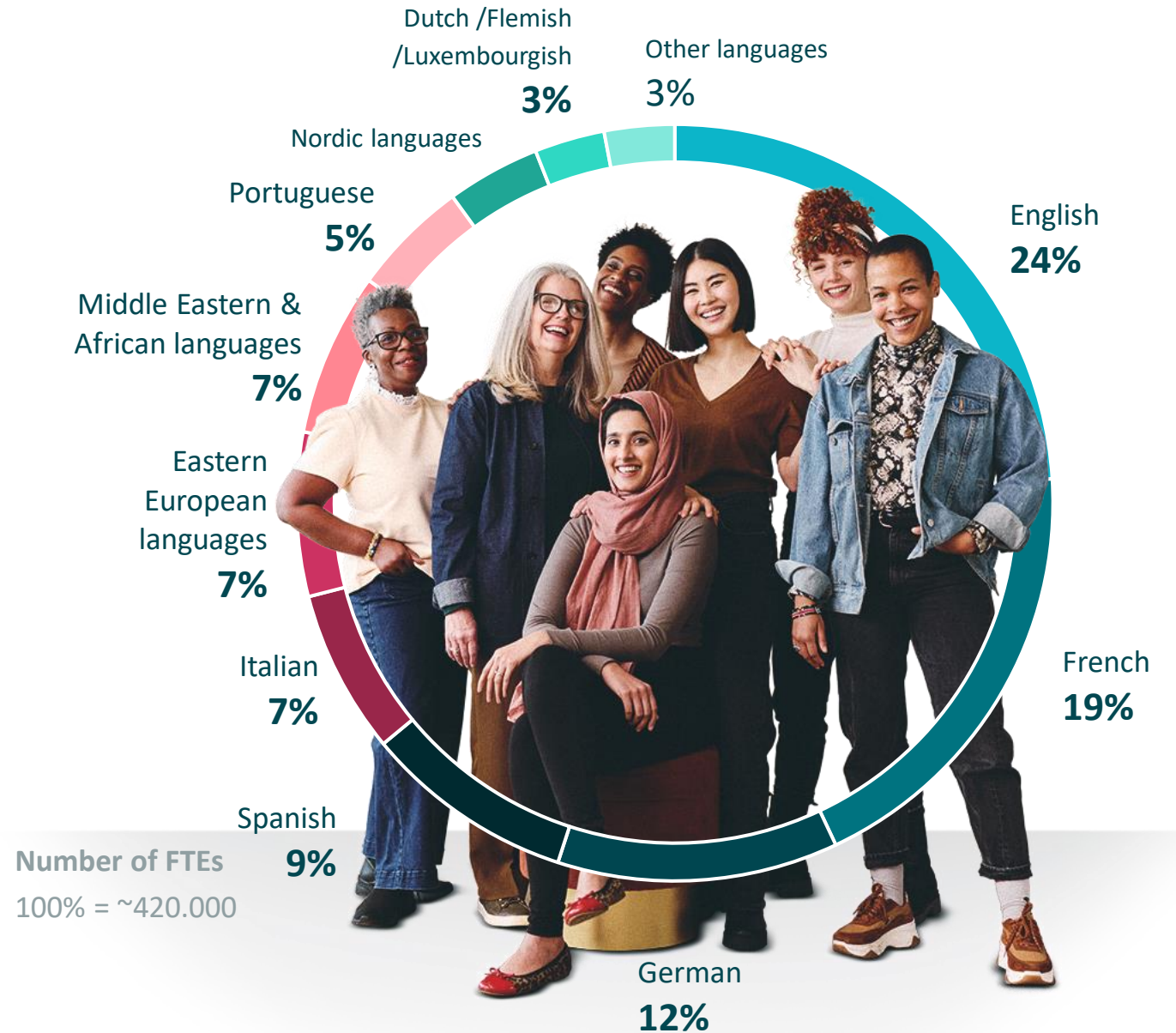
CXM

adoption

by language

- Portugal is a prime destination for 57% of the market (languages PT, ENG, FR, ES)
- 43% of the Delivery Centers are in Germany, France, UK and Spain
- 40% of the Delivery Centers are in offshore and nearshore locations

Source: Everest, others

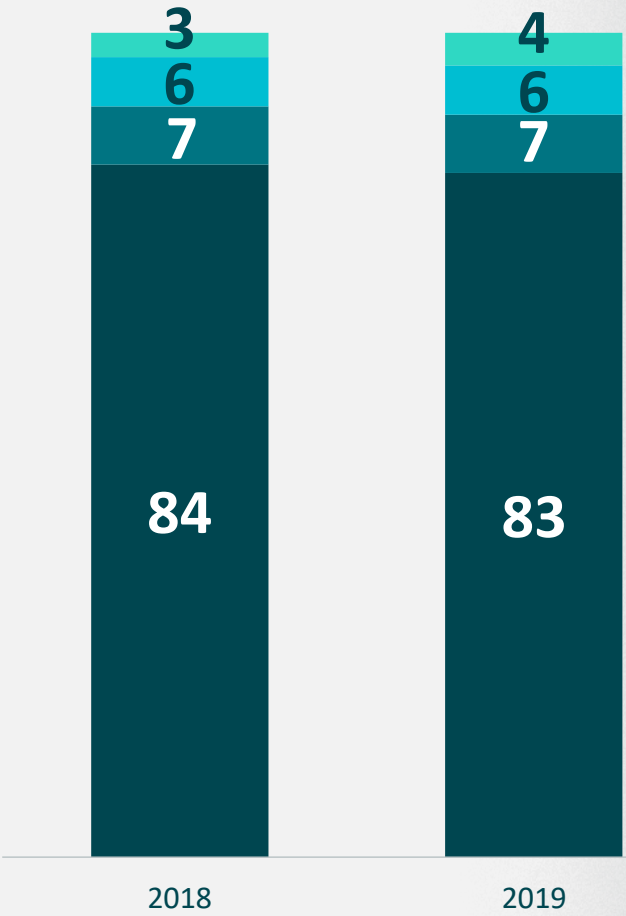




# EMEA nearshoring trends

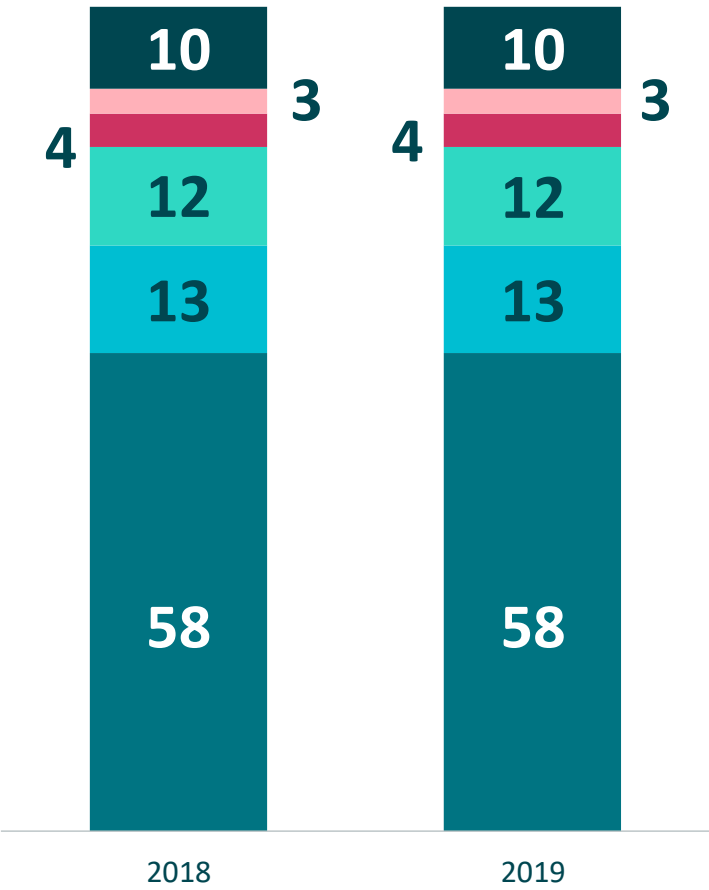
CXM  
market size  
by channel

- Social Media
- Chat
- Email
- Voice



CXM  
market size  
by process

- Other Services
- Payment Collection
- Order Fulfillment & Transaction Processing
- Sales Service
- Technical Support
- Customer Service



A large, powerful wave is crashing over a stone wall. A group of people is standing on the wall, watching the wave. The scene is set in a coastal area with a stone wall and a lighthouse in the foreground. The entire image has a teal color overlay.

Portugal

Riding the wave