

# Business Service Centres in Portugal

June 2025

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Commissioned by



**AICEP**

Portugal Trade & Invest





### **Welcome to the Third Edition of the Business Service Centres in Portugal Report!**

This edition provides a comprehensive overview of the latest developments shaping Portugal's business services sector. This export-oriented industry is experiencing significant growth, mostly driven by innovation, digital transformation, and its most valuable asset: a highly skilled workforce. The survey reveals that these human resources are recognised for their technical expertise, problem-solving skills, and adaptability, all of which are crucial for long-term success. As a result, attracting and developing this talent is essential for achieving sustainable growth.

In addition to a strong workforce, technological advancements such as robotic process automation, artificial intelligence, and data analytics are significantly enhancing operational efficiency and service delivery. The widespread implementation of these technologies is driving productivity and improving overall performance within the sector. In addition, this report marks the first time we explore environmental, social, and governance (ESG) practices in this industry, revealing that many companies have already integrated sustainable and ethical business strategies into their operations.

As the sector evolves, Lisbon and Porto continue to be the primary business service hubs in Portugal, due to their infrastructure, international connectivity, and extensive and diverse talent pool. Moreover, this report reveals that mid-sized cities are rapidly emerging as dynamic growth centres, providing access to untapped talent and further reinforcing Portugal's global competitiveness.

These factors collectively position Portugal for sustained growth and success on the European business services scene. We invite you to explore the insights of this report, which provide valuable perspectives on the current sector's environment, key developments, and future opportunities shaping the industry.

**Madalena Oliveira e Silva**

*Chairwoman and CEO*

### Welcome to the third edition of the Business Services Centres in Portugal Report!



The Business Services Centre sector in Portugal continues to demonstrate remarkable growth, resilience, and transformation, reinforcing the country's position as a leading near-shore destination for global organisations. This 2024 edition provides a data-driven, in-depth perspective on the industry's evolution, investment trends, operational models, and the role of talent and technology in shaping its future.

Over the past decade, Portugal has emerged as a key hub for shared services, outsourcing, IT service centres, and R&D facilities, attracting multinational companies across diverse industries. This success is fuelled by a highly skilled and multilingual workforce, a stable and business-friendly environment, and competitive operational costs.

This year's report, conducted by IDC in collaboration with AICEP, is based on:

- ✓ A comprehensive survey of senior executives from business service centres in Portugal, representing over 40% of the industry
- ✓ Eight in-depth interviews with leaders shaping the sector's future
- ✓ A deep dive into industry trends, covering growth dynamics, talent strategies, digital transformation, and operational best practices

#### Key themes explored in this edition include:

- **Talent as a Strategic Asset:** Portugal's multilingual, highly educated workforce—especially in STEM fields—remains a primary driver for multinational investment.
- **Technological Advancement and Value Creation:** The sector is rapidly evolving through the adoption of AI, RPA, and data analytics, enabling a shift from transactional services to high-value functions such as R&D and cybersecurity.
- **Geographic Diversification and Regional Growth:** While Lisbon and Porto remain central, secondary cities like Braga, Aveiro, and Coimbra are emerging as innovation hubs, contributing to economic diversification across the country.
- **ESG Integration as a Core Strategy:** Environmental, social, and governance (ESG) considerations are increasingly embedded in operational strategies, with companies aligning sustainability efforts with global standards to enhance competitiveness and resilience.
- **Future-Proofing the Workforce:** Pressures from global economic volatility, inflation, and talent competition, prompt a strong focus on upskilling—particularly in AI and cross-functional capabilities—to future-proof operations.

#### Looking Ahead

Portugal is well-positioned to sustain its role as a near-shore hub for business services. Investments in education, digital infrastructure, and regional development continue to bolster its competitiveness. Public-private collaboration—especially in advancing AI literacy and green innovation—further enhances the sector's resilience. As global enterprises seek agile, cost-effective, and ethically aligned partners, Portugal's unique blend of talent, digital maturity, and geographic location positions it as a pivotal gateway to European and transatlantic markets.

As companies adapt to new economic and technological realities, this report provides essential insights for business leaders, policymakers, and investors looking to optimise their operations in Portugal.

At IDC, we remain committed to delivering data-driven insights and strategic recommendations that empower organisations to navigate and thrive in an increasingly competitive global landscape.

We invite you to explore the insights in this report and join the conversation shaping the future of business services in Portugal.

**Jen Thomson**

*AVP, Cloud Innovation and Services, Europe, IDC*

# INTRODUCTION



# Concepts And Methodology

## INTRODUCTION

AICEP has commissioned IDC for the third edition of this paper to provide an updated view of the business services industry in Portugal. Over the years, the sector has become an important contributor to the economy, supporting job creation and international service exports. Its growth is shaped by evolving business models like hybrid and remote working, investment trends, and Portugal's position in the global market for Business Services Centres.

In the scope of this analysis, we have considered service centres and organisations that are aligned with one or more of the following concepts:

- **Shared Service Centre/Global Business Service Centre:** Organisational unit or company within a large business group, created with the purpose of cost optimisation and efficiency, executing specific administrative processes to serve several group companies.
- **Business Process Outsourcing Centre:** A profit centre within professional services companies, specialised in specific processes, such as customer support, telemarketing, or any other administrative or effort-consuming business process. Its purpose is to provide outsourcing services for organisations interested in cutting costs, moving from CAPEX to OPEX, achieving greater flexibility, and disposing of non-core business activities.
- **IT Service Centre:** Same concept as a Shared Service Centre, but specialising in information technology tasks like service desk, software maintenance and development, and infrastructure operations. In this case, the concept also applies to professional services companies that create these centres to serve several different customers.
- **Research and Development:** An organisational unit within a business group or a specialised entity focused on innovation, the development of new products, services, or technologies, and the continuous improvement of existing solutions. These centres invest in research activities, prototyping, and testing to enhance competitiveness and drive long-term growth. R&D centres may serve internal company needs or collaborate with external partners, including universities, research institutions or industry stakeholders.

This study targeted organisations with one or more service centres operating in Portugal and exporting all or part of their services. Those that only provide services for customers in Portugal were not included.

## Primary Research

The study is based on the results of primary research conducted between December 2024 and January 2025.

- An online survey delivered to 217 organisations, with 126 respondents
- Eight in-person interviews with the top management of service centres

## Industry Size Estimate

AICEP develops continuous and close work with the companies in this industry, supporting new and existing business centres in the country.

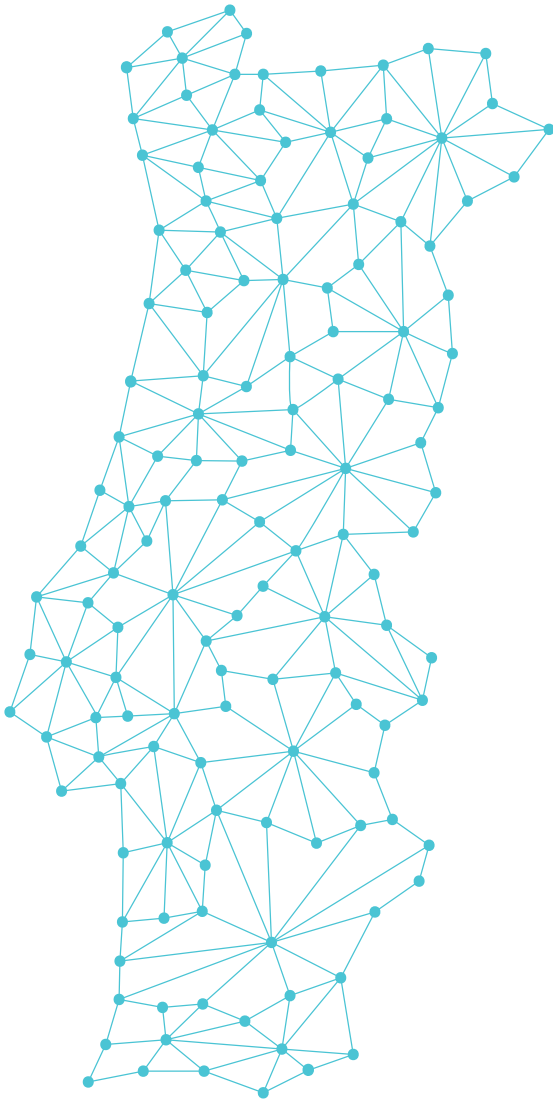
Therefore, the industry's figures are based on AICEP's data and estimates from the previous 10 years. These are based not only on direct contact with the organisations but also on information gathered from multiple sources, such as press releases, job offers, and media.

All data is kept fully confidential and for statistical purposes only. It does not reflect an accurate or extensive overview of the industry, though it does provide an estimate of its current size.



# Country: Key figures

## INTRODUCTION



Population 2023: **10,639,726** (Source: Statistics Portugal)

GDP growth 2024: **1.9%** (Source: Statistics Portugal)

Unemployment rate 2024: **6.4%** (Source: Statistics Portugal)

Inflation 2024: **2.7%** (Source: Statistics Portugal)



## TALENT POOL

Students in higher education (2023/2024):  
**448,235** (Source: Ministry of Education, Science and Innovation)

Graduates (2023): **95,608** (Source: Ministry of Education, Science and Innovation)

STEM: **~30%** (Source: Ministry of Education, Science and Innovation)

Foreign students (2023/2024): **73,339** (Source: Ministry of Education, Science and Innovation)

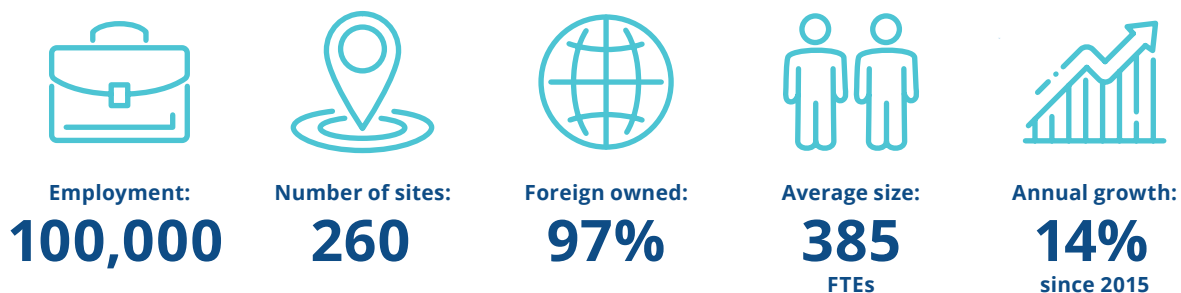
Universities: **97** (2024) (Source: Ministry of Education, Science and Innovation)



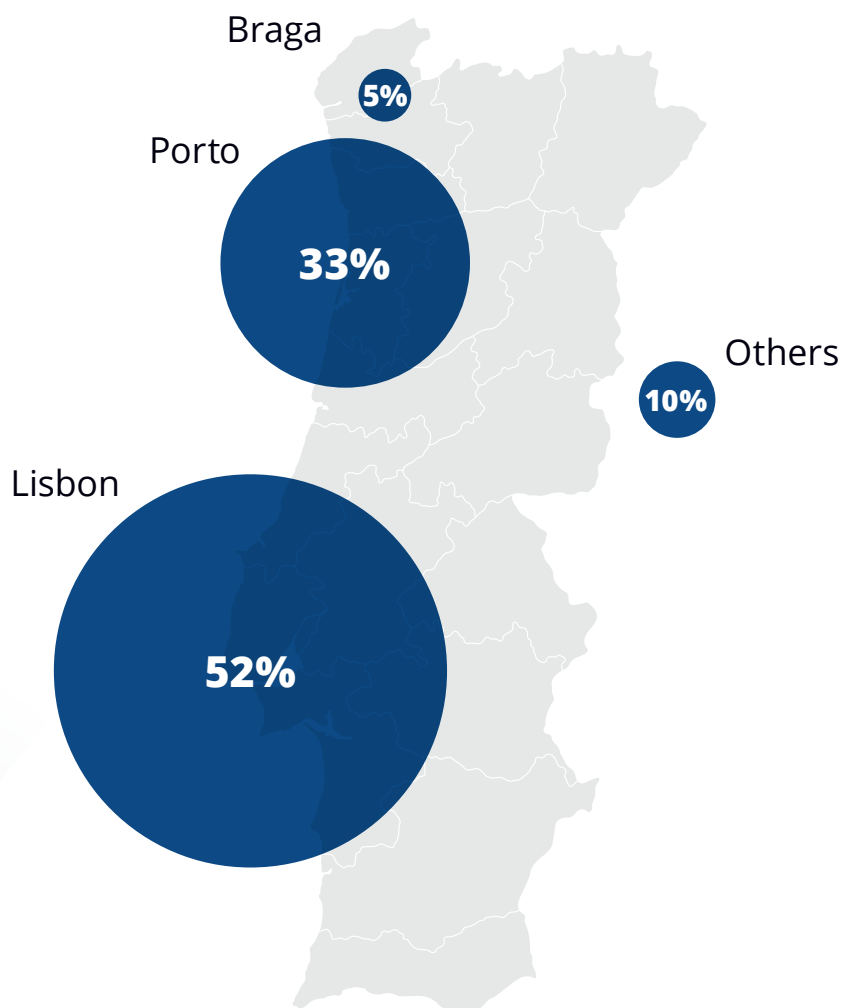
**A highly educated workforce with multilingual skills, competitive operational costs, and a safe and pro-business environment make Portugal an attractive location for business services.**

# Industry: Key Figures

## INTRODUCTION



Regional distribution (number of sites):



Source: AICEP

# SURVEY RESULTS





# Location Is Key

## SURVEY RESULTS

### Skilled talent continues to be the driving force behind Portugal's attractiveness.

The study highlights that companies choose Portugal mainly because of the availability of skilled local talent, competitive costs, and a multilingual workforce. Geographic location, safety, and a favourable time zone are also important considerations.

Portugal's education system plays a key role in providing a workforce with the skills needed for business service roles. Many professionals are not only well-trained but also adaptable and reliable, which are valuable assets for international operations. The country's multilingual talent, with many people fluent in languages such as English, Spanish, and French, helps businesses easily connect with global markets, while benefiting from cost-effective operations.

The country's geographic location within Europe allows businesses to operate in the same time zones as key markets, simplifying communication and coordination. Portugal is also known for its safety and stability, which provide a solid foundation for companies looking to establish or grow their operations. The local culture and hospitality make it easier for international employees to feel at home, creating a welcoming environment that supports both businesses and their teams.

### What were the main reasons to choose Portugal as a location for a service centre?



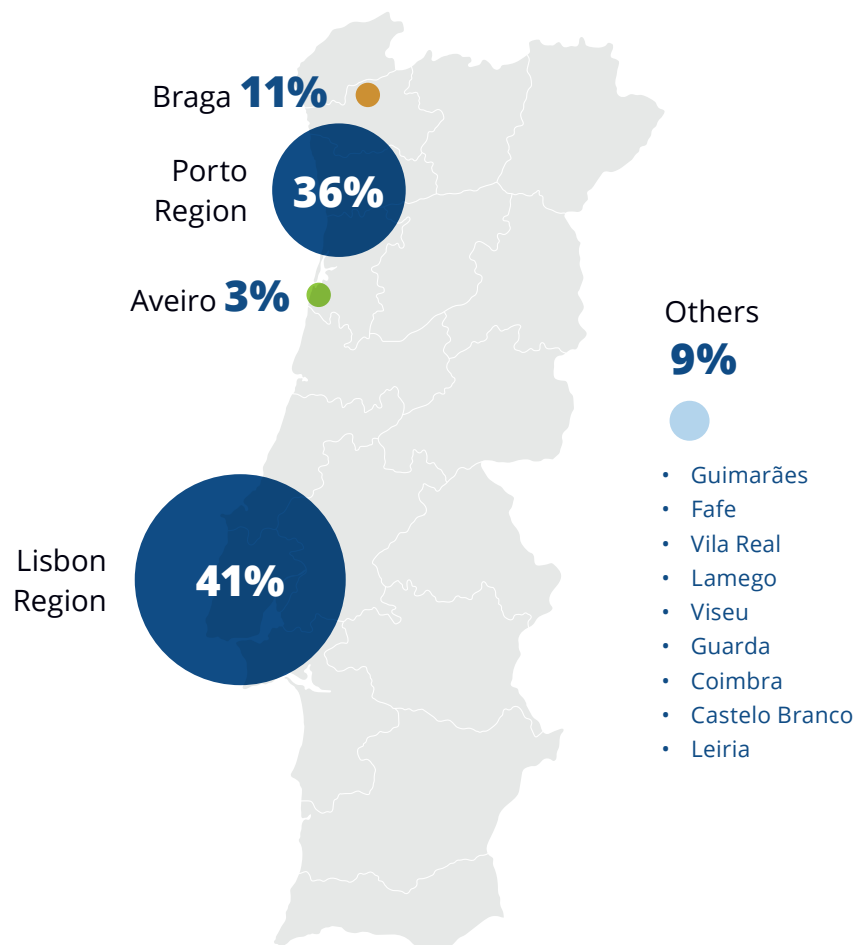
Source: IDC Business Service Centres Survey (n = 69)

## Expanding to 2<sup>nd</sup> Tier Cities Continues to Be the Trend

The data shows that most centres in Portugal are based in Lisbon and Porto, with these two cities remaining the main hubs due to their large talent pools, strong infrastructure, and business networks. Braga is the third-largest location, showing strong growth after Lisbon and Porto. The city benefits from a strong university presence, a growing business environment, and lower operational costs compared to bigger cities. Aveiro follows in fourth place, offering access to skilled talent and proximity to major urban centres. The presence of business service operations in other locations suggests that some companies are expanding beyond main metro areas, driven by cost considerations, access to specific skills, or regional incentives.

At the same time, the rise of remote and hybrid work is opening new possibilities. This shift allows companies to tap into a wider talent pool, as they are no longer restricted to hiring talent exclusively in Lisbon or Porto. Professionals can work from other cities while remaining connected to central teams and gain a better work-life balance outside major metropolitan areas.

### Where are your service centres located?



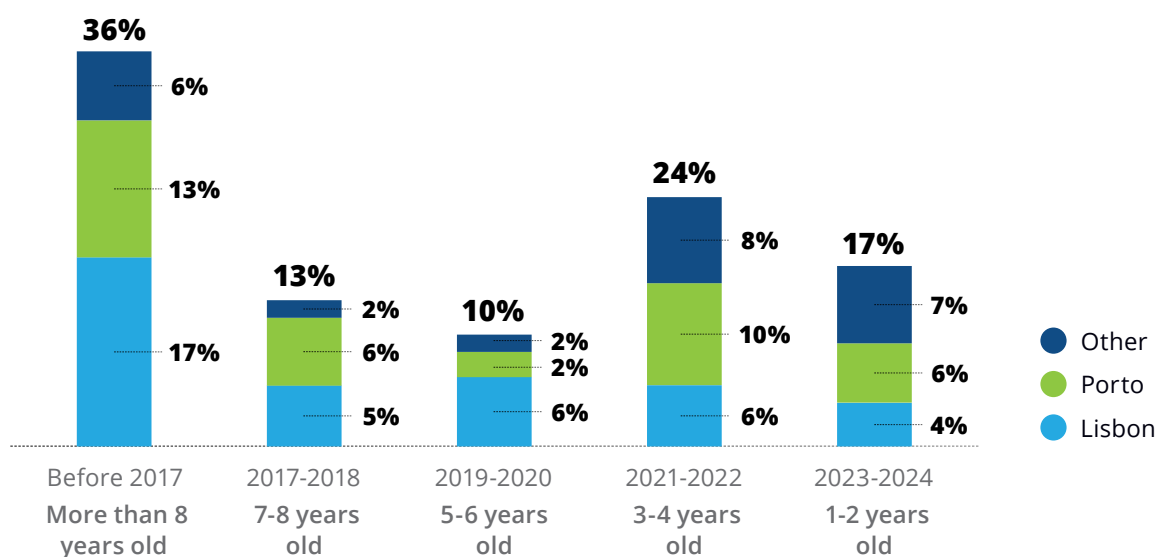
Source: IDC Business Service Centres Survey (n = 117)

## The Number of Centres Continues to Grow

Before 2017, most centres were set up in Lisbon and Porto, while other regions had fewer operations, showing that companies initially favoured the capital. Between 2017 and 2022, the number of new centres established each year remained relatively stable, with only a slight dip in 2019-2020. Since 2021, business service centre growth has remained steady, with 40% of all centres established in the last four years.

Beyond Lisbon and Porto, more locations have seen new operations, signalling a gradual expansion to other cities. The need for a broader talent pool is a key factor behind this shift. This trend continued into 2023 and 2024, with remote and hybrid work also playing a role, allowing companies to hire beyond the main hubs and establish operations in regions offering better costs and access to talent.

### When was the centre established? (% of centres established in the period)



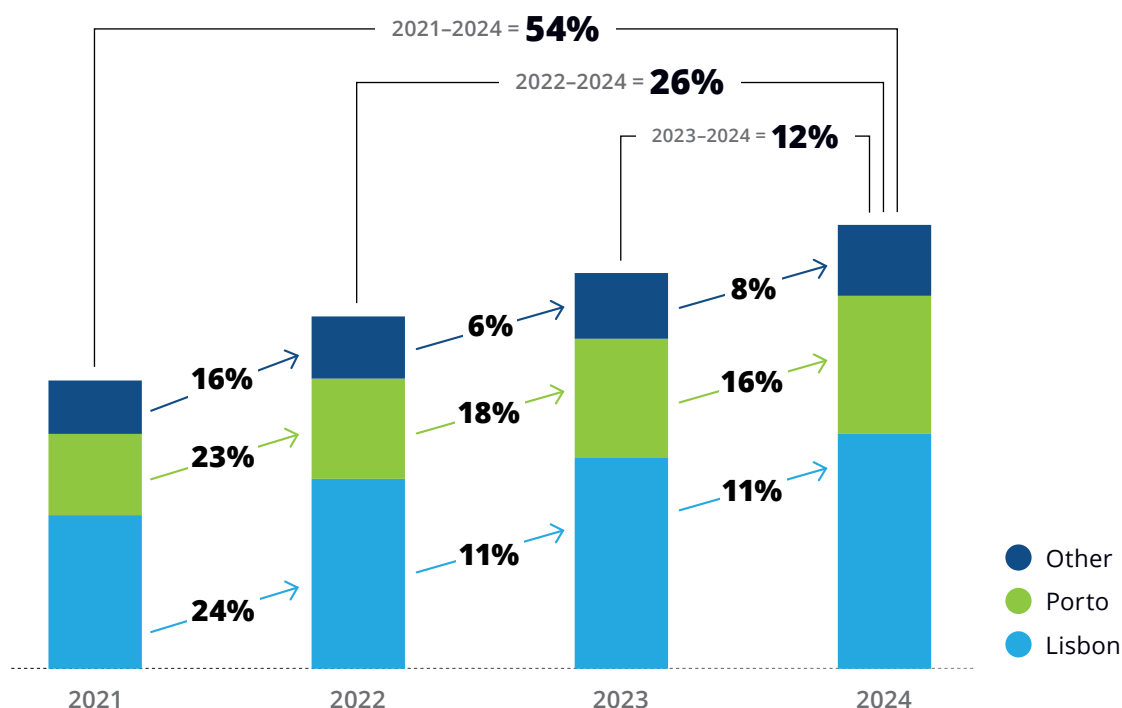
Source: IDC Business Service Centres Survey (n = 94)



## Business Service Centres Workforce Growth Continues

Hiring across the globe increased sharply after the pandemic as businesses expanded and adjusted to new ways of working, according to the [OECD](#) Economic Outlook report. In the following years, economic pressures such as inflation, rising labour costs, and global hiring slowdowns led to a more cautious approach. Instead of large-scale expansion, companies have prioritised efficiency and optimising existing teams. However, in Portugal, the headcount have been increasing significantly, across all regions over the years, registering a growth of 54% in the last four years. Between 2022-2024 the two main metropolitan areas of Porto and Lisbon showed a more stable growth, while Other regions experienced a slight intensification in headcount expansion.

### What has been the evolution of the number of workers in each centre?



Source: IDC Business Service Centres Survey (n = 90)



**Business services centres employment has continued to grow across all regions. The most notable increase between 2023 and 2024 occurred in Porto metropolitan area.**

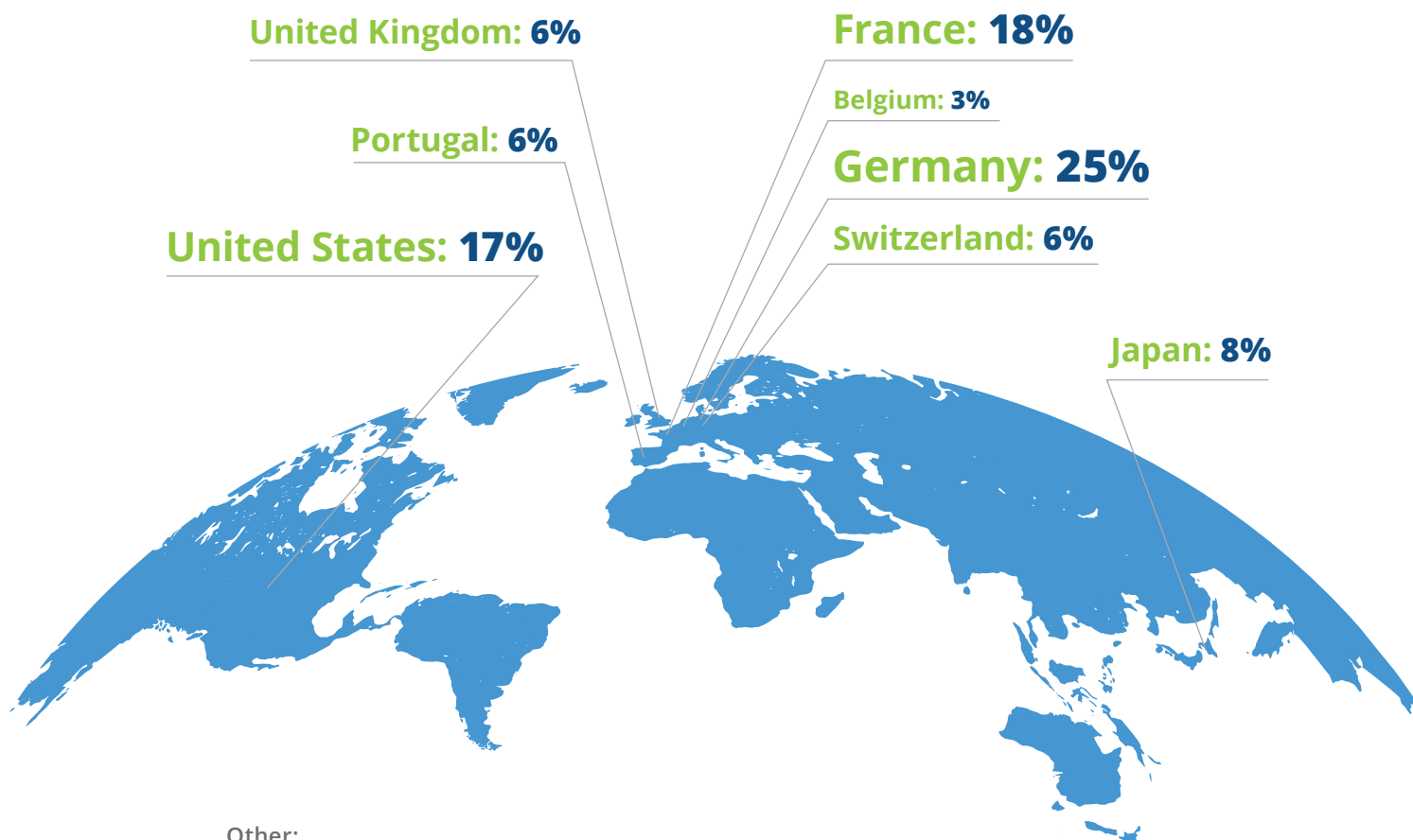
# Location Is Key

## SURVEY RESULTS

### Portugal is still a favourite choice for European companies.

The study shows that most of the centres in Portugal are operated by companies headquartered in Europe. The top two countries are Germany and France, with 25% and 18% of the total number of centres, respectively. Outside Europe, the U.S. excels as the top investor with 16%, followed by Japan, which accounts for 8%. Overall, the vast majority of business services in Portugal, are foreign owned (94%) showing the country's strong appeal to international companies.

#### \*What is the country of origin of your organisation?



Other:

**Denmark, Ireland, Spain, Sweden: each country at 2% each**  
**Austria, Netherlands, India, Israel, Morocco: 1% each**

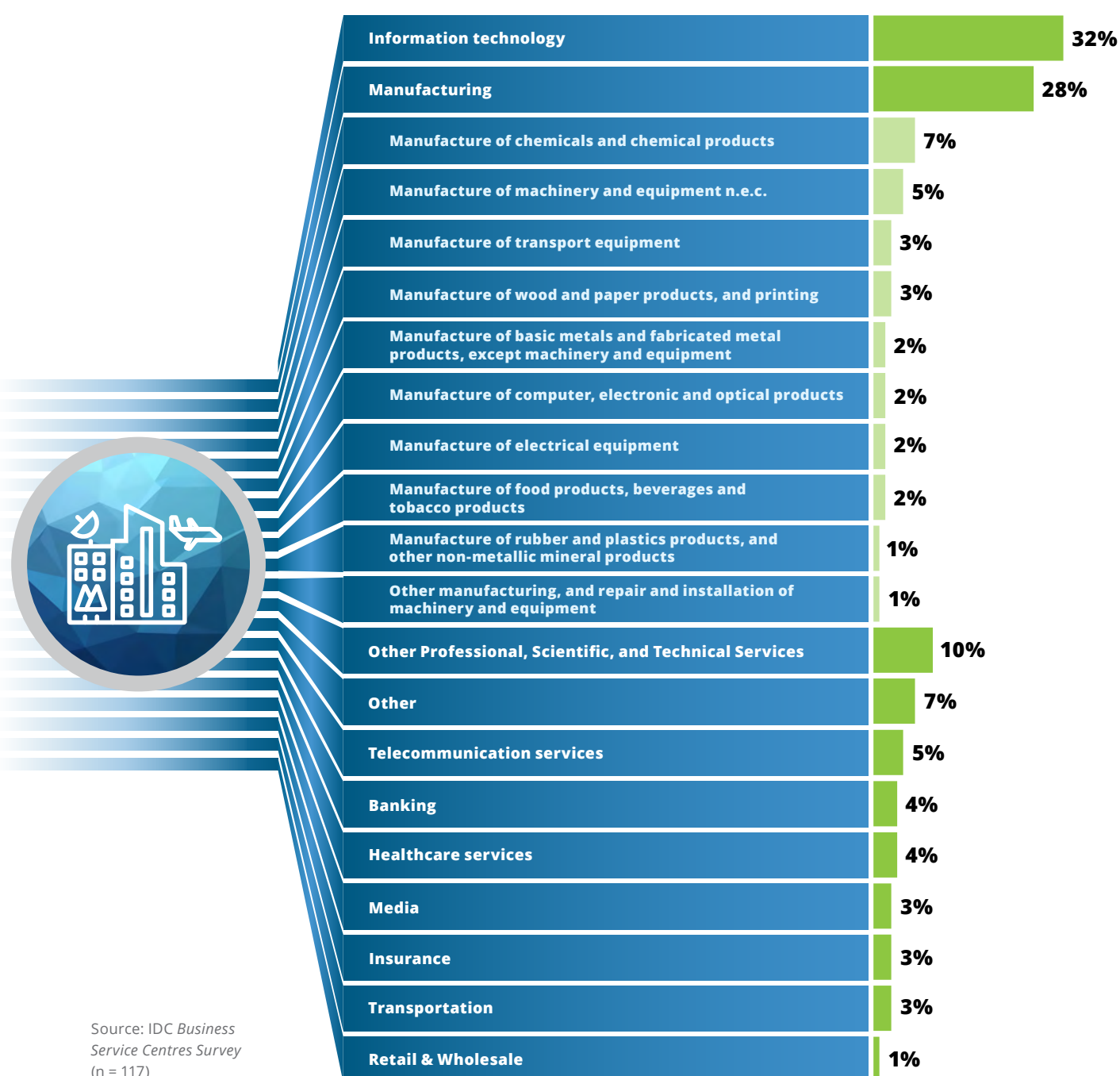
Source: IDC Business Service Centres Survey (n = 117)

\*The number adds up to 102% due to rounding of percentages

## IT and Professional Services Companies Are the Leading Investors

The study shows that IT is the most common industry among companies with business service centres in Portugal, making up nearly one-third of the total. Many of these centres focus on software development, IT service management, and technical support. Manufacturing also represents a significant share, accounting for 26% of the centres. Other industries with a strong presence include professional services, banking, insurance, telecommunications, and healthcare. These sectors centralise operations to improve efficiency and support other business units globally, making Portugal a practical choice for companies looking to serve European and global markets.

### What is your parent company's industry?



Source: IDC Business Service Centres Survey (n = 117)



# Coverage and Scope

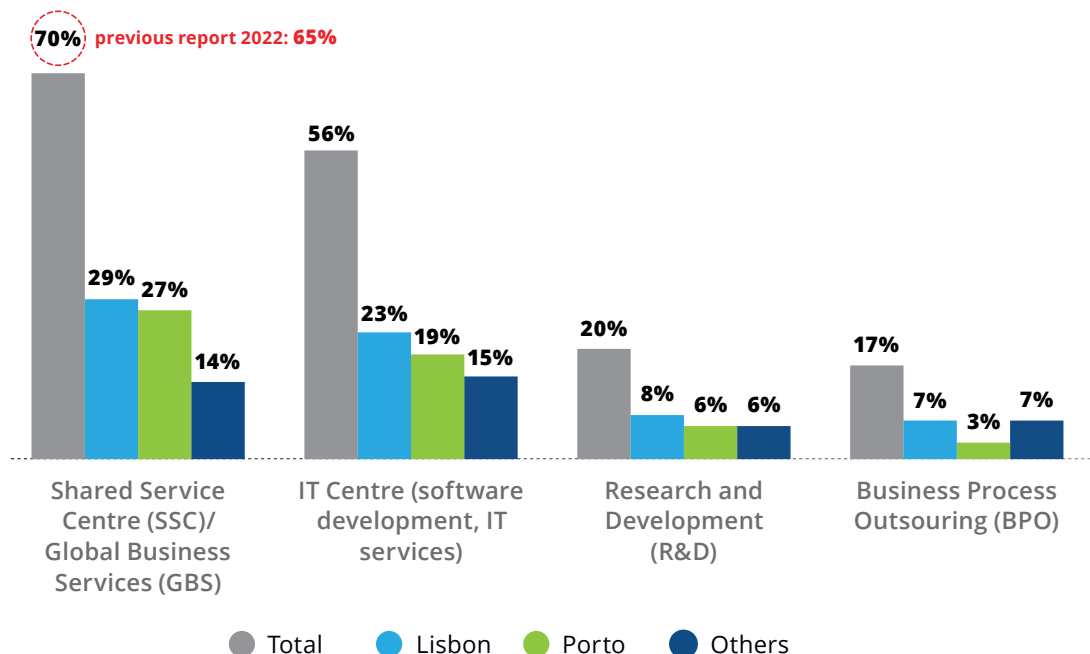
## SURVEY RESULTS

### Shared Services and IT Lead the Business Services Landscape

The data shows that the Global Business Service (GBS) centre footprint is predominant (70%) in Portugal, followed by IT centres, which account for 56% of the total.

While SSC and GBS centres are mostly based in Lisbon and Porto, IT and R&D centres are more widespread, showing that companies may be looking beyond the main hubs for specialised talent. BPO centres also have a presence, though they remain a smaller part of the business services centres landscape.

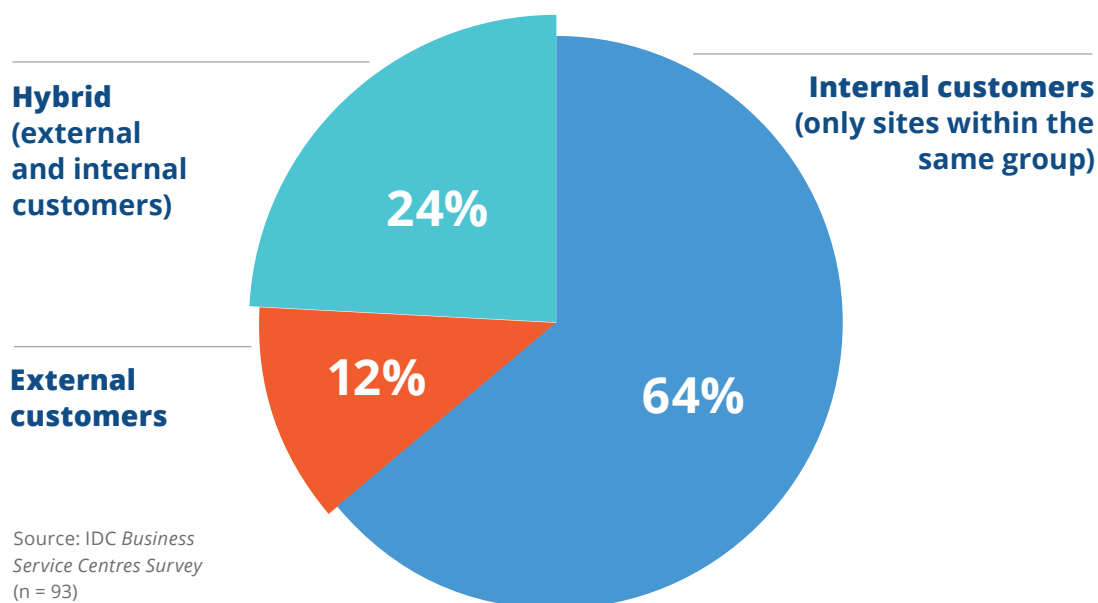
### Which of the following best define the type of your service centre in Portugal?



Source: IDC Business Service Centres Survey (n = 117)

The data shows that most centres in Portugal are designed to serve internal customers, confirming that captive shared services continue to dominate. Compared with the previous study, the proportion of centres serving exclusively internal clients increased from 51% to 63%. In contrast, hybrid centres, those combining internal and external customers, dropped significantly from 25% to 12%. Centres serving only external customers remained stable at around 24%.

### What type of customers are your service centres targeting?

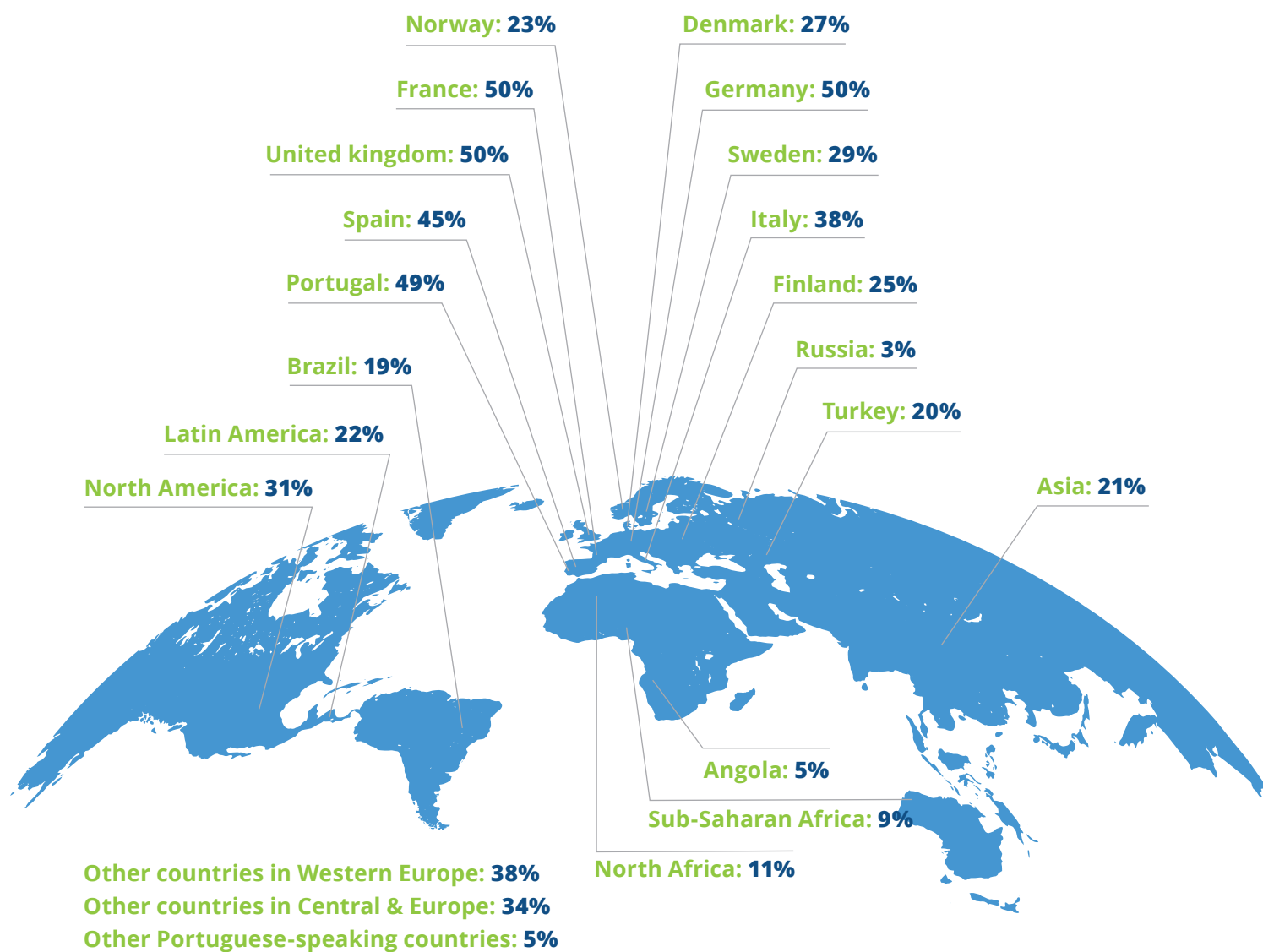


## Operations Primarily Serve Europe, with Expansion Towards a Global Reach

The centres in Portugal primarily serve Western Europe, with France, Germany, the U.K., and Spain as key markets. They are followed by countries in Central and Eastern Europe (CEE) and North America, which also benefit from Portugal's favourable time zone.

Due to the maturity of certain operations, regions such as Latin America and Asia are also within scope. In this sense, the trend confirms that while Europe remains the priority, the geographic coverage of most centres is expanding to other parts of the globe, with 43% of them with global reach.

### Which are the countries or regions served by your centres?



Source: IDC Business Service Centres Survey (n = 80)



## Global Reach Drives the Need for Multilingual Centres

Language skills are a key factor in why companies choose Portugal, as reflected in both the survey results and interviews.

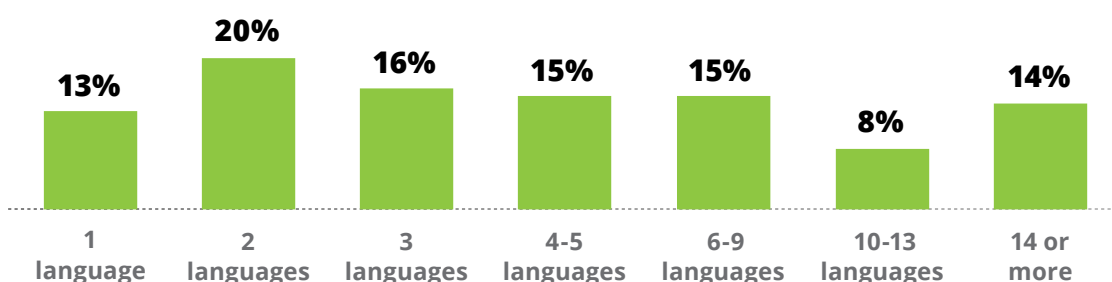
**AVERAGE NUMBER  
OF LANGUAGES:**

**7**



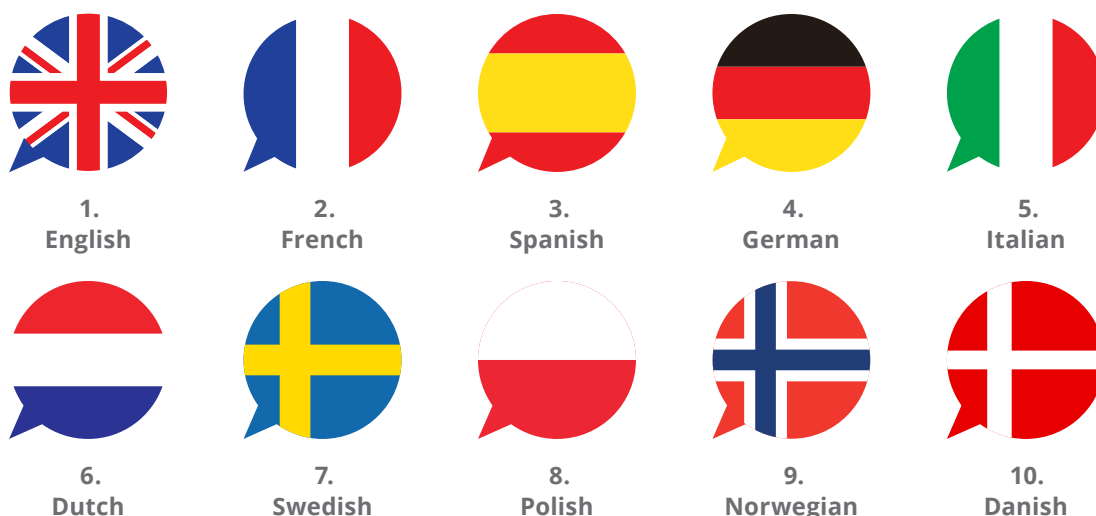
Most centres in Portugal handle multiple languages, with 20% of respondents indicating two languages, 16% three languages, 15% four to five languages, and a notable share managing 14 or more. In general, the average number of languages is 7, which represents an increase when compared to the previous edition in 2022 (6).

### In how many languages does your centre operate?



Source: IDC Business Service Centres Survey (n = 80)

### Top languages spoken by number of FTE



Source: IDC Business Service Centres Survey (n = 62)

## Demand Is Increasing for More Specialised Functions

According to the survey results, Finance & Accounting, Software Development and Human Resources are the primary driving business functions in Portugal, each increasing by more than 10 percentage points, when compared to the previous report. Beyond expanding their traditional scope, these centres are also building value-added capabilities, such as data analytics, which has grown from 33% to 58%, marketing from 37% to 50%, and R&D from 16% to 24%. Digital capabilities are also seeing increased focus.

Does your centre perform the following functions?



Source: IDC Business Service Centres Survey (n = 66)

In what concerns FTEs distribution per function, the survey results reveal that Customer Service has the largest share, mostly driven by its concentration in a reduced number of BPO centres. This is followed by Software Development and Finance & Accounting, which also play a significant role, mostly in captive centres.

Overall, organisations have been handling multiple business functions, increasing in its scope, geographic coverage and added value.

How many workers, approximately, provide services in the following functions?



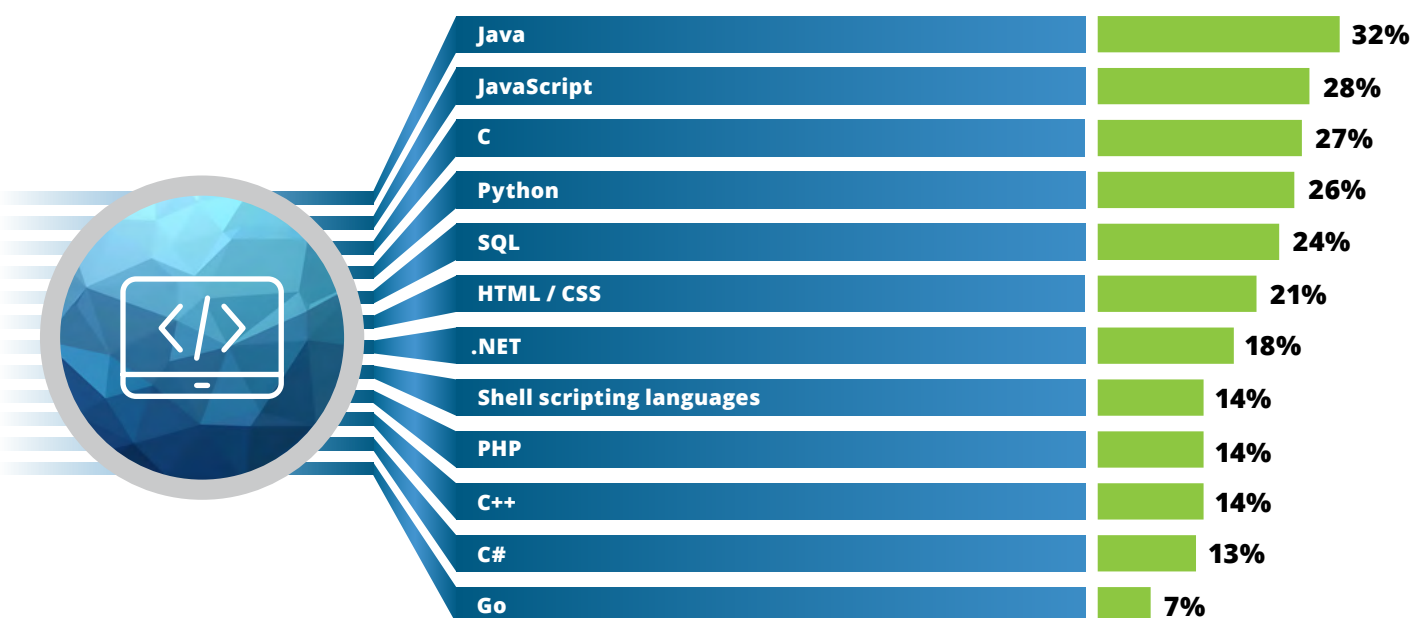
Source: IDC Business Service Centres Survey (n = 66)

## Programming Languages Reflect Demand for Automation and Web Services

Java, JavaScript, and C are the most widely used programming languages due to their role in enterprise software and web development.

Python and SQL are also common, pointing to a strong focus on data processing and automation. .Net and C# are used in many centres, likely due to the presence of Microsoft-based systems, while PHP and Shell scripting suggest a mix of web development and system administration.

### In the case of an IT service centre, which programming languages are used?



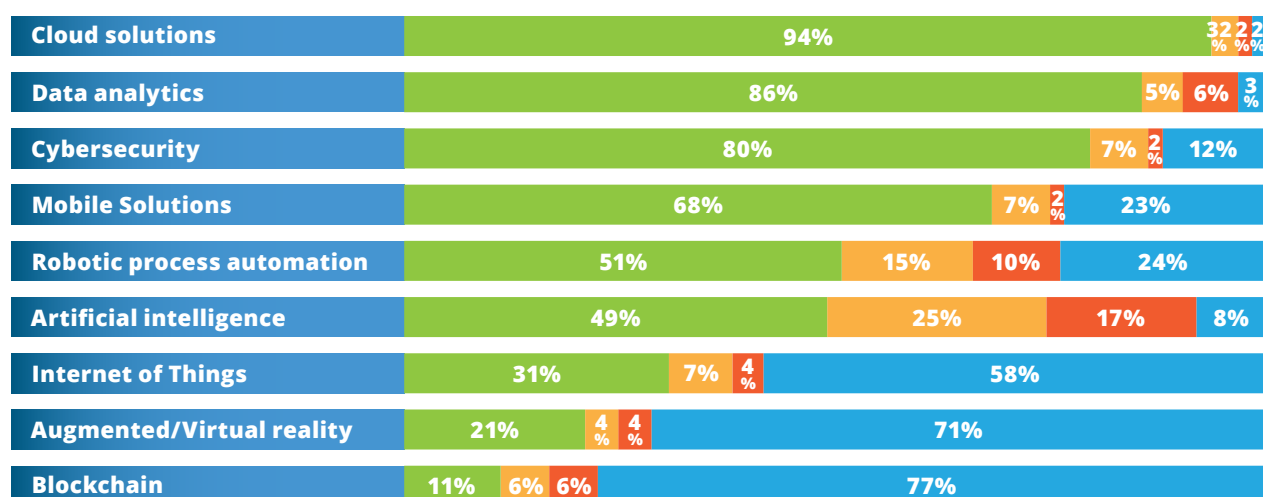
Source: IDC Business Service Centres Survey (n = 58)

## AI Adoption Rises as Centres Move Beyond Cloud Implementation

Most centres in Portugal are increasing their maturity level in terms of technology readiness, with cloud solutions, data analytics, and cybersecurity at an advance stage of implementation.

Robotic process automation (RPA) and AI technologies are demonstrating an impressive growth of implementation, particularly when compared with the last edition of the report. The survey also shows that AI remains the leading technology in the 'under implementation' phase, indicating that more companies are actively finding ways to integrate it into their operations. In fact, in the previous edition of the study, 33% were in the "under implementation" phase—a figure that has now decreased to 25%—demonstrating that the current 49% fully implemented is the result of this successful transition.

### Which of the following digital technologies are implemented, or planned to be implemented, in your service centre to support operations?



● Implemented
 ● Under implementation
 ● Planned for the next 12 months
 ● Not planned

Source: IDC Business Service Centres Survey (n = 67)

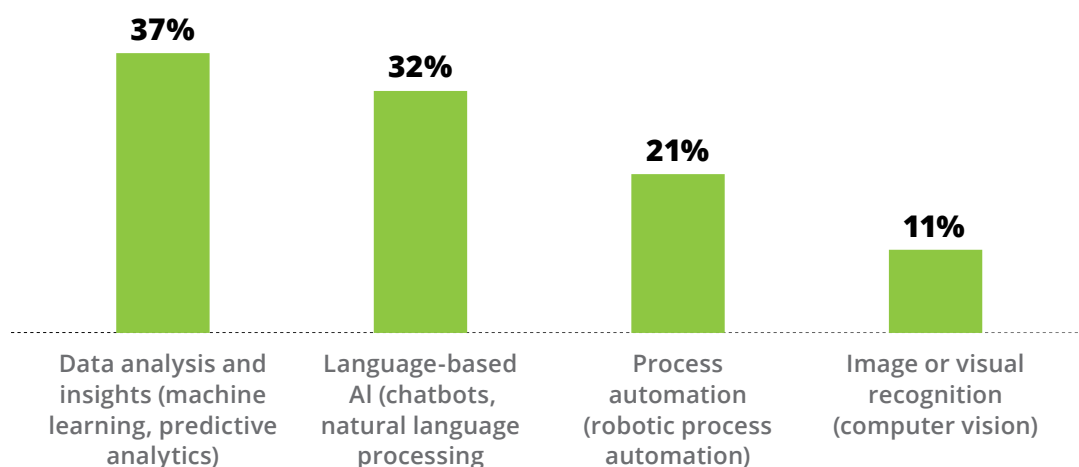


## AI Adoption Is Focused on Practical, High-Impact Areas

Regarding technology implementation, the adoption of AI has gained significant traction and is now being widely implemented across centres in Portugal, as illustrated in the previous chart. Given this significant progress, understanding which specific AI technologies have been adopted over time is particularly valuable. For this reason, and for the first time in the study, we asked respondents to specify the exact technologies they are using in their centres.

According to the survey, AI is mainly used for data-driven decision-making and automation. Machine learning (ML) and predictive analytics are the most common applications, used by 37% of centres. Language-based AI, like chatbots and natural language processing (NLP), is also widely adopted (32%), particularly in customer service and multilingual support; 21% of centres already implemented RPA solutions, mainly for automating transactional tasks. Image and visual recognition have the lowest adoption at 11%, indicating that AI in business services centres remains primarily focused on data processing rather than advanced visual analysis in daily operations.

### Which types of AI technologies are currently being used in your centre?



Source: IDC Business Service Centres Survey (n = 46)

# ABSL PORTUGAL

## MISSION

At ABSL Portugal, we envision a future where Portugal is at the forefront of business services excellence, attracting investment, talent, and innovation. Our mission is straightforward: **To be an advocacy voice of the relevancy of the Portuguese Sector of Shared Service Centers / Global Business Services as well as its impacts in the country.**

## GOALS

- Establish a strengthen relation with the Portuguese Government and other public administration authorities.
- Collaborate with national authorities and agencies (e.g., AICEP) to optimize regulation, legal framework and working conditions for the sector.
- Give visibility to the sector through job promotion and tax optimization.
- Cooperate with universities to promote talent development.
- Promote, directly or indirectly, activities that support the visibility and the reinforcement of business services activities in Portugal or abroad.
- Establish various protocols for the benefit of its members and employees.

## VALUES

Everything we do at ABSL Portugal is underpinned by a strong set of **core values**:

- **RESPECT & TRUST:** We maintain a relationship of trust and respect with all stakeholders and rely on our associates to make the best use of their skills to build a lasting relationship.
- **INTEGRITY:** The organization's actions follow a Code of Conduct and all associates have a duty to act honestly, following the principles of the law, with transparency and not admitting any wrong behaviour.
- **REPRESENTATIVENESS:** Be committed to defending and promoting the interests of ABSL.
- **CREATING VALUE:** Create value for the member Companies and their stakeholders. Deliver what've commit to through Innovation and focus on Country, the Industry, its Associates and their Collaborators.
- **COOPERATION:** We privilege cooperation and collaboration with public entities, the Government, national and foreign regulatory entities, as well as with international Institutions. In addition, we promote dialogue with companies in the same sector.

[www.absl.pt](http://www.absl.pt)

[contact@absl.pt](mailto:contact@absl.pt)

# Talent: Portugal's Most Valuable Resource

## Portugal Benefits from a Young and Skilled Workforce

Portugal's service centres attract a diverse and highly skilled workforce, with a strong presence of foreign nationals and a highly educated talent pool. As these centres provide services worldwide, they rely on multilingual and internationally experienced employees.

Figures remain consistent with the previous edition of this report, with one notable change: The proportion of women in the workforce has increased significantly, from 42% to 54% in just two years, highlighting progress in gender balance.



**54%**  
of female workers



**87%**  
of employees with  
higher education



**21%**  
of employees are  
foreign nationals



**34**  
is the average  
worker's age

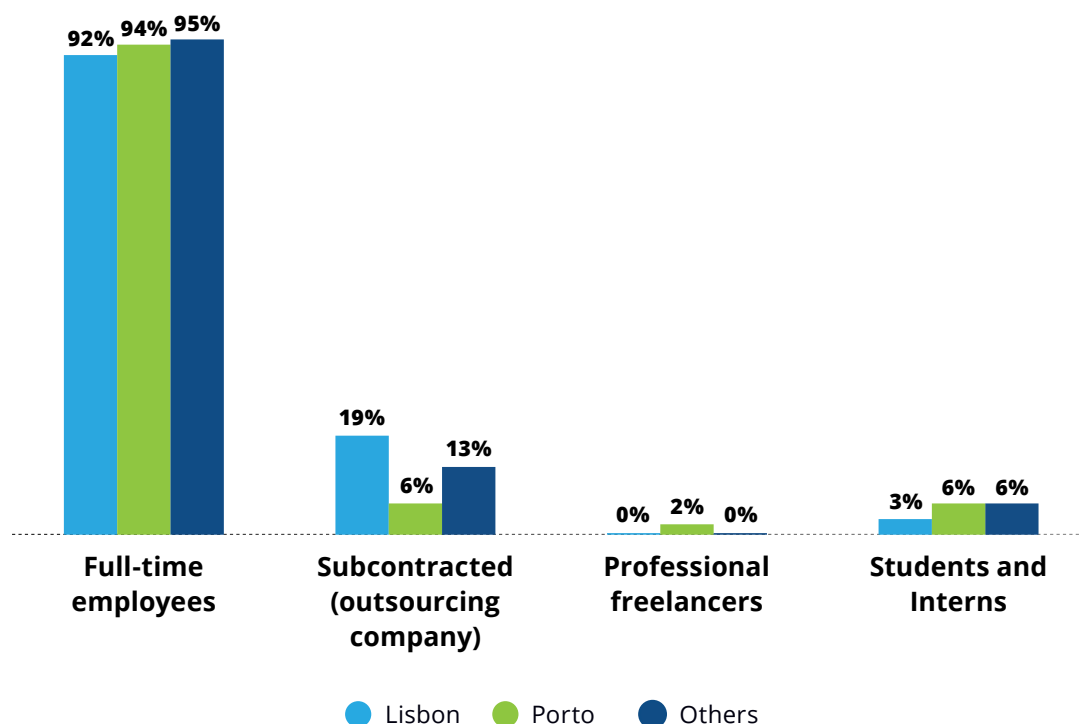
Source: IDC Business Service Centres Survey (n = 67)



## Centres Value Full-Time Employment for Stronger Company Integration

The survey results highlight that full-time employment is the preferred relationship with little variation across regions. As such, businesses generally prefer keeping professionals in-house rather than relying on third parties. Subcontracting is slightly more common in Lisbon than in Porto or other regions, likely due to the scale of operations and demand for specialised services. Freelancers are less frequently employed, suggesting that centre roles require stable, long-term employment. Interns and students make up a small but consistent part of the workforce, demonstrating the results of long-standing partnerships between centres and universities.

### What is the distribution of workers according to the following types of contracts?



Source: IDC Business Service Centres Survey (n = 81)



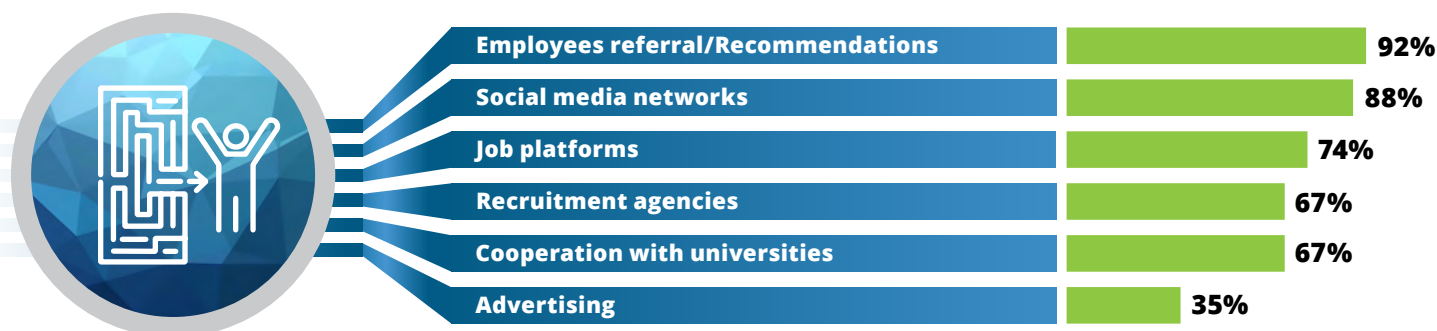
**The competition for talent in Portugal is increasing, and companies are putting more focus on creating a positive work culture and improving the employee experience according to the interviewed participants.**



## Employee Referrals Take the Lead as the Main Recruitment Channel

Business services centres in Portugal continue to prioritise network-based and digital recruitment strategies, and the ranking of preferred methods has shifted compared to previous studies. Employee referrals are for the first time the most common recruitment channel (92%), surpassing social media networks, which were previously the top choice. This suggests that companies place increasing value on internal recommendations and trust-based hiring. Strong ties with universities (67%) indicate an ongoing effort to invest in young talent for long-term workforce growth.

### What talent recruitment methods does your organisation follow?



Source: IDC Business Service Centres Survey (n = 66)

The average attrition rate is now 12%, showing a slight improvement compared to the 14% reported in the previous study. Lisbon continues to record a slightly higher rate than the national average at 14%, while Porto remains lower at 11%.



**Although there has been progress, attrition remains a significant topic for business service centres, reinforcing the need to maintain a strong focus on talent management, retention strategies, and workplace attractiveness to remain competitive.**

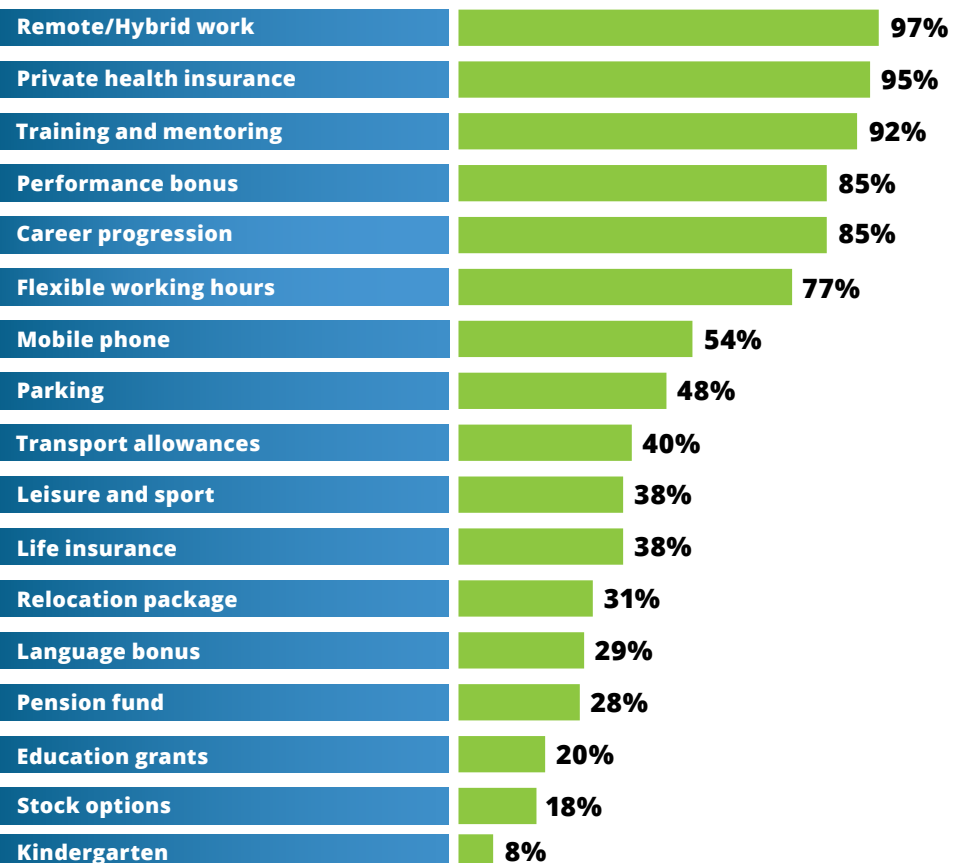
## Flexible Work, Career Growth, and Financial Incentives Are the Most Common Employee Benefits

Employee benefits continue to play a key role in attracting and retaining talent in Portugal. Compared to the previous report, this survey highlights a shift in priorities, with remote and hybrid work emerging as a newly ranked benefit and now the most common at 97%. This reflects how remote work has become standard and remains highly valued by employees.

Training has gained even more importance, increasing from 86% to 92%, reinforcing companies' focus on upskilling and long-term retention. Performance bonuses have also grown slightly, from 80% to 85%, while private health insurance remains widely offered, rising from 92% to 95%.

On the other hand, language bonuses have dropped slightly, from 31% to 29%, although they remain an important tool for attracting multilingual talent. Despite salary increases, companies continue to offer a variety of benefits to stay competitive in the area of hiring and retention.

### What are the main non-mandatory benefits offered to workers?



Source: IDC Business Service Centres Survey (n = 66)



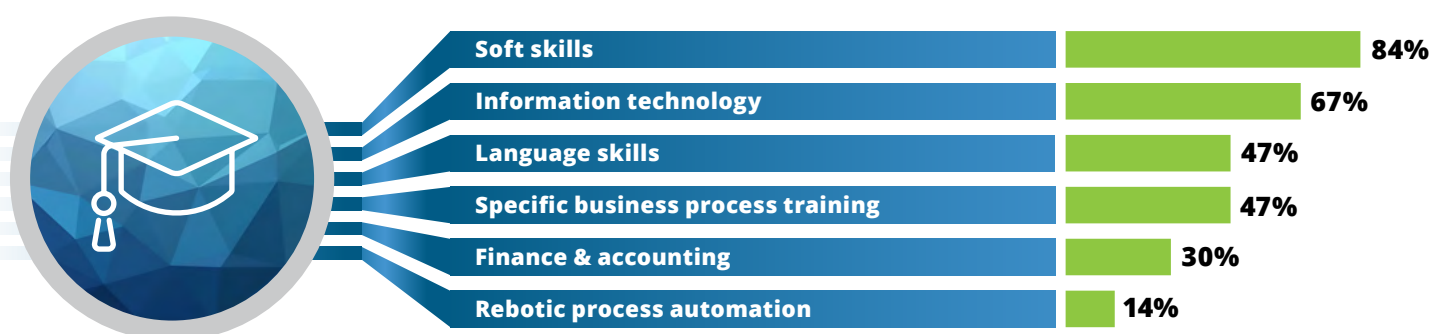
Over the past three years (2021–2023), salaries in this industry have grown at an average annual rate of 5.6%. In 2023 alone, the increase reached 6.2%. Even with this upward trend, Portugal remains an attractive destination, offering a highly educated talent pool and competitive salary levels.

## Soft Skills as a Top Priority

Reinforcing the value of soft skills becomes increasingly prominent in driving performance, innovation, and continuous improvement. Soft skills, such as communication and teamwork, are the most in-demand training needs, according to the respondents, highlighting the need for employees capable of working in multicultural and cross-functional environment.

IT training is a key focus, driven by the acceleration of digital transformation and the central role technology plays today. Many companies also invest in business processes and language training to further strengthen their capacity in servicing globalised companies.

### What are the main training needs?



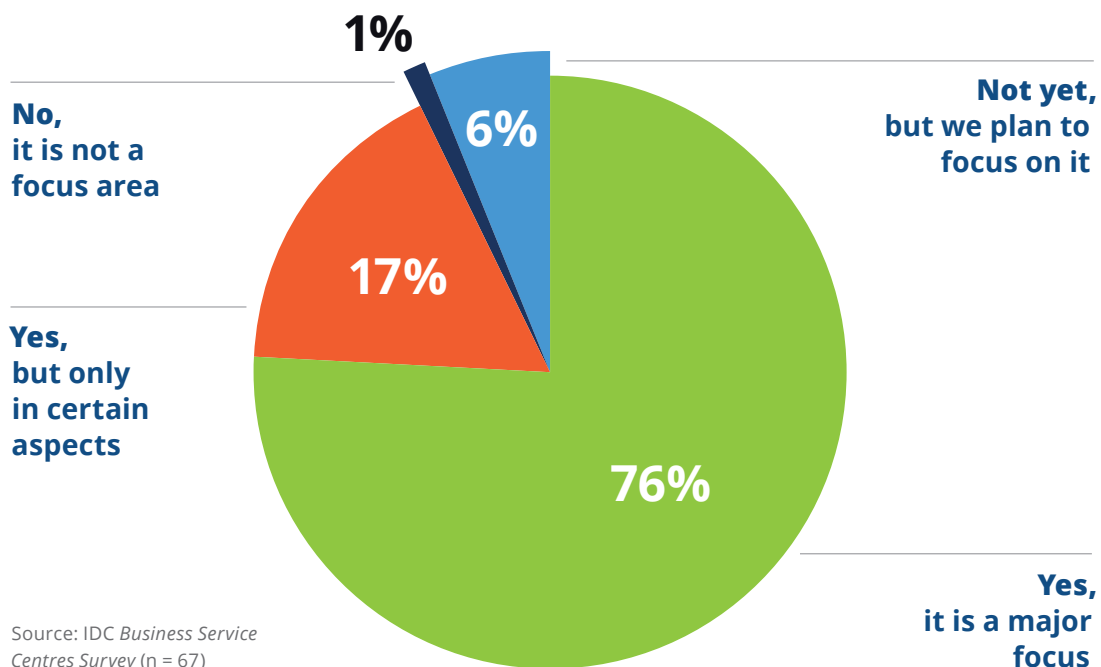
Source: IDC Business Service Centres Survey (n = 64)



## Diversity & Inclusion and Ethical Practices lie at the core of the ESG strategy

With ESG emerging as a central element of corporate strategy, this edition of the study explores for the first time companies' openness and approach to ESG practices. More than two-thirds (76%) of companies have integrated ESG into their strategy, placing particular emphasis on diversity and inclusion (92%), ethical business practices (86%), and reducing their carbon footprint through cloud migration (81%). While most organisations take a broad approach to ESG, areas such as waste reduction, renewable energy, and sustainable finance are currently gaining traction. Overall, the findings confirm that ESG is becoming a core component of business strategy within this sector.

## Is environmental, social, and governance (ESG) a focus in your organisation's strategy?



## Which ESG areas are a priority?





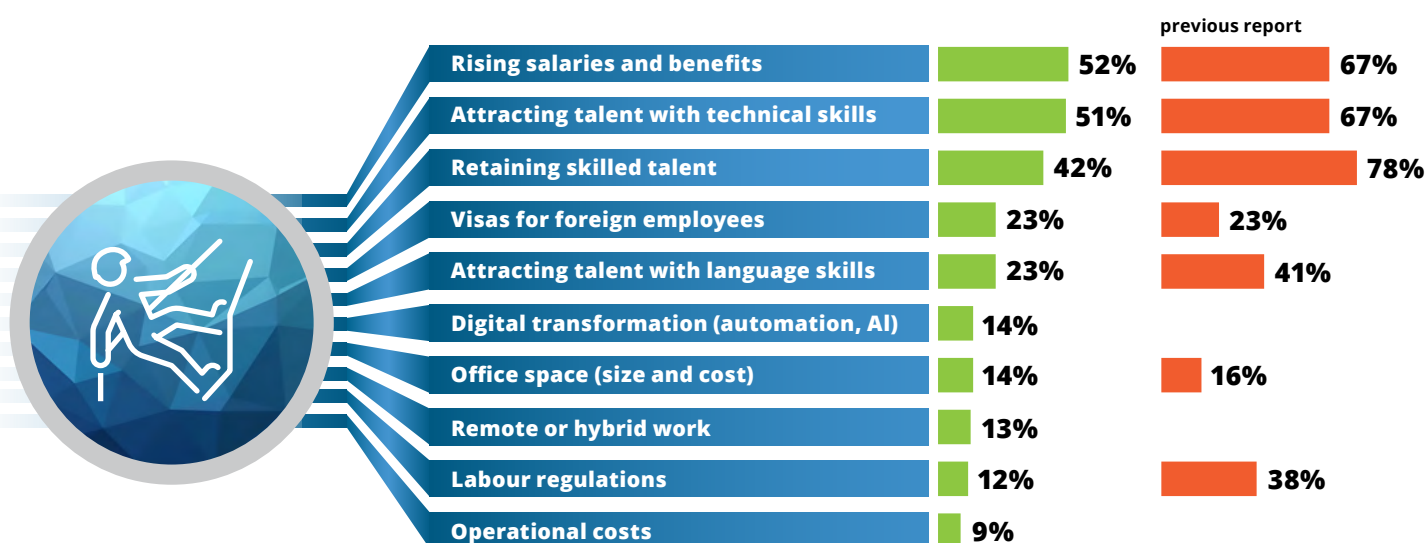
# CHALLENGES AND FUTURE PLANS



## Centres Must Adapt to Hiring Challenges

As the industry continues to mature, understanding the challenges it currently faces becomes increasingly important for future readiness and strategic planning. According to the survey, rising salaries, attracting technical skills and retaining talent were the main challenges highlighted by the respondents, with 52%, 51% and 42%, respectively.

### In your opinion, what are the main challenges your organisation is currently facing?

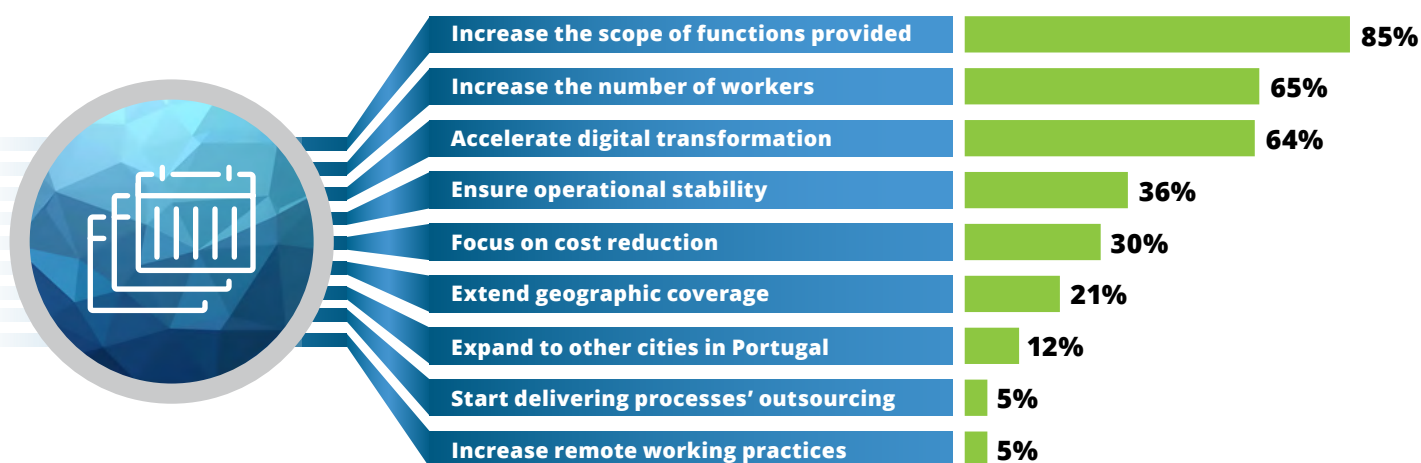


Source: IDC Business Service Centres Survey (n = 69)

## Service Functions and Digital Transformation Advance as the Industry Grows

Looking ahead, the companies surveyed express strong confidence in the growth of their centres in Portugal, with plans to expand operations within various fields in the coming years. For the first time, expanding the scope of functions provided has emerged as the top priority for companies, followed by plans to grow their teams, reinforcing Portugal's position as a key business hub. Digital transformation remains a major priority, with businesses focusing on automation and efficiency to stay competitive. At the same time, ensuring operational stability is a key objective, as companies aim to strengthen their foundations before making major structural changes.

### How are you planning to develop your service centres in Portugal over the next 3 years?

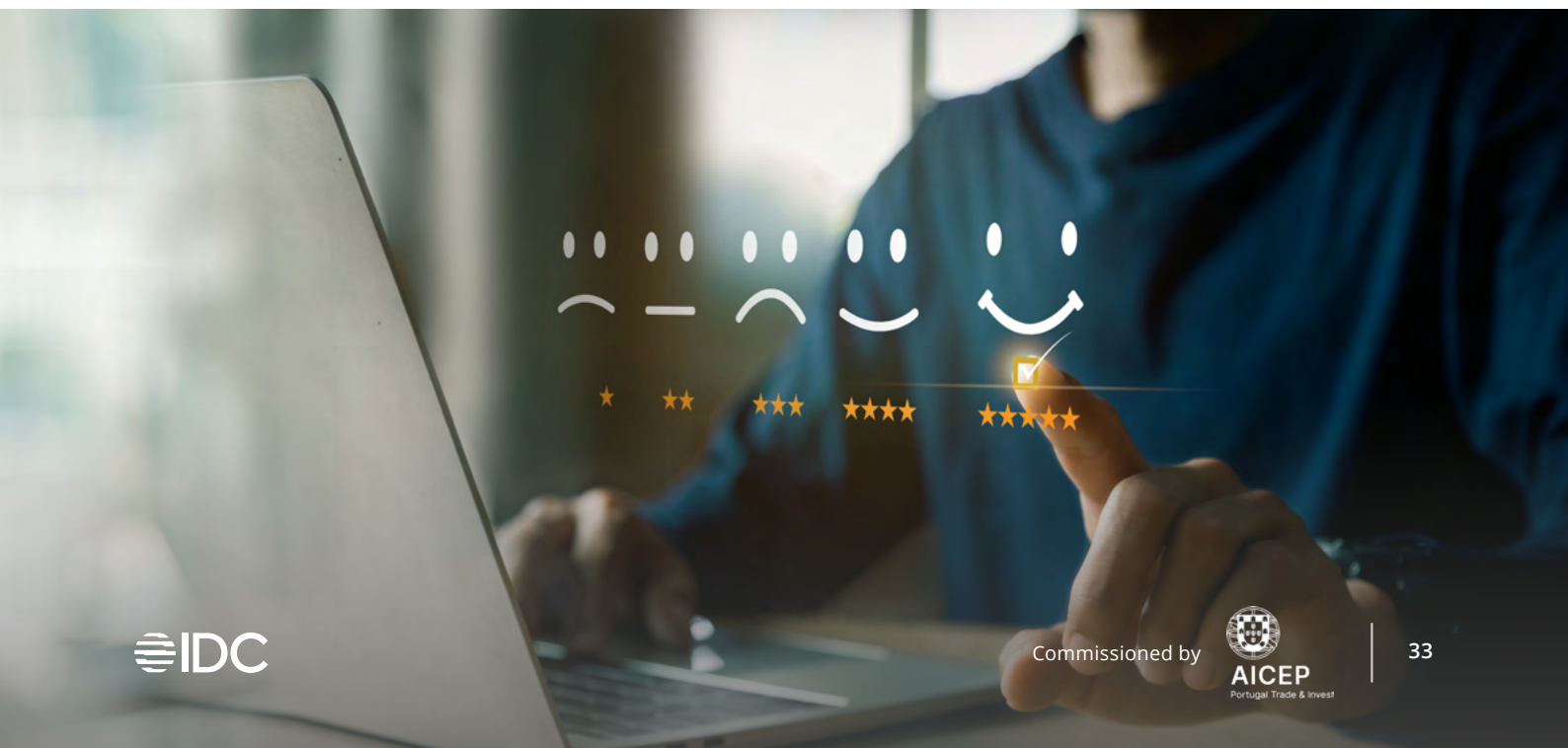
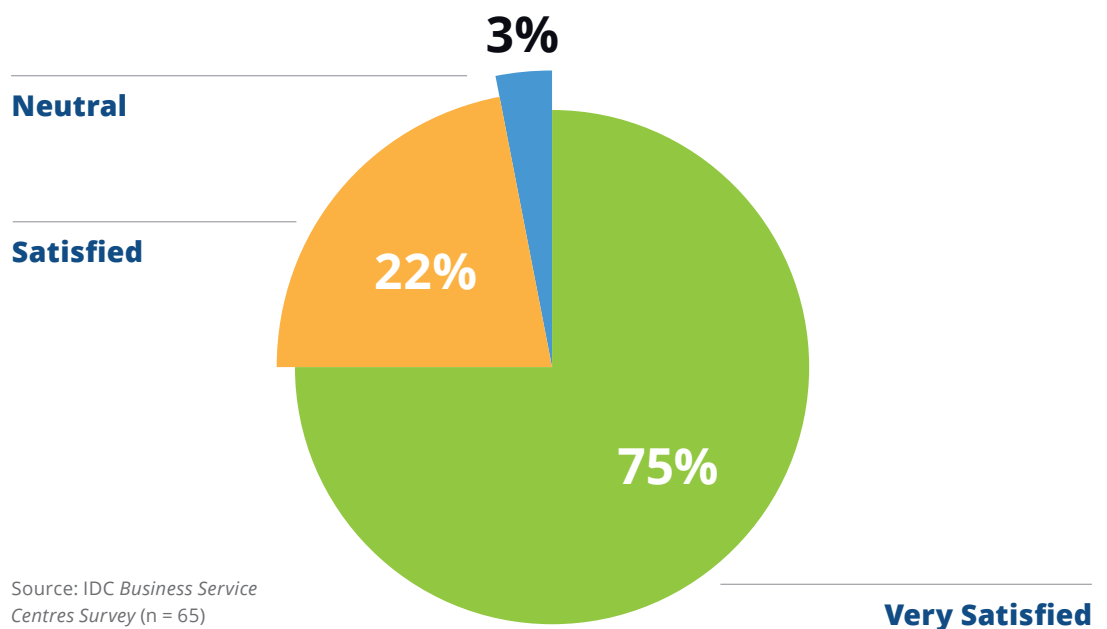


Source: IDC Business Service Centres Survey (n = 66)

## Centres in Portugal Are Reporting Unparalleled Levels of Satisfaction

Among the companies surveyed, the level of satisfaction remains high, with the vast majority considering the country a stable and reliable location for their service centres. The share of companies that are very satisfied has increased to 75%, up from 65% in the previous report, reinforcing Portugal's strong position as a business-friendly destination.

**In your opinion, how satisfied is your organisation with the service centres in Portugal?**





## Top-Tier Talent Powers the Success of Organisations in Portugal

As previously noted, one of the key factors in selecting Portugal for establishing a service centre is the quality of its talent. Survey respondents highlighted that professionals in Portugal are a major driver of success, valued not only for their technical expertise and language skills but also for their adaptability, commitment, and problem-solving abilities. These qualities contribute to the effective operation of the centres, resulting in strong performance and enhancing the services delivered, as evidenced by the chart below.

In fact, when compared to the previous report, a significantly higher number of respondents noted that talent is the main driver of success, rising from 51% to 89%.

### What are the main factors for the success of your service centres in Portugal?



Source: IDC Business Service Centres Survey (n = 65)

Service centres in Portugal continue to grow and adapt, supported by a skilled workforce, a stable business environment, and an expansion beyond Lisbon and Porto. Technology and innovation are shaping how businesses operate, with digital transformation and automation playing a key role in improving efficiency. At the same time, companies are investing in their workforce, offering career development opportunities and flexible work arrangements to attract and retain talent.

Alongside operational priorities, ESG has become a key focus for most companies. Diversity and inclusion, ethical business practices, and sustainability are shaping corporate strategies, reflecting a growing commitment to responsible and long-term business growth.

Portugal continues to offer an ideal mix of talent, innovation, and a business-friendly environment, positioning itself as a prime location for companies aiming to expand their service operations and build for the future.

# CASE STUDIES





## Building a Multicultural Capability Centre in Portugal

Amgen established its capability centre in Portugal in July 2021 as part of a strategic move to streamline operations and enhance its global services. The decision followed a detailed analysis of several European locations, including Warsaw and Budapest, with Portugal emerging as the optimal choice due to its strong education system, multilingual workforce, and time zone alignment with Amgen's headquarters in California. Daniel Campanha, the former centre lead who had been with the company since its inception, states, "Portugal stood out because of its talent pool and the multicultural environment. These elements matched our operational needs."

The centre initially focused on supporting commercial and functional operations in Europe, but its scope has since expanded to include Canada, Latin America, and the Middle East, as well as other global functions, further enhancing its value to the entire Amgen organisation. It now employs over 400 people from 40 nationalities, supporting areas such as data & analytics, finance, R&D, regulatory affairs, technology, and cybersecurity, among many others. "Portugal is an excellent location for high-value tasks, but there are challenges in bringing specialised talent from abroad due to bureaucratic hurdles," Daniel notes.

The centre operates with a flexible and collaborative working model, allowing recruitment from across Portugal while maintaining its base in Lisbon. Although this approach broadens the talent pool, infrastructure issues have created obstacles. "The airport in Lisbon has been a challenge for executives traveling from California, complicating visits," he explains.

Amgen's focus on cultivating an inclusive and meaningful workplace has been central to its retention strategy. The centre's turnover is significantly lower than the industry average. This outcome is supported by initiatives like flexible working arrangements, leadership training, and diverse employee engagement programs. "Our culture aligns with the values of the local workforce. Employees appreciate being treated fairly and having opportunities for growth," Daniel emphasises.

While Amgen anticipates expanding its workforce in Portugal within the next three years, certain challenges persist. Immigration processes remain a barrier to recruiting international talent outside EU, and the cost of living in Lisbon adds pressure to salary expectations. "The Portuguese Government could improve its approach to attracting investors by addressing these structural issues," Daniel observes.

Despite these challenges, the capability centre continues to expand its operations, integrating global functions and preparing to support emerging areas in the technology area. Amgen's presence in Portugal reflects the country's potential as a hub for high-value business services, provided that key policy adjustments are made to sustain its competitive advantage.



Established in Portugal: **2021**

Number of employees: **400**

Location: **Lisbon (flexible model allows nationwide recruitment)**

Type of centre: **Capability centre**

Functions: **Data & analytics, finance, R&D, regulatory affairs, technology, cybersecurity, medical and scientific communication, business partnering**

Main location decision factors: **Talent pool, strong education system, multilingual workforce, time zone alignment, multicultural environment**

## Mercedes-Benz .io

### A Key Hub for Digital Development

In 2017, Mercedes-Benz.io established a digital delivery hub in Portugal to support the company's global digital initiatives. Starting with an office in Lisbon (besides the two already established in Stuttgart and Berlin), the operation expanded to Braga five years later. The Portuguese centres now employ more than 460 experts, building the digital solutions for marketing, sales, and customer services across Mercedes-Benz's global network.

Portugal was chosen for its skilled workforce, particularly in the tech field, cultural proximity to Germany, and quality of life. According to Silvia Bechmann, who leads the operation globally, these factors provided a solid foundation for the centre's success: "The adaptability of the Portuguese workforce aligns well with the way we work and our objectives."

The hub's evolution has been marked by steady growth. Initially operating with a small team, the centre gained credibility through its consistent delivery of results. This led to rapid expansion, with over 200 new hires in 2022 alone. Today, it plays an integral role in supporting the company's digital strategy.

Recruitment was not without its challenges. While Portugal offered a strong talent base, certain specialised roles were hard to fill locally. To address this, the company extended its recruitment efforts to Portuguese-speaking countries, such as Brazil, and brought in professionals from other international markets. A structured recruitment process ensures that both technical and cultural fit are prioritised, helping to create a cohesive and highly qualified team.

Retaining talent has been equally important. Mercedes-Benz.io has invested in training and development, providing employees with access to global platforms like Udemy and opportunities to attend international conferences and trainings. This focus on growth, coupled with a flexible work model, has helped the company maintain a motivated and engaged workforce.

The centre has also embraced new technologies, with significant use of cloud platforms, data analytics, and artificial intelligence. AI tools have been adopted to streamline processes, and employees receive training to enhance their skills in this area. Silvia highlights the importance of staying ahead in a rapidly changing technological landscape: "We want everyone to feel equipped to take advantage of the tools and opportunities AI brings," she notes.

Looking forward, Mercedes-Benz.io aims to continue developing its capabilities while focusing on quality and long-term growth. While there are no immediate plans for new offices, the company continues to hire talent from across Portugal. The flexible work model, combined with well-equipped offices in Lisbon and Braga, supports this approach.

Portugal's business environment has also contributed to the hub's development. Strong educational institutions, support from local government, and an approachable network of partners have made it easier for the centre to navigate challenges and grow its operations. Silvia sees this as a key advantage: "Portugal offers a level of collaboration that helps us adapt and thrive."

Mercedes-Benz.io's journey in Portugal reflects the company's broader goals of building a strong, sustainable workforce and contributing meaningfully to its global operations.



Established in Portugal: **2017**  
 Number of employees: **466**  
 Locations: **Lisbon and Braga**  
 Type of centre: **Technological Hub**

Functions: **Development of digital solutions for marketing, sales, and customer services**

Main location decision factors:  
**Availability of skilled workforce, cultural proximity to Germany, supportive business environment**



## A Decade of Growth and Innovation in Portugal

H.B. Fuller's journey in Portugal began in 2012 with the consolidation of its European financial operations. The decision to establish a service centre in the country was influenced by a combination of factors, including an existing local presence and a strong pool of talent. The company's existing operations — a factory and office — helped facilitate a smoother transition. "Portugal offered the best balance between cost and quality," explains Maria Miguel Leitão, Vice President of Global Finance Services, emphasising that it was not just about finding the cheapest option but also about ensuring a high standard of operations.

Initially focused on financial and customer service functions, the centre grew rapidly in both scope and scale. In 2015, it marked a significant milestone by hosting its first global function, managing credit operations across multiple regions. This move served as a proof of concept that global functions can be managed effectively and efficiently outside headquarters. "It showed that our Portuguese team and operations could deliver at the highest level, which opened the door for more global opportunities," Maria Miguel notes.

Over time, the centre expanded its activities to include sourcing, IT, and inside sales, among other functions covering markets across Europe.

However, as the centre grew, so did the challenges. Competition for skilled talent increased, making recruitment and retention more demanding. Despite this, Maria Miguel remains optimistic: "Competition keeps us sharp — it pushes us to innovate and attract the best people." To tackle these challenges, the company invests heavily in corporate culture, training, internal mobility, and a range of employee benefits to ensure it remains an employer of choice.

Today, H.B. Fuller's Portuguese operations continue to thrive, supported by a reputation for quality and a commitment to innovation. While challenges such as demographic changes and tax burdens persist, the company sees Portugal as a vital part of its global strategy. "Our success here has built a reputation that speaks for itself. People know that Portugal delivers," Maria Miguel concludes.



Established in Portugal: **2012**  
 Number of employees: **317 (in the service centre)**  
 Locations: **Porto**  
 Type of centre: **Service centre**

Functions: **Financial operations, customer service, sourcing, IT, inside sales**

Main location decision factors: **Existing local presence, cost-quality balance, skilled talent pool, time zone compatibility, strong infrastructure**





## Insights into a French Management Insurance Centre's Journey in Portugal

In 2015, Génération established operations in Portugal to support its growing business in health and management insurance contracts. With the company doubling revenue every five to seven years, it became a challenge to scale efficiently. After evaluating multiple locations, Portugal stood out due to its alignment with EU compliance standards, political stability, and the availability of French-speaking talent.

While considering other French-speaking countries, Portugal's combination of factors made it the preferred choice. "Portugal provided the stability we needed as part of the EU. For a management insurance company like ours, compliance and regulatory predictability are critical," explains Richad Jiva Lila, Director of Génération Portugal. Additionally, Portugal's proximity to France — just two hours by flight — offered practical advantages.

Génération began with a small team of less than ten employees in Lisbon and has since grown to nearly 400 people, now spread between Lisbon and Leiria. A third location is also under consideration. As Richad puts it, "We're not here for cost savings; we're here to create a sustainable centre of excellence."

Recruitment has evolved over the years, with increasing competition in Lisbon making it necessary to explore other parts of Portugal. Leiria, for example, has provided a strong base for French-speaking talent with lower turnover rates. "Expanding beyond the capital gives us access to quality candidates while supporting our growth," says Richad.

To retain talent, Génération offers a balanced work environment that combines hybrid working options with a strong focus on well-being. Initiatives include social events and even on-site healthcare to create a sense of community among employees. "Our goal is to make working here more than a job — it's about fostering a sense of belonging."

Training and career development are also priorities. Employees undergo a comprehensive long-term training program, equipping them with specialised skills. Internal mobility is emphasised, offering opportunities for progression within the company across various roles and locations.

Despite the challenges of recruitment and rising wages, Génération is committed to its long-term presence in Portugal. Richad reflects, "We're aware that costs are going up, but we believe in the quality of talent here. We're not looking to relocate for cheaper options. For us, it's about sustainability and building something meaningful."

Portugal continues to offer Génération a strong foundation for its growth, combining access to talent with stability and opportunities for the future.



Established in Portugal: **2015**

Number of employees: **400**

Locations: **Lisbon and Leiria**

Type of centre: **Health and management insurance contract**

Functions: **Full lifecycle management of health insurance policies, including claims, reimbursements, and customer service**

Main location decision factors: **EU compliance, political stability, proximity to France, and availability of quality French-speaking talent**



PHILIP MORRIS  
INTERNATIONAL

## A Decade of Growth for Tabaqueira in Portugal

Tabaqueira, a Portuguese affiliate of Philip Morris International (PMI), has had a presence in Portugal for nearly a century. Building on this long-standing foundation, PMI established a Global Business Services centre in Lisbon in 2016, marking a new chapter in its operations. Over the years, the centre has grown significantly, employing over 400 professionals and playing a vital role in supporting the company's activities that impact more than one hundred markets globally.

Portugal was chosen over many other European countries due to the existing industrial site in the country that provides a solid foundation for business operations, while Portugal's highly skilled professionals, thriving economy, favourable business environment and robust academic institutions further reinforced the decision. Marcelo Nico, General Manager, highlights the alignment between Portugal's strengths and the company's vision: "Portugal offers a unique blend of talent, language capabilities, and access to world-class universities, making it an ideal location for high-value business services."

The Lisbon centre started with a focus on finance and operations but has since evolved into a varied hub incorporating today also IT, operations, customer care, and agronomy, fuelling PMI's commitment to innovation and technology excellence. The IT hub, in particular, has emerged as a critical asset, advancing capabilities in artificial intelligence and machine learning, among other cutting-edge technologies.

To continue to be successful, attracting and retaining talent is a top priority for Tabaqueira to excel. Measures to remain competitive in the search for top talent are critical. "Flexibility is key to ensuring that our employees remain engaged and connected," Marcelo notes.

Tabaqueira's commitment to fostering a positive employee experience extends beyond flexibility. Initiatives focused on employee engagement, diversity, and inclusion are core to its people strategy. Programs such as "Women in IT", in collaboration with Microsoft Portugal, are proof of the company's commitment to create an inclusive workplace while addressing talent gaps in specialised fields such as in STEMS.

As PMI heads into the future, the company aims to build on its achievements in Portugal. Plans include further expanding the centre's capabilities and increasing the export of added-value services through new tech centres aiming to support the company's transformation to smoke-free products. "Our goal is to contribute for accelerating the path to PMI transformation at national level while remaining competitive with other countries and continuing to attract strategic hubs to Portugal. To accomplish this challenge we need the support of all: employees, suppliers, contractors, and policy makers," Marcelo explains. PMI's growth trajectory highlights not just the company's trust in Portugal, but also its role in advancing the country's standing in the GBS landscape.



Established in Portugal: **2016**

Number of employees: **413**

Location: **Lisbon**

Type of centre: **Global Business Services**

Functions: **IT, finance, operations, customer care, agronomy**

Main location decision factors: **Industrial presence, skilled workforce, academic partnerships, language capabilities**

# AIRBUS

## Building a Future-Ready Business Hub in Portugal

Airbus made a significant move in 2021 by establishing its Global Business Services centre in Portugal. Operations officially began in July, with the centre starting modestly, but quickly expanding to approximately 800 employees by the end of 2023.

The growth is set to continue in 2025, having already over 1,000 employees already onboarded. The centre operates from Lisbon and Coimbra, covering a wide range of areas such as finance, procurement, human resources, IT, digital services, compliance, and data management.

The choice of Portugal was deliberate. Airbus sought a nearshore European location with an established GBS ecosystem, and Portugal ticked all the boxes. The country offered a well-educated talent pool with strong training across multiple domains, as well as a favourable business environment.

However, the rapid expansion brought its challenges, particularly in finding and retaining skilled talent, especially in the area of IT. Airbus has responded with a clear strategy: building its employer brand and creating partnerships with recent graduates through a trainee program designed to transition participants to full-time roles. Continuous learning is also central to its approach, with a mix of technical and interpersonal skills development offered through in-person and digital formats. Beyond professional development, Airbus emphasises creating a positive workplace culture, focusing on team dynamics and high-quality facilities.

Technology is at the heart of Airbus's operations in Portugal. The centre has already implemented Robotic Process Automation and is working to integrate Artificial Intelligence into its processes. Supporting its day-to-day operations are systems like SAP, Salesforce, and ServiceNow, which help drive efficiency and maintain the high standards expected by the broader organisation.

The centre's success so far reflects a combination of factors: a strong focus on recruiting the right talent, leadership with a clear vision, and a proactive effort to align with the company's global goals. The next few years promise further growth, particularly in areas critical to achieving seamless end-to-end processes such as source-to-pay and order-to-cash.

Airbus acknowledges that the sky ahead is not without obstacles. The competition for talent is growing. Despite this, Airbus sees tremendous potential for Portugal to position itself as a leader in next-generation digital GBS.

Sustainability also remains a top priority. Airbus is taking steps to reduce its carbon footprint, secure green building certifications, and ensure its operations are aligned with long-term environmental goals.

In just a few years, Airbus has built a strong foundation in Portugal, leveraging the country's advantages while navigating the complexities of rapid growth. It is a story of over 50 years with Portugal, based on ambition, adaptability, and a commitment to building a forward-looking operation.



Established in Portugal: **2021**

Number of employees: **1,100+**

Locations: **Lisbon and Coimbra**

Type of centre: **Global Business Services, multifunctional**

Functions: **Finance, procurement, human resources, IT, digital, compliance, data management**

Main location decision factors: **Nearshore European location, established GBS ecosystem, skilled and well-educated talent pool**

**FERRING**

PHARMACEUTICALS

## A Growing Hub for Global Support

The Centre of Excellence and shared services hub operated by Ferring Pharmaceuticals in Lisbon offers a revealing business case study of how a major player of the European pharmaceutical sector proceeded to carefully build from the ground upwards a global support function and leverage all strengths and skills available locally, whilst navigating and overcoming company-wide challenges.

Ferring established its Centre of Excellence in Lisbon in 2020 as part of its strategy to centralise global support. Initially focused on IT operations, the centre quickly expanded to include functions such as finance, human resources, procurement, and marketing. With nearly 300 employees today, it supports Ferring's operations across Europe and Brazil.

The decision to locate the centre in Lisbon followed a thorough evaluation of multiple other potential sites across Europe, including Barcelona, Warsaw, and Prague. Cristiano Ferreira, the centre's leader, explains: "Lisbon stood out thanks to its strong talent pool and good infrastructure, as well as its proximity to our headquarters in Switzerland." These factors, along with the cultural alignment and access to skilled professionals, shaped the decision.

The establishment of the centre coincided with the COVID-19 pandemic and the many business challenges that came with it. The first employees joined remotely, and operations were conducted online. Cristiano remembers: "In the beginning, Ferring had to send all work equipment to our employees so that they could work from home remotely. It was not until the end of 2021 that we were finally able to gather everyone in person for the very first time and to welcome all our collaborators into the Ferring culture."

By the end of its first year, the centre had grown to 100 employees and plans to reach 300 soon. Ferring's Centre of Excellence in Lisbon plays an important role in finance operations by bringing teams closer together to standardise processes, improve collaboration to drive efficiency and better support the business. This setup nurtures innovation, like a lab, and encourages knowledge-sharing and the testing of new ideas before they are scaled up across the company globally, in a culture of permanent improvement.

Recruitment initially relied on external consultants to support Ferring's needs to meet the demands of rapid hiring and to identify competitive salary benchmarks. As is often the case in new organisations, building awareness about Ferring's brand and mission was another challenge. Cristiano explains further "Over time, word of mouth has helped us build our reputation as an employer in Portugal." The centre's workforce is today predominantly Portuguese, but it has also attracted professionals from other geographies, namely Brazil and Eastern Europe.

Central to Ferring's approach is the aspiration towards a good retention of talented people. It reflects the company's efforts to bring Ferring values, culture, and commitments to the Centre of Excellence in Lisbon, but it speaks volumes about the employees too, who appear to adhere and embrace Ferring's healthcare mission. Ferring's value proposition for its employees is predicated on modern workplace policies and benefits focused on their well-being. As a company with a longstanding focus on helping people build families, Ferring takes pride in offering dedicated parental leave programs to employees about to become mothers or fathers. "This program reflects our values and commitment to build families and help people to live better lives," adds Cristiano. The company also prioritises career development through training and learning opportunities, fostering both professional and personal growth.

In its day-to-day operations, the centre uses the very latest technologies to support employee experience and enhance efficiency across the company. Automation and artificial intelligence are areas actively explored by Ferring, with plans to expand their use to complement existing systems. Consolidating multiple ERP platforms into a single system has also been a major focus, thereby improving consistency and streamlining processes. Cristiano confirms: "After this transition, we will be more capable of supporting the business and enabling a better and faster decision-making process".

Looking ahead, Ferring's Centre of Excellence in Lisbon aims to continue expanding its scope and to consolidate existing functions. Cristiano notes that the collaboration with Brazil demonstrates the potential to extend support beyond Europe. He notes: "The experience with Brazil has been extremely positive and shows that we can adapt to new regions effectively. This could guide future growth."



Established in Portugal: **2020**

Number of employees: **Approximately 300 (2024)**

Location: **Lisbon**

Type of centre: **Digital solutions and shared services**

Functions: **IT, software development, FP&A, human resources, procurement, paralegal, ESG, and others**

Main location decision factors: **Talent availability, cultural alignment, time zone and connectivity, proximity to headquarters**



## Building Digital Excellence in Portugal

Volkswagen Digital Solutions (VWDS) officially began operations in Lisbon in 2019, bringing together three existing tech units into a consolidated hub for IT and digital innovation. Over time, VWDS expanded to a second location in Porto, launched in 2023, reflecting its sustainable and steady growth strategy. Today, the company employs over 700 professionals in Portugal.

The decision to establish operations in Portugal was driven by access to high-quality talent and a strong cultural alignment with Germany, Volkswagen's headquarters. "The quality of talent here is why we came, and it is why we stayed," said Albertina Soares, the Porto Project Lead at VWDS. She also highlighted the proficiency in English and the flexibility of Portuguese professionals as key factors in ensuring smooth collaboration between teams in Portugal and Germany.

Initially, VWDS focused on IT projects, partnering with Volkswagen brands such as Audi, but its scope quickly expanded. The centre now hosts over 50 active projects, encompassing areas like software development, embedded AI, and data engineering. Albertina shares: "We started with one AI specialist, and now we have a team of almost ten. The demand for AI and data solutions continues to grow."

Recruitment in Portugal has been competitive, especially for specialised tech profiles, as more companies enter the local market. To attract and retain talent, VWDS emphasises its company culture and wellbeing initiatives. From webinars to workshops, as well as projects related to mental health, physical activity, and healthy eating, among others, the VWDS Wellbeing Workshop also offers on-site amenities such as massage sessions and nurse appointments. "We aim to create a workplace where employees feel valued and supported," Albertina explains.

Training and development are also integral to VWDS's strategy. Employees benefit from technical training in areas like AWS and ServiceNow, as well as soft skills programs such as negotiation and feedback techniques. For junior hires, VWDS runs an academy that combines onboarding with mentoring and specialised training, ensuring a smooth transition into the company.

The diverse workforce at VWDS, representing 37 nationalities, also contributes to its success. Albertina notes: "Diversity brings different perspectives and enriches the solutions we develop. It's essential for a company like ours that serves a global market."

Despite its success, challenges remain. Competition for tech talent and the limited availability of specialised profiles are ongoing concerns. However, the company continues to grow sustainably, prioritising quality and alignment with its cultural and operational standards.

Looking ahead, VWDS plans to expand its projects and workforce while maintaining its focus on innovation and employee wellbeing. As Albertina summarises, "We aim to grow, but in a way that ensures every new team member brings value and feels like they belong."



Established in Portugal: **2019**

Number of employees: **700+**

Locations: **Lisbon and Porto**

Type of centre: **Digital innovation and shared services hub**

Functions: **IT, software development, AI, data engineering, and support for global brands**

Main location decision factors: **Talent quality, cultural alignment with Germany, and English proficiency**





## About Aicep

Aicep Portugal Global — Trade & Investment Agency is a government business entity focused on encouraging the best foreign companies to invest in Portugal, as a one-stop-shop agency.

It provides support services to foreign companies, counselling and coordinating contacts with Portuguese entities involved in investment processes. AICEP works as a government business entity, flexible, with streamlined free of charge services, offering a dynamic approach focused on the client/investor and allowing direct negotiation with companies, through a tailored approach to their requirements.

AICEP is a single point of contact to foreign investors in all phases of the decision process:

- Enquiry-handling phase — provide comprehensive accurate information, data and benchmark reports
- Site location — provide different site proposals according to project specifications and help partnerships with local entities
- Fact-finding visits — organise site visits to meet local authorities, recruitment firms, office space providers, universities, among others
- After care — key account manager to provide assistance on a regular basis

Co-financed by:



Cofinanciado pela  
União Europeia

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