

8 GOOD ACCESSIBILITIES

- IP4 (the large high road from Porto to Bragança) completely changed the access time by road to the hTM region. Mirandela city is now around 1h30m from Porto and Bragança city around 2h to 2h15m from Porto, by car.
- IP4 is na Express road that crosses the Marão mountains halfway between Porto and Bragança. But it is a road with a good safety record - and an unique beautiful view of the region.
- The new IP2 road is starting to benefit some areas, specially Macedo de Cavaleiros city, where the crossing of IP4 and IP2 is located.
- The last step of IP3 road (under construction) will cross IP4 in Mirandela city
- Bragança has two daily flights to and from Lisbon. The scheduled and regular flights Bragança - Vila Real - Lisbon lasts around one hour and allows a two way trip between Lisbon and Bragança in the same working day.
- The Bragança- Lisbon flights are not only short, but also cheap. A two way fare is around half the price of a regular Porto- Lisbon two-way fare. By air the travelling between Bragança and Lisbon is also cheaper and shorter than by car.
- Bragança aerodrome has now a good landing site with 1200m long, it is being extended to 1700 m (which will allow future flights to Madrid) and is certified for night flights. Mirandela also has a aerodrome, certified for day flights.

○ A new TGV station of the Spanish high speed train network will soon be built in Pueblo de Sanabria, just 30 kms from Bragança, across the border. This will allow a direct rail connection to Madrid in less than 1h30m.

A REGION WITH A GOOD AND IMPROVING QUALITY OF LIFE

- 9** The beauty of the natural environment of the hTM region and the big changes of the local cities have created during the last two decades attractive conditions for people looking for a high standard of life quality far from the big urban concentrations.
- Health and education infrastructures improved very much, specially during the last decade, and are now of well recognised capability.
 - Large hypermarkets chains have stores in the triangle Bragança - Macedo de Cavaleiros - Mirandela. Availability of consumer goods is equivalent to Porto or Lisbon.
 - The cities of hTM are small cities with large green areas, flowered gardens and streets, good sport equipments and cultural centres.
 - Access to the TV cable network is available by satellite in all the region
 - Cultural life, partially driven by the growing high students population, has been more and more dynamic during last years

10 REGIONAL BÓNUS TO INCENTIVES FOR INVESTMENT AND THE TRAINING IN HTM

- POE (the operational program for the economic development) has attractive incentives to support new investments and companies based in the region, including the necessary training and education of the qualified manpower
- Investments in hTM region has an additional bonus in the POE framework for investments in peripheral regions
- Investments and activities related to information and communications technologies are well valued for incentives in the POE program

10 +1 and you can also profit from... A STRONG LOCAL COMMITMENT FROM THE LOCAL LEADERSHIPS

Local councils have a reputation of strong commitment and support to new projects:

- Local councils are committed to support new investments in the region through packages of local incentives
- Special bonus in the local taxes (depending on the project evaluation)
- Support for the installation of needed infrastructures and access facilities, if needed

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10 + 1 REASONS TO INSTALL ITC OPERATIONS IN HIGH TRÁS-OS-MONTES

The attractiveness of a region for operators of ITC (information and communications technologies) operators, like software production units or call centres / contact centres is usually evaluated by several criteria:

- Availability of qualified manpower
- Average cost of the available manpower
- Degree of rivalry between the installed base of existing operator in the area
- Multilingual capabilities of available agents
- Local spelling (for call centers)
- Availability of local facilities for training and education
- Availability of adequate building premises
- Competitive pricing of building rentals or acquisition cost
- Local infrastructure for advanced digital communications and the cost of traffic
- General accessibilities to the region from the central urban international capitals
- The degree of local "life quality"
- Available local and regional, plus national, incentives for investment
- Degree of support of local authorities and their committed leadership
- The support of the local communities

The three cities of the triangle Bragança - Macedo de Cavaleiros - Mirandela (what we call a local triangle for the future) can now present an attractive set of answers to those criteria. A new generation of local willingness and new infrastructures, including a new framework for the development of the region, has changed dramatically the realities of life in High Tras os Montes (hTM, Alto Tras os Montes, in Portuguese). The region is now mature and attractive for advanced operations of information and communications technologies.

1 THERE IS AN AVAILABLE AND QUALIFIED MANPOWER

○ hTM has an important stock of young people with full secondary education, but unemployed (or subemployed) and looking for local opportunities and challenges. Every year around one thousand young people finish their secondary education (12 years) but do not continue their studies.

○ HTM has now an impressive high education sector, that has changed very much the region during the last decade. More than nine thousand students are enrolled in public and private high education institutions in based in hTM, with an emphasis in technology and engineering degrees. Ninety per cent of that offer is concentrated in the triangle of the three cities Bragança - Macedo de Cavaleiros - Mirandela.

○ The number of students enrolled in computer related degrees is the third larger concentration in Northern Portugal, after the metropolitan areas of Porto and Braga.

○ Seventeen per cent of the high education in hTM are enrolled in engineering degrees, against an average of eleven per cent in Northern Portugal.

○ In 2002 around 350 students have enrolled in courses like management information systems, computer engineering, electrical and electronics engineering and telecommunications. The actual output of the system is much higher than the existing local demand. Due to an increasing enrolment during last years, the trend will prevail and will be stronger during the next years.

○ 14% of the resident population of Bragança has an high education degree, a value higher than the Northern Portugal average (9%) or the national Portuguese average (11%).

○ Unemployment rate in hTM shows similar values to Northern Portugal ones, but the activity rate (36%) is much lower than in Northern Portugal (46%) or Portugal (45%), which means that an important part of the population is out of the job market. Although an older rural population without qualifications explains an important part of the difference, part of it includes young people (specially women) with strong potential for new job opportunities.

2 THE LOCAL COST OF MANPOWER IS 25% TO 50% LESS THAN IN PORTO OR LISBON

○ A full time call center agent has a typical cost of 10 to 15 thousand euros per year (before social taxes) in Lisbon or even Porto. Local actual salaries and actual demand suggest that the equivalent local cost can be from 6 to 10 thousand euros per year (before social taxes, that are not region dependent).

○ These values compare with typical rates of 20 to 25 thousand euros per year in United Kingdom

3 NO LOCAL RIVALRY: JOB STABILITY

○ The high turnover and high attrition rate typical of urban call centre operations in a market with growing demand are not of course expected in a region like hTM

○ The recruitment problems of call centres are well known, specially the capacity

to retain experienced operators on specialized functions or services. Peripheral regions like hTM offer an exceptional opportunity for stable operations.

○ Stable operations is also a contribution for higher productivity

○ The European experience of ITC in rural areas and peripheral regions is clear and shows the benefits of low job rotation and long term commitment by local agents (in a full time or part time basis)

4 MULTILINGUAL CAPABILITIES AND FAVOURABLE SPELLING

○ The multilingual capabilities of the Portuguese people are well recognized. Portuguese people speaking English, or French, or Spanish, often reach a level of expertise without recognisable local or national accent.

○ Portuguese speaking in hTM is a soft and pleasant one, something important in phone based CRM and call centre operations

○ Because hTM is a border region, a lot of people is well acquainted with Spanish language and for some of them it is a second natural language, or at least they show an easy way to master it.

○ hTM has been a strong base for Portuguese emigration to France and Germany during the 60's and 70's, part of them having returned, part not. But during the last decades some second generation migrants returned, and they speak French or German has their natural languages, because they were born and educated there. Teams of people fluent in these languages can be expected to be available in hTM.

5 FACILITIES FOR LOCAL TRAINING AND EDUCATION

○ Local universities and polytechnic institutes have all the required human resources and technology competences needed to support the training and agents for local operations. Professional and technical schools are also available to contribute to the training efforts.

○ Two local Cisco Academies are operating in hTM and offering Cisco certified courses on telecommunications and digital networks. One is in Bragança, based in the local ISLA (a private high school, www.isla.pt/braganca) and another one in Mirandela, based on the local ESTGM (www.ipb.pt/estgm, a technology and management high school, part of the IPB - the Polytechnic of Bragança, www.ipb.pt)

○ Cisco (Portugal) is willing to support the training of contact centres agents using their specific contents for that

○ The IEFP, the national institute for professional training (www.iefp.pt) has a large Training Center operating in Bragança, with large experience in training courses for professional activities

○ Both Bragança and Mirandela have Professional Schools with successful experience

6 A LOCAL OFFER OF PROPERTIES WITH HIGH QUALITY AND GOOD PRICES

○ The available offer of office space and home buildings is of good quality, with brand new buildings, but much more affordable than in the large urban areas of littoral cities

○ Properties costs and leasing rents are typically 20% to 40% less expensive than in Lisbon and Porto.

○ In all the three cities of the triangle (Bragança, Macedo de Cavaleiros and Mirandela) there are open spaces available for sale or renting, from small and middle areas to even large areas, usually close to the city centres and to the associated infrastructures.

7 A FULL DIGITAL TELECOM NETWORK

○ The fixed phone network is fully digital and all the operators have services offer in the region

○ All the cities and a lot of villages are connected by an extensive network of optical fiber

○ ISDN (RDIS) is available in all the region and broadband connections (ADSL) are fully available in all the cities of the "triangle"

○ Bragança has been operating from 2000 of a large wireless network covering all the public services (including schools) and buildings in the urban area of the city. This has been the first wireless network to be installed in Portugal. The project has been successfully designed, implemented and operated by the local Polytechnic Institute.