

ORACLE®

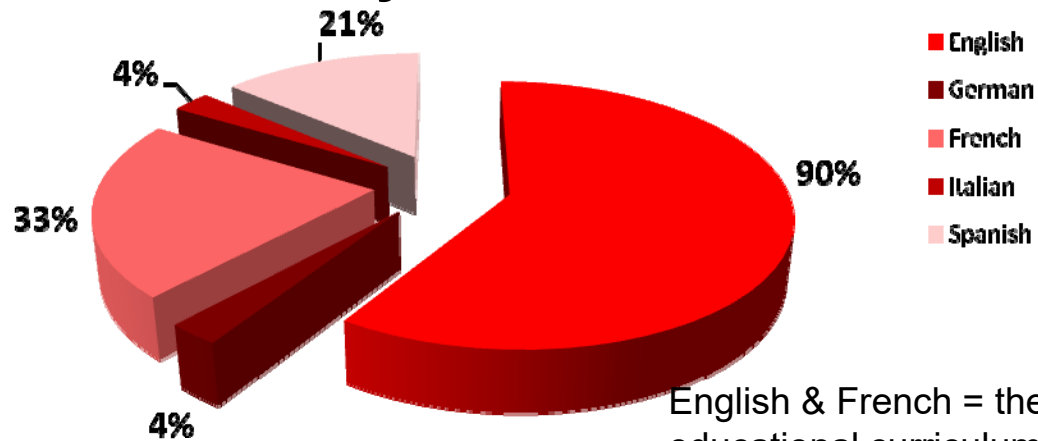


Oracle Romania

Sorin Mindrutescu

Country Leader & CEE Cloud Director

Education dynamics in Romania



English & French = the widest spread languages in the compulsory educational curriculum for high school students

- Almost 100 universities (24 with studies in foreign languages English, French, German)
- 1 university for 100,000 inhabitants
- Over 300,000 graduates every year
- 50,000 economic sciences graduates every year
- 10,000 IT professionals every year; 30,000 with engineering

Romania – IT&C Talent Map

Cluj. One of the hot spots in Romania for IT and BPO services.

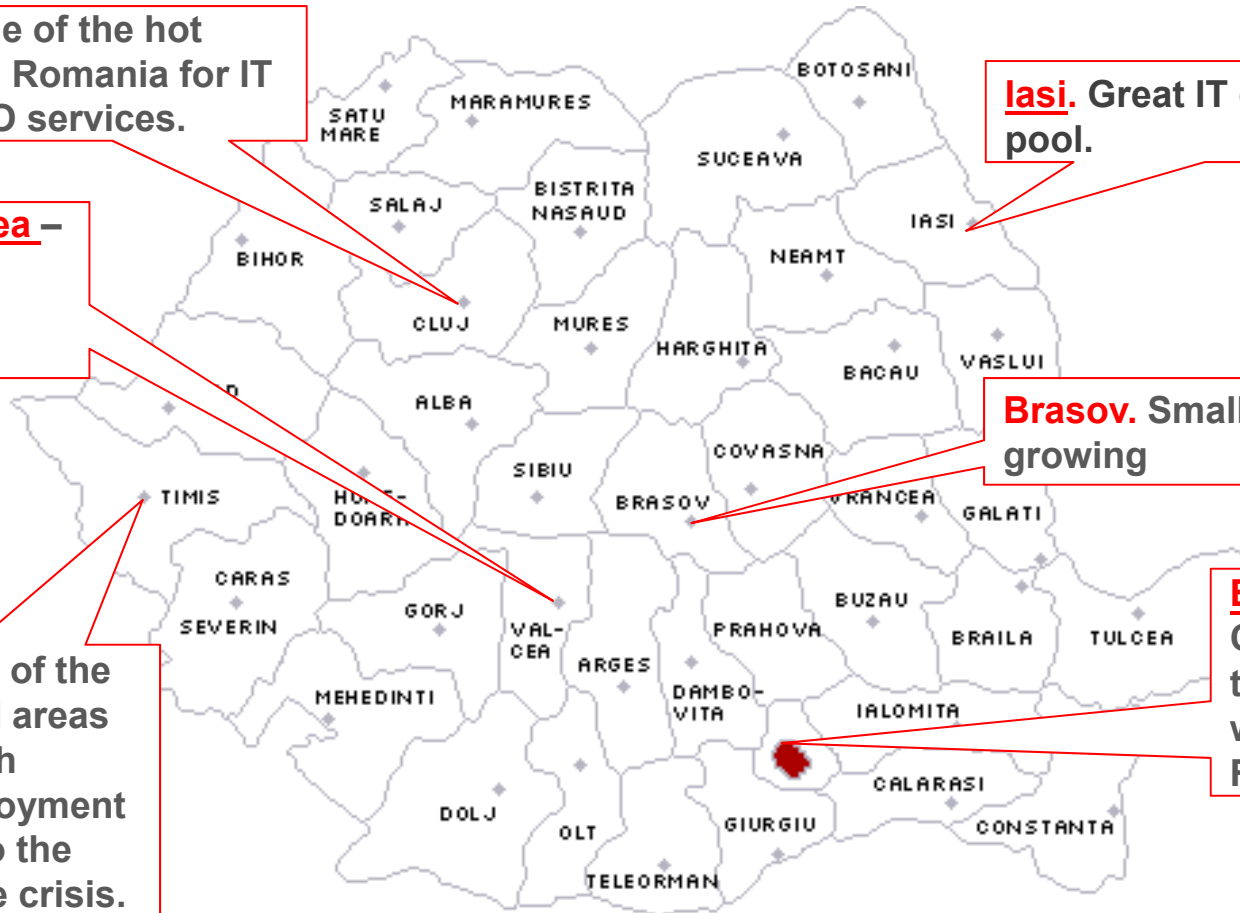
Ramnicu Valcea –
Small IT pool.
Many German investments.

Timisoara. One of the best developed areas in Romania with official unemployment figures close to the ones before the crisis.

Iasi. Great IT graduate pool.

Brasov. Small IT hub, but growing

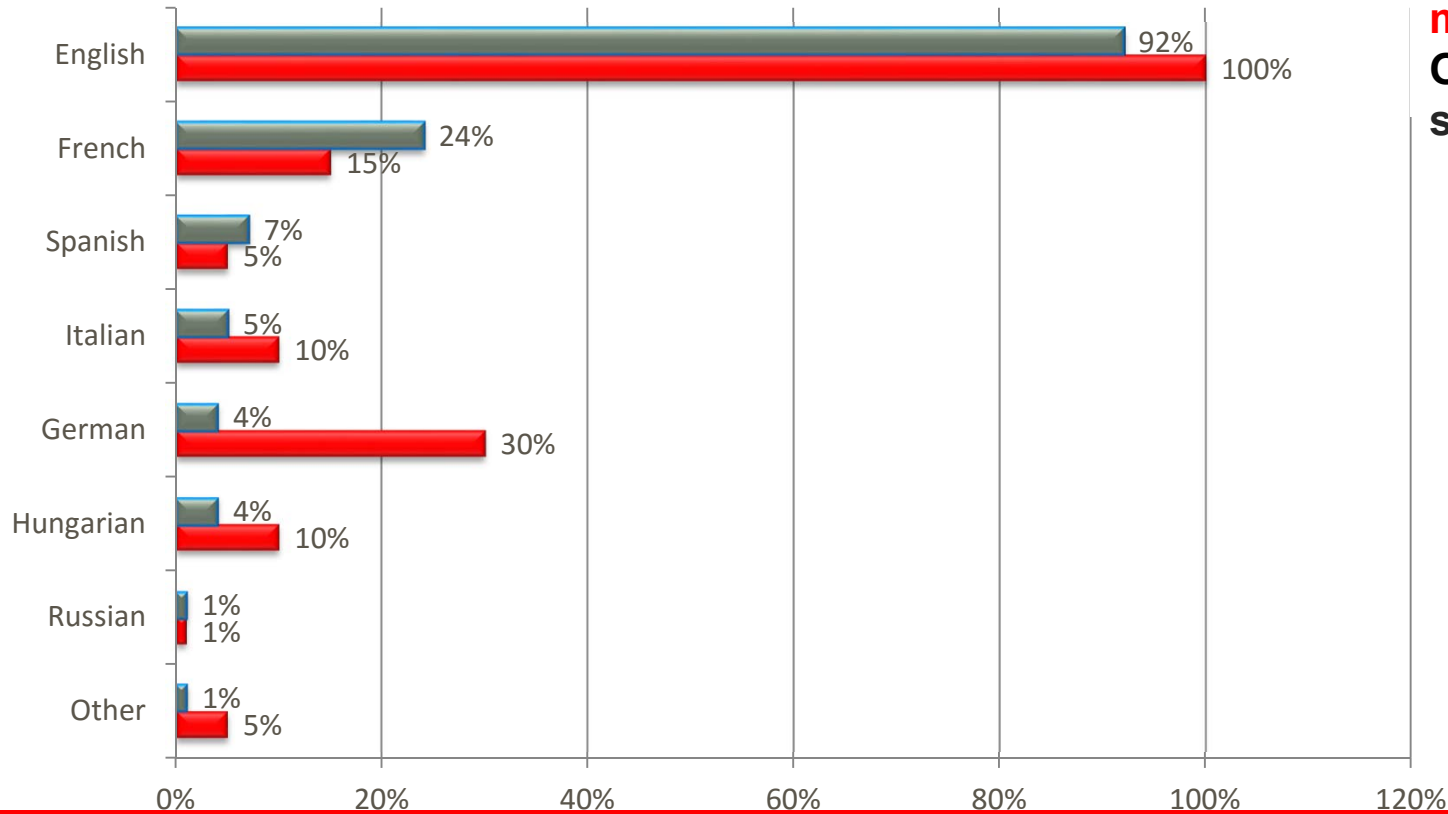
Bucharest.
Concentrates more than half of the IT workforce in Romania.



Market Scan- Foreign Language Skills

German is one of the most in-demand skills in the **Romanian market**.

Only 1 in 25 IT people speak German.



Existing skills
Required skills



What made Romania interesting

- EU accession in January 2007 geo-economic development
- attractive “new economy”
- steady economic development
- well-educated workforce
- good telecommunication infrastructure
- good timezone alignment with major EMEA countries

IT&C SECTOR

- Fast growth of the Romanian IT&C sector
- Highly prepared specialists
- Telecommunications (over 1800 companies) and IT services (over 5000 companies) market – strongly developed
- Strong investments in call centre area in the last 10 years



Oracle Romania - Landmarks

- Oracle Corporation started a representative office in Romania in **1995**, due to the increasing number of Oracle customers, users, and also to the development of complex projects based on Oracle solutions which required local expertise.
- Oracle was one of the first large multinational software company to open an office in Bucharest.
- February 2004 - official launch of the Oracle Services and Technology **Centers** in Romania.

IT Market Overview [Around 1,500 job openings in IT field at any given time]

The image features a map of Romania with several callout boxes pointing to various regions, each containing logos of IT companies. The callout boxes are:

- Top Left:** ebs (an NTT DATA Company), betfair, IQUEST, hp, SU 15 YEARS (SOFTVISION), and evoline (It's possible!).
- Top Right:** ORACLE, amazon, Continental, Capgemini (CONSULTING, TECHNOLOGY, OUTSOURCING), and MIND (Billing & Customer Care).
- Bottom Left:** Alcatel-Lucent, océ (A CANON COMPANY), ATOSS, and ACI payment systems.
- Bottom Center:** SIEMENS and a 'ROUTE 66' shield.
- Bottom Right:** ORACLE, DELL, Microsoft, intel, IBM, SAP, UBISOFT, EA, Adobe, endava, and freescale.

Shared Services Market in Romania

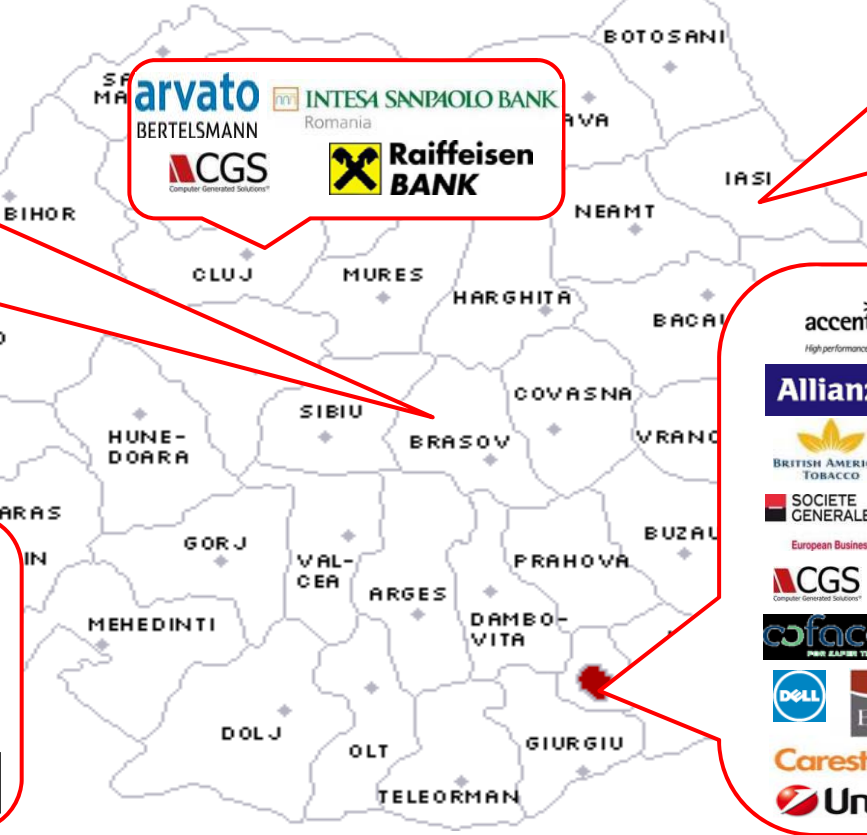
BOMBARDIER
the evolution of mobility
EMERSON
EVALUERVE
YOUR GLOBAL KNOWLEDGE PARTNER
Tenaris
EXL
business process solutions
GENPACT
Office DEPOT
Leading Care of Business
AS COLLECTION
no space for us
Steelcase
SYKES
Real People. Real Solutions.

arvato
BERTELSMANN
CGS
Computer Generated Solutions
INTESA SANPAOLO BANK
Romania
Raiffeisen BANK

amazon
Capgemini
CONSULTING TECHNOLOGY AUTOMATING
EOS
GfK
ORACLE
LEO Finance
xerox
firecredit
consulting & debt management
SCC
UniCredit Ţiriac Bank

Alcatel-Lucent
Atos
BOSCH
[buw]
Microsoft
HELLA
WIPRO
Applying Thought
FLEXTRONICS

accenture
High performance. Delivered.
Allianz
BRITISH AMERICAN TOBACCO
SOCIETE GENERALE
European Business Services
CGS
Computer Generated Solutions
coface
FOR 25 YEARS
DELL
EOS
Carestream
GENPACT
ORACLE
Honeywell
P&G
HUAWEI
Power. Here you need us.
PAREXEL
hp
Schneider Electric
stefanini
POWERING YOUR BUSINESS
IBM
TEMENOS
The Bridge Software Group
Microsoft
xerox
OMV
WIPRO
Applying Thought
WNS
Extending Your Enterprise
UniCredit Ţiriac Bank



Oracle in Romania – Employer of Choice

1	Oracle
2	Google
3	Microsoft
4	IBM
5	OMV Petrom
6	Continental
7	Vodafone
8	Renault Romania
9	HP (Hewlett-Packard)
10	Coca-Cola HBC
11	Orange
12	P&G
13	BCR
14	BRD
15	EY Romania
16	Accenture
17	Deloitte
18	KPMG
19	Adobe
20	Honeywell

Oracle ranking:

- 2010 – 3rd place
- 2011 – 1st place
- 2012 – 2nd place
- 2013 – 1st place
- 2014 – 1st place
- 2015 – 1st place

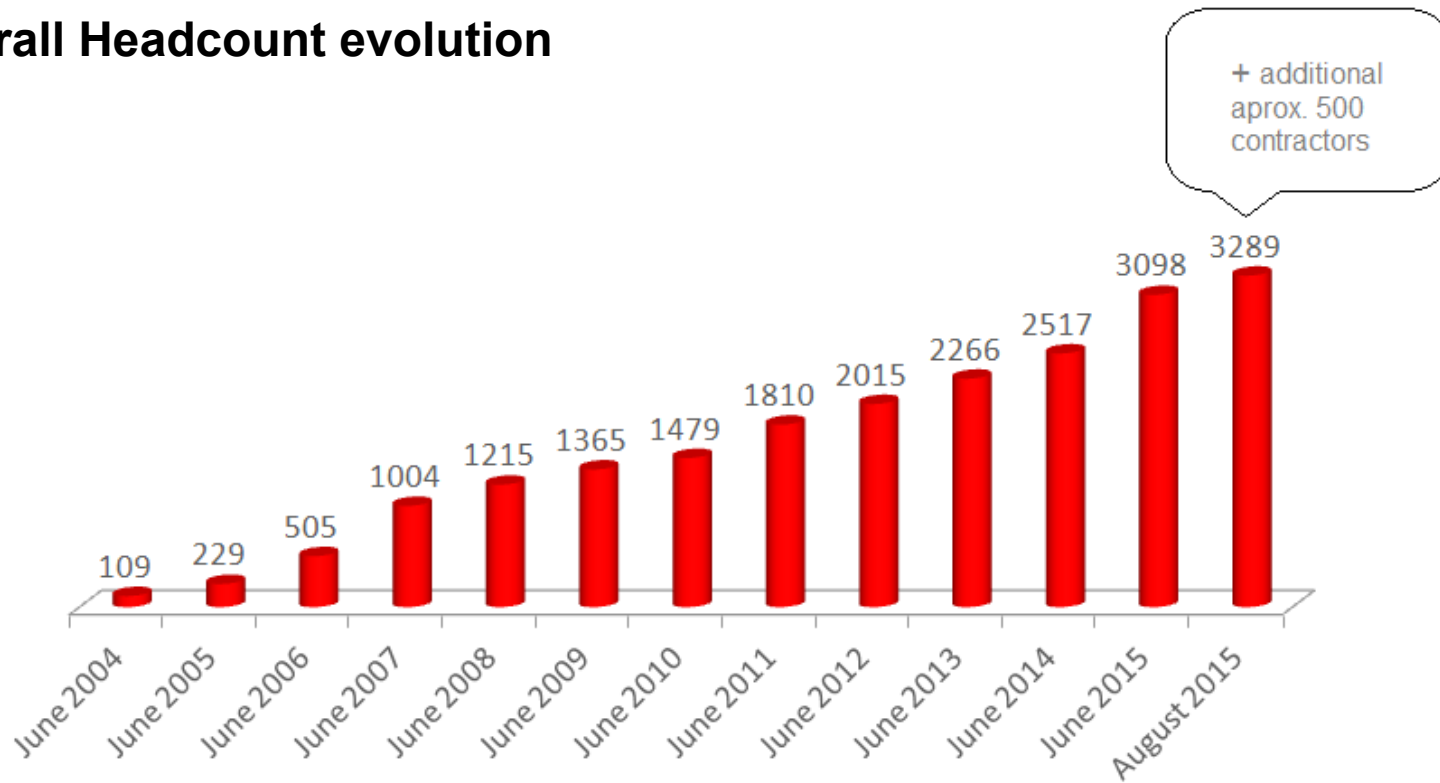
Q: Which are the top 3 employers you would like to work for?

Source: Catalyst Solutions

ORACLE

Oracle Romania

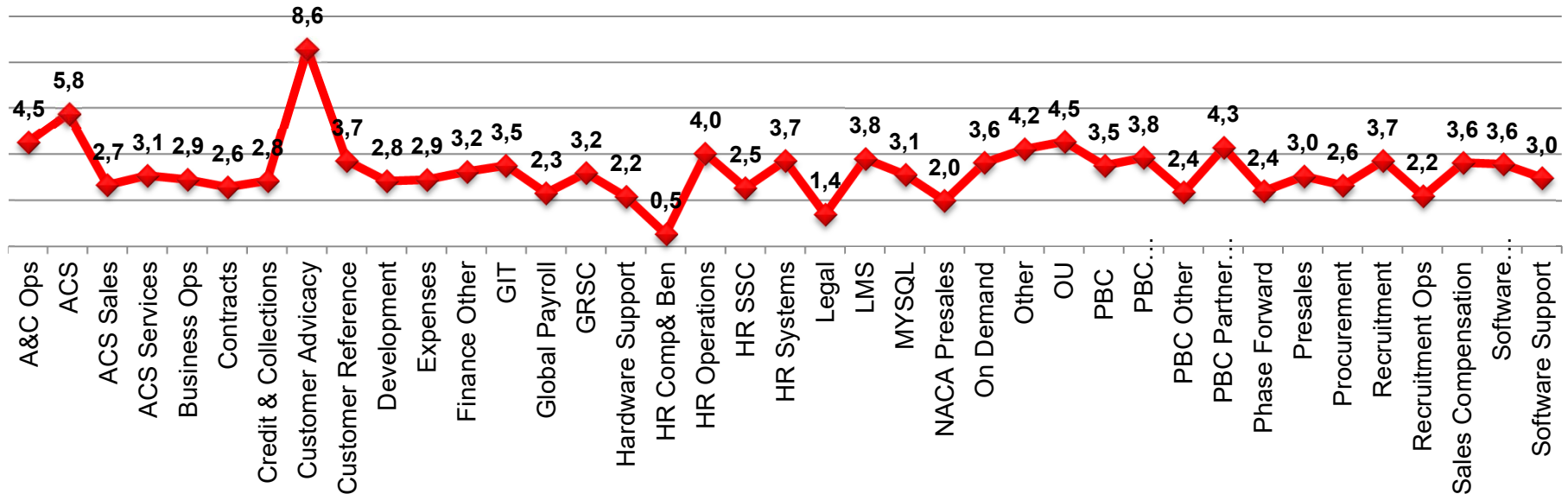
Overall Headcount evolution



Shared Services Centers

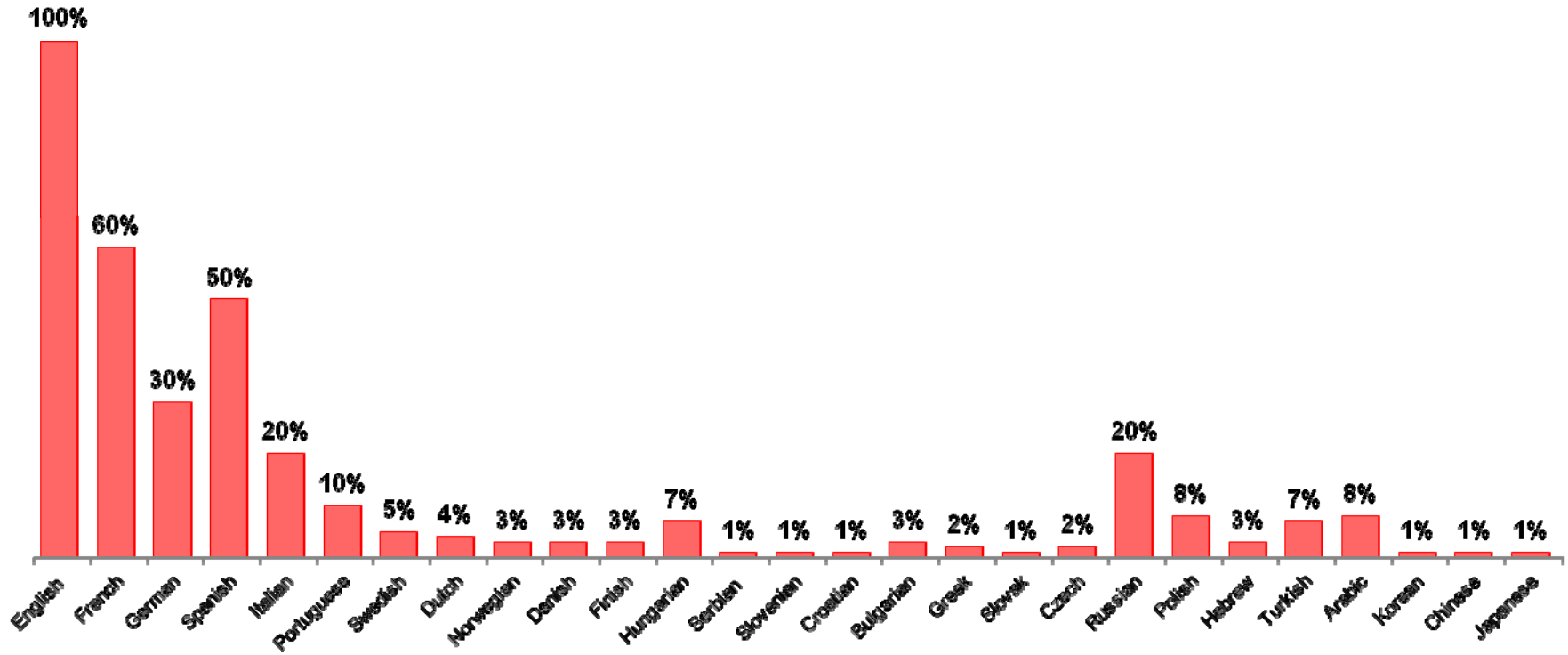
Overall average tenure (years)

Average age: 31





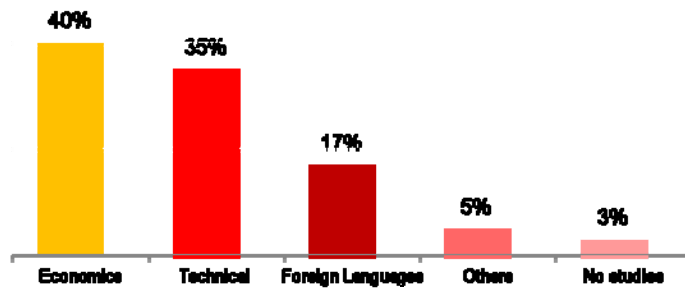
Language Skills



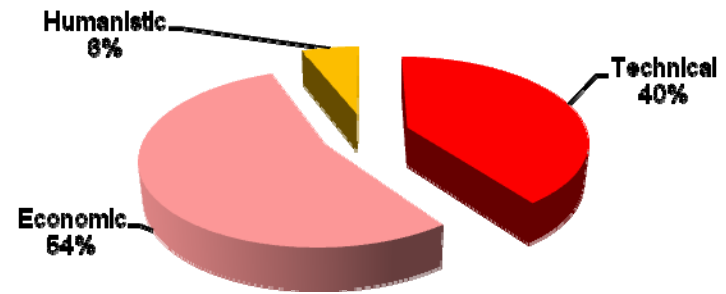
Recruitment Stats

Candidates Profiles Analysis

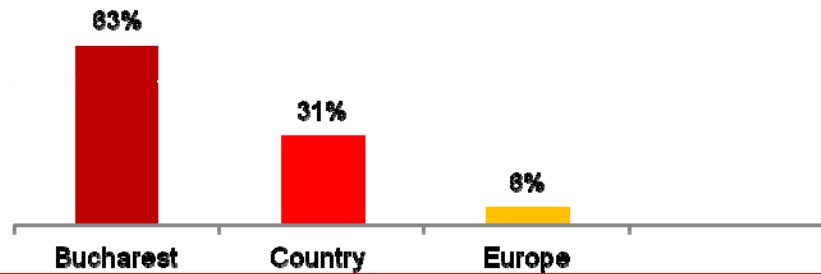
CVs distribution per educational background



Employees profile distribution per activity types in Oracle Romania

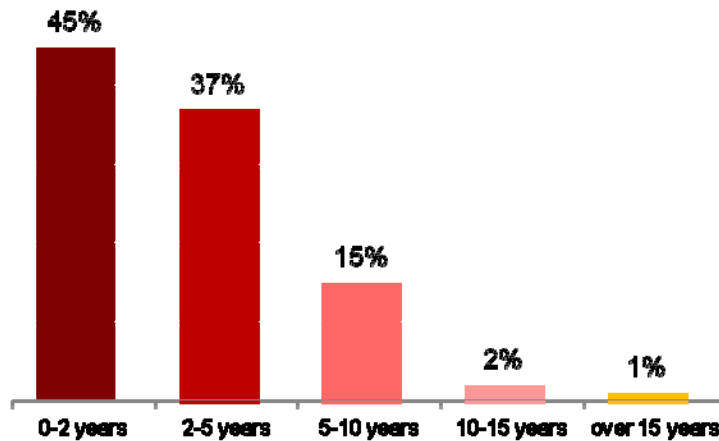


CVs regional distribution

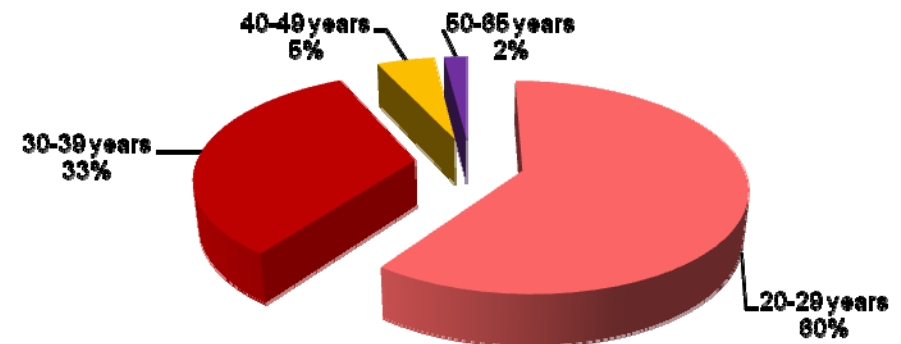


Analysis on age and experience

CVs distribution in Oracle RO based on professional experience



Oracle employees age distribution





ORACLE®