Navigating the New Working Era:

Romania at the Crossroads of Innovation and Strategic Growth in 2025



Insights from the Annual Business Services Sector Report 2025

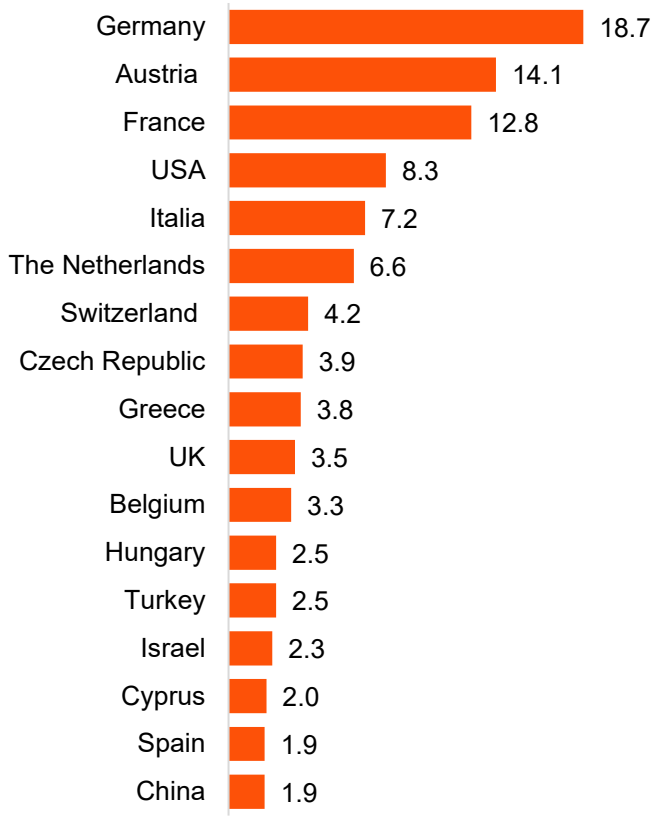
13 November 2025

Romania market snapshot

Romania is facing a test of economic maturity

- **GDP growth:** Projected at **0.8%** in 2025, with expectations to rise to 2% in 2026
- **Inflation rate** is projected to reach **8.8%** at the end of 2025, compared to the previous forecast of 4.6%.
- **Unemployment**: Stable at around **5.3%,** with a slight downward trend
- **Government deficit**: Expected to decline, from 9.3% of GDP in 2024 to **7.5%** in 2025
- **Public debt**: At ~**54.8%** of GDP (within EU's 60% limit)

FDI stock by country of origin*
(BLN EUR, 2024)*



7th in population size among the 27 EU member states

12th in the EU by total nominal gross domestic product (GDP) and **44th** globally by nominal GDP

48th in the Global Innovation Index

*Source: INSSE, Eurostat, Invest Romania 2023, PwC analysis

Crossroads of Opportunities and Challenges

Opportunities

EU Funding & Green Transition

- Billions in EU grants available for infrastructure, digitalization, and sustainability
- Strong incentives for renewable energy, smart cities, and green tech

Digital Economy Growth

- Romania is a regional tech hub with a large pool of IT talent.
- High mobile and internet penetration supports e-commerce and fintech expansion

Strategic Location

- Romania’s Schengen accession (2024) boosts trade and logistics.
- Gateway to Eastern Europe, Balkans, and Black Sea region.
- Second largest Shared Delivery Centre hub in CEE, after Poland.

Challenges

- Romanian declining economic growth and volatility
- Record budget deficit, tax increases
- Labour market mismatch: More difficult to find the employees with the proper skills
- Structural competitiveness issues in the context of EU's economic weakness: Germany’s shrinking economy negatively affects Romania



Source: PwC analysis

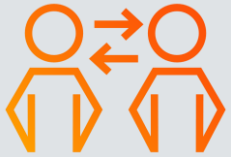
High performance GBS organisations lead the way through a set of established capabilities and next gen best practices

World-class GBS – What great looks like



GBS service delivery framework

- **Multi-tiered** model balancing global scale and efficiency with proximity to the business, choosing the right **locations.**
- **Different consolidation levels** by function and line of business.
- Increasing penetration of **expertise work.**
- **Standard service catalogues** and service levels set based on what customers value.
- Simple **allocation model.**



People & Talent

- Defining **new talent models** to manage hybrid workforce.
- Established **career paths** across functions in GBS and between GBS and BU/corporate functions to attract talent.
- Integrating the GBS into the company's **culture, driving service excellence** and continuous improvement.
- Major **investment** in **talent management** and **training.**



Technology & Innovation

- **End-to-end process standardization** leveraging **process mining** techniques.
- **Deploying RPA, ML, and AI** to digitize manual work and transform the way of working.
- **Cloud** solutions as the dominant platforms.
- GBS delivers **enterprise-wide analytics** to serve the business.

Source: PwC analysis and GBS point of view

GBSs in 2025 are evolving into strategic powerhouses, leveraging global expansion, process mastery, & GenAI

Four main trends will reshape GBS capabilities and value delivery

01 Rapid GBS growth

Enhanced value driving rapid expansion

- **Expanding scope** integrates GBS into new functions: Finance, HR, IT, Supply Chain, product development…
- GBS shifts from cost-center to **strategic partner**, supporting enterprise-wide growth initiatives
- **Insourcing** accelerates GBS growth, providing better control over processes and cost efficiency

02 Global footprint expansion

Diversifying GBS locations for cost & talent optimization

- GBS expands to **new regions**, balancing cost savings with skilled talent access
- Regional diversification enables **faster, localized responses** to market and regulatory needs

03 End-to-end excellence

Mature GBS taking full ownership of processes

- GBS evolves from transactional roles to managing **end-to-end value**-generating processes
- GBS consolidates and optimizes processes, driving **strategic capabilities and efficiencies**

04 GenAI development leader

GBS at the forefront of scaling GenAI solutions

- GBS leads the transition from **GenAI pilots to full-scale production**
- GenAI enhances decision-making, automates workflows, and extracts insights from data
- In **seven of ten functions, GBS organisations are involved** in more than half of the GenAI adoption

Source: PwC analysis and GBS point of view

About the 2025 Survey

70

companies participated in the survey

55

companies participated in the salary survey



New era of maturity

54,285

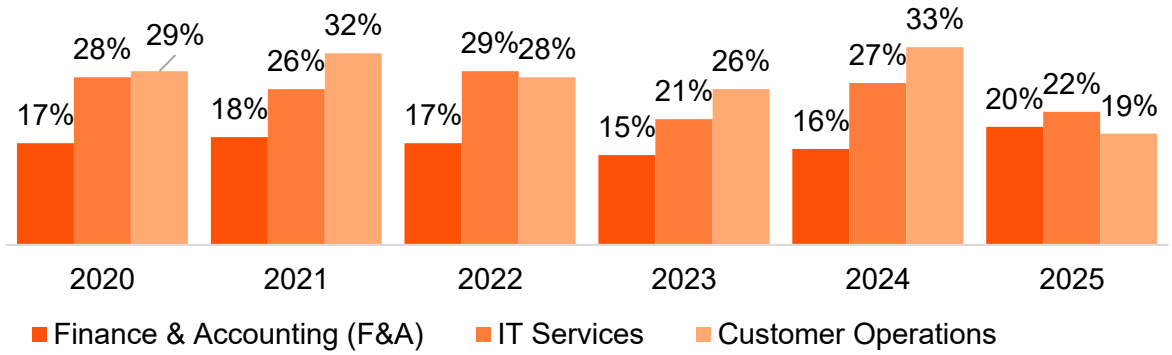
Employees covered by the survey

Based on the analysis of the common sample,

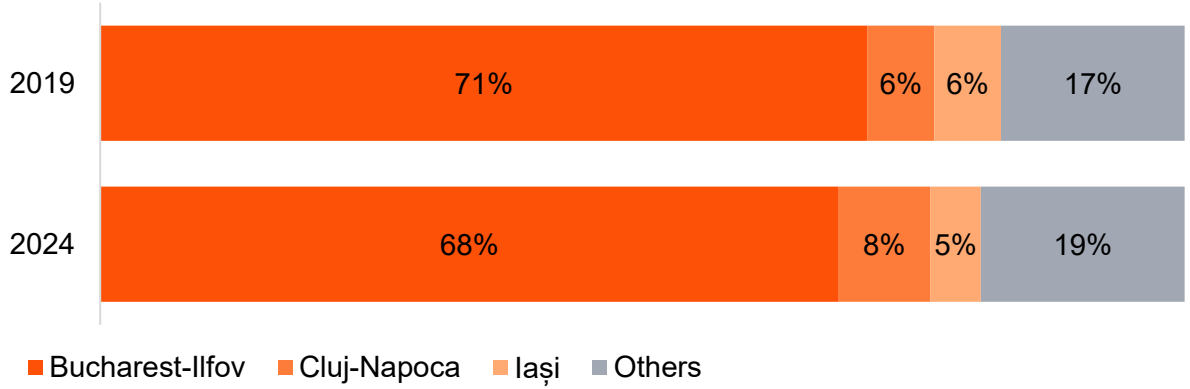
62% of the companies reported average increase of **3%-5%** this year.

Source: ABSL Report 2025

Top 3 service areas by number of employees



Distribution of employees by location



From Rapid Expansion to Controlled Growth



5%

average increase in the no of employees reported in 2025 vs 2024 (analysis on the common sample)

12%

average turnover growth in 2025 vs 2024

58%

of business expanded during 2024 and 61% declared increase potential in the following years

Source: ABSL Report 2025

Salaries continue to increase

RON 13,060

Average wage reported in our survey

5.83%

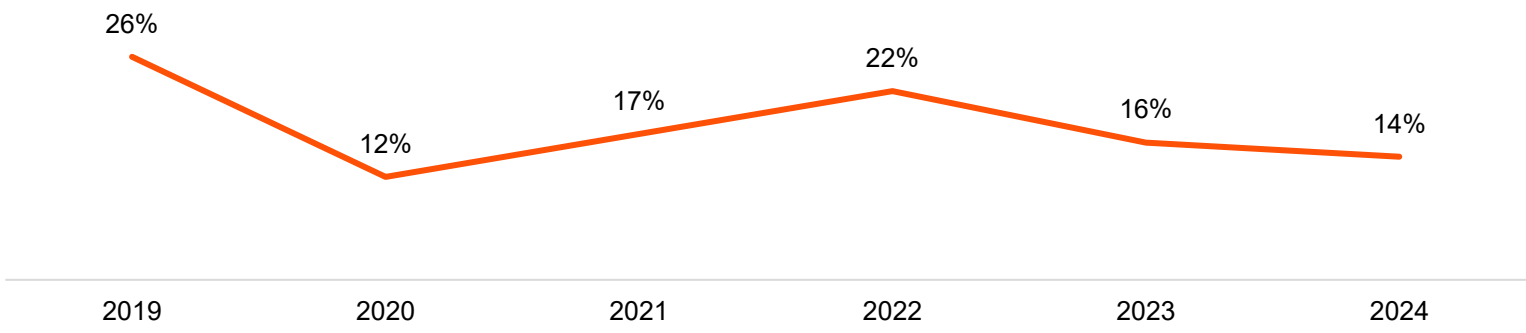
Average salary increase in 2025, as reported by participants

~6.00%

Planned increase for 2026, as reported by participants



Voluntary Attrition Rate %

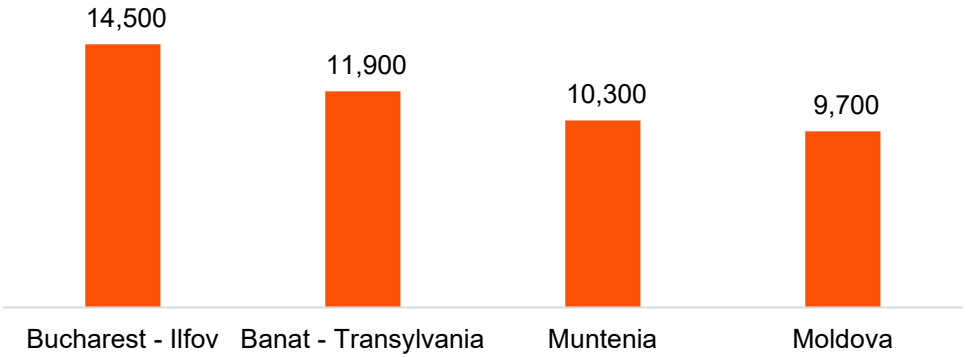


Source: ABSL Report 2025

Average wage highlights

Average wage by region

*Rounded gross amounts

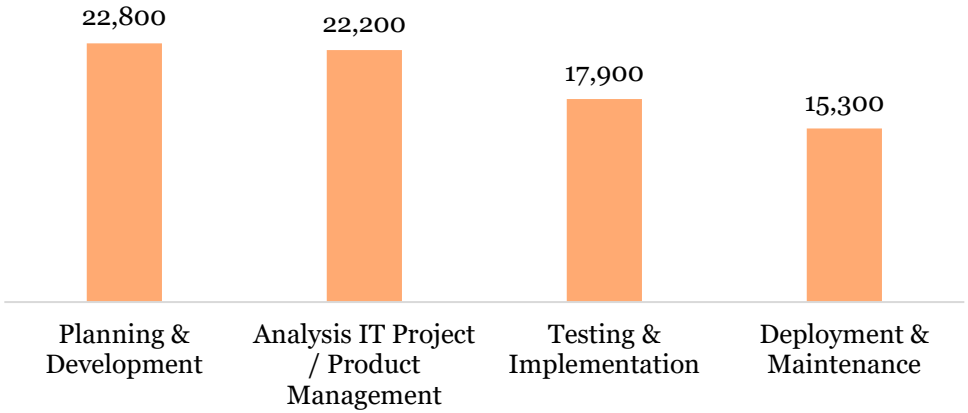


Six years wage evolution by key positions

Role	2020	2021	2022	2023	2024	2025	Increase 6 years	CAGR
Accounts Payable Specialist	6,000	6,550	6,354	7,958	8,632	9,574	60%	10%
Customer Service Specialist	5,467	6,408	7,243	7,694	7,876	9,449	73%	12%
Procurement Specialist	6,555	7,300	9,072	9,128	9,301	10,928	67%	11%
Payroll Specialist	6,375	6,912	7,319	8,662	9,952	10,816	70%	11%
Software Developer: Java	11,194	15,622	16,973	15,903	18,748	19,146	71%	11%

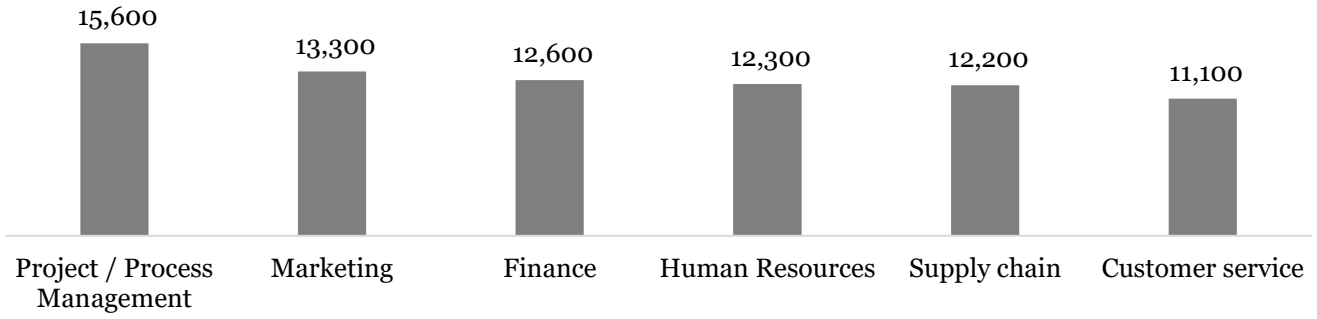
Average wage by function (IT)

*Rounded gross amounts



Average wage by function (non-IT)

*Rounded gross amounts



Source: ABSL Report 2025

Top 5 preferred benefits

49%

of companies offer flexible benefits

- Additional annual leave days: 86%
- Coffee and / or refreshments: 83%
- Meal tickets: 74%
- Medical subscriptions: 71%
- Flex time: 71%

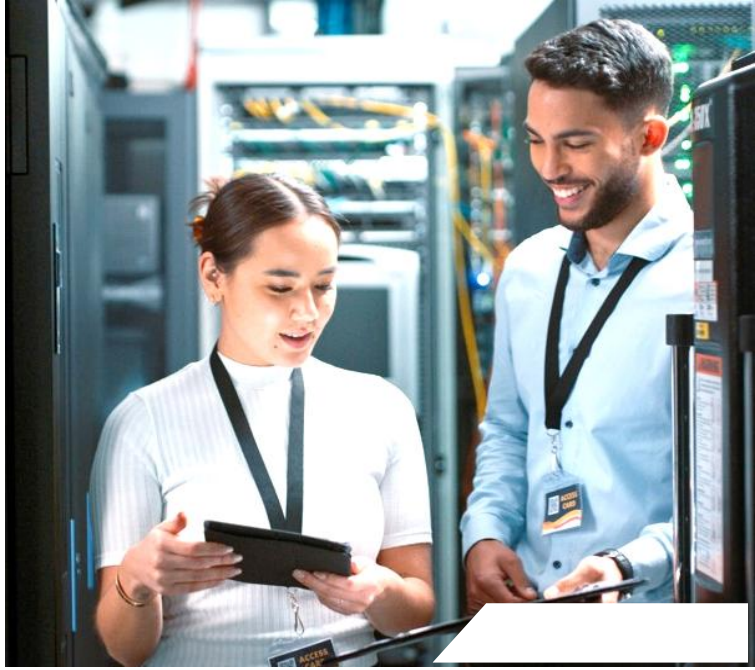


Source: ABSL Report 2025

Focus on the bridge to sustainability

Why GBS is well suited to drive the sustainability agenda

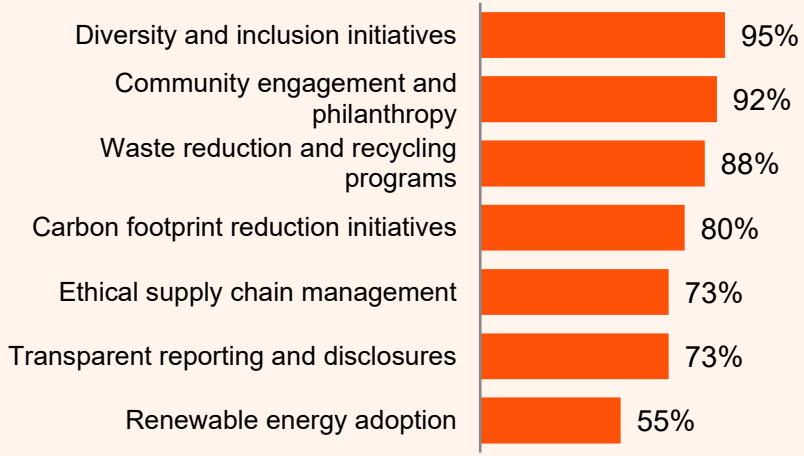
- **Access** to and custodian of operational and financial data highly relevant for sustainability reporting
- **Analytics and reporting** skills necessary for sustainability reporting execution
- **Global coverage** across multiple business units, legal entities and regions enabling consolidation for sustainability reporting
- Ability to scale up resources quickly owing to presence in locations with **larger talent pools** to manage **compliance timelines**
- Cost-efficient delivery resulting from labour arbitrage, **standardisation and consolidation** enabling the business to focus on broader sustainability topics



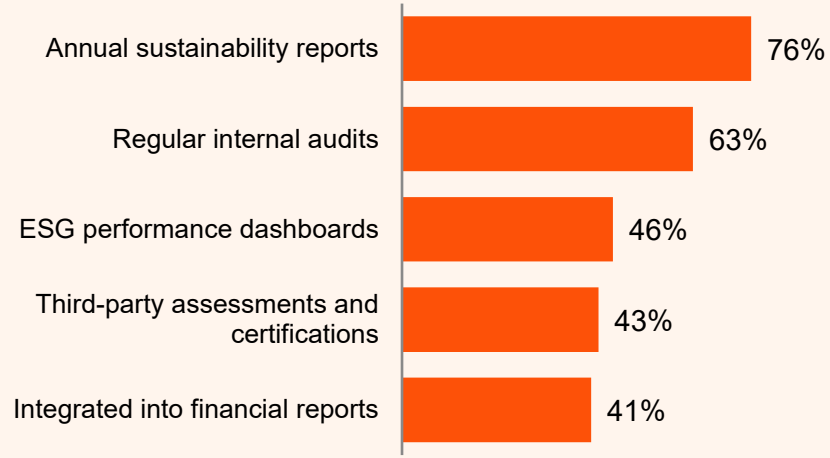
74%

of companies are in planning and advanced stages of implementation

ESG practices implemented



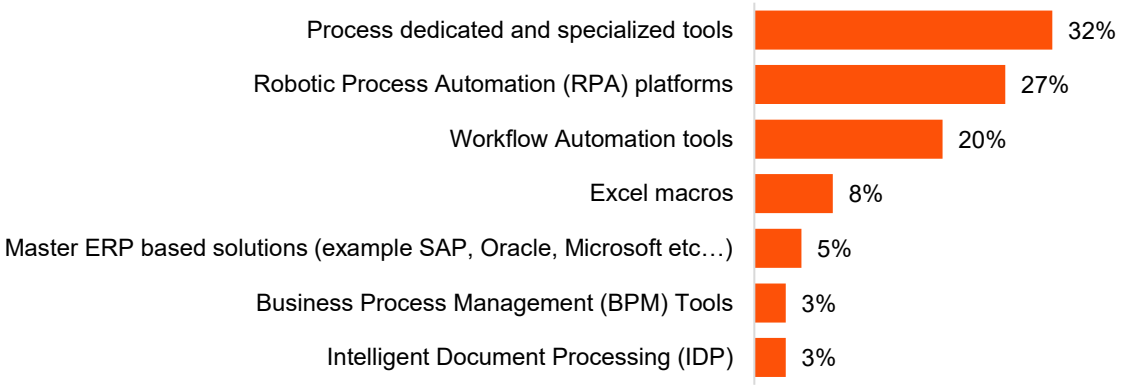
Monitoring and Reporting ESG performance



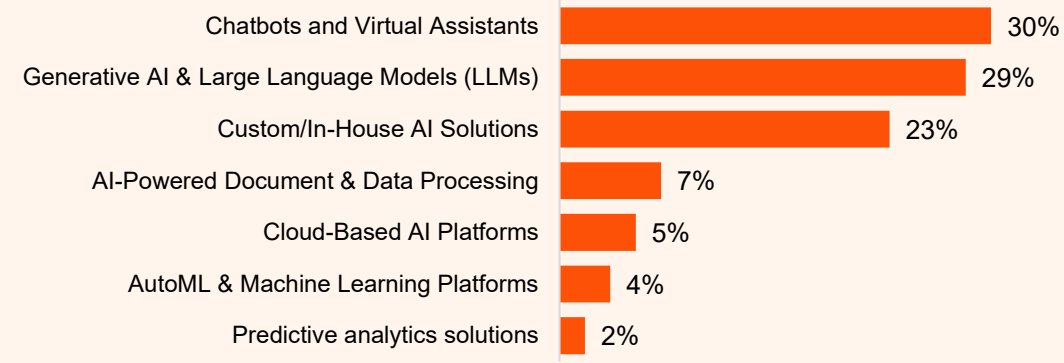
Source: PwC Global Study 2025, ABSL Report 2025

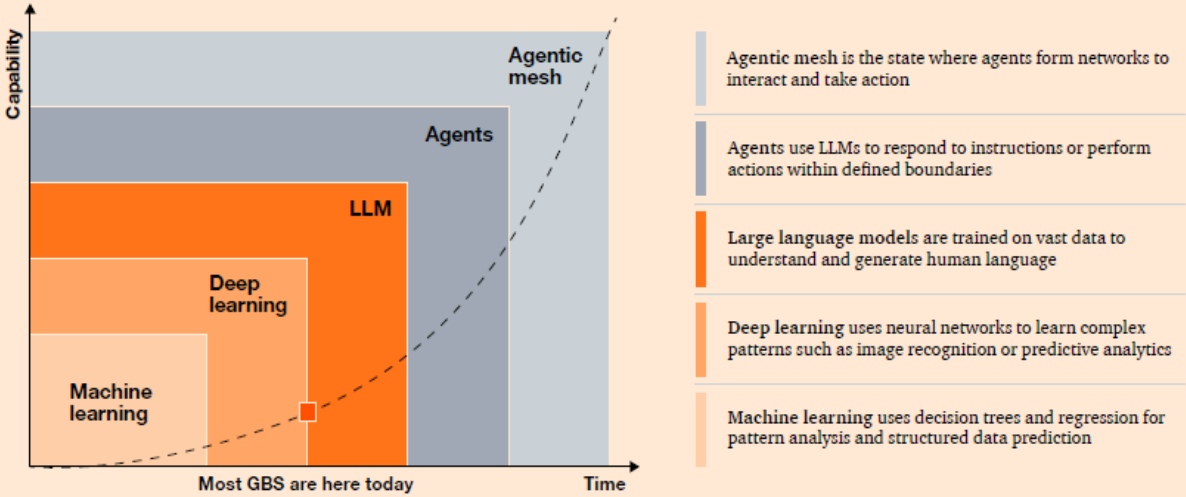
Technology assets adoption, agentic mesh as the next level

Automation platforms implemented in the last year

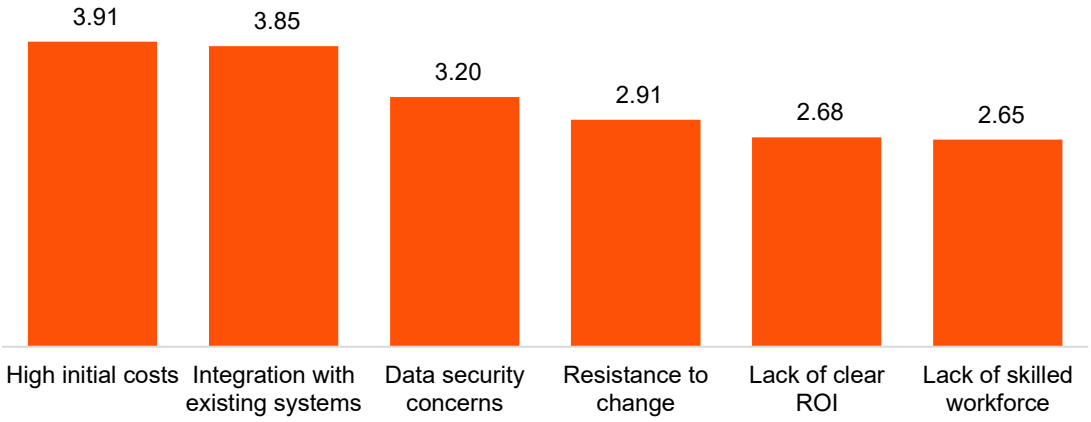


AI tools implemented in the last year





Key challenges in implementing technology



Source: PwC Global Study 2025, Insights from ABSL Report 2025

AI Assets aren’t just the future – they’re already on the job and delivering results

52%

Have an AI **strategic** dedicated budget or plan to **increase** in the next year

46%

Automated more than **25%** of their business processes

82%

Recognizes a **significant** impact on the workforce in the next 3 years mainly by **competencies** and **efficiency**

Source: ABSL Report 2025

Workforce readiness for agentic AI

A few years compressed in a decade of change



Redesign roles and skills: From Operators to AI Orchestrators

Traditional roles in GBS focus on manual execution and standard work. With agentic AI now in the picture, the value of human work lies in empathy, ethical judgement, contextual sense-making, trust and relationship building, creative problem-solving, and clear negotiation and communication.



Rethink the footprint: Talent ecosystems over arbitrage

Location strategy in GBS has been shaped by labour cost, language capability, and infrastructure. Agentic AI changes this. What matters now is access to AI-savvy talent, proximity to universities and start-ups, strong partner ecosystems, and the ability to compete for hybrid skill sets.



Realign performance and rewards

As routine processing is automated, traditional metrics like volume and error rate no longer capture human contribution. Redesign performance and incentives to reinforce behaviours that make AI safer, faster, and smarter.



Expand scope and value: move up the value chain

As agents take on more transactional work, GBS can shift from cost engine to value partner. The view across enterprise data and processes is an asset that must be used. Build scenario models for cash, supply, and workforce. Deliver root-cause analytics that drive product and policy changes.

Source: PwC Global Study 2025

With the changing GBS landscape, leaders need to adapt

CEOs are more likely than workers to anticipate impact from technological change, and so leaders must aim to engage their workforce in their vision for the future

>60% of employees and CEOs agree that GenAI will increase efficiency at work, but many also see **concerning potential challenges**, and less workers are using it regularly.

Frequent AI usage at work (daily or weekly) has significantly increased as compared to last year - **41% from 18%**, but we are still lagging behind globally respondents – 57% use AI with same frequency.

A significantly higher percentage of people believe **AI brings positive outcomes in productivity (64% as compared to 47%)**. In the global sample, the percentage is much higher - 74%. Also >70% of people believe it brings positive outcomes in quality of work and in creativity.

Source: Global Workforce Hopes and Fears Survey 2025 and Global CEO survey 2025 – data for Romania

Three actions leaders must take to build a change-ready workforce

These are the actions that, according to the survey, leaders must take to help employees understand and drive change

1. Lead through **transformation** to engage employees and help build resilience
2. Unleash the **power** of GenAI so that employees can keep up with **innovation**
3. Fuel **performance** through **upskilling** and the employee experience

Looking ahead, Business services leaders have identified several key priorities across performance dimensions to enable resilient growth



Growth

Turnover and earnings

- **Expanding portfolio of digitally – enabled service offerings** to better align with evolving customer expectations
- **Foraying into adjacent markets** to deliver more **integrated solutions** to customers and increase wallet share
- Complementing organic growth with **strategic M&A and partnerships** to accelerate time-to-market



Profitability

Cost and profit margins

- Prioritising **differentiated, higher – margin services** to improve the bottom line and drive sustainable growth
- Maintaining **strict cost discipline** to reduce overhead expenses and improve financial resilience
- Adopting **global delivery models** to optimise costs as well as access high-skilled talent across emerging markets



Productivity

Workforce and asset efficiency

- Expanding **investments in digital tools**, including generative AI (GenAI) solutions, to streamline processes and improve efficiency
- Investing in **talent pipelines and skill development** to equip the workforce with capabilities needed for future advancements
- Shifting to **asset-light models** to enhance capital efficiency and operational agility, allowing firms to scale with lower fixed costs

60% of companies expect business growth in the next period

7.1 is the average score that reflects the attractiveness of Romania for investments

Source: PwC Global Business Service Index 2025, ABSL Report 2025



Check out the 2025 report for more insights!

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