Paweł Panczyj

Poland

Facts & Figures
on Business Services Sector

Association of Business Service Leaders in Poland

The way we were…

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ASSOCIATION of BUSINESS SERVICE LEADERS IN POLAND

The way we are!!!

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WHAT IS THE GLOBAL POSITION OF POLAND?

Mature location for BPO

according to the Everest Group's Market Vista Location Heatmap

The Hackett Group ranks Poland third

as a global service centres destination, behind only India and China

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POLAND IN CEE

10 out of 23

No. of biggest offshoring destinations in CEE which are located in Poland

337 out of 847

No. of foreign capital BPO/ITO, SSC and R&D centres in CEE which are located in Poland (end of 2011)

KEY FACTS ON THE SECTOR

85,000 No. of employees in BPO/ITO, SSC and R&D centres in Poland (2011)	**38%** Polish share of employment in the sector in CEE
46% Polish share in employment growth of the sector in CEE (2009-2011)	**>20%** The greatest stability of employment growth in CEE (2008-2011)

Please note that these values concern only to the service centres with foreign capital.

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ca. 95,000

No. of employees in foreign capital BPO/ITO, SSC and R&D centres in Poland (IX 2012)

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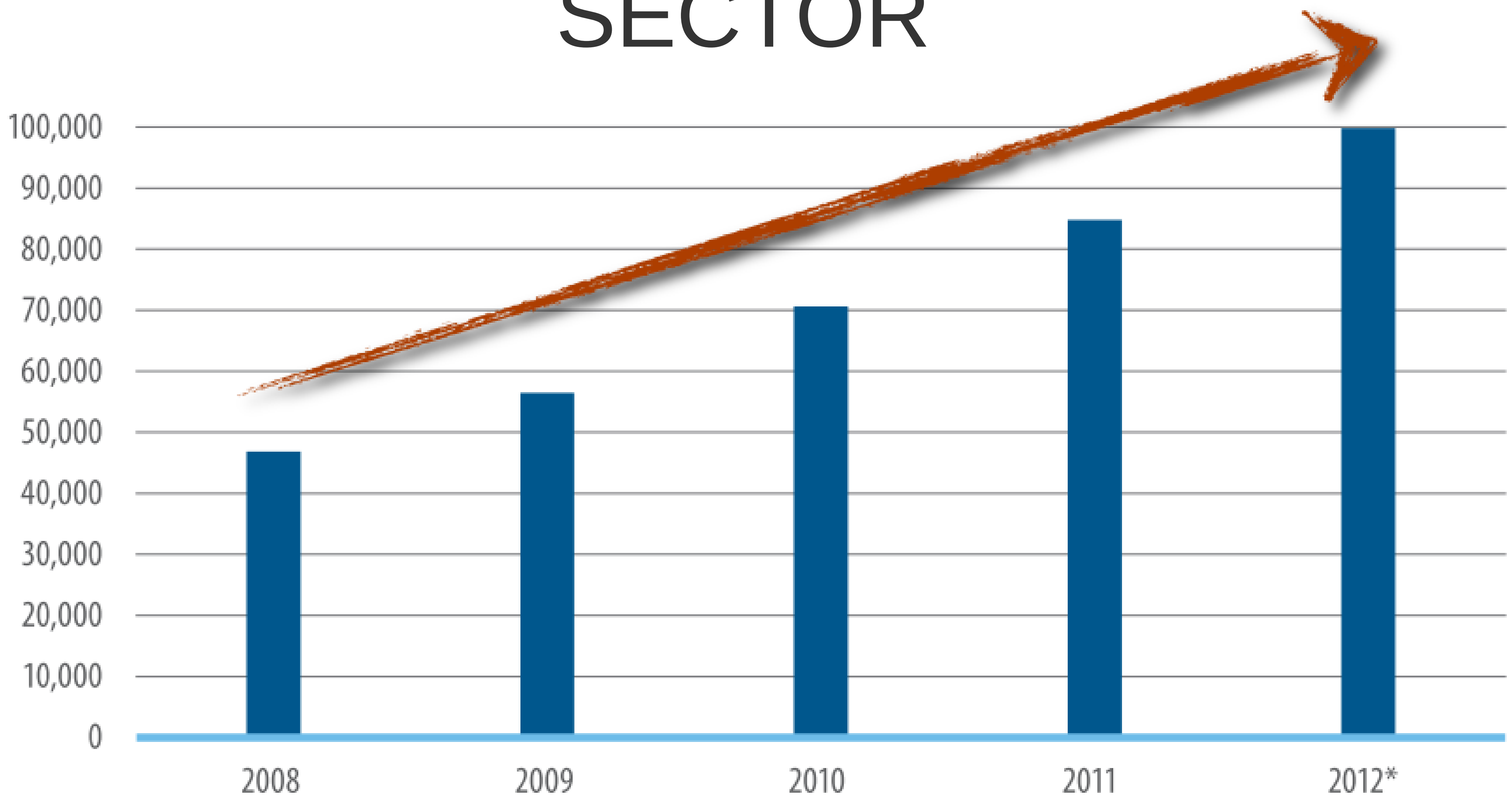
EMPLOYMENT IN THE SECTOR



Note: only foreign capital BPO/ITO, SSC, R&D centres

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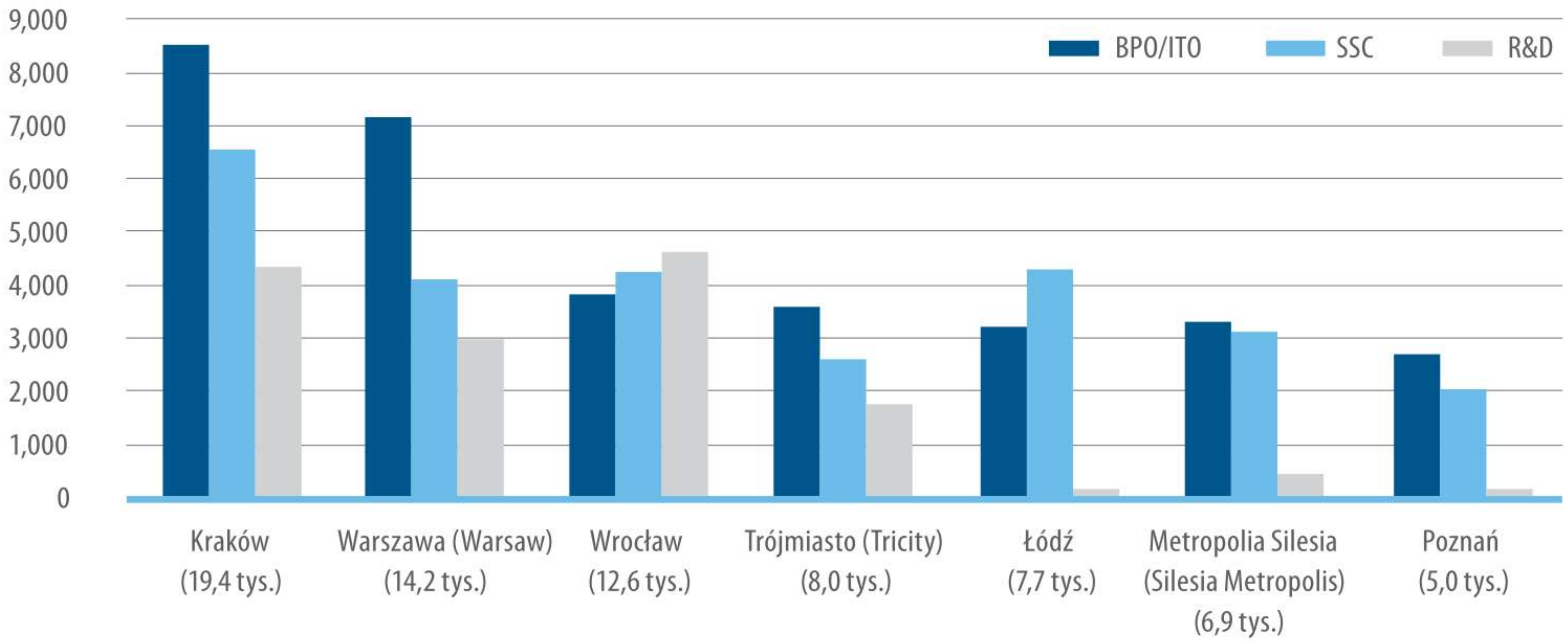
50%

Employment growth of the sector in Poland
(2009-2011; foreign capital centres only)

EMPLOYMENT IN THE CITIES



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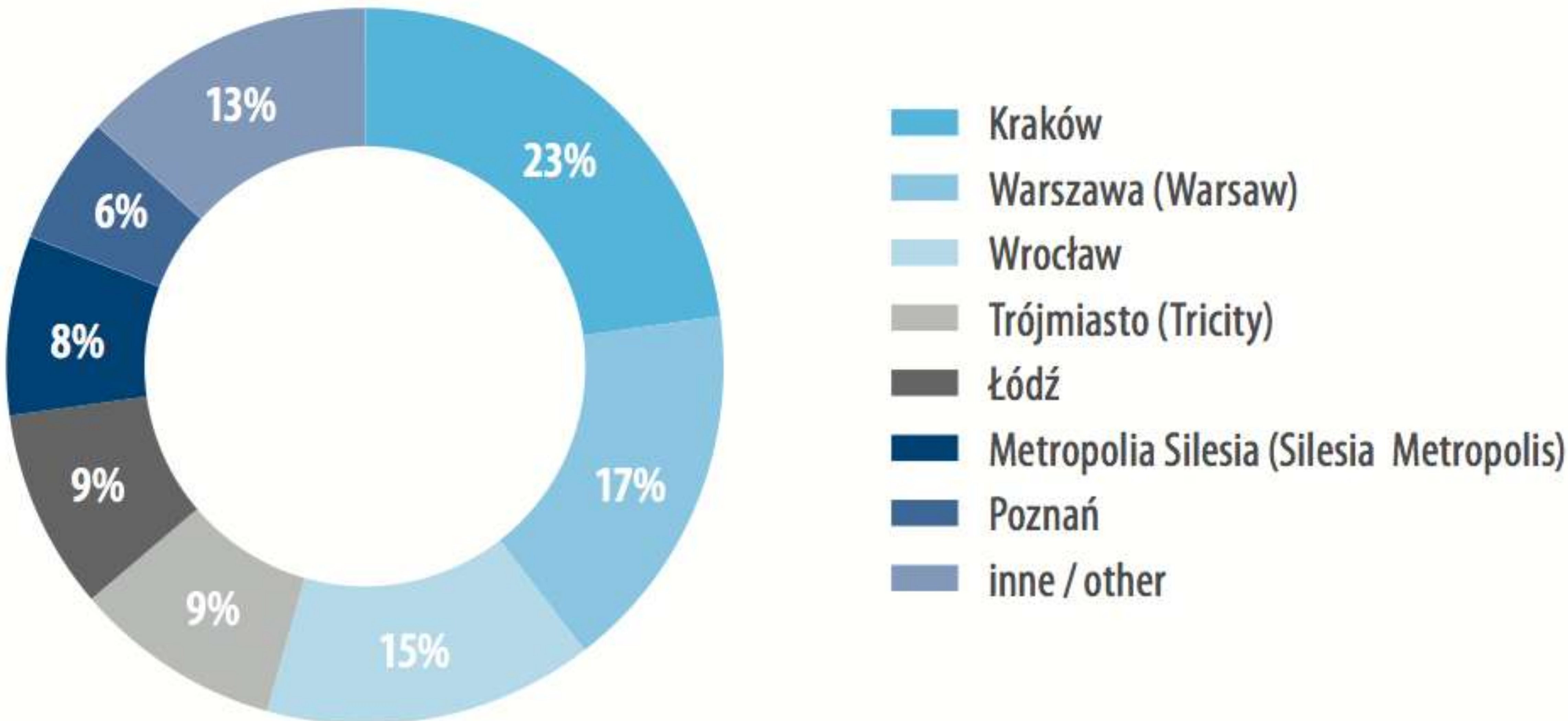
EMPLOYMENT IN THE CITIES



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SELECTED NEW INVESTORS (2012)

Tricity / Trójmiasto:
Bayer, Metsä Group, TURAZ, WNS Global Services

Kraków:
BBH, Cisco, Energy Micro, FMC Technologies, Heineken, Premier Farnell, EDF

Łódź:
BSH, Citi, HP, Sii

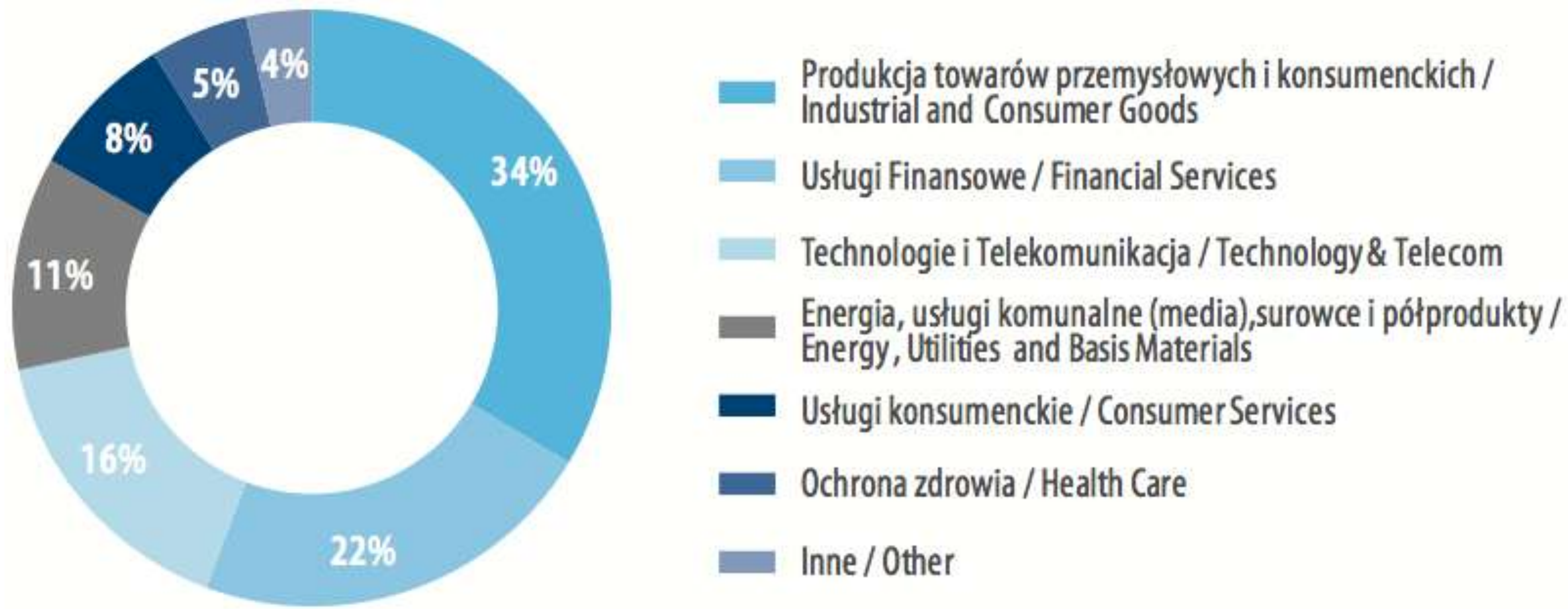
Wrocław:
Bank of New York Mellon, Becton Dickinson, Dolby, Luxoft

Other cities:
HolidayCheck, Capgemini, Pilkington, Philips, Metro Services

HOW BIG IS THE GROWTH? (2012)

Selected examples of the employment growth in business services companies:

BRANCH STRUCTURE OF THE SSC



The graph shows the structure of employment in the SSCs by industry of parent companies.

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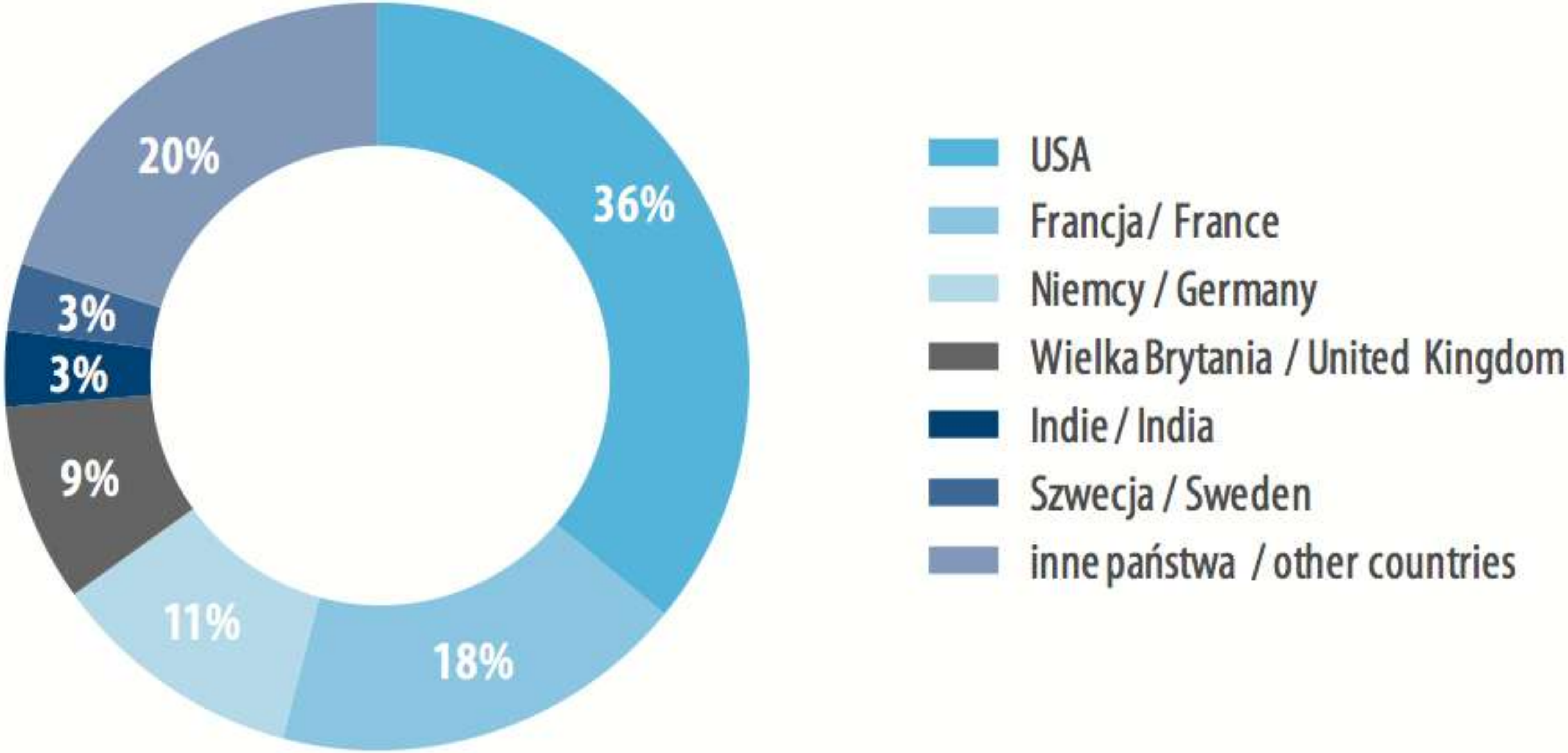
Structure of employment in foreign services centres as per origin of the capital



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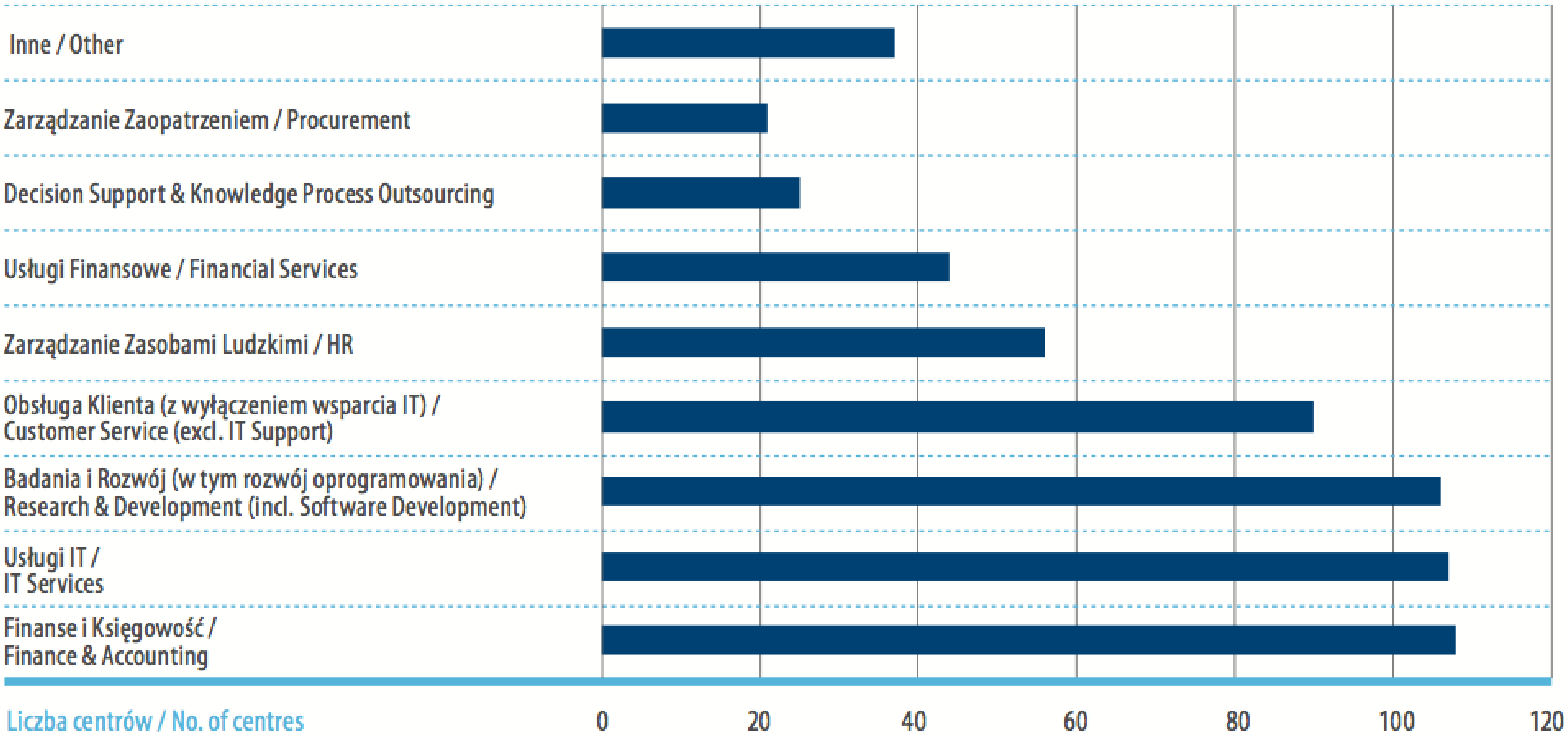
Types of services provided in foreign centres in Poland (2011)



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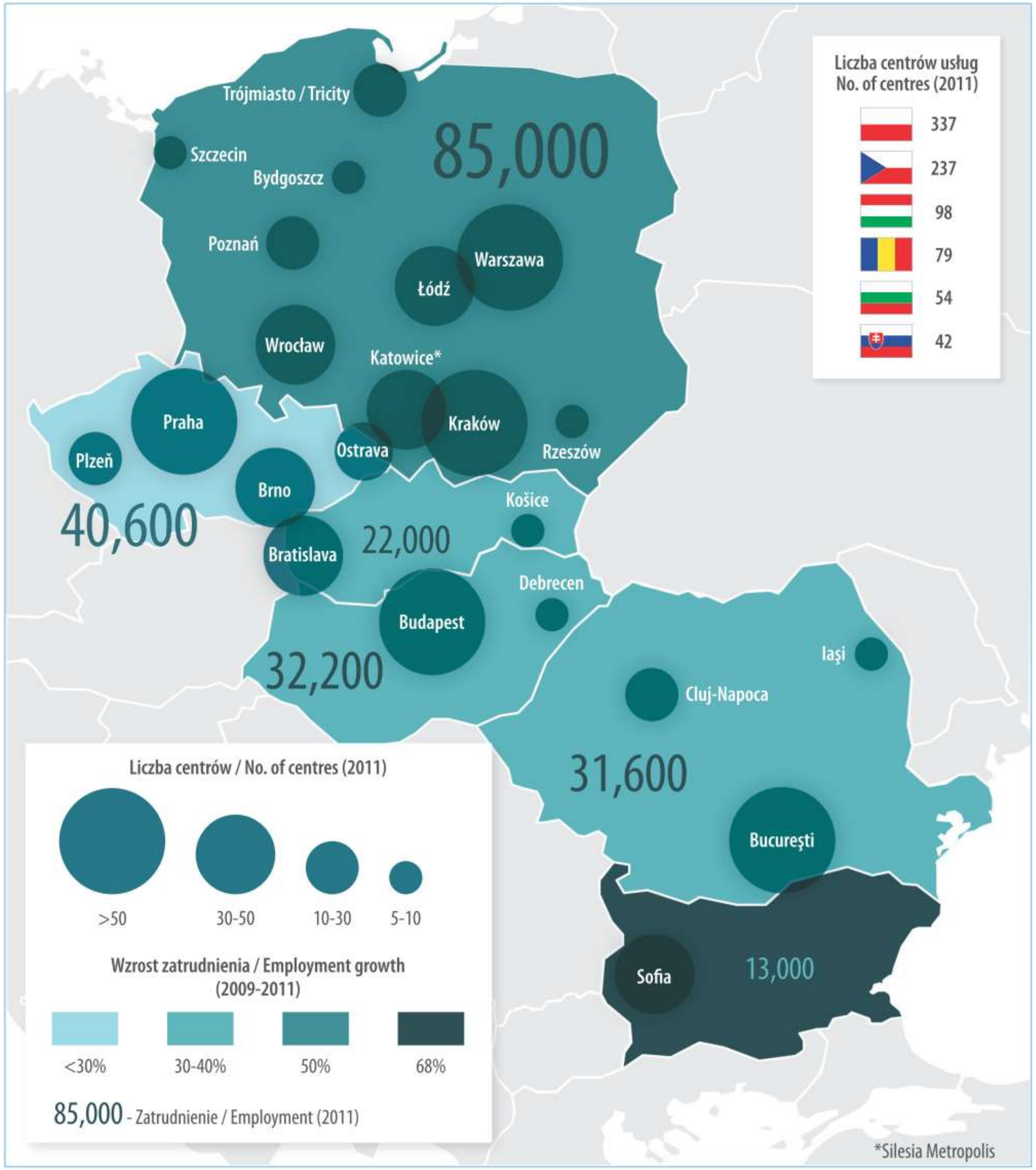
Participation of major agglomerations in total employment in the sector for the years 2008-2011

Ośrodek / Agglomeration	Udział w zatrudnieniu (%) Participation in employment (%) 2009	2011	Zmiana (p.p.) / Change (bps)
Kraków	24,6	22,8	-1,8
Warszawa (Warsaw)	17,5	16,8	-0,7
Wrocław	12,0	14,9	2,9
Trójmiasto (Tricity)	9,7	9,4	-0,3
Łódź	8,1	9,0	0,9
Metropolia Silesia (Silesia Metropolis)	8,3	8,1	-0,2
Poznań	6,2	5,8	-0,4
Ogółem / In total	**86,3**	**86,7**	**0,4**



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POLAND'S CORE STRENGTHS

Strong combined "value proposition"

Nearshore advantage with Western Europe as client

Growing complexity of business processes

More advanced services are provided

High number of cities being academic centres

So be ready for the unexpected…

Thank you
for your attention!