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BPO and Shared Services Centers

2012



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Letter from Editor:

In this annual business directory (our 4th edition), **Outsourcing in Poland**, published by **BiznesPolska Media**, we have tried to provide some insight into emerging trends in the sector in Poland and growth opportunities. The core of our effort has been to provide the most-exhaustive listing of companies in the outsourcing and SSC sector in Poland. Our definitions of outsourcing are deliberately broad, and includes the large sectors of shared service centers, BPOs providing external services, as well as R&D centers, IT and software development, and call centres. This year, we have a total of 600 firms listed.

In addition to a big thanks to our research team's efforts, led by Magda Adamczyk, I would like to thank PAIZ, the many city officials, ASPIRE and ABSL for their content contributions and listings of companies from the sector.

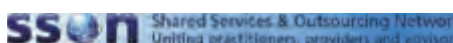
The sector in Poland is in good health, and looks set for another several years of strong growth.

I would also like to emphasize our distribution. We are pleased to have distribution agreements with the sector's key players at their major conferences: **World BPO Summit in New York** in June, **SSON Shared Services** conference in Stockholm in October and both **ABSL** and **ASPIRE** in September, in Sopot and Warsaw, respectively.

And look for our mobile application on iPad from mid-summer.

Thom Barnhardt, editor and publisher

Distribution:



Nordic Shared Services Forum 2012,
 October, Stockholm



Poland's outsourcing sector is growing up – and growing East

“Never waste a good crisis”

For the 111 American-owned outsourcing centers in Poland, the recent weakness of the Polish zloty is like manna from heaven. “The crisis will probably bring new business to outsourcing companies,” said Marcin Tchórzewski, vice president for Poland of US financial services provider State Street. Employment costs in Poland have decreased significantly since the beginning of the year, as the zloty/usd exchange rate has dropped nearly 20% in favor of the Americans.

Indeed, the world's crises seem to be a boon to Poland's outsourcing businesses. While the industry employed less than 50,000 people in 2008, the sector's rapid growth in recent years means that employment may exceed 100,000 by year-end 2012. And as the world takes notice of Poland's potential and performance, the quality of jobs are moving upscale, and the distribution of jobs is spreading throughout the country, particularly north and east.

According to research by ABSL (Association of Business Services Leaders), 38 new service centres and over 20 new investors came to Poland in 2011, with American investors leading the pack.

“The global crisis has worked to our benefit by giving us the prospect of further growth in our industry and the creation of new jobs in Poland”, said Marek Grodzinski, Vice-President BPO, Capgemini Poland.

While the “American” crisis rattled the world in 2008-2009, the “European” crisis is now centre-stage, unsettling capital markets and threatening the very existence of the European Union. Yet as Poland's outsourcing sector benefited from the American crisis by boosting its employment numbers, it looks set to benefit from the European crisis as well. Certainly not immune to the troubles of its western European neighbors and major trading partners, Poland's exclusion from the Eurozone - once a source of shame - has now become a source of safety.

American firms were forefront in the period 2009-2011 in their quest to reduce costs. Scouring the globe, many chose to outsource jobs to traditional locations such as India. Yet those with a major European presence have found that Poland's proximity to western Europe –geographically and culturally – provides an advantage that non-European locations can not provide.

Poland has reached a point where it is able to offer both competitive labor rates and

highly-skilled staff capable of carrying out more complex services.

“Major interest in Poland is now coming not just from the Global 500, but the Global 10,000”, said Andrew Hallam, founder of ASPIRE, the association of outsourcing/shared services investors, based in Krakow. He said that while the growth in recent years has been spectacular, the best is yet to come.

“HQs are no longer asking if it can be done in Poland, but rather they are asking their managers why it can't be done in Poland”, said one shared services executive at ASPIRE's May Outsourcing conference in Krakow. “The shift in perception of Poland is significant as more multinationals open centres here.”

Pressure valve of Eastern Poland

As the traditionally-strong outsourcing cities such as Krakow and Wroclaw continue to attract new investment and higher value-added jobs, such as financial analysis and mobile technology R&D, smaller Polish cities are keenly aware of the financial and political advantages of landing new business services investors. Comparable to a pressure valve, cities like Kielce and Lublin are keen to attract jobs that cities like Krakow might now eschew, such as call centres and rote business processes. And Eastern Poland, a fabricated construction of Poland's poorest five voivods, is tapping into substantial subsidies from the European Union, whose Regional

Development Programme aims to narrow the gap between less-developed regions and their wealthier neighbors. (See related story: Subsidies)

Mayors of cities in eastern Poland such as Kielce, Bialystok, Rzeszow, Lublin and Olsztyn are aware of the need to support office development, build the city's brand and trumpet the potential of their young, well-educated workforce.

Different models and shifting sands

Firms such as EDF, with a strong presence in Poland with multiple energy-related subsidiaries, have chosen to outsource “with a twist”. Instead of the traditional establishment of a shared-services centre serving western Europe or the world, EDF has set up a shared services centre for only its Polish subsidiaries, deftly dodging the potential political fallout of “outsourcing” jobs from France. The emphasis in this model is on operating efficiencies, not labor cost savings.

Polish firms are also increasingly aware of the advantages and efficiencies to be gained through consolidation and bundling of jobs in one location. While the labor cost advantages may be minor, the operating efficiencies and reduction of office costs can be significant value drivers. The recent opening in Pila, a relatively small town north of Poznan, of an outsourcing centre for a Polish energy utility is another sign of the growing awareness of the advantages of outsourcing for Polish firms.

And much like Poland is “east” for western Europe, east for Polish firms is eastern Poland and Ukraine, where wages are substantially lower than in major Polish cities. Accounting Plaza, recently acquired, last year set up operations in the Ukrainian city of Lwow, which is attractive to Polish firms since a large percentage of the population speaks Polish. And Impel, the Wroclaw-based outsourcing firm, recently announced expansion plans for Ukraine and Russia.

Public-sector outsourcing is virtually nonexistent, and presents another opportunity for growth, as state-owned enterprises are squeezed between budgetary constraints and a growing awareness that they must improve their return on assets. While the US and UK governments are a major force in outsourcing (everything from real estate management, cleaning, document management and storage, finance and accounting, and HR/personnel), the Polish government and its various ministries and departments



are just now waking from a long slumber and being forced to consider outsourcing more services.

Indians coming

Another emerging player in Poland's outsourcing sector are the Indians. While the Americans' expansion has been largely driven by cost-reduction and smoother interac-

Singh, founder of the Indo-Polish Chamber of Commerce, which organizes bilateral trade conferences and events between Poland and India each year.

Another advantage for Poland, according to Singh, is that Poles do not need visas to travel around the EU, they are in the same time-zone as western Europe, and share legal, linguistic and cultural characteristics

"HQs are no longer asking if it can be done in Poland, but rather they are asking their managers why it can't be done in Poland"

tion with the European market, Indian firms are coming from the other direction – being driven by their clients to offer services for their European operations. Wipro, a pioneer in the Tricity market, has blazed the trail for Indian firms, having set up operations several years ago with a focus on IT. Gdansk recently landed WNS, a large Indian client which has plans to set up a F&A centre serving western Europe in multiple European languages, a task nearly impossible to do from Bangalore.

"Many more Indian firms are looking at setting up operations in Poland", said J.J.

with their customers. Indians, for example, still need visas to enter the Schengen zone, an annoyance that continues to rile the Indians who are working and traveling frequently to Poland.

From single services to multi-functional

As Poland's outsourcing sector grows up and matures, global firms are increasingly using Poland as a base for multi-functional business services. Instead of only providing basic accounting services, for examples, firms are shifting more work to Poland, including

HR/compliance, procurement, and real estate asset management.

"Many of the centers are the headquarters of outsourcing organizations for Europe or the EMEA region", said Andrew Hallam of ASPIRE.

Indeed in early spring, BNY Mellon, a provider of investment management and investment services, announced plans to open a new Global Delivery Centre in Wrocław, where staff will work in the areas of fund accounting and investment operations. "Poland is a central location within Europe, offering high-quality staff and infrastructure," said Martin Ring, who is leading the development of BNY Mellon's operations in Wrocław.

Another global financial institution, State Street, opened a new office in Kraków in May, adding to the two locations it already has in the region. It plans to launch its Investment Analytics service later in 2012, and by 2015, the company will recruit nearly 600 professionals, to support its various financial services.

"Poland has become a key European location for fund accounting, securities valuation, exchange traded derivatives and hedge fund administration," said Joseph Antonellis, who is vice chairman of State Street and leads all Europe and Asia-Pacific Global Services and Global Markets.



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Poland as a top European shoring destination

2011 saw Poland strengthening its position as a leading global shoring destination. It was named by Everest as the most mature offshoring location in Europe and one of the Top 5 worldwide. Also Hackett Group identified Poland as one of the most interesting offshoring venues for international investors and Kraków was ranked 11th globally in the TOP 100 outsourcing destinations by Tholons. Poland currently accounts for 40% of the total headcount in outsourcing centres in Central and Eastern Europe (CEE).

Jacek Levernes, President of ABSL, commented "The business services sector in Poland currently provides employment to over 85,000 people, up by 50% compared to 2009. We expect that a total of 100,000 people will be employed in the services sector in Poland by year-end 2012. The country is attracting increasingly more advanced services and processes. Today the country successfully competes for outsourcing projects with places such as China or India and is amongst the top five global outsourcing destinations."

"Business Process Outsourcing and Shared Service Centres account for most of the projects of the Polish Information and Foreign Investment Agency (PAIIZ). 30 out of 149 investors we currently work with in Poland represent the offshoring business which is an equivalent of over 7700 potential new work places." said Slawomir Majman, President of PAIIZ.

In respect of headcount, PAIIZ estimates that 45% of the existing "outsourcing" centres in Poland are Business Process Outsourcing (BPO) centres and IT outsourcing centres (ITO), followed by Shared Service Centres SSC (35%) and Research and Development centres R&D (20%). Most typical processes executed by Poland-based outsourcing centres are finance and accounting,

DEALS

Genpact Limited, a global leader in business process and technology management, acquired Accounting Plaza, a provider of finance and accounting (F&A), human resources (HR) services and PeopleSoft ERP services to Ahold, a major international retailer, and other clients in the retail, wholesale, banking and healthcare industries. The acquisition will significantly expand Genpact's domain expertise in the retail industry in addition to its service delivery footprint in Europe. Terms of the deal were not disclosed.

With the acquisition of Accounting Plaza, Genpact now has a strong services delivery operations in The Netherlands with Dutch language capabilities as well as an expanded services portfolio in Europe including human resources business process management, e-invoicing and PeopleSoft ERP related services. Genpact will also bolster its F&A services offerings for the retail industry in areas such as store and franchise accounting, inventory accounting, and trade promotions.

"This deal gives Genpact domain expertise in the retail industry, an industry which is transforming globally. Along with finance and accounting, one of our core capabilities, we now gain tremendous traction in the retail industry," said Tiger Tyagarajan, president and CEO, Genpact. "The addition of operating centers in The Netherlands will further expand and grow our business in Europe, especially with large European multinational corporations. We're looking forward to partnering with Ahold Europe and applying our capabilities in smarter processes, analytics and technology to help support their growth plans."

Accounting Plaza has approximately 600 full-time employees working out of its centers in The Netherlands, Poland, and Czech Republic. It was founded in 2000 as the F&A and HR services provider for Ahold, the sixth largest retail company in the world. Within Europe, Genpact operates three delivery centers in Romania as well as centers in Hungary, Poland, and Morocco, serving more than 25 languages.

IT as well as research.

The predominant countries of origin are those within the European Union (France, Germany, UK, Sweden, and the Netherlands) as well as the United States. The sector gives employment to university graduates and students with fluent English, German, French, Italian and Spanish as well as other less popular foreign languages such as Danish, Swedish, Norwegian, and Dutch amongst other. Services are delivered in a total of 34 different languages with a typical employee being 29-30 years old with approximately 3 years of professional experience. This is unlike only a

couple of years ago when SSC and BPO/ITO centres were recruiting mainly new graduates. Interestingly, employers are increasingly competing for a talent pool who are not only experts in areas of specialization such as IT but also have a general knowledge about the sector the company is active in.

The dominant three markets in respect of headcount in the services sector are Warsaw, Kraków and Wrocław with SSC and BPO/ITO staff respectively of 20,000, 10,000 and 10,000. In addition, Tri-City and Poznań are also recently receiving a lot of interest from BPO/ITO and SSC investors. McKinsey & Company and Samsung invested in Poznań in 2011 while Bayer, OIE Support and Metsa Group have all committed to the Tri-City market, as well as the recently announced Indian firm WNS. The seven biggest Polish agglomerations i.e. Warsaw, Kraków, Wrocław, Łódź, Silesia, Tri-City and Poznań have about 80% of all service centres in Poland, driven by strong universities and higher-education centres, and a reasonably wide availability of office space, albeit differences exist between particular markets.

Impel

Wrocław-based Impel is making plans to expand in Russia, initially to offer cleaning services for private commercial developments and public buildings, said Danuta Czajka Impel's group vice president. The firm established operations in Kiev with joint-venture partner Griffin Group, and revenues are growing in the double-digits quarterly, after an initial period of stagnation. "Ukrainian authorities are outsourcing health care services and other key sectors of the economy, such as energy", said Wojciech Rembikowski Impel group vice president.

Impel is the largest Polish provider of outsourcing services, ranging from office cleaning to IT services, and had

revenues in the first quarter of 2012 of 333 million zł, an increase over the previous year of 15 percent. Operating profit was 8.2 million zł. Impel makes most of its money from its cleaning division, and offers such services to hospitals and other institutions, supporting more than 120 firms. But the public sector outsourcing remains a difficult sector. "The short-sighted policy of the state is ruining the market. We estimate that prices for services for the public sector have declined in recent years by almost 25%. It's increasingly an art just to stay in the game, especially when labor costs are systematically increasing", said Rembikowski.

Association of Business Services Leaders in Poland (ABSL) along with its strategic partners Jones Lang LaSalle and Hays and supporting member Baker & McKenzie released a new report in spring 2012 on the Business Services Sector in Poland.

Gregoire Nitot

Sii Sp. z o. o.

Warsaw, Gdansk, Wroclaw, Poznan, Krakow, Łódź

Headquarters (global): Paris

President

Operations in Poland:

Sii in Poland was founded in 2006 in Poland. Sii is one of the fastest growing IT & product engineering Outsourcing companies in Poland. We provide services in the fields of building and maintaining IT applications, testing, systems integration, software factory, IT infrastructure management, IT business solutions, IT consulting, product engineering, embedded software, automation. Currently employing 1000 professionals in 6 locations: Trojmiasto, Warsaw, Wroclaw, Krakow, Poznan and Lodz.

How has your business changed?

In 2006 services provided by Sii were focused mainly on IT services: we recruited the best specialists for our clients in whole Poland. The 6-year-long experiences on IT market afford Sii to develop our services into mature, advanced system integration & long term outsourcing projects. Sii is presently focused mainly on 4 fields: IT Application services; IT Infrastructure services; Product Engineering services; and a Testing factory. We cre-



ate solutions in accordance with individual requirements provided by each customer, in Client's place or totally outsourced in Sii IT and engineering delivery centres.

Employee issues:

The strongest arguments for opening Sii in Poland were a huge requirement for IT services and highly-educated and motivated young specialists. The mission of Sii is to identify and promote our best people. Our team has now 900 well-educated IT specialists, individuals, who need to be very well managed in order to be a great team and provide the best quality for our clients. Our employees are able to build and manage big IT teams delivering effective projects according to individual client's requirements in very specific and advanced fields like e.g. production engineering. With such a positive team it is a real pleasure to lead a company in Poland.

Any critiques of operating in Poland

There are some certain things which are impeding for business: bureaucracy in tax offices, tax law which is not clear enough and badly-organized Polish administration. There are also some unclear labor law regulations concerning different employment forms like freelance and permanent contracts.

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candidates

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Manager's Profile

Edwin Bennaars

ArcelorMittal (Dabrowa Gornicza)
Headquarters (global): Luxembourg & London
Chairman of the Board of Directors & Chief
Executive Officer Shared Service Centre Europe
ArcelorMittal
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Operations in Poland

Shared Service Centre Europe ("SSCE") delivers back office services for the European ArcelorMittal entities. Key objective of SSCE is to become the Best in Class Shared Service Centre within ArcelorMittal supporting the organization with the delivery of back-office services in the areas of Finance, Accounting, Tax and Payroll.

with a broad range of back office services. Going forward SSCE expects to grow further due to continuous efficiency demand of the Europe Mills related non-core processes.

Advice to other managers about setting up:

When setting up and/or managing a Shared Service Centre be aware of the 3 "P's": People, Process and Partnership.

To ensure a right level of services I recommend my colleagues to make sure they put a good people development plan in place. Poland has a big BPO and SSC market and talents shift easily between companies. If you have a good people development process in place you do not only manage the quality of the services but also ensure your attrition rate is manageable/acceptable.

Employee issues:

Everything starts with people. Within SSCE we have different programs in place to create an attractive working environment for all the employees. Key programs are around continuous learning and development. In addition we realize that we are working with highly motivated and talented youngsters who want to continue develop and grow. Within our centre we ensure that people can grow within the centre and/or ArcelorMittal Group. It's up to my Director team and myself to ensure that talents are become visible, not only for us but for the whole group.

Positive surprises – and critiques – of operating in Poland:



SSCE is working from out of 3 locations: Dabrowa Gornicza/Katowice, Pune India and Timisoara Romania.

How has your business changed - in terms of services provided - over the years?

One of SSCE's key objectives is to support the Group with the execution of back-office activities in the most effective and efficient manner in terms of cost, quality, control and transparency. Since the start of the Shared Service Centre in 2008 we are continuously expanding scope in terms of Entity coverage and Process Coverage. At the start of the centre in 2008 SSCE was only delivering accounting services for the ArcelorMittal Eastern European Mills. As of now SSCE is covering services for all Mills throughout Europe

Relating processes: lots of SSC "start-ups" are applying the so called "lift and shift" approach at the start of the development. For the short term there may be a good business case doing this, however at the end SSC's are "in the game" of productivity, which means that you have to carefully look at your processes and systems in terms of harmonization and optimization.

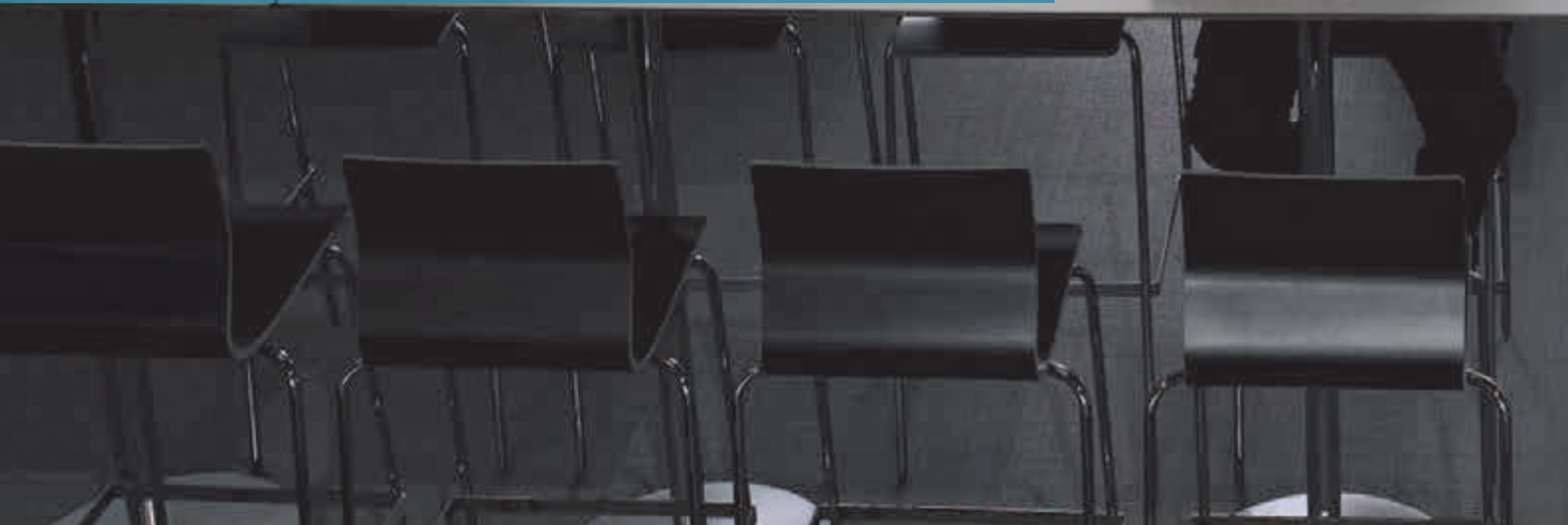
Regarding partnership: Be aware that SSC's are in the service delivery industry which means that you have to meet the right level of customer satisfaction. To meet and/or exceed the client expectations, try to always strive for partnership and added value even on the routine type of activities handled. Please also listen to your clients and be open for criticism!

Although being based in Poland, I always explain to my customers that labor arbitrage is not the only driver for establishing a centre in Poland. Bottom line: it is all about the quality of the people, processes and systems and realizing that managing a Shared Service Centre means that you have to continuously "play the game" of Productivity.

Although there is cost difference in Poland compared to Western Europe, the quality, motivation and innovation of the people in Poland is at the same and/or better levels than Western Europe. So bottom line: cost is one aspect, but do not forget the great quality of the people in Poland and their continuous initiatives to adapt, improve and innovate. ■



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Headquarters (global): Bangalore

Center Head Infosys BPO Poland

Agnieszka_Jackowska@infosys.com

Operations in Poland

Advanced Finance & Accounting (F&A) processes account for more than a half of Infosys BPO operations. Our center also delivers complex services in the area of sourcing and procurement, logistics claim handling, master data management, trade promotion management, consulting, project management, internal audit and SOX, controlling, tax management, as well as implementation of programs optimizing our Clients' business operations. Infosys Lodz Center is also a SAP hub for the company's European clients.

How has your business changed over the years?

The dynamic growth of our center, which currently employs more than 1300 specialists, results first of all from the increasing complexity of Infosys offer, as well as from broadening the service portfolio to include new processes. Over the last few years our center has expanded the

range of delivered services, among others by database management, marketing process management, sales and fulfillment management and software implementation. Delivery of advanced, high-end services is one of the key elements of our center's operational strategy, which is oriented towards achieving our clients' long-term business objectives.

Advice to other managers about setting up:

A key element of the investment process is the transition phase, which also includes relocation of a part of processes. The efficiency of the center's operations relies on this phase, and therefore, companies which do not have experience in this area should rely on external expertise. An example of a center offering this type of expertise is Infosys BPO Poland. Our specialists create dedicated solutions concerning processes relocation and actively participate in their implementation.

The success of a new investment project of course depends on the combination of many different factors, especially building relations with local authorities. It is thus vital to become a part of organizations connected with the sector, whose objective is to exchange knowledge and best practices. An example of such an or-

ganization is ABLS – which works on two levels – national, as a partner of the Ministry of Economy and Polish Information and Foreign Investment Agency, and local – organizing ABSL Regional Chapters – meetings between sector's investors and representatives of local authorities, universities and employment agencies. Membership in such organizations allows the investors to become familiar with the specific character of a given country and region and enhances networking.

Employee issues

Infosys Lodz center's success is to a huge extent the result of our specialists' high competency and their motivation for continuous professional development. Therefore, our company puts great emphasis on building and implementing an extensive talent management program, thanks to which our employees are able to develop their knowledge and acquire new skills on a regular basis. Our employees also participate in courses that allow them to perfect their language skills. Moreover, the center co-finances post-graduate, Ph.D. and MBA studies and participation in various certification programs conducted by international organizations such as ACCA. An additional motivation factor for our employees is Infosys' participation in different local community and charity initiatives.

What are the challenges we encounter? On the Polish labor market there are still too few employees who, on the one hand know rare foreign languages, like Dutch or Danish, on the other have specialist competencies, such as SAP knowledge. To minimize this disproportion our company actively cooperates with academic centers. The aim of this cooperation is to make students' and graduates' competencies compatible with the current needs of business.

Positive surprises – and critiques – of operating in Poland:

The assets of Poland as a business services investment location is a good access to well-educated specialists and the openness of local authorities to cooperation with business representatives. What should be improved? Polish cities need a coherent and well thought out marketing strategy oriented towards attracting new investors. Representatives of the major Polish agglomerations should regularly participate in international economic events, conferences and trade fairs.

An important issue in the face of an impending decline in the birth rate, is working out a strategy concerning ensuring the supply of specialists. The quality of higher education and tailoring the curriculum to the actual needs of business is crucial for Poland's investment attractiveness. For Infosys, it was important that Lodz is a multicultural city, which is crucial from the point of view of foreign business operations. ■



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**Page
Personnel**

Tholons 2012 Top 100 Outsourcing Destinations

Eastern Europe continues to emerge as a stellar outsourcing destination, especially for higher value services. Of the 21 Eastern European cities included in the Top 100 List, two cities are part of the Top 10 Emerging Cities for the Tholons 2012 Top 100 Outsourcing Destinations report. Kraków remains as the top emerging location for services outsourcing.

Tholons surveyed countries such as Poland, the Czech Republic, Hungary, Russia, Romania and Ukraine to analyze prevailing regional dynamics, key challenges, and the possible outlook for the development of the IT-BPO industry in the region.

The 2012 Top 100 Outsourcing Destinations saw the entry of four new Eastern European cities – Lviv (91st), Cluj-Napoca (96th), Minsk (99th), and Zagreb (100th). At the same time, the Czech Republic's Tier 1 location – Prague – improves its rankings and moves up to the 10th emerging city rank for this year's list.

NASSCOM figures indicate that the region captured a 20% share of the total number of delivery centers set up in 2010, only next to

that of India. Of these delivery centers, around 65% was located in Tier 2 cities. This is reflected in the upward movement of Tier 2 locations in Eastern Europe, as seen in Wrocław as the biggest gainer city in the list. In 2011, Ernst & Young opened a shared service center in the city, targeting to employ 250 Finance and Accounting practitioners.

The Tholons 2012 Top 100 Outsourcing Destinations report also mentions that the strength of services outsourcing in the Eastern Europe can be primarily attributed to its supply of a technically skilled labor pool - recording 500 to 1,500 tertiary graduates for every 100,000 population. For instance, Czech Republic has almost 920 tertiary graduates for every 100,000

people in the country. The country's engineering and related graduates are around 17% of its tertiary Type A graduates, according to CzechInvest. Due to this labor supply advantage, the region has become the immediate choice for many Western European service buyers of high value processes, such as those found in the R&D and ITO spaces. A real-world testament to this trend is the investment of manufacturing giant Gardner Denver, currently building a shared services center in the city of Brno (31st Rank). Driving such investment was the "city's suitable conditions for doing business" – which included the supply of F&A talent from the city and nearby locations and CzechInvest's support for the investment. This investment is projected to employ 100 people by the end of 2013.

Kraków, the top city of the region, maintains its competitiveness through its skilled labor force, churning out 36,000 graduates annually. Coupled with quality infrastructure and government support, Kraków has gained the confidence of service providers already established in the city. One example is Shell's acknowledgment of the city's capabilities – establishing a shared service center in the city. With 1,500 employees, Shell's shared services center in the

The 2012 Top 100 Outsourcing Destinations

| Country | City | 2012 Overall Rank | Movement from last year | Country | City | 2012 Overall Rank | Movement from last year |
|-----------------------------|-----------------|-------------------|-------------------------|------------------------|--------------------|-------------------|-------------------------|
| East-Central Europe: | | | | India | Thiruvananthapuram | 66 | ↑1 |
| Ireland | Dublin | 8 | ↓1 | India | Ahmedabad | 68 | ↑41 |
| Poland | Kraków | 11 | 0 | Latin America: | | | |
| Czech Republic | Prague | 20 | ↑2 | Brazil | São Paulo | 13 | ↑2 |
| Hungary | Budapest | 27 | 0 | Argentina | Buenos Aires | 15 | ↓2 |
| Czech Republic | Brno | 31 | ↑3 | Costa Rica | San José | 18 | ↑7 |
| Russia | St. Petersburg | 33 | 0 | Chile | Santiago | 22 | ↑2 |
| Poland | Warsaw | 38 | 0 | Brazil | Curitiba | 23 | ↓4 |
| Romania | Bucharest | 44 | ↓1 | Brazil | Rio de Janeiro | 30 | 0 |
| Russia | Moscow | 46 | 0 | Mexico | Mexico City | 39 | ↓3 |
| Slovakia | Bratislava | 50 | ↓1 | Mexico | Monterrey | 41 | ↑1 |
| Bulgaria | Sofia | 51 | 0 | Brazil | Brasília | 42 | ↑2 |
| Estonia | Tallinn | 52 | 0 | Uruguay | Montevideo | 43 | ↑7 |
| Slovenia | Ljubljana | 54 | 0 | Mexico | Guadalajara | 47 | ↑1 |
| Ukraine | Kyiv | 56 | 0 | Colombia | Bogotá | 55 | ↑9 |
| Russia | Nizhny Novgorod | 65 | ↓1 | Colombia | Medellín | 60 | ↑8 |
| Poland | Wrocław | 78 | ↑6 | Peru | Lima | 64 | ↑2 |
| Ukraine | Lviv | 91 | – | Argentina | Córdoba | 72 | ↓1 |
| Russia | Novosibirsk | 93 | ↑4 | Brazil | Recife | 75 | 0 |
| Serbia | Belgrade | 95 | 0 | Chile | Valparaíso | 82 | ↑7 |
| Romania | Cluj-Napoca | 96 | – | Colombia | Bucaramanga | 85 | ↓3 |
| Belarus | Minsk | 99 | – | Paraguay | Asunción | 88 | ↓5 |
| Croatia | Zagreb | 100 | – | Brazil | Campinas | 90 | ↑6 |
| South Asia: | | | | Colombia | Cali | 98 | – |
| India | Bangalore | 1 | 0 | SouthEast Asia: | | | |
| India | Mumbai | 2 | 0 | Philippines | Manila NCR | 4 | 0 |
| India | Delhi NCR | 3 | 0 | Philippines | Cebu | 9 | 0 |
| India | Chennai | 5 | 0 | Vietnam | Ho Chi Minh | 17 | ↓1 |
| India | Hyderabad | 6 | 0 | Vietnam | Hanoi | 21 | 0 |
| India | Pune | 7 | ↑1 | Malaysia | Kuala Lumpur | 28 | ↑3 |
| Sri Lanka | Colombo | 19 | ↑1 | Singapore | Singapore | 35 | ↑4 |
| India | Chandigarh | 24 | ↑2 | Indonesia | Jakarta | 62 | 0 |
| India | Kolkata | 25 | ↓2 | Philippines | Davao | 69 | 0 |
| India | Coimbatore | 29 | ↑3 | Malaysia | Penang | 77 | ↑2 |
| India | Jaipur | 37 | ↑4 | Philippines | Santa Rosa, Laguna | 86 | ↑2 |
| India | Bhubaneswar | 53 | ↑5 | Thailand | Bangkok | 87 | ↓10 |
| | | | | Philippines | Iloilo | 92 | ↑6 |

city delivers F&A, HR, and Customer Support services.

Government and private industry support is also robust in the region. This is seen mainly in the presence of outsourcing organizations and related institutional bodies that serve to aid in setting industry direction and growth. Government incentives and support come in the form of Free Economic Zones or Special Economic Zones, providing 0% tax rates and tax holidays, benefiting investor companies. For example, more than half of 50 multinational companies in Hungary have already established in its industrial parks.

However, these positive developments have somewhat been hampered by the ongoing financial crisis in the Eurozone, presenting significant challenges towards industry growth in the region. A slow-down of Western Europe's economies will have a ripple effect on the competitiveness of Eastern Europe, since the former is a major trading partner of Eastern Europe, and as Western Europe is a major client region for Eastern European Service providers. This may spur detrimental perception on the stability of Eastern Europe's overall business environment, and consequently its outsourcing ecosystem.

As such, segmented challenges in each country occur. For instance, Russia is trying to capture its own domestic market and vie for a share in the global ITO market; the country is struggling to enhance its data privacy and security measures. Such challenges directly resonate to the overall ITO climate in Russia, deterring service providers to locate in the country. Bulgaria also faces social issues, which may become detrimental in maintaining attractiveness for possible service providers.

Future Outlook

The Tholons 2012 Top 100 Outsourcing Destinations report for this year presents lead countries in Europe as well as those which need to use better strategies to catch up with other locations in the list. Lead countries such as Poland and the Czech Republic will become instrumental in leading the overall industry growth for Eastern Europe. With the Czech Republic's Prague and Brno continually moving up the ranks, intensified efforts in attracting more locators within these cities are needed. On the other hand, the position of Kraków may face stiffer competition especially from Chinese cities like Beijing (11th) and Dalian (14th) which are also proving capabilities for outsourcing. However, the city of Wrocław is a notably improving location for services outsourcing, given its big movement in the rankings.

Smaller players like Estonia, Serbia and Croatia are seen to face competition from the region as well as from other global locations. These countries' inclusion in this year's list marks a continual pursuit in developing a strong outsourcing industry for the whole re-

gion. Effective identification of unique value propositions and selling points is needed for these countries to spur upward movement in the rankings.

The current Eurozone crisis may present itself as a bane, and the challenge for Eastern Europe lies in how the region can weather through this period of uncertainty. As expected cost pressures are bound to shift the decision-making of Western European clients, Eastern Europe should leverage its strengths in reaping the benefits while satisfying the client needs through quality services. Nevertheless, if the traditional market may seem reclusive for outsourcing, Eastern Europe should devise alternatives to penetrate other client markets beyond Western Europe, especially those which require higher value ITO and KPO services.

Thus, tactful strategic planning would be the operative move for Eastern Europe, developing its IT-BPO industry in this time of eco-

nomics uncertainty. It highlights the need for the region to deliberately identify which service providers and client markets to target while in the midst of crisis. Eastern Europe may also look into attracting Indian Pure Plays to enter the market in order to widen their service delivery portfolio.

As the global IT - BPO industry escalates to higher value services, Eastern Europe has already established the necessary precursors to maximize the gains in complex services. Eastern Europe produces highly skilled talent, continually provides supporting physical and IT infrastructures, and consistently enhancing governmental support for the industry. In the coming years, the most considerable challenges for the region will be seen in how it can prudently and proactively navigate through Europe's current fiscal crisis, while at the same time, maintain developmental gains of the region's services outsourcing sector. ■

Human assets key to attracting services

The old adage that "people are our most important asset" seems trite. Yet the key factor in decisions to locate outsourcing and shared services centres usually hinges on an ample supply of well-educated labor at a cost at least 50% below western Europe or North America. Poland's young demographics – a population bulge around the 20-32 year old group – combined with strong academic institutions is proving an attractive draw for the world's top companies looking to both reduce costs and find process efficiencies.

While Poland is no India, the country is churning out an annual 400,000+ graduates from its universities, formidable numbers on a European scale. And the country's strengths in IT technologies, languages and mathematics just so happens to fit well with the 21st century's corporate needs. The graduates most frequently employed in SSC, BPO/ITO and R&D centres majored in either economics and administration, information technology as well as engineering and technical majors.

According to the latest data published by the Polish Central Statistical Office (GUS), in the years 2008-2010 the average number of students every year in Polish universities and colleges was approximately 1.9 million.

Graduates of these three groups of majors constituted, in the years 2008-2010, on average 34% of all graduates of Polish universities. We can see a clear dominance by Warsaw with respect to the number of economics graduates; however, in the case of information technology Łódź is in first place, whilst the largest number of technical studies graduates can be found in Kraków.

As the number of countries to which services are provided increases, so the demand

for people who speak languages other than English grows as well. Employees for whom the demand is highest are those who speak Nordic languages (Danish, Swedish and Norwegian) and Dutch. Polish universities are able to provide properly qualified employees in this area as well – language department graduates. In 2011 more than 30,500 people studied in the language departments of state universities in the eight previously mentioned cities (major centres of the business services sector in Poland).

We can also see a certain regional specialisation with respect to philology. The largest number of students of Dutch and German study in Wrocław, whilst for Scandinavian it is in Gdańsk. Slavic studies are most popular in Kraków while those people who want to study oriental languages such as Vietnamese or Thai usually choose Poznań. The level of knowledge of foreign languages in Poland is very high: over 90% of students declare that they speak English, 43% – German, over 13% – Russian and nearly 10% – French.

As Poland's outsourcing sector starts to mature and evolve, business service centres are focusing on sustainable, challenging job opportunities for the country's labor force. Cities, such as Wrocław and Kraków, that lead in the services sectors are vying for higher value-added jobs, KPO and research centres, and global financial firms that are keen to locate analytical and more advanced financial services. They are "moving up the food chain", while smaller cities that are new to the sector, such as Kielce and Lublin, are keen to take on jobs such as call centres and relatively simple business processes, as the first step in their development in the business services sectors. ■

Ranking: Poland's Top Universities

| Rank | University | Rank Factor | Prestige (25%) | Innovativeness (5%) | Research Potential (15%) | Research Efficiency (30%) | Study conditions (10%) | Internationalization (15%) |
|------|---|-------------|----------------|---------------------|--------------------------|---------------------------|------------------------|----------------------------|
| 1 | Uniwersytet Jagielloński | 100 | 95.92 | 65.47 | 99.40 | 99.98 | 85.18 | 76.58 |
| 2 | Uniwersytet Warszawski | 97.71 | 100 | 70.61 | 100 | 77.02 | 76.02 | 99.60 |
| 3 | Uniwersytet im. Adama Mickiewicza w Poznaniu | 77.55 | 60.32 | 66.88 | 90.04 | 64.42 | 72.70 | 90.61 |
| 4 | Politechnika Warszawska | 76.58 | 66.41 | 85.36 | 79.01 | 68.75 | 61.20 | 76.09 |
| 5 | Politechnika Wrocławska | 72.66 | 57.87 | 100 | 77.30 | 63.37 | 53.86 | 80.60 |
| 6 | Akademia Górniczo-Hutnicza im. Stanisława Staszica w Krakowie | 69.22 | 61.05 | 91.98 | 81.29 | 67.17 | 54.16 | 38.82 |
| 7 | Uniwersytet Wrocławski | 61.99 | 46.62 | 24.49 | 84.61 | 63.40 | 62.38 | 44.93 |
| 8 | Politechnika Łódzka | 60.39 | 37.97 | 92.11 | 69.24 | 52.27 | 54.15 | 74.95 |
| 9 | Uniwersytet Mikołaja Kopernika w Toruniu | 60.32 | 37.48 | 53.63 | 78.76 | 79.92 | 60.52 | 19.58 |
| 10 | Uniwersytet Medyczny im. Karola Marcinkowskiego w Poznaniu | 59.19 | 28.74 | 27.15 | 73.84 | 70.97 | 76.79 | 54.46 |
| 11 | Akademia Leona Koźmińskiego w Warszawie | 58.98 | 38.32 | 26.76 | 77.38 | 44.27 | 47.49 | 100.00 |
| 12 | Szkoła Główna Handlowa w Warszawie | 58.45 | 57.59 | 10.60 | 76.29 | 35.99 | 57.27 | 67.36 |
| 13 | Uniwersytet Medyczny w Łodzi | 58.11 | 29.81 | 31.95 | 70.88 | 76.76 | 91.27 | 23.99 |
| 14 | Warszawski Uniwersytet Medyczny | 56.80 | 36.95 | 31.10 | 57.29 | 71.13 | 74.72 | 38.71 |
| 15 | Uniwersytet Gdański | 56.71 | 32.51 | 50.24 | 75.16 | 67.13 | 62.54 | 35.04 |
| 16 | Politechnika Śląska w Gliwicach | 55.67 | 45.91 | 73.38 | 66.68 | 53.29 | 54.56 | 30.65 |
| 17 | Uniwersytet Medyczny w Białymstoku | 55.33 | 25.24 | 6.70 | 78.30 | 79.46 | 78.11 | 19.83 |
| 18 | Gdański Uniwersytet Medyczny | 54.53 | 21.83 | 23.32 | 71.48 | 68.48 | 86.64 | 39.59 |
| 19 | Uniwersytet Śląski w Katowicach | 54.13 | 30.13 | 61.98 | 80.35 | 63.08 | 58.54 | 21.84 |
| 20 | Politechnika Gdańska | 53.97 | 33.93 | 63.83 | 70.66 | 60.90 | 44.20 | 38.23 |
| 21 | Politechnika Poznańska | 53.81 | 45.62 | 78.46 | 66.34 | 49.82 | 49.33 | 27.10 |
| 22 | Akademia Medyczna im. Piastów Śląskich we Wrocławiu | 53.80 | 32.71 | 37.96 | 57.66 | 55.88 | 99.96 | 35.34 |
| 23 | Uniwersytet Ekonomiczny w Poznaniu | 51.96 | 43.76 | 27.50 | 74.54 | 44.86 | 45.96 | 40.11 |
| 24 | Uniwersytet Łódzki | 51.92 | 33.00 | 48.31 | 76.15 | 45.74 | 57.46 | 44.83 |
| 25 | Szkoła Główna Gospodarstwa Wiejskiego w Warszawie | 50.77 | 42.80 | 10.20 | 64.45 | 53.48 | 55.83 | 29.38 |
| 26 | Uniwersytet Warmińsko-Mazurski w Olsztynie | 50.73 | 36.50 | 61.74 | 65.27 | 45.38 | 56.29 | 38.19 |
| 27 | Śląski Uniwersytet Medyczny w Katowicach | 50.47 | 14.99 | 8.29 | 65.95 | 82.70 | 75.08 | 20.38 |
| 28 | Katolicki Uniwersytet Lubelski Jana Pawła II | 50.27 | 32.77 | 26.94 | 69.46 | 58.13 | 60.76 | 23.80 |
| 29 | Uniwersytet Przyrodniczy we Wrocławiu | 48.77 | 20.20 | 50.94 | 68.59 | 71.98 | 53.42 | 12.69 |
| 30 | Uniwersytet Medyczny w Lublinie | 48.76 | 11.46 | 18.61 | 62.42 | 64.09 | 80.88 | 49.19 |
| 31 | Uniwersytet Marii Curie-Skłodowskiej w Lublinie | 47.83 | 33.41 | 49.86 | 65.42 | 52.32 | 62.25 | 11.24 |
| 32 | Pomorski Uniwersytet Medyczny w Szczecinie | 46.08 | 3.00 | 22.50 | 56.44 | 74.70 | 79.42 | 36.39 |
| 33 | Uniwersytet Rolniczy im. Hugona Kołłątaja w Krakowie | 44.68 | 30.19 | 21.50 | 65.21 | 58.23 | 43.68 | 9.83 |
| 34 | Uniwersytet Przyrodniczy w Poznaniu | 44.52 | 33.55 | 23.93 | 62.22 | 53.16 | 47.96 | 10.39 |
| 35 | Uniwersytet Ekonomiczny we Wrocławiu | 43.75 | 34.46 | 35.98 | 69.09 | 31.68 | 42.71 | 35.24 |
| 36 | Uniwersytet Ekonomiczny w Krakowie | 41.87 | 37.28 | 10.93 | 65.06 | 31.12 | 39.29 | 33.79 |
| 37 | Wojskowa Akademia Techniczna im. Jarosława Dąbrowskiego w Warszawie | 40.44 | 25.17 | 10.04 | 64.52 | 52.03 | 50.66 | 3.81 |
| 38 | Uniwersytet Papieski Jana Pawła II w Krakowie | 40.39 | 2.35 | 2.16 | 70.62 | 75.54 | 52.58 | 5.24 |
| 39 | Zachodniopomorski Uniwersytet Technologiczny w Szczecinie | 38.42 | 9.85 | 59.01 | 60.47 | 51.04 | 58.37 | 7.75 |
| 40 | Politechnika Krakowska im. Tadeusza Kościuszki | 38.22 | 28.80 | 40.07 | 56.40 | 30.43 | 48.44 | 21.91 |
| 41 | Uniwersytet Kardynała Stefana Wyszyńskiego w Warszawie | 37.43 | 21.42 | 0.09 | 67.13 | 48.70 | 38.39 | 7.30 |
| 42 | Uniwersytet Ekonomiczny w Katowicach | 35.45 | 28.86 | 9.41 | 65.73 | 22.70 | 27.07 | 33.10 |
| 43 | Polsko-Japońska Wyższa Szkoła Technik Komputerowych w Warszawie | 35.39 | 17.95 | 15.47 | 77.51 | 31.19 | 37.87 | 16.34 |
| 44 | Uniwersytet Opolski | 35.36 | 15.78 | 21.37 | 62.65 | 43.71 | 39.01 | 12.56 |
| 45 | Politechnika Częstochowska | 35.20 | 16.75 | 35.38 | 55.94 | 42.14 | 41.37 | 13.52 |
| 46 | Uniwersytet w Białymstoku | 34.50 | 14.31 | 44.31 | 52.34 | 41.69 | 39.12 | 17.86 |
| 46 | Uniwersytet Pedagogiczny im. Komisji Edukacji Narodowej w Krakowie | 34.50 | 15.85 | 23.55 | 50.91 | 46.18 | 41.42 | 13.74 |
| 48 | Uniwersytet Szczeciński | 34.34 | 19.61 | 40.05 | 56.65 | 27.86 | 46.29 | 22.20 |
| 49 | Politechnika Opolska | 34.19 | 12.13 | 38.23 | 60.17 | 35.82 | 43.94 | 21.19 |
| 50 | Politechnika Białostocka | 34.07 | 20.50 | 38.23 | 49.25 | 32.82 | 46.42 | 18.54 |
| 51 | Politechnika Rzeszowska im. Ignacego Łukasiewicza | 32.58 | 18.43 | 51.74 | 51.24 | 36.88 | 31.93 | 7.60 |
| 52 | Politechnika Lubelska | 32.38 | 7.95 | 52.11 | 50.23 | 41.56 | 37.43 | 18.91 |

| Rank | University | Rank Factor | Prestige (25%) | Innovativeness (5%) | Research Potential (15%) | Research Efficiency (30%) | Study conditions (10%) | Internationalization (15%) |
|------|--|-------------|----------------|---------------------|--------------------------|---------------------------|------------------------|----------------------------|
| 53 | Politechnika Świętokrzyska w Kielcach | 31.66 | 15.21 | 35.79 | 51.08 | 40.73 | 32.40 | 7.24 |
| 54 | Uniwersytet Rzeszowski | 31.60 | 15.14 | 48.55 | 41.62 | 34.14 | 45.26 | 17.53 |
| 55 | Szkoła Wyższa Psychologii Społecznej w Warszawie | 31.47 | 17.37 | 15.13 | 64.04 | 26.29 | 29.86 | 22.55 |
| 56 | Akademia Obrony Narodowej w Warszawie | 30.94 | 3.26 | 0.00 | 50.39 | 62.63 | 30.81 | 3.63 |
| 57 | Uniwersytet Jana Kochanowskiego w Kielcach | 30.71 | 14.72 | 37.90 | 48.94 | 35.15 | 36.10 | 11.75 |
| 58 | Uniwersytet Zielonogórski | 30.21 | 9.83 | 19.31 | 53.46 | 37.47 | 48.96 | 7.25 |
| 59 | Uniwersytet Technologiczno-Przyrodniczy im. J. i J. Śniadeckich w Bydgoszczy | 29.17 | 8.54 | 44.73 | 56.06 | 29.10 | 48.79 | 6.05 |
| 60 | Collegium Civitas w Warszawie | 28.76 | 1.59 | 14.88 | 23.49 | 46.81 | 35.03 | 48.46 |
| 61 | Uniwersytet Kazimierza Wielkiego w Bydgoszczy | 28.52 | 17.81 | 26.72 | 47.91 | 28.45 | 36.99 | 6.96 |
| 62 | Akademia Wychowania Fizycznego we Wrocławiu | 28.44 | 2.46 | 15.25 | 51.99 | 37.82 | 50.27 | 13.86 |
| 63 | Społeczna Akademia Nauk (dawna Społeczna Wyższa Szkoła Przedsiębiorczości i Zarządzania w Łodzi) | 27.13 | 7.84 | 28.79 | 40.58 | 24.50 | 33.75 | 39.36 |
| 64 | Politechnika Koszalińska | 27.00 | 10.67 | 32.57 | 54.92 | 26.14 | 32.23 | 9.83 |
| 65 | Akademia Humanistyczna im. Aleksandra Gieysztor w Pułtusku | 26.40 | 2.96 | 12.82 | 63.50 | 28.06 | 41.77 | 9.70 |
| 66 | Akademia Wychowania Fizycznego im. Bronisława Czecha w Krakowie | 26.13 | 3.66 | 2.91 | 55.74 | 30.98 | 49.46 | 8.55 |
| 67 | Akademia Pedagogiki Specjalnej im. Marii Grzegorzewskiej w Warszawie | 25.92 | 9.13 | 2.56 | 53.30 | 36.42 | 27.00 | 3.32 |
| 68 | Akademia Techniczno-Humanistyczna w Bielsku-Białej | 25.19 | 9.92 | 26.21 | 41.07 | 28.41 | 34.49 | 12.70 |
| 69 | Akademia Wychowania Fizycznego Józefa Piłsudskiego w Warszawie | 25.15 | 7.35 | 10.41 | 40.17 | 28.69 | 45.59 | 17.16 |
| 70 | Akademia Wychowania Fizycznego im. Eugeniusza Piaseckiego w Poznaniu | 25.12 | 4.53 | 11.53 | 48.24 | 23.08 | 46.40 | 23.27 |
| 71 | Politechnika Radomska im. Kazimierza Pułaskiego | 24.83 | 11.37 | 30.72 | 50.29 | 19.77 | 42.77 | 3.94 |
| 72 | Uniwersytet Przyrodniczo-Humanistyczny w Siedlcach | 24.72 | 11.12 | 10.19 | 44.75 | 24.10 | 43.81 | 9.65 |
| 73 | Uczelnia Łazarskiego w Warszawie | 23.86 | 7.46 | 27.07 | 17.48 | 15.11 | 25.33 | 71.78 |
| 74 | Akademia Finansów w Warszawie | 23.67 | 11.54 | 6.28 | 47.31 | 18.53 | 34.61 | 17.17 |
| 75 | Akademia im. Jana Długosza w Częstochowie | 23.41 | 12.52 | 16.38 | 49.38 | 17.09 | 41.03 | 4.42 |
| 76 | Dolnośląska Szkoła Wyższa we Wrocławiu | 22.69 | 7.93 | 19.83 | 53.63 | 21.23 | 23.71 | 8.00 |
| 77 | Wyższa Szkoła Finansów i Zarządzania w Warszawie | 22.16 | 4.94 | 19.67 | 58.88 | 18.79 | 23.81 | 9.36 |
| 78 | Akademia Pomorska w Słupsku | 21.94 | 10.79 | 13.48 | 41.64 | 14.05 | 48.44 | 9.57 |
| 79 | Górnośląska Wyższa Szkoła Handlowa im. W. Korfańskiego w Katowicach | 21.02 | 3.80 | 26.98 | 34.13 | 21.12 | 32.03 | 22.02 |
| 80 | Krakowska Akademia im. A. Frycza Modrzewskiego | 20.71 | 10.74 | 20.92 | 46.70 | 10.60 | 27.53 | 13.71 |
| 81 | Akademia Morska w Gdyni | 19.58 | 7.43 | 21.70 | 41.58 | 16.65 | 30.04 | 5.94 |
| 82 | Wyższa Szkoła Filozoficzno-Pedagogiczna "Ignatianum" w Krakowie | 19.46 | 7.80 | 1.42 | 41.07 | 15.85 | 44.19 | 3.92 |
| 83 | Akademia Morska w Szczecinie | 18.59 | 8.78 | 9.92 | 38.62 | 10.76 | 34.34 | 12.42 |
| 84 | Akademia Humanistyczno-Ekonomiczna w Łodzi | 18.05 | 11.41 | 8.61 | 37.05 | 9.16 | 27.81 | 12.90 |
| 85 | Akademia Marynarki Wojennej im. Bohaterów Westerplatte w Gdyni | 17.62 | 4.17 | 16.27 | 42.59 | 16.52 | 29.85 | 0.81 |
| 86 | Akademia Wychowania Fizycznego i Sportu im. Jędrzeja Śniadeckiego w Gdańsku | 17.53 | 2.04 | 8.73 | 46.93 | 10.99 | 43.81 | 3.23 |
| 87 | Wyższa Szkoła Studiów Międzynarodowych w Łodzi | 17.24 | 1.90 | 19.30 | 43.24 | 0.03 | 37.23 | 28.38 |
| 88 | Wyższa Szkoła Zarządzania Marketingowego i Jęz. Obcych w Katowicach | 17.03 | 1.06 | 13.02 | 58.79 | 4.88 | 26.25 | 10.07 |

Ranking Rzeczypospolitej i portalu Perspektywy.pl - MAJ 2012

Students by voivodships:

| Voivodship | Public schools | Private schools | Total | Voivodship | Public schools | Private schools | Total |
|--------------|----------------|-----------------|-----------|---------------------|----------------|-----------------|---------|
| Polska | 1,218,416 | 518,196 | 1,736,612 | Świętokrzyskie | 24,452 | 17,845 | 42,297 |
| Łódzkie | 78,589 | 29,632 | 108,221 | Lubuskie | 22,128 | 1,725 | 23,853 |
| Mazowieckie | 180,939 | 126,129 | 307,068 | Wielkopolskie | 113,251 | 46,448 | 159,699 |
| Małopolskie | 164,593 | 43,520 | 208,113 | Zachodniopomorskie | 53,759 | 13,776 | 67,535 |
| Śląskie | 118,697 | 51,491 | 170,188 | Dolnośląskie | 114,870 | 45,337 | 160,207 |
| Lubelskie | 62,510 | 33,677 | 96,187 | Opolskie | 30,883 | 7,141 | 38,024 |
| Podkarpackie | 49,903 | 21,030 | 70,933 | Kujawsko-Pomorskie | 56,112 | 25,800 | 81,912 |
| Podlaskie | 38,158 | 12,715 | 50,873 | Pomorskie | 74,716 | 30,132 | 104,848 |
| | | | | Warmińsko-Mazurskie | 34,856 | 11,798 | 46,654 |

Office space options in Poland's major cities

Warsaw

In 2011, the capital city finished on a record high take-up level, while supply continued to fall, reaching only 45% of the 2008-2009's average levels (the pre-crisis boom period). This stemmed from the cautious approach of lenders which have tightened lending criteria. The area of Mokotów continued to draw major occupier interest (170,825 sq.m of take-up), with vacancy rates falling by nearly 50% from 2010's level, as did the city centre fringe (147,562 sq.m of take-up). With GDP growth forecast to fall, supply is in turn likely to slow, although compared with regional markets Warsaw is expected to show more resilience to any economic downturn.

Supply

Since the beginning of the 1990s, modern office space stock in Warsaw has been growing steadily and now totals 3,597,000 sq.m.

In 2011, 120,100 sq.m was delivered, accounting for 64% of 2010's total supply. After the record 2009, office supply has been shrinking - constrained by banks' tighter lending criteria and the uncertain economic situation in Europe. It is important to remember that for many projects obtaining financing for development remains a significant challenge. Large listed companies have sufficient funds to make more aggressive investment decisions, unlike small and medium-sized developers, which are dependent on debt finance and are more cautious about starting investment projects. The effect of this is that office supply is likely to shrink and the market to consolidate substantially. Pressure to secure pre-lets continues to increase. In 2011 pre-lets accounted for 121,877 sq.m - a nearly two-fold increase on the previous year's total. The largest completions included Ghelamco's

Mokotów Nova, Karimpol Polska's Equator II, Globe Trade Centre's phase IV of the Platinum Business Park and

Nieruchomości Powiśle's Hortus project. Some 180,000 sq.m of modern office space is scheduled for delivery by the end of 2012, and most of this is located outside the CBD.

Demand

Total gross take-up reached 573,853 sq.m in 2011, representing, contrary to expectations, a 4.5% increase on 2010. Absorption stood at more than 126,111 sq.m, of which around 62% (78,440 sq.m) was in non-central locations. Net take-up in the CBD reached 67,423 sq.m. More than 73% of leases were for spaces larger than 1,000 sq.m; around 33% were for spaces larger than 3,000 sq.m. Development and occupier activity continues to be focused on Mokotów, the city centre fringe and areas along Al. Jerozolimskie. In 2011 the proportion of pre-lets rose to 21% of gross take-up. Renewals and regearing continued to account for the substantial share of take-up (29%). However, this share was 6 percentage points lower than 2010's share, which highlights the trend of tenants relocating to new buildings offering favourable lease terms.

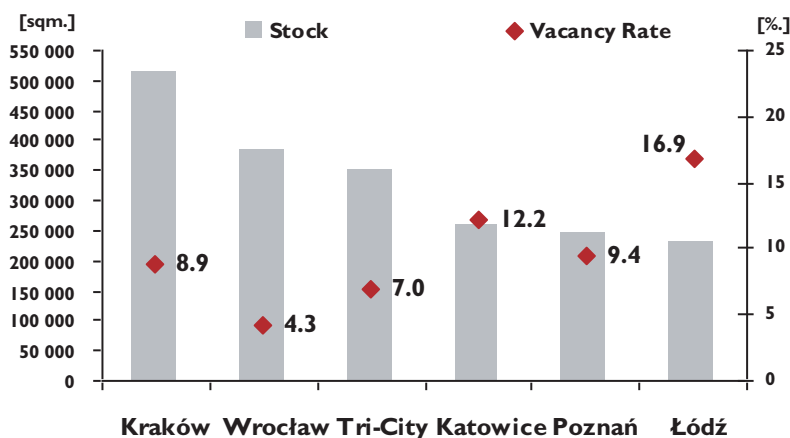
Vacancy rates

Supply constraints and growing demand were behind 2011's declining vacancy rates. At the end of the year, around 240,155 sq.m of office space was vacant, 6.68% of Warsaw's total stock. The highest vacancy rate was recorded on the right bank of Warsaw, 12.07%, and Ursynów, 11.9%. The completion of office space in the National Stadium and the exit of the Nova Praga office building's anchor tenant were the major factors affecting the vacancy growth in Praga district. Wilanów reported the lowest vacancy rate, 2.71% - over half of 2010's rate, reflecting the low supply of new space in that region. If take-up remains at the current level, average vacancy rates in Warsaw are likely to reach at least 6%.

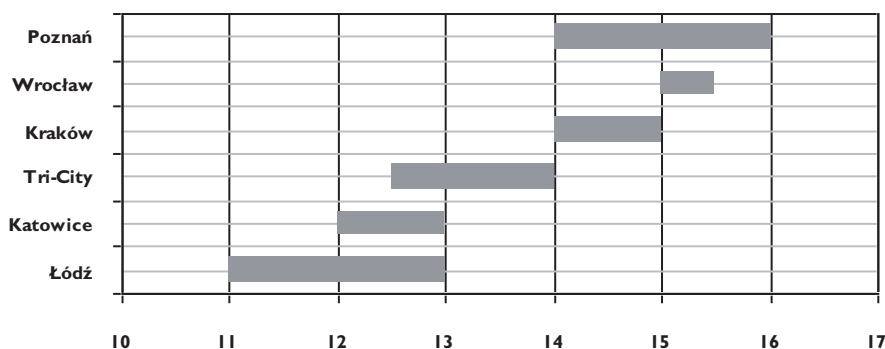
Rents

Despite favourable conditions for property owners, headline rents in 2011 remained flat across most locations. In prime central locations last year they were in the EUR 24.50-26.50/sq.m/month range, while in non-central locations they stood at EUR 15-16.50/sq.m/month. The development

Stock (sqm. and Vacancy Rate (%))



Prime Headline Rents (€ / sqm. / month)



Source all charts: Jones Lang LaSalle

continued on page 18

The Most Efficient BPO Center in Lodz

CROSS POINT
L O D Z

85%
I PHASE
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Śmigłego-Rydza 20
Lodz City Center

I PHASE:

Total office space
12 500 sqm

Offices to let
1 875 sqm

**The Best Office
Building 2011
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II PHASE:

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Typical floor
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Delivery IVQ 2013

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pipeline's ability to affect rents was evident as developers embarked on an aggressive pricing strategy to attract tenants and meet bank lending requirements for 30-40% of space to be pre-let. Effective rents, depending on the quality of the scheme, its size and visibility as well as the quality of the tenant, were therefore often lower by as much as 25%. Within the CBD average effective rents in prime locations stood at EUR 20-24/sq.m/month; in other locations rents were EUR 12-15/sq.m/month. At the same time, the high investment costs of new projects prevented landlords from reducing effective rents below EUR 11/sq.m/month. Tighter lending criteria, competition for tenants and projected fall in construction costs due to slowdown in infrastructure investments growth after EURO 2012 are likely to limit upward pressure on rents.

Kraków

Total prime stock in the second-largest office market after Warsaw stands at 539,235 sq.m. The key completions last year in the city included Green Office (phase I, building B and phase II – building A, a total of 11,300 sq.m) as well as Quattro Business Park (phase II, 12,000 sq.m) and Bonarka4Business (buildings A and B, a total of 15,935 sq.m). The third phase of Green Office, Enterprise Park and the refurbishment of Jasnogórska 11 are due for delivery soon. A relatively large number of developments are waiting on pre-lets. This includes the first phase of the Dutch company East West Development Office's Orange Office Park (11,230 sq.m) and Polish developer GD&K Group's Avia building (10,110 sq.m). Large deals such as Shell's lease of 16,100 sq.m in Krakow Business Park and SABRE's lease of 8,900 sq.m in Buma Square boosted 2011 take-up to 88,340 sq.m, down by 15% on 2010, which is not as high as expected. Vacancy rates at the end of 2011 were down by 2.4 percentage points on the corresponding period of 2010 and stood at 8.3%. Take-up correction did not alter landlords' expectations and headline rents remained at EUR 13-15/sq.m/month, with effective rents at EUR 11-13/sq.m/month.

Wrocław

Wrocław continues to strengthen its position as one of the fastest-growing office markets in Poland. Office stock totals 400,982 sq.m, of which 12,030 sq.m was delivered in 2011. Takeup reached 47,850 sq.m, powered by IBM's lease of 8,000 sq.m in Wojdyła Business Park and Credit Suisse's lease of 5,880 sq.m in the Grunwaldzki Center. As much as 91,784 sq.m is under construction, mainly in LC Corp's 23,954 sq.m Sky Tower;

Tenants become more confident in major office markets across Poland

| | Warsaw | Kraków | Wrocław | Tri-City | Katowice | Poznań | Łódź |
|-----------------------------------|-----------|---------|---------|----------|----------|---------|---------|
| Total Stock (sqm.) | 3,644,800 | 514,100 | 385,800 | 349,650 | 253,800 | 243,800 | 229,900 |
| Completions in Q1 2012 (sqm.) | 47,800 | 12,700 | 13,150 | 0 | 0 | 0 | 0 |
| Under Construction Q1 2012 (sqm.) | 582,000 | 55,850 | 107,000 | 95,300 | 44,500 | 64,400 | 38,500 |
| Vacancy Rate Q1 2012 | 7.3% | 8.9% | 4.3% | 7.0% | 12.2% | 9.4% | 16.9% |

* The arrows indicate the quarter-on-quarter change in vacancy level between Q4 and Q1

Skanska Property Poland's two phases, totalling 20,945 sq.m, of Green Towers; and 15,000 sq.m in Echo Investment's Aquarius Business House. The nation's lowest vacancy rate edged up by around 0.9 percentage point to 4.6%. This figure is, however, subject to change depending on the actual level of completions. Headline rents stood at EUR 12-14/sq.m/month, with effective rents slightly lower, owing mainly to new projects, at EUR 11-12.5/sq.m/month.

Tricity (Gdansk, Gdynia, Sopot)

Take-up in the Tricity market in 2011 reached 42,990 sq.m, of which new leases accounted for more than 78%, with pre-lets making up around 35%. The largest transactions were Energa's deal for 8,000 sq.m in TPS's Olivia Gate building and Young Digital Planet's lease of 4,398 sq.m in Allcon Park III. At the end of 2011 Tricity's stock amounted to 320,716 sq.m. This total included phases II and III of Allcon Park, which together contributed 15,116 sq.m, and Olivia Gate, within the Olivia Business Centre, which added 14,862 sq.m. Further phases of the Olivia Business Centre – Olivia Point and Olivia Tower, totaling 25,146 sq.m – as well as Neptun (Hines), Opera Office (Euro Styl), Alchemia (Torus), BCB Business Park (Bałtyckie Centrum Biznesu) and Garnizon Omega and Gamma (Grupa Inwestycyjna Hossa) are now under construction. Asking rents at year end were at EUR 13-15/sq.m/month, and effective rents were EUR 12-13/sq.m/month. Robust occupier demand shrunk the vacancy rate by nearly 7 percentage points to 10.4% from 2010's level.

Katowice

At the end of 2011, office space in Katowice amounted to 277,100 sq.m. Completions totalled 37,209 sq.m, of which 58% was taken up by new tenants. The largest lease deals were the renewal of Capgemini's lease of 5,700 sq.m in Altus and Tauron's and Ghelamco's deal for similar sized space in the Katowice Business Point office building. Other lettings included Ruch SA's deal for 2,500 sq.m and Grupa Żywiec's deal for 2,500 sq.m. These transactions brought down the vacancy rate by 6 percentage points from the fourth quarter 2010's level to 11.4%. Completions for 2012 will include the Opal Real Estate's Kostki office building (2,700 sq.m) and Górnośląski

Park Przemysłowy (7,350 sq.m). Further up the pipeline, Skanska Property Poland's Silesia Business Park I and Secus Property SA's Piaskowa Business Center have been granted building permits and will together expand supply by 20,622 sq.m. Rents were stable, yet a dearth of supply is likely to push them up slightly. Asking rents were at EUR 12-14/sq.m/month, and effective rents were EUR 11-12/sq.m/month.

Poznań

In 2011 Poznań's total office stock stood at 254,120 sq.m. The key projects completed were the 5,835 sq.m Malta Office Park III and the 4,170 sq.m Murawa Office Park. Under construction are Immobel's 5,500 sq.m Okraglak, Von der Heyden Group's 10,800 sq.m, Andersia Business Centre and, within the old city, the 1,784 sq.m Piątkowska Office Center. The largest leasing deal of 2011 was Allegro's deal for 14,600 sq.m in the Pixel building, which is under construction within the Klaster Grunwaldzka complex. Vacancy rates in the fourth quarter stood at 22,965 sq.m, equating to 10.2% of the city's total office stock. Take-up came to 48,686 sq.m and, as in most regional cities, new leases accounted for the largest share, 86% of transaction volume. Headline rents were flat at EUR 14-16/sq.m/month, with effective rents around EUR 12-14/sq.m/month.

Łódź

In 2011 take-up on Łódź's market reached 39,175 sq.m, of which 88% were new leases. The largest letting was Infosys BPO Poland's lease of 15,000 sq.m in Skanska Property Poland's Green Horizon, which is scheduled for delivery in October. Despite a few large letting transactions, the delivery of 8,730 sq.m in Park Biznesowy Teofilów (BZ WBK and BZ WBK TFI), pushed the vacancy rate up to 22%. Rossmann's 7,600 sq.m headquarters completed in the fourth quarter. At the end of last year, Łódź's total stock stood at 233,550 sq.m. The largest office due for completion this year is the 18,000 sq.m Green Horizon. Echo Investment's 19,000 sq.m Aurus is still in the development pipeline. Although Łódź's space generated healthy demand, asking rents were relatively low at EUR 14/sq.m/month, with effective rents at EUR 10-11/sq.m/month.

Source: Cushman&Wakefield



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Taxes, subsidies and other investment sweeteners

While most cities are usually keen to trumpet the importance of a plentiful and skilled labor force in landing new outsourcing investments, the deal sweeteners – financial incentives, tax-breaks, and subsidies – are often the key factors in a final decision.

Details of deals are usually hushed up, buried in confidentiality clauses, and city officials are reluctant to divulge the extent of incentives granted to major new outsourcing investments. Yet with major political and economic benefits flowing from big new deals – benefits such as hundreds or thousands of new jobs, higher personal income taxes, and a broadened corporate income tax base – city officials are quick to roll out the menu of incentives and subsidies available to new, large investors in the business services sector.

While a rather simple and small-value outsourcing investment deal can be negotiated directly with the city, larger investments are likely to benefit from the advice of the Big 4's on-the-ground consulting teams, other specialist consultants, or law firms. The range of incentives can be grouped as below.



- 1) European Union money.** Thanks to Poland's accession to the European Union, many cities are able to access direct and substantial grants or investment refunds for large projects in the services sector (i.e. creation of SSC/BPO, IT center, R&D center).
- 2) PAIZ.** The Polish Information and Foreign Investment Agency (PAIZ) has a range of financial incentives and subsidies that should be explored. In particular, PAIZ has substantial funds that it can access to promote direct investment in so-called

“Eastern” Poland, an area which includes the cities of Bialystok, Lublin, Kielce, Rzeszow and Olsztyn. These cities are not yet “on the map” in terms of outsourcing investment, but they aim to catch up quickly, with the help of substantial funding from the EU's Regional Development Programme. These cities are also increasingly keen to take jobs from the more successful Polish cities such as Krakow and Wroclaw, which are moving “up the value chain” targeting more sophisticated jobs such as KPO and analysis – and as such are less likely to court entry-level jobs, such as from call centers or simple processes. One of PAIZ's jobs is to promote BPO/Outsourcing investment in Eastern Poland, and the agency has funds available to further this objective.



- 3) Government grants.** The Polish government supports investors with grants for the creation of new jobs and investments in fixed assets. Government grants are designed for enterprises investing in the automotive, electronics, aviation, business services, research and biotechnology sectors. The support is granted based on an agreement between the Ministry of Economy and an interested investor and the resolution of the Council of Ministers permitting to transfer the funds. More details at: [HYPERLINK “http://www.paiz.gov.pl/strefa_inwestora/grant_rzadowy”](http://www.paiz.gov.pl/strefa_inwestora/grant_rzadowy) http://www.paiz.gov.pl/strefa_inwestora/grant_rzadowy
- 4) Exemption from real estate taxes:** Originators of new jobs can be totally or partially exempted from real estate tax. The local council has the right to exempt investors from real estate tax as one of public aid forms by way of a resolution. Pursuant to the Tax and Local Fees Act of 12 January 1991 (TLFA), local councils are authorised to establish tax rates and grant subjective exemptions from taxes

and fees specified in the TLFA. Of major importance for business services investors is the exemption from real estate tax. The real estate tax is charged on land and buildings.

It should be noted that tax exemption aid based on the local council resolution is “automatic aid” which means that the exemption is provided for in the law when an interested investor satisfies the criteria specified in the resolution. However, it is always required to submit an application for granting the aid in accordance with the instructions set out in the local council resolution. All investment expenditure incurred before the exemption is granted can be considered eligible costs.

5) Employment grants and employee-development subsidies:

Investors who satisfy specific criteria can apply for financial assistance from the Labour Fund. The amount of allocated assistance varies between employers and depends on the forms of cooperation with the Poviats Employment Agency. The most popular allocations include refunds of training costs, co-financing the costs of basic and additional working equipment and internship programmes. The range of activities eligible for financial support from the Labour Fund include:

- Refund of training costs - reimbursement of employer's costs for training employees.
- Reliefs for employers of people over the age of 50.
- Co-financing the costs of basic and additional working equipment - reimbursement of basic and additional working equipment costs for an unemployed person referred from the Poviats Employment Agency.
- Internships - hiring an unemployed person without an employment agreement with the employer.

The support is designed for employers who enable the unemployed to gain practical knowledge and skills by working in a company without having to enter into an employment agreement.

Eligibility criteria:

- unemployed persons up to the age of 25 (27 in the case of university graduates, within 12 months from the date shown in the diploma) - for 12 months,
- persons in a special situation on the labour market (Article 49 of the Employment Promotion and Labour Market

Institution Act of 20 April 2004).

Using Gdansk as a practical example, the Gdansk County Labor Office can offer grants as follows:

USD 6332/equipment for a workstation

USD 3165/training costs

USD 616/social allowances refund

Possibility to get trainee free of costs

The Gdansk Scholarship is a financial instrument designed for companies planning to have an operational unit in Gdansk. The programme has been organised with the aim of encouraging the creation of new jobs and employment opportunities for students who have to complete a range of necessary training when embarking on a professional career in a new company. Financial assistance granted under the programme can be used for covering the costs of additional student training and any travel, accommodation and other expenses. The maximum scholarship is PLN 30,000 per student and can be used within a period of 6 months. As soon as the training is completed, the student is required to work for the company for at least 12 months. So far, Gdansk Scholarships have been awarded to such companies as Axiom, Zensar, Lufthansa and Kainos.

"In 2010, we were awarded a financial scholarship by the Gdansk City Council. We sent three students to complete training in Belfast where they were able to learn about new programming technologies and work in design teams together with their Irish colleagues. For our students it was a prelude to an interesting career, while for our company it was an excellent way to give due attention to our most valuable employees. After they completed their internship training, we offered them employment corresponding to their university courses. Two of them are still working with us today and have been recently promoted." – firm Kainos

6) Special Economic Zones (SEZ):

The special economic zones were established initially to attract more manufacturing and production investment into Poland, but in recent years the Zones have become keen to attract business services investment as well. The SEZs are generally equipped with a full-range of technical infrastructure, and are exempt from income tax (personal/corporate income tax). The extent of tax exemption depends on the investment value or the number of created jobs; at least a 5-year history of business operations after the completion of the investment; the total extent of tax exemption may not exceed the limits following from EU regulations on regional aid; and minimum value of investment is EUR 100,000. Many technology parks have been set up within SEZs, to take advantage of the government incentives. ■

Manager's Profile

Lucyna Chwastowska

Tieto

Director, Devices R&D Eastern Europe

Operations in Poland

Tieto is the biggest supplier of IT services in Northern Europe. The company operates in nearly 30 countries and employs over 18000 people. In Poland we offer integration and consulting services to Polish telecom and banking sectors and we run significant operations related to product engineering (software creation)- namely R&D consulting and outsourcing for customers from network infrastructure, mobile devices, consumer electronics, automotive and industrial high tech segments. In Poland we employ 1200 employees, almost exclusively IT engineers. We are organized into two main centers of excellence - in Wroclaw and Szczecin, and we have a sales office in Warsaw.



How has your business changed?

We started from an acquisition of RTS Networks in Szczecin in 2006, a company with 160 employees and a strong portfolio of projects in R&D outsourcing for the telecom industry. A couple of months later we added a group of 140 engineers from former BenQ-Siemens site in Wroclaw. In product engineering solution, these two locations created an excellent core team, which we then nearly quadrupled. This success story and a noticeable growth of the Polish telecom industry made the corporation decide to enter the local market and set up local sales teams in other than product engineering divisions. In the meantime, the responsibilities in software creation area have grown significantly and now embrace full scope of operations - production, project management, delivery ownership and customer management. Tieto Poland is now seen in the corporate strategy as a main center of R&D excellence in Europe, one of the three centers globally (others are China and Philippines), supporting our customers on three

continents.

Advice for setting up in Poland

Good local management is essential. Over the last 20 years the local telecom market have developed a good supply of skilled managers, especially in places aspiring to be R&D outsourcing hubs, like Wroclaw or Krakow. In such locations you may also consider scanning local companies for potential partners - you don't need to do everything in-house. Another thing to remember are good relations with local authorities and universities. And last but not least - take advantage of local brains: bring your people as close as possible to where the added value is created - and let them act. There is surprisingly much creativity and flexibility in the way people do things around here.

Employees

Employees are our main asset, so as a company we keep a close eye on their careers, personal growth and well-being. We are running development programs with a main focus on young talents. As a socially responsible employer we not only concentrate on our own employees but also through internships, workshops, trainings, and learning programs we share our knowledge with students and young enthusiasts. Our employees have a chance to make use of a wide range of benefits. Starting from sport activities for people willing to be fit, through to fun-loving guys enjoying team events and playrooms, to far-sighted and thrifty men who appreciate investment funds. Great, friendly atmosphere appreciated by all our employees.

Positive surprises of operating in Poland and cost savings/efficiencies.

There are significant reductions in OPEX that we experience ourselves and that we offer directly to our customers. But equally important: placing R&D outsourcing in Poland gave us access to a large pool of talents, which often counts for more than just pure savings: when time to market is king, having truly unique competences combined with scalability bring the competitive advantage that our customers are looking for.

Role of grants

Governmental subsidy did not play a role when setting up operations in Poland, but did have a significant impact on the decision to grow it further. We have been using a governmental subsidy since 2008 and, naturally, will be more than happy to use it even more. ■

Manager's Profile

Martin Ring

BNY Mellon (Wroclaw)

Headquarters (global): New York

Managing Director

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Operations in Poland:

As part of BNY Mellon's efforts to optimise its infrastructure and to support its ongoing growth strategy, in March 2012 the company announced the creation of a new Global Delivery Centre (GDC) in Wroclaw.

This decision is in line with the company's aims of consolidating high quality operations service delivery to clients in a smaller number of global locations. Through this strategy the company is leveraging the new GDC's proximity to a skilled workforce in an economically attractive location and a preferred time zone. At the same time, it will allow us to consolidate some more common functions required to service our increasingly global client base.

Staff at the new Centre will work in highly skilled roles predominantly in the areas of Investment Accounting and Securities Transaction Processing.

How do you expect it to develop?

The new Centre will leverage our existing Wroclaw-based office, formerly operated by PNC Global Investment Servicing, which BNY Mellon acquired in July 2010. The office in Wroclaw currently employs just over 100 staff supporting Investment Services businesses and has capacity for up to 310.

Wroclaw becomes BNY Mellon's fifth Global Delivery Centre (GDC) – the others continue to be located in Pittsburgh, Manchester, Pune, and Chennai.

The designation of our Wroclaw location as a GDC underlines the continued importance of Continental Europe to our global strategy and represents a significant investment by the Company in supporting our future growth in the region.

Advice to other managers about setting up

Poland is a great place to do business, but it is very important to understand the legal, statutory and regulatory framework. Good taxation, accounting and legal guidance is essential when setting up a new business here.

The business support framework established in Wroclaw by the Lord Mayor, President Dutkiewicz, is excellent. The Wroclaw Agglomeration Development Agency (ARAW) are very pro-active and they have provided continual support to our business as we have been developing. The Polish Information and Foreign Investment Agency ("PAIIZ") are also very helpful and supportive.

The ABSL (Association of Business Service Leaders) has recently established a local chapter in Wroclaw and this is also a great



source of knowledge and expertise. BNY Mellon has certainly received a warm welcome from all of these agencies, organisations and individuals and this has proved very beneficial as we look to grow our business in Poland.

Employee issues

Highly educated and qualified staff from graduates to senior managers. Our culture is very important to us and we look to align our employees with those values, so technical competencies and 'soft' skills are of equal importance to us.

We recognise the high potential and willingness to learn among our staff, and these 'can do' qualities will be key as we seek to build our GDC. We also recognise that the labour market is competitive (in particular in our industry) and we believe we enjoy a strong advantage when it comes to partnership.

We build a partnership internally with our employees by fostering an environment that encourages 'accountability' around an individual's own development and career progression. Backed up by our commitment to equal opportunities and internal learning & development schemes, this provides our employees with opportunities to grow together with our company. Externally we build partnerships with our local commu-

nities through the provision of two days fully paid leave to each employee to perform voluntary community work, we also support staff fundraising efforts by matching their donations etc. Through our Community Partnership Giving Program, employees have been able to contribute in a meaningful way to a local orphanage for children with special needs.

Positive surprises – and critiques – of operating in Poland

We have a great team here in Wroclaw and we are very impressed by the high levels of dedication and enthusiasm displayed by our employees. Wroclaw is a major university city and so has the demographics we look for; the close proximity of other, neighbouring university cities also offers a deep pool of educated, talented and motivated graduates possessing excellent English and other foreign language skills.

Did subsidies from Polish authorities play a role in your decision to set up in Poland?

We are in discussions with the Polish government to secure a special purpose grant for employment in relation to the development of our Global Delivery Center. This is naturally an important factor to be considered along with the other advantages that Wroclaw and Poland have to offer. ■

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Axiom
Arla
Asseco
Bank BPH/G
Bayer
Compuware
Contact Center
Fines
First Data
General Elec
Geoban
Goyello
HK Finance&
IBM

Toruń

Itella Information

Mierzyno

Calling Poland
Sonion
TP

Sopot

Goyello

Poznań

arvato (Bertelsmann)
Bridgestone EBS
Business Consulting Center
Carlsberg ASC
Ciber
Contact Center
Dalkia Services
Deloitte BPO
Digital-Center
Duni European Financial Centre
External Services
Franklin Templeton
GlaxoSmithKline
Grace
Grant Thornton Frąckowiak

Grupa BCC External Services
Holicon Contact Center
HolidayCheck
IKEA SS
Intelligence
Itella Information
Jerónimo Martins
Kennametal Center Services
Kleffmann
Lorenz Snack
Magellan Software
MAN
McKinsey&Company SSC
Mentor Graphics
Microsoft

Open Text
Q-Partners
Randstad
Roche
Samsung
Sii IT outsourcing
Starter Truck Services
Talex
Telcordia Technologies
Unilever
W.R.Grace
Wikia
ZETO

Konin

arvato (Bertelsmann)

Piła

Phillips

Szczecin

Zielona Góra

ABD

Mierzyno

Gdynia

Sopot

Gdańsk

Tczew

Prus

Humax

Łódź

ABB
Accenture
ACS Solutions Poland/Xerox
AMG.net
Atos Origin
Bank Pekao SA
BNP Paribas Fujitsu Services
Bosch&Siemens
BSH
BSS — Business Support Solution
Cardif Services
CERI International
Citi Handlowy
CitiFinancial
Comarch
Contact Center
CWS-boco Polska

DHL Express
Dimar
Ericpol Telecom
Fujitsu Technology Solution
GE Power Controls
IBM
Indesit
Infosys BPO Poland
INTERsoft
LSI
MacoLab
Mbank&Multibank
Mellon
Mobica
Nordea
Nordea Operation Center
Nycomed/Takeda

Philips
Polkomtel
PTC
Randstad Payroll Solutions
Rule Financial
SAP
SouthWestern BPS Poland
T-Mobile
Tate&Lyle
Teleca
TomTom
TP
Transition Technologies
Unicredit
Virtual Viewing
Warta Insurance Group

Wrocław

Rawa Mazowiecka

Łódź

Wrocław

Atos
Becton Dickinson
BNY Mellon
Capgemini Software Solution Centre
Central Europe BPO
Credit Safe
Diehl Controls
Dolby
Ernst&Young
Fagor Mastercook
getsix
Geoban
Global e-Business Operations (HP)
Google
Hamilton Sundstrand
IBM Global Services
Ireva

KPIT Cummins
McKinsey&Company
Mphasis
Networks
Nokia Siemens Networks
Opera Software
PNC (PFPC)
QAD
Randstad Payroll Solutions
Remy International
Research & Engineering Center
Ruukki
Santander Consumer Bank
Siemens AG
Tieto Poland
UPS
Volvo
Wabco
Whirlpool
Wipro
Center of Excellence Credit Suisse

Opole

Call Center Inter Galactica
Capgemini
Future Processing
Opta data
PZU/PZU Życie
R.N.G.

Tarnowskie Góry

Sitel

Bytom

Contact Center Liberty

Gliwice

General Motors
Goyello
Ista Shared Services
Pregis

Tenneco
Vattenfall Business Services
Ista
Tauron

Ruda Śląska

Arteria/Gallup

Katowice

4EverNET
Archidoc
Arinso People Services
Arteria/Gallup
Asseco Poland
Asseco Systems
Bombardier
Capgemini BPO
Capgemini ITO
Comarch
Contact Center

CYCLAD
Deloitte BPO
DisplayLink
ENIRO Poland
Ericsson
Ernst&Young
Eton Park/Ruch
France Telecom
Gliwice
Grant Thornton Intl
Heineken/Grupa Żywiec

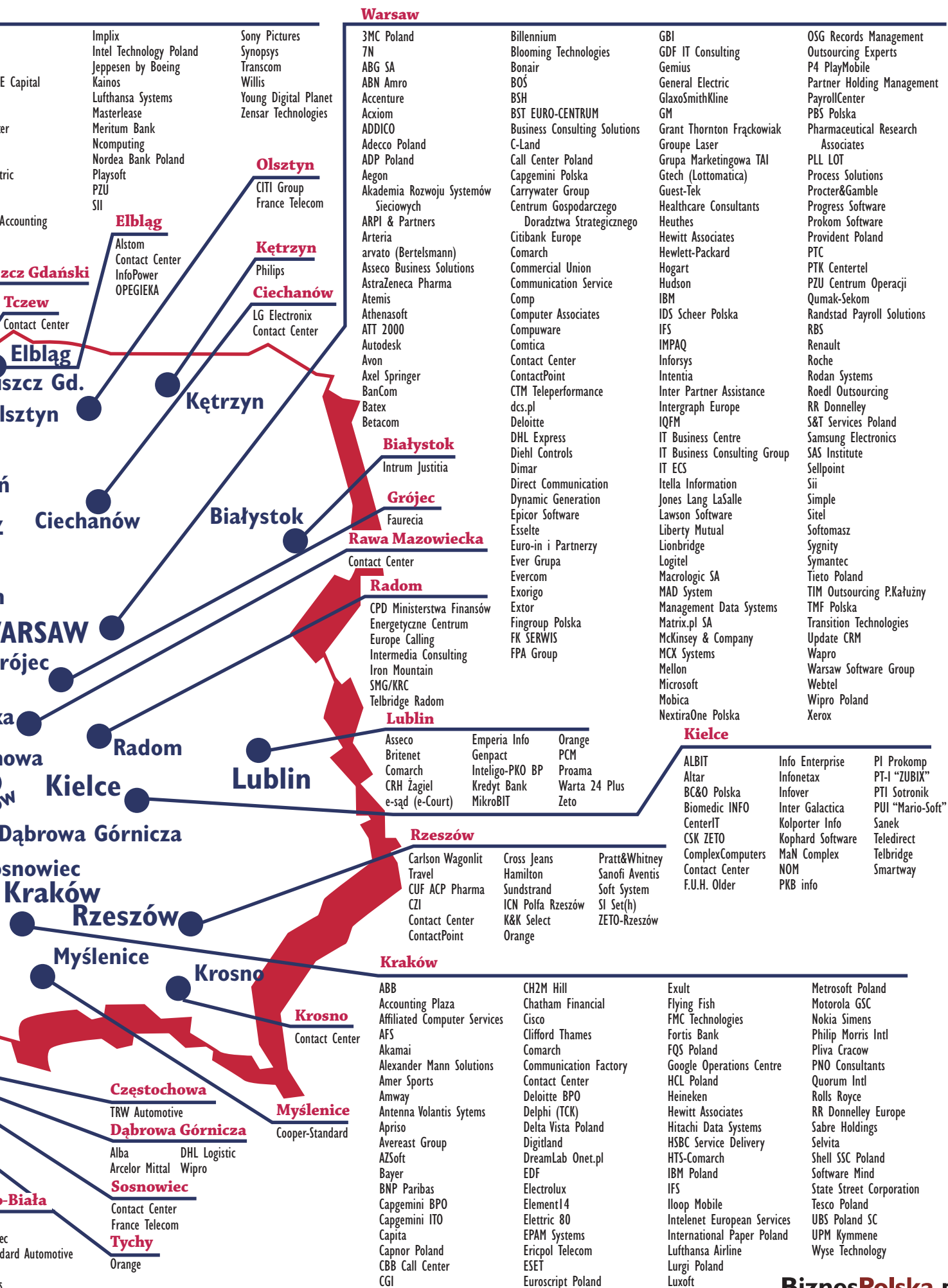
ING Services Poland
Ista
IT4Q
Katowicki Holding
Weglowy
Kroll Ontrack
Mentor Graphics
Neubloc
NorthgateArinso
OEX/Archidoc
Poczta Polska

Proximity
PwC
Rockwell Automation
Steria
Tauron
Timken
TP
Unilever
UPC
Vattenfall
Warta

Bielsko

Avio
Grupa Żywiec
Cooper-Stan
EnerSys
Fiat Services

Services Centers in Poland



BPO/SSC Companies in Poland

Bielsko-Biala

Avio

HQ of parent company: Poland
Services provided: SSC
Management in Poland: 33 813 40 12

Centrum Finansowo – Księgowe Grupy Żywiec S.A.

Number of Employees: 154
Services provided: SSC
Management in Poland: 33 826 20 00

Centrum Finansowo-Księgowe Żywiec Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 2007
Number of Employees: 140
Services provided: SSC – accounting, finance
Management in Poland: Krzysztof Bula, krzysztof.bula@grupazywiec.pl, 33 826 22 01; Agnieszka Pluszcz-Bernat, agnieszka.pluszcz-bernat@grupazwyec.pl, 33 826 22 01

Cooper-Standard Automotive Polska Sp. z o.o.

HQ of parent company: USA
Number of Employees: 60
Services provided: SSC
Management in Poland: 33 828 91 01

EnerSys Sp. z o.o.

Number of Employees: 100
Services provided: SSC – usługi księgowe i obsługa klienta EnerSys
Management in Poland: 33 822 53 81

Fiat Services Polska Sp. z o.o.

Services provided: SSC
Management in Poland: 33 813 21 00

Bydgoszcz

AGNAT Sp. z o.o.

Services provided: Call Center

Alcatel – Lucent Poland Sp. z o.o.

HQ of parent company: USA / France
Number of Employees: 700
Services provided: IT service desk, R&D
Management in Poland: Andrzej Dulka – President of the Board

Asseco Poland Sp. z o.o.

HQ of parent company: Poland
Services provided: IT

Astara

Atos Origin IT Services Sp. z o.o.

HQ of parent company: France
Year started in Poland: 2008
Number of Employees: 200
Services provided: IT service desk
Management in Poland: Dariusz Baran – President of the Board

Bank BPH S.A. – Centrum Korporacyjne

HQ of parent company: Poland
Services provided: Financial services

Bank Poczty S.A. – Centrum Operacyjne Sp. z o.o.

HQ of parent company: Poland
Services provided: Financial services
Management in Poland: Robert Ratajczak – President of the Board

Centrum Przetwarzania Dokumentów – Centralny Ośrodek Rozliczeniowy Poczty Polskiej

HQ of parent company: Poland
Services provided: Financial services

Centrum Wsparcia Biznesu Paweł Roman

Services provided: Call Center

Contact Center sp. z o.o.

HQ of parent company: France
Year started in Poland: 1999
Number of Employees: in Poland: 5915
Services provided: Telesales, sales support, databases, call centre, debt recovery, marketing research, office services, voice recordings, business consultancy, handling overflow traffic, contact centre virtualisation
Management in Poland: Zbigniew Biały – President of the Management Board

CTDP Sp. z o.o. & Co. Sp. k.

HQ of parent company: Poland
Services provided: Call center
Management in Poland: Krzysztof Sikora – Member of the Board
Wojciech Sikora – Member of the Board

Eniro Polska Sp. z o.o.

Services provided: Call Center

FPA Group Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 2010
Number of Employees: 70
Services provided: Financial services
Management in Poland: Radosław Osmólski – President of the Board

JP Morgan Poland Limited sp. z o.o.

HQ of parent company: USA
Year started in Poland: 2008
Services provided: Financial services
Management in Poland: Waldemar Jasiński – Vice President

Livingstone International (formerly JP Morgan Chase Polska sp. z o.o.)

Services provided: Finance

Makromedia Sp. z o.o.

Services provided: Call Center

Obsługa Klienta Biznesowego Paweł Cegielnik

Services provided: Call Center

Orange / TP S.A.

HQ of parent company: France
Services provided: Call Center

Sambora Aleksandra Kaźmierczak

Services provided: Call Center

Sunrise System Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 2011
Number of Employees: Goal: 150
Services provided: IT
Management in Poland: Janusz Bogaczyk – President of the Board

Telenova Polska

Services provided: Call Center

Teleplan Poland Sp. z o.o.

HQ of parent company: Holland
Year started in Poland: 2010
Number of Employees: 300
Services provided: IT
Management in Poland: Bob Jason – General Manager

Tm Service Roma Buko

Services provided: Call Center

Zespół Obsługi Klienta, Przedsiębiorstwo Informatyki ZETO Bydgoszcz S.A.

Services provided: Call Center

Dąbrowa Górnicza

Alba

HQ of parent company: Poland

Number of Employees: 50

Services provided: Finance, Accounting SSC

Arcelor Mittal

HQ of parent company: Poland
Number of Employees: 200-300
Services provided: SSC
Management in Poland: Abhijit Roy – CEO & BOD Chairman, 32 776 66 66

DHL Logistic

HQ of parent company: Poland
Number of Employees: More than 200
Services provided: Logistic Outsourcing

Wipro

HQ of parent company: Poland
Number of Employees: 140
Services provided: Finance, Accounting Outsourcing
Management in Poland: Ramesh Phillips – Member of the Board, Michał Szop – HR Manager

Gdańsk

Arla Global Financial Service Centre Sp. z o.o.

(Gdańsk)
HQ of parent company: Denmark
Year started in Poland: 2008
Number of Employees: 125
Services provided: Finance, corporate shared services
Management in Poland: Arne Sørensen, arne.sorensen@arlafoods.com

Nordea Bank Poland

(Gdańsk)
HQ of parent company: Scandinavia
Year started in Poland: 1991
Number of Employees: Over 500
Services provided: Finance/IT

Axiom

HQ of parent company: USA
Year started in Poland: 2007
Number of Employees: 120
Services provided: IT

Bank BPH/GE Capital

HQ of parent company: USA / Poland
Year started in Poland: 1997
Number of Employees: 2900
Services provided: Finance

Bayer

HQ of parent company: Germany
Management in Poland: Remigiusz Wojciechowski

Compuware

HQ of parent company: United States
Year started in Poland: 1998
Number of Employees: above 150
Services provided: IT

Contact Center sp. z o.o.

HQ of parent company: France
Year started in Poland: 1999
Number of Employees: 5915
Services provided: Telesales, sales support, databases, call centre
Management in Poland: Zbigniew Biały – President

Fineos

HQ of parent company: Ireland
Year started in Poland: 2009
Number of Employees: 22
Services provided: IT

First Data

HQ of parent company: USA
Year started in Poland: 2007
Number of Employees: 130
Services provided: finance

First Data Global Services Ltd

HQ of parent company: USA
 Year started in Poland: 2007
 Number of Employees: 130
 Services provided: Finance, SCM, IT, PM, HR
 Management in Poland: Krzysztof Luty, 58 763 67 00,
 krzysztof.luty@firstdata.com

General Electric**Geoban S.A. Spółka Akcyjna Oddział w Polsce****Goyello**

HQ of parent company: Netherlands
 Year started in Poland: 2006
 Number of Employees: 60
 Services provided: IT

HK Finance&Accounting

HQ of parent company: Poland
 Year started in Poland: 2005
 Number of Employees: no data
 Services provided: Finance and accounting

IBM

HQ of parent company: USA
 Year started in Poland: 2009
 Number of Employees: 20
 Services provided: Consulting, application services, IT

Implix

HQ of parent company: Poland
 Year started in Poland: 2007
 Number of Employees: 100
 Services provided: IT

Intel Technology Poland

HQ of parent company: USA
 Year started in Poland: 1998
 Number of Employees: 600
 Services provided: IT

Jeppesen by Boeing

HQ of parent company: USA
 Year started in Poland: 1998
 Number of Employees: 150
 Services provided: IT

Kainos

HQ of parent company: Ireland
 Year started in Poland: 2008
 Number of Employees: 50
 Services provided: IT

Lufthansa Systems

HQ of parent company: Germany
 Year started in Poland: 1998
 Number of Employees: 330
 Services provided: IT

Masterlease (Futura Leasing, Prime Car Management)

HQ of parent company: UK
 Year started in Poland: 2006
 Number of Employees: 180
 Services provided: Finance

Meritum Bank

HQ of parent company: Poland
 Year started in Poland: 2008
 Number of Employees: App. 500
 Services provided: Finance

Ncomputing

HQ of parent company: USA
 Year started in Poland: 2009
 Number of Employees: 50
 Services provided: IT

Playsoft

HQ of parent company: France
 Year started in Poland: 2009
 Number of Employees: 100
 Services provided: IT

Manager's Profile**Barbara Sek**

*Transcom WorldWide CMS
 Poland Ltd.
 Wrocław, Gdańsk, Olsztyn
 Headquarters (global):
 Luxembourg
 Area General Manager,
 Poland CMS
 barbara.sek@transcomcms.pl*

Operations in Poland:

Transcom Poland was established in 2003 and now operates out of three locations in Wrocław, Gdańsk and Olsztyn, with a total capacity of over 530 seats. Transcom CMS Poland with its seat in Wrocław offers credit management services and specialises in amicable and legal collection of retail mass portfolios of receivables, commissioned by clients from various sectors and having debtors in the territory of Poland.

How has your business changed?

Transcom started in Poland with providing customer management services (CRM) from its site in Olsztyn. After 4 years, in 2007 it added credit management services (CMS) to its portfolio. In the same year Transcom established a law firm to support clients with legal services and set up an office in Gdańsk to strengthen its position in CRM part of business. What's next? Based on our global experience it will be seeking new communication channels and supplying customer care through social media.

Advice to other managers about setting up

With nearly 40 million people and its geographical position, Poland is still an emerging country with a great potential for BPO service providers. For those who look for outsourcing destinations I would recommend that you familiarize yourself with Polish labour and education market and choose a city with strong universities that provide skills that are valued in business. Then, one should set priority orders (e.g. rent costs, infrastructure) and choose a location based on this. One can also take advantage of local advisers who provide all legal and operational background in Poland.

PZU

HQ of parent company: Poland
 Year started in Poland: 2010
 Number of Employees: 70
 Services provided: Insurances/finance

SII

HQ of parent company: France
 Year started in Poland: 2009

Employee issues

In Poland people are well-educated, open-minded, motivated to work and have many required skills, e.g. language and soft abilities. You receive this from your employees and in return, you should ensure a stable work environment and a possibility to develop. This builds strong relationship based on mutual benefits.

Positive surprises – and critiques – of operating in Poland:

Positive: talented young people including top managers, developed IT infrastructure, wide offer of office space, stable political and economic environment, constantly improved air and road transport. Negative: relatively frequent changes in legal regulations, social costs related to employment above the average, not cheap modern office space in big cities.

Polish authorities are interested in attracting foreign capital but their awareness of how to create good investment conditions is below the average. As a developing country, Poland needs time to be well-prepared in this matter but still, I incline to believe that setting up here has many positives regardless of poor incentives from authorities. ■

Number of Employees: 80
 Services provided: IT

Synopsis

HQ of parent company: USA
 Year started in Poland: 2010
 Number of Employees: 100
 Services provided: IT

BPO/SSC Companies in Poland

Transcom

HQ of parent company: Sweden
Year started in Poland: 2007
Number of Employees: 300
Services provided: Contact center

Willis

HQ of parent company: UK
Year started in Poland: 2010
Number of Employees: App. 10 currently
Services provided: Finance

Young Digital Planet

HQ of parent company: Finland
Year started in Poland: 1990
Number of Employees: 500
Services provided: IT, R&D

Zensar Technologies

HQ of parent company: India
Year started in Poland: 2007
Number of Employees: 40
Services provided: IT

Asseco

(Tri-City)
Number of Employees: 1000
Services provided: IT

Sony Pictures Global Business Services sp. z o.o.

(Tri-City)
HQ of parent company: USA
Year started in Poland: 2009
Number of Employees: Over 100
Services provided: SSC – Finance
Management in Poland: Michał Gryglewski – Managing Director, michal_gryglewski@spe.sony.com; Jarek Zboralski – HR Director, jarek_zboralski@spe.sony.com

Gdynia

Asseco Poland SA

BEST

HQ of parent company: Poland
Year started in Poland: 1994
Number of Employees: App. 450 (in Gdynia and Elbląg)
Services provided: Outsourcing of dept collection

DNV Polska

Geoban S.A. SA Oddział w Polsce

HQ of parent company: Spain
Year started in Poland: 2008
Number of Employees: 650
Services provided: Banking operations management
Management in Poland: Raimo Kesti, rkesti@geoban.es

Trojmiasto:

Bayer: As a direct outcome of an internal F & A reorganization, Bayer has opened a new financial-accounting center in Tri-City. In an effort to increase productivity and increase the competitiveness of its accounting services, processes will be grouped together in its Finance & Accounting Shared Services Center, supporting businesses in central and eastern Europe, and focused initially on standardized accounting processes. Bayer will hire more than 200 people for the center, which opened in March 2012. Remigiusz Wojciechowski is responsible for the opening of the project. "I am proud of the fact that Bayer AG has chosen Poland as the location"- said Dr. Dirk Ehle, Presi-

Nordea Bank Poland

HQ of parent company: Scandinavia
Year started in Poland: 1991
Number of Employees: Over 500
Services provided: Finance/IT

Reuters Europe SA

Sony Pictures Global Business Services Sp. z o.o.

HQ of parent company: United States
Year started in Poland: 2009
Number of Employees: 130
Services provided: Finance, SAP support, Payroll
Management in Poland: Michał Gryglewski, 608 457 600, michal_gryglewski@spe.sony.com

Speednet

Year started in Poland: 2007
Number of Employees: 80
Services provided: IT

Thomson Reuters

HQ of parent company: United States
Year started in Poland: 2006
Number of Employees: 900
Services provided: IT and finance, contact center

WNS

HQ of parent company: India

Katowice

General Motors

(Gliwice)
Number of Employees: 0-100
Services provided: SSC

Goyello

(Gliwice)
Number of Employees: 0-100
Services provided: BPO/ITO

Ista Shared Services

(Gliwice)
HQ of parent company: Poland
Year started in Poland: 2006
Number of Employees: 620
Services provided: Shared Service Centre

Pregis

(Gliwice)
HQ of parent company: Poland
Year started in Poland: 2008
Number of Employees: More than 100
Services provided: Finance, Accounting SSC

Tenneco

(Gliwice)

dent of Bayer. Ehle said it will be primarily focused on knowledge-based processes, in particular in the field of internal accounting.

WNS: Indian group WNS Global Services, a company founded in 1996 and listed on the New York Stock Exchange, started recruiting in April for employees for its new Gdansk F&A centre, which will employ several hundred people, including those who speak Spanish, Portuguese or Italian. "TriCity is winning some big global deals recently, including WNS, Bayer, OIE Support and Metsa Group", said Adam Sikorski, director at Thomson Reuters, which operates a centre in the region. ■

Katowice

Grupa Żywiec: In 2011 Grupa Żywiec SA established a Customer Service Centre in Katowice. Grupa Żywiec, a member of the Heineken Group, is one of the most important investors in the region. Customer Service Centre with the functions of call center employs 260 people. Centre has its office in Katowice Business Point. The main activity of the new CSC is active acquisition and order handling from more than 80,000 stores located all over the country.

"Grupa Żywiec appreciated potential of the Agglomeration. Katowice was selected because of the easy access to skilled workers, low costs of setting up the Center, good transport, ICT infrastructure, optimal standard of real estate and short time for starting the project"- said Mariusz Borowiak, Board Member, Sales and Distribution Director of Grupa Żywiec. Huge commitment and support of the local authorities, particularly of the Katowice City Hall and the Poviát Labour Office in the recruitment process was important for the company. ■

Number of Employees: 0-100
Services provided: R&D
Management in Poland: 32 338 51 04/00

Vattenfall Business Services

(Gliwice)
HQ of parent company: Poland
Number of Employees: 150
Services provided: IT, Finance, Accounting SSC

Ista

(Gliwice, Katowice)
Number of Employees: 500-1000
Services provided: SSC

Tauron

(Gliwice, Katowice)
Number of Employees: 300-500
Services provided: SSC
Management in Poland: 32 303 36 01, 32 774 27 04

4EverNET

Services provided: BPO/ITO
Management in Poland: 32 790 77 77

Archidoc

HQ of parent company: Poland
Year started in Poland: 1994
Number of Employees: about 260
Services provided: BPO
Management in Poland: Piotr Cholewa – Owner, Konrad Rochalski – President, Waldemar Nowicki – Vice President of the Board

Arinso People Services Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 2003
Number of Employees: 86
Services provided: HR and SSC
Management in Poland: Tomasz Gadaj, info.pl@ngahr.com, 32 736 71 00

Asseco Poland S.A.

HQ of parent company: Poland
Number of Employees: 350
Services provided: IT Services
Management in Poland: Adam Góra – President

Asseco Systems

HQ of parent company: Poland
 Number of Employees: about 44
 Services provided: Software Solutions

Bombardier

HQ of parent company: Poland
 Year started in Poland: 2000
 Number of Employees: about 80
 Services provided: R&D

Capgemini BPO

HQ of parent company: France
 Year started in Poland: 2003
 Number of Employees: 2200
 Services provided: Finance & Accounting, Customer Care, Procurement, Marketing, Financial Services
 Management in Poland: Marek Grodziński

Capgemini ITO

HQ of parent company: France
 Year started in Poland: 2005
 Number of Employees: 1500
 Services provided: Infrastructure Management
 Management in Poland: Daniel Habrat

Comarch

HQ of parent company: Poland
 Year started in Poland: 2004
 Number of Employees: 220
 Services provided: BPO, Outsourcing IT services, IT solutions and help, software & hardware support
 Management in Poland: Janusz Filipiak – President of the Board, Piotr Piątosza – Vice President of the Board, Paweł Prokop – Vice President of the Board

Contact Center sp. z o.o.

HQ of parent company: Poland
 Year started in Poland: 1999
 Number of Employees: In Poland: 5915
 Services provided: Telesales, sales support, databases, call centre, debt recovery, marketing research, office services, voice recordings, business consultancy, handling overflow traffic, contact centre virtualisation
 Management in Poland: Zbigniew Biały – President of the Management Board

CYCLAD

Number of Employees: about 100
 Services provided: BPO/ITO

Deloitte BPO

HQ of parent company: Poland
 Year started in Poland: 2008
 Number of Employees: 13
 Services provided: Bookkeeping, accounting, payroll and HR administration
 Management in Poland: Piotr Żarski – Partner, Tomasz Konik – Partner of offices in Katowice and Cracow, Tomasz Walczak – Partner in Poznań Office

DisplayLink

HQ of parent company: Katowice
 Number of Employees: about 100
 Services provided: R&D

ENIRO Poland

HQ of parent company: Poland
 Services provided: BPO Call Centre

Ericsson

Number of Employees: 100-200
 Services provided: BPO/ITO

Ernst&Young

HQ of parent company: Poland
 Number of Employees: 40
 Services provided: BPO services relating to the keeping of books of account and payroll records, using the latest technology and employing processes of the highest world quality
 Management in Poland: Duleep Aluwihare – Managing Partner Ernst & Young Poland, Neil Hughes – Main Director in Poland, Leszek Lerch – Managing Partner, Director of regional offices in Katowice and Cracow

Manager's Profile**Wojciech Bartz**

Page Personnel

I started working for Page Personnel in Poland in 2011. I began on the position of Recruitment Consultant specialized in running recruitment processes within SSC/BPO sector. After seven months I was promoted to the position of Senior Consultant and currently I am responsible for managing own team and developing SSC/BPO unit within Finance & Accounting Division. On daily basis I am in charge of recruiting candidates on behalf of the world's biggest employers operating in Poland as well as HR consultancy for Clients running Shared Service Centers across the country.

My whole professional life is connected with Shared Service Centers and Business Process Outsourcing - I worked for Accenture, where I was responsible for process migration from Italy and had regular contact with Italian business partners. At Colgate - Palmolive I worked as a Cost Analyst & Fixed Assets Accountant. When I joined Page Personnel I went through a number of recruitment courses organized via internal Training Department of Michael Page Group in Poland which allowed me to run a comprehensive recruitment processes for my Clients.



I have studied Political Science and Management & Marketing at University of Szczecin and Università degli Studi di Genova.

I am 31 years old. I was born and grew up in Szczecin. During my studies I moved to Italy and spent there almost 2 years. I come back to Italy as often as possible. I was even about to set up my own business there but finally decided to move to Warsaw and start my professional development within SSC/BPO organizations but still working for Italian clients.

Personally I am a dedicated fan of the music of Genesis and very interested in coffee themes (different ways of preparation, business and coffee market). ■

Eton Park Capital Management/Ruch

Number of Employees: 200-300
 Services provided: SSC

Gliwice**Grant Thornton International**

HQ of parent company: Poland
 Number of Employees: 240
 Services provided: BPO, audit, accountancy outsourcing, tax advisory services and business advice,
 Management in Poland: Tomasz Wróblewski – Managing Partner

Heineken/Grupa Żywiec

Number of Employees: 100-200
 Services provided: SSC

ING Services Poland

Number of Employees: 200-300
 Services provided: SSC

IT4Q

Number of Employees: about 100
 Services provided: BPO/ITO
 Management in Poland: Wojciech Marciniak – Member of the Board, Dawid Kuboszek – Member of the Board

Katowicki Holding Węglowy

Number of Employees: about 100
 Services provided: SSC

Kroll Ontrack

HQ of parent company: Poland
 Year started in Poland: 2005
 Number of Employees: 31

Services provided: SSC, IT Customer Service, (data recovery; computer forensics service and software, strategic data management
 Management in Poland: Marek Suczyk – Managing Director

Mentor Graphics

Number of Employees: 200-300
 Services provided: R&D
 Management in Poland: 32 731 53 35

Neubloc

Number of Employees: about 100
 Services provided: R&D
 Management in Poland: 32 201 04 74

NorthgateArinso

Number of Employees: 0-100
 Services provided: BPO/ITO
 Management in Poland: 32 73 67 100

Poczta Polska

Number of Employees: 0-100
 Services provided: SSC
 Management in Poland: 32 253 25 01

Proximetry

Number of Employees: 0-100
 Services provided: R&D
 Management in Poland: Mirosław Ossysek – President, 32 258 06 82

PwC

Number of Employees: 300-500
 Services provided: SSC
 Management in Poland: Olga Grygier – President, Tomasz Reinfuss – Partner, Director Katowice Office

BPO/SSC Companies in Poland

Rockwell Automation

Number of Employees: 300-500
Services provided: SSC
Management in Poland: Sławomir Szpak – General Director Rockwell Automation in Poland, 32 720 80 00

Steria

Number of Employees: 300-500
Services provided: BPO/ITO
Management in Poland: Karine Brunet – CEO Steria Poland, Bruno Boquet-Dierctor GSC, 32 354 94 01

Timken

TP S.A.

HQ of parent company: Poland
Number of Employees: More than 400
Services provided: Call centre, Telecom Customer Service
Management in Poland: Maciej Witucki – President, prof. Andrzej K. Koźmiński – Chairman of the Supervisory Board TP S.A.

Unilever

HQ of parent company: Poland
Number of Employees: 92
Services provided: SSC, Logistics service
Management in Poland: Matthias John – UltraLogistik Operations Centre

UPC

HQ of parent company: Poland
Services provided: Call centre
Management in Poland: Simon Boyd – President UPC Poland

Vattenfall

Warta [Alarm Centre Warta]

HQ of parent company: Poland
Number of Employees: 50
Services provided: Call centre
Management in Poland: Krzysztof Kudelski – President of the Board, Frank Fripon – Vice President, Geert De Kegel – Vice President

OEX/Archidoc

(Katowice, Chorzów)
Services provided: BPO/ITO
Management in Poland: Katowice: 32 355 68 40, Chorzów: 32 721 99 01

France Telecom/Contact Center

(Katowice, Sosnowiec)
Number of Employees: 500-1000
Services provided: BPO/ITO

Arteria/Gallup

(Ruda Śląska)
Number of Employees: 300-500
Services provided: BPO/ITO

Kielce

ALBIT Usługi Informatyczne

HQ of parent company: Poland
Year started in Poland:
Services provided: IT
Management in Poland: 41 368 02 44

Altair Sp. z o.o.

HQ of parent company: Poland
Number of Employees: 85
Management in Poland: Dariusz Borek – President, Marek Wesolowski – Member of board, Krzysztof Palacz – Member of board

BC&O Polska Spółka z ograniczoną odpowiedzialnością S.K.A.

HQ of parent company: Poland
Management in Poland: 41 367 80 03

Biomedic INFO Sp. z o.o.

Management in Poland: 41 368 31 81

Call Center Inter Galactica Sp. z o.o.

HQ of parent company: Poland
Number of Employees: Over 2000
Services provided: Call Center; help desk; marketing research
Management in Poland: Pavlo Polishchuk – Project Manager; Call Center Inter Galactica Sp. z o.o.; ul. Szewska 6/7, 50-053 Wrocław, 71 722 72 00, fax: 71 722 72 99, mobile 514 222 201, pavlo.polishchuk@ccig.pl www.ccig.pl

CenterIT Sp. z o.o.

Services provided: IT
Management in Poland: 41 346 24 40

Centrum Systemów Komputerowych ZETO SA

Services provided: IT
Management in Poland: 41 36 42 200

ComplexComputers sp. zo.o.

Management in Poland: 41 368 06 01

Contact Center

HQ of parent company: France
Services provided: Call Center
Management in Poland: Zbigniew Biały – President

F.U.H Older Call Centre for Play)

Management in Poland: Dariusz Goch, 697 938 491

Info Enterprise

INFONETAX Sp. z o.o.

Management in Poland: 41 344 52 24

INFOVER S.A.

Management in Poland: 41 367 85 02/03

Kolporter INFO SA

HQ of parent company: Poland
Number of Employees: 2009 – 113
Services provided: Help-Desk, Call-Center; Outsourcing IT
Management in Poland: Prezes, Jarosław Ambroziak

Kophard Software

Management in Poland: 883998331

MaN Complex

Management in Poland: 41 332 74 00, 331 56 27

NOM (Niezależny Operator Międzysztyfowy)

PKB info

Management in Poland: 41 243 50 92

Przedsiębiorstwo Informatyczne PROKOMP

Management in Poland: 41 362 92 44

Przedsiębiorstwo Techniczne – Informatyczne “ZUBIX” Sp. z o.o.

Management in Poland: 41 344 44 47, 344 44 48

Przedsiębiorstwo Teleinformatyczne SOTRONIK

Management in Poland: 41 242 16 67

Przedsiębiorstwo Usług Informatycznych “Mario-Soft”

Management in Poland: 605350264

Sanek

Management in Poland: 41 331 99 31

Teledirect Sp. z o.o.

HQ of parent company: Poland
Number of Employees: 60
Services provided: Call Center
Management in Poland: Tomasz Ziemiak – Managing Director; mobile: 600 300 740; Tomasz Kluz – President, mobile: 605 582 603

Telbridge Sp. z o.o.

(Kielce siedziba firmy/call center w Warszawie)
Management in Poland: 22 420 56 60

Smartway

(Kielce/siedziba firmy Cracow)
Management in Poland: Jacek Batóg, 509 676 520

Kraków

ABB Centrum Badawczo-Rozwojowe i Centrum Faktury

Services provided: BPO/R&D

Accounting Plaza Central Europe

Services provided: BPO/F&A

Affiliated Computer Services of Poland

Services provided: BPO/IT/F&A/Contact Centre

AFS

HQ of parent company: Poland
Services provided: Shared Service Center

Akamai

Services provided: IT

Alexander Mann Solutions

Year started in Poland: 2005
Number of Employees: 430
Services provided: Recruitment Process Outsourcing, Recruitment Administration, Sourcing and candidate attraction
Management in Poland: Vic Khan, 515 152 407, vic.khan@alexmann.com; Jolanta Gantkowska, 512 477 724, jolanta.gantkowska@alexmann.com; Malgorzata Piotrowska, 515 152 406, malgorzata.piotrowska@alexmann.com

Amer Sports

Amway

HQ of parent company: USA
Number of Employees: 200
Services provided: SSC

Antenna Volantis Sytems

Services provided: IT

Apriso

Services provided: BPO/IT

AVEREAST GROUP

Services provided: IT

AZSoft S.A, Contact Center

Services provided: BPO/Contact Centre

Bayer

HQ of parent company: Germany
Number of Employees: 15
Services provided: R&D

BNP Paribas

HQ of parent company: F&A

Capgemini BPO

HQ of parent company: France
Year started in Poland: 2003
Number of Employees: 2200
Services provided: Finance & Accounting, Customer Care, Procurement, Marketing, Financial Services
Management in Poland: Marek Grodziński

Capgemini ITO

HQ of parent company: France
Year started in Poland: 2005
Number of Employees: 1500
Services provided: Infrastructure Management
Management in Poland: Daniel Habrat

Capita

HQ of parent company: UK
Services provided: Pension Fund Accounting
Management in Poland: Darren Owens

Capnor Poland

Services provided: BPO/Engineering Services

BPO sector in smaller urban centres

Business Centre in Kielce

BPO sector in Poland

Poland is an obvious leader in the Middle – East Europe referring to number of employees (85 ths) and number of BPO centres (337). Since last year 15.000 new jobs have been increased while the worth of sector has increased by 3 mld PLN and now it is about 12 mld PLN. Poland can effectively compete with India or China in range of outsourcing projects.

The Investors place their capital in main Polish agglomerations as Warsaw, Wrocław, Cracow, Łódź or Poznań. Smaller urban centres as Kielce are so ambitious that new and favourable abilities for potential investors can be found there.

In Kielce, why ?

Kielce is located centrally between Warsaw and Cracow at national road 7 (which was rebuilt for Euro 2012). Travel by car from Kielce to Cracow takes 1,5 hour, just like travel from Kielce to Warsaw. Charter planes can also land in Masłów airport located 8 km from Kielce centre.

Kielce is capital of Świętokrzyskie Voivodeship, and population of voivodeship is about 1,3 mln. Kielce is an academic centre, where about 50 000 students are educated and high schools provide annually 13 000 well educated graduates who speak fluently foreign languages. Monthly average cost of work is 2310,00 PLN (520 EUR), unemployment rate in voivodeship is 15 % (in age group 25 – 44 it is 25 %).

The main part of Świętokrzyskie Region is occupied by the oldest mountains in Europe: Holy Cross Mountains. It is one of the most beautiful and ecological areas in Poland where heavy industry has never left a stamp on the nature. The region can offer lots of touristic attractions, summer and winter sports as skiing, climbing, canoes, sailing, motor sports, etc. The region has its unique and friendly character thanks to rich Slavic culture and tradition which are cultivated by inhabitants. Kielce can also offer philharmonic hall, theatres, museums and the biggest shopping arcades in Poland.

Business Centre in Kielce

Currently City Core LLC is the owner of 5 hectare area in the centre of Kielce and office building class B with total area 21 000 m² which was bought from Skanska company 4 years ago. At present we can offer 2000 m² rental area class B. It is open space or it can be arranged according to tenants wishes. In case of 5 years or longer contracts we can ensure adaptation of offices according to project which is provided by the tenant. The adaptation will be done using standard materials, we will also provide computer network and furniture according to customer wishes. For the companies which have three-shift work system we can ensure transport for workers during night hours (from 11.00 p.m. to 04.00 a.m.)



Business Centre in Kielce

The office area which is offered can be initial stage for potential customers interested in investing in Kielce. First the companies can establish staff and build the structure of the company and next they can move to modern Business Park which is mentioned next in the article.

City Core LLC is now carrying on final negotiations with Special Economic Zone which

are supported by authorities of Kielce. Negotiations refer to the companies which can conduct their activity in Business Centre in Kielce and they can enjoy privileges of Special Economic Zone. The conditions which must be fulfilled by the companies are included in Regulation of the Council of Ministers as of 10 December 2008. According to the criteria the companies should create 105 new jobs (accounting, financial audit, IT programming services) or minimum 36 new jobs in range of scientific research.

Our potential customers can start their activity within 30 days since agreement is signed and arrangement project is accepted. These are indisputably one of the best conditions which can be offered on Polish market. Rental rate are lower by 30 – 40 % than rates in Warsaw and in Cracow; moreover in case of long term contracts prices are subject to negotiations.

Future belongs to us

A modern Business Park will be shortly given to tenants. It will be located on 5 hectare area and surrounded by green areas. The complex will be constituted by 4 buildings with total area 36 000 m². The building class A will have 9 floors and the car park for 1500 cars will be available for tenants.

Now we carry on advanced talks with High Schools representatives about creating special languages courses (Dutch language and Scandinavian languages) and specialized fields of studies and accounting according to International Accounting Standards. Our qualified advisors can offer mediation in obtaining grants for the companies which will create new jobs in Kielce.

We choose Kielce

It is obvious that small and ambitious cities as Kielce can offer more than big-city centres. Small cities are more flexible for businessman expectations; they can offer good location at lower costs and additionally culture, entertainment and sport activities.

A View of the City From the Top of Business Centre Building in Kielce



The details about Business Centre in Kielce can be found at:

www.kieleckiecentrumbiznesu.com

For more information you can contact:

anna.parkita@citycore.pl , tel. + 48 606 472 324

magda.staron@kongresowcy.pl, tel. + 48 41 33 26 485; 512 402 451

BPO/SSC Companies in Poland

CBB Call Center

Services provided: BPO/Contact Centre

CGI Information Systems and Management Consultants

Services provided: BPO/IT

CH2M HILL

Services provided: BPO/R&D

Chatham Financial

Services provided: BPO/Business Analytics

Cisco

Services provided: SSC, Center of Excellence

Clifford Thames

Number of Employees: 500

Services provided: BPO/Business Analytics

Comarch

HQ of parent company: Poland

Number of Employees: 1000

Services provided: IT

Communication Factory

HQ of parent company: USA

Number of Employees: 100

Services provided: Call Center

Contact Center sp. z o.o.

HQ of parent company: France

Year started in Poland: 1999

Number of Employees: In Poland: 5915

Services provided: Telesales, sales support, databases, call centre, debt recovery, marketing research
Management in Poland: Zbigniew Biały – President

Deloitte BPO

HQ of parent company: Poland

Year started in Poland: 2008

Number of Employees: 13

Services provided: Bookkeeping, accounting, payroll and HR administration
Management in Poland: Piotr Żarski – Partner, Tomasz Konik – Partner of offices in Katowice and Cracow, Tomasz Walczak – Partner in Poznań Office

Delphi Centrum Techniczne (TCK)

Services provided: BPO/R&D

Delta Vista Poland

Services provided: SSC/R&D

Digitland

Services provided: BPO/IT

DreamLab Onet.pl

Services provided: SSC/R&D

EDF

Services provided: F&A/HRO/CP/ITO/Engineering

Electrolux Centrum Księgowo-Finansowe

Services provided: BPO/F&A

Element14

Services provided: SSC

Elettric 80

Services provided: BPO/R&D

EPAM Systems

Services provided: BPO

Ericpol Telecom

Services provided: BPO/IT

ESET

Services provided: BPO/R&D

Euroscript Poland

Services provided: BPO

Exult

HQ of parent company: India

Services provided: IT/F&A

Flying Fish

Services provided: BPO/IT

FMC Technologies

Number of Employees: 150

Services provided: R&D engineering

Fortis Bank

HQ of parent company: USA

Number of Employees: 50

Services provided: Clearing Center

FQS Poland

Services provided: BPO/R&D

Google Operations Centre

Services provided: SSC/R&D

HCL Poland

Services provided: BPO/IT/F&A

Heineken

Services provided: F&A/HR/ITO

Hewitt Associates

Services provided: BPO/HR

Hitachi Data Systems

Services provided: SSC/F&A

HSBC Service Delivery (Polska) Sp z o.o.

Year started in Poland: 2010

Number of Employees: 1 000 FTE+/-

Services provided: Professional services, General Processing, Contact Centre, Data Entry
Management in Poland: Kevin D Kent Head of European Service Centres, 12 399 31 11, kevin.d.kent@hsbc.com

HTS-Comarch

Services provided: BPO/IT

IBM Poland Laboratorium Oprogramowania IBM & IBM BTO Business Consulting Services

Year started in Poland: 1996

Services provided: Finance & Accounting Services,
Management in Poland: Marcin Orłowicz, 661 304 951, marcin.orlowicz@pl.ibm.com

IFS

HQ of parent company: Sweden

Number of Employees: 50

Services provided: ERP/IT

Iloop Mobile

Services provided: BPO/call center

Intelnet European Services

HQ of parent company: India

Services provided: BPO/Business Analytics

International Paper Poland

Services provided: SSC/F&A/IT/Contact Centre

Lufthansa Airline Accounting Center

Services provided: BPO/F&A

Lurgi Poland

Services provided: Engineering Services

Luxoft

HQ of parent company: Rosja

Year started in Poland: 2010

Number of Employees: 160

Services provided: IT

Management in Poland: Przemysław Berendt, 12 445 88 00, pberendt@luxoft.com; Wojciech Mach, 12 445 88 00, wmach@luxoft.com

Metrosoft Poland

Services provided: BPO/IT

Motorola GSC

Services provided: SSC/R&D/F&A

Nokia Siemens

Services provided: Hardware and Software Development

Philip Morris International Service Center Europe

Services provided: BPO/F&A

Pliva Cracow

HQ of parent company: Croatia

Number of Employees: 100

Services provided: R&D

PNO Consultants

Services provided: BPO/Business Analytics

Quorum International

Services provided: SSC/R&D

Rolls Royce

Services provided: SSC/R&D

RR Donnelley Europe

Services provided: SSC/F&A

Sabre Holdings Europejskie Centrum Oprogramowania

Services provided: BPO/R&D

Kraków:

Cisco officially opened their Global Support Center in Kraków:

The Cisco Global Support Center is part of a network of operations located around the globe and has a special focus on Europe, Middle East, Africa and Russia (EMEAR). "By establishing a shared services center in central Europe, our aim is to get closer to our customers, in terms of geography and time zones, while offering the convenience of support in multiple languages," says Olivier Kohler, senior vice president, Global Business Services, Cisco. The center is located in Krakow's Podgorze district and features Cisco's communication and collaboration technologies including Cisco TelePresence, connecting the Krakow-based team

with the global Cisco community, partners and customers. Cisco expects to employ 80 people by August 2012. The center will facilitate existing locations to provide technical and business services internally and externally, including channel partners and customers, across multiple functional groups such as Cisco Services, Finance, Operations and others.

Brown Brothers Harriman: BBH has opened a financial analysis centre in Krakow, and may eventually employ as many as 450 people. BBH is the oldest private bank in the U.S. (since 1818), offering investment advisory and management, and banking and consulting services. It has 16 offices, including four in Europe (London, Dublin, Zurich and Luxembourg). ■

Selvita

Services provided: BPO/R&D

Shell Shared Service Centre Poland

Services provided: SSC/F&A/Contact Centre

Software Mind

Services provided: BPO/IT

State Street Corporation

Services provided: SSC/F&A

Tesco Poland

Services provided: SSC/F&A

UBS Poland Service Centre

HQ of parent company: Switzerland

Year started in Poland: 2008

Number of Employees: 300

Services provided: Finance, Legal, Compliance, Risk, IT

Development and Corporate Shared Services

Management in Poland: Antony Roberts-York CEO

UBS Poland Service Centre; Michal Stepień COO

UBS Poland Service Centre; Tomasz Zurek CFO UBS

Poland Service Centre

UPM Kymmene

Services provided: SSC/IT

Wyse Technology

Services provided: R&D

Łódź**ABB**

HQ of parent company: Switzerland

Year started in Poland: 2008

Number of Employees: 20

Services provided: IT

Accenture

HQ of parent company: USA

Year started in Poland: 2005

Number of Employees: 80

Services provided: IT

ACS Solutions Poland/Xerox

HQ of parent company: USA

Year started in Poland: 2001

Number of Employees: 150

Services provided: F & A

AMG.net

HQ of parent company: USA

Year started in Poland: 1996

Number of Employees: 180

Services provided: IT

Atos Origin

HQ of parent company: France

Number of Employees: 85

Services provided: F & A

Management in Poland: Monika Thompson

Bank Pekao SA

HQ of parent company: Italy/Poland

Number of Employees: 300

Services provided: Back-office, call centre

BNP Paribas Fujitsu Services**Bosch&Siemens****BSH**

HQ of parent company: Germany

Year started in Poland: 2007

Number of Employees: 50

Services provided: R&D/IT

BSS – Business Support Solution S.A.

HQ of parent company: Poland

Year started in Poland: 2010

Number of Employees: 300

Services provided: F & A

Cardif Services

HQ of parent company: France

Year started in Poland: 2007

Number of Employees: 170

Services provided: F & A; Call centre

CERI International Sp. z o.o.

HQ of parent company: Poland

Year started in Poland: 2003

Services provided: Document management,

Transaction banking, Managing business processes

Management in Poland: Andrzej Górecki, 42 270 49 01

Citi Handlowy

HQ of parent company: USA

Year started in Poland: 2005

Number of Employees: 370

Services provided: F & A

CitiFinancial

HQ of parent company: USA

Number of Employees: 10

Services provided: Debt collection centre

Management in Poland: -

Comarch S.A.

HQ of parent company: Poland

Year started in Poland: 2006

Number of Employees: 200

Services provided: IT

Contact Center sp. z o.o.

HQ of parent company: France

Year started in Poland: 1999

Number of Employees: In Poland: 5915

Services provided: Telesales, sales support, databases,

call centre, debt recovery

Management in Poland: Zbigniew Biały – President

CWS-boco Polska Sp. z o.o.

Year started in Poland: 1995

Number of Employees: 500



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biuro@kpt.krakow.pl

BPO/SSC Companies in Poland

Services provided: Uniforms cleaning/upkeeping
Management in Poland: Andrzej Smółko, Miłosz Mrozik

DHL Express

HQ of parent company: Germany
Year started in Poland: 2007
Number of Employees: 300
Services provided: Call centre

Dimar

HQ of parent company: France
Number of Employees: 100
Services provided: Call centre
Management in Poland: Jasja van der Veen

Ericpol Telecom

HQ of parent company: Poland
Year started in Poland: 2006
Number of Employees: 390
Services provided: IT

Fujitsu Technology Solution

HQ of parent company: Japan
Year started in Poland: 2009
Number of Employees: 410
Services provided: IT service desk
Management in Poland: Dave Deane – Head of Global Delivery Centre, Dave.Deane@ts.fujitsu.com, mobile: 665 404 310

GE Power Controls

HQ of parent company: USA
Year started in Poland: 2004
Number of Employees: 55
Services provided: Finance, accounting

IBM

Indesit

HQ of parent company: Italy
Year started in Poland: 2006
Number of Employees: 65
Services provided: Finance, accounting

Infosys BPO Poland Sp. z o.o.

HQ of parent company: India
Year started in Poland: 2007
Number of Employees: over 1300
Services provided: F&A, purchasing, service logistics, database management, advisory and consultin
Management in Poland: Agnieszka Jackowska-Durkacz, 42 291 80 00, agnieszka_jackowska@infosys.com

INTERsoft

HQ of parent company: Poland
Year started in Poland: 1997
Number of Employees: 70
Services provided: IT

LSI

HQ of parent company: Poland
Year started in Poland: 1991
Number of Employees: 130
Services provided: IT

MacoLab

HQ of parent company: Poland
Year started in Poland: 1993
Number of Employees: 50
Services provided: IT

Łódź

Sii: Sii, a French IT company, plans to open its seventh location in Poland. The company already employs 1,000 people in Poland, and plans to hire an additional 40 in its newest branch in Łódź. Sii Polska, which was founded six years ago, has opened a new office in Poland almost every year. ■

Mbank&Mulitbank

HQ of parent company: Poland
Year started in Poland: 2001
Number of Employees: 800
Services provided: Call center; Finance and accounting

Mellon

Mobica

HQ of parent company: UK
Year started in Poland: 2007
Number of Employees: 70
Services provided: IT

Nordea

HQ of parent company: Sweden
Year started in Poland: 2001
Number of Employees: 250
Services provided: Finance and accounting

Nordea Operation Center

Number of Employees: 100
Services provided: SSC

Nycomed/Takeda

Philips

HQ of parent company: Holland
Year started in Poland: 2003
Number of Employees: 70
Services provided: Purchase Center

Polkomtel

HQ of parent company: Poland
Year started in Poland: 2003
Number of Employees: 370
Services provided: Call Centre

PTC

HQ of parent company: Poland/Germany
Year started in Poland: 2006
Number of Employees: 700
Services provided: Call centre

Randstad Payroll Solutions Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 1998
Number of Employees: 50 osób
Services provided: Payroll and HR file administration
Management in Poland: Katarzyna Plucinska – Managing Director

Rule Financial

HQ of parent company: UK
Year started in Poland: 2007
Number of Employees: 50
Services provided: IT

SAP

SouthWestern BPS Poland Sp. z o.o.

HQ of parent company: Ireland
Year started in Poland: 2007
Number of Employees: 150
Services provided: Finance, Accounting, Administration, CRM, Call Center
Management in Poland: Wiktor Doktor; wiktordoktor@southwestern.ie; 42 288 07 00

T-Mobile

HQ of parent company: Poland/Germany
Number of Employees: 700
Services provided: Back-office, contact centre
Management in Poland: Daniel Stańczuk

Tate&Lyle

Teleca

HQ of parent company: Sweden
Year started in Poland: 1999
Number of Employees: 150
Services provided: IT

TomTom

HQ of parent company: Holland
Year started in Poland: 2007

Number of Employees: 205
Services provided: Centrum Przetwarzania Obrazu

TP S.A.

HQ of parent company: Poland/France
Year started in Poland: 2003
Number of Employees: 300
Services provided: IT

Transition Technologies

HQ of parent company: Poland
Year started in Poland: 2006
Number of Employees: 130
Services provided: IT

Unicredit

HQ of parent company: Italy
Year started in Poland: 2006
Number of Employees: 41
Services provided: IT

Virtual Viewing

Warta Insurance Group

HQ of parent company: Poland
Year started in Poland: 2004
Number of Employees: 60
Services provided: Debt collection centre

Lublin

Asseco Business Solutions

Services provided: IT

Britenet

Comarch

Services provided: IT

CRH Żagiel

e-sąd

Emperia Info

Gepact

Inteligo-PKO BP

Kredyt Bank

MikroBIT

Orange Costumer Service

PCM

Proama

Warta 24 Plus

Zeto Sp. z o.o.

Services provided: IT

Opole

Call Center Inter Galactica Sp. z o.o.

HQ of parent company: Poland
Number of Employees: Over 2000
Services provided: Call center – english, german, russian, ukrainian, czech, italian, spanish
Management in Poland: Pavlo Polishchuk – Project Manager

Capgemini

Management in Poland: 32 769 24 00

Future Processing Sp. z o.o.

Opta data Sp. z o.o.

PZU S.A./PZU Życie S.A.

HQ of parent company: Poland
Number of Employees: 140
Services provided: Accounting
Management in Poland: Andrzej Klesyk – President



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BPO/SSC Companies in Poland

R.N.G. Sp. z o.o.

HQ of parent company: Poland
Number of Employees: Planned 60
Services provided: Call center
Management in Poland: Magdalena Daszkiewicz – Manager

Poznań

arvato services Poland (branch of Bertelsmann Media Sp. z o.o.) – 4 centers in Poznań and close to the city

HQ of parent company: Poland
Year started in Poland: 1994
Number of Employees: In Poland: 2350
Services provided: BPO – IT, lettershop, logistics, loyalty programs, back office, financial services (financial BPO, debt recovery, factoring)
Management in Poland: Janusz Jankowiak – President, 61 652 88 00, arvato@arvato.pl

BRIDGESTONE EBS Sp. z o.o. European Business Services

HQ of parent company: Japan
Year started in Poland: 2011
Number of Employees: 115
Services provided: Service accounting and payroll processes for companies Bridgestone
Management in Poland: Warren Mitchell Director, Finance (the future head of the center in Poznań), warren.mitchell@bridgestone.eu; current contact: Karol Wawrzynowski Manager, Finance&Accounting karol.wawrzynowski@bridgestone.eu; phone: 61 665 40 99

Carlsberg Accounting Service Center

HQ of parent company: Germany
Year started in Poland: 2006
Number of Employees: 200
Services provided: Accounts in the three processes, ie receivables, liabilities and general ledger
Management in Poland: Lars Rasmussen Director
Carlsberg Accounting Service Centre Sp. z o.o., Mała Garbary 961-756 Poznań; tel. 61 844 11 00, fax 61 844 11 02

Ciber

HQ of parent company: USA
Year started in Poland: 2010
Number of Employees: 80
Services provided: Managing technical support, monitoring, IT infrastructure, web operations, application services
Management in Poland: Piotr Sawiński Center Manager
CIBER Poland Sp. z o.o., PFC Poznań, pl. Andersa 5, office@ciber-Poland.pl

Contact Center sp. z o.o.

HQ of parent company: France
Year started in Poland: 1999
Number of Employees: In Poland: 5915
Services provided: Telesales, sales support, databases, call centre, debt recovery, marketing research, office services, voice recordings, business consultancy, handling overflow traffic, contact centre virtualisation
Management in Poland: Zbigniew Biały – President of the Management Board

Dalkia Services shared service center of finance and accounting

HQ of parent company: France
Year started in Poland: 2006
Number of Employees: 70
Services provided: General accounting and reporting, and IT

Deloitte BPO

HQ of parent company: Poland
Year started in Poland: 2008
Number of Employees: 13
Services provided: Bookkeeping, accounting, payroll and HR administration
Management in Poland: Piotr Źarski – Partner; Tomasz Konik -Partner of offices in Katowice and Cracow, Tomasz Walczak – Partner in Poznań Office

Duni European Financial Centre

HQ of parent company: Sweden
Year started in Poland: 2005
Number of Employees: 35
Services provided: Finance Shared Services
Management in Poland: Krister Gullstrom, 61 656 07 11, krister.gullstrom@duni.com

Franklin Templeton Investments Center

HQ of parent company: USA
Year started in Poland: 2007
Number of Employees: 300
Services provided: Transfer agent, fund accounting and back office services for the operation of investment
Management in Poland: Krzysztof Bronisz – Vice President Operations, Kbronisz@franklintempleton.de, 61 667 90 16

GlaxoSmithKline Global IT Centre

HQ of parent company: United Kingdom
Year started in Poland: 2005
Number of Employees: 200
Services provided: IT services for all branches of GSK in the world. Center serves more than 100 countries to manage the remote services and IT infrastructure company
Management in Poland: Andrea Johannes, Ph.D Site Director, 61 860 13 11, andrea.a.johannes@gsk.com

Grace

Services provided: R&D

Grant Thornton Frąckowiak Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 1993
Number of Employees: 250
Services provided: BPO Accounting-Finance, SSC, Outsourcing of Accounting and Payroll
Management in Poland: Katarzyna Banach, 61 625 13 91, katarzyna.banach@pl.gt.com; Agnieszka Chwalińska, 61 625 13 97, agnieszka.chwalinska@pl.gt.com; Magdalena Marcinowska, 61 625 14 02, magdalena.marcinowska@pl.gt.com

Grupa BCC External Services

HQ of parent company: Poland
Year started in Poland: 1999
Number of Employees: 30
Services provided: A comprehensive range of outsourcing, including both business processes and IT tools.
Management in Poland: Bartłomiej Buszczak Chairman of the Board, 61 827 70 00

Holicon Contact Center

HQ of parent company: Poland
Year started in Poland: 2004
Number of Employees: 1200
Services provided: IT and Sales process services; Help desk; Call center and ESP systems
Management in Poland: Marcin Pankau, 61 664 32 00, marcin.pankau@holicon.pl; Krzysztof Chyliński, 61 664 32 00, krzysztof.chylinski@holicon.pl; Joanna Borowicz, 61 664 32 00, joanna.borowicz@holicon.pl

HolidayCheck

Services provided: ITO

IKEA Shared Services Sp z o.o.

HQ of parent company: Sweden
Year started in Poland: 2010
Number of Employees: 30 planned 300
Services provided: Service accounting and payroll processes for companies IKEA

Itella Information Sp. z o.o.

HQ of parent company: Finland
Year started in Poland: 2005
Number of Employees: 15
Services provided: Finance
Management in Poland: Miikka Savolainen – Managing Director, miikka.savolainen@itella.com, mobile: 512 363 137

Jerónimo Martins

Services provided: SSC

Kennametal Center Services

HQ of parent company: USA
Year started in Poland: 2010
Number of Employees: 35
Services provided: Customer Service, Finance, Human Resources, Engineered Solutions, Sales. Business support and management reporting for the region.
Management in Poland: Robert Mazurek Vice President

Kleffmann

HQ of parent company: Denmark
Number of Employees: 20
Services provided: Call center

MAN Accounting Center Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 2006
Number of Employees: 300
Services provided: Accounting, Purchasing, Payroll calculation
Management in Poland: Wojciech Skrudlik, 61 886 72 00, wojciech.skrudlik@man.eu

McKinsey&Company Support Services Center

HQ of parent company: USA
Year started in Poland: 2011
Number of Employees: Planned employment 250
Services provided: Support agencies and departments operating in Europe

Mentor Graphics

HQ of parent company: USA
Number of Employees: 20
Services provided: R&D
Management in Poland: Grzegorz Mrugalski

Microsoft

HQ of parent company: USA
Number of Employees: 20
Services provided: IT

Open Text IT Competence Center

HQ of parent company: Canada
Year started in Poland: 2009
Number of Employees: 20
Services provided: Technical support and customer implementation, training

Q-Partners

Services provided: R&D

Randstad Payroll Solutions Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 1998
Number of Employees: 50
Services provided: Payroll and HR file administration
Management in Poland: Sylwester Czarnecki – Senior Sales Manager, sylwester.czarnecki@pl.randstad.com, mobile 697 544 344, Katarzyna Plucinska – Managing Director, katarzyna.plucinska@pl.randstad.com, mobile 512 352 179

Roche IT Service Centre

HQ of parent company: Switzerland
Year started in Poland: 2009
Number of Employees: 200
Services provided: Creating and maintaining systems for clinical research, and programs to support internal processes

Samsung

Number of Employees: 150
Services provided: R&D Software

Sii IT outsourcing

HQ of parent company: France
Year started in Poland: 2010
Number of Employees: 20
Services provided: Advice on new technologies, complex IT solutions

Starter Truck Services

HQ of parent company: Germany
Number of Employees: 35

The Rise of the Superlocation

Kraków is by far CEE's top location for offshoring. In a country which itself is experiencing an outsourcing boom, Kraków accounts for 35-40% of global services jobs in Poland and headcount growth has topped 25% in each of the last two years.



BiznesPolska editor Thom Barnhardt spoke to Andrew Hallam, Founder of ASPIRE, the thriving BPO/SSC association in Kraków, to understand what lies behind the rise of CEE's first backoffice superlocation and why he believes the city will continue to accelerate away from its rivals.

Andrew, can you tell us who is in Kraków?

It's a long list. There are over 70 multinationals running offshore activities out of Kraków. To give you a taste: in the tech space, Google, Cisco, Akamai, Motorola, Sabre; in outsourcing, Genpact, HCL, Capgemini, IBM; in shared services, companies such as Shell, HSBC, Philip Morris, Electrolux and Heineken. There are also some prestige niche players, especially in financial services, such as State Street and Brown Brothers Harriman.

So how many people work in the sector in Kraków and how fast are you growing?

26,000 people work across the industry in Kraków and the number continues to rise: in each of the last two years headcount has gone up by 25% as centres add new service lines and more complex processes. New centres are also entering the market - 15 in the last 12 months.

This is presumably why you refer to Kraków as a superlocation, but doesn't the idea of the superlocation run counter to the orthodoxy about offshoring, that locations overheat, reach saturation, and costs rise negating the cost benefits, in particular the labour arbitrage, that made the location attractive. Other locations become more cost competitive and the show moves on. Can Kraków buck this trend?

But the evidence in Kraków challenges that orthodoxy. Colliers and ASPIRE track office rents across Poland and rents in Kraków are the second lowest among the major cities in Poland, only rents in Łódź are lower; we also track salaries which are on the same level as the other cities, with the ex-

ception of Warsaw, where salaries are much higher. This means supply is rising to match demand.

Doesn't this just mean that you haven't reached saturation yet?

I think something else is going on, something which is both a function of the size and the relative maturity of the Kraków market vis-a-vis other cities in the region. In short, we are experiencing the benefits of scale.

Can you expand on that?

For instance, size can give rise to innovation. We have a very interesting Internet start-up, Rekomend.Me, a social networking site which enables people to recommend their friends and colleagues as candidates for job vacancies. With 6,000 new jobs per annum, the market is big enough to make this a viable business.

Size also gives rise to a certain predictability and equilibrium in the market. We can measure the market and measure the trends in the market. You see this in real estate where developers have the confidence to build on spec and there is a steady pipeline of office projects. Notwithstanding demand for space the office vacancy rate is stable at around 6-8%.

Size also has a gravitational pull which is evident in the labour market. The industry is very visible and starts to act as a magnet for talent. One in eight people in Kraków that work in the private sector work in outsourcing, much higher in the 25-35 year old demographic which populate the centres. Students become increasingly attuned to the needs of the industry, which is important since 70% of those working in the centres are graduates of Kraków universities, but equally young people from across Poland and, in fact, across Europe are willing to move to Kraków. This is important if you start to look long term. The student demographic is set to fall across Poland, but Kraków universities have the advantage of close industry ties and

are able to offer students good job prospects during and after study. Incidentally, with Warsaw, Kraków is one of only two Polish cities with positive migration.

What role is ASPIRE playing in the evolution of the industry in Kraków?

ASPIRE exists to accelerate the development of the ecosystem that supports the development of the industry. We facilitate and to certain extent forge the network. We are an industry initiative which is very important. Our starting point is data, shared data which helps to identify the challenges and opportunities and can therefore prompt corrective actions, both in terms of current issues and long term issues. Crucially, what we are measuring is location specific because the local environment is key to the success of the outsourcing model.

ASPIRE itself can be viewed as a corrective action. We recently asked Fons Trompenaars, the expert on intercultural communication and stakeholder interactions, to conduct what is called a sustainability scan, which basically identifies where we as an industry get pulled by competing stakeholders. Given the nature of the industry, the focus, of course, is on the customer and on shareholder value, less so on society. But the local environment is key to the sustainability of the business model. This is where ASPIRE intervenes at a deep level.

Can this be replicated in other locations?

I think this will be difficult. Kraków has first mover advantage - the industry in Kraków stretches back to the end of the 1990s. We also have the momentum. And then there is something like the spirit of the place, the *genius loci*. Kraków has a history of challenging orthodoxy. Copernicus, who famously challenged the orthodoxy that the Earth is flat, studied in Kraków. This is relevant in terms of outsourcing. There is something called the "flat earth" theory, originally propounded by the US journalist Tom Friedman, which underpins the outsourcing model - it suggests that in a global world services can be performed anywhere with an internet connection. A closer look at the evidence, however, shows that capital, ideas, talent tend to be focussed in particular locations, that the Earth is not flat. This is something we have known in Kraków for 500 years. ■

Andrew Hallam is Founder and General Secretary of ASPIRE - the Association of IT and Business Process Services. A graduate of the University of Oxford, he has lived and worked in Kraków since 1995.

BPO/SSC Companies in Poland

Services provided: Call Center – road assistance service in five languages (English, German, French, Italian and Russian)
Management in Poland: Waldemar Kulagowski – Sales Manager; 61 831 98 09, waldemar.kulagowski@starter24.pl

Talex

Services provided: BPO/ITO

Telcordia Technologies

HQ of parent company: USA
Services provided: R&D
Management in Poland: Michał Wodczak

Unilever

HQ of parent company: International
Number of Employees: 70
Services provided: R&D
Management in Poland: Anthony Natt

W.R.Grace

HQ of parent company: USA
Number of Employees: 20
Services provided: Research Laboratory
Management in Poland: Jacek Walkowiak

Wikia

HQ of parent company: USA
Number of Employees: 20
Services provided: R&D
Management in Poland: Emil Podlaszewski – Member of the Board

ZETO

Services provided: BPO/ITO

Business Consulting Center sp. z o.o.

(Poznań, Złotniki Suchy Las)
HQ of parent company: Poland
Year started in Poland: 1995
Number of Employees: over 200
Services provided: IT outsourcing, SAP offshoring, SAP bodyleasing, SAP outsourcing
Management in Poland: Bartłomiej Buszczak, Waldemar Sokołowski, Andrzej Moskalik

Lorenz Snack-World Services Sp. z o.o. Spółka Komandytowa

(Poznań, Sady, Tarnowo Podgórne)
HQ of parent company: Poland
Year started in Poland: 2008
Number of Employees: 63
Services provided: Accounting
Management in Poland: Jens Emrich – General Manager
jens.emrich@LBSnacks.com, Member of the Board – Andrzej Okupniak aokupniak@LBSnacks.pl

Digital-Center sp. z o.o.

(Poznań, Suchy Las)
HQ of parent company: Poland
Year started in Poland: 1993
Number of Employees: 80
Services provided: Digitalizacja zbiorów zszytych i oprawnych, digitalizacja obiektów przestrzennych, skanowanie i mikrofilmowanie zbiorów archiwalnych

Magellan Software Poland S.A.

(Poznań, Suchy Las)
HQ of parent company: Poland
Year started in Poland: 2002
Number of Employees: 30
Services provided: Digital Archiving; Document scanning; traditional archiving

Intelligence

(Poznań, Tarnowo Podgórne)

External Services sp. z o.o.

(Poznań, Złotniki Suchy Las)
HQ of parent company: Poland
Year started in Poland: 2007
Number of Employees: over 30
Services provided: Payroll outsourcing, HR administration outsourcing
Management in Poland: Michał Szymaczek, Piotr Rogala

Radom

Centrum Przetwarzania Danych Ministerstwa Finansów

Energetyczne Centrum S.A.

Europe Calling – Międzynarodowe Call Centre

Intermedia Consulting S.C. M.Gajewski. J.Borek

HQ of parent company: Poland
Management in Poland: 22 613 61 35, mgajewski@inconsulting.pl

Iron Mountain – Centrum Przetwarzania Danych

SMG/KRC – Call Centre

Telbridge Radom

Rzeszów

Centrum Usług Finansowych ACP Pharma S.A.

HQ of parent company: MEDIQ NV Holland (Utrecht)
Year started in Poland: 2010
Number of Employees: About 80
Services provided: Finance, service ACP PHARMA Group
Management in Poland: Daniel Pitrus, Director CUF

Centrum Zastosowań Informatycznych

Contact Center sp. z o.o.

HQ of parent company: France
Year started in Poland: 1999
Number of Employees: In Poland: 5915
Services provided: Telesales, sales support, databases, call centre, debt recovery, marketing research
Management in Poland: Zbigniew Biały – President

ContactPoint

HQ of parent company: Warsaw
Year started in Poland: 2003 Poland, 2006 Rzeszów
Number of Employees: ok. 600
Services provided: Call center; CATI, BPO
Management in Poland: Michał Kończak – President; Wojciech Lasoń – Sales Director; office@softsystem.pl

Cross Jeans

Number of Employees: 20
Services provided: R&D software

Hamilton Sundstrand

HQ of parent company: USA
Number of Employees: 150
Services provided: R&D

ICN Polfa Rzeszów

HQ of parent company: France
Year started in Poland: 1997
Services provided: Call centre
Management in Poland: Mariusz Gajowniczek – President, Alicja Syrek, Małgorzata Lech-Zimny – Technical Department, Alicja.Syrek@valeant.com, Małgorzata.LechZimny@valeant.com, ICN_Polfa@valeant.com

K&K SELECT Sp. z o.o.

Pratt&Whitney

Sanofi Aventis

HQ of parent company: France
Year started in Poland: 2006
Number of Employees: 190
Services provided: Call centre
Management in Poland: Marynika Woroszyńska-Sapieha – President, General Manager; Wiesław Karpowicz – Member of the Board and Finance Director

Soft System

HQ of parent company: SCC Soft Computer (Floryda, USA)
Year started in Poland: 1990
Number of Employees: About 300

Services provided: Call centre
Management in Poland: Liliane Saberin – President, Marek Konrad Stoniewski – Vice President, Waldemar Waligóra – Vice President

Systemy Informatyczne Set(h) Sp. z o.o.

HQ of parent company: Poland
Services provided: IT
Management in Poland: Krysztof Bobran – President, 17 852 47 90, info@seth.pl

ZETO-RZESZÓW Sp. z o.o.

Orange Customer Service

(Rzeszów.)
HQ of parent company: Poland
Year started in Poland: 2010
Number of Employees: 5000
Services provided: Call center – TP S.A., PTK Centertel
Management in Poland: Jakub Kłoczewiak – President, Tomasz Dreslerski – Member of the Board

Carlson Wagonlit Travel

(Świlcza near Rzeszów)
HQ of parent company: France
Year started in Poland: 2008
Number of Employees: 140 (Rzeszów)
Services provided: Call center (business travel)

Szczecin

arvato Bertelsmann

HQ of parent company: Poland
Year started in Poland: 2004
Number of Employees: 270
Services provided: IT, lettershop, logistic contract center & back office, loyalty programs, financial services
Management in Poland: Tomasz Wasikowski

BL Stream Sp. z o.o.

HQ of parent company: Finland
Year started in Poland: 1999
Number of Employees: 147
Services provided: IT

Coloplast Shared Services Sp. z o.o.

HQ of parent company: Denmark
Year started in Poland: 2009
Number of Employees: 90
Services provided: Finance and Accounting
Management in Poland: Pan Allan Kjer

Contact Center Sp. z o.o.

HQ of parent company: France
Year started in Poland: 1999
Number of Employees: In Poland: 5915
Services provided: Telesales, sales support, databases, call centre, debt recovery, marketing research
Management in Poland: Zbigniew Biały – President of the Management Board

Gamelion Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 2002
Number of Employees: 85
Services provided: IT

GaveKal

Metro Group

Number of Employees: 250
Services provided: SSC

Metro Services PL

HQ of parent company: Germany
Number of Employees: 45 (200 planned)
Services provided: Finance and accounting

Nordic Consulting & Development Company

HQ of parent company: Denmark
Number of Employees: 58
Services provided: IT

Object Connect

HQ of parent company: Poland
Year started in Poland: 2008

Number of Employees: 25
Services provided: IT

Sonion

Stream Global Services

HQ of parent company: USA
Year started in Poland: 2005
Number of Employees: 280
Services provided: Call center
Management in Poland: Pan Enrico Kautz

Tieto Poland Sp. z o.o.

HQ of parent company: Finland
Year started in Poland: 2006
Number of Employees: May 2011- 1100 employees
Services provided: IT services, R&D services, Industry specific
Management in Poland: President – Wojciech Zaremba, wojciech.zaremba@tieto.com, 22 229 91 00; Vice President – Ireneusz Miski, ireneusz.miski@tieto.com, 48 71 774 03 00 /Member of the Board, HR Director: michal.szostkowski@tieto.com, 91 814 46 99

TietoEnator Sp. z o.o.

HQ of parent company: Finland
Year started in Poland: 1999
Number of Employees: 500
Services provided: IT
Management in Poland: Michał Szostkowski

Unicredit Business Partner

HQ of parent company: Italy
Year started in Poland: 2008
Number of Employees: 350
Services provided: Finance and Accounting
Management in Poland: Hans-Jürgen Sachs

Unizeto

HQ of parent company: Poland
Number of Employees: 204
Services provided: IT
Management in Poland: Andrzej Bendig-Wielowiejski

Warsaw

arvato services (branch of Bertelsmann Media Sp. z o.o.)

(Blonie near Warsaw)
HQ of parent company: Poland
Year started in Poland: 2005
Services provided: BPO – logistics, back office

3MC Poland Sp. z o.o.

Management in Poland: 22 243 69 75, info@3mc-poland.pl

7N

ABG SA

HQ of parent company: Poland
Services provided: IT

ABN Amro

HQ of parent company: Holland
Number of Employees: 150
Services provided: F&A, operations

Accenture

Axiom

ADDICO Sp.j. J.Górska i E.Szumlak

HQ of parent company: Poland
Management in Poland: 22 862 43 32

Adecco Poland Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 376 09 00, biuro.hg@adecco.com

ADP Poland

Aegon

Year started in Poland: 2008
Services provided: CC

Akademia Rozwoju Systemów Sieciowych Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 861 53 41, biuro@arss.com.pl

ARPI & Partners

Arteria

Asesco Poland Region Rzeszów

HQ of parent company: Poland
Management in Poland: 17 852 31 53, sekretariat@s2.pl

AstraZeneca Pharma Poland

HQ of parent company: UK
Number of Employees: 40
Services provided: R&D
Management in Poland: -

Atemis

HQ of parent company: USA
Services provided: IT

Athenasoft Sp. z o.o.

HQ of parent company: USA
Services provided: IT

ATT 2000 Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 408 33 17, att2000@att2000.pl

Autodesk SA

HQ of parent company: USA
Services provided: IT

Avon

HQ of parent company: Sweden
Number of Employees: 100
Services provided: F&A

Axel Springer

HQ of parent company: Germany
Number of Employees: 300
Services provided: CC, telemarketing

BanCom

HQ of parent company: Poland
Number of Employees: 180
Services provided: CC, telemarketing

Batex Biuro Rachunkowe

HQ of parent company: Poland
Management in Poland: 22 651 67 54

Betacom SA

HQ of parent company: USA
Services provided: IT

Billennium Sp. z o.o.

Services provided: IT
Management in Poland: Jacek Witkowski – Dyrektor Sprzedaży, 504 077 877, jwitkowski@billennium.pl

Bonair SA

HQ of parent company: Poland
Services provided: IT

BOŚ

Number of Employees: 30
Services provided: CC, telemarketing

BSH

Year started in Poland: 2007
Number of Employees: 117
Services provided: R&D

BST EURO-CENTRUM

HQ of parent company: Poland
Management in Poland: 502 569 054, biuro@world-brand.eu

Business Consulting Solutions

HQ of parent company: Poland
Management in Poland: 22 333 73 97, mail@bcs-solutions.pl

C-Land Sp. z o.o.

HQ of parent company: Poland
Services provided: IT

Call Center Poland

Management in Poland: BRE Bank in process of taking over

Capgemini Polska Sp. z o.o.

Year started in Poland: 1996
Number of Employees: 4,700, of which 2,600 BPO, 1,600 IOS, 500 R&D
Services provided: BPO: Finance & accounting, HR, Procurement, Customer care, ITO: Infrastructure outsourcing services, R&D: Software development
Management in Poland: Marek Grodziński (BPO), Daniel Habrat (IOS), Piotr Poprawski (Software Development)

Carrywater Group SA

HQ of parent company: Poland
Management in Poland: 22 630 66 55, biuro@carrywater.com

Centrum Gospodarczego Doradztwa Strategicznego Sp. z o.o.

HQ of parent company: Polska
Management in Poland: 22 620 22 08, i.perlinski@cgds.com.pl

Citibank Europe PLC Poland Branch

HQ of parent company: USA
Year started in Poland: 2005
Number of Employees: 240
Services provided: Banking operations, transaction processing, fund services
Management in Poland: Ewa Szpak, 22 690 16 61, ewa.anna.szpak@citi.com; Joanna Lewińska, 22 692 93 85, joanna.lewinska@citi.com

Comarch

Commercial Union Call center

HQ of parent company: UK
Number of Employees: 200
Services provided: CC, telemarketing

Communication Service Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 526 60 00, info@communication.com.pl

Comp SA

HQ of parent company: Poland
Management in Poland: 22 570 38 00, info@comp.com.pl

Computer Associates Sp. z o.o.

HQ of parent company: USA
Services provided: IT

Compuware

HQ of parent company: USA
Number of Employees: 160
Services provided: Business support, BI

Comtica Sp. z o.o.

HQ of parent company: Poland
Services provided: IT

Contact Center sp. z o.o.

HQ of parent company: France
Year started in Poland: 1999
Number of Employees: In Poland: 5915
Services provided: Telesales, sales support, databases, call centre, debt recovery, marketing research
Management in Poland: Zbigniew Biały – President of the Management Board

ContactPoint

CTM Teleperformance

dcs.pl Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 548 60 00, sales@dcs.pl

BPO/SSC Companies in Poland

Deloitte

HQ of parent company: Poland
Management in Poland: 22 511 08 11, dpoland@deloitteCE.com

DHL Express

HQ of parent company: Germany
Number of Employees: 300
Services provided: CC

Diehl Controls

HQ of parent company: Germany
Services provided: F&A

Dimar

Number of Employees: 60
Services provided: CC, telemarketing, operations

Direct Communication Sp. z o.o.

HQ of parent company: Poland
Services provided: IT

Dynamic Generation

Epicor Software

HQ of parent company: USA
Services provided: IT

Esselte

Euro-in i Partnerzy Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 818 26 00, ba@euroin.pl

Ever Grupa Sp. z o.o.

HQ of parent company: Poland

Warsaw

Blindness no barrier to employment at Polish call centre: The steady hum of chatter and the clickety-clack of computer keyboards makes it sound like any other call centre but at this Warsaw market research firm, blindness is no barrier to employment. The operation runs so smoothly that people on the other end of the phone line have no idea that they're dealing with the visually impaired. And thanks to new technology, the job gets done without a hitch.

"When you click on an icon, the computer tells you what it is. A sighted person can read it while we can hear it," said employee Lukasz Chmielewski.

Set up in 2010, the small firm called Quality Cube has 15 employees including 12 who are blind, expanding – if minimally – the limited pool of jobs for the visually impaired in Poland.

"These people are the best employees," said company co-founder Marcin Gic. "They are the most loyal. They never take sick days or take a day off because they partied too much the night before, so it's very positive."

Gic sees Quality Cube as a "real business", not a charity. He concedes it took some investment to adapt the office to the needs of blind employees but said it was well worth it and expects to turn a profit in 2012. ■

Management in Poland: 22 864 06 74, recepcja@grupaever.com.pl

Evercom

HQ of parent company: Poland
Management in Poland: 22 678 01 12, evercom@evercom.pl

Exorigo Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 551 45 82, sekretariat@exorigo.pl

Extor Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 586 11 86, info@extor.pl

Fingroup Polska Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 895 19 95, kontakt@fingroup.com.pl

FK SERWIS Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 692 19 56, i.blachut@fkserwis.pl

FPA Group

GBI Spółka Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 458 66 10, info@gbip.com.pl

GDF IT Consulting Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 847 00 91, info@gdfit.pl

Gemius

HQ of parent company: Poland
Number of Employees: 35
Services provided: Insurance software development

General Electric

HQ of parent company: USA
Number of Employees: 300
Services provided: R&D, design

GlaxoSmithKline

Year started in Poland: 2005
Number of Employees: 18
Services provided: IT, CRM systems

GM

HQ of parent company: Poland
Management in Poland: mpw1@tlen.pl

Grant Thornton Frąckowiak Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 1993
Number of Employees: 250
Services provided: HR, accounting, tax advisory, consulting
Management in Poland: Katarzyna Banach – Managing Partner; 61 625 1391, Agnieszka Chwalińska – Partner; Magdalena Marciniowska – Partner

Groupe Laser

HQ of parent company: France
Number of Employees: 50
Services provided: Contact Centre

Grupa Marketingowa TAI Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 612 12 60, kontakt@tai.com.pl

Gtech (Lottomatica)

HQ of parent company: Italy
Number of Employees: 94
Services provided: ICT software development

Guest-Tek

HQ of parent company: Canada
Number of Employees: 60
Services provided: ICT management
Management in Poland: -

Healthcare Consultants Poland Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 499 50 50, info@healthcare.pl

Heuthes Sp. z o.o.

HQ of parent company: Poland
Services provided: IT
Management in Poland: -

Hewitt Associates Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 696 52 20, warsaw.crc@hewitt.com

Hewlett-Packard Sp. z o.o.

HQ of parent company: USA
Services provided: IT
Management in Poland: -

Hogart Sp. z o.o.

HQ of parent company: USA
Services provided: IT

Hudson Sp. z o.o.

Management in Poland: 56 621 01 10, torun.sekretariat@hudson.com

IBM

HQ of parent company: USA
Number of Employees: 450+
Services provided: Complex services for business clients; Operations back-up center; Data mgmt outsourcing

IDS Scheer Polska Sp. z o.o.

Services provided: +48 22 3181901
Management in Poland: 22 318 19 00, office@ids-scheer.pl

IFS

HQ of parent company: Sweden
Number of Employees: 93
Services provided: IT support, software development

IMPAQ Sp. zo.o.

HQ of parent company: Germany
Services provided: IT

Intentia

HQ of parent company: Sweden
Services provided: IT

Inter Partner Assistance

Number of Employees: 30
Services provided: CC, telemarketing

Intergraph Europe

HQ of parent company: USA
Services provided: IT

IQFM Sp. z o.o.

Management in Poland: 22 895 26 10, iqfm@iqfm.pl

IT Business Centre

Management in Poland: 22 814 16 26, info@itbc.com.pl

IT Business Consulting Group Sp. z o.o.

Management in Poland: 22 444 17 00, itbcg@itbcg.pl

IT ECS Sp. z o.o.

Management in Poland: 22 652 22 42, biuro@itecs.pl

Itella Information Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 1997
Number of Employees: 230
Services provided: finance
Management in Poland: Miikka Savolainen – Managing Director, miikka.savolainen@itella.com, mobile 512 363 137

Jones Lang LaSalle Group Services Sp z o.o.

Year started in Poland: 2007
Number of Employees: 87
Services provided: Usługi finansowe

Manager's Profile

Beata Skawińska

*Citibank International Plc, Poland Branch
Warsaw, Olsztyn, Łódź
Headquarters (global): New York
Branch Representative
beata.skawinska@citi.com*

Operations in Poland

In 2005 two new Citi entities were established in Poland - Citibank International Plc and Citibank Europe Plc, both operating under Citi Service Center (CSC) brand. It is an initiative to create a network pro-

CSC Poland provides services to more than 60 countries across Europe, Asia, Africa, both Americas and Australia. Our employees use more than 24 languages every day.

How has your business changed - in terms of services provided - over the years?

Our Center has evolved in line with the outsourcing sector in Poland. When we started in 2005 we employed only 57 employees and supported our partners from Central and Eastern Europe. Now we have almost 1800 employees and work with our partners from all over the world. From year to year, we have been migrating more

ment to changes and incredible linguistic talents. I believe that having such people capital helps us to become a global Knowledge Processing Offshoring center.

Employee issues:

We are constantly improving our People Strategy. One of our important initiatives is to be recognized as an employer of choice. For the second consecutive year we were certified with Top Employer Award by CRF Institute. We are especially proud that we received the highest scores in "Additional Benefits and Employment Conditions", "Professional Training and Development" and "Professional Career Development". Additionally, our organization culture was also ranked very high.

Our employees are very engaged in working for local societies. Through the Kronenberg Foundation, Citi organizes the biggest national and local programmes, reflecting the social responsibility of our organization. Citi is involved in Corporate Community Investment (CCI), which is expressed mainly in the programs of Volunteer Staff, Grants and Financial Education. Under these programs, the Foundation supports activities for the public good in education, local development and protection of cultural heritage.

Positive surprises – and critiques – of operating in Poland:

I think the most important thing in Poland is the excellent talent pool. Another positive thing of operating in Poland is that companies from outsourcing sector cooperate under the Association of Business Service Leaders in Poland (ABSL). There are more than 50 ABSL members from foreign and Polish investors. ABSL initiates a number of activities aimed at stimulating further growth of business services sector as well as increasing Poland's investment attractiveness on the international scene.

However we still wish to have more support from our authorities. We understand that in the current economic situation in Europe it is very difficult to decide to support such centers as ours. We believe that this is the best way to develop the Polish economy. Foreign companies bring innovation, state-of-art solutions and transfer knowledge to Poland.

Did subsidies/grants/incentives from Polish authorities play a role in your decision to set up in Poland?

We received governmental grant after five years of our presence in Poland. It is strong point when we have discussion with our partners about further development and also from PR perspective. ■



viding high quality services to other Citi entities. We are seventh out of about 400 such centers operating globally within Citi. "Our sign on the door" is monitoring anti-money laundering, back-office banking operations, securities and investment funds operations and technology infrastructure.

complex functions (for example: fund accounting, advanced statistical modeling and telepresence support). We manage to hire talent from the market and universities. We invest in their development and skills and build their expert knowledge. I can see their positive energy, easy adjust-

BPO/SSC Companies in Poland

Management in Poland: Marta Rejman, 22 318 00 40, marta.rejman@eu.jll.com

Lawson Software

HQ of parent company: UK
Services provided: IT

Liberty Mutual

HQ of parent company: USA
Number of Employees: 70
Services provided: CC, telemarketing

Lionbridge

HQ of parent company: USA
Number of Employees: 200
Services provided: Testing, location, software development

Logitel sp. z o.o.

Management in Poland: 22 339 38 80, logitel@logitel-polska.pl

Macrologic SA

HQ of parent company: Poland
Services provided: IT

MAD System Sp.j. D.Dziewanowski, M.Grzybowski

Management in Poland: 22 696 44 77, office@madsystem.com.pl

Management Data Systems Sp. z o.o.

Management in Poland: 22 571 24 50, kontakt@mds.com.pl

Matrix.pl SA

HQ of parent company: Poland
Services provided: IT

McKinsey & Company Poland Sp. z o.o.

Management in Poland: 22 8205700

MCX Systems Sp. z o.o.

HQ of parent company: Poland
Services provided: IT

Mellon

HQ of parent company: USA
Year started in Poland: 2006
Number of Employees: 834
Services provided: IT, Call center, Outsourcing
Management in Poland: Gregorios Kotoulas, 22 572 53 00, g.kotoulas@mellon.com.pl

Microsoft Sp. z o.o.

HQ of parent company: USA
Services provided: IT

Mobica

HQ of parent company: UK
Number of Employees: 70
Services provided: IT

NextiraOne Polska

Management in Poland: 22 553 55 00, nextiraone@nextiraone.pl

OSG Records Management

Services provided: Archiving
Management in Poland: 22 533-2990

Outsourcing Experts

Year started in Poland: 2011
Number of Employees: 10000
Services provided: Procesy zarządzania dokumentami i back-office, procesy wsparcia sprzedaży i marketingu, procesy call i contact center
Management in Poland: Konrad Rochalski, Artur Wojtaszek, Tomasz Słowiński

P4 PlayMobile

HQ of parent company: Poland
Number of Employees: 54
Services provided: CC, telemarketing

Partner Holding Management Sp. z o.o.

Management in Poland: 22 835 84 52, kontakt@partnerholding.pl

PayrollCenter

PBS Polska Sp. z o.o.

HQ of parent company: Poland
Management in Poland: 22 870 06 06, info@pbspolska.com.pl

Pharmaceutical Research Associates

HQ of parent company: USA
Number of Employees: 22
Services provided: Clinical research

PLL LOT

HQ of parent company: Poland
Number of Employees: 60
Services provided: CC

Process Solutions Sp. z o.o.

Services provided: BPO
Management in Poland: 22 695 02 95, info-pl@ps-bpo.com

Procter&Gamble

HQ of parent company: USA
Number of Employees: 200
Services provided: IT

Progress Software Sp. z o.o.

HQ of parent company: USA
Services provided: IT

Prokom Software SA

HQ of parent company: Poland
Services provided: IT

Provident Poland

HQ of parent company: UK
Number of Employees: 420
Services provided: CC, telemarketing

PTC

HQ of parent company: Poland
Number of Employees: 1650
Services provided: CC

PTK Centertel

HQ of parent company: Poland
Number of Employees: 1750
Services provided: CC

PZU Centrum Operacji

Qumak-Sekom SA

HQ of parent company: Poland
Services provided: IT

Randstad Payroll Solutions Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 1998
Number of Employees: 50
Services provided: Payroll and HR file administration
Management in Poland: Katarzyna Plucinska – Managing Director

RBS

HQ of parent company: Holland
Number of Employees: 620
Services provided: SSC: F&A+IT

Renault

Year started in Poland: 1996
Number of Employees: 28
Services provided: Training, consulting

Roche

HQ of parent company: Szwajcaria
Number of Employees: 220
Services provided: Software development

Rodan Systems SA

HQ of parent company: Poland
Services provided: IT

Roedl Outsourcing

RR Donnelley Document Solutions Sp. z o.o.

Management in Poland: 22 820 93 00

S&T Services Poland Sp. z o.o.

HQ of parent company: Austria
Services provided: IT

Samsung Electronics Poland

HQ of parent company: South Korea
Number of Employees: 200
Services provided: Software development for ICT&TV SAT

SAS Institute

HQ of parent company: USA
Number of Employees: 30
Services provided: BI

Sellpoint Sp. z o.o.

Services provided: Sales force outsourcing
Management in Poland: 22 482 02 86, piotr.wojtowski@sellpoint.pl

Sii Sp. z o.o.

Year started in Poland: 2006
Number of Employees: 900
Services provided: IT, new technologies
Management in Poland: Gregoire Nitot, 22 486 37 37, informacja@pl.sii.eu

Simple SA

HQ of parent company: Poland
Services provided: IT

Sitel

HQ of parent company: USA
Number of Employees: 450
Services provided: CC, telemarketing

Softomasz S.c.

Services provided: IT solutions for business
Management in Poland: 22 576 82 00, biuro@softomasz.pl

Sygnity

HQ of parent company: Poland
Number of Employees: 40
Services provided: Management process support

Symantec

HQ of parent company: USA
Number of Employees: 13
Services provided: IT tech support
Management in Poland: -

Tieto Poland Sp.z o.o.

HQ of parent company: Finland
Year started in Poland: 2006
Number of Employees: about 1100 employees
Services provided: IT services, R&D services, Industry specific
Management in Poland: President – Wojciech Zaremba, wojciech.zaremba@tieto.com, 22 229 91 00;

TIM Outsourcing Piotr Kałużny Sp.k.

Management in Poland: 22 203 30 00, info@timoutsourcing.com

TMF Polska Sp. z o.o.

Management in Poland: 22 456 45 00, TMF.Poland@tmf-group.com

Transition Technologies SA

Management in Poland: 22 331 80 20, tt@tt.com.pl

Update CRM Sp. z o.o.

HQ of parent company: Austria
Services provided: IT

Wapro Sp. z o.o.

HQ of parent company: Poland
Services provided: IT



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BPO/SSC Companies in Poland

Warsaw Software Group Sp. z o.o.

HQ of parent company: Poland
Services provided: IT

Webtel Sp. z o.o.

HQ of parent company: Poland
Services provided: IT

Wipro Poland Sp. z o.o.

Year started in Poland: 2008
Number of Employees: 300
Services provided: BPO F&A, BPO HRO, IT Development Centre, SAP applications support, Banking BPO services
Management in Poland: Robert Góra, 795 165 821, robert.gora@wipro.com

Xerox

HQ of parent company: USA
Number of Employees: 50
Services provided: Document processing
Management in Poland: -

BLOOMING Technologies Sp. z o.o.

(Warsaw, Latchorzew)
HQ of parent company: Poland
Management in Poland: 22 215 34 11, office@blooming.pl

Asseco Business Solutions SA

(Warsaw, Piaseczno)
HQ of parent company: Poland
Management in Poland: 22 702 89 00, info@assecob.pl

Inforsys SA

(Warsaw, Radzymin)
Management in Poland: 22 545 31 00, biuro@inforsys.pl

Wrocław

Geoban S.A. SA Oddział w Polsce

HQ of parent company: Spain
Year started in Poland: 2008
Number of Employees: 600
Services provided: Banking operations – Santander group shared services
Management in Poland: Raimo Kesti – General Manager, rkesti@geoban.es, mobile: 519 517 574

Global e-Business Operations Sp. z o.o.

(Hewlett-Packard)
HQ of parent company: USA
Year started in Poland: 2005
Number of Employees: 2100
Services provided: Advanced Business Services including: Finance & Administration, HR, Procurement Administration, Marketing
Management in Poland: Maxime Jouan – maxime.jouan@hp.com

Randstad Payroll Solutions Sp. z o.o.

HQ of parent company: Poland
Year started in Poland: 1998

Wrocław

BNY Mellon: In spring 2012, BNY Mellon announced plans to open a new Global Delivery Centre in Wrocław, where staff will work in highly skilled roles mainly in the areas of fund accounting and investment operations. “Poland is a central location within Europe, offering high-quality staff and infrastructure, coupled with attractive economics and financial incentives,” said Michael Cole-Fontayn, chairman of Europe, Middle East & Africa. The firm will employ about 90 people from the beginning and could increase to even 500 employees. ■

Number of Employees: 50
Services provided: Payroll and HR file administration
Management in Poland: Sylwester Czarnecki – Senior Sales Manager, sylwester.czarnecki@pl.randstad.com, mobile: 697 544 344; Katarzyna Plucinska – Managing Director, katarzyna.plucinska@pl.randstad.com, mobile: 512 352 179

Atos

HQ of parent company: Germany
Services provided: R&D IT (Software development)

Becton Dickinson

HQ of parent company: USA
Services provided: BPO

BNY Mellon

HQ of parent company: USA
Number of Employees: 100 people + expansion plans
Services provided: SSC

Capgemini Software Solution Centre

HQ of parent company: France
Year started in Poland: 2006
Number of Employees: 400
Services provided: Software Development
Management in Poland: Piotr Poprawski

Central Europe BPO

HQ of parent company: USA

Credit Safe

Number of Employees: 50
Services provided: R&D in Financial

Diehl Controls

HQ of parent company: Germany
Number of Employees: 65
Services provided: R&D (Whitegoods)
Management in Poland: -

Dolby

HQ of parent company: USA
Number of Employees: 100
Services provided: R&D

Ernst&Young

Year started in Poland: 2011
Number of Employees: 200
Services provided: Finance
Management in Poland: Dariusz Sus, 883 326 888

Fagor Mastercook

HQ of parent company: Spain
Services provided: R&D (Whitegoods)
Management in Poland: -

getsix Sp. z o.o.

Year started in Poland: 2004
Number of Employees: 50
Services provided: Accountancy, Finance, IT Systems, Consulting –especially targeting German clients
Management in Poland: Monika Martynkiewicz-Frank, 71 388 13 00, monika.frank@getsix.pl; Claus Frank, 71 388 13 00, claus.frank@getsix.pl; Roy Heynlein, 61 668 34 00, roy.heynelein@getsix.pl

Globalne Centrum Biznesowe HP (Global e-Business Operations sp. z o.o.)

HQ of parent company: USA
Year started in Poland: 2005
Number of Employees: 2500
Services provided: F&A, HR, Payroll processing, Marketing, Zarządzanie łańcuchem dostaw
Management in Poland: Agnieszka Orłowska, Agata Dopieralska, Jacek Roslan

Google

HQ of parent company: USA
Number of Employees: 100
Services provided: Operation / innovation center
Management in Poland: -

Hamilton Sundstrand

HQ of parent company: USA
Services provided: R&D

IBM Global Services Delivery Centre Poland Sp. z o.o.

HQ of parent company: USA
Year started in Poland: 2010
Number of Employees: 2000
Services provided: SSC IT
Management in Poland: Bogusław Łopuch, 71 338 62 00, fax 71 338 62 01, boguslaw.lopuch@pl.ibm.com, ul. Muchoborska 8, 54-424 Wrocław

Irevna

HQ of parent company: India
Number of Employees: Planned 100
Services provided: KPO Center (Mathematics)

KPIT Cummins

HQ of parent company: India
Number of Employees: 40
Services provided: Accounting Center

McKinsey&Company

HQ of parent company: USA
Number of Employees: Planned 100
Services provided: KPO

Mphasis

HQ of parent company: India
Services provided: HR, Accounting

Networks

HQ of parent company: Finland
Number of Employees: 900
Services provided: IT R&D

Nokia Siemens Networks

HQ of parent company: Finland
Number of Employees: 900
Services provided: IT R&D

Opera Software

HQ of parent company: Norway
Number of Employees: 150
Services provided: IT R&D

PNC (PFPC)

HQ of parent company: USA
Number of Employees: 200
Services provided: BPO (Finance)

QAD

HQ of parent company: USA
Number of Employees: 50
Services provided: IT service center

Remy International

HQ of parent company: USA
Services provided: R&D (Automotive)

Research & Engineering Center Sp. z o.o.

Year started in Poland: 2007
Number of Employees: 222
Services provided: IT, Software development services
Management in Poland: Krzysztof Kuliński, Małgorzata Rak, Seweryn Krajewski

Ruukki

HQ of parent company: Finland
Number of Employees: 50
Services provided: BPO

Santander Consumer Bank

HQ of parent company: Spain
Number of Employees: Planned 300
Services provided: BPO

Siemens AG

HQ of parent company: Germany
Number of Employees: 50
Services provided: R&D IT (Software)

Tieto Poland Sp. z o.o.

HQ of parent company: Finland
Year started in Poland: 2006
Number of Employees: May 2011- 1100 employees
Services provided: IT services, R&D services, Industry specific



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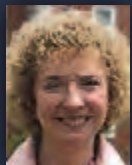
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Dr. Robert Reich

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BPO/SSC Companies in Poland

Management in Poland: President – Wojciech Zaremba,
wojciech.zaremba@tieto.com, 22 229 91 00

UPS

HQ of parent company: USA
Number of Employees: 316
Services provided: Accounting

Volvo

HQ of parent company: Sweden
Number of Employees: 500 (100 in IT)
Services provided: Accounting, administration, IT

Wabco

HQ of parent company: USA
Number of Employees: 40
Services provided: R&D (Automotive)

Whirlpool

HQ of parent company: USA
Number of Employees: 100
Services provided: R&D (Whitegoods)

Wipro

HQ of parent company: India
Number of Employees: 150
Services provided: HR Service Center

Center of Excellence CREDIT SUISSE (Poland) Sp. z o.o.

(Wrocław, Dolny Śląsk)
HQ of parent company: Szwajcaria
Year started in Poland: 2007
Number of Employees: 564
Services provided: Finance & Accounting, HR, Procurement, Customer Service, Financial Services, KPO, IT Support, Reporting, Design & Publishing Services
Management in Poland: COE Center Manager, Erich Niederhäuser, erich.niederhaeuser@credit-suisse.com; PB COO Center Manager, Andre Lorenz, andre.lorenz@credit-suisse.com; HR Center Head – Regula Vijgenboom Ask, regula.vijgenboom@credit-suisse.com

Other

Intrum Justitia

(Białystok)
HQ of parent company: Sweden
Services provided: Call Center

Contact Center Liberty

(Bytom)
Management in Poland: Łukasz Skiba – Koordynator Projektów Zewnętrznych, lukasz.skiba@liberty.eu

LG Electronix

(Ciechanów)
HQ of parent company: South Korea
Services provided: R&D

Contact Center sp. z o.o.

(Ciechanów, Tczew, Rawa Mazowiecka, Elbląg, Krosno, Sosnowiec)
HQ of parent company: France
Year started in Poland: 1999
Number of Employees: In Poland: 5915
Services provided: Telesales, sales support, databases, call centre, debt recovery
Management in Poland: Zbigniew Biały – President

TRW Automotive

(Częstochowa)
HQ of parent company: USA
Year started in Poland: 2007
Number of Employees: 190
Services provided: Accounting services
Management in Poland: Robert Glowacki, 34 390 26 00, robert.glowacki@trw.com

Alstom

(Elbląg)

InfoPower Sp. z o.o.

(Elbląg)
HQ of parent company: Poland

Year started in Poland: 2000

Number of Employees: 40
Services provided: IT Service, Help Desk, Data Center, Call Center, Office Services, Financial and Accounting, Personnel and Payroll

Management in Poland: Jacek Makarewicz – President of the Board, jacek.makarewicz@infopower.pl; Jerzy Olszewski – V-President of the Board

OPEGIEKA Sp. z o.o.

(Elbląg)
HQ of parent company: Poland
Year started in Poland: 1989
Number of Employees: 100
Services provided: GIS Center, Data Center, Centre for Security and Recovery, IT Service
Management in Poland: Florian Romanowski – President of the Board, Adam Augustynowicz – V-President of the Board, adam.augustynowicz@opegieka.pl

Faurecia

(Grójec)
HQ of parent company: France
Number of Employees: 100
Services provided: R&D

Philips

(Kętrzyn)
HQ of parent company: The Netherlands
Services provided: R&D

arvato services (branch of Bertelsmann Media Sp. z o.o.)

(Konin)
HQ of parent company: Poland
Year started in Poland: 2010
Services provided: BPO – telesales

Calling Poland

(Mierzyno)
HQ of parent company: Poland
Services provided: Call Center

Sonion

(Mierzyno)
HQ of parent company: Denmark
Services provided: F&A

TP S.A.

(Mierzyno)
HQ of parent company: France
Services provided: Call Center

Cooper-Standard

(Myslenice)
HQ of parent company: USA
Services provided: R&D

CITI Group

(Olsztyn)
HQ of parent company: USA
Year started in Poland: 2000
Number of Employees: About 450
Services provided: Finance
Management in Poland: Tomasz Drapiński – Director

France Telecom

(Olsztyn)
HQ of parent company: France
Services provided: Call center
Management in Poland: Telekomunikacja Poland S. A.

Phillips

(Piła)
HQ of parent company: The Netherlands
Services provided: R&D

Humax

(Puszcza Gdańska)
HQ of parent company: South Korea
Services provided: R&D

Goyello

(Sopot)
HQ of parent company: Holland

Number of Employees: 40

Services provided: IT
Management in Poland: Peter Horsten – CEO

Sitel

(Tarnowskie Góry)
HQ of parent company: Poland
Number of Employees: 11
Services provided: BPO Call Centre
Management in Poland: Danuta Paruzel – President

Itella Information Sp. z o.o.

(Toruń)
HQ of parent company: Poland
Year started in Poland: 2005
Number of Employees: 100
Services provided: Finance, IT
Management in Poland: Miikka Savolainen – Managing Director, miikka.savolainen@itella.com, tel. +48 512 36 3137

Orange

(Tychy)
Number of Employees: 100-200
Services provided: SSC

ABD

(Zielona Góra)

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