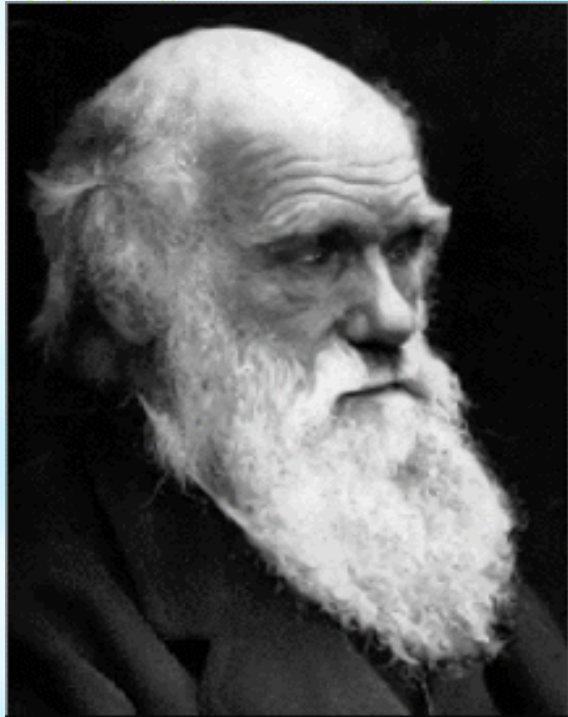


## **What are the opportunities for Polish companies?**

September 20<sup>th</sup>, 2012

# The business challenges companies face



Charles Darwin

1809-1892

It is not the strongest species,  
nor the most intelligent that  
survive, but the ones that are  
**most adaptive to change.....**

# SSC – the principals

**A Shared Service Centre or BPO strategy will result in three different types of benefit**



**Cost Savings**

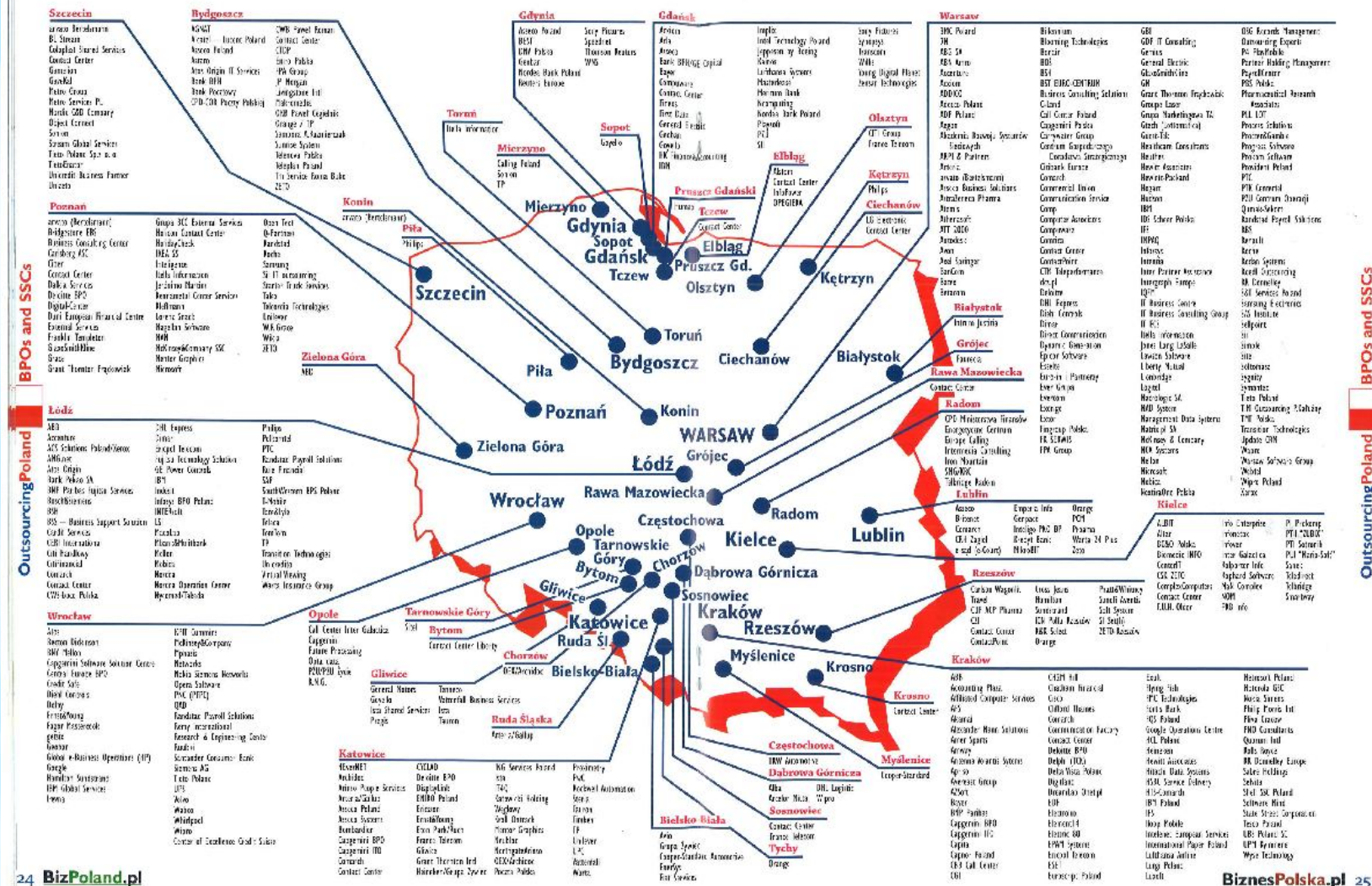
**Improvements in Quality and Customer Service**

**Strategic Benefits**



# SSC/BPO in Poland

## Outsourcing, BPO and Shared Services Centers in Poland



# So what is happening in Poland?

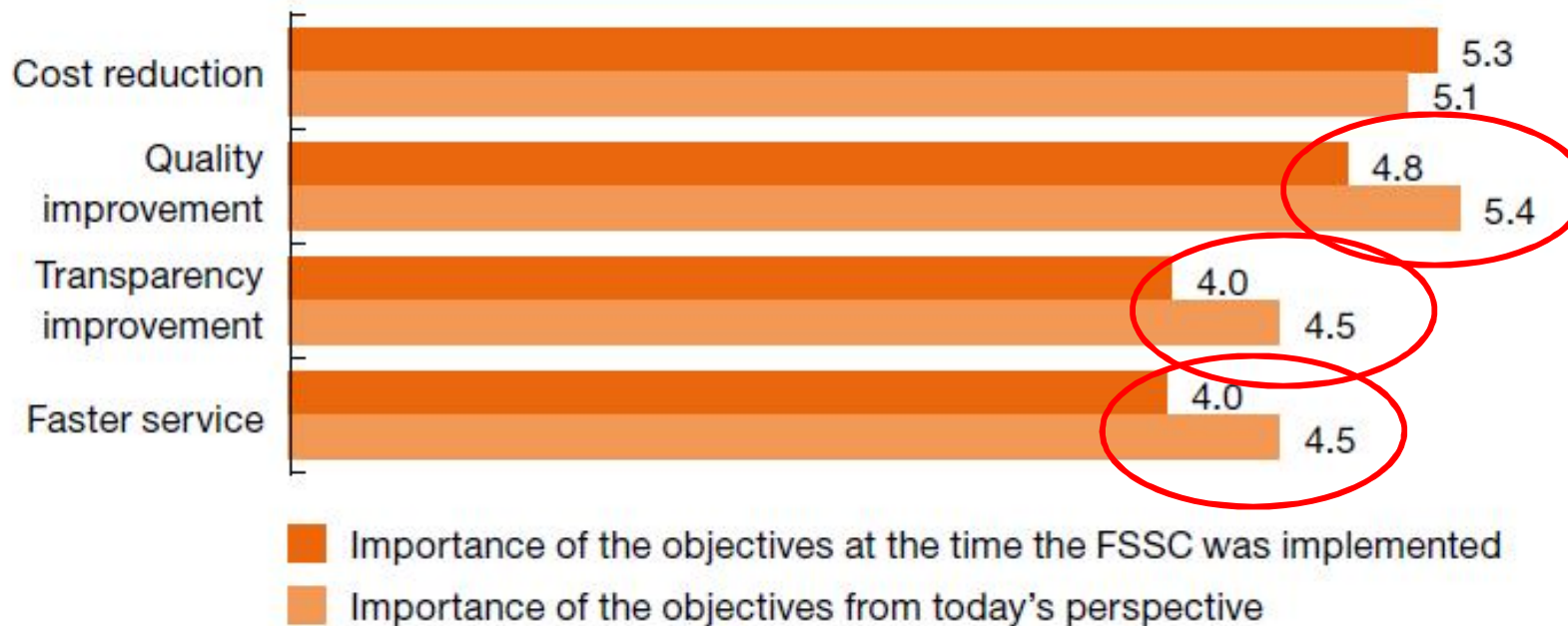
**I see three distinct markets/opportunities:**

1. **Multinationals setting up regional SSC/BPO in Poland**
2. Polish Companies setting up in Poland
3. Government centralising



# Initially international companies also thought it was all about cost.....

**Fig. 7** Comparison of the importance given to objectives before FSSC implementation and today



# It's not all about cost!

- **Flexibility and scalability** of operations
- Providing a better service through **unified process** and technology.
- Better **transparency of processes**, ensuring compliance with internal & external requirements and consistent controls
- **Smart** employees
- Great **work ethic**
- **Problem solving**
- **Ready for more**

# So what is happening in Poland?

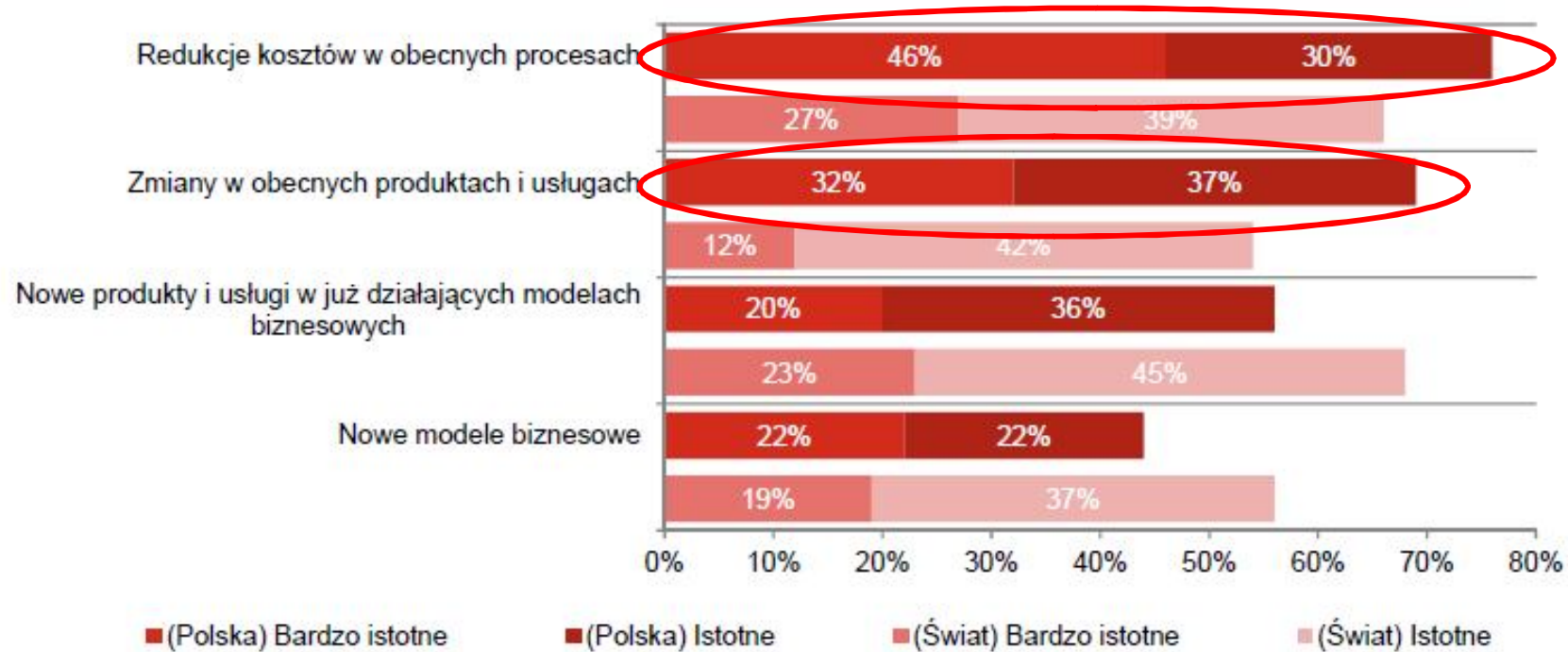
## Three distinct markets/opportunities:

1. Multinationals setting up regional SSC/BPO in Poland
2. **Polish Companies setting up in Poland**
3. Government centralising



# Polish CEOs are looking for ways to reduce their current process costs...

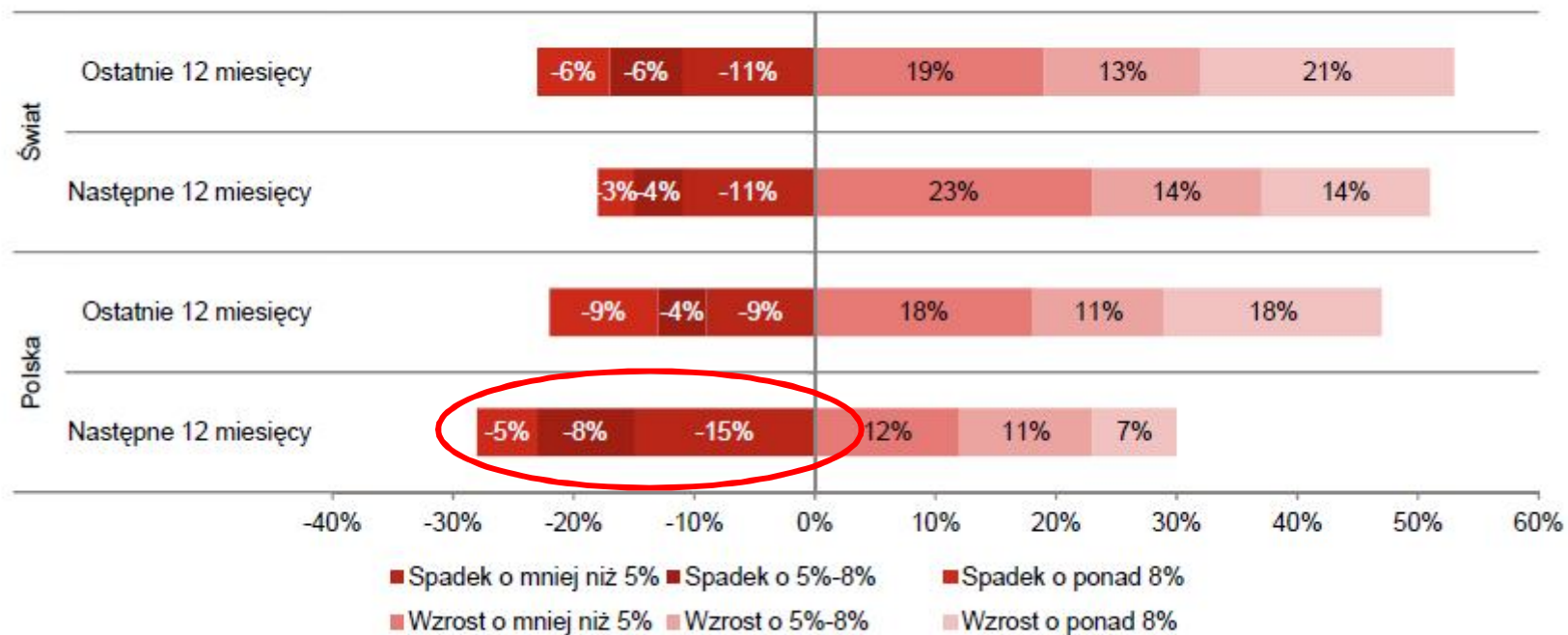
Waga przypisywana procesom innowacyjnym w poszczególnych dziedzinach (% odpowiedzi)



Źródło: Badanie własne PwC

# Staff reductions are expected in a third of Polish organisations in the next 12 months

Historyczna i oczekiwana zmiana liczby pracowników (% odpowiedzi)



Źródło: Badanie własne PwC

Source: PwC CEO survey 2012

# Polish CEOs are looking for ways to reduce their current process costs...

- Multiple entities and operations, often with **inefficient** /redundant processes and functions
- Too many people in too **many locations**
- Is SSC the **new norm**?
- Largest companies (TPSA, PKN Orlen, KGHM, Biedronka, Ruch, etc) all have SSC's
- Increase in interest.....**definitely**,
- Polish Outsourcers growing in number and size



# So what is happening in Poland?

## I see three distinct markets/opportunities:

1. Multinationals setting up regional SSC/BPO in Poland
2. Polish Companies setting up in Poland
3. **Government centralising**

**It is going to happen, the only question is when..... not if.**



**Romek Lubaczewski** – PwC CEE SSC/BPO Leader for CEE

- 17 years in the business
- Worked on more than 50 SSC/BPO projects in Europe, US and AsiaPac



**Andrzej Arendarski** – President of the Polish Chamber of Commerce

- co-founder and president of the Polish Chamber of Commerce since its creation
- Chairman of Polish-American Advisory Foundation for Small Enterprises



**Wojciech Szczepanik** - VP, Malopolska Regional Development Agency

- expert in Regional Financing Institutions
- For five years professionally linked with institutions supporting the business community; presently overseeing the Business in Małopolska Center.



**Oktawian Jaworek** - Director Projects and M&A, RUCH

- He has been involved in creating Centrum Usług Księgowych RUCH S.A. in Katowice (250 employees)




**Dymitr Doktor** - Editor in Chief, Outsourcing&More

- Managing Director of “Riposta” Marketing Agency.
- Founder of OutsourcingPortal.pl – outsourcing industry internet platform



**Piotr Rutkowski** - Managing Partner, SourceOne Advisory

- In IT business for over 17 years
- He participated in sales and implementation for the largest outsourcing projects in Poland.



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