



Where in Central & Eastern Europe?

VIII Polish Outsourcing Forum
25th April, Bangalore

There is clearly dominant country globally

Tholons 2013	City
# 1	Bangalore
# 2	Mumbai
# 3	Manila
# 4	Delhi
# 5	Chennai
# 6	Hyderabad
# 7	Pune
# 8	Cebu City
# 9	Dublin
# 10	Kraków

India's position a global leader is unquestionable

What is the position of CEE cities?

# 1	Bangalore
# 2	Mumbai
# 3	Manila (NCR)
# 4	Delhi (NCR)
# 5	Chennai
# 6	Hyderabad
# 7	Pune
# 8	Cebu City
# 9	Dublin
# 10	Kraków
# 11	Shanghai
# 12	Beijing
# 13	San José
# 14	Shenzhen
# 15	Dalian (Dairen)
# 16	Ho Chi Minh
# 17	Prague
# 18	São Paulo
# 19	Kuala Lumpur
# 20	Colombo
# 21	Santiago
# 22	Johannesburg
# 23	Hanoi
# 24	Buenos Aires
# 25	Chandigarh

# 26	Kolkata
# 27	Curitiba
# 28	Budapest
# 29	Coimbatore
# 30	Brno
# 31	Singapore
# 32	St. Petersburg
# 33	Toronto
# 34	Chengdu
# 35	Guangzhou
# 36	Warsaw
# 37	Montevideo
# 38	Rio de Janeiro
# 39	Jaipur
# 40	Mexico City
# 41	Belfast
# 42	Monterrey
# 43	Brasília
# 44	Bucharest
# 45	Accra
# 46	Tianjin
# 47	Bratislava
# 48	Guadalajara
# 49	Bogotá
# 50	Sofia

# 51	Tallinn
# 52	Ljubljana
# 53	Medellin
# 54	Bhubaneswar
# 55	Kyiv
# 56	Moscow
# 57	Casablanca
# 58	Cairo
# 59	San Juan
# 60	Halifax
# 61	Jakarta
# 62	Nizhniy Novgorod
# 63	Lima
# 64	Cork
# 65	Glasgow City
# 66	Thiruvananthapuram
# 67	Xi'an
# 68	Cape Town
# 69	Ahmedabad
# 70	Davao City
# 71	Córdoba
# 72	San Antonio, Texas
# 73	Penang
# 74	Istanbul
# 75	Wroclaw

# 76	Taipei
# 77	Alexandria
# 78	Recife
# 79	Birmingham, Alabama
# 80	Bucaramanga
# 81	St. Louis, Missouri
# 82	Leeds
# 83	Bangkok
# 84	Santa Rosa, Laguna
# 85	Valparaíso
# 86	Seoul
# 87	Perth
# 88	Port Louis
# 89	Lviv
# 90	Asunción
# 91	Campinas
# 92	Novosibirsk
# 93	Iloilo City
# 94	Bacolod City
# 95	Managua
# 96	Guatemala City
# 97	Nairobi
# 98	Cali
# 99	Baguio City
# 100	Zagreb

- Cities in the region spread across the top 100
- No country in CEE dominates

Poland

Czech Republic

Slovakia

Hungary

Romania

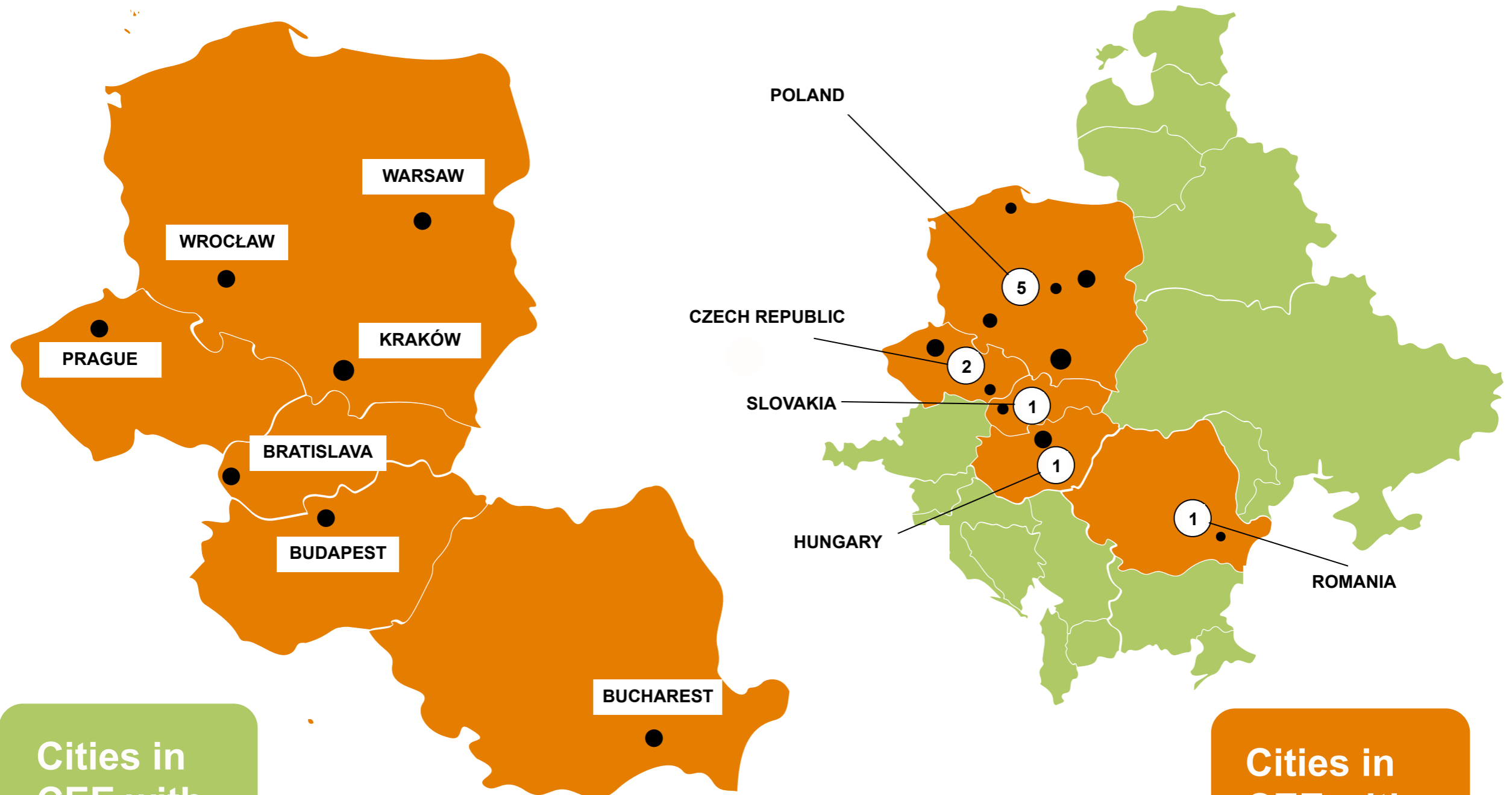
Bulgaria

Balkans

Ukraine, Baltics

Cost: Average Salary in selected EU countries (point scale) 2010 data

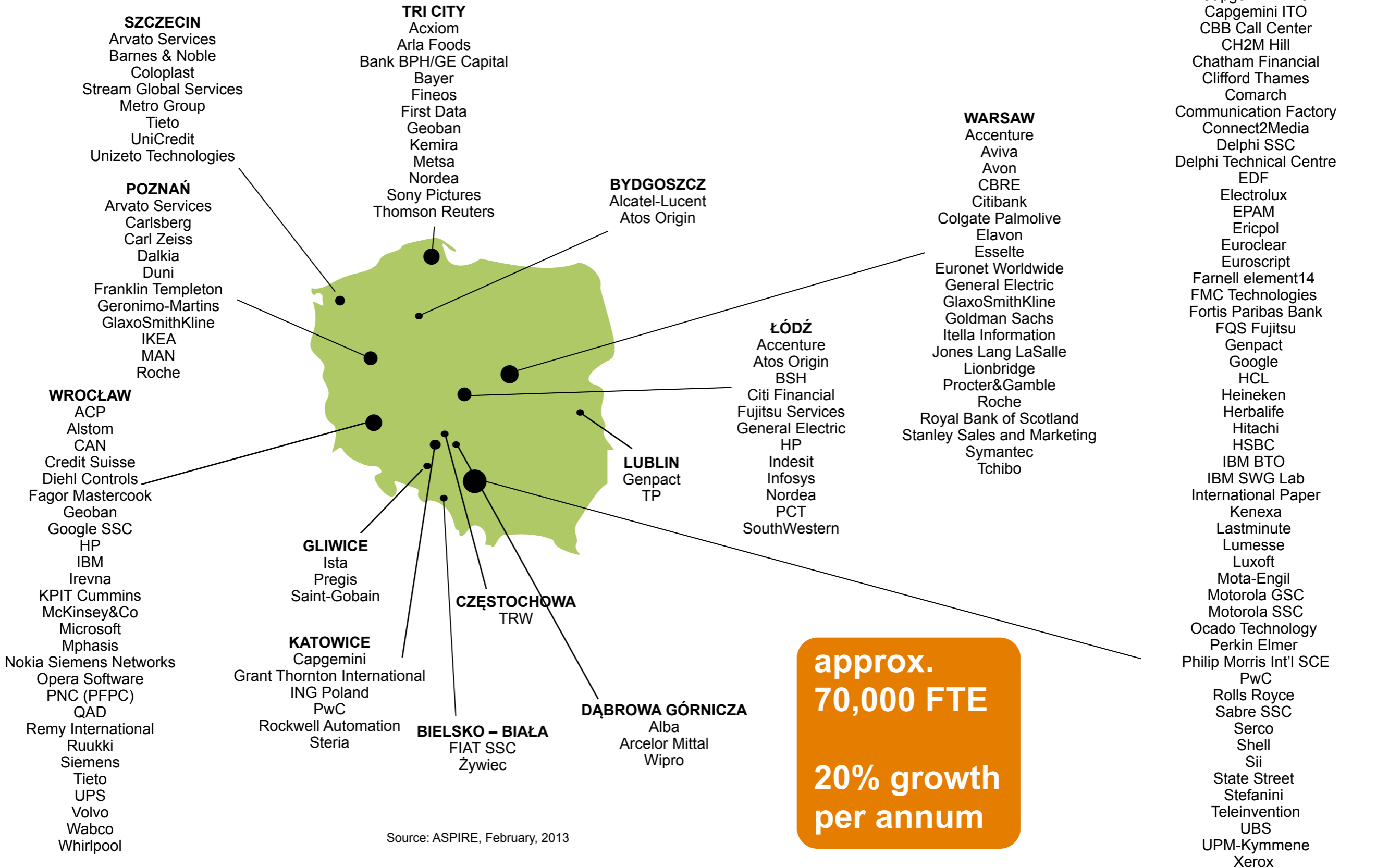
United Kingdom	491 pts
Germany	434 pts
EU (15 countries)	399 pts
France	346 pts
Czech Republic	137 pts
Hungary	130 pts
Poland	100 pts
Slovak Republic	99 pts
Romania	89 pts



Cities in
CEE with
over 10,000
FTE

Cities in
CEE with
10 or more
centres

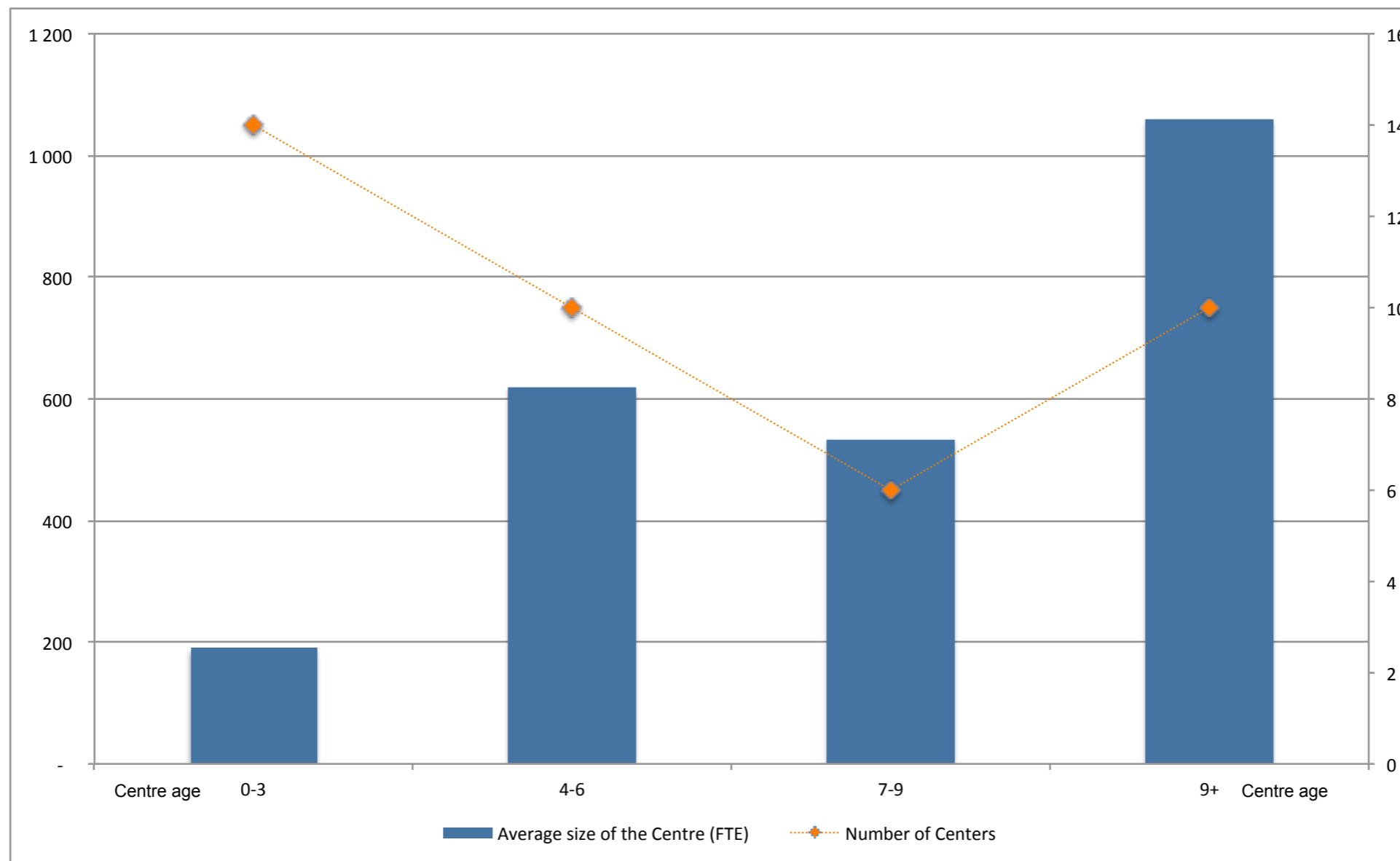
Poland: largest global business services market in Europe



Locating Centre in Krakow allows sourcing from larger CEE (and even European) talent pool

	2008	2013
% of foreign nationals in Centres	6%	11%
% of graduates from local Universities (Krakow)	72%	64%

Centres keep growing as more types of services and geographies are being added to the scope





Thank you

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