



“Next-wave” Location Profile – Krakow

Locations Insider™ (LI)

Market Report: October 2017 – Complimentary Abstract / Table of Contents

Our research offerings for global services

▶ Market Vista™

Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

▶ Application Services

▶ BPS | Banking Financial Services

▶ BPS | Healthcare & Life Sciences

▶ BPS | Insurance

▶ Catalyst™

▶ Cloud & Infrastructure

▶ Contact Center

▶ Digital Services

▶ Engineering Services

▶ Finance & Accounting

▶ Human Resources

▶ ITS | BFSI*

▶ ITS | Healthcare & Life Sciences

▶ IT Services Forecaster™

▶ Locations Insider™

▶ PricePoint™

▶ Procurement

▶ Recruitment & Talent Acquisition

▶ Service Optimization Technologies

▶ Transaction Intelligence

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Subscription information

- The full report is included in the following subscription(s)
 - **Locations Insider™ (LI)**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**

* Banking, financial services, and insurance



Corporate Headquarters

Office: +1-214-451-3000

info@everestgrp.com



European Headquarters

Office: +44-207-129-1318

unitedkingdom@everestgrp.com



Delhi Office

Office: +91-124-284-1000

india@everestgrp.com

Overview and methodology of the research

Overview of the research

Everest Group's Next wave location profiles provide crisp, yet insightful assessment of emerging / "Next-wave" countries or cities for services delivery. These reports help global sourcing practitioners or location strategy professionals stay ahead of competition in understanding global sourcing opportunities in "Next-wave" locations.

These reports offer perspectives on key dimensions that impact a location's relative attractiveness, including:

- Key drivers, challenges and untapped opportunities for global sourcing industry
- Talent and skills availability (at both entry and experienced levels)
- Depth and maturity across functions
- Financial attractiveness (including wage inflation and attrition)
- Delivery presence of enterprises and service providers
- Key languages supported
- Key environment risks (e.g., macroeconomic, geopolitical, infrastructure, safety and security, legal and regulatory)

The methodology of these reports includes:

- Proprietary tracking and databases on operating costs, labor pool, market activity, and risks
- Year-round tracking of 200+ locations around the world
- Coverage across all offshore, nearshore, and onshore locations across regions (APAC, Europe, North America, Latin America, Africa)
- Over 120 global projects on supporting clients on location decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

This study provides perspectives on key aspects of the global sourcing market in the location; below are four charts to illustrate the coverage of the report

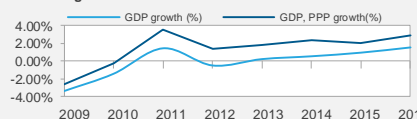
Country/City | Overview

Geographic and socio-economic indicators

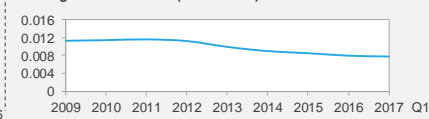
| | |
|-----------------------------|----|
| Region | XX |
| Time zone | XX |
| Government type | XX |
| Population | XX |
| GDP | XX |
| GDP per capita | XX |
| Currency | XX |
| Corporate tax rate | XX |
| CPI inflation | XX |
| Major languages spoken | XX |
| Economic development agency | XX |

Economic Indicators

Annual GDP growth rate



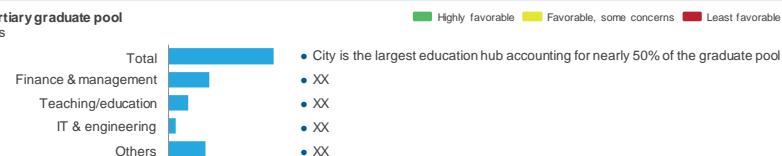
Exchange rate movement (LCU to USD)



Country/City | Talent and cost overview (page 1 of 2)

Entry-level talent pool

Annual tertiary graduate pool 2017; '000s



Functions supported

Functions

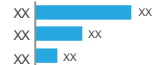
| Functions | Maturity |
|-------------------|----------|
| Contact center | XX |
| Non-voice BP | XX |
| IT-ADM | XX |
| IT Infrastructure | XX |
| Digital | XX |

- Contact center services such as customer care, receivables management, technical helpdesk, and outbound sales dominate the city offshore delivery landscape

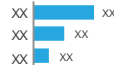
Country/City | Talent and cost overview (page 2 of 2)

Operating cost

Annual operating cost per FTE-BP (F&A)^{1,2} 2017; USD '000s



Annual operating cost per FTE-CC^{1,2} 2017; USD '000s



- City offers significant cost arbitrage over U.S. locations, and is amongst the most attractive nearshore locations from a cost perspective
- XX

Wage inflation and attrition

Wage inflation and attrition (CC) 2017; Percentage per annum



- Moderate wage inflation and attrition
- XX

Language skills

- XX
- XX

Country/City | Risk profile

Parameter

Everest Group rating

Comments

Geopolitical



- City has witnessed a stable political climate over the past few years, with both major political parties exhibiting a positive stance towards the industry
- XX
- XX
- XX
- XX

Macroeconomic



- City administration continues to meet its fiscal targets under the IMF loan accord, thus enabling further credit from the IMF and other multilateral lenders
- XX
- XX
- XX
- XX
- XX
- XX
- XX
- XX

Infrastructure



- City has built a strong optical fiber communication network around the country
- XX
- XX
- XX

Research calendar – Locations Insider

■ Published ■ Planned ▨ Current release

Flagship Locations Insider reports

Release date

| | |
|---|---------------------|
| Global Locations Annual Report 2017: Signs of Structure in a Disordered World | June 2017 |
| "Next-wave" Location Profiles: Delhi, India | August 2017 |
| "Next-wave" Location Profiles: Kuala Lumpur, Malaysia | August 2017 |
| "Next-wave" Location Profiles: Cork, Ireland | August 2017 |
| "Next-wave" Location Profiles: Penang, Malaysia | September 2017 |
| "Next-wave" Location Profiles: Iloilo, Philippines | September 2017 |
| "Next-wave" Location Profiles: Krakow, Poland | October 2017 |
| "Next-wave" Location Profiles: Belfast, Northern Ireland | Q4 2017 |
| "Next-wave" Location Profiles: Monterrey, Mexico | Q4 2017 |

Thematic Locations Insider reports

| | |
|---|----------------|
| Emergence of Western Europe for Centralized Service Delivery to Europe | July 2017 |
| Reimagining Location Strategy Due to Increasing Agile/DevOps Adoption | July 2017 |
| Impact of Brexit on Contact Center Landscape in UK & Ireland | July 2017 |
| Talent Model and Location Hotspots for Service Delivery Automation (SDA) Center of Excellence (CoE) | July 2017 |
| EU GDPR: Is There a Silver Lining to the Disruption? | September 2017 |
| Landscape of Locations Delivering Business Process Services To the UK & Ireland | Q4 2017 |
| Poland Tier-2 Cities: Diverse Value Propositions For Service Delivery | Q4 2017 |

Note: For a list of all Locations Insider™ reports published by us, please refer to our [website page](#)

Additional research references

The following documents are recommended for additional insight into the topic covered in this report. The recommended documents either provide additional details or complementary content that may be of interest:

1. **Global Locations Annual Report 2017: Signs of Structure in a Disordered World** ([EGR-2017-2-R-2234](#)); 2017. The global services locations landscape continued to witness stable growth in 2016 in terms of revenue; however, the growth rate was slower than the previous year owing to macroeconomic slowdown, political instability, and volatility in equity and investment markets. Similarly, the growth rate of center setups also dropped in 2016, in comparison to 2015. The period also continued to witness a shift from traditional locations (such as India) to leverage of other locations in Asia and Nearshore Europe. Additionally, there has been significant growth in delivery of disruptive technologies such as digital. The Global Locations Annual Report 2017 is a unique and comprehensive guide to understanding the nuances of the global services locations landscape and interpreting locations-related developments and trends to frame locations strategy. It presents insights into the size and growth of the global services market, update of locations activity, changes in risk profiles of locations, and an analysis of the maturity, arbitrage, and potential of locations (MAP Matrix™)
2. **Emergence of Western Europe for Centralized Global Service Delivery to Europe** ([EGR-2017-2-R-2266](#)); 2017. Over the last few years, Western Europe has gained significant importance as a global/regional delivery geography. GIC growth is largely fuelled by increasing number of GIC setups by Europe- / U.S.-based firms. Western European locations offer a unique value proposition with availability of skilled-talent, stable business/operating environment, multilingual capabilities, and high maturity for certain services. This report provides a detailed assessment of location options within Western Europe for global service delivery. This report assesses the key drivers for enterprises/service providers to move to Western Europe and key trends affecting the operationalizing of a delivery center in the geography. It also aims to assist companies in location selection within Western Europe by highlighting the key factors to be considered while selecting locations for service delivery.
3. **“Next-wave” Location Profile – Cork, Ireland** ([EGR-2017-2-LP-2313](#)); 2017. Everest Group’s Next Wave Location Profiles provide crisp, yet insightful assessment of emerging / “Next-wave” countries or cities for services delivery. This report on Cork offers perspectives on global sourcing profile of Cork, key opportunities, drivers, and challenges, along with an overview of talent and skills availability, financial attractiveness, and environment risks.

For more information on this and other researches published by Everest Group, please contact us:

Ankit Pandey, Analyst – Global Sourcing:
Namita Dahiya, Senior Analyst – Global Sourcing:
Parul Jain, Senior Analyst – Global Sourcing:

ankit.pandey@everestgrp.com
namita.dahiya@everestgrp.com
parul.jain@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com



About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

Dallas (Headquarters)

info@everestgrp.com

+1-214-451-3000

Bangalore

india@everestgrp.com

+91-804-276-4533

Delhi

india@everestgrp.com

+91-124-496-1000

London

unitedkingdom@everestgrp.com

+44-207-129-1318

New York

info@everestgrp.com

+1-646-805-4000

Toronto

canada@everestgrp.com

+1-416-388-6765

Stay connected

Website



www.everestgrp.com

Social Media



@EverestGroup



@Everest Group

Blog

[Sherpas In Blue Shirts](http://www.sherpasinblueshirts.com)

www.sherpasinblueshirts.com