

ASPIRE LANGUAGES SURVEY 2010

Summary Report



Key Industry Data	ASPIRE	Languages
<ul style="list-style-type: none"> > 16,000 people employed in 51 BPO and Shared Service Centres in Kraków > 30% of Polish BPO/SSC industry located in Kraków > Kraków ranked first in Europe and 4th globally as emerging location for global services outsourcing * > Ranked amongst top 5 established locations for multi-lingual centres * > Industry growing at 25-30% per annum in Kraków. > 100% of those employed are graduates (87%) or students (13%) 	<ul style="list-style-type: none"> > Association of BPO/SSC/R&D companies > Members represent 70% of the industry in Kraków > Objective to promote information-sharing and collaboration between BPO/SSC companies and local stakeholders to grow the industry. > 6 Task Forces on priority areas, including promotion of languages learning and soft skills learning 	<ul style="list-style-type: none"> > 30 languages served in Kraków centres > 98% of employees speak English > Growth of the sector in Kraków requires capability to serve wide range of languages, especially European languages > Demand for increased quantity of foreign language speakers and improved levels of proficiency
Objectives	Benefits	Actions
<ul style="list-style-type: none"> > Putting a framework in place in order to long-term: <ul style="list-style-type: none"> – Increase quality level and availability of standard languages (English, German, French, Spanish, Italian, Dutch, Russian - voice and non-voice – Better access to non-standard languages – voice and non-voice > Share language needs in the short-, medium, and long-term perspective for both quantity and quality 	<ul style="list-style-type: none"> > Co-operation between stakeholders in promotion and provision of language learning > Increased demand for languages learning among students and other groups > Better match of supply and demand 	<ul style="list-style-type: none"> > ASPIRE Survey of Languages Needs - current status and 12 and 24 month forecasts > Languages Forum - bringing together key stakeholders in languages learning provision. Leadership of Voivode and Rector of UJ > Languages Promotional event - large scale event bringing together all stakeholders, including media and private providers

* Source: Global Services-Tholons: Top 50 Emerging Cities for Global Outsourcing 2009

The survey analyses the languages needs of BPO/SSC in the Kraków market

Metrics covered include:

Current status of languages served

12-month forecast

24-month forecast

(broken down by voice and non voice)

Foreign nationals per language

Training hours for languages 2009

23 BPO SSC companies participated in the survey, employing approx. 11,000 people

Research was carried out in May/June 2010

Ranking	Company	Headcount	Languages served in Centre
1	Capgemini BPO	2,121	28
2	Capgemini ITO	1,471	15
3	Shell	1,392	17
4	IBM BTO	1,150	24
5	PMI SCE	829	17
6	State Street Services	584	2
7	Electrolux	457	16
8	Hewitt Associates	416	4
9	International Paper	366	9
10	HSBC	334	6
11	Airline Accounting Center	316	6
12	Accounting Plaza	266	4
13	Alexander Mann Solutions	229	8
14	UBS	196	4
15	HCL	147	16
16	Evolving Group	134	3
17	UPM-Kymenne	102	4
18	Motorola FSSC	85	11
19	Hitachi Data Systems	80	14
20	Intelenet	72	2
21	Euroscript	52	20
22	PricewaterhouseCoopers	49	3
	Amway	Start-up - July 2010	
	Totals	10,848	

Respondents: N = 23

Ranking	Language	Total Voice	Total Non-voice	Total (Voice + Non-voice)	Highest score (Voice)	Highest score (Non Voice)	Highest score (Total)	Number of centres offering language
1	English	4,628	-	4,628	1,044	-	1,044	18
2	German	696	513	1,209	172	168	322	18
3	French	689	253	942	196	130	220	19
4	Polish	463	173	636	98	80	98	15
5	Italian	297	126	423	107	50	157	15
6	Spanish	248	129	377	80	66	146	16
7	Dutch	146	53	199	50	25	75	11
8	Russian	71	84	155	20	61	61	14
9	Portuguese	90	17	107	33	6	33	9
10	Swedish	68	19	87	12	40	55	9
11	Hungarian	63	14	77	16	6	22	11
12	Czech	44	15	59	13	6	17	10
13	Slovak	36	11	47	13	3	14	9
14	Danish	21	6	27	10	5	15	5
15	Romanian	18	4	22	6	3	9	7
16	Croatian	11	8	19	8	5	10	5
17	Greek	14	4	18	9	2	11	4
18	Finnish	13	4	17	7	3	10	5
18	Turkish	16	1	17	13	1	13	4
20	Lithuanian	11	5	16	7	5	7	4
21	Bulgarian	10	4	14	7	2	9	3
22	Norwegian	10	3	13	5	2	7	3
23	Slovenian	4	8	12	2	6	7	3
24	Ukrainian	9	3	12	6	2	6	6
25	Latvian	3	5	8	1	5	5	4
26	Serbian	6	0	6	4	0	4	2
27	Estonian	1	3	4	1	1	2	3
27	Hebrew	4	0	4	3	0	3	2
29	Arabic	1	0	1	1	0	1	1
29	Japanese	1	0	1	1	0	1	1
Totals		7,692	1,465	9,157				

Respondents: N = 23

-  Western European
-  Nordic
-  East European
-  Turkish / Greek
-  Exotic

Ranking by ratio of expats	Ranking by language	Language	Total heads serving language	Total Foreign nationals	Ratio (%)
1	24	Ukrainian	10	8	80.0
2	18	Finnish	15	11	73.3
3	21	Bulgarian	5	3	60.0
4	15	Romanian	21	11	52.4
5	27	Estonian	4	2	50.0
6	26	Serbian	6	3	50.0
7	8	Russian	62	22	35.5
8	13	Slovak	34	12	35.3
9	11	Hungarian	59	18	30.5
10	17	Greek	18	5	27.8
11	27	Hebrew	4	1	25.0
12	20	Lithuanian	16	4	25.0
13	7	Dutch	146	34	23.3
14	9	Portuguese	72	15	20.8
15	14	Danish	25	5	20.0
16	23	Slovenian	10	2	20.0
17	12	Czech	51	9	17.6
18	18	Turkish	17	3	17.6
19	22	Norwegian	12	2	16.7
20	25	Latvian	8	1	12.5
21	5	Italian	337	38	11.3
22	16	Croatian	9	1	11.1
23	6	Spanish	296	24	8.1
24	10	Swedish	80	6	7.5
25	1	English	1,457	108	7.4
26	3	French	567	30	5.3
27	2	German	763	23	3.0
28	29	Arabic	0	0	0
28	29	Japanese	0	0	0
	4	Polish	361		
Totals			4,465	401	

Respondents: N = 13

-  Western European
-  Nordic
-  East European
-  Turkish / Greek
-  Exotic

Ranking	Service Line	Total (Voice)	Total (Non Voice)	Total	Highest score (Voice)	Highest score (Non Voice)	Highest score (Total)	Number of centres offering service line
1	F&A	3,076	877	3,953	631	519	1,140	13
2	IT	2,142	1	2,143	1,471	1	1,471	10
3	Customer Service	730	78	808	222	56	222	8
4	HR	689	8	797	229	8	229	8
5	Other	406	291	697	122	104	203	12
6	Cash Collection	369	1	370	197	1	197	5
	Totals	7,692	1,465	9,157				

Respondents: N = 21

Language training by language 2009

Languages Survey

Training Ranking	Language Ranking	Training ranking v Language ranking	Language	Total heads	Total hours per annum	Hours per head per annum	Highest score	Number of centres offering training
1	1		English	3,908	29,379	7.5	9,530	11
2	2		German	877	14,042	16.0	5,210	9
3	6	▲	Spanish	226	8,748	38.7	4,328	4
4	4		Polish	679	8,519	12.5	4,675	4
5	3	▼	French	679	7,037	10.4	4,300	5
6	5	▼	Italian	261	3,585	13.7	1,870	7
7	8	▲	Dutch	124	2,185	17.6	967	4
8	7	▼	Russian	143	2,005	14.0	905	4
9	10	▼	Hungarian	54	1,240	23.0	1,200	2
10	11	▼	Czech	48	520	10.8	520	1
11	9	▼	Portuguese	83	435	5.2	435	1
12	14	▲	Croatian	18	286	15.9	286	1
13	13		Swedish	31	276	8.9	270	2
14	15	▲	Greek	16	270	16.9	270	1
15	20	▲	Slovenian	12	246	20.5	246	1
16	12	▼	Slovak	38	160	4.2	160	1
17	17		Turkish	14	135	9.6	135	1
18	18		Romanian	13	90	6.9	90	1
19	19		Danish	12	6	0.5	6	1
20	24	▲	Finnish	7	6	0.9	6	1
21	25	▲	Norwegian	6	6	1.0	6	1
unranked	29		Arabic	1	0	0.0	0	0
unranked	22		Bulgarian	10	0	0.0	0	0
unranked	28		Estonian	2	0	0.0	0	0
unranked	27		Hebrew	3	0	0.0	0	0
unranked	30		Japanese	1	0	0.0	0	0
unranked	23		Latvian	8	0	0.0	0	0
unranked	16		Lithuanian	14	0	0.0	0	0
unranked	26		Serbian	6	0	0.0	0	0
unranked	21		Ukrainian	11	0	0.0	0	0
			Not specified	1,206	9,230	7.7	9,230	-
			Totals	8,511	88,406	10.4		

-  Western European
-  Nordic
-  East European
-  Turkish / Greek
-  Exotic

Respondents: N = 11 Key: ▲ indicates ranking is higher than comparative ranking ▼ indicates that ranking is lower

12 month forecast - additions

Languages Survey

Ranking	Ranking 2010 totals	2011 ranking v 2010 ranking	Language	Total Voice	Total Non-voice	Total (Voice + Non-voice)	Highest score (Voice)	Highest score (Non Voice)	Highest score (Total)	Number of centres offering language
1	1		English	623	54	677	120		120	13
2	2		German	237	36	273	75	13	75	13
2	4	▲	Polish	156	117	273	120	60	120	8
4	3	▼	French	209	23	232	75	15	75	11
5	5		Italian	127	24	151	43	9	49	10
6	8	▲	Russian	74	26	100	33	16	49	10
7	6	▼	Spanish	75	17	92	20	12	25	9
8	10	▲	Swedish	66	16	82	19	5	19	9
9	7	▼	Dutch	69	10	79	20	7	20	11
10	12	▲	Czech	54	10	64	21	5	26	10
11	11		Hungarian	26	27	53	6	16	16	10
12	15	▲	Romanian	26	16	42	12	11	12	8
13	9	▼	Portuguese	26	12	38	6	5	10	9
14	13	▼	Slovak	22	11	33	7	5	8	9
15	14	▼	Danish	20	3	23	5	3	5	7
16	22	▲	Norwegian	15	7	22	10	5	15	4
17	18	▼	Finnish	17	2	19	5	10	5	11
18	21	▼	Bulgarian	15	2	17	11	2	13	3
19	16	▼	Croatian	2	10	12	2	5	5	3
20	23	▲	Slovenian	2	9	11	2	6	6	3
21	17	▼	Greek	2	7	9	2	5	5	3
21	20	▼	Lithuanian	4	5	9	2	5	5	3
23	25	▲	Latvian	4	3	7	2	3	3	3
23	unranked	▲	Flemish	7	0	7	7	0	7	1
25	27	▲	Estonian	3	3	6	2	3	3	3
26	18	▼	Turkish	3	0	3	3	0	3	1
27	26	▼	Serbian	2	0	2	2	0	2	1
28	24	▼	Ukrainian	1	0	1	1	0	1	1
Totals				1,887	450	2,337				
Respondents: N = 20			Key: ▲ indicates ranking is higher than comparative ranking ▼ indicates that ranking is lower							

-  Western European
-  Nordic
-  East European
-  Turkish / Greek
-  Exotic

24 month forecast - additions

Languages Survey

Ranking	Ranking 2010 totals	2012 ranking v 2010 ranking	Language	Total Voice	Total Non-voice	Total (Voice + Non-voice)	Highest score (Voice)	Highest score (Non Voice)	Highest score (Total)	Number of centres hiring in language
1	1		English	431	86	517	115		150	10
2	2		German	250	42	292	100	30	100	10
3	4	▲	Polish	140	70	210	130	60	190	6
4	3	▼	French	191	10	201	100	5	100	8
5	5		Italian	78	6	84	20	5	20	8
6	6		Spanish	63	9	72	20	5	25	9
7	7		Dutch	61	6	67	20	3	20	10
8	11	▲	Hungarian	51	12	63	25	5	26	10
9	10	▲	Swedish	33	11	44	15	5	20	8
10	9	▼	Portuguese	29	11	40	10	3	10	9
11	12	▲	Czech	22	8	30	5	5	6	9
12	22	▲	Norwegian	16	7	23	3	2	3	5
13	8	▼	Russian	8	13	21	30	5	30	8
13	15	▲	Romanian	13	8	21	4	3	6	8
15	18	▲	Turkish	17	3	20	15	3	15	4
16	14	▼	Danish	16	3	19	5	3	5	6
17	unranked	▲	Flemish	15	0	15	15	0	15	1
17	18	▲	Finnish	13	2	15	10	2	10	4
19	20	▲	Lithuanian	2	6	8	2	5	5	3
20	13	▼	Slovak	13	8	7	3	5	5	7
20	21	▼	Bulgarian	6	1	7	2	1	3	3
20	26	▼	Serbian	2	5	7	2	5	5	2
20	16	▼	Croatian	0	7	7	0	5	5	2
24	25	▲	Latvian	2	4	6	2	3	3	3
25	23	▼	Slovenian	2	3	5	2	3	3	2
25	27	▲	Estonian	1	4	5	1	3	3	3
25	17	▼	Greek	1	4	5	1	2	2	3
28	24	▼	Ukrainian	1	3	4	1	3	3	2
Totals				1,477	352	1,815				
Respondents: N = 17			Key: ▲ indicates ranking is higher than comparative ranking ▼ indicates that ranking is lower							

-  Western European
-  Nordic
-  East European
-  Turkish / Greek
-  Exotic

Totals: current status, 12- & 24- month forecasts

Languages Survey

Ranking	Ranking 2010 totals	Ranking 2012 v 2010	Language	Current Voice	Current Non-voice	Current Total	12 month forecast voice	12 month forecast non - voice	12 month forecast total	24 month forecast voice	24 month forecast non - voice	24 month forecast total
1	1		English	4,628	0	4,628	5,251	54	5,305	5,682	140	5,822
2	2		German	696	513	1,209	933	549	1,482	1,183	591	1,774
3	3		French	689	253	942	898	276	1,174	1,089	286	1,375
4	4		Polish	463	173	636	619	290	909	759	360	1,119
5	5		Italian	297	126	423	424	150	574	502	156	658
6	6		Spanish	248	129	377	323	146	469	386	155	541
7	7		Dutch	146	53	199	215	63	278	276	69	345
8	8		Russian	71	84	155	145	110	255	206	123	276
9	10	▲	Swedish	68	19	87	134	35	169	167	46	213
10	11	▲	Hungarian	63	14	77	89	41	130	140	53	193
11	9	▼	Portuguese	90	17	107	116	29	145	145	40	185
12	12		Czech	44	15	59	98	25	123	120	33	153
13	13		Slovak	36	11	47	58	22	80	71	30	87
14	15	▲	Romanian	18	4	22	44	20	64	57	28	85
15	14	▼	Danish	21	6	27	41	9	50	57	12	69
16	22	▲	Norwegian	10	3	13	25	10	35	41	17	58
17	18	▲	Finnish	13	4	17	30	6	36	43	8	51
18	18		Turkish	16	1	17	19	1	20	36	4	40
19	21	▲	Bulgarian	10	4	14	25	6	31	31	7	38
19	16	▼	Croatian	11	8	19	13	18	31	13	25	38
21	20	▼	Lithuanian	11	5	16	15	10	25	17	16	33
22	17	▼	Greek	14	4	18	16	11	27	17	15	32
23	23		Slovenian	4	8	12	6	17	23	8	20	28
24	unranked	▲	Flemish	0	0	0	7	0	7	22	0	22
25	25		Latvian	3	5	8	7	8	15	9	12	21
26	24	▼	Ukrainian	9	3	12	10	3	13	11	6	17
27	27		Estonian	1	3	4	4	6	10	5	10	15
27	26	▼	Serbian	6	0	6	8	0	8	10	5	15
29	27	▼	Hebrew	4	0	4	4	0	4	4	0	4
30	29	▼	Arabic	1	0	1	1	0	1	1	0	1
30	29	▼	Japanese	1	0	1	1	0	1	1	0	1
			Totals	7,692	1,465	9,157	9,579	1,915	11,494	11,109	2,267	13,309
			Respondents: Current: N = 23				12 month additions: N = 20			24 month additions: N = 17		
			Key:	▲ indicates ranking is higher than comparative ranking				▼ indicates that ranking is lower				

-  Western European
-  Nordic
-  East European
-  Turkish / Greek
-  Exotic

Ranking 2012	Ranking 2010	Ranking 2012 v 2010	Language	Current Voice	12 month totals voice	12 month % growth	24 month totals voice	24 month % growth
1	1		English	3,763	4,366	16%	4,797	27%
2	2		German	645	882	37%	1,132	76%
3	3		French	631	835	32%	1,026	63%
4	4		Polish	431	587	36%	727	69%
5	5		Italian	281	408	45%	486	73%
6	6		Spanish	220	295	34%	358	63%
7	7		Dutch	138	207	50%	268	94%
8	11	▲	Russian	58	122	110%	183	216%
9	9		Swedish	67	133	99%	166	148%
10	8	▼	Portuguese	88	114	30%	143	63%
11	10	▼	Hungarian	62	88	42%	139	124%
12	12		Czech	37	91	247%	113	305%
13	13		Slovak	32	54	69%	67	109%
14	14		Danish	21	41	95%	57	171%
15	15		Romanian	17	43	153%	56	229%
16	18	▲	Finnish	13	30	131%	43	231%
17	21	▲	Norwegian	10	25	150%	41	310%
18	16	▼	Turkish	15	18	20%	35	133%
19	21	▲	Bulgarian	10	25	150%	31	210%
20	unranked	▲	Flemish	0	7	∞	22	∞
21	19	▼	Lithuanian	11	15	36%	17	227%
22	17	▼	Greek	14	16	14%	17	21%
23	19	▼	Croatian	11	13	18%	13	18%
24	23	▼	Ukrainian	8	9	13%	10	25%
24	24		Serbian	6	8	33%	10	67%
26	27	▲	Latvian	3	7	133%	9	200%
27	25	▼	Slovenian	4	6	50%	8	100%
28	28		Estonian	1	4	300%	5	400%
29	25	▼	Hebrew	4	4	0%	4	0%
Totals				6,601	8,453	28%	9,983	51%

Data of respondents providing answers to current status, 12 month & 24 month forecasts: N = 17

-  Western European
-  Nordic
-  East European
-  Turkish / Greek
-  Exotic

Non-voice: current status, 12- & 24- month forecasts

Languages Survey

Ranking 2012	Ranking 2010	Ranking 2012 totals v 2010 totals	Language	Current Non-voice	12 month totals non -voice	12 month % growth	24 month totals non-voice	24 month % growth
1	1		German	513	549	7%	591	15%
2	2		French	253	276	9%	286	13%
3	5	▲	Polish	93	190	104%	260	180%
4	3	▼	Italian	126	150	19%	156	24%
5	4	▼	Spanish	129	146	13%	155	20%
6	-		English	-	54	-	140	-
7	6	▼	Russian	84	110	31%	123	46%
8	7	▼	Dutch	48	58	21%	64	33%
9	8	▼	Hungarian	14	41	193%	53	279%
10	9	▼	Swedish	18	34	89%	45	150%
11	10	▼	Portuguese	17	29	71%	40	135%
12	11	▼	Czech	13	23	77%	31	138%
13	12	▼	Romanian	4	20	400%	28	600%
14	13	▼	Slovak	8	19	122%	27	238%
15	14	▼	Croatian	8	18	125%	25	213%
16	15	▼	Slovenian	8	17	113%	20	150%
17	17		Norwegian	3	10	233%	17	467%
18	17	▼	Lithuanian	5	10	100%	16	220%
19	16	▼	Greek	4	11	175%	15	275%
20	19	▼	Danish	6	9	50%	12	100%
20	20		Latvian	5	8	60%	12	140%
22	21	▼	Estonian	3	6	100%	10	233%
23	21	▼	Finnish	4	6	50%	8	100%
24	21	▼	Bulgarian	4	6	50%	7	75%
25	24	▼	Ukrainian	3	3	0%	6	100%
26	26		Serbian	0	0	0%	5	∞
27	25	▼	Turkish	1	1	0%	4	300%
Totals				1,374	1,804	31%	2,156	57%

Data of respondents providing answers to current status, 12 month & 24 month forecasts: N = 17

-  Western European
-  Nordic
-  East European
-  Turkish / Greek
-  Exotic

Totals: current status, 12- & 24- month forecasts

Languages Survey

Ranking 2012	Ranking 2010	Ranking 2012 v 2010	Language	Current Total	12 month total	12 month % growth	24 month total	24 month % growth
1	1		English	3,763	4,420	17%	4,937	31%
2	2		German	1,158	1,431	24%	1,723	49%
3	3		French	884	1,111	26%	1,312	48%
4	4		Polish	524	777	48%	987	88%
5	5		Italian	407	558	37%	642	58%
6	6		Spanish	349	441	26%	513	47%
7	7		Dutch	186	265	42%	332	78%
8	8		Russian	142	232	63%	253	78%
9	10	▲	Swedish	85	167	96%	211	148%
10	11	▲	Hungarian	76	129	70%	192	153%
11	9	▼	Portuguese	105	143	36%	183	74%
12	12		Czech	50	114	128%	144	188%
13	15	▲	Romanian	21	63	200%	84	300%
14	13	▼	Slovak	40	73	83%	80	100%
15	14	▼	Danish	27	50	85%	69	156%
16	21	▲	Norwegian	13	35	169%	58	346%
17	18	▲	Finnish	17	36	118%	51	200%
18	19	▲	Turkish	16	19	19%	39	144%
19	20	▲	Bulgarian	14	31	121%	38	171%
19	16	▼	Croatian	19	31	63%	38	100%
21	19	▼	Lithuanian	16	25	56%	33	106%
22	17	▼	Greek	18	27	50%	32	78%
23	22	▼	Slovenian	12	23	92%	28	133%
24	unranked	▲	Flemish	0	7	∞	22	∞
25	24	▼	Latvian	8	15	88%	21	163%
26	23	▼	Ukrainian	11	12	9%	16	45%
27	26	▼	Estonian	4	10	150%	15	275%
27	25	▼	Serbian	6	8	33%	15	150%
29	26	▼	Hebrew	4	4	0%	4	0%
			Totals	7,975	10,257	29%	12,072	51%

Data of respondents providing answers to current status, 12 month & 24 month forecasts: N = 17



Western European



Nordic



East European



Turkish / Greek



Exotic

Languages Survey

Key points

51% growth over 24 months

Figures do not include companies committed to opening centres in Kraków

30 languages are currently served in Kraków. Highest volumes in terms of languages growth over the next 2 years will be seen in English, **French**, **German**, **Spanish** and **Italian**, with strong growth also in some **Nordic** languages.

Availability of language skills across the range of European languages

Specifically in terms of languages, domestic supply is able to meet the bulk of the demand, but Kraków is also able to attract foreign nationals in cases where supply doesn't meet demand. Together, this allows companies to be confident in their ability to migrate processes from across the continent, a key factor in the economies of scale which the industry demands.

The relative maturity of the Kraków market compared to other locations in Poland.

Krakow alone among Polish cities benefits from the clustering effects we see in places such as Silicon Valley and Bangalore - a growing pool of people experienced in BPO/SSC; graduates attuned to the needs of the market; conditions necessary to attract talent from outside Kraków.