Summary Report

SSC BPO Survey, Jan-Oct 2008

Advisory/Shared Services Team

PwC

Thursday, September 10, 2009

Content

Jan-Oct 2008

PricewaterhouseCoopers

Thursday, September 10, 2009

Research overview

The research programme has been initiated by South Poland Business Link and is being conducted within the ASPIRE programme. The survey analyses the SSC/BPO market in Krakow in terms of size, scope, staff, location and specific centre characteristics.

The questionnaire has been developed by PricewaterhouseCoopers Poland and distributed to 12 SSC/BPO centres in November 2008. The responses from all 12 centres (including top 4 largest employers) have been gathered and analysed by PwC team.

The data in the report is for the period between January and October 2008.

Each centre receives an individual report with cumulative data from the survey. The data gathered has been compared with group average and/or median. The report content may be limited due to lack of data provided by your Company for certain areas. Population is not uniform so it has been provided in each section.

The following SSC/BPO centres have participated in the survey:

- Accounting Plaza Central Europe
- Capgemini Polska
- HCL Poland
- Hewitt Associates
- Hitachi Data Systems (Polska)
- HSBC Bank Polska
- IBM BTO Business Consulting Services
- PMI Service Center Europe
- Shell Polska (Zabierzów Branch)
- State Street Services Poland
- UBS Fund Services (Luxembourg, Polish Branch)
- UPM-Kymmene

Thursday, September 10, 2009

SSC/BPO sector in Krakow economy

1 out of every 10 employed in the private sector in Krakow works in the SSC/BPO sector (total population estimate is 16 000 employees*).
The survey has covered around 56% of employees working in the SSC/BPO sector.

The average person working in the surveyed group earns almost 70% more than the average person employed in the private sector in Krakow.
65% of overall modern office space is in use by the BPO/SSC sector.

italic predicted by end of 2009
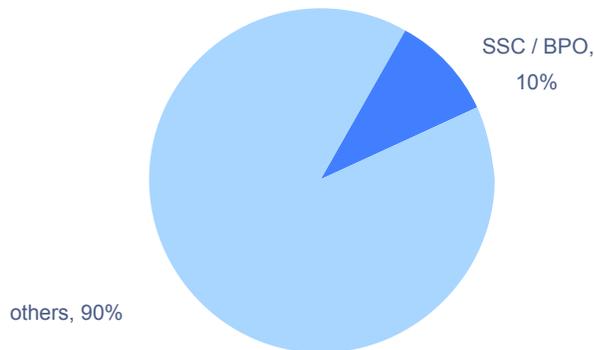*Source for data about Krakow: Statistical bulletin of the city of Krakow. 3rd quarter of 2008 edition*

Monthly gross salary (PLN)

private sector in Krakow (I - IX 2008): 3099
the survey group (I - X 2008): 5232
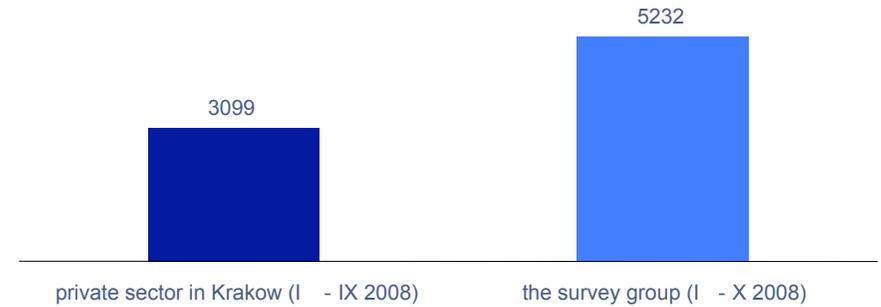
SSC / BPO employees as proportion of private sector in Krakow

SSC / BPO, 10%
others, 90%

Modern office space in Krakow

SSC / BPO sector, 65%

Thursday, September 10, 2009
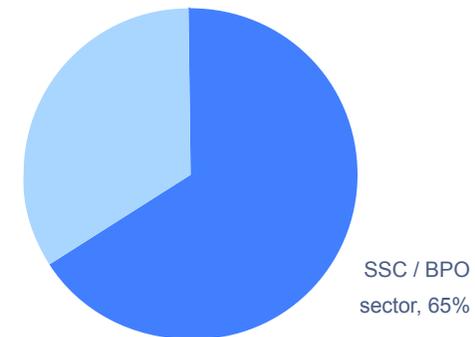
Section 1 - People

1.1 Headcount

1.2 Total FTE

1.3 Sickness leave

1.4 Average vacation days

1.5 Average training days

1.6 Total attrition rate

1.7 Management structure

1.8 Staff structure

1.9 Staff recruitment

1.10 Staff education

1.11 Staff living structure

Thursday, September 10, 2009

1.1 Headcount

The chart presents the average and the median within the total researched group in regards to the total headcount. In 2008 the average is 584, while in 2009 is expected to be 781 and in 2010 is expected to be 943.
Population: 11*
Population in 2008: 12

Headcount

| 943 |
| 781 |
| 584 |
| 584 |
| 500 |
| 261 |

Average   Median

■ 2008 ■ 2009 ■ 2010
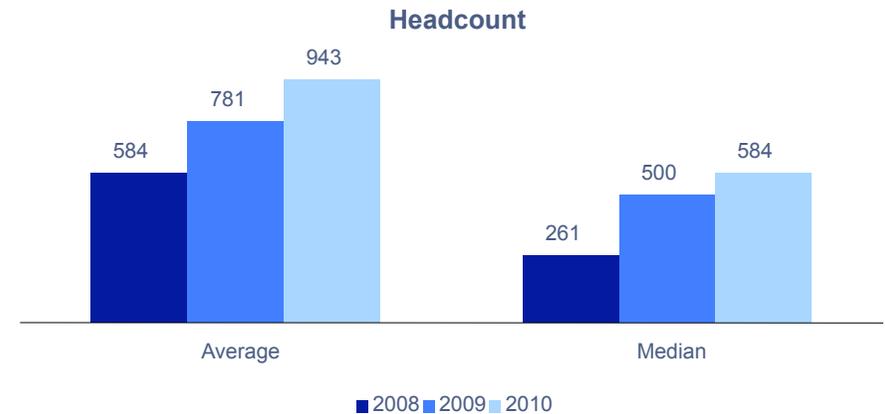
The average total headcount is going to increase within
2 years by 62% within the researched group, while median is going to increase by 124%.
Population: 11

Headcount Change (% of 2008)

124%

92%

62%

34%

0%

2008   2009   2010

◆ Average   ■ Median

* - Group of respondents

Thursday, September 10, 2009

Section 1 - People
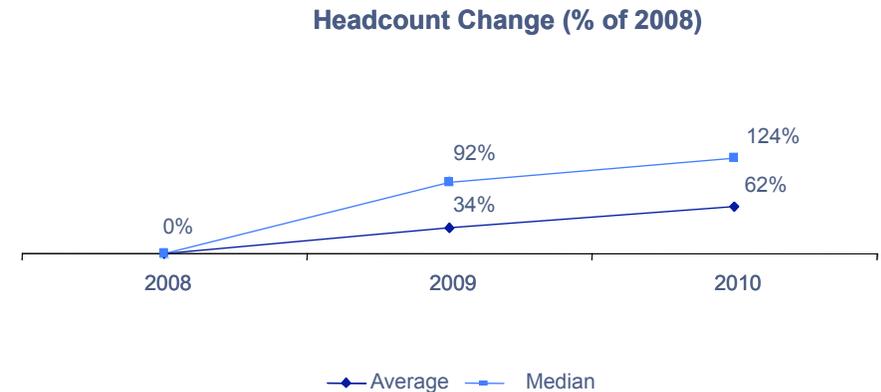
1.2 Total FTE

The chart presents the management percentage of total headcount within the researched group split by average, median, the lowest result and the highest result.
Population: 12

Management as % of total

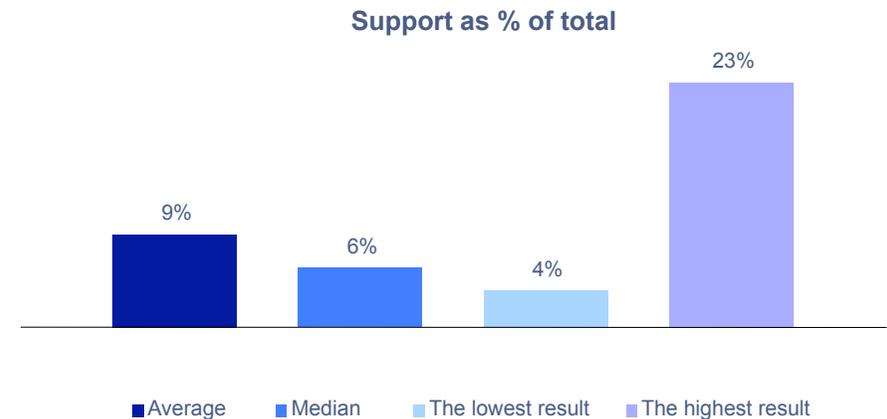| 12%	10%	2%	26%
■ Average	■ Median	■ The lowest result	■ The highest result
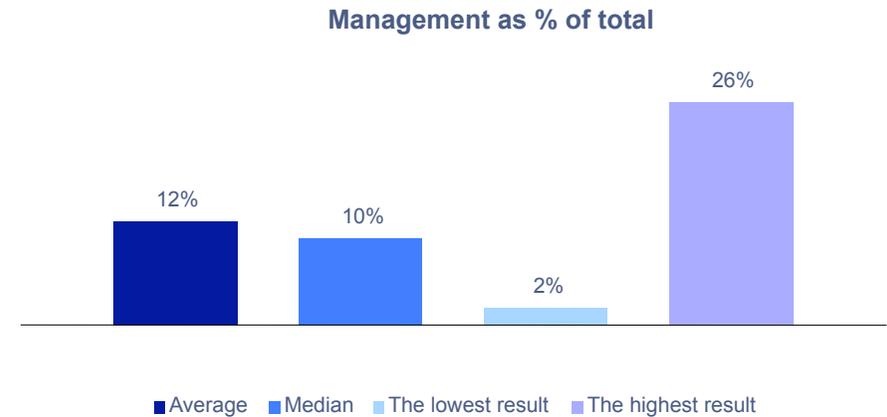
The chart presents the support percentage of total headcount within the researched group split by average, median, the lowest result and the highest result.
Population: 12

Support as % of total

9%	6%	4%	23%
■ Average	■ Median	■ The lowest result	■ The highest result

Thursday, September 10, 2009

1.3 a) Sickness leave

The chart presents the amount of days per person spent on sickness leave within the researched period split by operations and management. Both, operations and managements present average, median, the lowest result and the highest result.
Population: 12

Sickness leave (days)
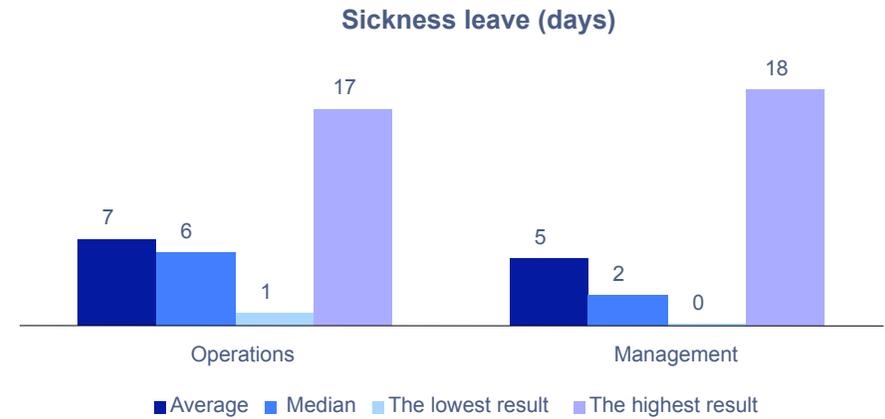
1.3 b) Maternity leave

The chart presents the amount of days per person spent on maternity leave within the researched period split by operations and management. Both, operations and managements present Average and median.
Population: 9

Maternity leave (days)

Thursday, September 10, 2009

Section 1 - People

1.4 Average vacation days taken

The chart presents the number of vacation days taken per person within the researched period split by operations and management. Both, operations and managements present average, median, the lowest result and the highest result.
Population: 11

Vacation (days)

1.5 Average days spent on training

The chart presents the number of days spent on training per person within the researched period split by operations and management. Both, operations and managements present average, median, the lowest result and the highest result.
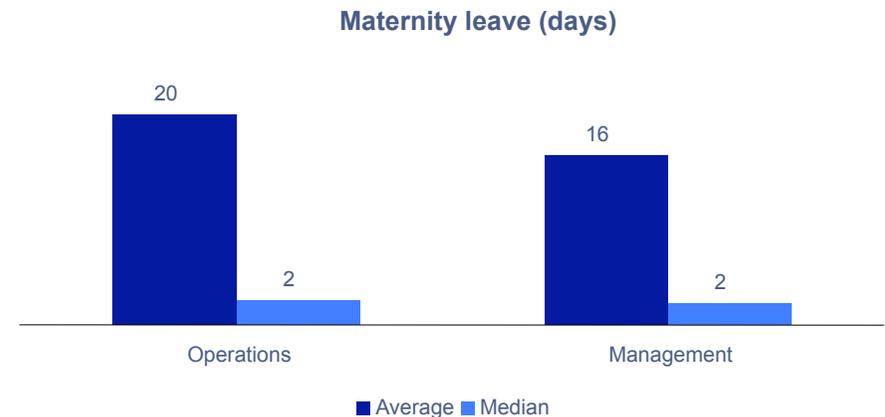*Population: 10*

Trainings (days)

Thursday, September 10, 2009

Section 1 - People

1.6 Total attrition rate

The chart presents percentage of attrition rate within the researched group split by operations and management.
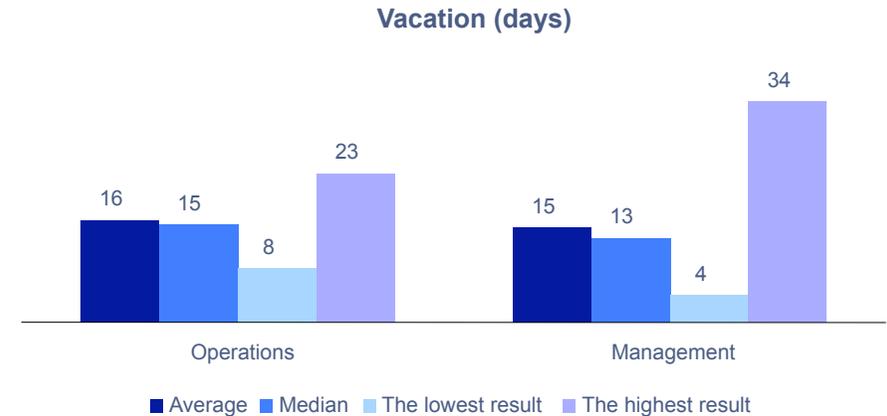Both operations and management present average, median the lowest result and the highest.
Population: 11

Attrition rate

- 12% (Operations Average)
- 8% (Operations Median)
- 0% (Operations The lowest result)
- 35% (Operations The highest result)
- 4% (Management Average)
- 1% (Management Median)
- 0% (Management The lowest result)
- 15% (Management The highest result)

■ Average ■ Median ■ The lowest result ■ The highest result
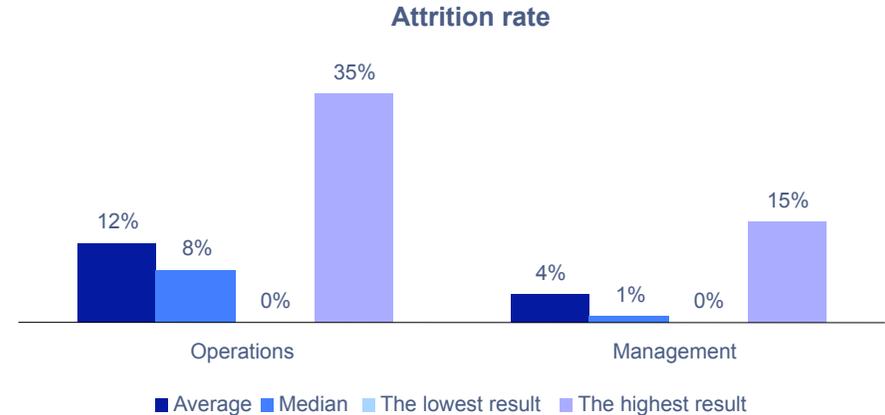
1.7 Number of managers on relevant management level

The chart presents average structure of management levels in the researched group.
Population: 12

Structure of management levels

AAA: 20% | 20% | 20% | 20% | 20%

Average: 66% | 11% | 16% | 3% | 3%

■ Team Leader / Process Leader   ■ Assistant Manager
■ Manager   ■ Senior Manager
■ Director

Thursday, September 10, 2009
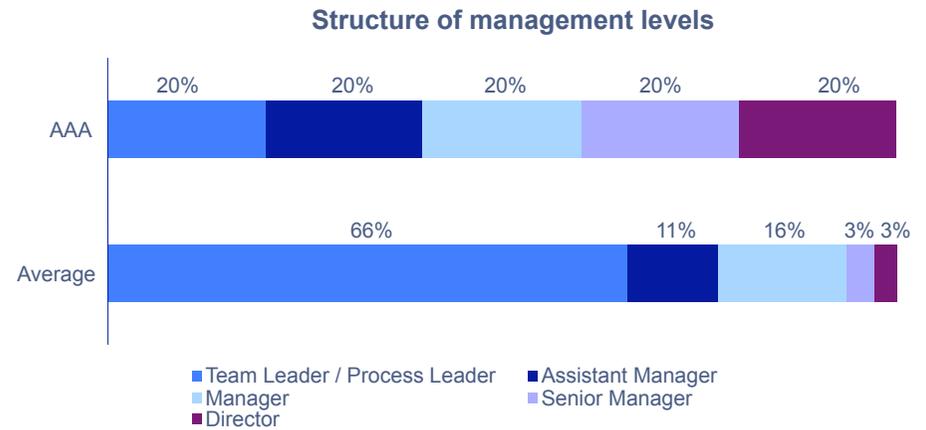
Section 1 - People

1.8 Staff structure

Male/Female
The chart presents the average percentage of male staff in compare to the median in the researched group.
Population: 12

Average age
The chart presents the average staff age in compare to the median in the researched group.

This result gives a ranking of Y within the researched group
Population: 11

Foreign staff
The chart presents the average percentage of foreign staff split by total headcount and management in compare to median in the researched group.
Population: 12

Gender structure

	Female	Male
Median	66%	34%
Average	66%	34%

Average age

Median	28,00
Average	27,82

Foreign staff %

	Average	Median
Managers	12%	3%
Total	6%	3%

Thursday, September 10, 2009
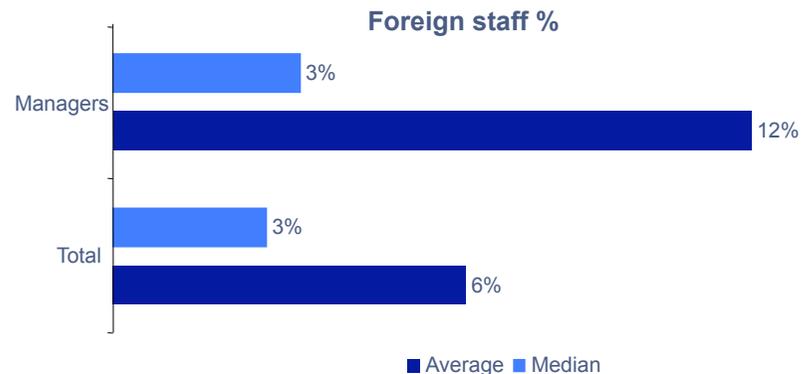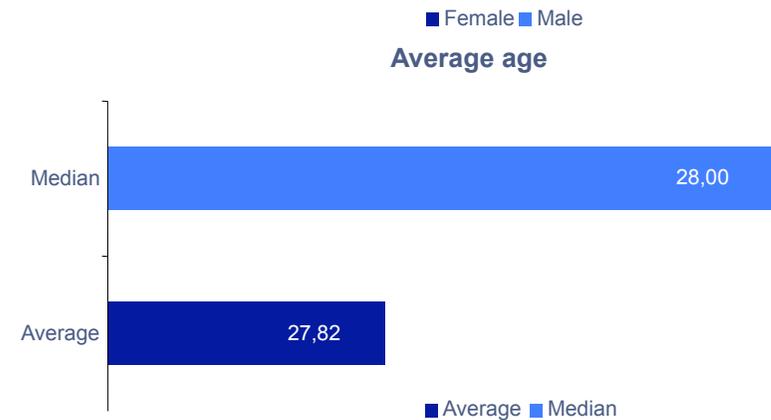
1.9 Staff recruitment

The chart presents the average percentage of staff recruited by a recruitment agency in compare to median in the researched group.
Population: 12

Recruitment Agency %

Thursday, September 10, 2009
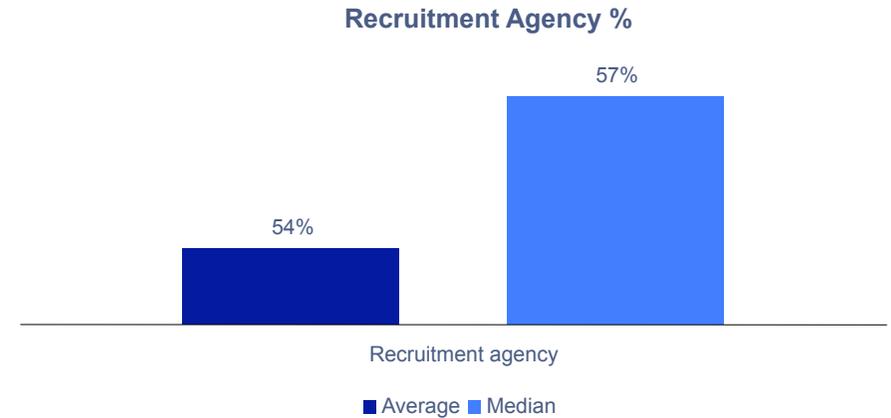
1.10 Staff education

The chart presents the average structure of educational background split by university degree, college degree and students in the researched group.
Population: 11

Average

8%

13%

- University
- College
- Students

79%
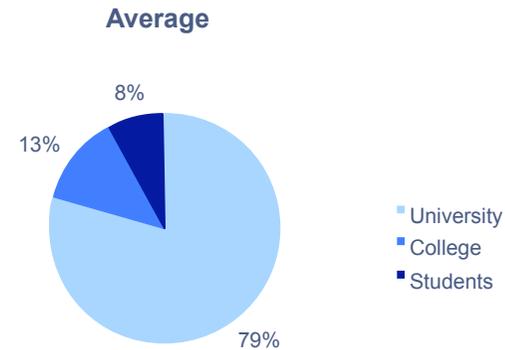
1.11 Staff living structure

The chart presents the average staff living structure in the researched group, split by: staff living in Krakow, staff living out of Krakow<20km and staff living out of Krakow>20km.
Population: 10

Average

12%

30%

58%

- Krakow
- Out of Krakow <20 km
- Out of Krakow >20 km

Thursday, September 10, 2009
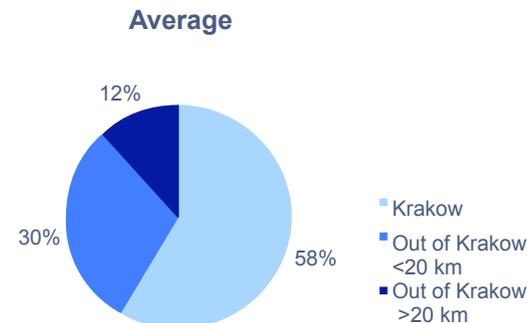
Section 2 – Cost Summary

2.1A Cost F&A Services
2.1B Cost HR Services
2.1C Cost IT Services
2.2 – 2.4 Financials

PricewaterhouseCoopers

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1A Cost F&A Services

Personnel cost; Gross salary

The table presents the average gross salary cost per grade in compare to the median in the researched group.

All values in cost section are presented in PLN '000 for Jan-Oct 2008

Level	Population	Average	Median
Junior Associate / Accountant	5	32,9	32,9
Associate / Accountant	6	42,1	40,6
Senior Associate / Accountant	5	52,8	43,4
Specialist	6	61,7	55,7
Senior Specialist	3	89,1	75,8
Blended Operational Staff	**7**	**49**	**49,9**
Team Leader	6	100,0	95,2
Assistant Manager	2	133,8	133,8
Manager	5	195,7	270,5
Senior Manager	5	189,8	245,6
Director	3	337,6	335,5
Blended Management	**6**	**164,9**	**154,5**
Total Blended Costs	**6**	**76,2**	**61,8**

Note:
Population in cost section is limited due to the lack of Information.

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1A Cost F&A Services

Personnel cost; Overtime

The table presents the average overtime cost per grade in compare to the median in the researched group.

Level	Population	Average	Median
Junior Associate / Accountant	5	1,7	1,3
Associate / Accountant	6	2,0	1,8
Senior Associate / Accountant	5	2,6	2,2
Specialist	6	3,2	2,6
Blended Operational Staff	**6**	**3,5**	**2,4**
Team Leader	6	1,8	1,5
Blended Management	6	0,7	0,4
Total Blended Costs	**6**	**3,3**	**2,2**

Overtime (PLN '000 Jan-Oct 08)

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1A Cost F&A Services

Personnel cost; Training costs

The table presents the average training cost per grade in compare to the median in the researched group.

Level	Population	Average	Median
Junior Associate / Accountant	4	1,9	1,7
Associate / Accountant	6	2,1	1,8
Senior Associate / Accountant	5	3,2	2,2
Specialist	6	3,0	2,4
Senior Specialist	3	4,6	3,4
Blended Operational Staff	**5**	**2,9**	**2,3**
Team Leader	6	3,6	2,7
Assistant Manager	2	2,4	2,4
Manager	6	4,5	3,6
Senior Manager	5	2,6	1,5
Director	3	4,1	5,2
Blended Management	**5**	**4,5**	**4,0**
Total Blended Costs	**5**	**3,1**	**2,4**

Training costs (PLN '000 Jan-Oct 08)

■Average ■Median

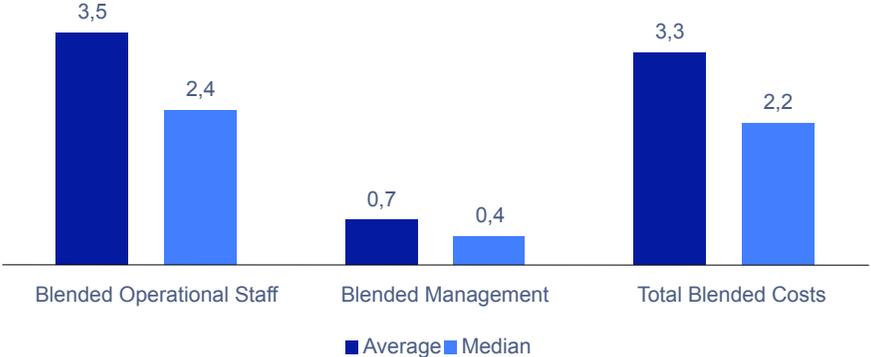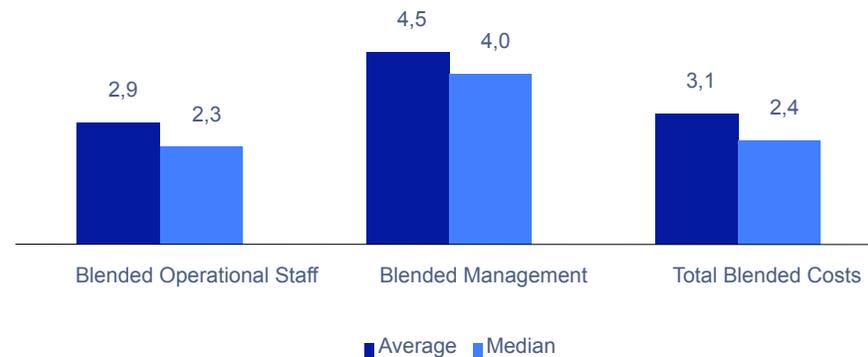Thursday, September 10, 2009

Section 2 – Cost Summary

2.1A Cost F&A Services

Personnel cost; Bonuses

The table presents the average bonus cost per grade in compare to the median in the researched group.

Level	Population	Average	Median
Junior Associate / Accountant	4	1,9	1,6
Associate / Accountant	6	2,7	2,8
Senior Associate / Accountant	6	3,3	3,7
Specialist	6	4,5	4,3
Senior Specialist	3	8,4	8,3
Blended Operational Staff	7	3,5	3,4
Team Leader	6	8,8	9,7
Assistant Manager	2	9,8	9,8
Manager	5	26,6	24,7
Senior Manager	5	34,7	29,5
Director	3	58,9	60,7
Blended Management	6	20,0	21,3
Total Blended Costs	7	6,2	5,5

Bonuses (PLN '000 Jan-Oct 08)

	Average	Median
Blended Operational Staff	3,5	3,4
Blended Management	20,0	21,3
Total Blended Costs	6,2	5,5

PricewaterhouseCoopers

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1A Cost F&A Services

Personnel cost; Other employee costs

The table presents the average of other employee costs per grade in compare to the median in the researched group.

Level	Population	Average	Median
Junior Associate / Accountant	4	0,84	0,88
Associate / Accountant	6	0,98	0,97
Senior Associate / Accountant	5	1,06	1,00
Specialist	6	0,98	0,97
Senior Specialist	3	1,18	1,00
Blended Operational Staff	5	1,06	1,00
Team Leader	6	1,15	0,98
Assistant Manager	2	1,1	1,1
Manager	6	1,15	0,97
Senior Manager	4	1,02	0,97
Director	3	1,16	1,00
Blended Management	5	1,26	1,00
Total Blended Costs	5	1,09	1,00

Other Employee Costs (PLN '000 Jan-Oct 08)

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1A Cost F&A Services

Personnel cost; Medical cover

The table presents the average medical cover cost per grade in compare to the median in the researched group.

Level	Population	Average	Median
Junior Associate / Accountant	4	2,81	1,44
Associate / Accountant	6	1,09	0,92
Senior Associate / Accountant	5	0,95	0,84
Specialist	6	1,11	0,92
Senior Specialist	3	1,05	1,00
Blended Operational Staff	6	2,03	0,92
Team Leader	6	1,29	1,07
Assistant Manager	2	1,4	1,4
Manager	5	1,32	1,30
Senior Manager	4	1,23	1,07
Director	3	0,99	0,84
Blended Management	5	1,14	0,84
Total Blended Costs	6	2,05	0,99

Medical cover (PLN '000 Jan-Oct 08)

	Blended Operational Staff	Blended Management	Total Blended Costs
Average	2,03	1,14	2,05
Median	0,92	0,84	0,99

■ Average ■ Median

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1A Cost F&A Services

Personnel cost; Life insurance

The table presents the average life insurance cost per grade in compare to the median in the researched group.

Level	Population	Average	Median
Junior Associate / Accountant	1	0,3	0,3
Associate / Accountant	3	0,33	0,36
Senior Associate / Accountant	3	0,40	0,36
Specialist	3	0,43	0,36
Senior Specialist	2	0,6	0,6
Blended Operational Staff	3	0,38	0,36
Team Leader	4	0,93	0,68
Assistant Manager	1	0,4	0,4
Manager	3	1,22	1,29
Senior Manager	2	1,0	1,0
Director	2	1,3	1,3
Blended Management	4	1,05	0,92
Total Blended Costs	4	0,41	0,32

Life insurance (PLN '000 Jan-Oct 08)
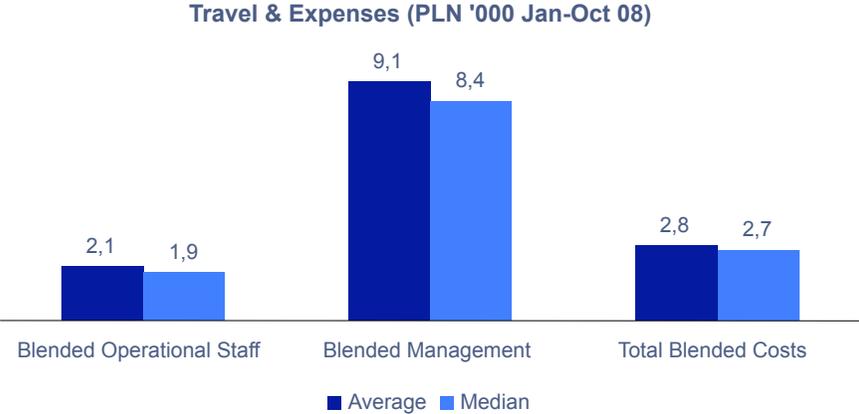
Thursday, September 10, 2009

2.1A Cost F&A Services

Personnel cost; Travel & Entertainment

The chart presents the average Travel & Entertainment cost split by blended operational staff, blended management and total blended costs in compare to the median in the researched group.
Population: 4

Travel & Expenses (PLN '000 Jan-Oct 08)

Thursday, September 10, 2009

2.1A Cost F&A Services

Infrastructure costs

The chart presents the average of total infrastructure costs split by: blended operational staff, blended management and total blended cost in compare to the median in the researched group.
Population: 6

Infrastructure costs (PLN '000 Jan-Oct 08)

Office costs

The chart presents the average of total office costs (Cost of office space lease and cost of other office costs per person [e.g. water supply, electricity, A/C, supplies]) split by: blended operational staff, blended management and total blended cost in compare to the median in the researched group.
Population: 6

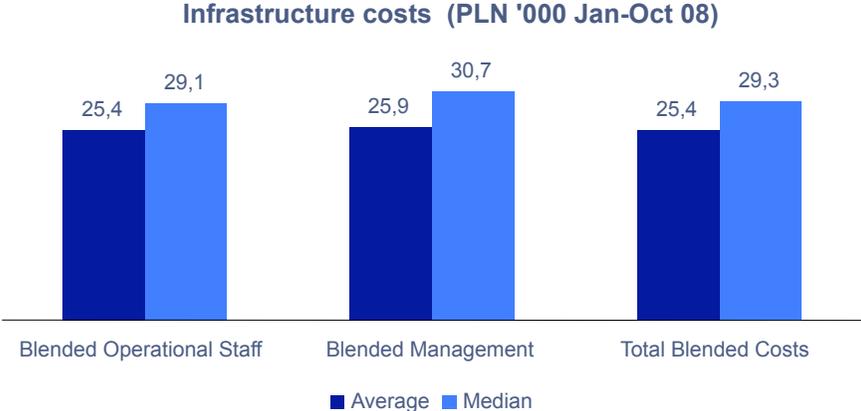**Office costs (PLN '000 Jan-Oct 08)**

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1A Cost F&A Services

IT costs

The chart presents the average of IT costs (IT infrastructure charge [software, hardware], Telecommunication and Connectivity) split by: blended operational staff, blended management and total blended costs in compare to the median in the researched group.
Population: 5

IT costs (PLN '000 Jan-Oct 08)

| Blended Operational Staff | Blended Management | Total Blended Costs |
| 11,5 / 11,6 | 12,1 / 11,6 | 11,6 / 11,6 |

■ Average ■ Median

Management costs

The chart presents the average of management costs (IT infrastructure charge [software, hardware], Telecommunication and Connectivity) split by: blended operational staff, blended management and total blended costs in compare to the median in the researched group.
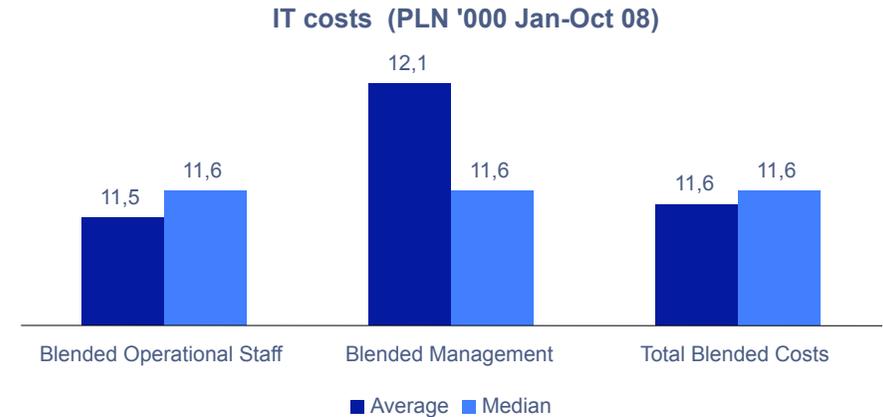*Population: 3 in operational and 4 in management and total blended.*

Management costs (PLN '000 Jan-Oct 08)

| Blended Operational Staff | Blended Management | Total Blended Costs |
| 5,9 / 5,6 | 33,7 / 14,5 | 8,9 / 10,7 |

■ Average ■ Median

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1A Cost F&A Services

Total cost per head

The chart presents the average of total cost per head split by: blended operational staff, blended management and total blended costs in compare to the median in the researched group.
Population: 6

Total costs per head (PLN '000 Jan-Oct 08)

	Blended Operational Staff	Blended Management	Total Blended Costs
Average	89,0	205,5	101,4
Median	82,8	218,5	96,9

■ Average ■ Median

Gross salary as a proportion of total cost per head

The chart presents the average gross salary as a proportion of total costs per head split by: blended operational staff, blended management and total blended costs in compare to the median in the researched group.
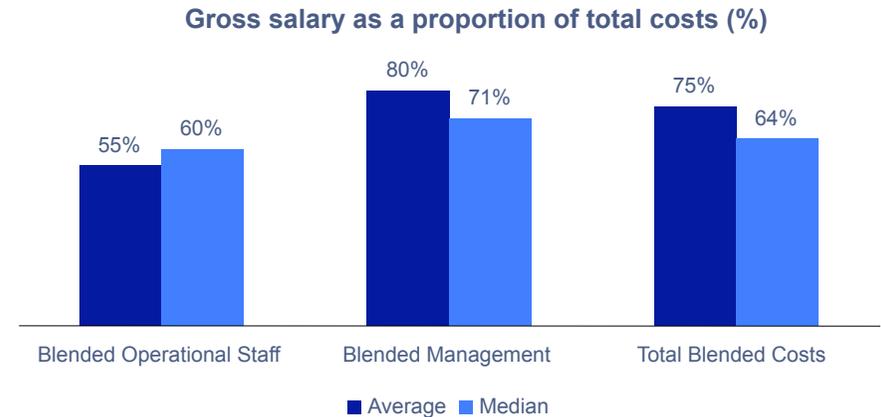*Population: 6*

Gross salary as a proportion of total costs (%)

	Blended Operational Staff	Blended Management	Total Blended Costs
Average	55%	80%	75%
Median	60%	71%	64%

■ Average ■ Median

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1B Cost HR Services

Personnel cost; Gross salary

The table presents the average gross salary cost per grade in compare to the median in the researched group.

All values in cost section are presented in PLN '000 for Jan-Oct 2008

Level	Population	Average	Median
Junior Associate / Accountant	2	30,43	30,43
Associate / Accountant	3	44,5	46,2
Senior Associate / Accountant	2	51,78	51,78
Specialist	2	62,72	62,72
Senior Specialist	3	80,2	82,2
Blended Operational Staff	3	54,0	46,5
Team Leader	3	83,1	75,8
Assistant Manager	2	115,56	115,56
Manager	2	173,03	182,33
Blended Management	3	115,8	102,6
Total Blended Costs	3	64,0	53,4

Note:
Population in cost section is limited due to the lack of Information.

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1B Cost HR Services

Personnel cost; Bonuses

The table presents the average bonus cost per grade in compare to the median in the researched group.

Level	Population	Average	Median
Junior Associate / Accountant	2	1,54	1,54
Associate / Accountant	3	2,94	3,09
Senior Associate / Accountant	2	4,36	4,36
Specialist	2	5,29	5,29
Senior Specialist	3	6,35	6,57
Blended Operational Staff	**3**	**4,29**	**4,29**
Team Leader	3	6,72	8,34
Assistant Manager	2	8,88	8,88
Manager	3	20,79	20,16
Blended Management	**3**	**11,92**	**7,03**
Total Blended Costs	**3**	**5,53**	**5,46**

Bonus (PLN '000 Jan-Oct 08)

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1B Cost HR Services

Personnel cost; Medical cover

The table presents the average medical cover cost per grade in compare to the median in the researched group.

Level	Population	Average	Median
Junior Associate / Accountant	2	0,44	0,44
Associate / Accountant	3	0,58	0,71
Senior Associate / Accountant	2	0,77	0,77
Specialist	2	0,77	0,77
Senior Specialist	3	0,60	0,71
Blended Operational Staff	3	0,70	0,71
Team Leader	3	0,54	0,63
Assistant Manager	2	0,55	0,55
Manager	3	0,52	0,53
Blended Management	3	0,50	0,51
Total Blended Costs	3	0,66	0,66

Medical Cover (PLN '000 Jan-Oct 08)

Thursday, September 10, 2009
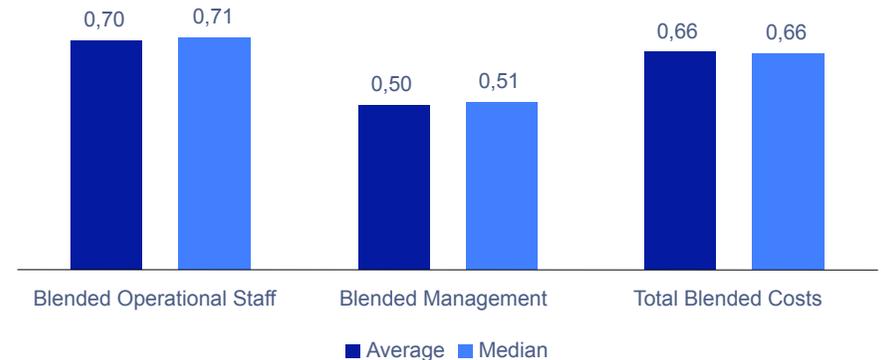
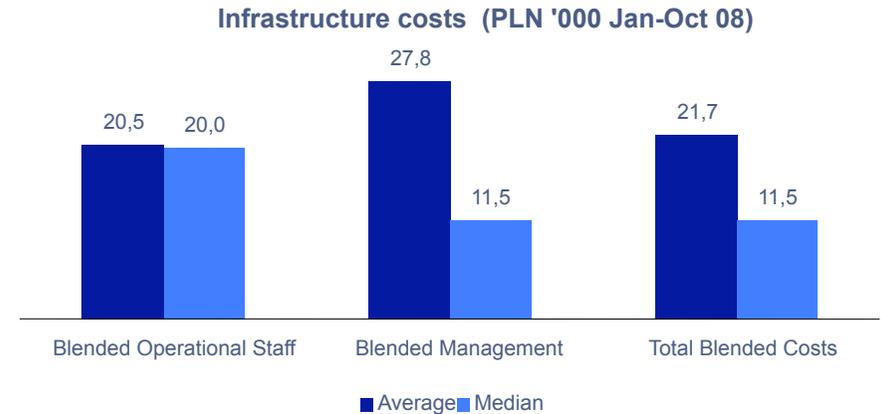## 2.1B Cost HR Services

Infrastructure costs

The chart presents the average of total infrastructure costs split by: blended operational staff, blended management and total blended cost in compare to the median in the researched group. *Population: 3*
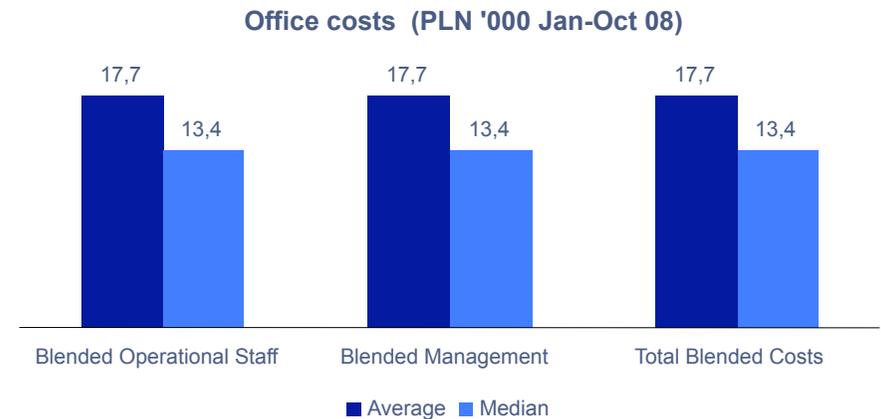
Infrastructure costs (PLN '000 Jan-Oct 08)

	Blended Operational Staff	Blended Management	Total Blended Costs
Average	20,5	27,8	21,7
Median	20,0	11,5	11,5

Average ■ Median

Office costs

The chart presents the average of total office costs (Cost of office space lease and cost of other office costs per person [e.g. water supply, electricity, A/C, supplies]) split by: blended operational staff, blended management and total blended cost in compare to the median in the researched group. *Population: 3*

Office costs (PLN '000 Jan-Oct 08)

	Blended Operational Staff	Blended Management	Total Blended Costs
Average	17,7	17,7	17,7
Median	13,4	13,4	13,4

Average ■ Median

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1A Cost HR Services

Total cost per head

The chart presents the average of total cost per head split by: blended operational staff, blended management and total blended costs in compare to the median in the researched group.
*Population: 3*

Total costs per head (PLN '000 Jan-Oct 08)

Gross salary as a proportion of total cost per head

The chart presents the average gross salary as a proportion of total costs per head split by: blended operational staff, blended management and total blended costs in compare to the median in the researched group.
Population: 3

Gross salary as % of total cost (PLN '000 Jan-Oct 08)

Thursday, September 10, 2009
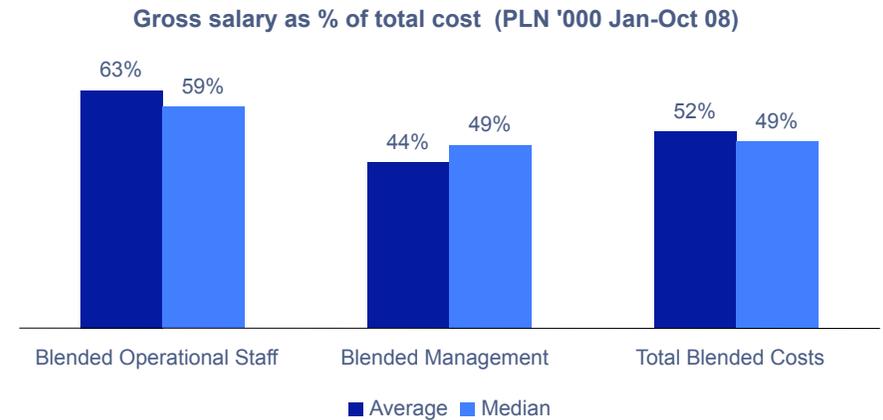
Section 2 – Cost Summary

2.1C Cost IT Services

Personnel cost; Gross salary

The table presents the average gross salary cost per grade in compare to the median in the researched group.

All values in cost section are presented in PLN '000 for Jan-Oct 2008

Level	Population	Average	Median
Junior Associate / Accountant	2	56,83	56,83
Senior Associate / Accountant	1	131,66	131,66
Specialist	3	87,2	105,6
Blended Operational Staff	3	91,4	101,0
Manager	1	130,08	130,08
Blended Management	1	75,31	75,31
Total Blended Costs	3	86,3	92,6

Note:
Population in cost section is limited due to the lack of Information.

Thursday, September 10, 2009

Section 2 – Cost Summary

2.1C Cost IT Services

Personnel cost; Medical cover

The table presents the average medical cover cost per grade in compare to the median in the researched group.

Level	Population	Average	Median
Senior Associate / Accountant	1	0,8	0,8
Specialist	3	0,73	0,80
Blended Operational Staff	3	0,58	0,61
Manager	1	0,8	0,8
Blended Management	1	0,46	0,46
Total Blended Costs	3	0,54	0,56

Bonus (PLN '000 Jan-Oct 08)

■ Average ■ Median
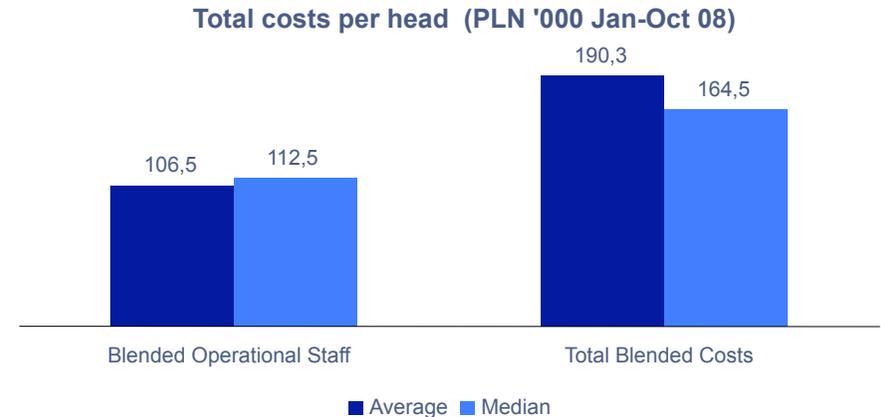
Thursday, September 10, 2009

Section 2 – Cost Summary

2.1C Cost IT Services

Total cost per head

The chart presents the average of total cost per head split by: blended operational staff and total blended costs in compare to the median in the researched group.
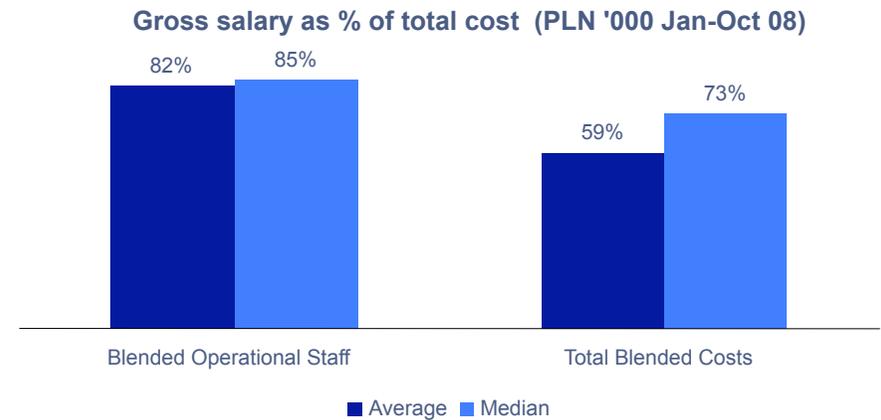*Population: 3*

Total costs per head (PLN '000 Jan-Oct 08)

Gross salary as a proportion of total cost per head

The chart presents the average gross salary as a proportion of total costs per head split by: blended operational staff and total blended costs in compare to the median in the researched group.
Population: 3

Note: Blended management in not available in HR section due to lack of data.

Gross salary as % of total cost (PLN '000 Jan-Oct 08)

Thursday, September 10, 2009

Section 2 – Cost Summary

2.2 – 2.4 Financials

Most of the researched group use 'cost plus' billing scheme.

Most of the researched group use PLN currency in billing services.

The chart presents the average of total running costs that are billed to clients in compare to median in the researched group.
Population: 7

Total annual running costs

Median	32 172
Average	59 959

■ PLN '000

The chart presents the average of total annual running cost per head in compare to median in the researched group.
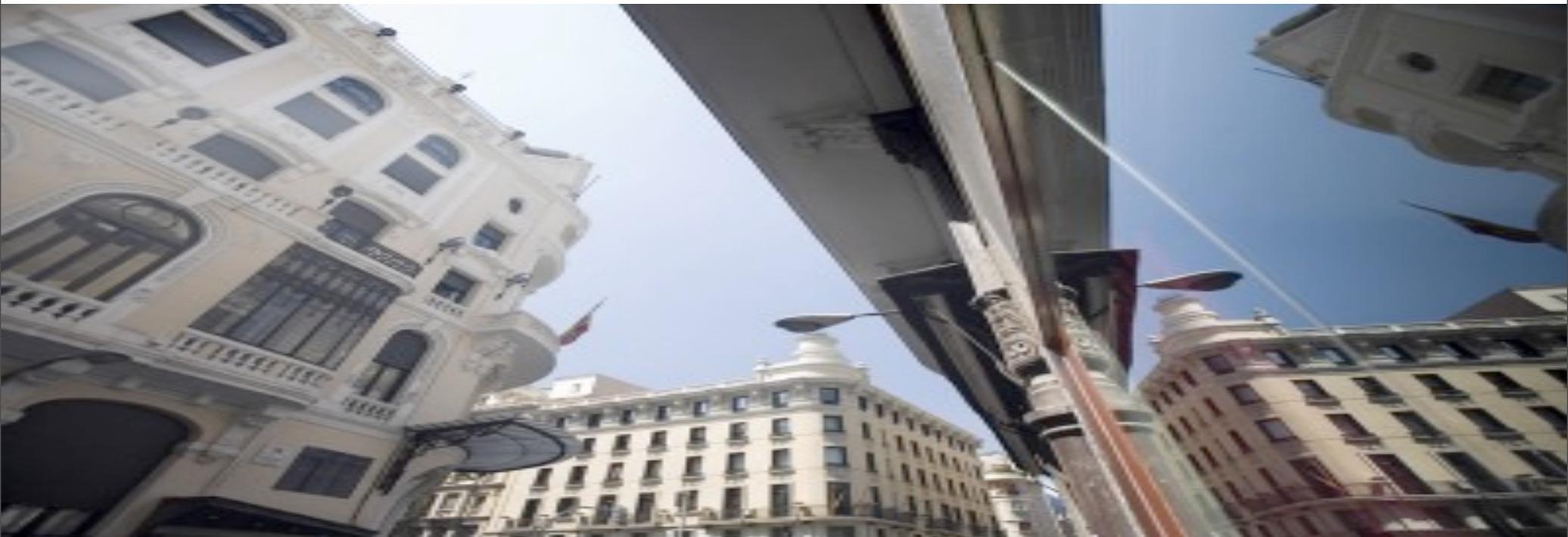*Population: 7*

Total annual running costs per head

Median	115
Average	148

■ PLN '000

Thursday, September 10, 2009
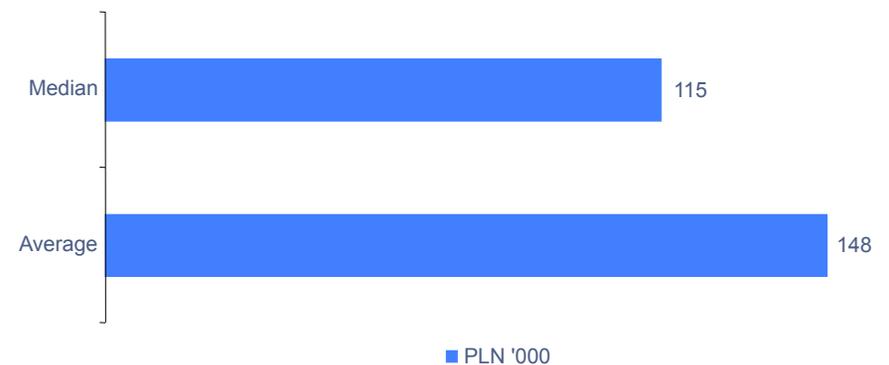
Section 3 – Location

3.1 - 3.5 Office location
3.6 - 3.7 Challenges

Thursday, September 10, 2009

3.1 – 3.5 Office location

Most of companies researched have got only one centre in Poland.

Researched group has been split by age into 4 groups:
- 0-2 year
- 3-5 years
- 6-10 years
- Over 10 years

Three researched company operates in Special Economic Zone (SSE).

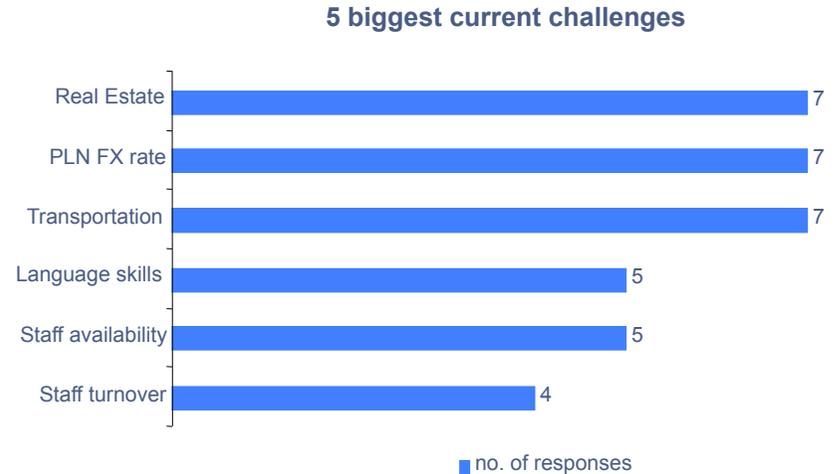All researched companies confirm they would select Krakow as location once again.
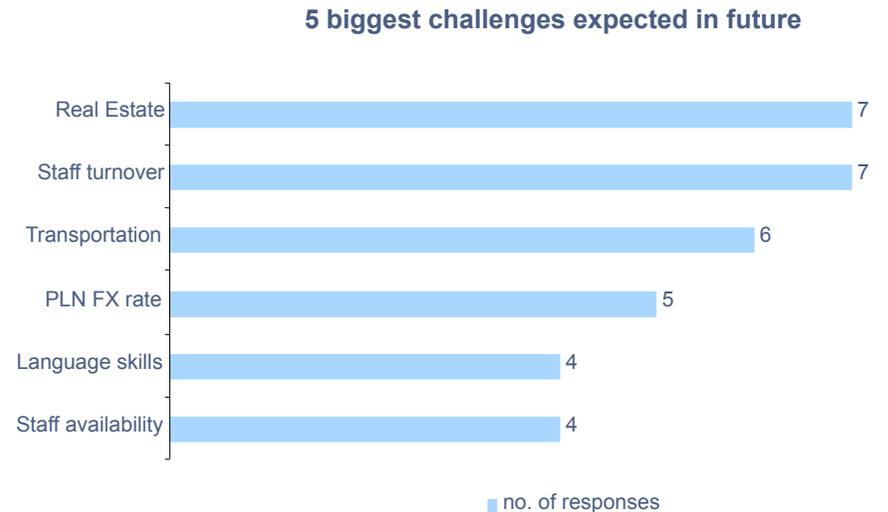*Population: 11*

Age of centres (years)

Thursday, September 10, 2009

3.6 – 3.7 Challenges

5 challenges pointed out most often by the researched group having the biggest impact currently.

5 biggest current challenges

Challenge	Responses
Real Estate	7
PLN FX rate	7
Transportation	7
Language skills	5
Staff availability	5
Staff turnover	4

■ no. of responses

5 challenges pointed out most often by the researched group that are expected to have the biggest impact in the future.

5 biggest challenges expected in future

Challenge	Responses
Real Estate	7
Staff turnover	7
Transportation	6
PLN FX rate	5
Language skills	4
Staff availability	4

■ no. of responses

Thursday, September 10, 2009

Section 4 – Other data

4.1 – 4.2 Scope
4.5 – 4.8 ERP platform and IT hardware
4.11 – 4.12 Languages

Thursday, September 10, 2009
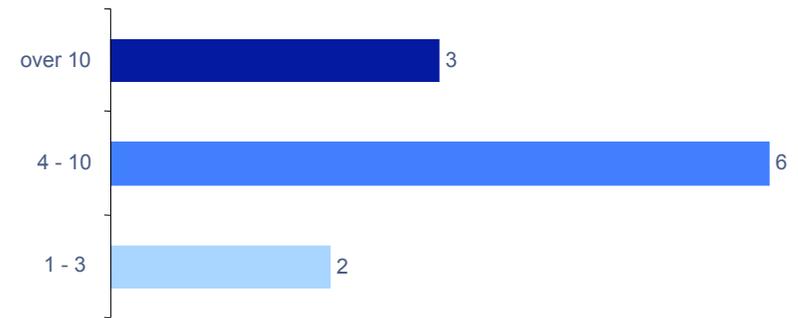
4.1 – 4.2 Scope

Number of centres providing service for many processes.

Number of centres providing service for many sectors.

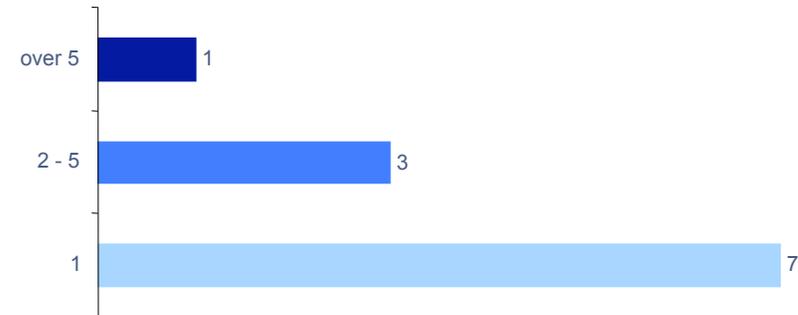The SSC/BPO centres in the research population provide services in 20 different processes:

Accounting		
Accounts Payable	Accounts Receivable	General Accounting
Fund Accounting	Fixed Assets	Tax
HR		
HR data processing	RPO (Recruitment outsourcing)	Training Administration
Payroll	Pensions Administration/ Investment	Reward and Retain and Mobility
IT		
IT Development	IT Support / Helpdesk	Business Database Maintenance
Other		
Call Centre Activities	Customer Service	Procurement
Revenue Recognition	Knowledge Process Outsourcing (KPO)	

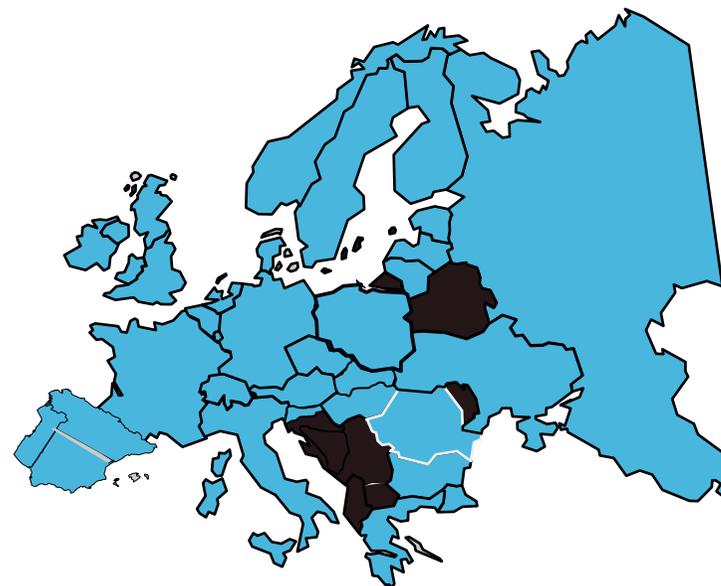**Number of centres providing many processes**

over 10	3
4 - 10	6
1 - 3	2

Number of centres providing for many sectors

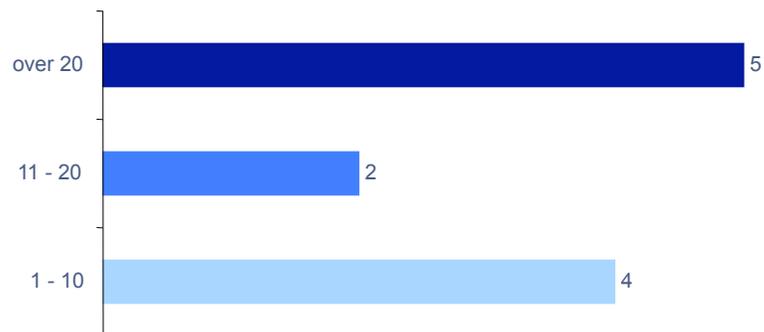|	
over 5	1
2 - 5	3
1	7

Thursday, September 10, 2009

Section 4 – Other data

4.1 – 4.2 Scope (cont.)

The SSC/BPO centres in research group provide services for domestic and international clients present in 38 countries from 5 continents.

Number of centres providing for many countries

over 20	5
11 - 20	2
1 - 10	4

Non-European countries in scope

- Australia
- Canada
- Israel
- Kazakhstan
- South Africa
- Turkey
- United Arabic Emirates
- United States

Thursday, September 10, 2009

Section 4 – Other data

4.5 – 4.8 ERP platform and IT hardware

5 centres use a common ERP platform.
Population: 9

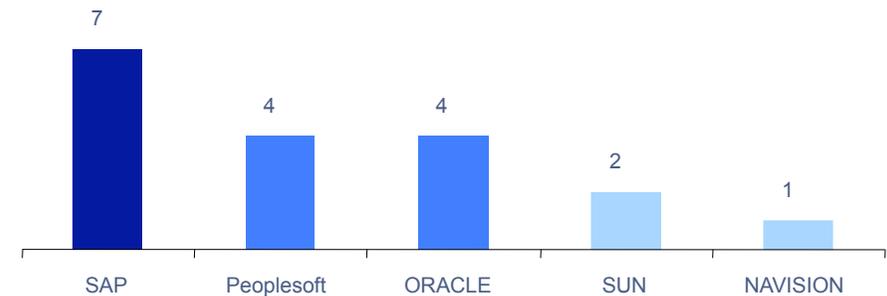The most popular platform in use within researched group is SAP.
Population: 9

Number of centres using ERP platform

7 centres lease their PCs.
Population: 8

Thursday, September 10, 2009

Section 4 – Other data

4.11 – 4.12 Languages

The chart presents the average percentage of staff speaking a minimum of 2 foreign languages, in compare to the median in the researched group
Population: 11

% of staff speaking min. 2 foreign languages
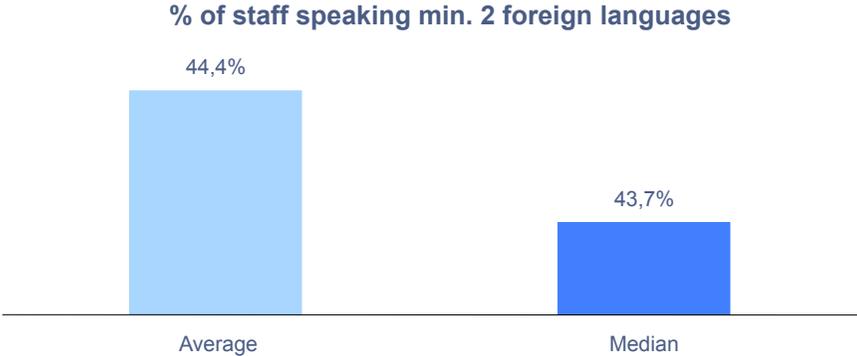
The chart presents the total number of staff speaking particular languages in the researched group.

Language	Total	AAA	AAA %
English	4788		
German	816		
French	473		
Russian	180		
Spanish	148		
Hungarian	52		
Italian	10		

Thursday, September 10, 2009

Summary

People:

PEOPLE:	Population	Average	Median
Headcount	11	584	260,5
Headcount change	11	62%	124%
FTE: Management as % of total	12	12%	10%
FTE: Support as % of total	12	9%	6%
Days spent on:			
Sickness leave (operations)	12	7	6
Sickness leave (management)	12	5	2
Maternity leave (operations)	8	20	2
Maternity leave (management)	7	16	2
Vacation (operation)	11	16	-
Vacation (management)	11	15	-
Trainings (operations)	10	5,8	-
Trainings (management)	10	5,7	-
Attrition rate (operations)	11	12%	8%
Attrition rate (management)	11	4%	1%
Staff structure:			
Female	12	66%	66%
Male	12	34%	34%
Average age	11	27,82	28,00
Foreign Manager staff %	12	12%	3%
Foreign total staff %	12	6%	3%
Recruitment agency %	12	54%	57%
Staff with university grade	11	81%	85%
Staff living in Krakow	10	58%	70%
Staff living within 30 minutes journey to the office	10	30%	18%
% of staff speaking min. 2 foreign languages	11	44%	44%

Thursday, September 10, 2009

Summary

Costs F&A:

COSTS:	Population	Average	Median
Data by total blended costs:			
Gross salary	6	76,2	61,8
Training cost	5	3,1	2,4
Bonuses	7	6,2	5,5
Other employee costs	5	1,09	1,00
Medical cover	6	2,05	0,99
Life insurance	4	0,41	0,32
Travel & Entertainment	4	2,8	2,7
Infrastructure	6	25,4	29,3
Office	6	14,4	11,6
IT cost	5	11,6	11,6
Management costs	4	8,9	10,7
Total cost per head	6	101,4	96,9
Gross salary as a proportion of total cost per head	6	75%	64%
Total annual running costs	7	59,959	32,172
Total annual running costs per head	7	148	115

Thursday, September 10, 2009

Summary

Costs HR:

COSTS:	Population	Average	Median
Data by total blended costs:			
Gross salary	3	64,0	53,4
Bonuses	3	5,5	5,5
Medical cover	3	0,66	0,66
Infrastructure	3	21,7	11,5
Office	3	17,7	13,4
Total cost per head	3	123,2	108,0
Gross salary as a proportion of total cost per head	3	52%	49%

Thursday, September 10, 2009

Summary

Costs IT:

COSTS:	Population	Average	Median
Data by total blended costs:			
Gross salary	3	86,3	92,6
Medical cover	3	0,54	0,56
Total cost per head	3	190,3	164,5
Gross salary as a proportion of total cost per head	3	59%	73%

Thursday, September 10, 2009

SBPL contact details:

Andrew Hallam
Managing Director
Mob: +48 513 077 541
E-mail: Andrew@spbl.pl

PwC contact details:

Adam Jamioł
Senior Manager
Mob: +48 502 184 720
E-mail: Adam.Jamiol@pl.pwc.com

Jan-Oct 2008

PwC

Thursday, September 10, 2009