

SCANDINAVIAN COMPANIES FROM THE BUSINESS SERVICES SECTOR IN POLAND

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FOREWORD SPCC

The Business Services Sector (BSS) is developing rapidly in Poland. During the past years the number of investments in this area has noted a significant growth.

The Scandinavian-Polish Chamber of Commerce has been observing this development and new Scandinavian investments in the sector with great interest. According to our data, close to 60 companies from Scandinavia have already located its business services centers in our country. Those units either work for parent companies or offer business services to external customers and clients. Some of them combine both functions in their operations.

In the publication we present the results of a survey carried out among Scandinavian companies from the Business Services Sector operating in Poland. Through the survey we have been trying to answer the question if Scandinavian companies operating in this sector have created their own business model of doing business, are there any specific features that dis-

tinguish them from the competitors and make them more attractive as an employer and business partner? We indicate the key factors that attracted Scandinavian investors and influenced their decision to locate their business service centers in Poland. In the report we also present examples of the Scandinavian business service centers that successfully operate on the Polish market.

We would like to thank our content partner the Pro Progressio Foundation, partners Kinnarps and Vastint as well as the honorary patron the Polish Information and Foreign Investment Agency for cooperation and valuable contribution.

We hope that this report will serve as an interesting source of information about the Scandinavian companies from the Business Services Sector.

Agnieszka Kowalcze
Director

Roger Andersson
Chairman



FOREWORD PRO PROGRESSIO

It seems that all has already been said about the outsourcing services and modern business services market. But these services are still developing fast year by year - the investment from BSS sector constitutes the biggest share of foreign direct investment flow to Poland. The rate of employment in the sector and the creation of new workplaces is noting a stable growth rate of 20% every year.

In Poland, as well as in Europe and the rest of the world, the issues connected with BPO (Business Process Outsourcing) and SSC (Shared Service Centers) are constantly present in the media and play a crucial role in the economic development of many countries. Poland is one of the global leaders in this sector and is strengthening its position year by year. Great geolocation of Poland is an important factor, which helps the new investors to develop fast on the Polish market. Denmark, Finland, Norway and Sweden are

countries which constantly develop their operations in Poland. The Scandinavian investors bring new standards of quality, they are focused on the People Agenda and creation of the work environment, which can serve as an example to other entrepreneurs. Besides of course, they create new workplaces.

In this publication together with SPCC we collected and analyzed the data dedicated to the Scandinavian investments from the Business Services Sector. We hope that on the following pages will provide interesting facts and knowledge about the presence of Scandinavian investors from the sector of modern business services in Poland.

Wiktor Doktor
Chairman

1 POLAND AS AN INVESTMENT LOCATION FOR BSS SECTOR



“If there is something we cannot do better, cheaper and more efficiently than our competitors, there is no point in doing it and we should hire to do this work someone who will do it better than us.”

Henry Ford

The past decade has been a time of a dynamic growth for the Polish economy. Among other factors we should take into account innovative investments that have been carried out by foreign companies, as well as the local entrepreneurs in various branches of the economy. However the most dynamic growth - on average of 15% - in terms of turnover and the employment - has been observed in the Business Services Sector. The industry that began its spectacular development just in the past decade, now can boast employment of over 150 thousand, as presented in the report *10 years of the business services sector in Poland*¹, prepared by the Polish Information and Foreign Investment Agency (PAIIZ) and Hays Poland.

In common understanding the sector is often associated with unidimensional concept of outsourcing. However it must be emphasized, that the activities performed within the BSS are of

certainly more complex character. There are four categories to be distinguished within the business services sector: **SSC** - Shared Services Centers that are created as internal (captive) part of the corporation, and are the top employer within the sector (over 57.5 thousand employees), **BPO** - business process outsourcing vendors, which perform business services for other companies, **IT** mostly understood as infrastructure and applications management (23% of the total sector's employment) and last but not least **R&D** (research and development facilities that account for the 11% of employment and of number of facilities in the sector).

Over the past 10 years Poland has become unquestionable leader in the BSS services in the region of Central and Eastern Europe, both in the total number of centers created (650 from the total of 1000 established in the CEE region) and the employment (45% out of 330 thousand of BSS's employees). It is worth con-

¹ The publication was developed based on the analysis of the database, comprising 659 companies with foreign and Polish shareholding, which create workplaces in this type of centers in the whole country.



sidering what were the factors facilitating this spectacular achievement.

The key factor standing behind each and every successful BSS investment is access to highly qualified employees who are multilingual and have specialized background. Poland with its 430 higher education institutions, as well as 1.5 million students is the deepest market in this part of Europe. Human resources appear as the top criterion in the location's selection, nevertheless the investors emphasize also other aspects, such as: accessibility, reliable IT infrastructure, vast offer of modern office space, support of local authorities, attractive incentives schemes and high life quality. The Polish offer meets the investors' expectations, what has resulted in a dynamic growth of the BSS sector in our country.


Hence, it will not come as a surprise that in the past years Poland has emerged as a mature market, which hosts over 650 Polish and foreign companies in 23 different cities. The following 11 locations can boast of at least 10 BSS: Krakow, Warsaw, Wroclaw, Lodz, Katowice Urban Area, Tricity (Gdansk, Gdynia, Sopot), Poznan, Bydgoszcz, Lublin, Rzeszow and Szczecin. Centers located in those cities employ nearly 98% of all industry's workforce. Referring to the number of centers, Warsaw dominates with 133 companies, Katowice agglomeration take the second place (83 centers), closely followed by Krakow with its 78 centers. Noteworthy, Krakow has the highest share (20%) of the total employment within the sector. In this city, the capital of Lesser Poland Voivodship, as much as four companies hire over 2 thousand employees each (Capgemini,

Shell BSC, Comarch and State Street Corporation).

Over 32% of the total of business service centers located in Poland are owned by Polish entities. It's been the foreign companies who have been the pioneers within the sector and have strongly contributed to the sector's spectacular growth. Among the foreign companies the American enterprises have been the most active on the Polish market, having created as much as 155 BSS centers. 68 of those were Shared Services Centers, employing over 21 thousand people, and R&D centers having the 22% share.

The second major group of BSS foreign investors are Nordic based companies: Danish, Norwegian, Finnish and Swedish, accounting for creation of 64 centers that employ around 10 thousand people. Not surprisingly, most of the Nordic companies located their businesses at the seacost, in Tricity (10) and Szczecin (9). However, Warsaw is still a popular destination with 11 centers and is closely followed by Kraków (6) and Wrocław (6). Those companies usually decide to operate in our country as Shared Service Centers, as well as IT centers with vast range of activities.

There are two features characterizing companies with foreign shareholding in Poland. Firstly, to minimize the risk exposure, their operations in Poland start with relatively limited scope of covered countries, and small-scale pilot projects. However, taking advantage of the available talent pool quality, most entrepreneurs grow their centers quickly, also expanding their processes portfolio. Initially regional centers are turned into global ones, providing



services to clients (internal and external) in both Americas and even in Asia. Gradually, rendered services become more and more complex. In the next stage, many entities are leveraged up to the center of excellence status. Those centers are responsible for setting business trends and standards which are later implemented in the global network of multinational corporations.

Secondly, business services companies tend to reinvest in Poland. Such endeavors make up for nearly 60% of all the projects completed with assistance of PAlilZ in a given year, on average.

The above mentioned confirms that the industry constantly evolves, heading into the most desirable direction. BSS centers extend their scope of operations providing more complex processes (e.g. advanced financial and business analysis or development of sophisticated data processing tools). Competitiveness of Poland is no longer based just on low cost, but

is increasingly associated with services quality.

For last 10 years the position of BSS industry among those supported by PAlilZ has been consistently growing. Currently the Agency services 169 potential projects, with total investment expenditure of more than EUR 3,6 billion, whereas the employment may result in 32,5 thousand new jobs. 42% of those projects represent business services sector with almost 14 thousand possible job positions. In the last ten years, the share of BSS projects in PAlilZ portfolio has increased dynamically. In 2004 the share was only 5%. Last year the Agency completed 54 projects which may generate almost 9 thousand jobs with financial commitment of EUR 2 billion. BSS industry accounted for 26 out of 54 investment projects. Those are expected to create 4,6 thousand new workplaces.

Polish Information
and Foreign Investment Agency



2 SCANDINAVIAN BPO AND SSC INVESTMENTS IN POLAND - RESULTS OF THE SPCC AND PRO PROGRESSIO SURVEY



The Business Process Outsourcing (BPO) and Shared Services Centers (SSC) industry is one of the leading foreign direct investments developing in Poland within last decade. The services known as modern business services or Business Support Services (BSS) are becoming more and more popular and are on the top of the list of Polish cities when it comes to required investors which have significant impact on the market growth.

The BPO and SSC companies are creating thousands of workplaces each year. According to Pro Progressio Foundation market analysis, in the third quarter of 2015 the industry employed nearly 190.000 employees (in both foreign and Polish companies). The large employment in the modern business services sector has strong impact on the office real estate industry in all Polish cities which are chosen by the companies as the location of operation centers. Within the group of office buildings developers, there are Scandinavian companies which build modern A-Class buildings with complete and flexible offer for BPO and SSC tenants. Among the market leaders are such developers as Vastint or Skanska Property Poland. The office buildings of those developers are located in the most preferable BPO and SSC destinations like Warsaw, Cracow, Wroclaw, Lodz, Poznan, Szczecin or Katowice. The location with a very dynamic growth, which so far has not been chosen by Scandinavian devel-

opers is Tricity but there are plans for changing this situation in the coming years.


In mid of 2015 Scandinavian-Polish Chamber of Commerce together with Pro Progressio Foundation conducted a market survey among BPO and SSC companies with foreign capital from Scandinavia. There were 52 identified companies who have offices in 16 cities (64 operation centers).

The Scandinavian modern business services centers have 7% market share (according to Invest in Poland Agency there were 659 operation centers in the Q2 of 2015 in Poland) in all BPO and SSC centers with foreign capital in Poland.

GENERAL INFORMATION ABOUT THE SCANDINAVIAN INVESTMENT IN THE SECTOR

Location of Scandinavian BSS centers

The most preferable locations for BPO and SSC Centers of Scandinavian companies are cities from Northern Poland, where 19 centers are located - Tricity (10 centers) and Szczecin (9), but also Warsaw is a very popular destination with 11 centres, Cracow (7) and Wroclaw (6).



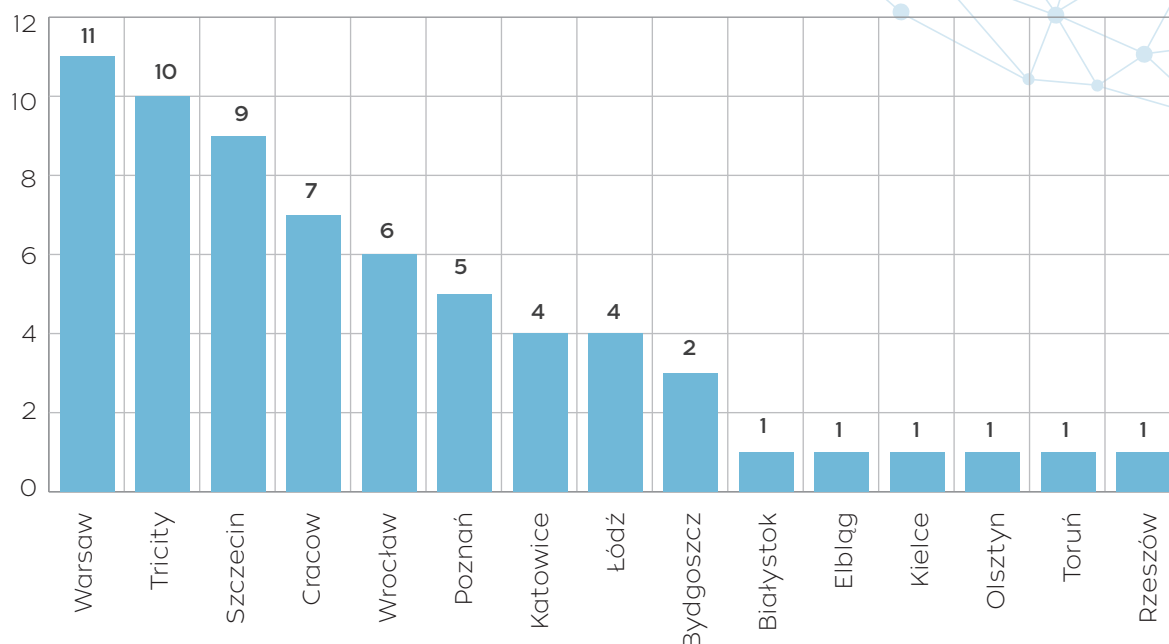


Chart 1. The location of Scandinavian BPO/SSC/R&D centers in Poland

Scandinavian investment by the country of origin

Most of the investors came to Poland from Sweden (21 locations in Poland) and Finland (17), but there are also investments of mixed Scandinavian origin as well as mixed Scandinavian/Polish.

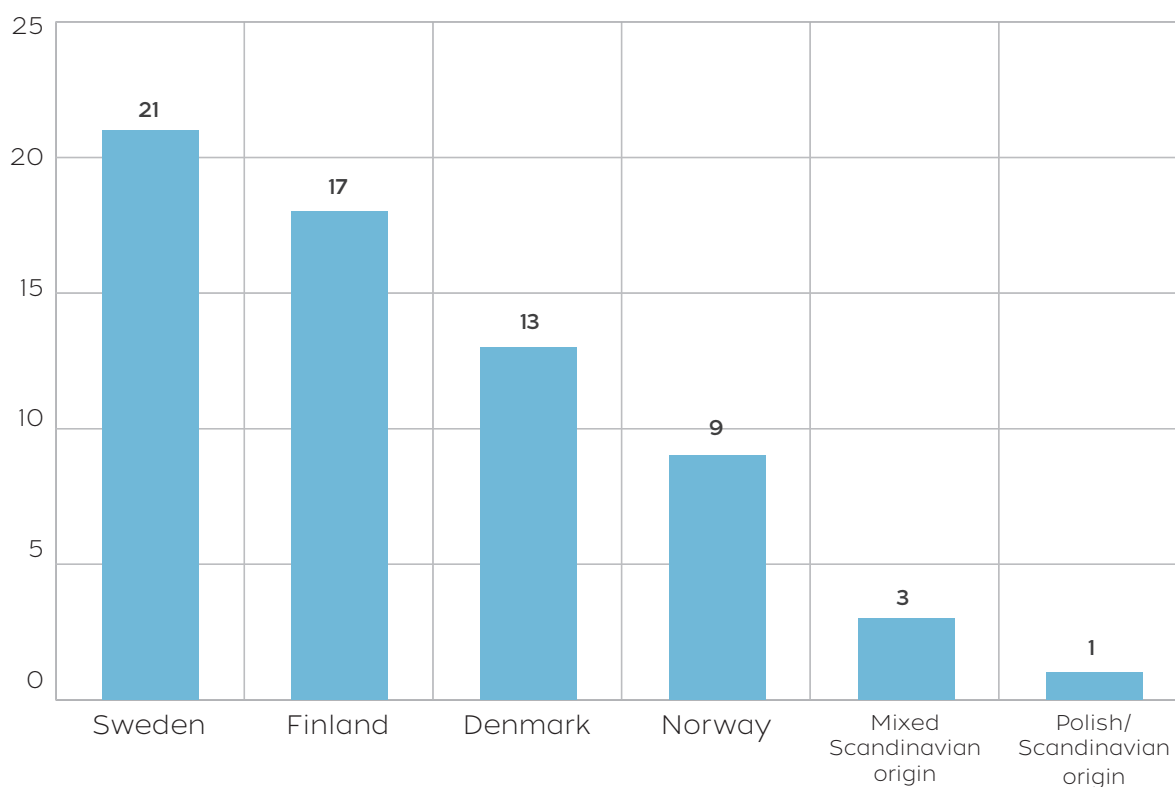


Chart 2. Scandinavian investors from the BSS sector by the country of origin

The survey also included detailed questions, which were answered by around 40% of the BPO/SSC companies (21 companies out of 52). The analysis of the received data enabled to get the profile of Scandinavian investors present in Poland. The following graphs and descriptions are presenting the results of the survey.

SCANDINAVIAN INVESTMENT IN THE BSS SECTOR - RESULTS OF THE SURVEY

Types of operation activities

Among modern business services there are a number of sub categories which define the exact scope of activities of the companies. However, they may be grouped within master categories, which include BPO (Business Process Outsourcing), SSC (Shared Service Center), R&D (Research and Development Center) and ITO (IT Outsourcing Centers). The most popular Scandinavian investments are SSC (48%), followed by BPO (30%), R&D (19%) and ITO (4%). Some of the investments combine few categories of operations (for example BPO and SSC).

BSS - Business Support Services. The group of services companies including BPO, SSC, R&D and IT services providers.

■ **BPO** - Business Process Outsourcing. Companies from the service sector providing services to external clients. The BPO services can be defined in more details and include for example F&A - Finance and Accounting, HRO - Human Resources Outsourcing, LPO - Legal Process Outsourcing, CCC - Call Contact Center and many others.

■ **SSC** - Shared Services Centers. The group of companies similar to BPO but providing services within one corporation. The most popular BSS type of companies in Poland.

■ **R&D** - Research and Development. The companies with main focus on is on conducting research activities and product or software development.

■ **IT (Information Technology)** - also defined as ICT (Information and Communication Technology) or ITO (Information Technology Outsourcing) refers to providers of IT services for external clients. ITO includes providing services referring to hardware, infrastructure and software.

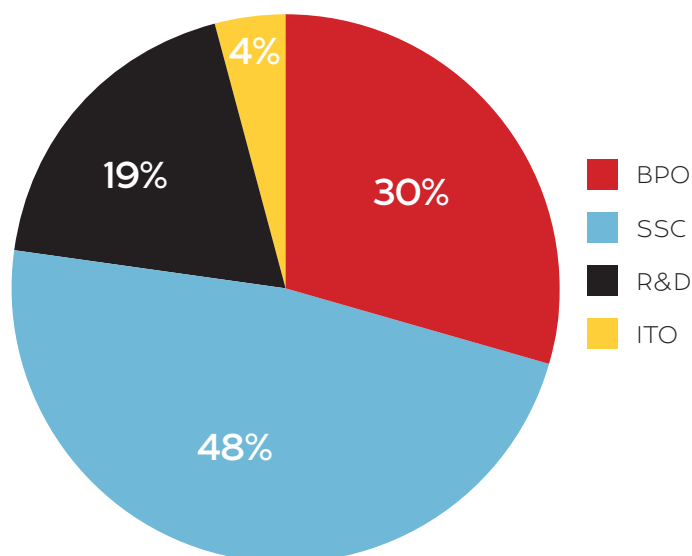


Chart 3. Type of operations

Categories of served processes

There are a number of processes being supported in the Scandinavian operation centers. The most popular services being supported from Poland are Finance and Accounting (20% of all processes) and IT (20%). Besides the typical IT services the separate category of software development (8%) was identified.

F&A and IT related processes constitute nearly 50% of all activities run within Scan-

dinavian operation centers, although there are many more such as human resources outsourcing, supply chain and purchasing, customer service (including Call and Contact Center) or legal services. There are also some other processes being served by the companies (Technical Documentation Creation and Translation, Global Risk and Compliance, Strategic Planning and Continuous Improvement, Claims handling, Customs). Around 76% of surveyed companies serve more than one process in their centers, some even up to 5 processes.

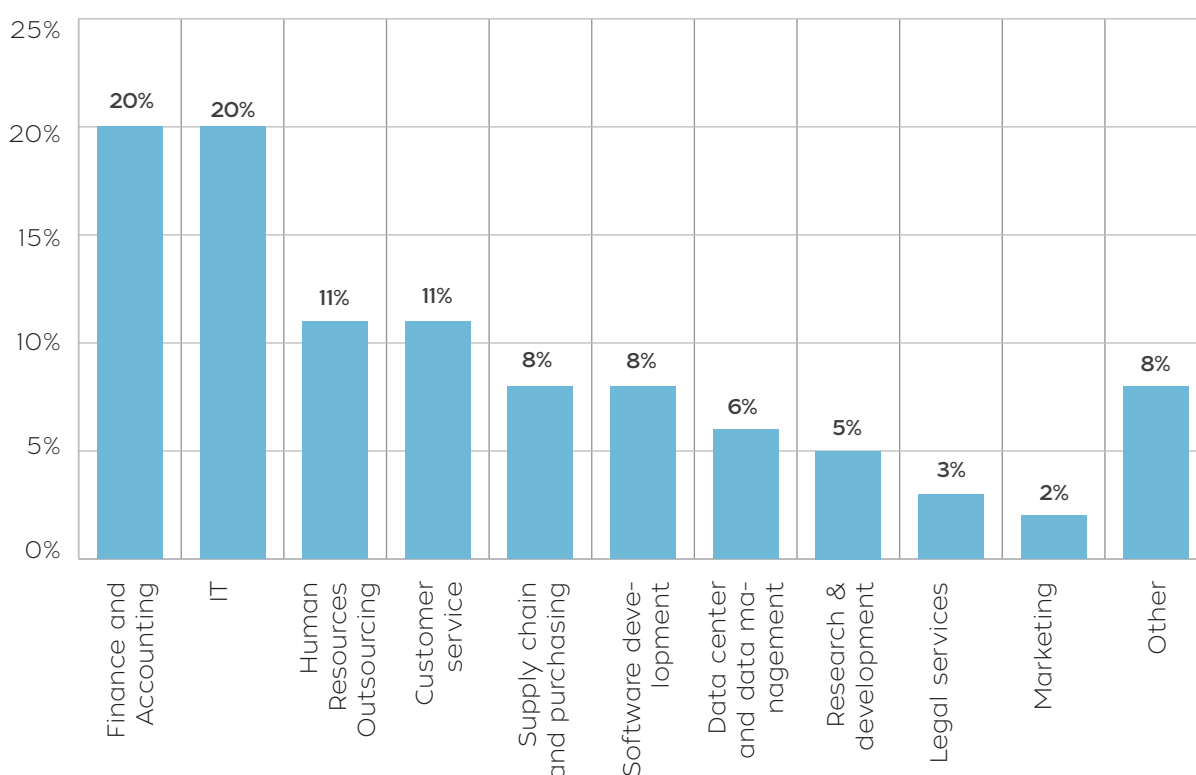


Chart 4. Categories of served processes

Languages used in Scandinavian BSS Companies

In the survey there was also a certain attention put on the languages and the usage of them in operation processes. As the companies are located in Poland there was no surprise to find out that in each

operation center Polish language is being used. The second language being used in all Scandinavian companies in Poland is English. Scandinavian languages are also widely represented with the slight prevalence of Finnish and Norwegian over Danish and Swedish.

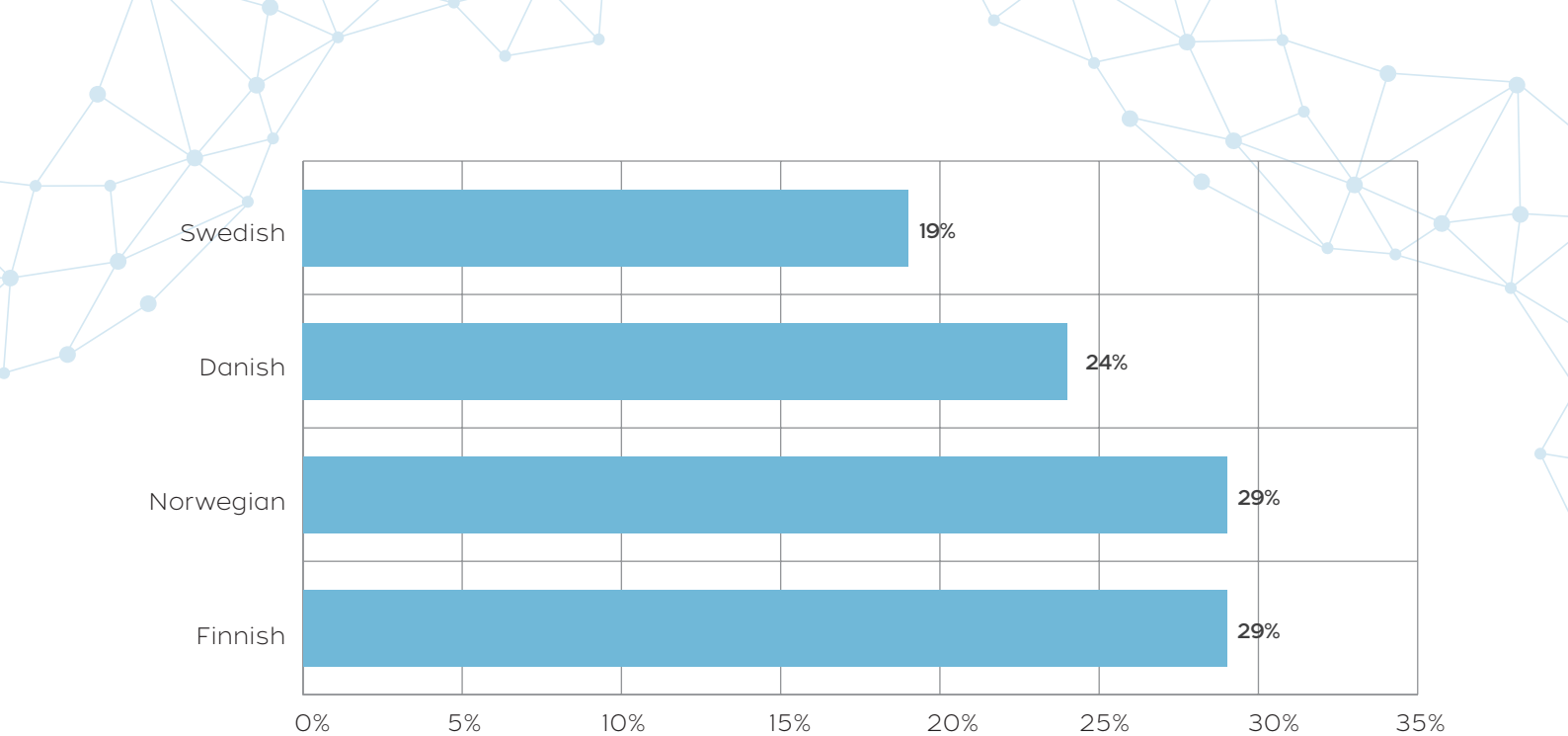


Chart 5. Scandinavian languages used in Scandinavian BSS Centers in Poland

As the Scandinavian BSS companies in Poland are supporting international markets, the communication in foreign languages is a must. Most of the operation centers operate in English, but there are

also companies which provide services in ten and more languages. There were two companies identified which operate in fifteen languages.

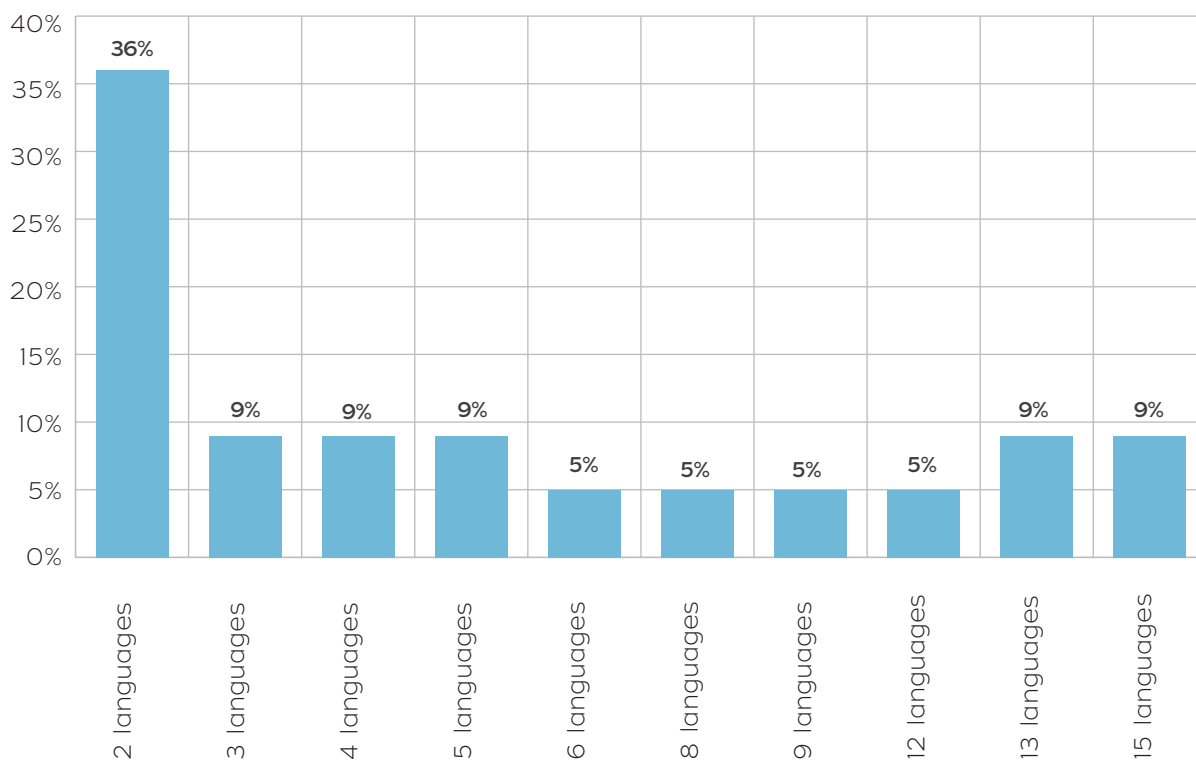


Chart 6. Number of foreign languages used in Scandinavian BSS Centers in Poland

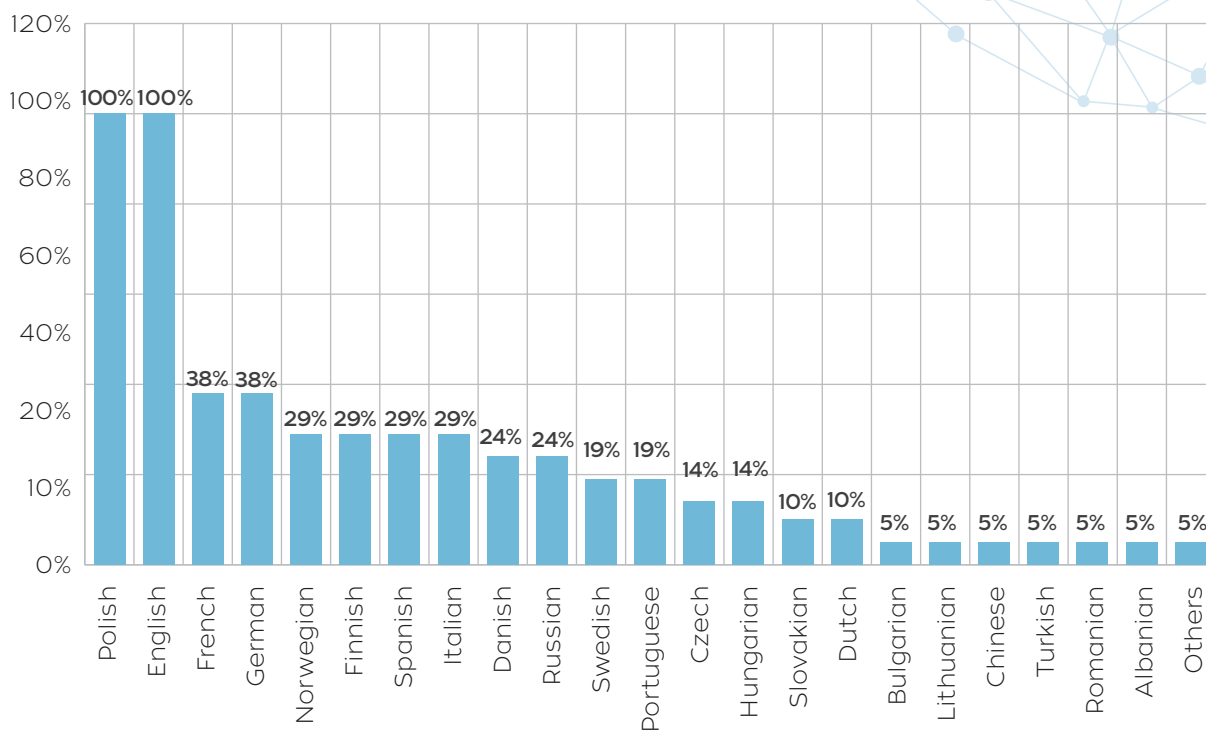


Chart 7. Foreign languages used in Scandinavian BSS Centers in Poland

In September 2015 Pro Progressio Foundation has published a report dedicated to foreign languages studies in Poland. One of the analysis of this publication presents the number of universities where

foreign languages are being taught. The deeper analysis has shown that all languages used in Scandinavian BSS centers are being taught in the Universities in Poland.

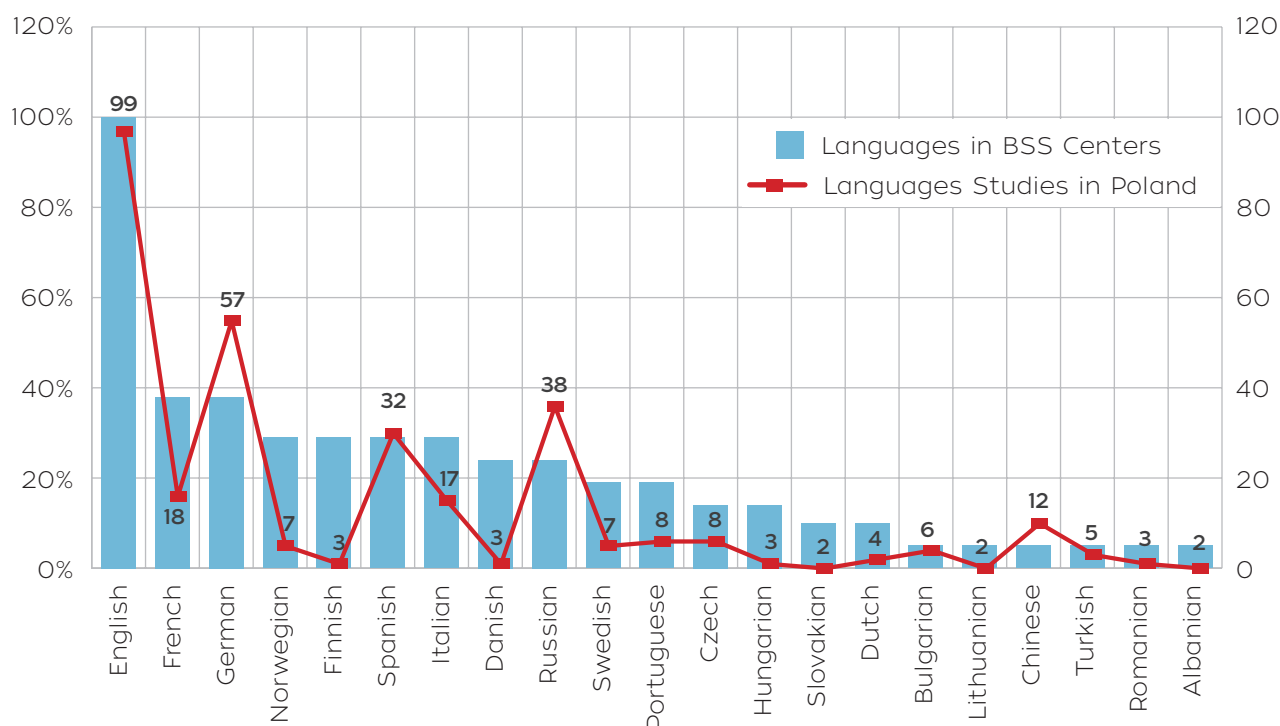


Chart 8. Languages used in Scandinavian BSS Centers vs. language Studies at Polish Universities.

Source: Foreign Languages in Polish Higher Education, Report by Pro Progressio Foundation, September 2015.

The geographical range of services provided by the BSS centers

Within last two decades the BPO and SSC industry has grown the geographical range of provided services. The Scandinavian operation centers are following

this trend and the majority of the BSS Centers are providing services to global clients. At the same time most of the companies support Scandinavian region as well as the Western Europe. Within the group of analyzed companies there were also those which provide services to Polish and CEE markets.

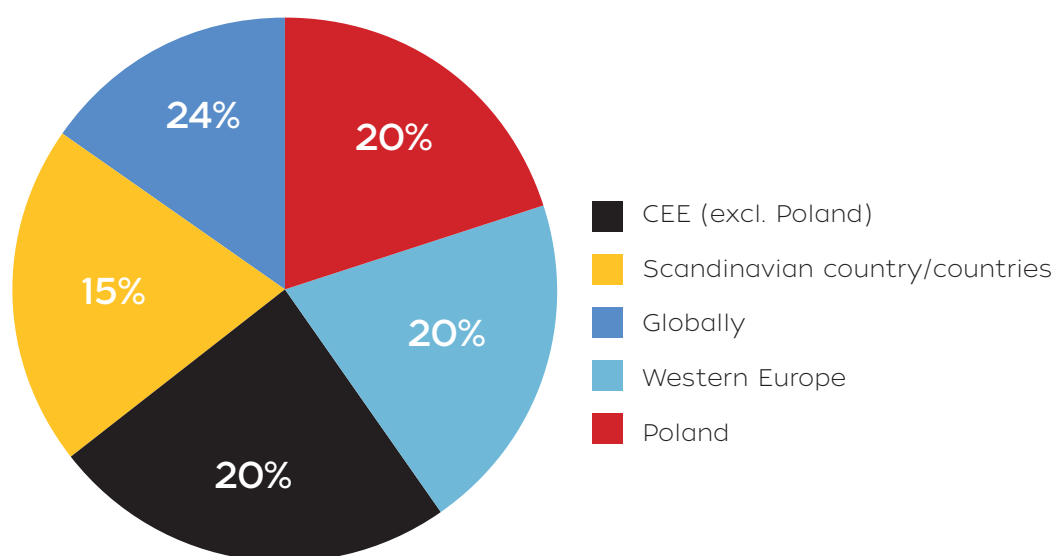


Chart 9. Geographical range of provided services

Industry structure of companies served by the centers (internal and external clients)

The Scandinavian BSS companies provide services to a wide range of industries. The

industry supported the most by BSS centers based in Poland is Technology and Telecommunication. The other popular industries are Industrial Production and B2B Services.

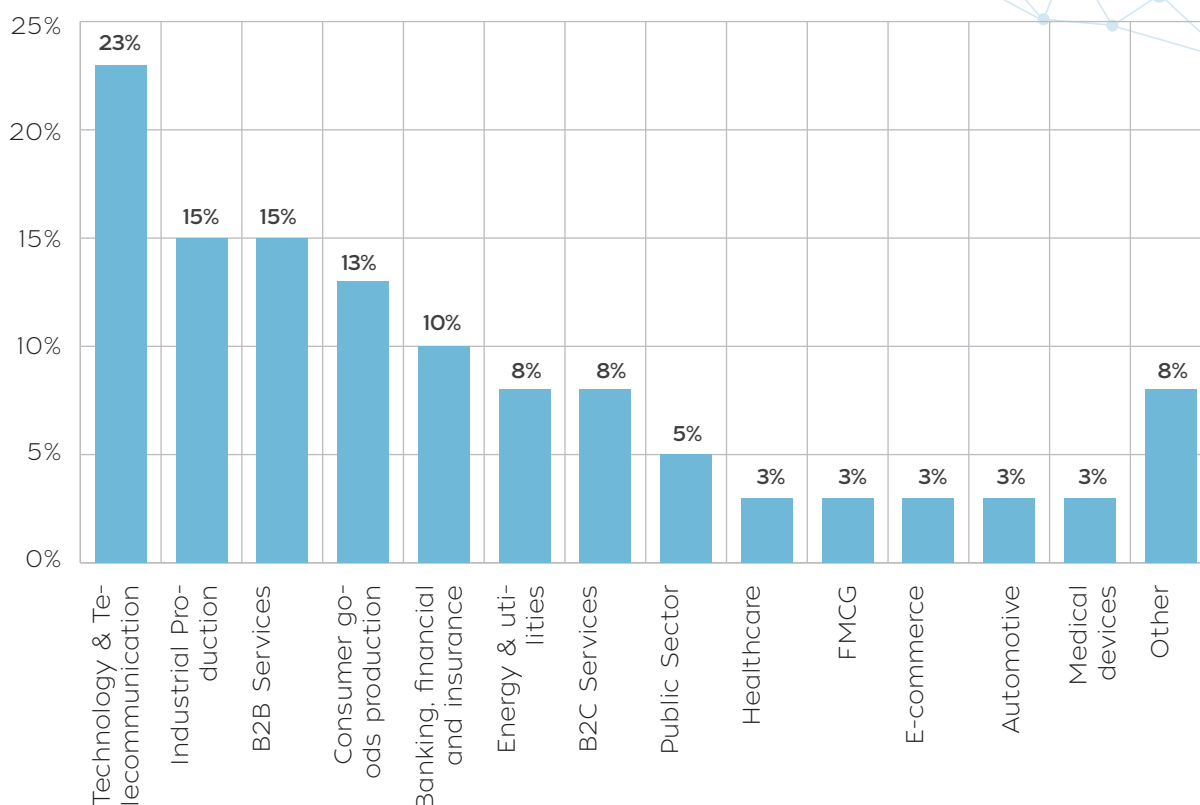


Chart 10. Industry structure of companies served by Scandinavian BSS Centers

Reasons for choosing Poland as the location of the BPO/SSC operations

Poland is chosen for the location of BSS Centers due to a number of reasons among which the most important are availability and quality of HR resources but also very good and optimal geographical location (including closeness to the company's headquarters). Within the answers provided by Scandinavian BPO/SSC already present in Poland there were also other factors, which investors took into account while choosing Poland:

- Relatively low cost of doing business;
- Foreign languages skills, access to university graduates, broad competences in finance and banking;
- Stable political environment;
- Good transport infrastructure;
- Availability of office space;
- Small cultural differences.

"Global services are provided from Poland due to the good competence supply and competitive approach."

"Poland is a great investment location for both domestic market as well as a service delivery country for the other markets."

"Poland was chosen due to a growing economy, which has withstood global economic crisis and significant human potential owing to its 38 million population."

"Access to qualified workforce, good knowledge of English among staff. Good transport infrastructure and the relatively low cost of doing business were also important factors."

3 SCANDINAVIAN COMPANIES FROM THE BSS SECTOR - CASE STUDIES

SZCZECIN

Coloplast Shared Services
 Dansk Supermarked
 DGS
 Nordic Consulting & Development Company
 Macrobond Financial
 BL Stream
 Gamelion Sp. z o.o.
 Tieto Poland Sp. z o.o.
 GaveKal Analytics

BYDGOSZCZ

Eniro Polska
 Unicall

POZNAŃ

Carlsberg Shared Services Centre
 DFDS Polska
 Lina Medical
 Shared Services Center
 Duni EFF
 IKEA Shared Services

TORUŃ

OpusCapita

ŁÓDŹ

Cybercom
 Nordea Operations Center
 Poyry
 Teleca

WROCŁAW

Volvo Polska
 BL Stream
 Nokia Networks
 Tieto Poland Sp. z o.o.
 Opera Software
 Ruukki Finance Services

KATOWICE

Eniro Polska
 Ericsson
 Vattenfall IT Services Poland Sp. z o.o. (VISP) - Katowice
 Barona ICT Services Poland

TRICITY

Arla Global Financial Services Centre Sp. z o.o.
 Hempel
 Transcom
 Kemira Gdańsk
 Metsa Group
 Young Digital Planet
 Nordea Operations Center
 Powel AS
 Schibsted Tech Polska
 Det Norske Veritas

OLSZTYN

Transcom
 Worldwide Poland

ELBLĄG

FLDSmidth

BIAŁYSTOK

Intrum Justitia

WARSAW

Pandora Jewelry Shared Services
 DSV Road Sp. z o.o.
 Ericsson
 IFS
 Oriflame
 Arpi Group
 UniCall Communication Group Poland
 7N
 Tieto Poland Sp. z o.o.
 BL Stream
 Esselte Polska

KIELCE

Medicover

RZESZÓW

UniCall Communication Group Poland

CRACOW

Lundbeck Business Service Center
 Electrolux Global Shared Service Centre
 Nokia Networks
 UPM Kymmene
 Getinge Shared Services
 Amer Sports Financial Shared Service
 Schibsted Tech Polska

Map of Scandinavian investments in the BSS sector in Poland

ARLA GLOBAL FINANCIAL SERVICES CENTRE



In 2008 Arla Foods opened in Gdańsk Global Financial Services Centre responsible for all financial operations of the company. Out of the total number of 62 locations, including Romania, Latvia and Bulgaria, only a few were taken into final account and Gdańsk was selected as the most representative city. This location provides all necessary facilities and the most unique atmosphere - great place, fantastic people and beautiful city. One of the main assets of the region is its favorable geographical situation providing excellent transport opportunities. Private and public universities facilitate access to well-educated graduates as well as specialized and experienced staff.



Gdańsk, pomorskie



SSC



300



Arla Foods is a global dairy company. Arla philosophy of producing natural, healthy and high quality dairy products dates back to the 1880s when dairy farmers in Denmark and Sweden joined forces with one common goal: To produce and provide the best dairy products. Part of the company's historical roots, its DNA, is the constant aim to progress and create something greater and better. In Gdansk Arla located its Global Financial Services Centre.

As a part of Arla Foods the Global Financial Services Centre delivers all financial operations for the company. The centre is handling global processes in the area of accounting, internal banking, human resources, procurement, internal control, payments to our vendors, collection and Masterdata management. Arla Global Financial Services Centre is constantly improving the way of working using continuous improvement methodology as well as developing internal control environment helping to secure and minimize the risks within operations. Stepping up to the next level of quality Arla also developed Masterdata Competency Centre responsible for Masterdata quality. Being perceived as the employer of choice in Tri-City the company attracts both new and returning talent. Almost 300 people is working in 13 different languages and 98% of them have a university degree, 76% women, 24% men, where average age is 30 years. The company provides its employees with jobs, but also with professional development opportunities through the organization of internal and external trainings. In October 2014 the Centre moved to the new and larger office space - Neptun Office Center - 5 floors/4300m2. The company is constantly growing and planning future development in Gdańsk.

DUNI EUROPEAN FINANCIAL FUNCTION (EFF)



Demands on international corporations are constantly increasing - cost efficiency and leaner processes are ever more necessary to compete successfully. Optimizing financial and accounting processes creates opportunities far beyond lower costs. Additional outcomes include better quality, transparency, and speed of processes and routines. This is why EFF was founded. Poznań was carefully chosen as the base for EFF due to its central location. Beyond that, it is a university city that offers a great recruitment base. It also has excellent communications; daily flight connections to hubs such as Co-

EFF was established and is owned by the Swedish stock-listed Duni Group. The Duni Group is made up of four commercial business areas, which include Table Top, Meal Service, Consumer and New Markets. Duni has subsidiaries in about 15 countries around the world. Accounting and finance for most of Duni's entities have been moved to EFF.

penhagen, Munich and Frankfurt and by car or train it is only two hours to Berlin. The EFF started its operations in 2005 and carries accounting for 14 countries as of today. The EFF provides everything from IT competence, to advice and help in general finance, accounting & taxes, to the complete scope of accounting need of its customers.

EFF turned out a success for Duni, surpassing expectations by achieving more than 50% cost reduction and improving quality within the finance and accounting function. Today EFF successfully helps several medium-sized corporations in Europe and elsewhere to reach their targets. The services offered by EFF include: accounts payable, accounts receivable, operational and legal accounting, customer service, procurement, payroll and project management and support. The transition to outsourced accounting and financial services is, with our help, far from as complex or time consuming as one would think. We rely on years of experience and assume leadership for the project when needed. Our clients do not need to start from scratch to build their own structure and competence.



Poznań, wielkopolskie



BPO/SSC



48



ELECTROLUX GLOBAL SHARED SERVICE CENTRE

Electrolux is a global leader in home appliances. It offers thoughtfully designed, innovative solutions for households and businesses, with products such as refrigerators, dishwashers, washing machines, cookers, vacuum cleaners, air conditioners and small domestic appliances. Under esteemed brands including Electrolux, AEG, Zanussi, Frigidaire and Electrolux Grand Cuisine, the Group sells more than 50 million products to customers in more than 150 markets every year.



Shared Service Centre was opened in 2005 in Krakow, Poland, to provide financial and accounting (F&A) services to the European market. Over the past 10 years, information technology, HR and technical documentation services have been added. In F&A area the centralized Shared Service Centre was supporting initially a group of local shares services. By 2008, the Krakow Centre had begun to service North America with similar processes. In 2009, the local offices and the Centre in Krakow were merged into one Shared Services Organization. Today, the Centre employs almost 700 people.

Various recommendations and researches were the main contributors in taking the decision about the location of the Centre. Krakow has great pool of educated employees and was (and still is) the biggest location for Shared Service Centres in the region. Proximity to the Electrolux production sites in the south-western part of Poland played also a critical role.

With 10 years of experience behind it, the Shared Service Organization now looks forward to its next ten years to further consolidate its position as a partner in the organization through process standardisation, automation and extending its service portfolio in finance and accounting into more and more value adding activities. This may have a slight impact on headcount increase.



Kraków, małopolskie



SSC



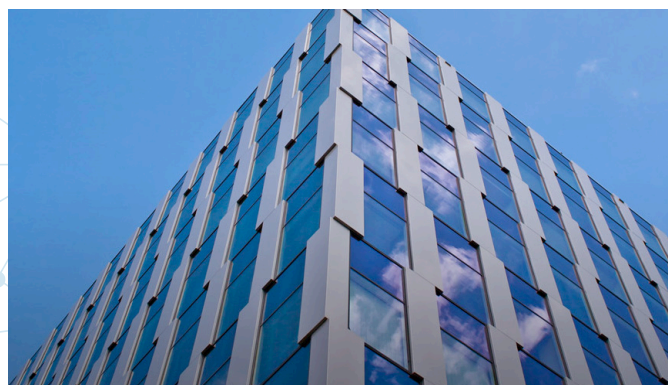
700



NOKIA NETWORKS

At the time of its establishment in 2000, Nokia European Software and Engineering-Centre employed only 10 people. A lot has changed since then. Today, Nokia units in Wrocław and Cracow constitute the biggest ICT research and development centre in Poland. In 2013, it had over 1,800 employees. Nowadays Nokia Networks employs over 3,500 people in Poland and is still growing.

Nokia Networks Technology Center in Wrocław emerged from Siemens Software Development Center, founded in 2000. The R&D Centre in Wrocław is a key department in the entire organization, due to a great number of significant research projects being conducted there. Moreover, it is one of the four biggest Nokia technology centres in the world, and one of our two software development departments. Developers at



Wrocław, dolnośląskie
Kraków, małopolskie



R&D



over 3600



NOKIA



Nokia Networks is a leading telecommunications vendor in Poland with extensive infrastructure and services organizations in Technology Centers in Wrocław, Cracow and in Warsaw, where the company has its Polish headquarter. Telecommunications R&D facilities in Wrocław and Cracow accommodate some of the most modern telecommunications Testlabs in Eastern Europe. In 2015 Nokia celebrated its 150th anniversary.

TC Wrocław cooperate and actively participate in all stages of the software production process, from concept to implementation.

More often than not, the research projects of TC Wrocław involve cooperation with other departments and teams from all over the world. Nokia Networks has appeared on the map of Cracow after the acquisition of part of the mobile infrastructure of Motorola Solutions. Technology Centre in Cracow has a long history as a research and development center for mobile phone base stations. Currently the Centre in Cracow employs around 550 staff and has a lab with about 300 base stations in LTE and CDMA technology. Nokia Networks Technology Center in Kraków is responsible for creating new solutions for 3GPP LTE (Long Term Evolution) and 4G mobile networks products, dedicated for customers all over the world.

Employees working in Wrocław and Cracow have very high qualifications and most of them have higher education degrees. They constantly develop their skills and knowledge by taking part in additional courses or by participating in research projects carried out by Nokia in cooperation with Universities in Wrocław and Cracow. For many years, Nokia has partnered with Polish universities to promote innovation among students and educate them through lectures, lab time, internship programmes, and initiatives such as Innovative Projects.

NORDEA OPERATIONS CENTRE

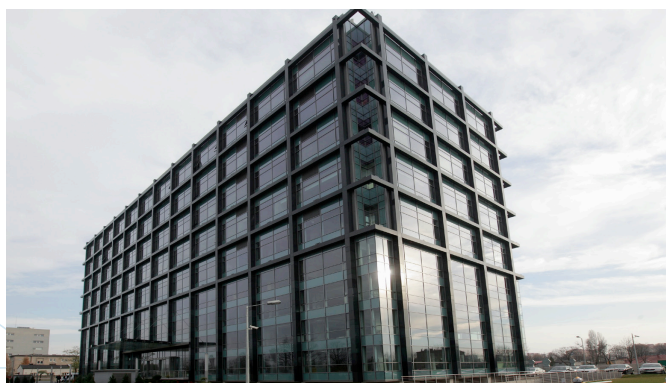
The Nordea Group is a leading financial group in northern Europe and the Baltic Sea Region. It offers services in retail, corporate and institutional banking and property and life insurance. Nordea Operations Centre (NOC) in Poland, provides transnational banking and accounting services as well as IT services for all Nordea Group entities. At present, NOC employs over 1300 employees in Łódź and Gdynia and plans further growth.



Nordea Operations Centre was set up in 2010 as a back office centre to provide services and support for Nordea Group in Sweden, Denmark, Norway and Finland. Success achieved in the first five years has enabled a dynamic growth and resulted in more than 1000 employees being hired in for two locations in Łódź and Gdynia. This year alone already 300 people were hired and recruitment processes for 100 more employees is under way. Nordea Operation Centre will continue to grow dynamically for next few years.

In 2015 Nordea IT Polska unit was merged with NOC, adding close to 300 employees to the total headcount. Now the Polish organisation supports all Nordea Group entities including the IT area. Nordea Operations Centre governance model ensures close cooperation and full integration with Nordea Group Business Areas, supporting efficiency and quality of deliveries.

Poland was chosen by Nordea due to great talent pool available, defined as great availability of educated people with good command of English. Modern telecom and office infrastructure and a sound business case were also an important factor while choosing the investment location.



Łódź, łódzkie
Gdynia, pomorskie



SSC/BPO



more than 1300



POWER



Powel Sp. z o.o. is an IT company focused on the software development for the energy and public sectors. We are a subsidiary of Powel AS, a Norwegian software company with the headquarters in Trondheim, Norway. The office in Poland is located in Gdansk Science and Technology Park and consists of a few rooms loaded with tons of modern equipment.

Currently Powel employs 11 people and cooperates with many subcontractors that deliver different parts of the systems the company produces. In total, the company gives employment to over 40 people in the Pomeranian region. Powel uses .NET, Java and front-end technologies as well



Gdańsk, pomorskie



R&D



11



Powel is a leading supplier of software solutions to the energy, public and contracting sectors. We help utilities work smarter, benefitting businesses and the environment. Our systems and expertise help create real value for companies worldwide. Founded in Norway in 1996, Powel has grown to be an international corporation with staff numbering 400 and offices in 6 European countries and in Chile.

as state-of-art User Experience standards. The company in Poland is an important part of the entire Powel organization supporting activities in the following areas:

- Software for optimizing the energy production,
- Software for trading the energy on stock market,
- Software for waste and sewage management,
- Software for water management,
- Software for maintaining electrical infrastructure,
- Software for road and tunnel construction.

In Poland foreign investors find many very favorable factors to run their business with a great success, those factors are: skilled, motivated and effective labor, good infrastructure, special economic zones offering extra benefits, attractive cost of labor, support from the local authorities, increasing area of office space of A+ and A category.

Powel is always looking for talented engineers and we plan to give employment to over 60 people in Pomerania by the end of 2016.

RUUKKI (PART OF SSAB GROUP) GLOBAL BUSINESS SERVICES

SSAB

Global Business Services (GBS) as the name implies, is an organization which provides business support with an effective infrastructure for administrative processes. The added value is that GBS offer is to contribute to harmonized and effective processes, simplified communication links via a common structure for Service desk, KPIs which are clear and common across the business, and which ensure the optimal flow and transparent SLA's into the business. The centre is located in Wrocław (ul. Wołowska 18) and delivers services for units in Central Eastern Europe in areas of:

- Finance processes: P2P, travel & expenses, O2C with credit control, R2R, tax, Group & statutory reporting, CO master data;

SSAB is a highly specialized, global steel company. The company is a leading producer on the global market for Advanced High Strength Steels (AHSS) and Quenched & Tempered Steels (Q&T), strip, plate and tubular products, as well as construction solutions. SSAB's production plants in Sweden, Finland and the US have an annual steel production capacity of 8.8 million tons. In 2014, SSAB has obtained ownership of all the shares in Rautaruukki Corporation. As a result of the merger, a new division - Ruukki Construction - has been formed. In Poland, Ruukki has two production plants in Oborniki (near Poznań) and Żyrardów. SSAB's organization is divided into the following areas: SSAB Special Steels, SSAB Europe, SSAB Americas, Tibnor and Ruukki Construction.

- Master Data management: Customers & Vendors, Materials - this is a global function covering whole SSAB world.

After the SSAB/Ruukki merger, the focus for the scope of Business Services in Finance and MDM is to be expanded, both in terms of processes and the geographical areas which are included. Here we're going to move towards what is being done today within the former Ruukki and the geographical scope will be progressively increased.

In the Master Data management the harmonization of processes between the divisions and GBS will continue. The Master Data management will be concentrated in GBS in Wrocław, where the former Ruukki has had a specialized team for many years which handles this flow. Certain processes which are outsourced today will be in-sourced.



Wrocław, dolnośląskie



SSC



70



TIETO

Tieto with almost 14 000 employees in 20 countries is one of the largest Nordic IT services companies. Providing full life-cycle IT services for well-known global brands from Asia, Europe, and the USA. Our services range from managed services to consulting and system integration complemented by industry specific products and productized software. Our role is to help customers and society at large transform, with IT as the main driver and enabler we simultaneously help to drive sustainable development.



In Poland operates the Product Development Services organization, that provides world-class solutions and services for Telecom Industry, IoT and Connected Cars. Tieto chose Poland because it was the fastest growing European economy. Vast opportunities for foreign investors and strong business support from the government made Poland a perfect place to invest. Wrocław and Szczecin were chosen for its advantages regarding people, knowledge, location and a well-prepared investment support.

Wrocław and Szczecin are similar towns. Both are hubs of education, culture and business with many advantages crucial for IT business. The climate in both cities encourages entrepreneurship and creativity. The positive environment for business comes with a strong support of local authorities and organizations such as Wrocław Agglomeration Development Agency. The cities are strong academic centers in Poland which attract talented people from other Polish regions. Tieto finds it very important that the local labor market is a mix of a number of IT companies and, therefore, is a solid base of highly-skilled employees. It makes the overall pool of available talents even richer from other regions in Poland and Europe.

In conclusion, Poland is an investment-friendly market. Tieto centers in Wrocław and Szczecin are highly important to the company with highly-skilled teams and plans to grow in the future.



Wrocław, dolnośląskie
Szczecin, zachodniopomorskie



R&D, ITO



455



UNICALL COMMUNICATION GROUP POLAND

UniCall is an outsourcing contact center of Scandinavian roots and work culture, which were successfully adopted on the Central and Eastern European markets. The company was founded in 2004 in Norway and has since grown to more than 900 jobs in 10 centres currently located in the Czech Republic, Poland, Lithuania, Hungary and Slovakia. UniCall provides a wide range of services including telemarketing, sales, lead generation, customer service, technical support, back office and business advisory services for several industries.



UniCall primary activity is professional telephone support and telemarketing on performed on behalf of the partners, although the company frequently uses other contact channels such as e-mail, chat or traditional white mail. UniCall first offices were opened in Scandinavia in 2004 but soon it became apparent that further development was to expand into the Central and Eastern Europe. In 2008 the Czech Republic was selected for the first location in the region but Poland quickly became a natural choice owing to its steadily growing economy and sheer size of the country with its 38-million population that offered a wide choice of employment options and languages skills required for multilingual activities. Equally important was the fact that several large corporations have their offices in the country, which is crucial for business development and attaining new business partnerships. Since 2010 UniCall has grown from one office in Warsaw to current three with a total of over 150 workstations and nearly 200 employees.

Furthermore, Poland will soon become the European head office for UniCall Group as the company is planning to increase its administration staff to supervise Group operations for all markets that the company is present or will operate on. Owing to this decision, UniCall has decided to open a larger office in Warsaw and expand its operations in Rzeszów and Bydgoszcz. It is also possible that UniCall will open a new office in another city in late 2016 or early 2017.



Bydgoszcz, kujawsko-pomorskie
Warszawa, mazowieckie
Rzeszów, podkarpackie



BPO, Call Centre



around 200



VOLVO POLSKA

VOLVO

Volvo Polska has been present in Poland since 1995 and is one of the main foreign investors in the Lower Silesia region. Apart from the industrial operations, Volvo as one of the first companies noticed also the possibilities for development in the innovative business services sector. At present within Volvo Polska in Wrocław there are three global service centres which provide services in the area of IT, finance and HR.

Volvo IT Services is one of the first IT competence centres in Poland, providing comprehensive IT service for the whole Volvo Group e.g. Volvo Trucks, Volvo Buses, Construction Equipment, including enhance-

Volvo Polska is part of the Volvo Group, one of the world's leading suppliers of transport solutions for commercial use. The company in Poland consists of: the Volvo bus factory producing innovative hybrid and electric hybrid buses, of the commercial organizations for Volvo trucks, buses and construction equipment as well as of the global centres providing services in such areas as IT, finance and HR. Volvo employs over 3 thousand people in Poland.

ment, development and maintenance of over 1.5 thousand of systems in various technologies. Volvo IT Services has become an organization of highly competent and recognizable brand, providing broad scope of services. The Accounting Services in Wrocław is one of the Volvo Group global centers delivering services in the area of finance and accounting, supporting Volvo companies from Europe, the Americas, Asia and North Africa. HR Services global delivery centre in Wrocław is responsible for providing the Volvo Group with services related to the Human Resources administration processes.

Volvo decided to choose Poland and Wrocław in particular as a location of the investment thanks to the good climate for investment in the city of Wrocław and a long industrial tradition of the region. Wrocław is also a very important University centre with Technical schools, such as e.g. the Wrocław University of Technology, which secures access to a large number of highly qualified graduates and possibilities of co-operation with academic centres.



Wrocław, dolnośląskie



BPO/SSC/R&D



over 1000



4 CHOOSING THE LOCATION FOR THE BPO/SSC OPERATIONS – BUSINESS GARDEN CONCEPT BY VASTINT

VASTINT

Companies which provide outsourcing services or create business service centers, represent a crucial, and what is even more important, a very dynamically growing group of office tenants in Poland. As a consequence, developers must implement solutions that meet the specific needs of the industry.

It is well known that the most important factors for outsourcing companies are:



Business Garden Warszawa



Business Garden Wrocław

access to a well-developed communication infrastructure, effectiveness and efficiency of office spaces and ensuring the safety of operations. Furthermore, based on our own observations, we can see that the quality of the work environment also plays a considerable role in choosing a work environment.

The innovative concept of Business Garden parks is the response to the market conditions. They represent our “Scandinavian” approach to creating workplaces. By engaging experience, resources and implementing modern solutions, we have created an attractive and user-friendly office complexes.

We have built business parks on the outskirts or in the districts that are close to the city centers. They are conveniently communicated with both the city center and the airport. The proximity to the airport is convenient for our business customers. The vicinity of bus stops and bicycle lanes as well as modern road system around the buildings provides an easy access to the office for employees who commute by public transport. This corresponds with expectations of the tenants, for which an the financial issue is the additional advantage of the location outside the central business area.

In order to adapt the product to BPO/SSC requirements we are increasing the functionality of the buildings and providing flexibility of the individual floors’ plan. According to our experience, the best parameters in terms of workplaces’ thickening ratio, have an “open space” offices. In a recently opened complex in Poznań, all structural elements have been located in



Business Garden Poznań

the line of facades. As the result, the office space was devoid of the pillars. Open and structural elements-free space with a modular installations system allows all possible arrangements, depending on individual customer's vision. In Business Garden Wrocław, the entire buildings were designed in a way that allows any combination of the rental units into the one larger space, at the same time maintaining the requirements for evacuation and social-sanitary facilities. Tenants, in case of business development or increasing the number of employers, have endless opportunities for expansion within the same building or complex.

The primary aim and the added value of our investments is using solutions which guarantee, that with time the buildings will not require unforeseen maintenances and more efficient energy expenditure will result in lower operating costs. In the Business Garden Poznań complex, thanks to the high quality and the efficiency of the energy materials that have been used to build facades and good technical solutions, including air conditioning system, the buildings are using about 46% less energy than typical office buildings. Besides, using fittings with a low ratio of water flow allows us to save about 6.8 million liters of water per year.

Many of the eco-friendly building solutions have a direct impact on the quality and comfort of the working environment. Employees

have access to efficient air conditioning system but also to fresh air - thanks to the hinged windows. For the sunny days intelligent system of external blinds protects the offices from overheating.

In our opinion, the design of the workplaces has a substantial impact on the users' life quality. It is important to ensure the proper balance between the work and the leisure. Therefore, the garden itself is a mandatory element in our projects. It provides a pleasing touch, but above all it is a place where we can create a relaxing zone with a close contact with the nature which includes, among others a basketball court, table tennis, or chess. An interesting idea that was implemented in the Business Garden Poznań was to build furnished glass pavilions in the garden, which will be a perfect place for formal as well as informal meetings, standing in opposition to "anonymity". In Wrocław, the restaurant located in a pavilion will perform a similar role.

It is worth mentioning that due to the often 24-hour work cycle, BPO/SCC tenants draw attention to the presence of amenities for employees. Because of the business parks scale, the range of services is constantly modified and enriched to meet the expectations of tenants. It's very important to give them the benefits of dealing with everyday matters on the site, during a break or after leaving the office.

5 ERGONOMICS AND ATTRACTIVENESS – KINNARPS FOR DSV



When planning relocation, DSV International Shared Services decided on comprehensive design and furnishing of their new office. Modern and ergonomic interiors were to harmonise with the new attractive location of the company and strengthen its brand, too.

The DSV Group is a global provider of transport and logistics services. The reason for the company's relocation to the new office at Domaniewska in Warsaw was the dynamic development and growth of the International Shared Services business. Thomas Jansson, President of DSV ISS, wanted the new office to guarantee both comfortable working conditions for its employees and also flexible adjustment to the future growth of the company.

Employee's comfort as a priority

Thomas Jansson decided to actively participate in the project from the very beginning. "At our company, employees are

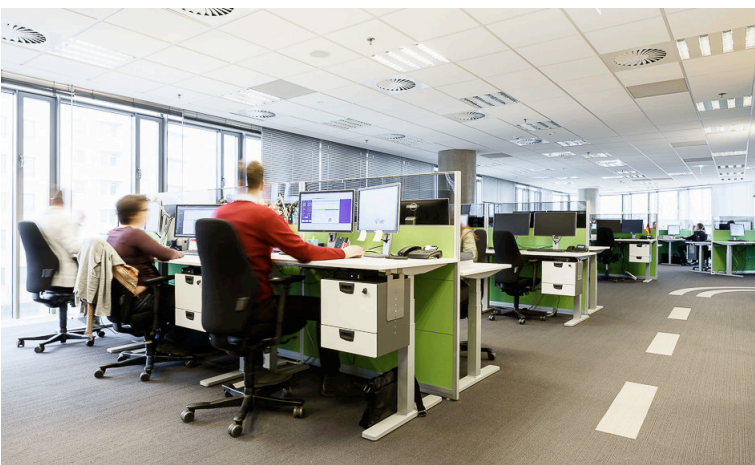
our priority. For this reason I have been personally engaged both in the relocation and arrangement of the new office so that it can become a comfortable and attractive place for our current and future employees", says Thomas Jansson. He was inspired by the Danish central office of the company, where ergonomics and attractiveness of the working space for employees were put first. The provider of a part of the solutions used there was the Swedish branch of Kinnarps.

Knowing the possibilities and trends in modern office design, Thomas Jansson carefully defined the scope and selected the contractor to implement the project for the Polish company. It was the offer of Kinnarps Polska that was selected due to the broad experience of the company and its comprehensive approach: from consultancy to delivery and installation of the furnishings. The planned project was more complex than at the company's head office since it covered a wider scope of products and included coordination of subcontractors' deliveries.

Full cooperation

All the new solutions were discussed and presented in Kinnarps showroom. DSV employees tested the solutions to check whether the workstations meet their expectations, including ergonomic swivel chairs and sit-stand desks with electric height adjustment.

Meeting rooms are another element that increased the attractiveness of the new office. The themes and patterns were chosen by employees in a special competition. The arrangement and furnishing was made





by Kinnarps. The company's experts also suggested the use of office screens, which ensure optimal acoustics in an open space, and helped to choose colour patterns.

Mutual success

"DSV employees appreciated the design and furnishing of the new offices. In particular, they liked the freedom of choice as regards the manner of work: in a seated or standing position at desks with an electric lift", emphasises Thomas Jansson. Kinnarps experts conducted training in work ergonomics and discussed the possibilities of adjusting workstations to individual needs. The modern office and ergonomic workstations have become an important argument in recruitment of new employees.

"After implementation of the first project, I had no doubts that we wanted the next

two to be implemented by Kinnarps as well", says Thomas Jansson. New offices will be necessary: DSV ISS already employs nearly 500 people and has plans for further growth.



Furnishings used in the project

Kinnarps products:

- Series[P] sit-stand desk (with an electric lift)
- Plus[6] chairs
- Rezon office screens
- Series[E] one storage units
- 5000CV conference and visitor chairs with castors
- Series[T] conference and meeting tables
- Fellow foldable training tables
- Frisbee stools

Non-standard complementary furniture

- Reception
- Johanson Design's U-sit sofas
- Built-in kitchenette and storage unit in the management office
- Newmor wall coverings (in conference rooms and kitchens)

Scandinavian-Polish CHAMBER OF COMMERCE

Scandinavian-Polish Chamber of Commerce is one of the biggest bilateral chambers in Poland. Currently, it has more than 380 members. SPCC is an association established by and for business people having links to Scandinavia or interest in this region. The main office is located in Warsaw and the Chamber is active in Poznań, Tricity, Kraków, Szczecin and Wrocław. SPCC offers its members a wide range of activities, such as networking business mixers, seminars, thematic branch committees, conferences and breakfast meetings with renowned personalities from the world of politics and economy. Membership in SPCC offers not only networking opportunities with an elite group of high-performing managers of Nordic companies, but is also a way of finding inspiration for everyone who would like to expand their own business. In 2014, SPCC celebrated its 10th anniversary.

www.spcc.pl



PROPROGRESSIO

Pro Progressio – organization located in Poland representing outsourcing and modern business services industry. Works as One Stop Shop for companies interested to open operation centres in Poland, especially in the area of F&A, ITO, Call Contact Centre, R&D and others. Pro Progressio supports Polish cities in the promotion of the investment attractiveness, educates about outsourcing and promotes outsourcing companies thanks to the management of the only outsourcing media in Poland: www.outsourcingportal.pl and Outsourcing&More Magazine (www.outsourcingandmore.pl). Pro Progressio is co-operating closely with Invest in Poland Agency, Deutscher Outsourcing Verband, Scandinavian-Polish Chamber of Commerce, Foreign Trade Administration of Ministry of Economy in Israel, Chambre de Commerce et d'Industrie Polonaise en France, Real Estate Advisors, HR companies and many other organizations located in Poland and other European Countries.

www.proprogressio.pl

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