

Polska



BSS in Poland

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Poland has 47 business services centers with a headcount of at least 1,000 per center.

The largest share of jobs in the sector (35%) is generated by shared services centers (SSC), followed by IT centers (30%), outsourcing centers (21%) and R&D centers (14%). In the case of employment structure by organizational model, we also do not identify a single type of entity as being dominant. The largest number of jobs (40%) was created by commercial service providers/ outsourcing centers. Entities operating on behalf of parent companies/shared services centers generated a 37% share in employment structure, while hybrid model companies had a 23% share.

There are, however, significant differences between foreign and Polish companies when it comes to the structure of employment according to the organizational model. It is worth pointing out the much higher share of employment at foreign entities operating for the benefit of parent companies (43%) than is the case for Polish entities (6%). In general, the structure of employment at foreign centers is much more even, whereas Polish companies are dominated by commercial service providers/outsourcing centers (90% share).

Poland has 47 business services centers with a headcount of at least 1,000 per center. This means that there are now 10 more entities of this size than in 2016. Combined, they employ 86,000 people (which represents 35% of the jobs in the sector). Almost all of the largest centers are owned by foreign entities (44 out of 47). The average headcount at business services centers in Poland is 226 (the median is 90 people). The highest average headcount is found at shared services centers (318 people), with the lowest at IT centers (161 people). On average, BPO centers have 281 employees, while R&D centers have 201 employees. The latter figure is largely due to the high headcounts at entities such as: Nokia, Intel, GE, Samsung and Motorola, which, combined, account for 1/3 of the jobs at R&D service centers in Poland. When we look at average headcounts at Polish and foreign centers, we note that they are much higher in the latter (264). The noticeable lower average headcounts at Polish centers (139) are due to, among other things, the large number of small IT companies in the pool of entities in question.

The top six investors in the business services sector in Poland are: IBM, Capgemini, Credit Suisse, Atos, Nokia, and Citibank. Each of these companies has over 4,000 employees at their business services centers in Poland. It is worth noting that other major investors include Polish companies such as Comarch, Asseco and the OEX Group.

Full report is available to download below.



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