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Business Process Offshoring in Poland

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Abstract

The offshoring is nowadays one of main competitive strategies used by companies from different industries. Therefore rising markets are becoming more and more attractive locations for enterprises from the BPO/SSC sector. The purpose of this article is to review the basic definitions of offshoring, and to present an analysis of this fast-growing area in Poland - the BPO / SSC sector. In the paper the following points were discussed among others: the number of companies and employees in this sector. The main location factors for foreign industries in this sector in Poland were presented and analyzed. These factors affect bringing in new investments and keeping the existing companies. In the long term they influence the development of the city, region and country.

Keywords: offshoring; outsourcing; business process offshoring; competitive; city;

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1. Introduction

In recent years, the growing importance of globalization of services in the world economy is noticeable. The processes of globalization affect the growth of interdependence and integration of the countries, societies, economies and cultures (Kempny, 1998). The free movement of products, services, knowledge, ideas and capital across national borders increases. The market systems are affected by the process of de-industrialization of the economy. It causes a reduction in the importance of manufacturing industry and the growing importance of services in GDP and creating new jobs (Kopczynski, 2010). The technological progress is yet another important direction of influencing the changing of the business environment. Now information or data can be send very quickly even to some remote places on the planet (Ocampo, 2002). This allows the companies to use the differences in production costs without any loss of specialization (Sethupathy, 2013).

2. The concept of outsourcing and offshoring

Companies that are aware of the value brought by expertise, access to the state-of-the-art technology and know-how, are willing to acquire them as a commodity. Maintaining of a high level of expertise and quality in every area of company's functioning is associated with incurring of high costs. Increasing competition between the enterprises in the global market leads to the search for new solutions, including new solutions in the management. Therefore, companies that desire to minimize their costs are willing to outsource auxiliary functions to their foreign branches or other companies that will accomplish these functions more efficiently and effectively. Very often production characterized by large amount of human labor or services related to business processes are transmitted to a different part of the world. This management strategy is associated with the concept of offshoring.

This strategy raises a lot of controversy. On the one hand, it can affect the growth of the company's profitability and can create new jobs in the countries where the offshoring companies are located. Frequently the factor influencing the choice of the new place for business is the lower manufacturing costs. Increasingly tough competition in the world markets leads to a change in the location of production processes, through which companies can increase their productivity and efficiency and strengthen their competitive position. On the other hand, it can have adverse macroeconomic consequences for the countries of origin, i.e. importers of offshored inputs. In the countries such as the countries of Western Europe or the US, it causes concerns regarding the maintenance of existing production and employment in the country (Gospodarki, 2007).

The literature distinguishes two concepts: offshore outsourcing and offshoring. The first involves the transfer of business location to another country, while the auxiliary functions are outsourced to specialized suppliers. (Hatonen, 2009) The second concept involves the transfer of business functions to foreign branches within the same company. This managerial practice was started in the late 1970s. In addition to minimizing the costs the enterprises, by using this strategy, can count on finding talent and technology resources, as well as new opportunities for expansion. (Roza, Van den Bosch, & Volberda, 2011) The use of this management strategy in the enterprise can improve the efficiency of organization. Thus, the savings resulting from the use of offshoring can be invested in research and innovation. In the long period of time this can lead to long-term increase in productivity of the company (Kijek, 2013; 2015).

The strategy of offshore outsourcing is one of the foundations of various scientific disciplines, including in strategic management, human resources management, logistics and information systems. (Cheung and Rossiter, 2008) There are at least two concepts of company management when it comes to offshoring. The first concept is related to the possibility of recording company's operations in

attractive tax jurisdictions or tax havens*. In this way, they can significantly save money on taxes, protect assets, reduce risk, reduce costs, protect privacy and avoid bureaucracy. B. Spitz in his book says that the term offshore was originally connected specifically with the activities of American and British companies in tax havens.

Another discussed approach to offshoring is the transfer of business activity due to the possibility of reducing the cost and gaining the quality competitive advantages that contracting services in another country can give. This is an important approach from the global economy perspective. It relates to more competitive prices and the quality of resources, resulting in lower operating costs and access to knowledge and experience, which the company wouldn't have otherwise (Budzynska, 2014; Prochniak, 2012).

3. Determinants of locations of business service centers

Despite the high interest in and the growing importance of the phenomenon of offshoring, there are still unclarified aspects for making location decisions. The location is a very important factor influencing the direct foreign investment. Key features of the location, and thus the location factors attract foreign investors. Jensen and Pederson group the most important locational factors into labor costs, availability of resources, cultural proximity and business environment and local networks (table 1).

Table 1. The Most Important Location Factors

Localization factor	Description
Labor costs	It is one of the most important factors. The aim of the company is to reduce costs and consequently take advantage of the offer of countries where wages are lower. (Stringfellow, Teagarden, & Nie, 2008) However, there may also be some additional costs that affect the volatility of costs, which often results in preventing the achievement of expected results. (Bhalla, Sodhi, & Son, 2008) At the same time the subject literature also mentions, that the consequences of outsourcing go far beyond the direct cost reduction (Contractor, Kumar, Kundu, & Pedersen, 2010; Ellram, Tate, & Billington, 2008; Mudambi & Venzin, 2010)
Resources availability	The choice of the country where the offshoring activity is to be located is influenced by the availability of human and technological resources (P. D. Ø. Jensen & Pedersen, 2010; Lewin & Peeters, 2006; Luzzini & Ronchi, 2010) For example Doh (2005) stresses that the quantity and quality of human resources is also important, while Roza et al. (2011) think that the availability of other service providers and access to talented individuals are equally important (Bunyaratavej, Hahn, & Doh, 2008)
Cultural proximity	It refers to the geographical proximity (Stringfellow et al., 2008), language and cultural factors. (Bunyaratavej, Hahn, & Doh, 2007; Clampit, Kedia, Fabian, & Gaffney, 2015; Doh, 2005; Youngdahl, Ramaswamy, & Dash, 2010) In countries with similar culture, companies will be able to minimize the additional costs, such as costs of additional training. Cultural closeness also affects consumer perception of where the service is performed and whether it is completed close to home country (Tate, 2014)
Business environment and local networks	The company may decide to order the performance of its services to the country, which offers access to local markets (P. D. O. Jensen, 2009; Kedia & Mukherjee, 2009; Roza et al., 2011) or investment incentives. (Bunyaratavej et al., 2008) There is a high risk of theft of intellectual property, which affects the decision on the location of the company. Some countries do not have dealt with legislation on intellectual property theft, which affects their negative perception by potential foreign investors (Tate, 2014)

Source: Budzynska, Katarzyna (2016), Offshoring sector in Poland, *Oeconomica Copernicana*, 7(3).

*According to the OECD, classic tax havens are currently located in Malaysia, Costa Rica, the Philippines and Uruguay. Tax haven is a jurisdiction that deliberately shapes its law contrary to the standards applicable in the Member States. OECD lists several factors that determine whether a jurisdiction is a tax haven: it does not impose any or imposes very low taxes; it is characterized by great discretion of activities; there is a lack of transparency of rules; there are no legal requirements of running a business in a tax haven

4. Polish cities as a location for offshoring services

Poland is one of the most attractive offshoring locations in Europe. Low labor costs, access to modern office space and skilled labor force affect the growth of investment attractiveness of Poland. A major competitor for Poland is India and the Philippines. According to the Tholons report 100 Outsourcing Destinations of 2016 in the top ten cities six are in India (Bangalore, Mumbai, Delhi, Chennai, Hyderabad and Pune), two cities from the Philippines (Manila and Cebu City), one Polish (Cracow) and one Irish (Dublin). India and the Philippines are characterized by low labor costs and the widespread knowledge of English. However, cultural differences and the large geographical distance begin to be an obstacle for many customers of offshoring. This gives opportunities for the development of this industry in the countries of Central and Eastern Europe.

According to reports Tholons Top 100 Outsourcing Destinations (2016) and A.T. Kearney Global Services Location (2016) growing importance of Poland as a location for offshoring services can be observed. According to the Report Tholons 2016. (Table 2). Cracow is located on the 9th place consistently since 2014. In 2016 Warsaw advanced to the 25th place from 38th in 2012. Wroclaw also appeared on 58th place in 2016.

Table 2. Polish cities in Tholons Top 100 Outsourcing Destinations Rankings in 2012-2016

	2012	2013	2014	2015	2016
Cracow	11	10	9	9	9
Warsaw	38	36	32	30	25
Wroclaw	78	75	65	62	58

Source: Own elaboration based on the data presented by Tholons 2012-2016

Attracting foreign investors to the Polish cities is influenced by low wages, good geographical location, cultural proximity to Western European countries, political stability, high potential of the labor market. The growing number of companies with foreign capital in this sector in Poland is noticeable. Figure 1 shows the number of enterprises in Poland. Based on this figure it may be noted that there were 87 enterprises in this sector in 2004, while in the fourth quarter of 2015 there were already 532 and this number continues to grow. More than 84% of all service centers in Poland are located in seven major urban areas, which include: Cracow, Warsaw, Wroclaw, Tri-City, Lodz, Katowice and Poznan agglomeration. These are the main academic centers in the country.

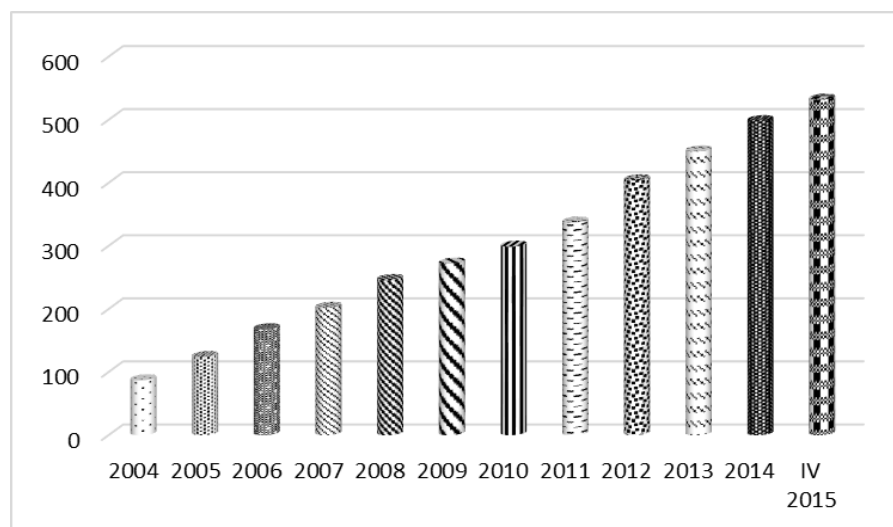


Figure 1. Number of business service centres in Poland (2004-IV 2015)

The largest services offshoring center in Poland is Cracow, which is a leader among Polish cities in terms of both the number of enterprises with foreign capital in the sector (101) and the number of employees (35.7 thousand people). Cracow is followed by Warsaw (93), Wroclaw (67), Tri-City (56), Lodz (49), Katowice (45) and Poznan (40). An increase in employment is connected to the rapidly growing offshoring industry in Poland. A total of 89% are employed in the seven largest cities. From 2013 to the fourth quarter of 2015 employment rose by 40,000 people, and an increase in employment by 20 thousand people compared to 2015 is predicted for the fourth quarter of 2016.

The advantage of Polish cities is good communication with foreign countries, i.e. through many airports (table 3). A large number of connections can affect the growth of the attractiveness of the city. While choosing the city investors take into account the travel time and costs associated with it. Travel time is important if the head office is located outside Poland. It correlates with the time members of the board and regular employees spend traveling.

Table 3. Statistical Data on Selected Polish cities in 2014.

City	companies BPO/SSC	Total number of students in thousands person	the number of graduates in thousands person				the number of colleagues	the average monthly gross salary (EUR)	the number of directions of flights
			total	economic	information	Linguistic			
Cracow	101	165,9	46,5	9,3	1,6	1,6	21	966	65
Warsaw	93	247,5	63,9	18	1,9	2,3	78	1253	100
Wroclaw	67	122,1	31,6	7,5	1,3	1,3	25	1009	32
Tri-City	56	92,2	23,8	6,1	0,9	0,8	20	1094	59
Lodz	49	80,7	21,3	5,6	0,9	1,2	23	893	6
Silesian Metropolis	45	54,8	18,5	5,4	0,4	1,3	14	1210	39
Poznan	40	117	32,5	7,5	0,9	1,6	25	1013	25

Source: Own elaboration based on the data presented by Association of Business Service Leaders in Poland (2014, 2015), GUS (2014).

Cities in Poland are rapidly developing outsourcing centers in Central and Eastern Europe. Unstable political and economic situation of Ukraine affects the growth of competitiveness of Poland and moving investments from Ukraine to Poland. The most competitive city in terms of labor costs of the surveyed centers is Lodz. It creates good basis for attracting new investments, due to the access to trained personnel joined with low labor costs. The highest average monthly gross salary is in Warsaw. Perhaps it is affected by the fact that most of the foreign companies have their headquarters there. For this reason, the largest number of managers, CEOs and board members are in this city.

A characteristic feature of Polish cities is the location of universities, which affects the qualification of the workforce. There are many new fields of study addressed to the modern services industry. There is also a close collaboration between companies in this sector with the universities. The most common form of such cooperation is the preparation of joint training courses, educational projects or conferences. Frequently companies are working with universities in recruiting future employees (ABSL, 2014, 2015).

Table 4. Availability of Foreign Language Studies in Selected Cities on the Polish Universities in 2015

City	The number of universities offering foreign philology teach	The number of philology / foreign languages at universities
Cracow	4	30
Warsaw	8	41
Wroclaw	5	23
Tri-City	3	18
Lodz	5	15
Silesian Metropolis	4	14
Poznan	5	37

Source: Own elaboration based on the data presented by Proprogressio(2015)

In the seven biggest outsourcing centers in Poland studied more than 880,000 people. In 2014, more than 238,000 graduates entered the labor market. Many of them gained qualifications allowing them to work in business services centers. Approximately 77,000 graduated in economics (59,400 people), IT (7,900 people) and linguistic (10,100 people). Warsaw takes the top place for the number of graduates in these fields: economics – 18,000 people, IT – 1,900 people and linguistic – 2,300 people. Cracow takes the second place in terms of graduates in economics and IT. Based on the above data it can be concluded that in these cities there is an easy access to expertly skilled workforce.

Knowledge of foreign languages allows for employment in the companies of outsourcing sector - BPO / SSC. The data in Table 4 shows availability of foreign language studies in selected cities on the Polish universities. The most commonly used foreign language in the BPO / SSC sector is English. Subsequently, German, French, Spanish, Italian, Dutch and Russian speaking employees are looked for. A growing interest of employees who speak the Scandinavian languages in the BPO / SSC is noticeable. These languages are available for study on universities in Wielkopolska Province (Poznan), Pomerania Province (Tri-City), Małopolska Province (Cracow) and Mazovia Province (Warsaw). More and more, the skills of university graduates are corresponding to the needs of foreign companies. In Warsaw (Warsaw University - 41 languages taught), Cracow (Jagiellonian University - 30 languages) and Poznan (Adam Mickiewicz University - 37 languages) are offered most numerous language studies among Polish universities. The biggest number of universities offering foreign language studies are located in Warsaw (eight schools), Lodz, Poznan and Wroclaw (five schools in every of these cities) (Proprogressio, 2015).

The total supply of office space in Poland amounts to over 7.5 million m², of which 97% is attributable to the researched cities. Warsaw (4.5 million m²) has the greatest access to the office space among the countries of Central and Eastern Europe. Very busy movement of investors in renting of office space is noticeable. The highest level of new office spaces put to use was recorded in Warsaw (278,000 m²). Among the other cities the highest growth of office space could be observed in Wroclaw

up 78,000 m2 compared to 2014. The largest office market in the northern part of the country is Tri-City - in 2015 it was more than 463,000 m2 of available office space.

Table 5. Data on Access to Office Space and the Average Rent in Selected Polish Cities in 2015.

City	Modern office space	Vacancy rate (%)	The average rent (EUR)
Cracow	672	4	13,5-15,5
Warsaw	4660	12,3	12,5-23
Wroclaw	596,2	8,8	12,5-16,5
Tri-City	463,8	14,1	13-15
Lodz	261,8	8,1	11,5-13,5
Silesian Metropolis	298	15,4	12-14
Poznan	341,4	16,9	12,5-15,5

Source: Own elaboration based on the data presented by Colliers International (2016)

The lowest rate of unused office spaces - 4.1% was recorded in Cracow and remained on a low and stable level throughout 2015. In Wroclaw, a high volume of transactions and high activity of tenants, affected the decline in the rate of unused office spaces to 8.8% from 11.1% in 2014. A similar situation took place in Lodz, where the vacant office spaces summed up to 8.1% in 2015. Fierce competition among developers affects the ability to negotiate better financial terms for tenants. The highest rental rate for office space must be paid in Warsaw and it amounts to 12.5 - 23 EURO per m2 monthly. The lowest available rental rates for office space are in Lodz - between 11,5-13,5 EURO per m2 monthly. The high rate of unused office spaces in Poznan increased in 2015 due to the commissioning of new office spaces. It had an impact on the reduction in rental rates. At present, they are in the range of 12,5-15,5 EURO m 2 per month (Colliers International, 2016).

5. Conclusion

Polish cities stand out in terms of access to multilingual and qualified staff compared to the other cities in Central and Eastern Europe. Also, relatively low labor costs positively affect the investment attractiveness of Polish cities. The development of offshoring in Polish cities caused an increase in employment and the development of new specializations. Central location in Europe and proximity to major European markets has a high impact on the competitiveness of Polish cities. Political and economic stability positively affects the perception of Poland as a potential location for new investments. Very easy movement between the countries in the same time zone and the access to a large number of low-cost airlines, which support all major European cities, is an advantage of Polish cities.

Polish cities have a very high potential to attract foreign investors to the offshoring industry. Cities compete with each other in attracting businesses and workforce. Cities with better technological, social, infrastructural or institutional conditions win in this competition. (Kasztelan, 2010, 2013) The use of innovative potential and intellectual and social capital of the workforce have a very high impact on the competitive advantage of the cities (Kasztelan, 2014).

To increase the number of foreign investments in Poland existing barriers of economic activity should be removed. The importance of the cost attractiveness diminishes and the importance of other factors grows - skilled workforce, a well-developed technological infrastructure and transport and the

level of labor productivity. Therefore, investment in improving the technological infrastructure and transport, and raising the level of human capital is one of the priorities of the Polish economic policy.

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