THE ASPIRE LEADERS' GALA

WHO WE ARE AND WHAT WE DO

The ASPIRE Process Tracker 2024

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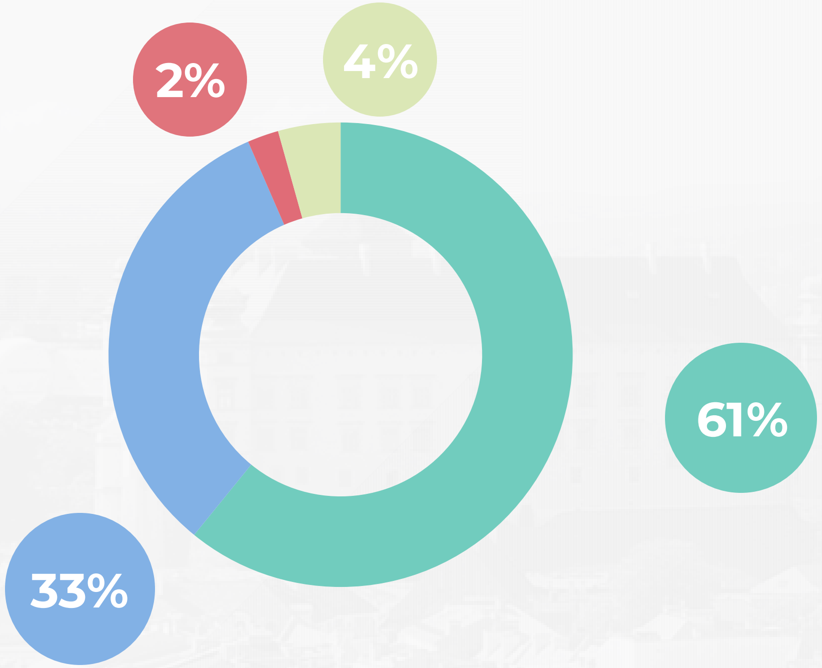
Bridging Industries: Insights and Innovations from 46 Organisations

From a range of industries covering IT, Retail, Banking, Chemicals and more

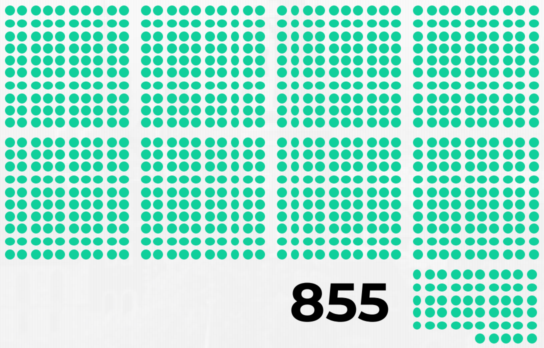
Types of centres



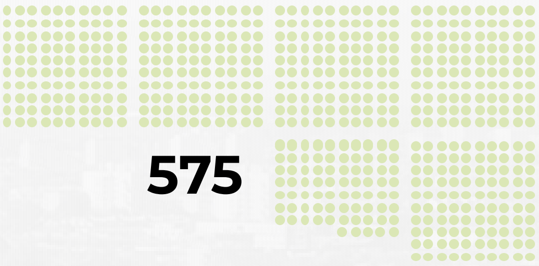
- Multi-Functional Centers
- Single Tower: IT Design & Development
- Single Tower: Other Delivery Lines
- Single Tower: Finance

Average centre size according to the type

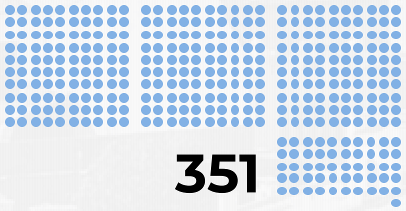
Multi-functional centres



Single tower: Finance



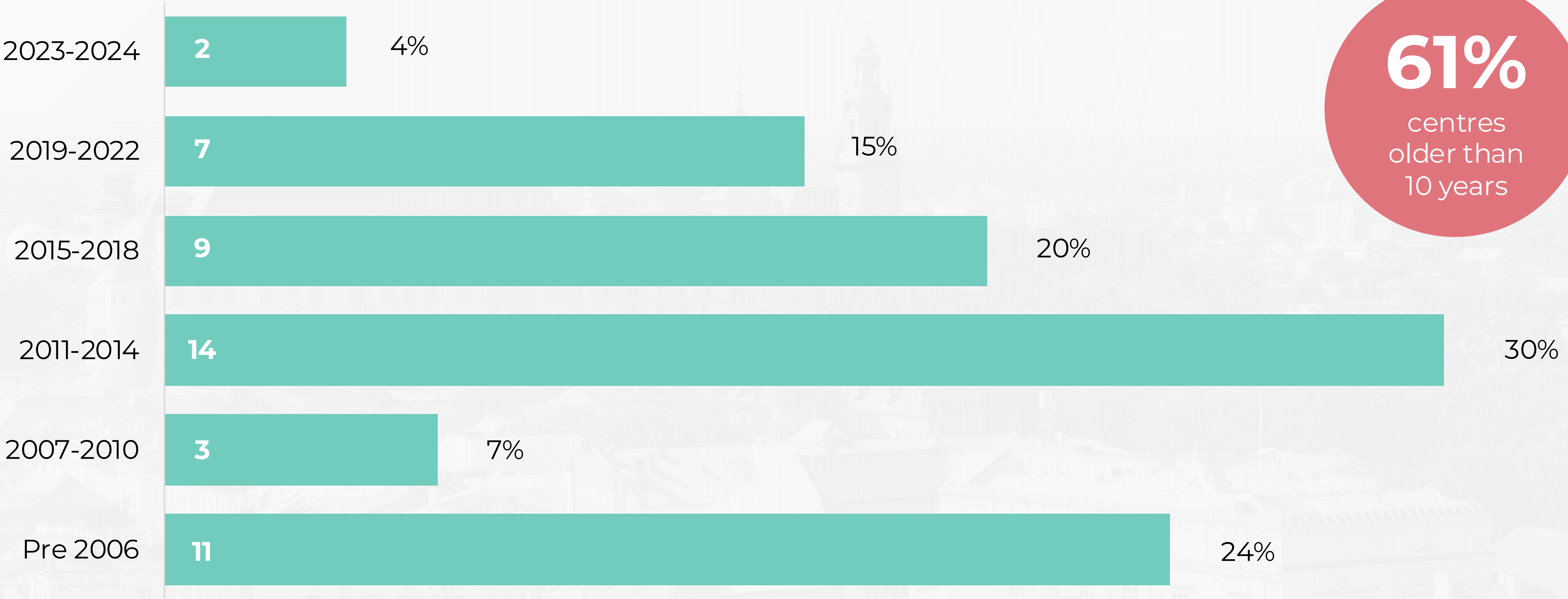
Single tower: IT design & Development



Single tower: Other delivery lines

A balanced mix of fresh and mature centres participated in the survey

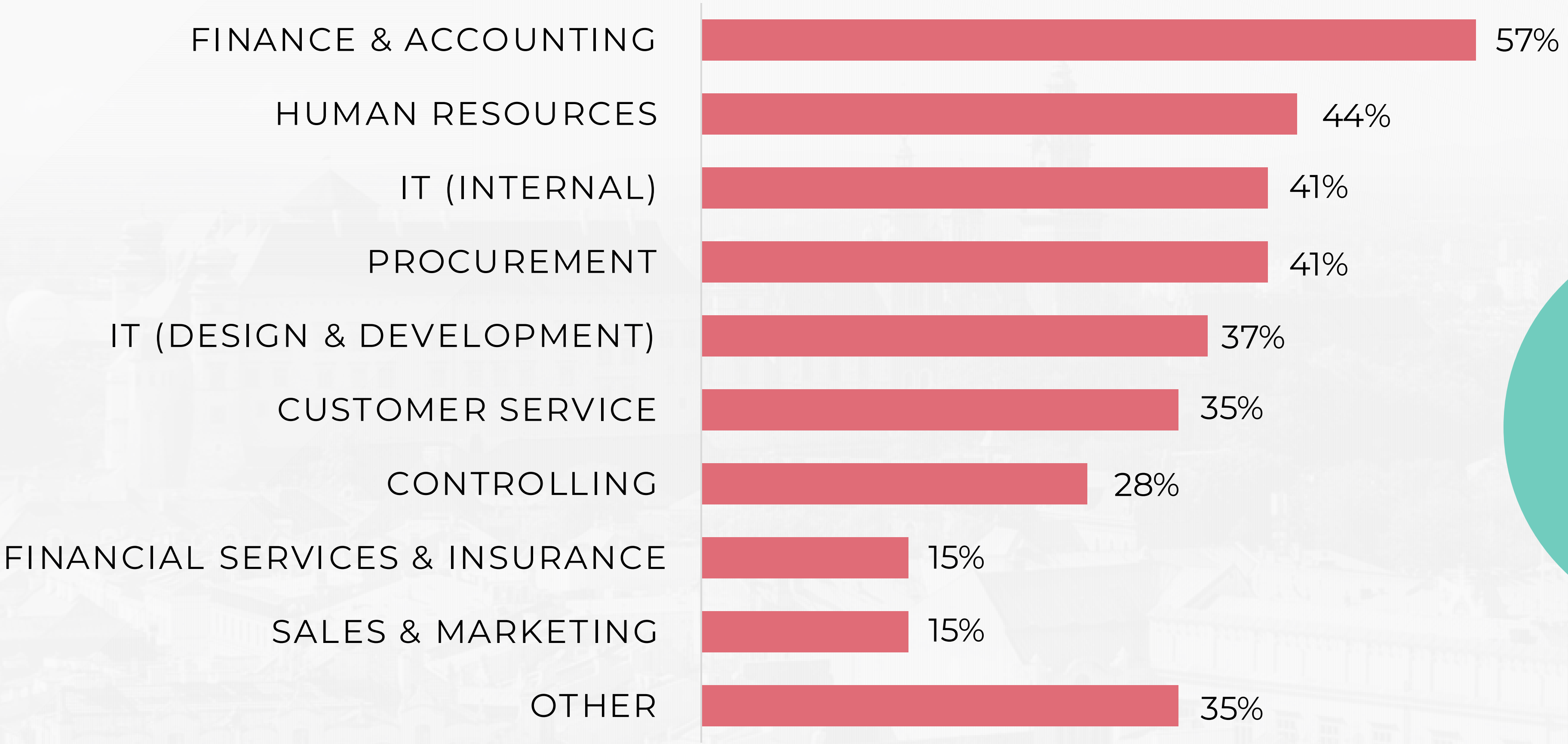
When was your centre established?



61%
centres older than 10 years

Finance & Accounting, Human Resources and internal IT remain the most popular

Service Delivery Lines: % of centres delivering a given service line

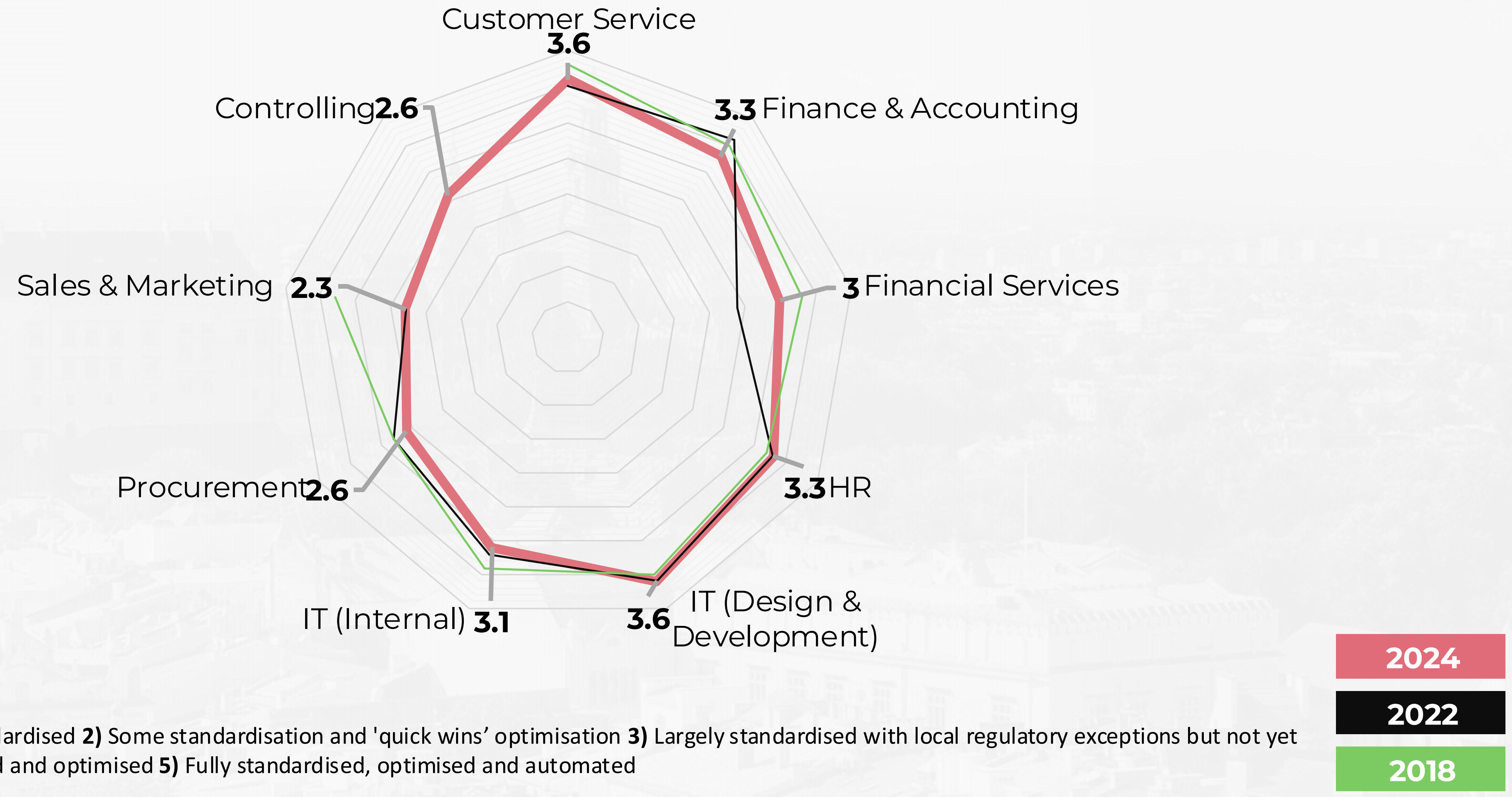


40%

of centres have more than **5 Service Delivery Lines**

IT Development, Finance & Accounting and HR are the most mature functions

Maturity of Service Delivery Lines

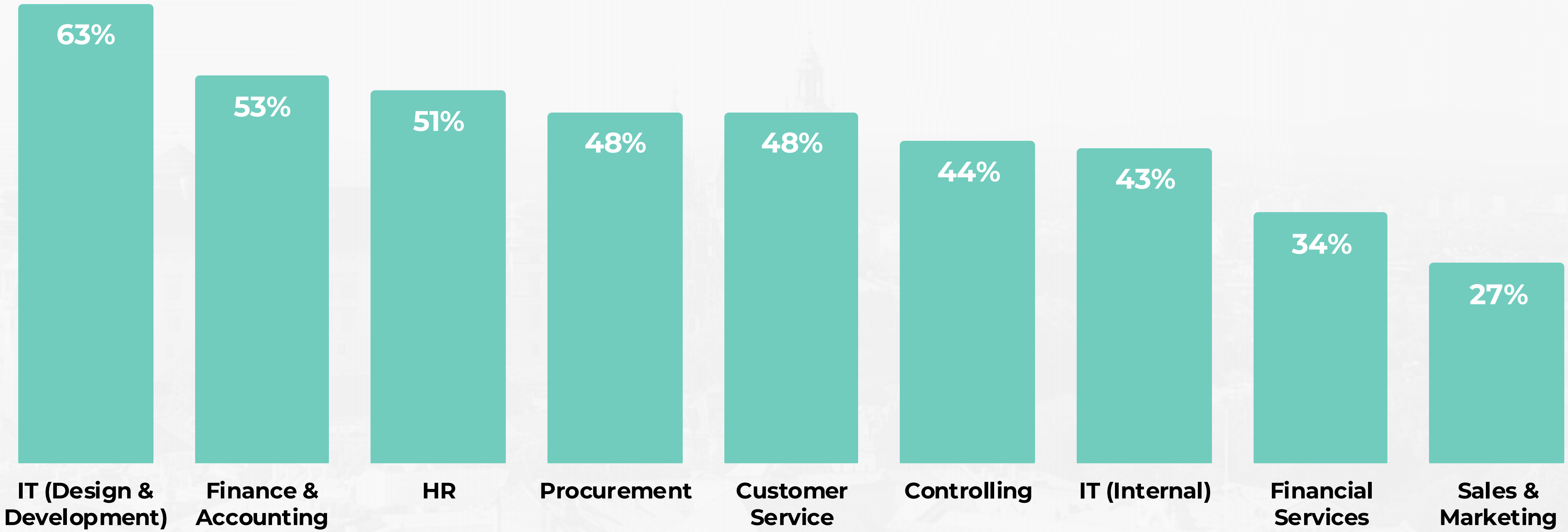


Maturity Index

Where: **1)** Not matured nor standardised **2)** Some standardisation and 'quick wins' optimisation **3)** Largely standardised with local regulatory exceptions but not yet optimised **4)** Largely standardised and optimised **5)** Fully standardised, optimised and automated

IT Development, Finance and HR are centralised to the largest extent

Service Delivery Lines – what is the level of concentration?

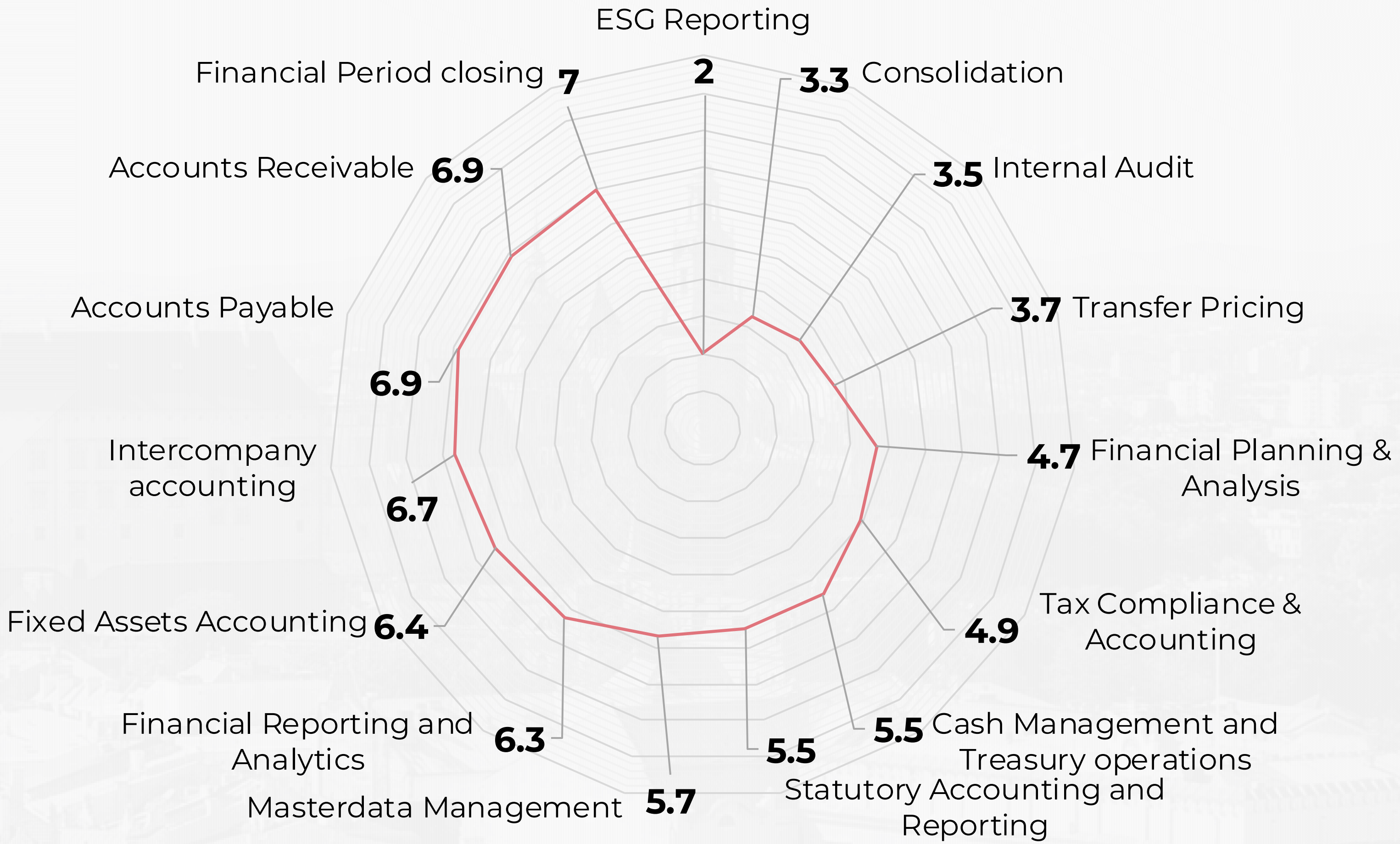


Concentration Index

Where: **0%)** - Service not provided **10%-20%)** - Service provided to a very limited extent or only oversight of a 3rd party provider for the service, **30%-50%)** - Transition and consolidation of some processes, **50%-90%)** - Considerable to full migration of all processes, **100%)** - Full ownership of the function (including management of any 3rd party outsourced functions and development of new processes and services)

GL, AP and AR still show the highest level of centralisation

Service Delivery Lines – Level of concentration in Finance & Accounting

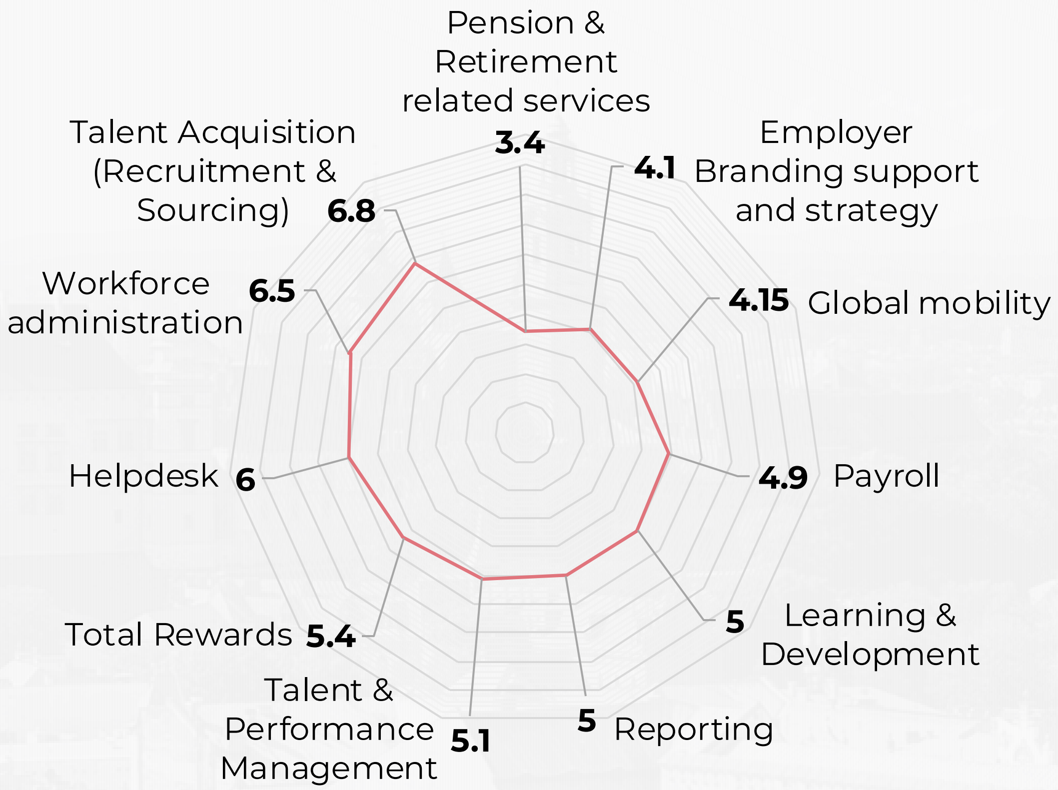


Concentration Index

Where: **0)** - Service not provided **1-2)** - Service provided to a very limited extent or only oversight of a 3rd party provider for the service, **3-5)** - Transition and consolidation of some processes, **5-9)** - Considerable to full migration of all processes, **10)** - Full ownership of the function (including management of any 3rd party outsourced functions and development of new processes and services)

Talent Acquisition, Workforce Administration and HR Helpdesk are the most common HR processes served by Krakow centers

Service Delivery Lines – Level of concentration in Human Resources



Concentration Index

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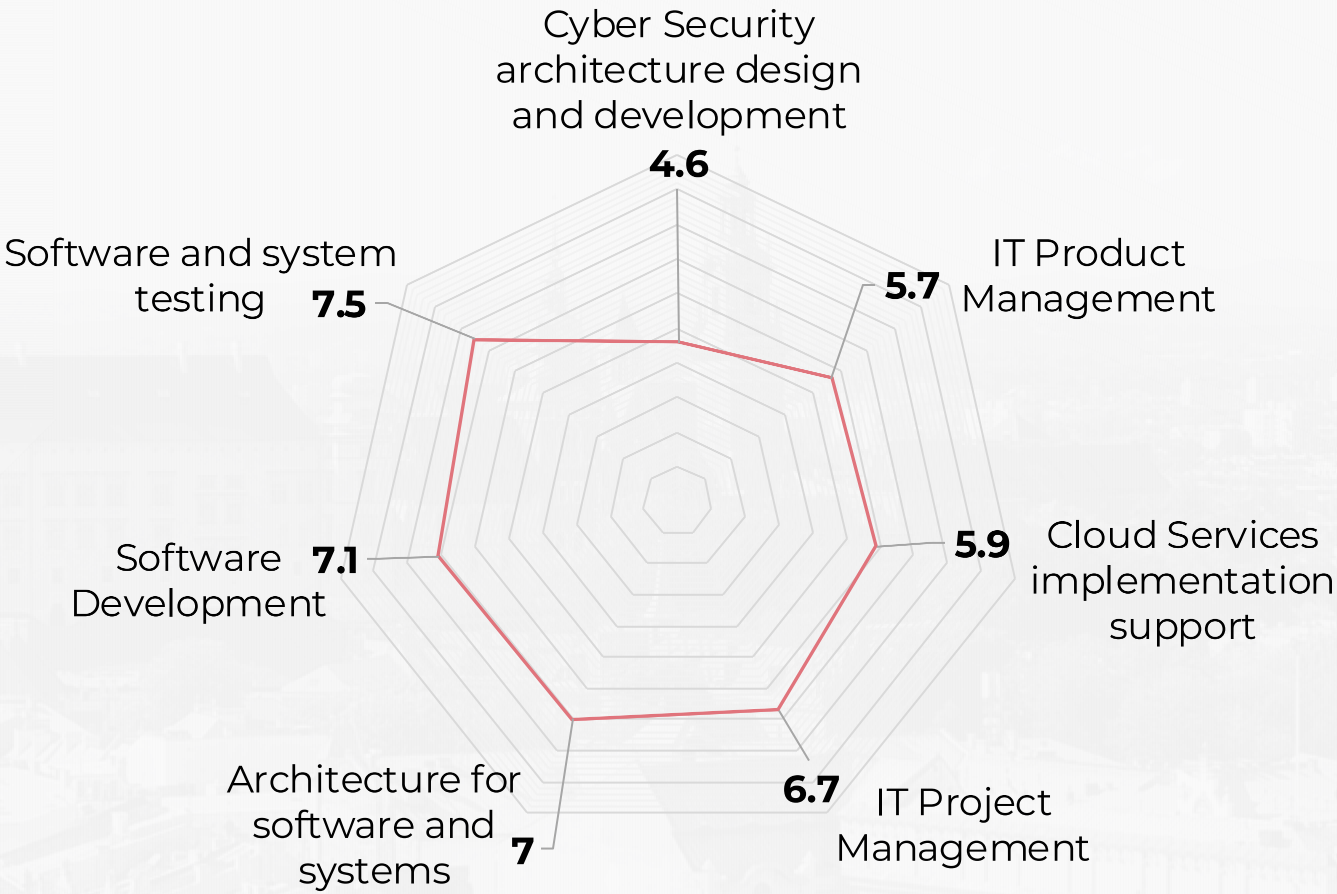
Krakow remains strong in Testing, Software Development and Architecture

Service Delivery Lines - Level of concentration in IT (Design & Development)



Concentration Index

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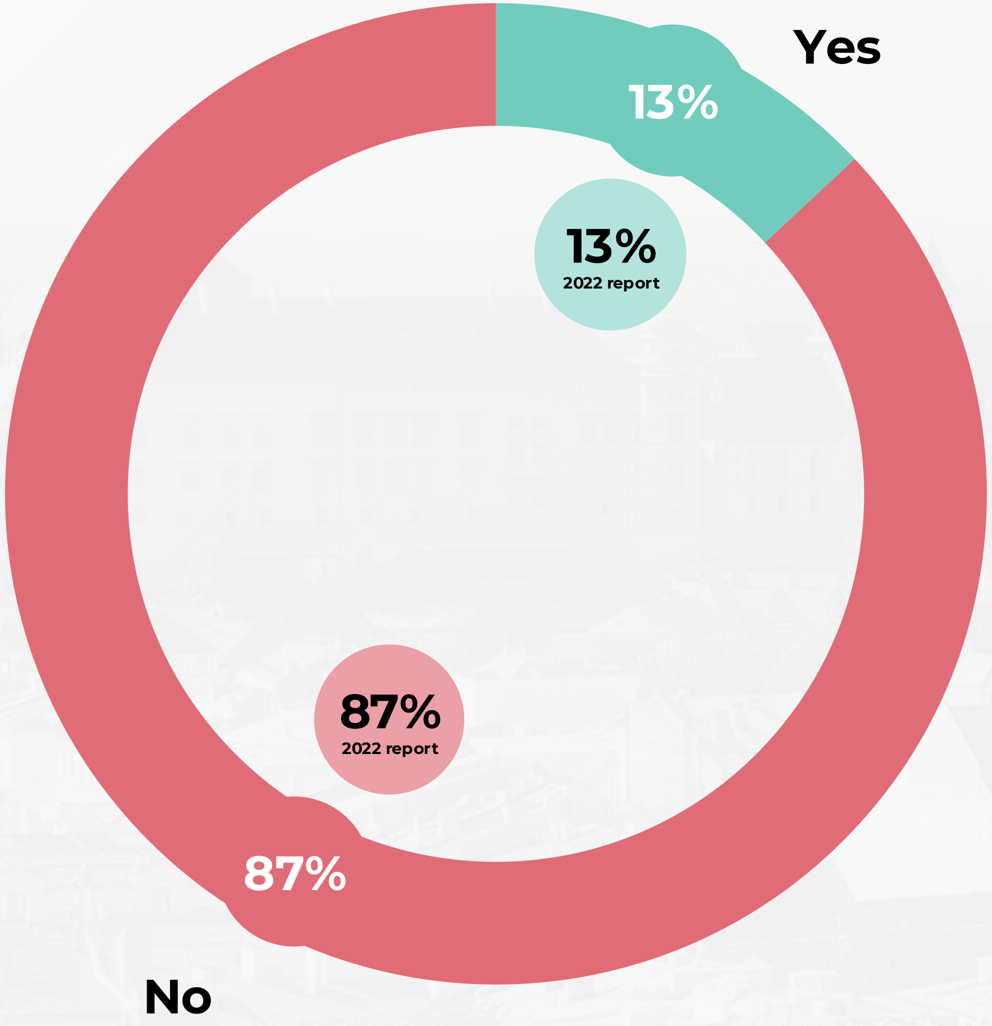
Transactional processes like AP and Financial Services back-office are the most likely to be outsourced

In the last 12 months has your centre supported transition of your existing processes to an external provider?

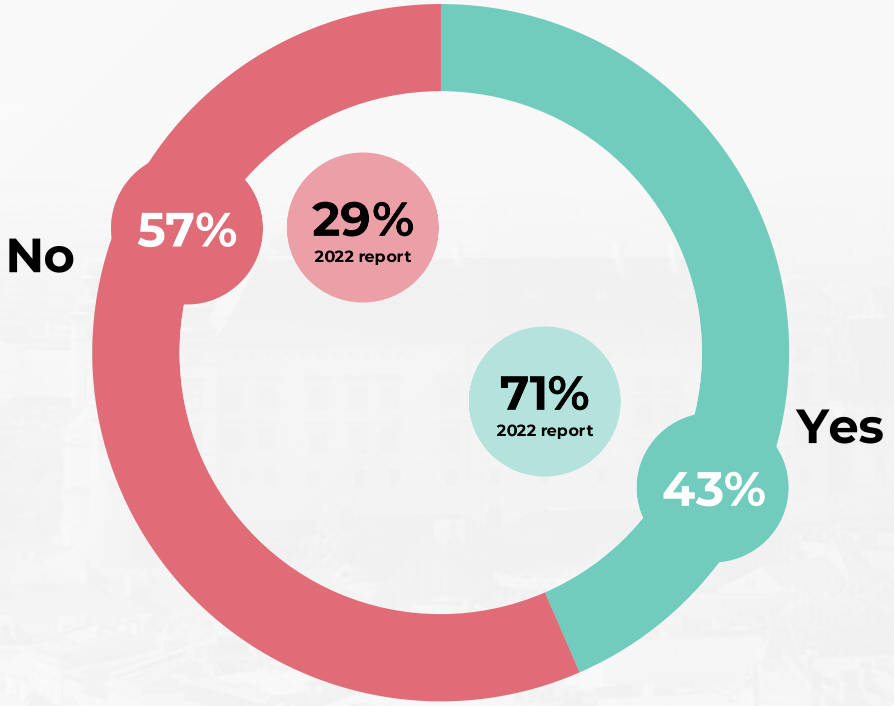


External

- *Accounts Payable*
- *Transaction Processing for bank operations*
- *Consumer Finance*
- *Insurance Services*

Growth is slower than in previous years but 54% of centres still expanded their scope

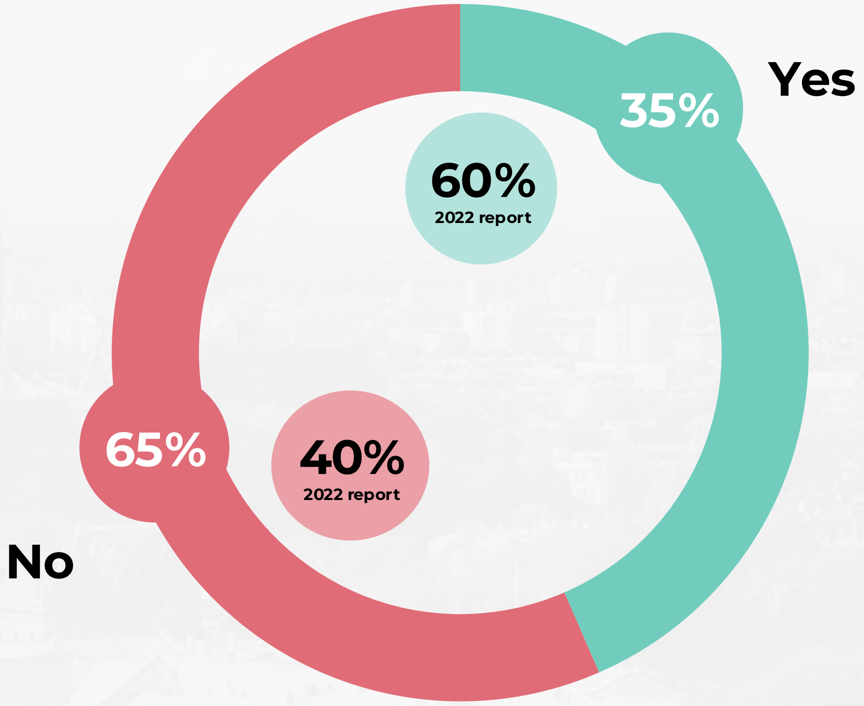
In the last 12 months has your centre taken over **any new transactional processes?**



Examples of New Transactional Processes:

- Logistics
- Benefits
- Consumer Finance Management
- Finance: AP, AR, GL
- Customer Service

In the last 12 months has your centre taken over any **new knowledge-based processes?**



Examples of New Knowledge-based Processes:

- Financial Planning
- Statutory
- Indirect Tax
- HR Advisory
- Data Analytics

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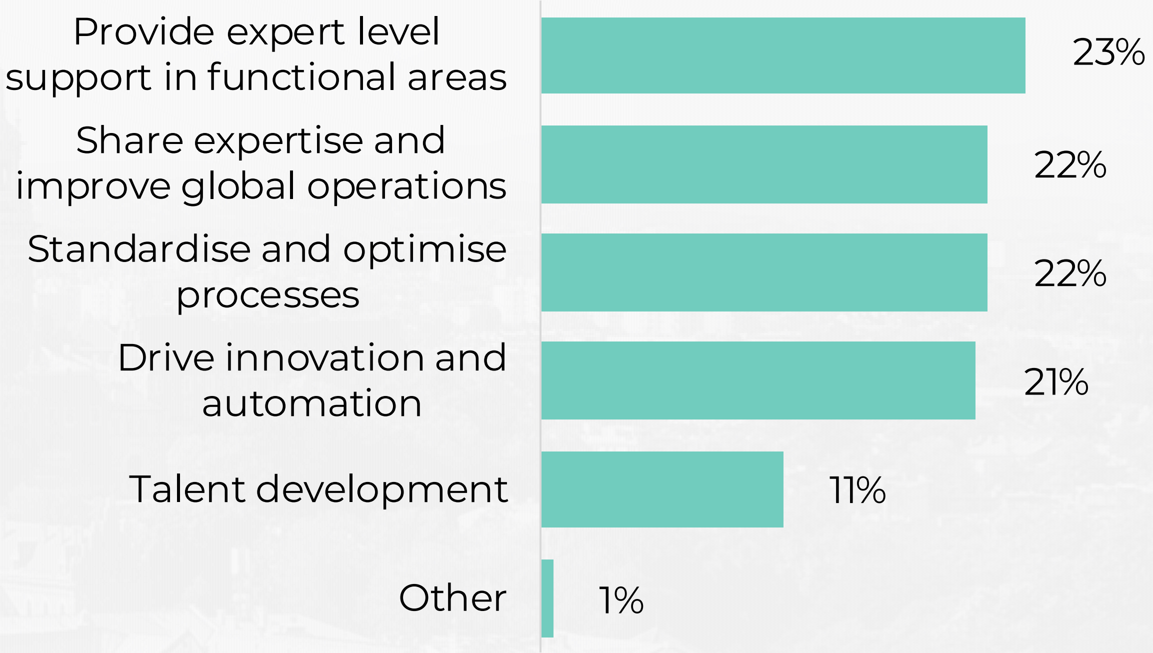
There is no consistent definition of the key role of Centres of Excellence

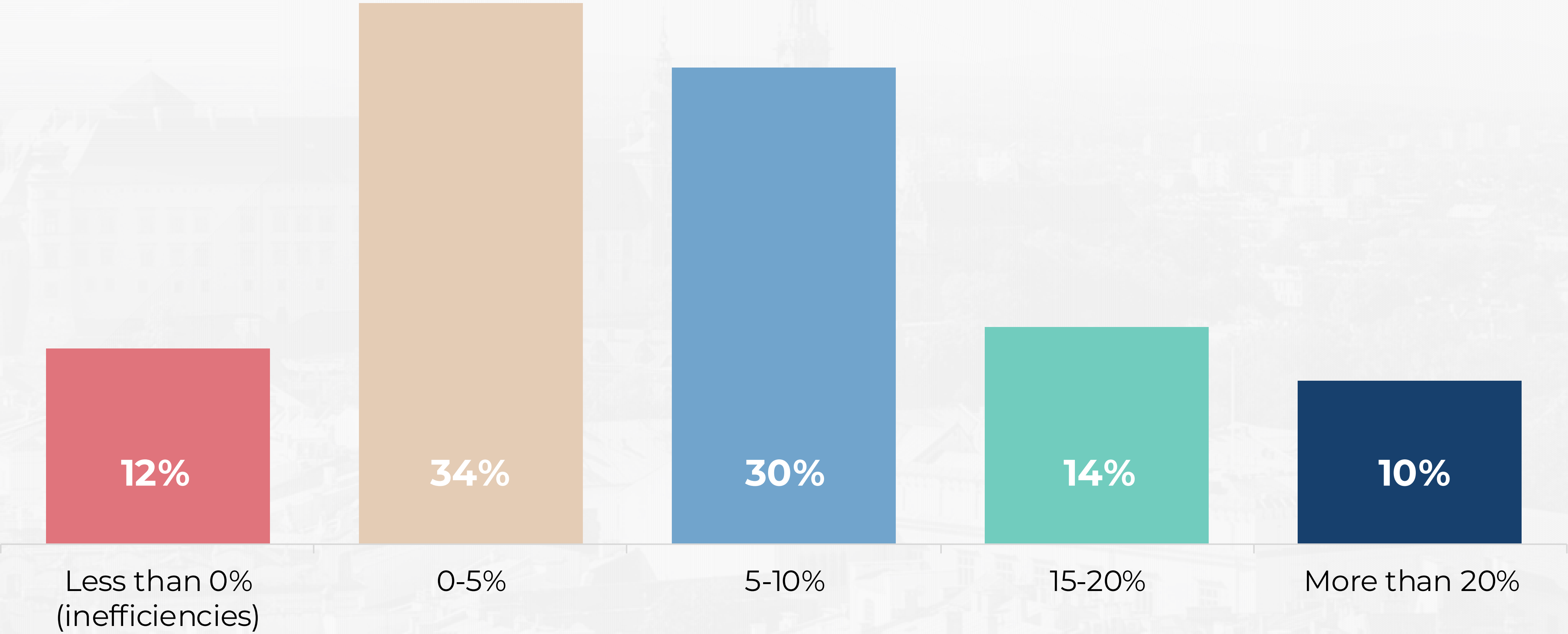
Does your organisation **have a Centre of Excellence?**

What is the **primary role** of your Centre of Excellence?



The average last year efficiency rate is approximately 8%

What is the efficiency rate? % of capacity release in last financial year



Global Process Owners (GPOs) are most popular in Finance, Customer Service and IT

Has the Process Ownership Been Transferred to Your Centre?

51%

GPOs located or planned to be located in the centre

The speed of transformation is decreasing

In the last 12 months has your centre implemented any significant Transformation Programmes?

Technology

Enabling Technologies:

- **ERP & related:** SAP 4Hanna, AICO for RTR, Fiori, Blackline, Anaplan
- **Cloud:** Google Cloud

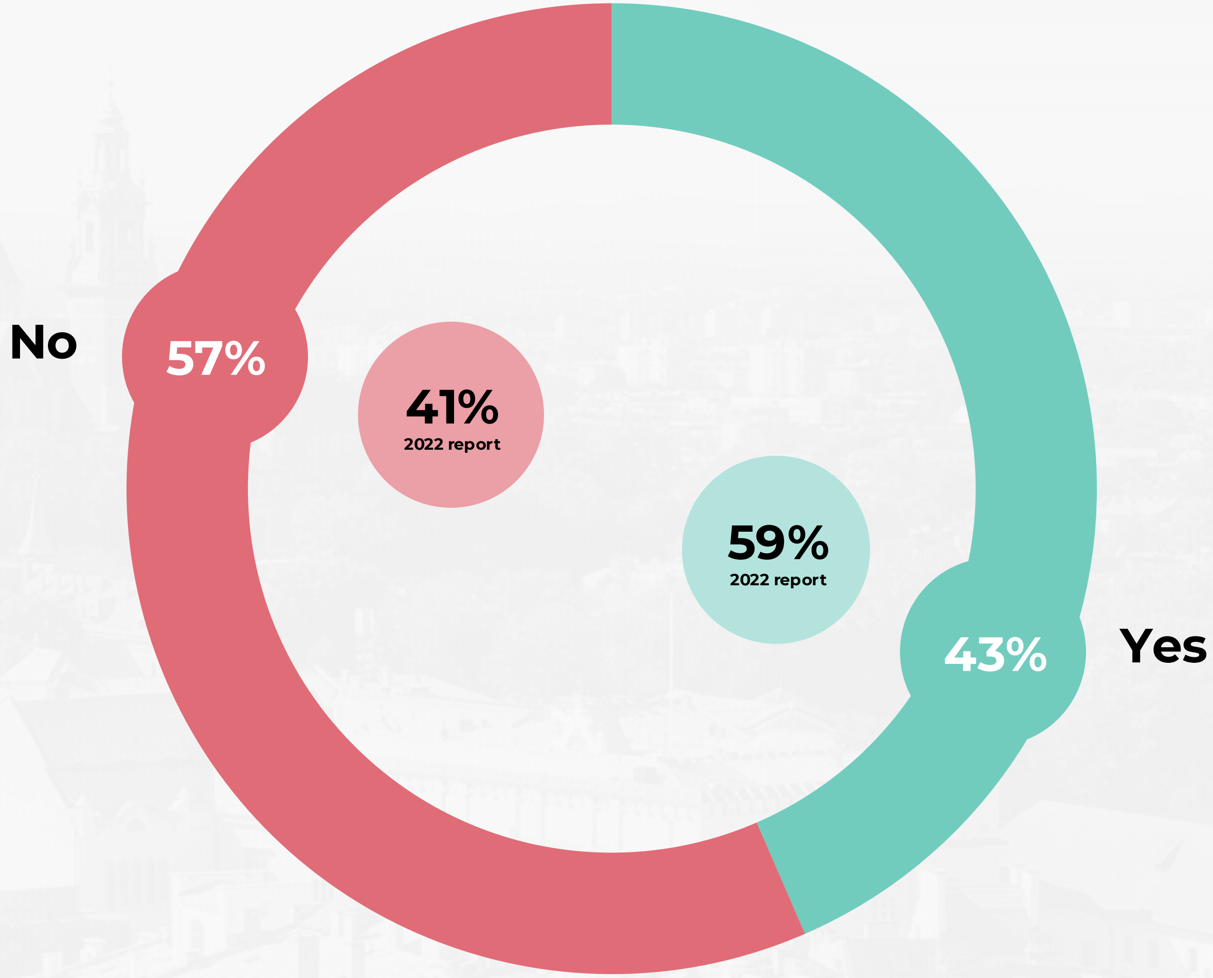
Digitalisation and Automation:

- **AI:** GenAI agents, Voice AI, Chatbots, AI enhanced reconciliation, translation tool
- **Framework:** SAFe Agile, AI-supported CI/CD
- **Automation tools/platforms:** UiPath, Celonis, OCR/ICR

Other

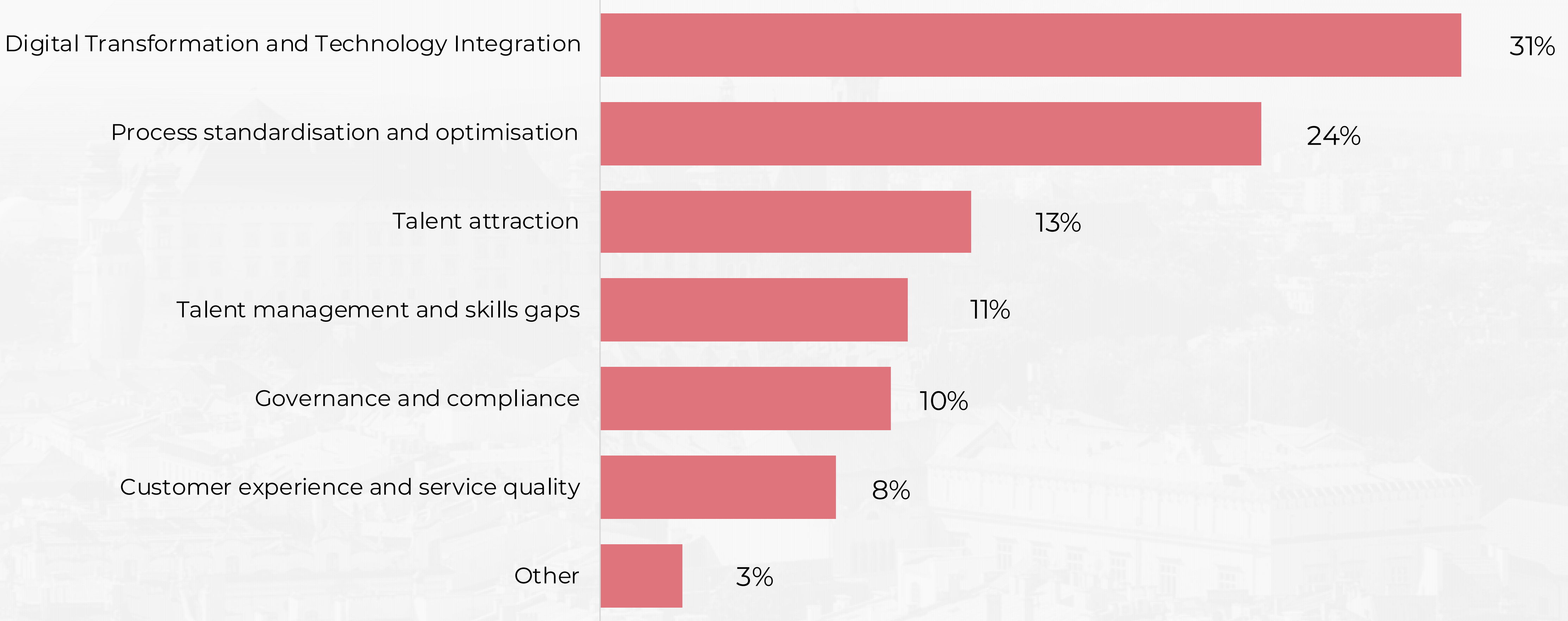
Strategic:

- **Location Strategy:** Global policy re-refining organisational presence and hiring practices



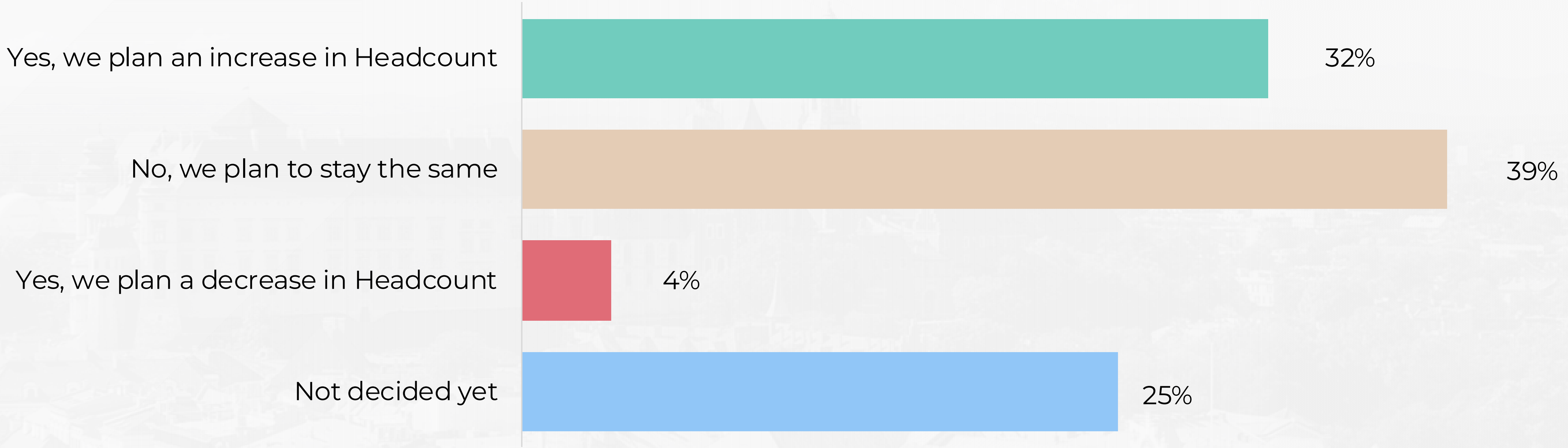
The biggest challenges facing centres remain Digital Transformation, Process standardisation and Talent attraction

What are the biggest challenges in your centre?



The Krakow Centres' market remains stable, enabling organisations to maintain their current headcount or to increase it slightly

Are you planning a change in Headcount in your Centre over the next 12 months?



Key conclusions

Continued market growth although slower

Still driving value and efficiency gains

Centres of Excellence as key enablers

Digital Transformation remains a challenge

Participating Companies

ABB
abbvie
AgileOne
A|M|S
AON
ASSA ABLOY
AUTODESK
Brown Brothers Harriman
Capita

ClearCourse
cornerstone
cytiva
dyson
euroclear
Farnell AN AVNET COMPANY
GlobalLogic A Hitachi Group Company
HAVI
HAYS

HEDGESERV
Heineken
HERBALIFE NUTRITION
HID
HUNTSMAN
IAG GBS
IBM
IMI Hydronic Engineering
IMPERIAL BRANDS

Jacobs
KONGSBERG
LTIMindtree
Lufthansa
N-iX
PEGA
PEPSICO
qualtrics XM
qurate RETAIL, INC.
revvity

zendesk
Sabre
Walstead CENTRAL EUROPE
sappi
tipico
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STATE STREET
Sterling Outsourcing


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