



ASPIRE & MANA HR

\$ALARY TRACKER

SSC/BPO/IT KRAKÓW SALARY BENCHMARK

SALARIES • RAISES • TRENDS • LANGUAGES



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INTRODUCTION

We are pleased to present the ASPIRE Salary Tracker, produced in association with manaHR.

The Tracker aims to provide insight into salary trends in the business services sector in Kraków, a market of more than 100,000 tech and business services professionals.

In this issue we focus on the evolving impact of COVID on recruitment and salaries, as well as a profile of the market for languages in Kraków.

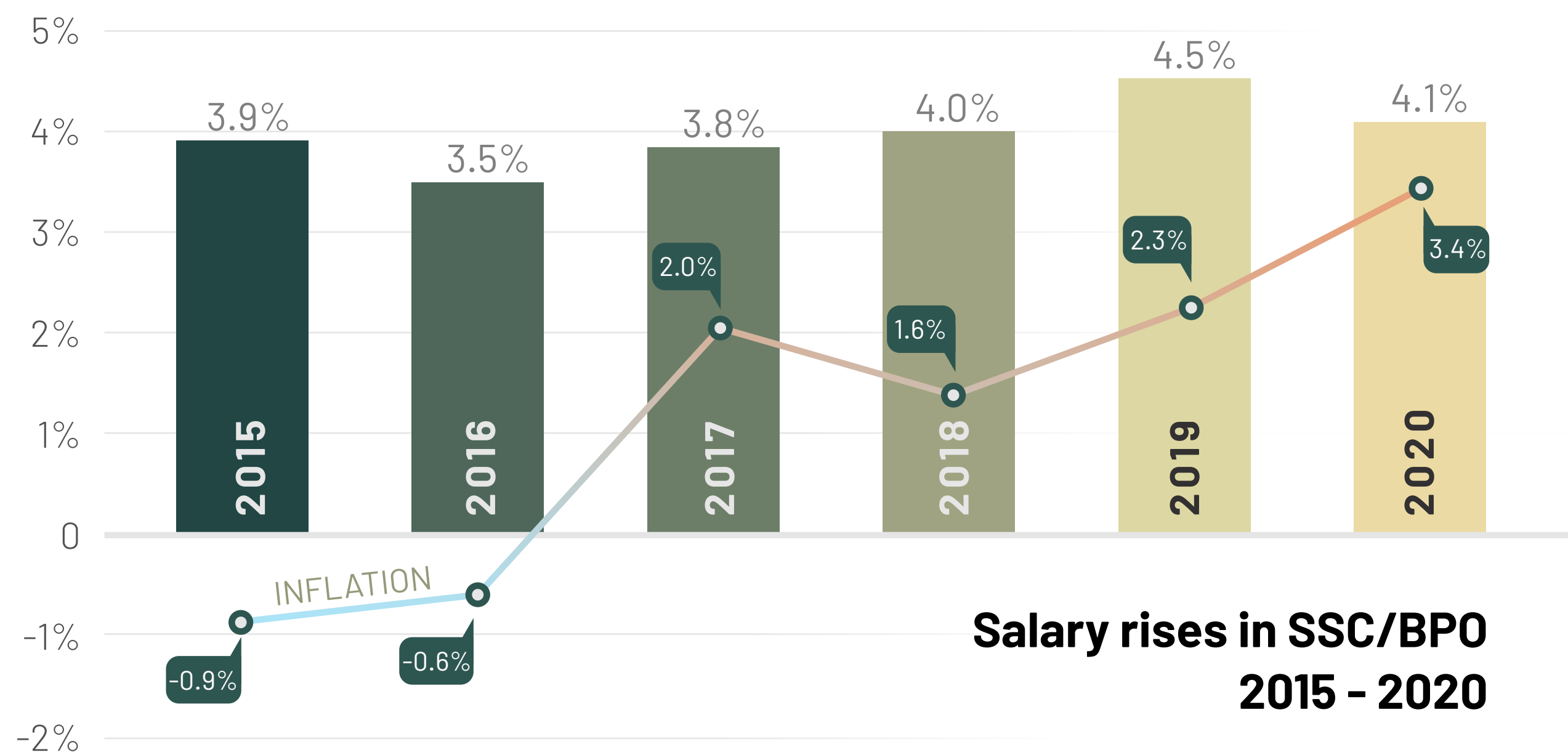
Data for the ASPIRE Salary Tracker is drawn from and serves as a complement to manaHR's quarterly Business Services Salary Survey.



SALARIES

SALARY RISES 2015-2020

- Salaries have remained stable during this period (in nominal terms the annual increase has fluctuated between 3.5% and 4.5%).
- In real terms the rate of salary increases has slowed. This has been the case during COVID but was also trending prior to COVID.



**Salary rises in SSC/BPO
2015 - 2020**

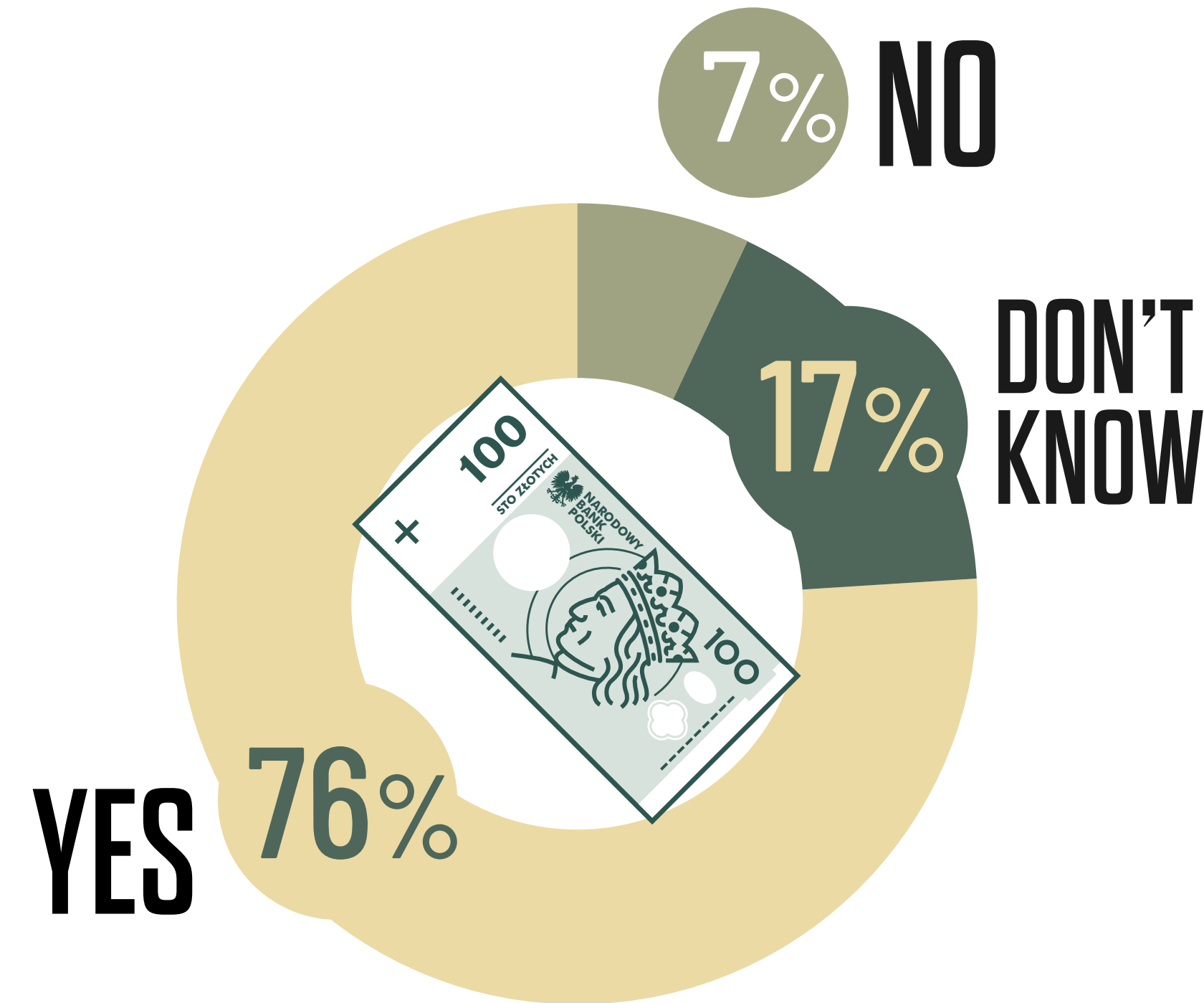
Source: Challenges of HR departments in SSC BPO centres in the era of the coronavirus pandemic, manaHR October 2020, n=29 companies



SALARIES

ARE YOU PLANNING SALARY INCREASES FOR 2021?

- At October 2020, 76% of companies were planning salary increases in 2021.
- 23% of companies planned increases in January 2021; almost 50% planned increases for April.
- manaHR reports that the average increase across all industries for which they conduct salary surveys is 4.6%.



Source: Challenges of HR departments in SSC BPO centres in the era of the coronavirus pandemic, manaHR October 2020, n=29 companies



SALARIES

SALARY CHANGES, JANUARY 2020 - JANUARY 2021

Types of salary

Monthly Basic Salary	+1.8%
Monthly Base Pay	+1.9%
Monthly Total Pay	+1.3%



Monthly Basic Salary - monthly salary payable under the employment contract.

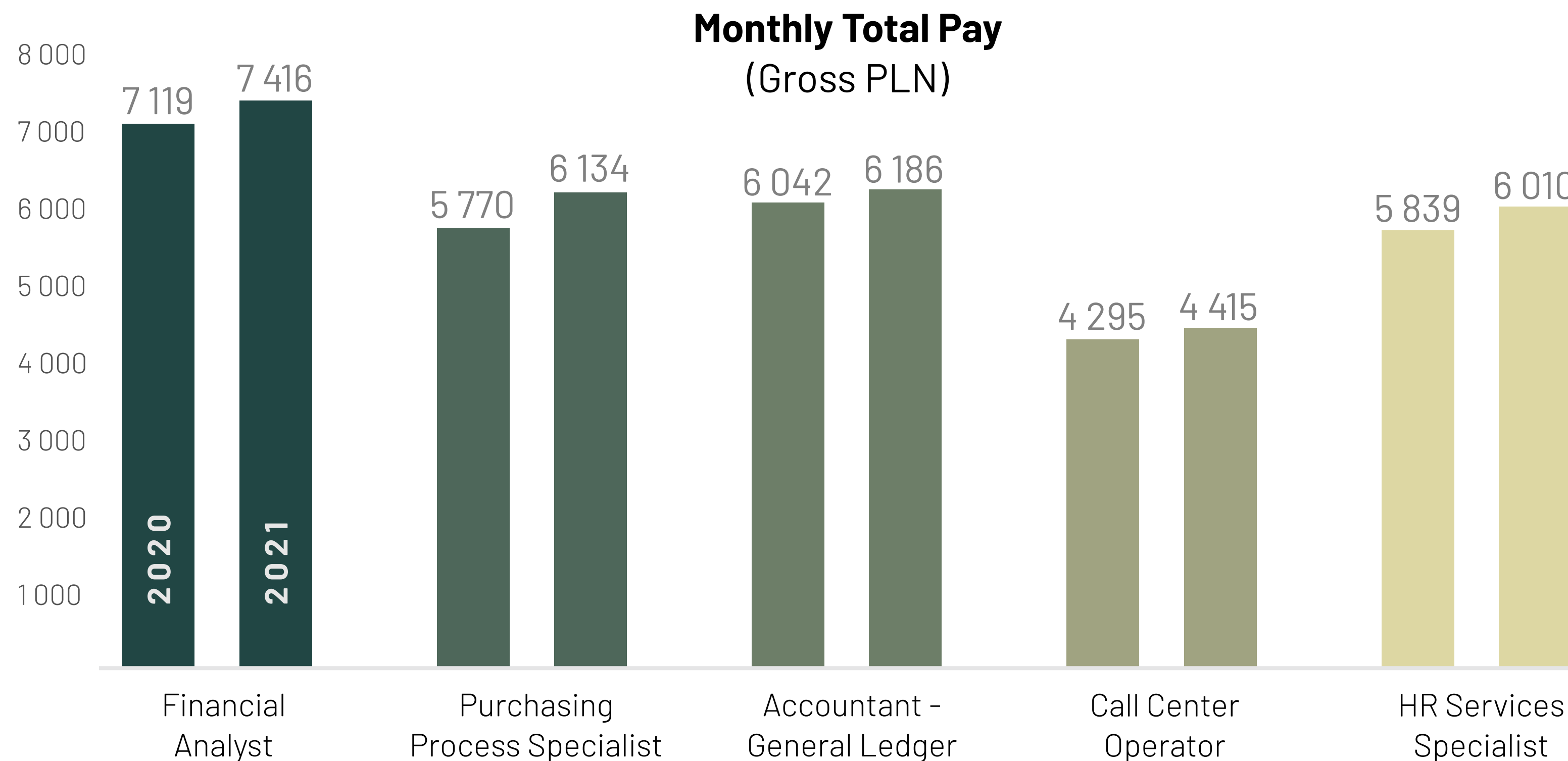
Monthly Base Pay - monthly remuneration including fixed allowances for performing specific tasks and roles or working conditions.

Monthly Total Pay - monthly base remuneration combined with all bonuses and commissions related to the employee's output, effectiveness or results.



SALARIES

RAISES FOR SPECIFIC ROLES, JANUARY 2020 - JANUARY 2021

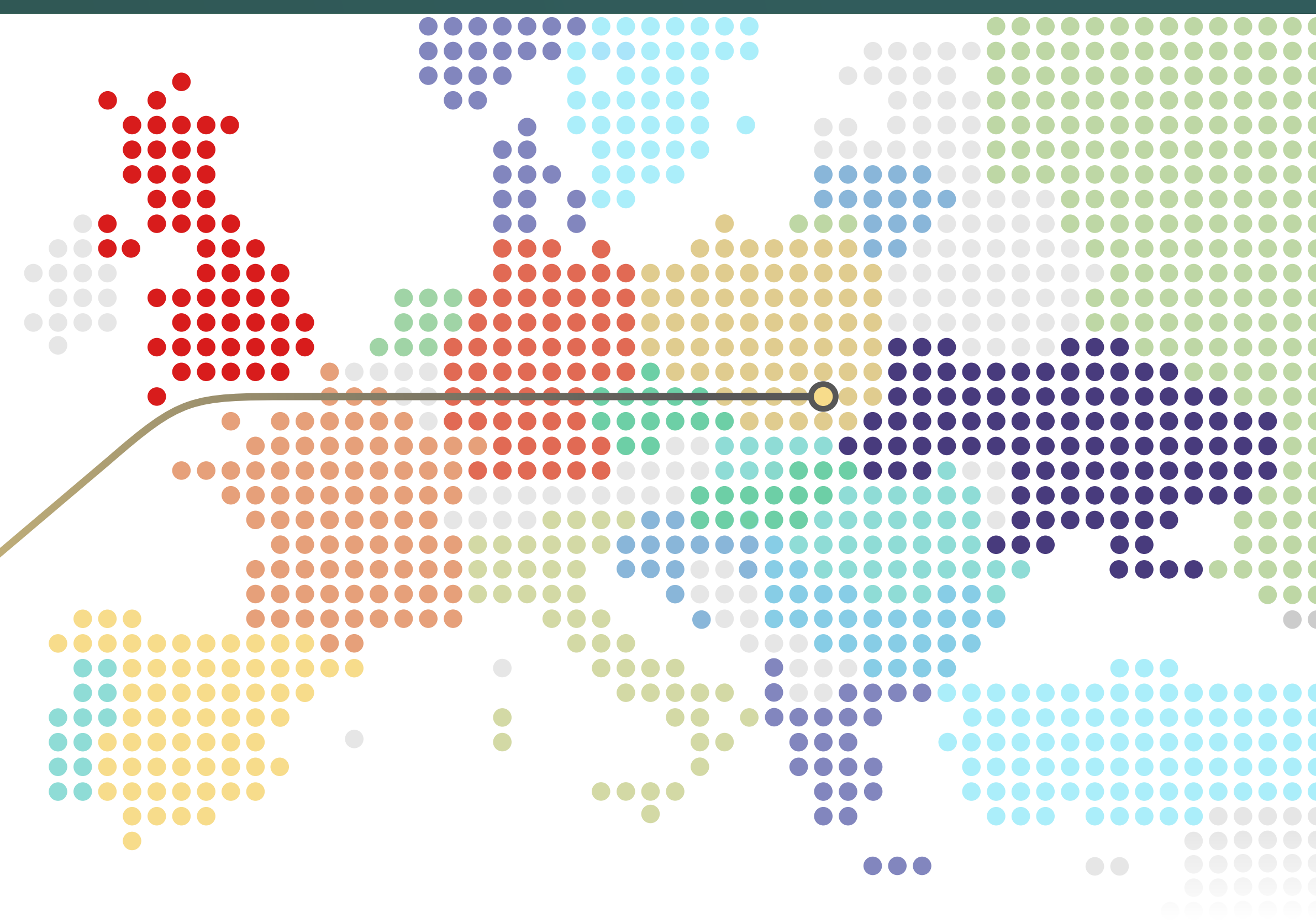
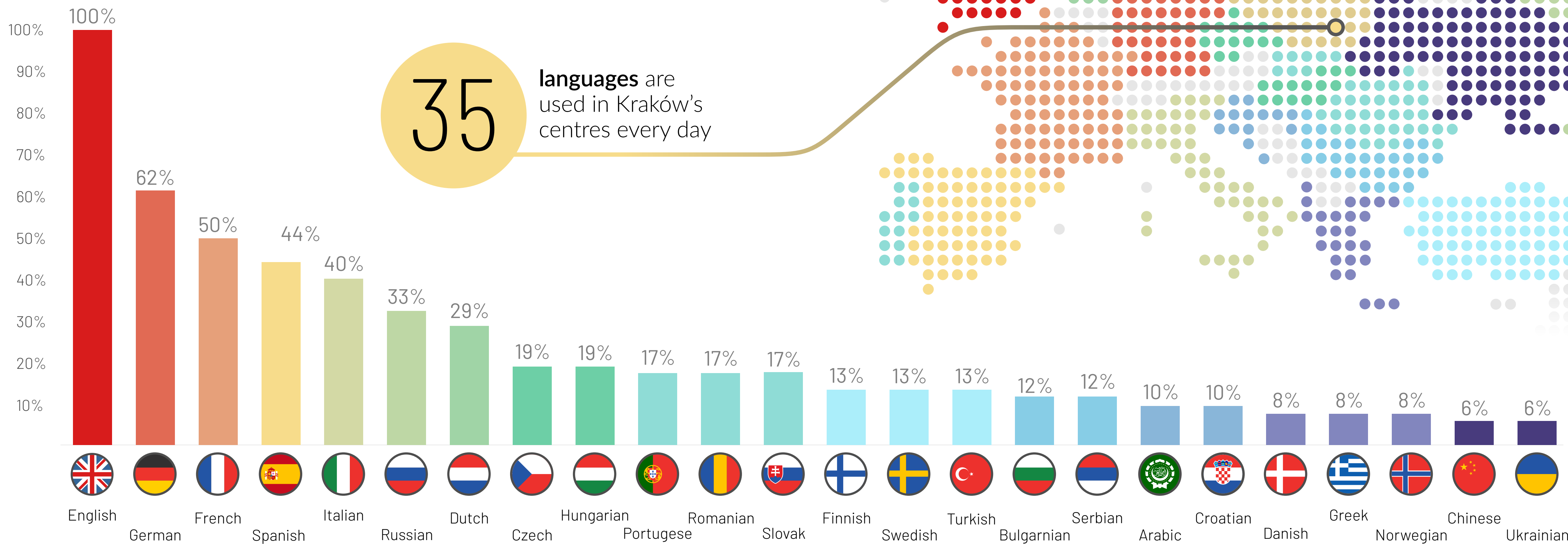


Source: SSC/BPO Salary Survey manaHR January 2020, SSC/BPO Salary Survey manaHR January 2021



LANGUAGES

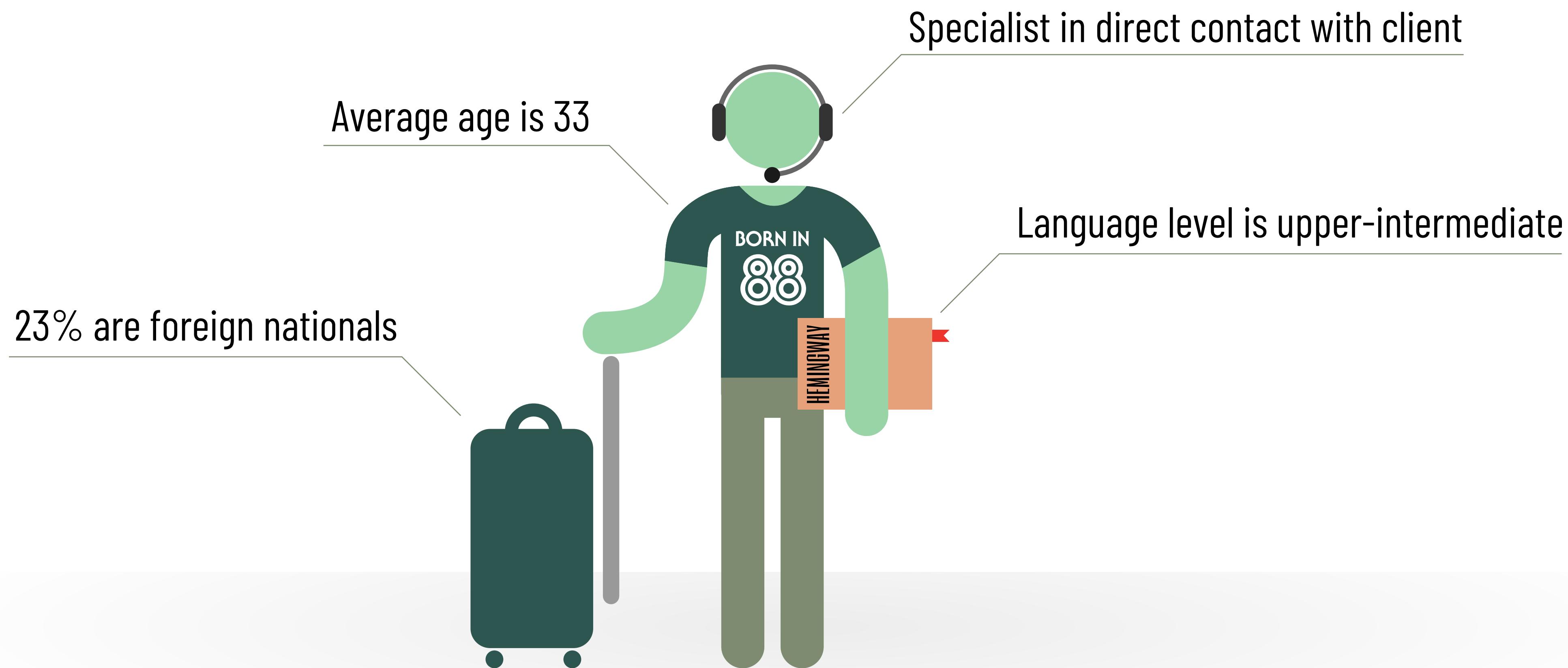
% OF CENTRES USING A GIVEN FOREIGN LANGUAGE





LANGUAGES

TYPICAL BUSINESS SERVICES EMPLOYEE



Based on 12 325 samples

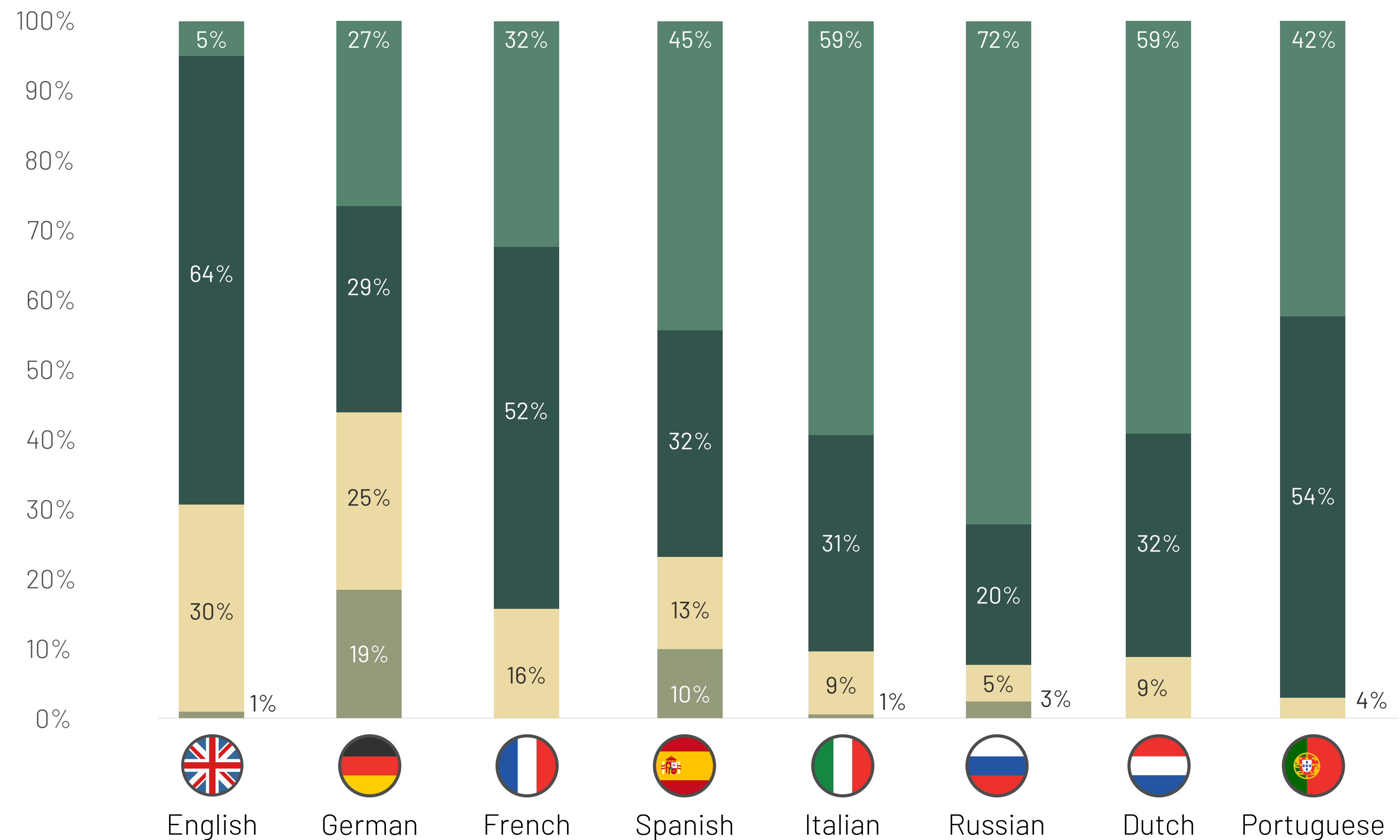
Source: Foreign languages and salaries in SSC/BPO, manaHR July 2020, n=53 companies



LANGUAGES

REQUIRED LEVEL OF LANGUAGE SKILLS (SELECTED LANGUAGES)

- **C1/C2** - Advanced/Proficient
- **B2** - Upper-Intermediate
- **B1** - Intermediate
- **A1/A2** - Beginner/Pre-intermediate

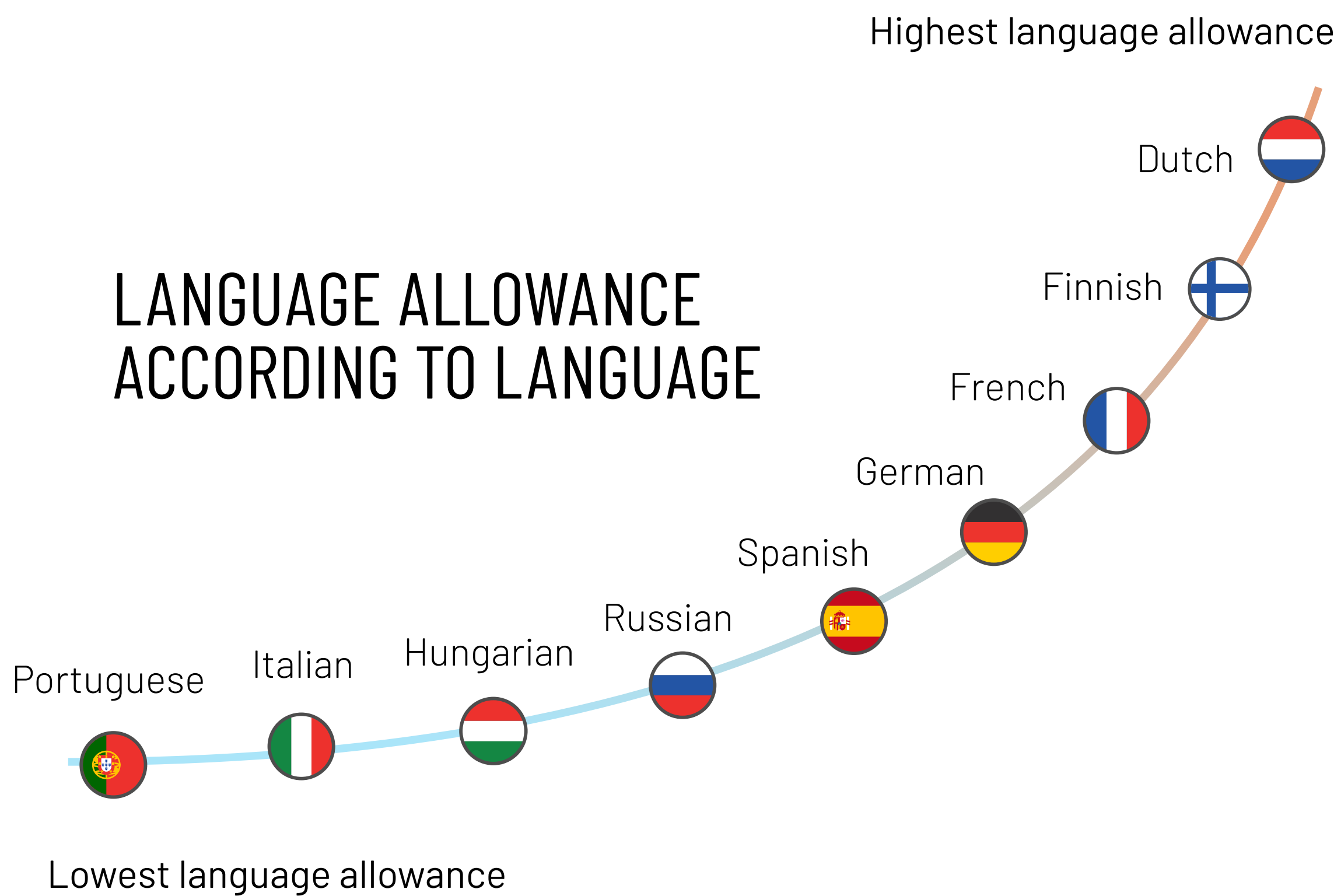




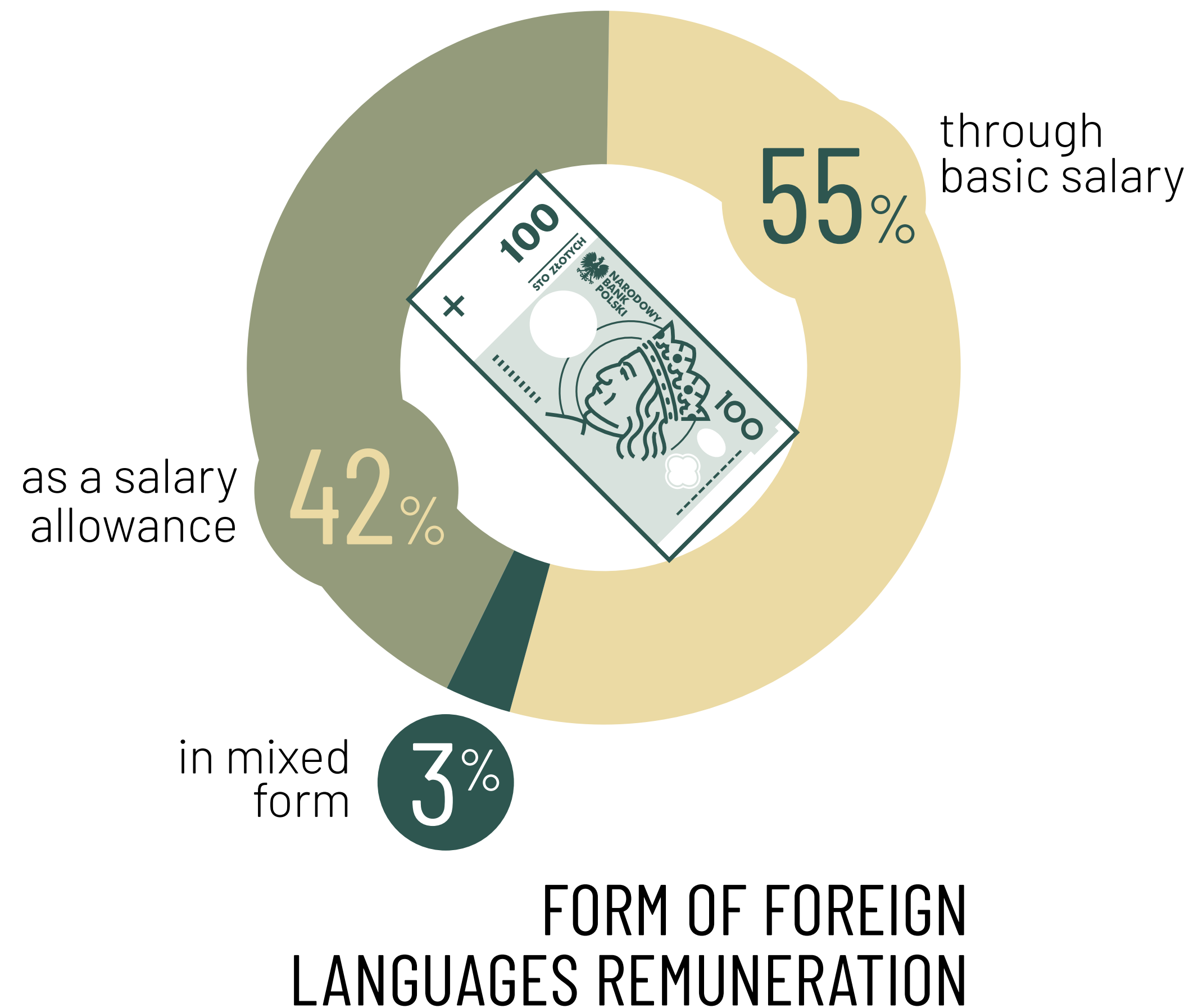
LANGUAGES

REMUNERATION AND ALLOWANCES

LANGUAGE ALLOWANCE ACCORDING TO LANGUAGE



Source: Foreign languages and salaries in SSC/BPO, manaHR July 2020, n=53 companies



Source: Foreign languages and salaries in SSC/BPO, manaHR July 2020, n=39 companies with languages other than English




LANGUAGES

RAISES FOR SPECIFIC ROLE ACCORDING TO LANGUAGE

Accounts Payable Accountant
Annual salary increase, 2019-2020

German  **+10%**

French  **+7%**

Italian  **+4%**

Spanish  **+2%**



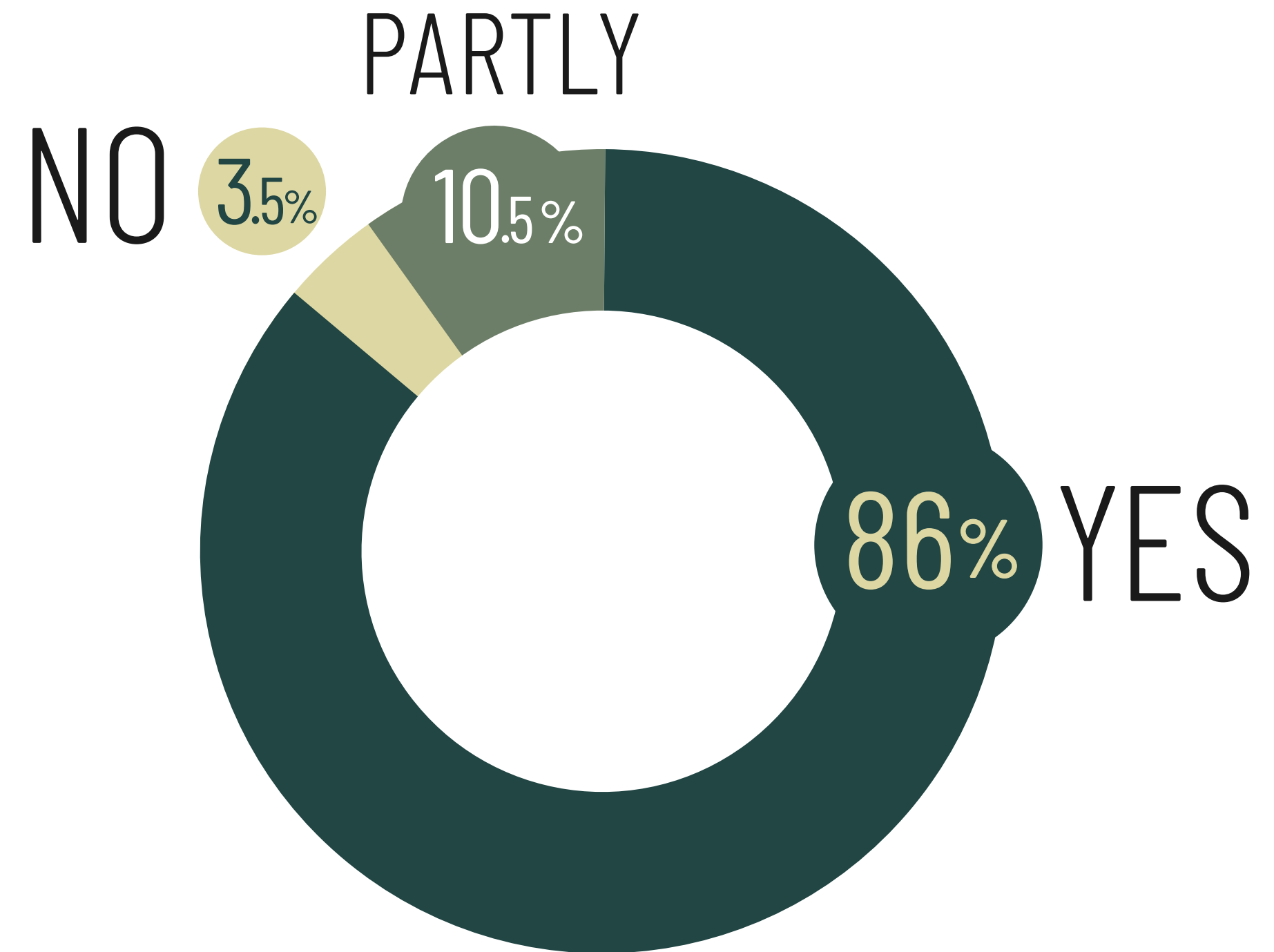
The next analysis of Languages remuneration will be conducted in July 2021.



HR

RECRUITMENT PROCESS

- In March 2020, many companies put a hold on recruitment.
- By October 2020 the situation for most had stabilised.
- In 2021 we anticipate an acceleration in recruitment as new projects are undertaken.
- Only 3% of companies had no processes open compared with 28% in March 2020.
- 52% of businesses reported that COVID had not affected their recruitment strategy over the next 6 months; 48% however reported that it had
- 17% reported that they were only recruiting for key roles.



Do you conduct recruitment processes?

Source: Challenges of HR departments in SSC BPO centres in the era of the coronavirus. manaHR October 2020, n=29 companies



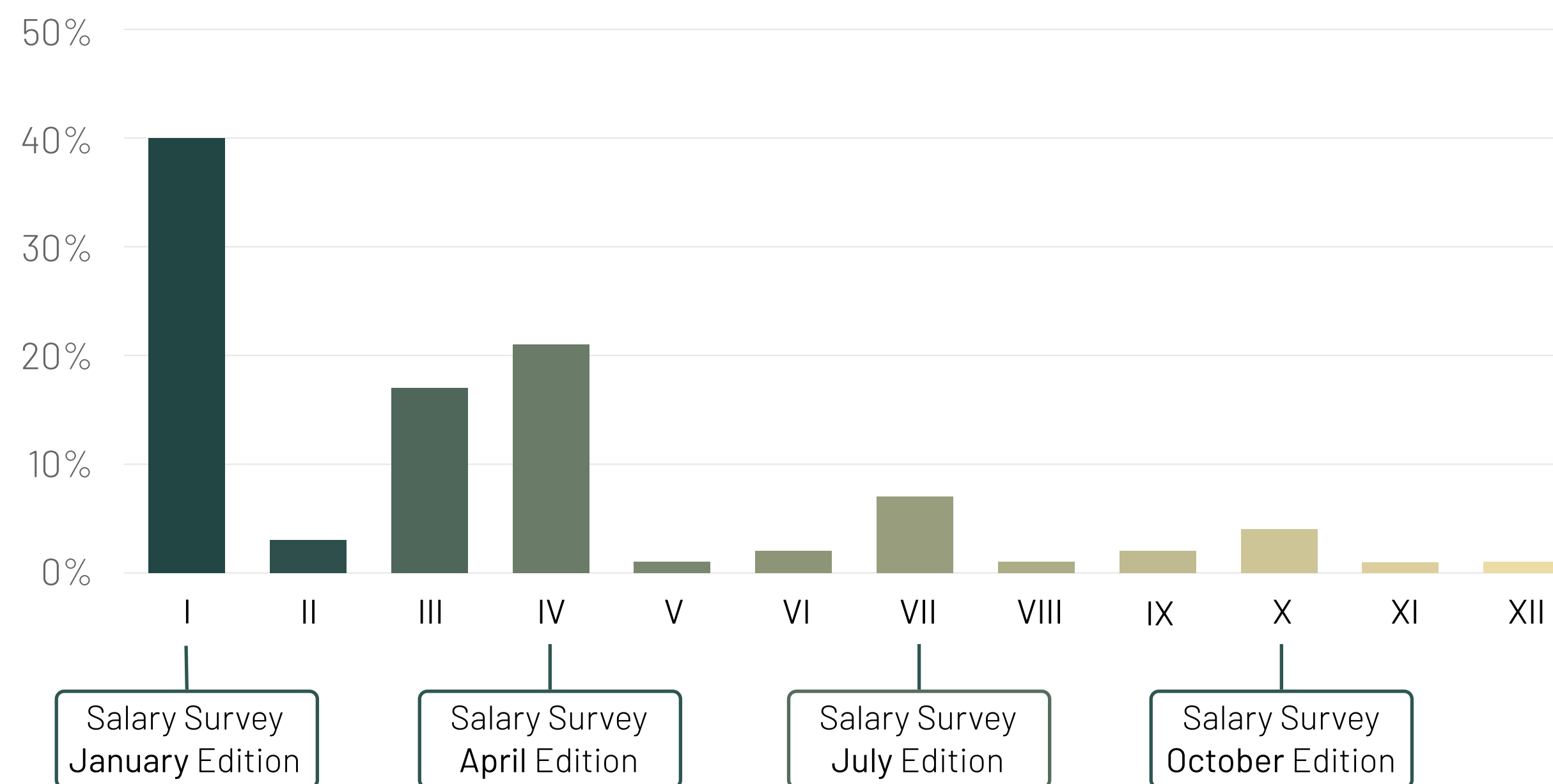
manaHR SALARY SURVEYS

manaHR Salary Surveys provide information of industry specific pay rates, benefits and planned pay rises, delivered directly by HR departments of participating companies.

The Salary Survey of Business Services in Poland is the most widely adopted salary survey for the business services sector in Poland.

The survey is conducted each quarter.

Percentage of companies awarding pay rises in a given month

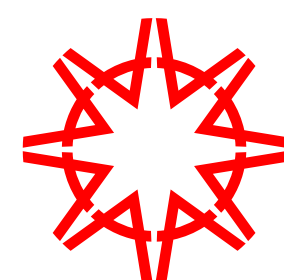




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