



HOA
HUNGARIAN SERVICE
& OUTSOURCING
ASSOCIATION

Business Services Benchmark Survey

Hungary, 2017



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In 2017, HOA is publishing its traditional HOA Business Services Benchmark Survey for the fifth time in order to provide a comprehensive study to its members and all the players of the sector in Hungary, in the region and globally. The study contains reliable, comparable and accurate data to all stakeholders of the industry. Based on our research, results of the HOA survey are reliable and representative by more significant factors like size, location, industry and services portfolio of the business services centers.

In order to make the benchmarking study more professional, from this year on, HOA is in a strategic co-operation with the Institute of Management at Corvinus University of Budapest, which is the leading and prestigious educational, research and consulting center of business services in Hungary.

Furthermore, due to our redefined strategy and as a consequence of the changes happening in the business services sector globally, we have amended and enhanced the study to show a more detailed picture on how the business services centers are growing and maturing by undertaking and performing more higher value-added processes and by preparing their operations to the digital transformation and applying RPA and automation solutions. As HOA is conducting the survey for the fifth time in a row, comparison data of the 2013, 2014, 2015 and 2016 results are also published in the report.



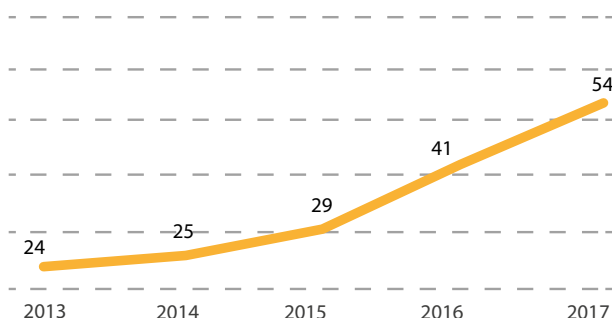
The Hungarian business services and outsourcing industry has a developed and mature market. Next to the crucial factor of talent management, development and retention, the key strategic elements to elevate this industry to the next level and to exploit the global opportunities are moving up the value chain and finding the appropriate automation and digitization processes and procedures.

Balázs G. NAGY
President

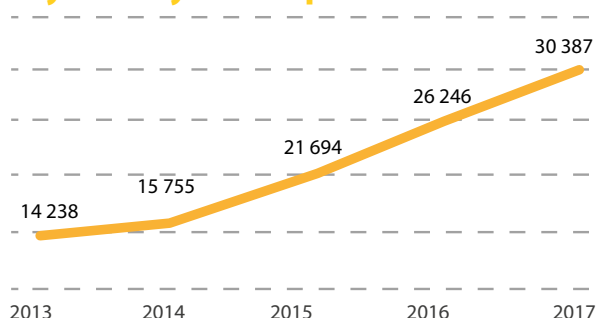
About the Participants

Building uniform terminology: as in the global business services market so in Hungary, there are many different business organizations providing services with several titles like Shared Service Center (SSC), Business Support Center, Outsourcing Provider, Center of Excellence (CoE), Global Business Center (GBS), etc. In order to not confuse the stakeholders, in the future HOA uses a comprehensive term as Business Services Center (BSC) in this survey that is cut out for incorporating this diversified terminology.

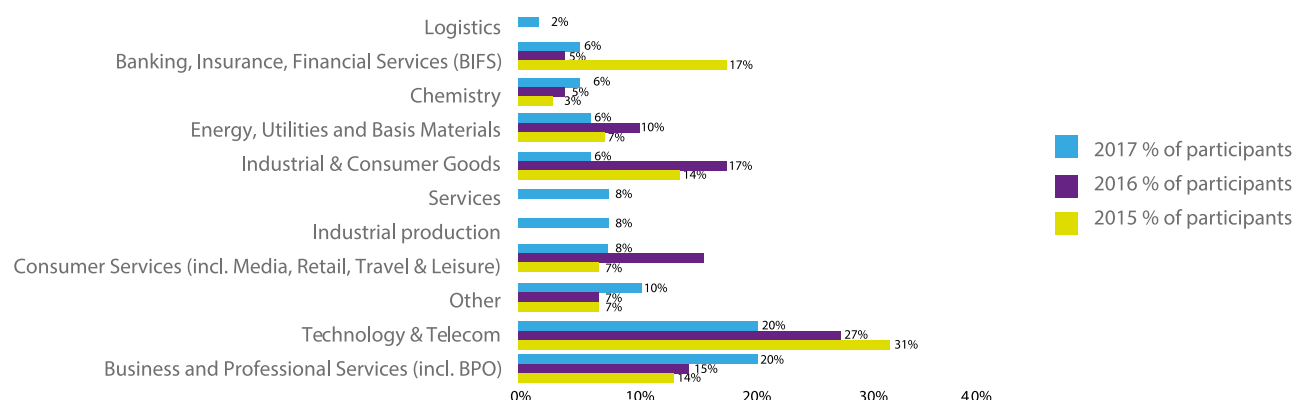
Number Of Participatipants In The Survey



Number Of Employees Represented By Survey Participants



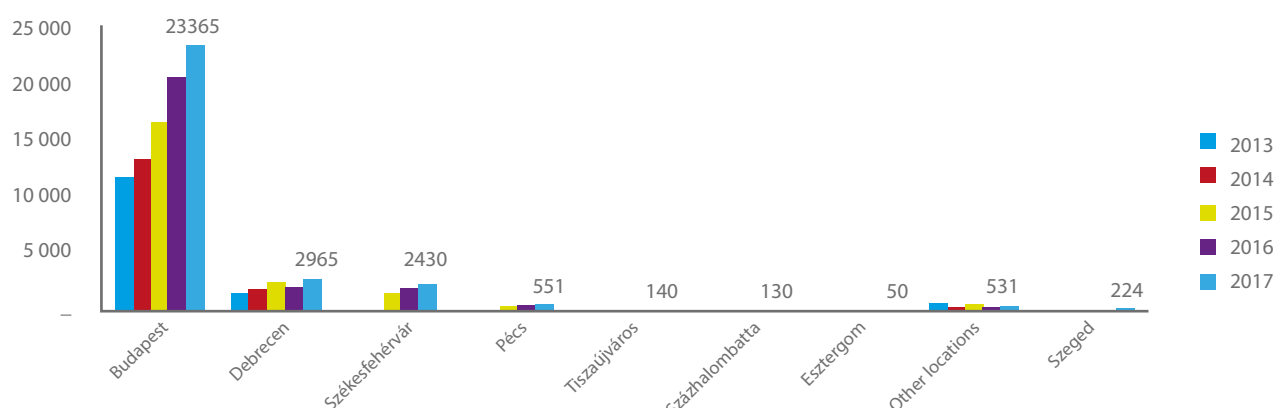
Survey Participants By Industry



The number of sectors represented by the different BSCs has grown during the last year as more companies filled in the questionnaire and, what is more important, these trend is bringing more high value-added processes to the centers operating in Hungary.

Survey Participants By Location

Participants employ altogether 30.387 people out of which 77% are located in Budapest, 9% in Debrecen (showing an increase of cca. 30%), 9% in Székesfehérvár and 5% in other cities, like Szeged, Veszprém, Tiszaújváros, Százhalombatta, Paks, Esztergom, Pécs.

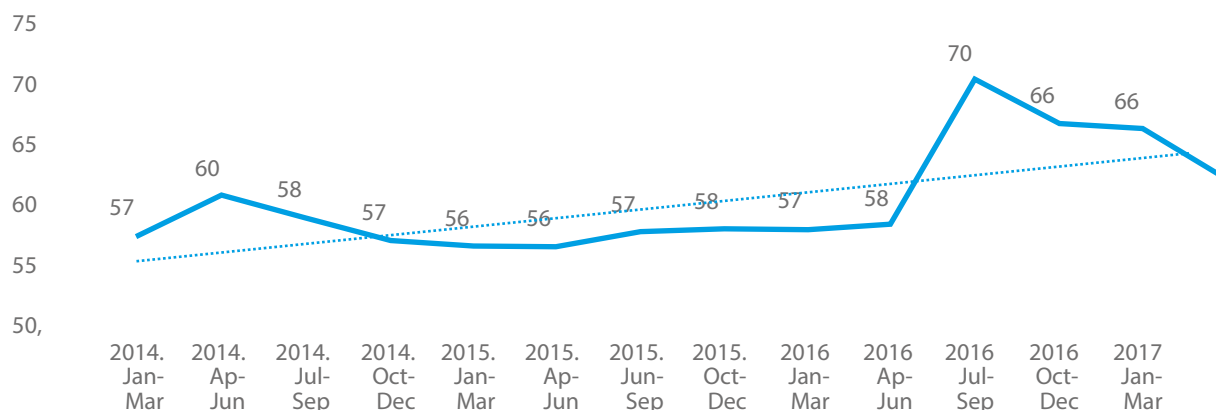


The Hungarian BSC market is still dominated by Budapest, 77% of the people are employed in Budapest, however, more non-Budapest locations are forming part of the Hungary service center map.

Survey Participants By Size

The participants of the survey employ 62 people on average, 49% of firms participating employ 0-200 people which comes from the fact that many newly founded (2011-2017) BSCs participated in the survey, 26% employ more than 1000 people.

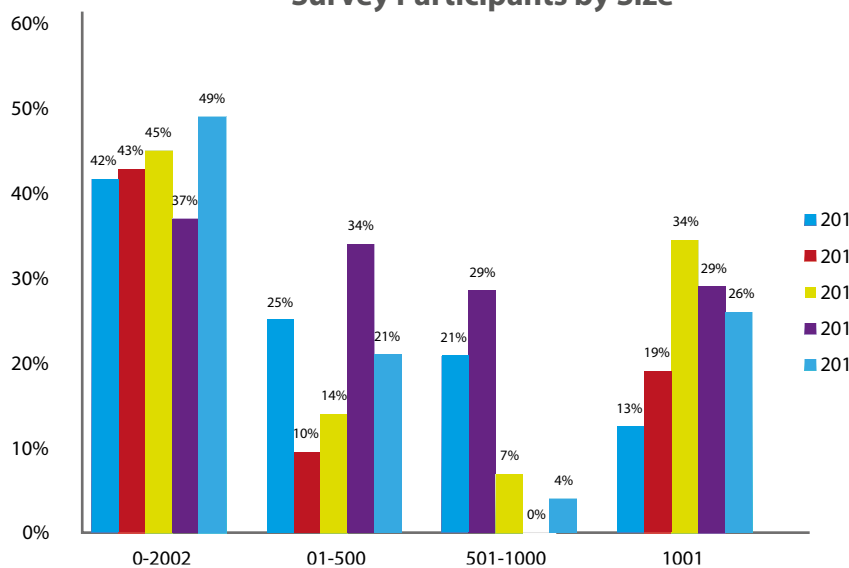
**Number Of Employed Persons in Administrative And Support Service Activities
(thousand persons)**



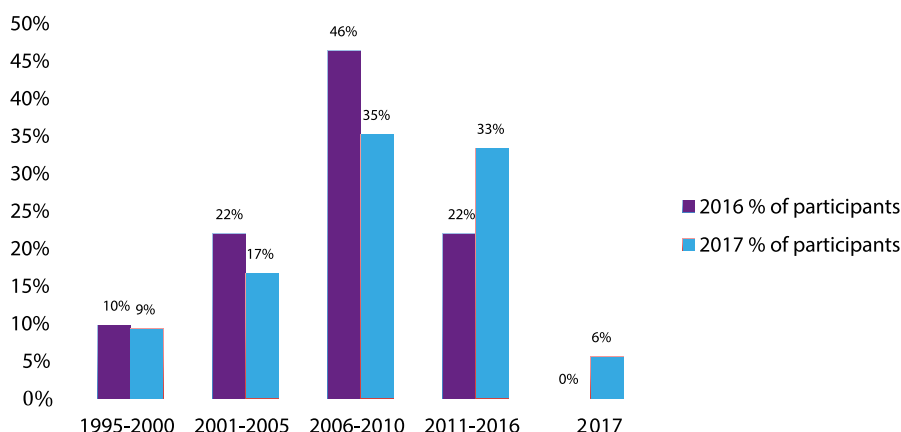
Survey Participants By Start Date In Hungary

This year, a higher number of relatively new BSCs participated in the survey, that were established between 2011 and 2017.

Survey Participants by Size



Survey Participants By Start Date In Hungary

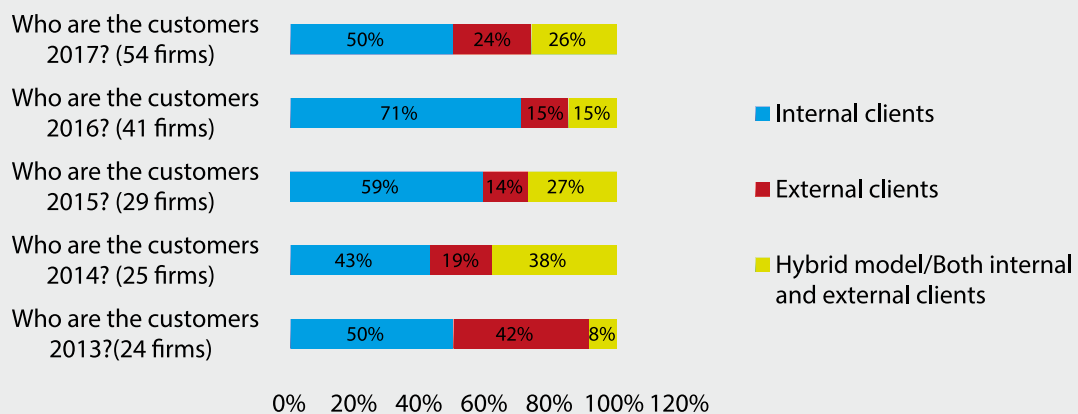


Supported Customers, Regions And Services

Customer Portfolio

50% of the companies participating are captive service centers, thus serving only internal customers - this is 20% lower than in 2016. It is similar than the European average if we compare it with the 48% fully captive ratio of SSON European Benchmarking Survey data. In 81% of the participating firms there are Service Level Agreements/Organization Level Agreements (SLAs/OLAs) in place to manage the performance of the Business Services deliverables.

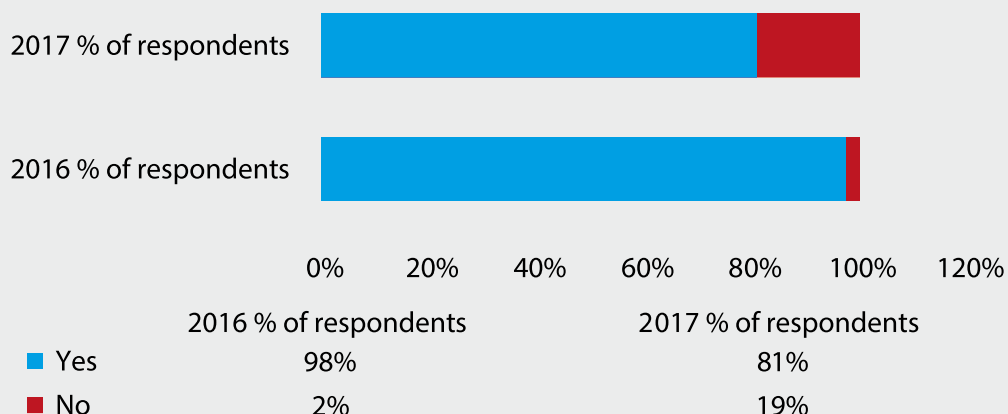
Annual Changes in Mix Of Captive vs Outsourced Service Provision (% of responses)



Regions Served

In terms of geographic reach, 58% of the participants provide business service processes in Europe, 55% globally, 25% Middle East and 11% North America, 46% service Asia (Middle East) and Africa and, despite the time differences, even Australia and Asia Pacific are being serviced by 17% of the participants. Although the split of services changed due to the large number of participants, the same observation can be made as last year: **the Hungarian BSC market still can be considered as a global service location and not only as a Europe time-zone center.**

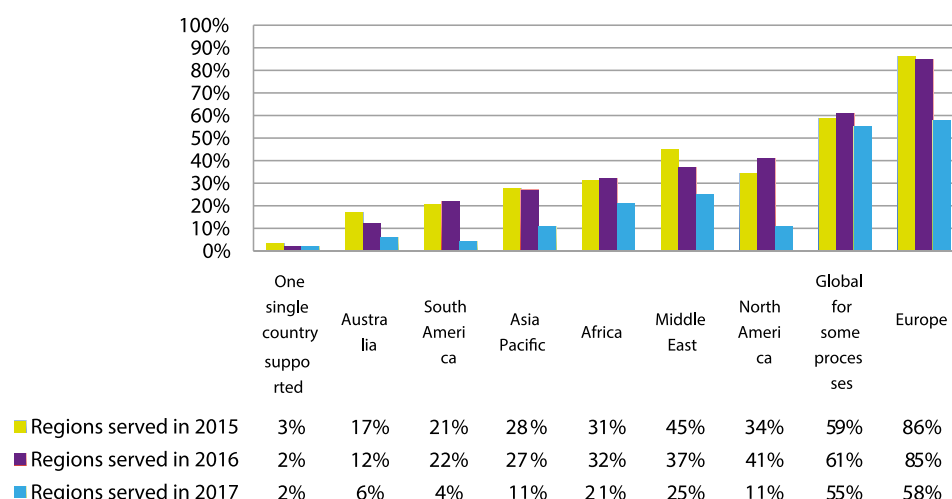
Business Services Centers Operating With SLAs/OLAs



Languages Supported

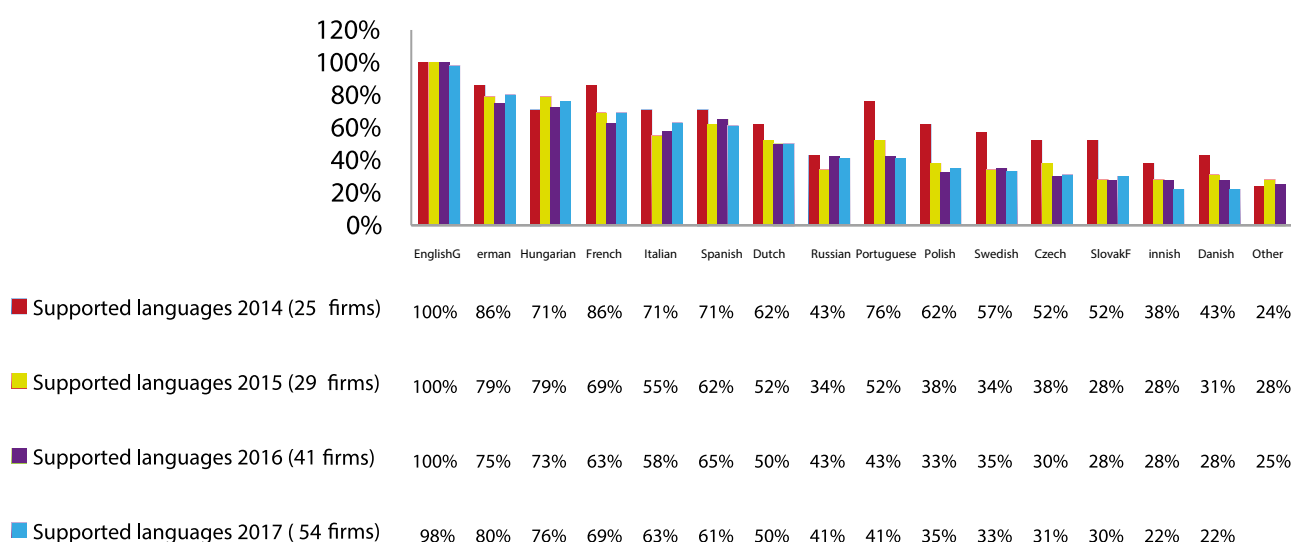
In 2017, more than 20 languages are supported by Hungarian Business Services Centers. The most commonly supported languages in order of frequency are: English, German, Hungarian, French, Italian, Spanish, Dutch, Russian and Portuguese. As the survey also shows, HOA is emphasizing again the focus on language education in all levels of the education programs. This is vital to maintain the BSC industry in Hungary. English is still a 'must' in all service centers; German is still the second most important language as in 2016. French, Spanish, Italian, Dutch and Portuguese are still in top 10. However, Russian has increased to 41%, thus entering the top 10. Polish, Swedish, Czech and Slovak are also important languages in the centers.

Geographic Regions Served by BSCs



59% of the companies claim that the main skill shortage that they face is language skills. One of the most common challenges for the centers is the shortage of rare languages (Nordic, Slavic etc.); not appropriate level of a language; or the lack of combination of language skills and professional qualities such as professional business or IT skills.

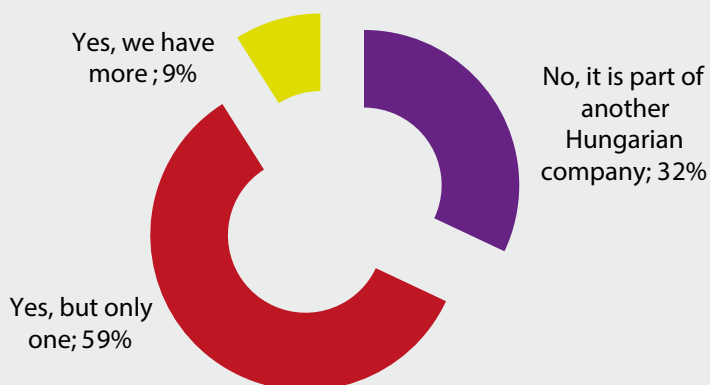
Service Delivery Of Participant Companies By Language (% of responses)



Legal And Financial Model

Companies still prefer to establish a separate legal entity for their business services operations with 59% responding that their BSC operates in a separate legal entity, whilst 9% of the companies have more than one legal entity for their BSC operations. This means an increase from 2016, now 68% of the companies operate with a separate legal entity. 32% of companies incorporate the BSC together with their other operations.

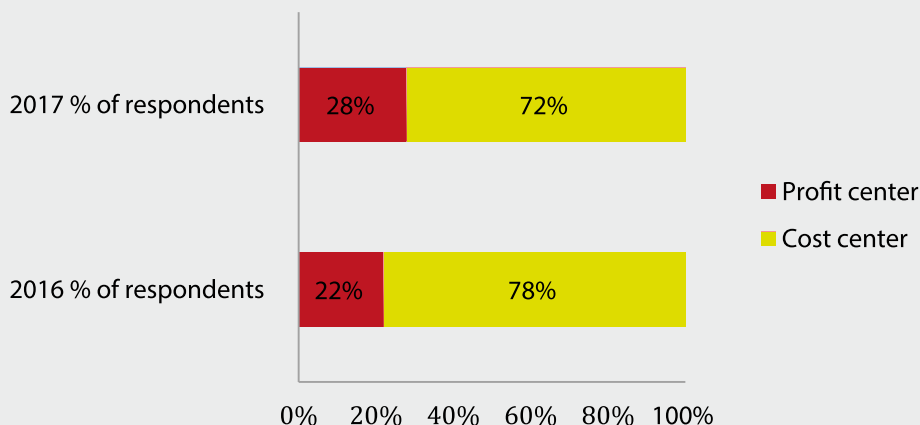
Legal Model Of Participating BSCs



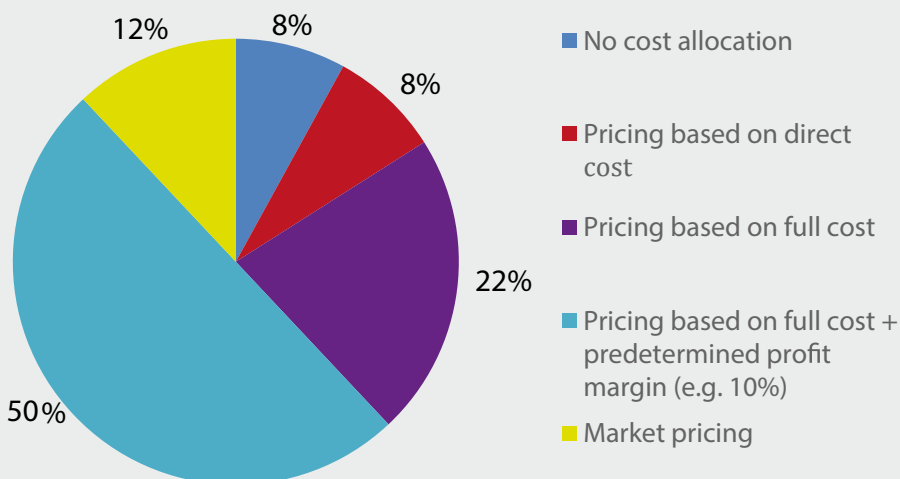
Compared to 2016, 28% of the companies operate as a profit center, which is a 6% increase. We can state that the cost center based concept of settlement seems to be still typical in the Hungarian BSC industry.

Financial Responsibility Model Of Participating Companies' BSCs

72% of the companies have a cost center as their responsibility center. 28% has a profit center, and none of them has an investment center.



Pricing Method



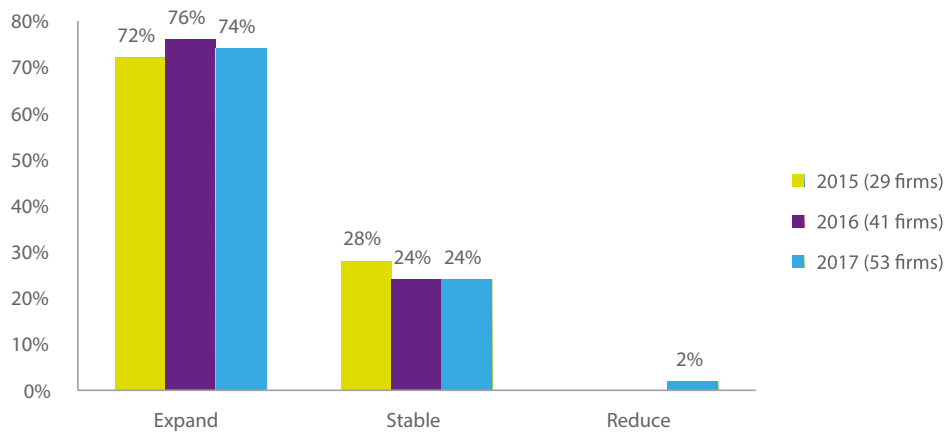
Half of the companies use pricing based on full cost method, combined with a predetermined profit plan. 22% of them use a pricing method based on full cost.

59% have the whole service portfolio provided when pricing charges for customers. 41% creates individual services based on a service catalogue.

Service Center Strategies In Hungary

The growth potential of the industry has been collected in the survey. 74% of the participants plan to expand their operations (39 firms); only 2% of the participants are planning any reduction. These trends are similar to 2016, except for the reduction.

Development Outlook For Participating Companies' BSCs

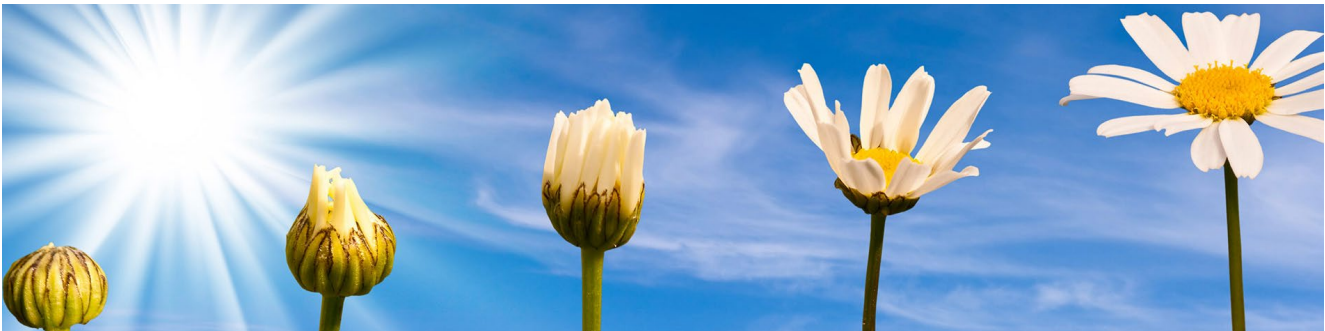
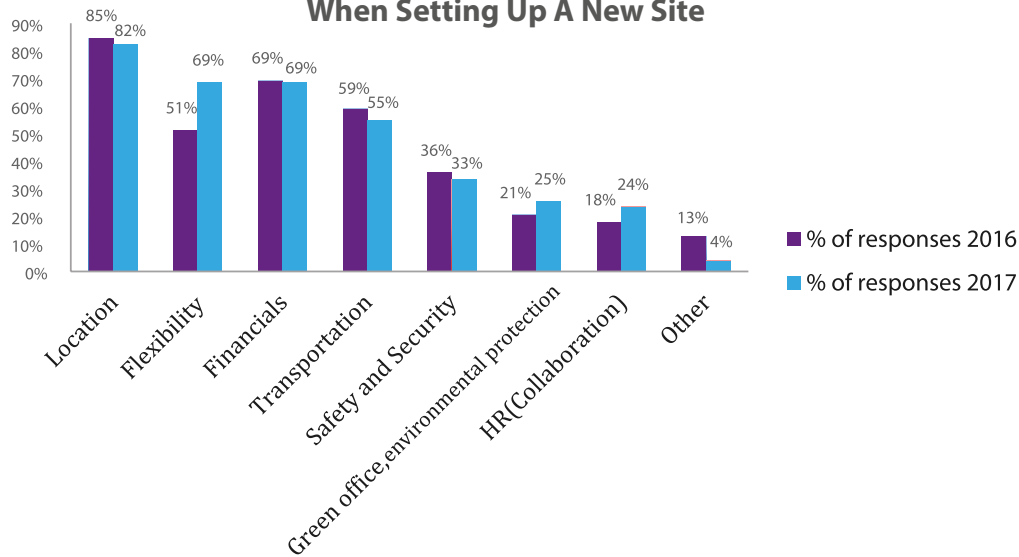


Expansion Plans Of Companies With Business Services Centers In Hungary

19 % of the responding companies are planning to open a new office center in Hungary, 11% in Budapest and 8% in the countryside.

When considering the factors for a new site, the top 4 factors the companies mentioned are: Location; Flexibility (expand, reduce, break option); Financials and Transportation.

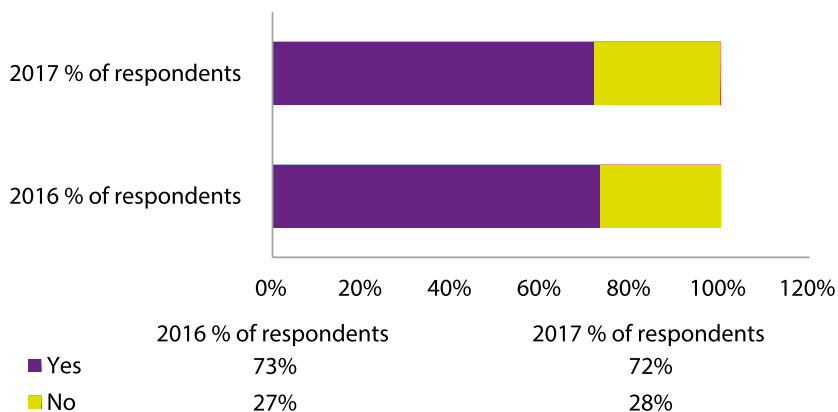
Factors Considered By Participating Companies
When Setting Up A New Site



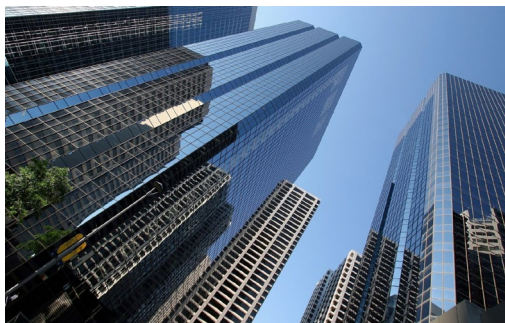
New Services Offered - Expansion

Similarly to 2016, 72% of the responding firms have brought new services to their Hungarian BSCs, which means that the companies are moving towards the center of excellence operational practice and try to move their operations up the value chain with activities requiring more complex processes in their service portfolio (see below).

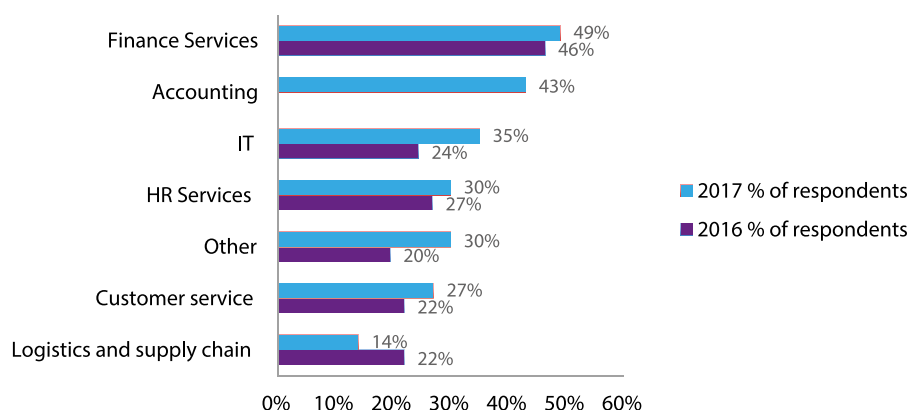
New Services Brought by BSCs Since 2016



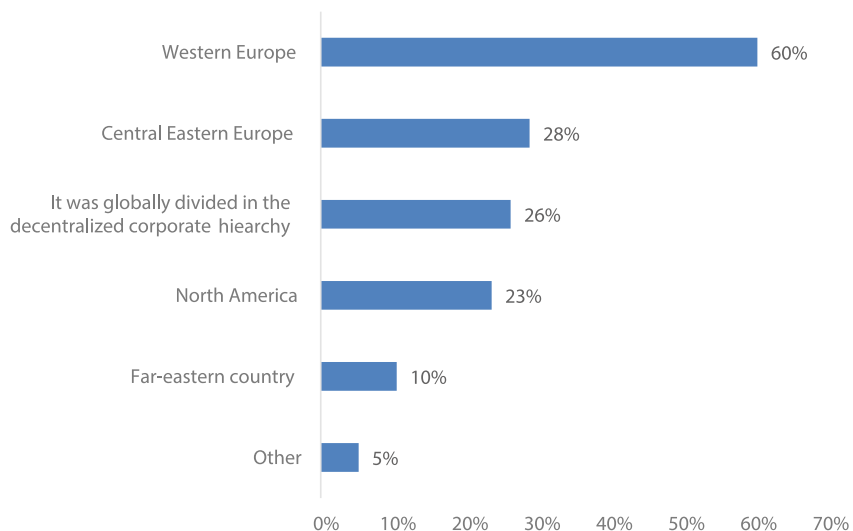
More than half (60%) of the new services were transferred from Western European countries and a significant amount (29%) from within the Central Eastern European region. 26% of the firms answered that the service was migrated globally in the decentralized corporate hierarchy. As the main reason for the transfer, efficiency and productivity were selected by the majority (54%), while considering costs only as second (32%). This trend shows slight improvement towards the strategic goal of increasing the amount of higher value-added services within the industry.



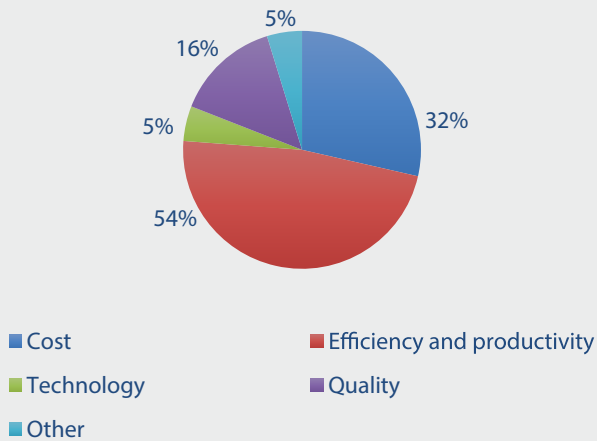
Services By Area Brought To BSCs During The Last 1 Year



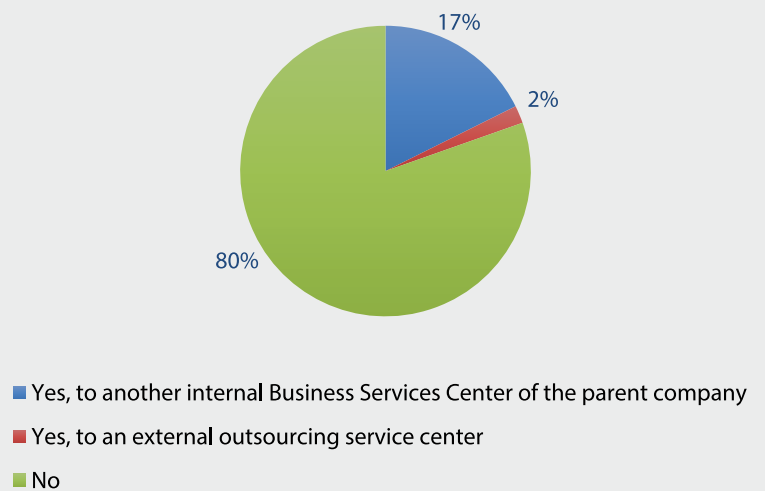
Previous Locations Of New Services Brought Into Business Services Centers In The Last 1 Year



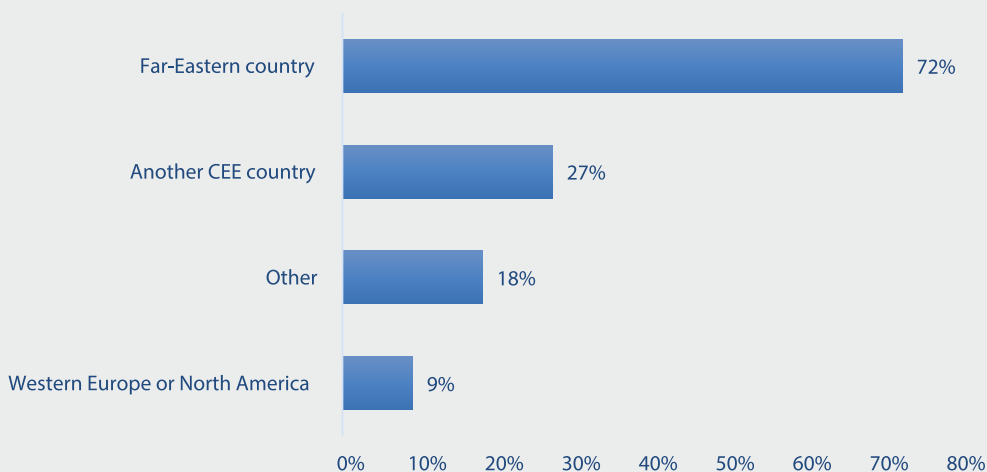
Reason Of Inbound Migration



BSC Firms Transferring Out Services To Other Business Services Centers In The Past Year

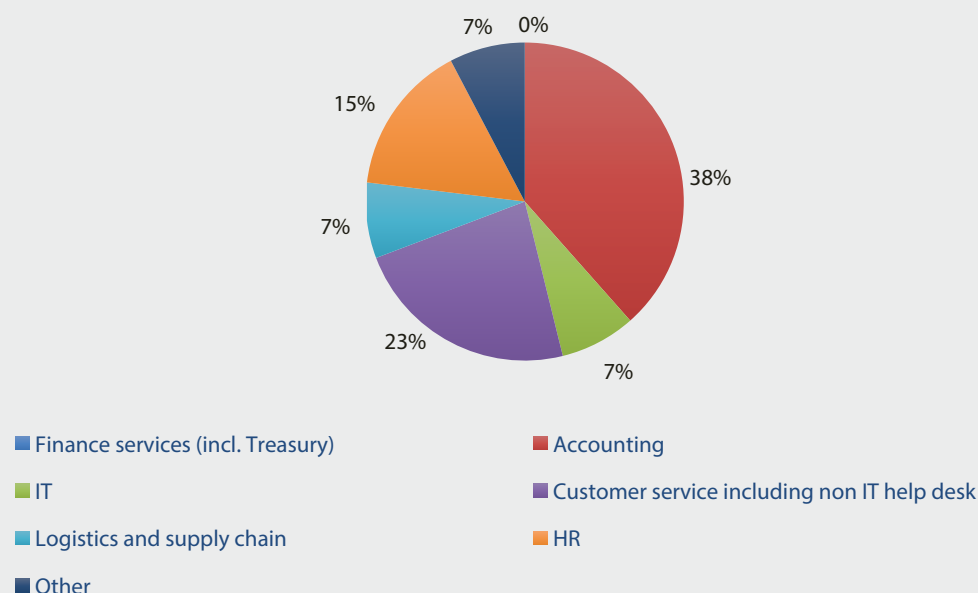


New Location Of These Services

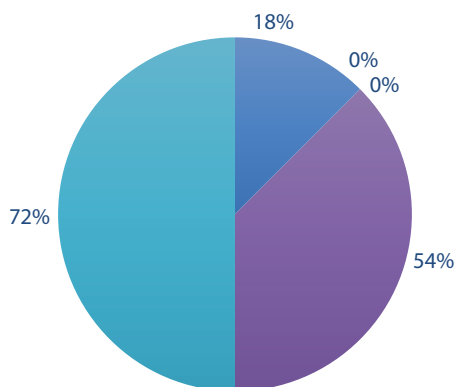


A great majority (80%) of the firms have decided against moving out services from their own businesses. The remaining 19% have moved services mostly to Far-Eastern countries (72%) or to another CEE country. Service migration towards Western Europe or North is not typical. Only 2% of the total outbound service migration has happened by outsourcing services to external service centers; clear majority have transferred services within internally to their own BSC at another location.

Kind Of Corporate Services Moved Out From BSCs



Reason Of Outbound Service Migration



In comparison with the trend of the inbound service migration, the main reason of outsourcing here is due to costs (73%) and only second to increase efficiency and productivity (54%).

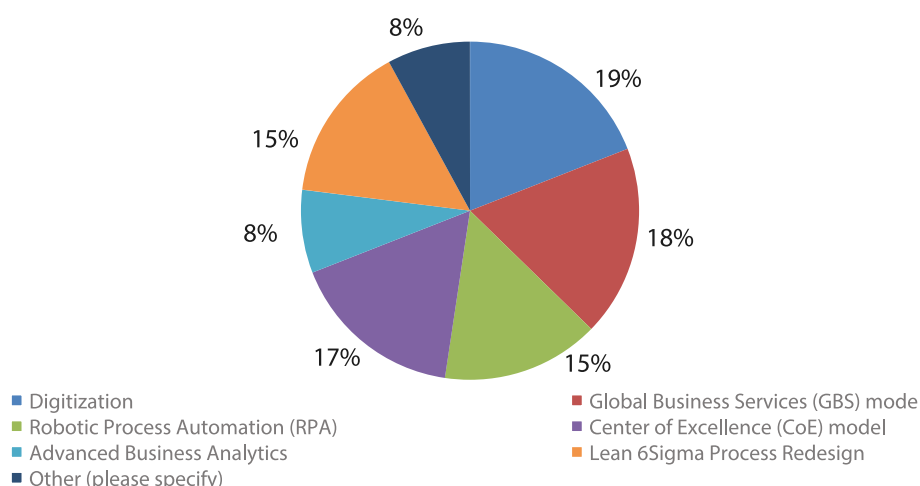
Other Quality Technology Efficiency and productivity Cost

Definition Of Center Of Excellence (Coe)

CoE means an organizational unit (sometimes a high value-added subsidiary) that embodies a set of shared capabilities that has been explicitly recognized by the firm as an important source of value creation, with the intention that these capabilities be leveraged by and/or disseminated to other parts of the firm.

The most important drivers of operating models in Business Services Centers on the Hungarian business services market nowadays are digitization, GBS, Center of Excellence, RPA, Lean/6Sigma. Based on the SSON European Benchmarking Survey in 2017, 16% of the respondents fully implemented and other 45% partly implemented the GBS model. We expect that the GBS model will be strengthened in our market in the near future as well.

Most Important Drivers Of Operating Models In Business Service Centers (% Of Respondents In 2017)

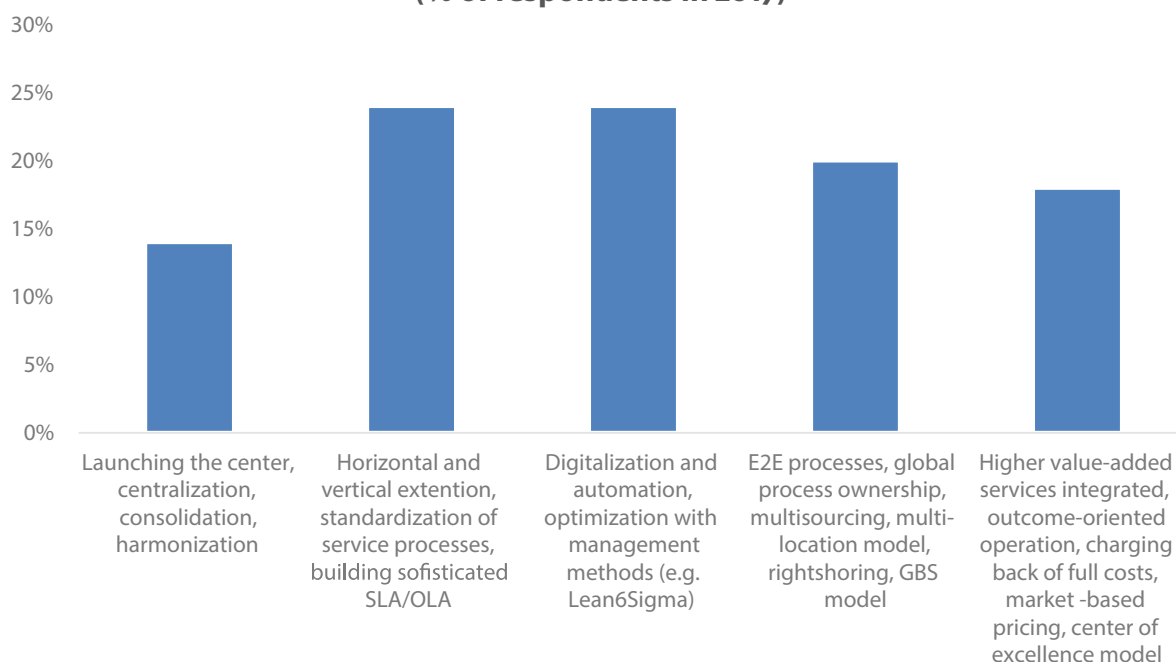


Definition Of Global Business Services (Gbs)

- GBS is defined as an integrated compilation of service offerings for multiple support functions within a company.
- This compilation of service offering is global in nature with respect to both delivery centers and customers.
- The provider of the individual services can be either internal or external but must be managed centrally by the global business services organization.
- The service offerings themselves are harmonized and end-to-end in nature.



Current Development Stage Of Hungarian Business Services Centers (% of respondents in 2017)

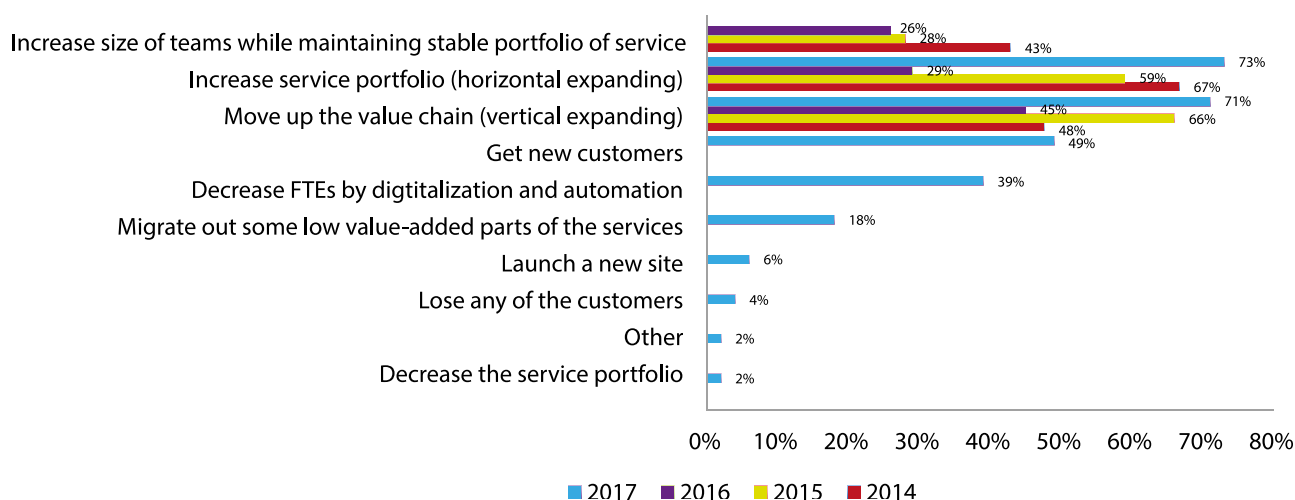


In an evolutionary path of business service providers, the Hungarian Business Services Centers are typically medium matured, only 14% of them are at the beginning and 18% of them are at the end in this journey. The maturity stage is similar to other part of Europe. Based on the SSON European Benchmarking Survey in 2017, 69% of European business centers are matured or have arrived at the stage of front curve maturity. Based on our survey, 42% of services provided by the Hungarian business services centers are analytical, higher value-added. Some years ago it was the minority in the market but nowadays it is strengthening and getting closer to be the majority. According to SSON European Benchmarking Survey in 2017, the transition from transactional work toward more knowledge-based work is strengthening with the maturity of business centers. 75% of SSON survey respondents with a fully implemented GBS model incorporated at least 50% knowledge-based work in their service portfolio.

Factors Influenced By The Development Outlook Of Responding Companies

The expansion is planned to come primarily from increasing the size of teams and from providing higher value-added services (45% of participants). We can also see the growing importance of digitalization and automation and, as a consequence, the decrease in FTEs and the migration of some low value-added processes.

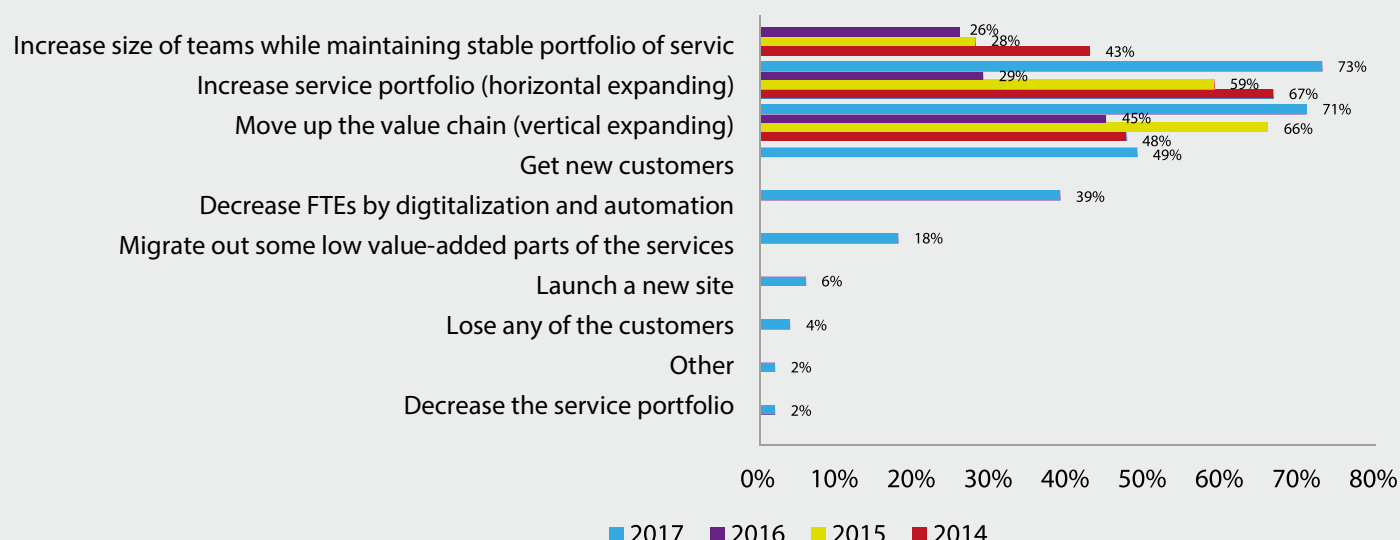
Factors Influenced by the Development Outlook of Responding Companies



Competitiveness Factors

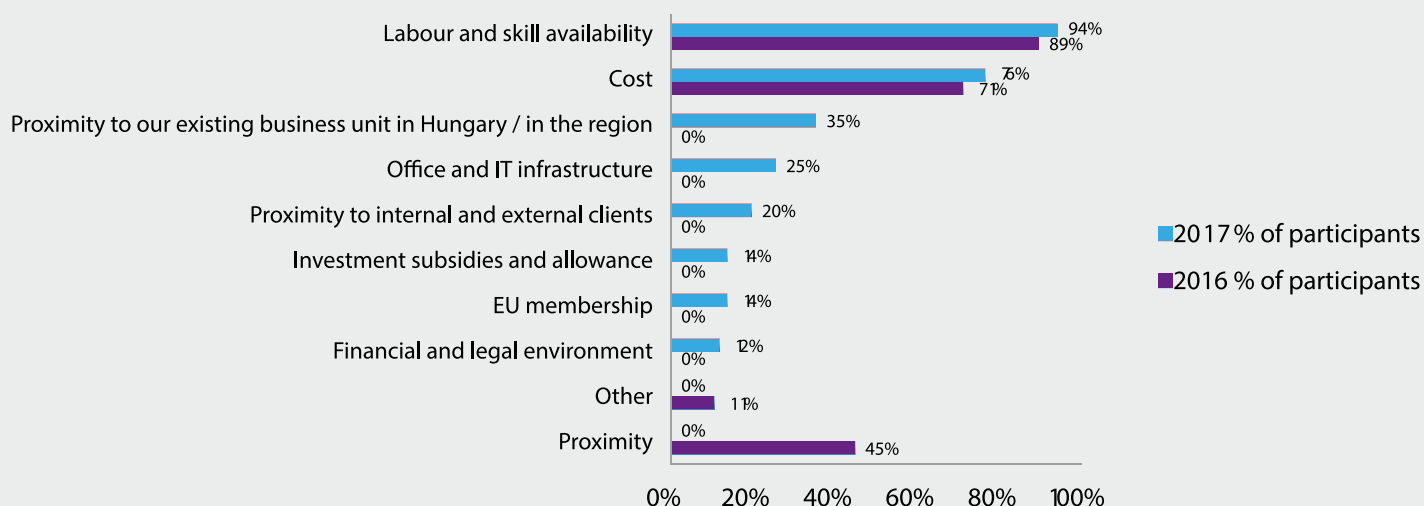
Country advantages and competitiveness factors have also been examined in the survey. The participants identified five major risks, ranked in the following order: labor arbitrage, labor availability, language capability, skill availability and country stability.

Factors Influenced By The Development Outlook Of Responding Companies



Selection Criteria When Selecting Hungary As A Business Services Center Location

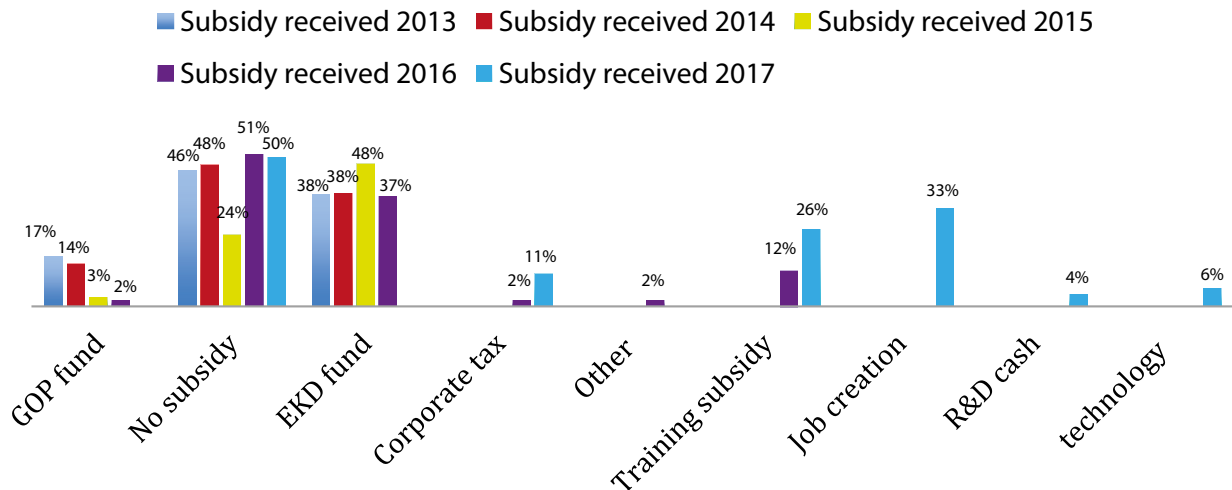
Selection Criteria When Selecting Hungary as a Business Services Center Location



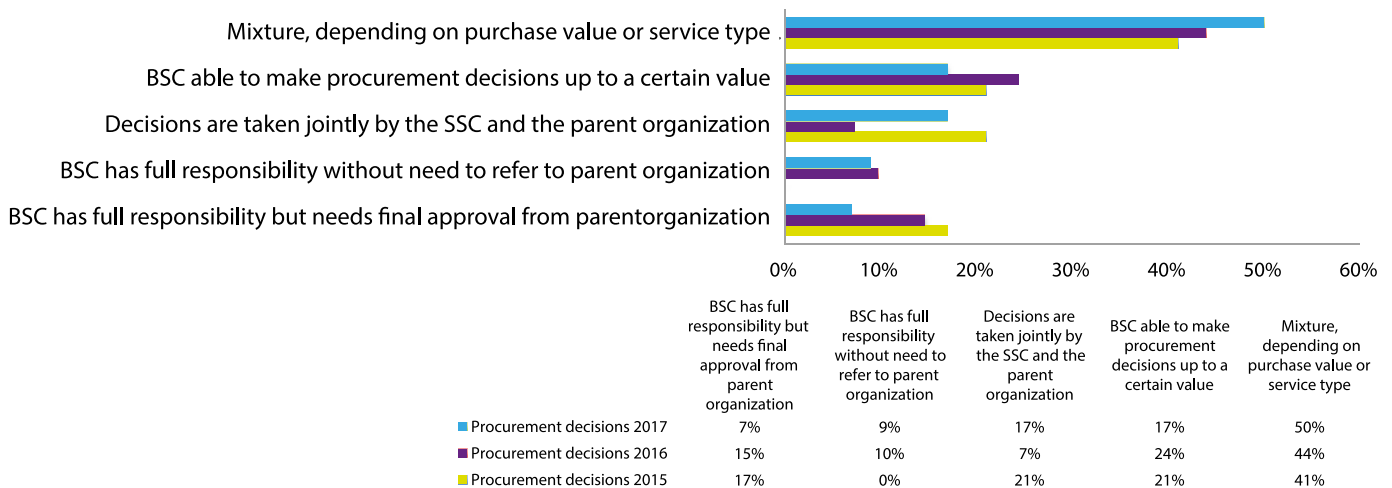
Industry Subsidies

With regard to subsidies, 50% of the participants did not take any subsidies, which is a similar ratio to the 51% of 2016. EKD and GOP funds utilization disappeared, but some additional elements such as the training subsidy, job creation subsidy, corporate tax allowances and technology-intensive investment support have grown as separate elements.

Receipt Of Industry Subsidies By Participant Companies (% of responses)

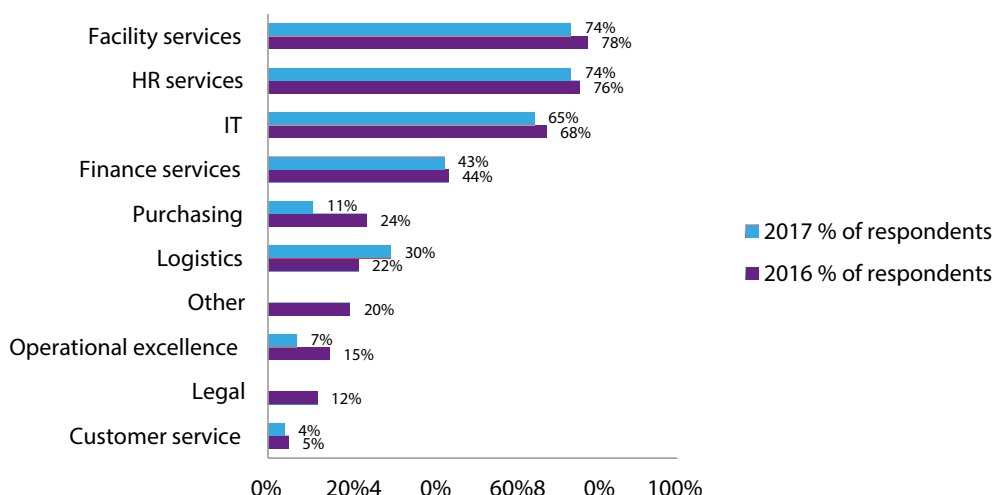


The Practice Of Procurement Decisions



Services Purchased From Hungarian Suppliers

Procurement Of Services From Hungarian Companies By Participating Companies

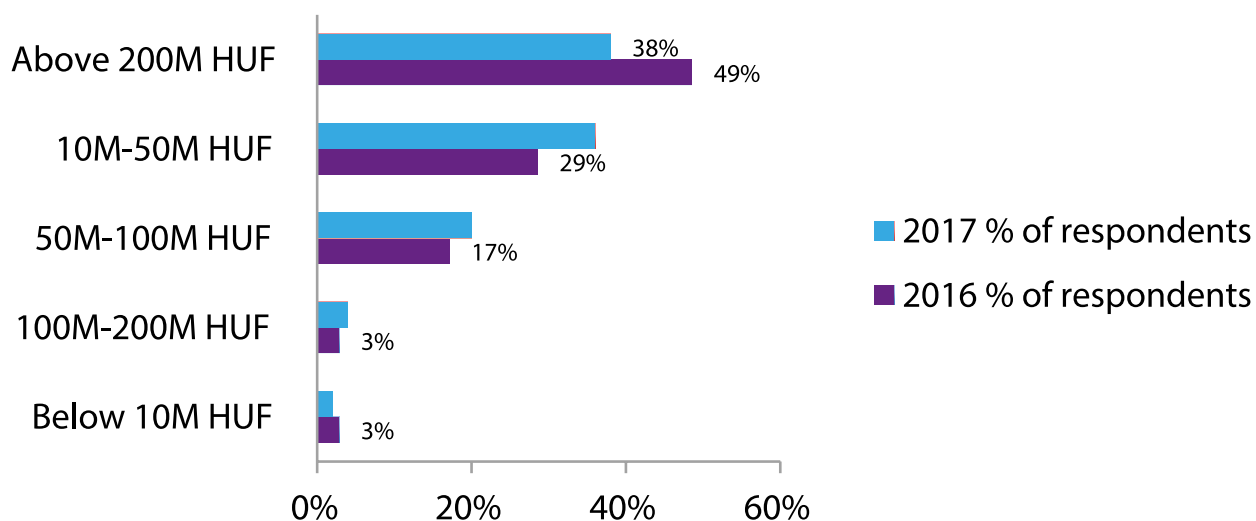


91% of the participants use Hungarian suppliers. The formulation of the question has been refined throughout the years to receive more relevant answers. The most common services BSCs use Hungarian suppliers for are Facility Services, HR, IT, Finance Services and Logistics. We can observe a significant increase in the share of Logistics Services (+8%), Operational Excellence (+8%) and a large decrease (-13%) in Purchasing compared to 2016.

Expenditure At Hungarian Suppliers

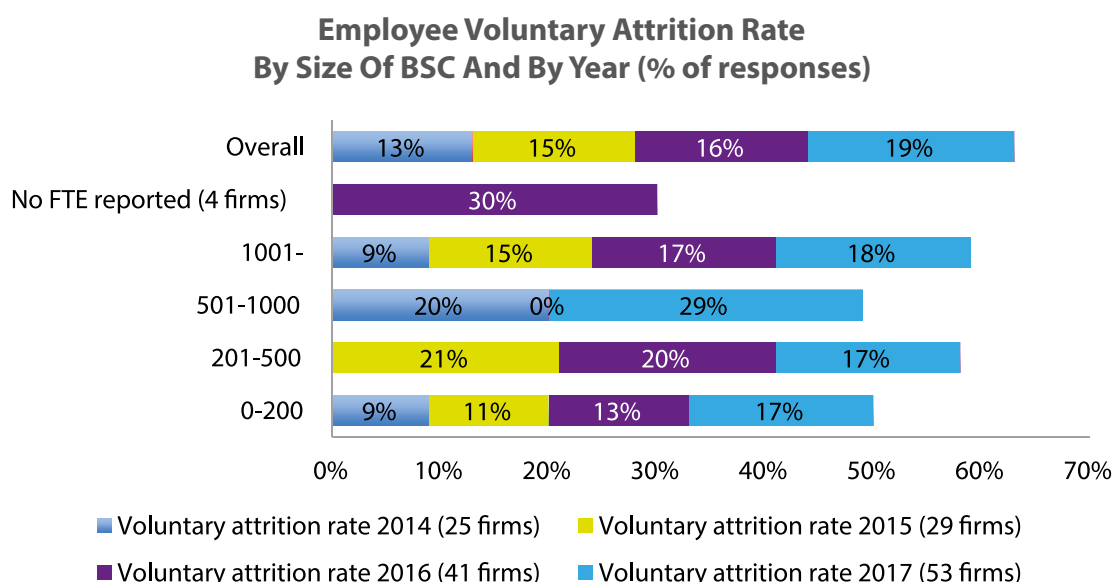
In terms of spending, 38% of respondents (17 firms) spend more than 200 million HUF per year. By estimating average spending in all categories, the responding firms spend more than 5 billion HUF yearly on Hungarian suppliers.

Spend Ratio On Hungarian Suppliers
By Survey Participant Companies (% of responses)



Attrition Rate

The average voluntary attrition rate is 19% in 2017 amongst the participating companies and this means a slight increase compared to the data from 2014, 2015 and 2016. Although, the trend is clearly increasing, the attrition rate increased to 18% in the 1000+ FTE category. The attrition rate of the small size Business Services Centers has been increasing to 17% since 2016 (13%). The highest rate can be observed in the centers employing 501-1000 employees (29%). We consider that the average attrition rate could be decreased with appropriate HR methods especially if we compare it with the European SSON Benchmarking Survey in 2017 data that show 11% average annual attrition rate.



Employee Engagement

56% of the organizations use a churn prediction system and 78% of participants utilize engagement surveys in their people processes. The average score of 73% is a slight increase compared to the scores from 2014, 2015 and 2016.

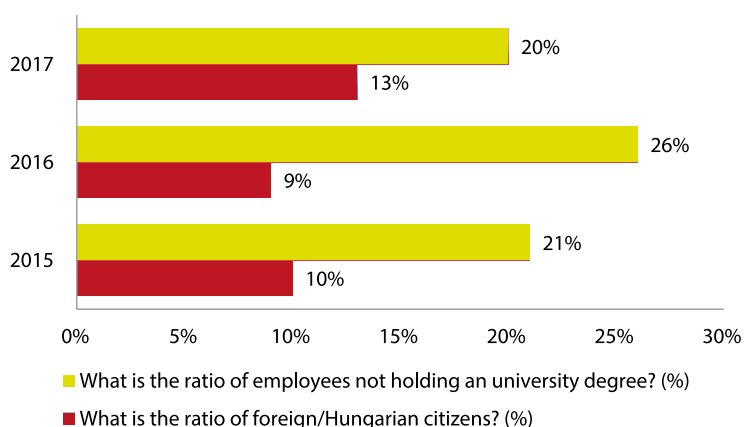
Average Span of Control at Responding Companies

The average span of control, i.e. the hierarchy levels at BSCs in Hungary: 12

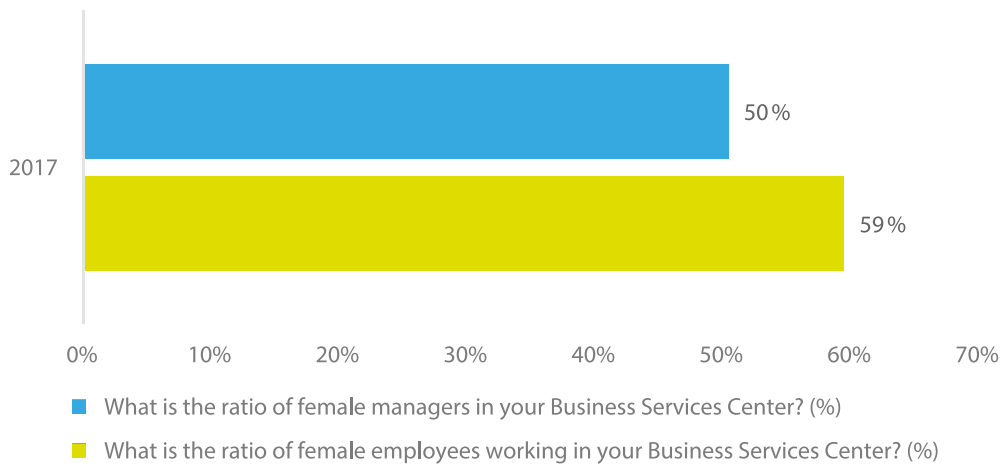
Employee Characteristics

We have analyzed the workforce from many perspectives. Language skills have already been covered in previous sections of the survey. As the skilled and language speaking workforce is getting more and more difficult to recruit, alternative channels are now being examined by centers. Recruiting from abroad has always been an option; the foreign citizen ratio has grown to 13% from last year's average (9%) in Business Services Centers. Because of labor availability challenges experienced on the market, the results state that business services centers turned to educational institutions to try to recruit more employees with university degree. The ratio of employees without university degree has decreased from 2016, from 26% to 20% in 2017. Although the answers provided to these questions were diverse in some cases, the average ratio of women working in the industry is 59% which is a high result. The average ratio of women filling in management positions is around 50% which shows that the gender distribution of leadership roles are balanced out.

Education & Foreign Citizen Analysis Of Participating Companies' BSCs



Positions Fulfilled By Female Employees



Based on the answers of 42 companies, less than 1% (0,82%) of all employees are living with any kind of disabilities at BSCs. Considering the fact that most employment roles in a BSC do not require such physical skills that handicapped persons or ones with disabilities could not fulfill, the ratio is surprisingly low. Employment would be beneficial for both parties as there are several possibilities to reduce costs and to obtain tax relief. A possible cause of this result could be the lack of barrier-free and accessible office buildings within the industry.

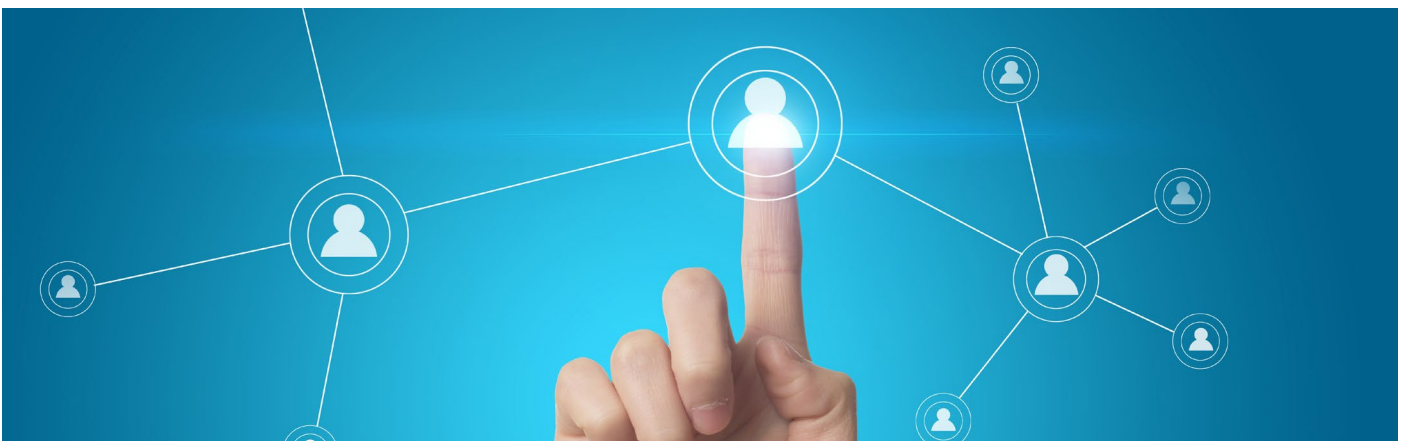


Education Support

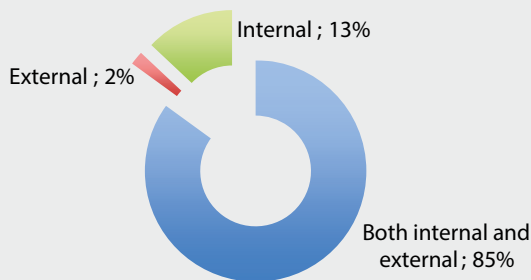
79% of the responding companies provide education support to their employees in order to increase their preparedness for their jobs and for the newly transferred higher value-added activities and to set a clear career route for them. 75% of the organizations have a standard career routes and 59% of them use the Hay method for the matter. 10% use Towers Wattson method and 31% found alternative solutions. 10% of the companies have a self-developed system.

The training and education programs offered by the responding firms involve internal and external programs. 85% of the companies provide both, while there are companies that only offer internal or external training or education possibilities.

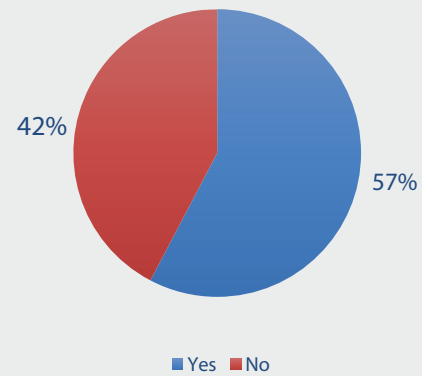
The number of average training days per person per year in the Hungarian BSCs is 12 days.



Types Of Training/Educational Programs Provided By BSCs

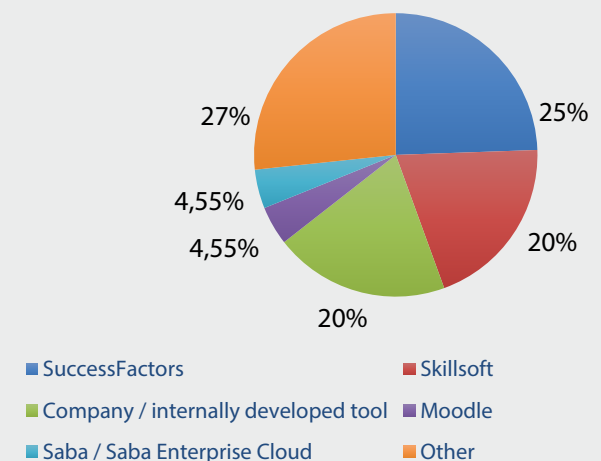


Do You Support Trainings As A Benefit (in case of skills not related to the job)?

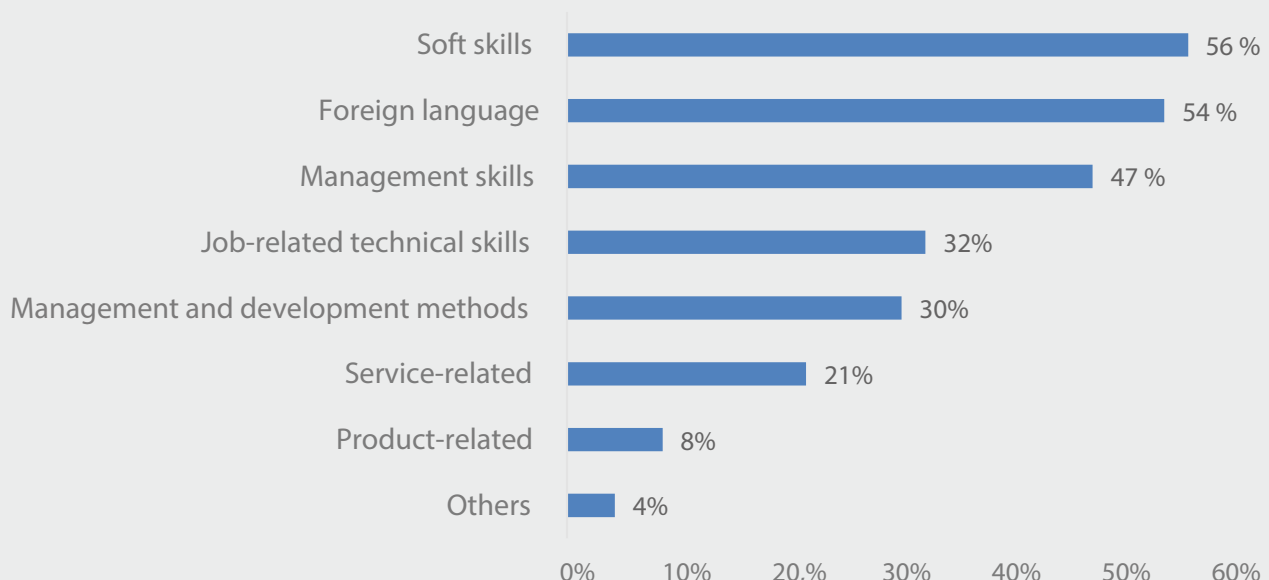


As the greatest challenge of recruiting within the industry is to find the potential employees with the right mixture of skills, companies support a great deal of trainings – even such trainings that are not in close relation with the job. 46 companies have external partners who are providing education to BSC employees. These trainings mainly target soft skills (56%) or foreign languages (54%). Furthermore, a high percentage of trainings of management skills and job related technical skills are also provided by external partners. Based on the SSON European Benchmarking Survey in 2017, 51% of respondent business centers also found as the biggest challenge to recruit up-skill talent for higher value services. After recruiting, they found further HR challenges as managing/reducing attrition (19%), reconfiguring the workforce after digital transformation (19%) and engaging different generations in their workforce (11%). Based on the SSON HR Shared Service Landscape survey published in September 2017, 57% of business centers use an internal recruiting team, 20% of them apply recruitment BPO and 23% of them use headhunting firms. In Europe, the key skills that centers are looking for are leadership (19%), problem-solving ability (16%), relationship-management (16%), communication (14%), data-analysis (11%), functional process expertise (7%) and language (5%).

Usage Of E-learning Platforms



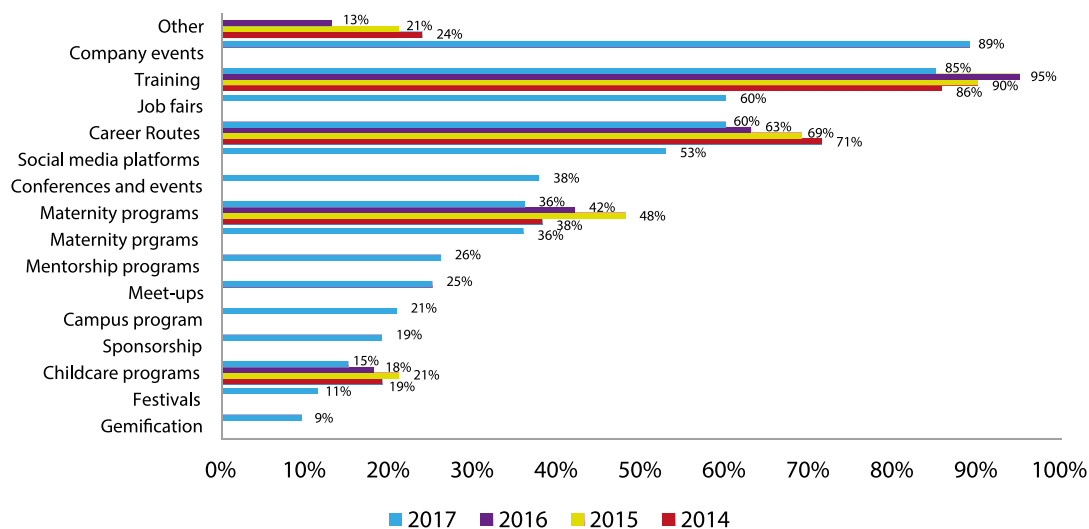
Field Of Educational / Training Programmes Provided By External Partners To BSCs



Employer Branding

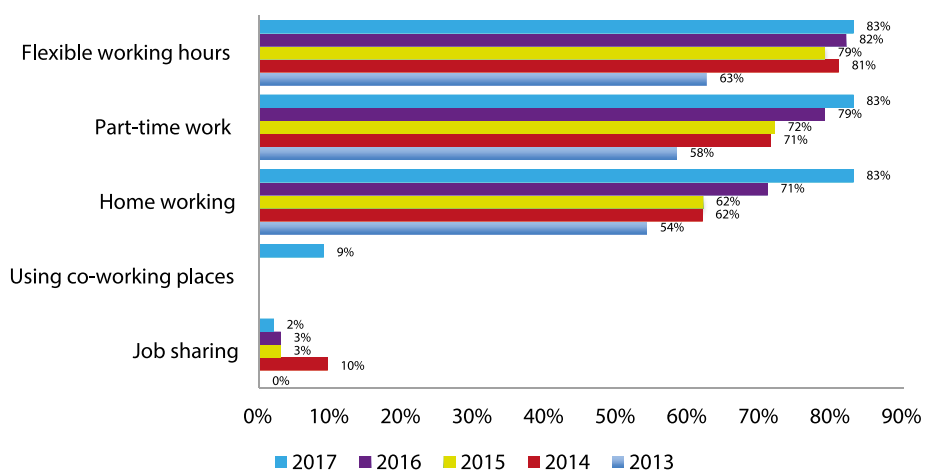
The participating company and the sector itself have realized during the last few years, that employer-branding activities must be put in the forefront in order to keep their employees or to attract new potential colleagues from the younger generations. Company events have become more important with an 89% share among the employer branding options. 95% of participating companies are using some kind of branding programs to support motivation and are aiming to be seen as socially responsible employers; this means a 10% decrease compared to last year. The following tools are among those being used: sports, company events, language courses, talent programs, CSR, health and safety, environmental initiatives, community buildings and cultural activities. 85% of the companies provide training opportunities that now involve gamification as a new element with a 9% share. At the same time, we can observe that new kinds of employer-branding activities are performed with the aim of targeting future employees in order to fill the gap of the labor market. These are: increased use of social media platforms, mentorship programs, meet-ups, campus programs and festivals. Based on the SSON HR Shared Service Landscape survey published in September 2017, in European business centers, after up-skilling existing staff, the second biggest HR challenge with its 16% is to sell business services as career path.

**Employer Branding Tools Deployed
By Participating Companies' BSCs**



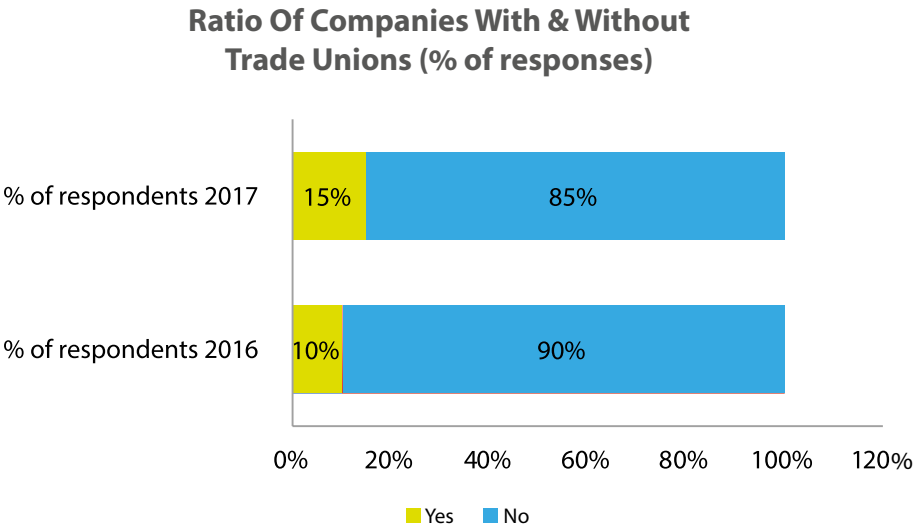
As part of the corporate branding programs, many companies have implemented flexible employment options. Home working, part-time work and flexible working hours continued increasing in 2017, with companies offering home working up to 83% from 71% of 2016. More than 80% of the participating companies utilize flexible working hours, which is the same level as last year. Companies have commented that utilizing home working and part-time work assists them in office space optimization. Employment of parents with young children or employees with disabilities is another area of focus for some companies. The share of job sharing has decreased since last year, but we can see the growing importance of the use of co-working places (9%).

**Flexible Working Arrangements Operating
At Participating Companies' BSCs**



Trade Unions

15% of the companies have trade unions. Last year the figure was 10%, therefore we can state that there has been a 50 % increase in this regard. The change can also be attributed to the fact that this year the number of responding companies increased by 35% - from 41 to 55.

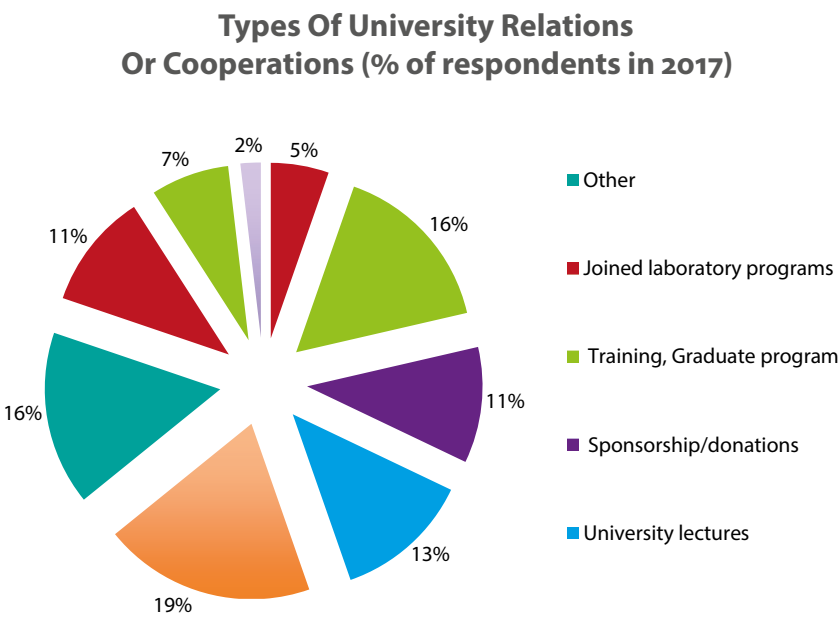


Salary Increase

In terms of salary increase, a slight increase can be observed in 2017 (4.4%) compared to the levels in the past 3 years that meant 3% over the period

University Relations

As the recruitment of the skilled and language speaking workforce is time consuming (on average 49 days), and due to the fact that more and more business services centers are entering the market and existing centers are expanding, companies start their actual recruitment process already at universities by utilizing numerous type of relationships and channels. 59% of participants have active university relations, which is a 9% increase since 2016. The most typical channels are having dedicated lectures, running graduate or specified training programs, having company open days, sponsorships or laboratory programs with selected universities.

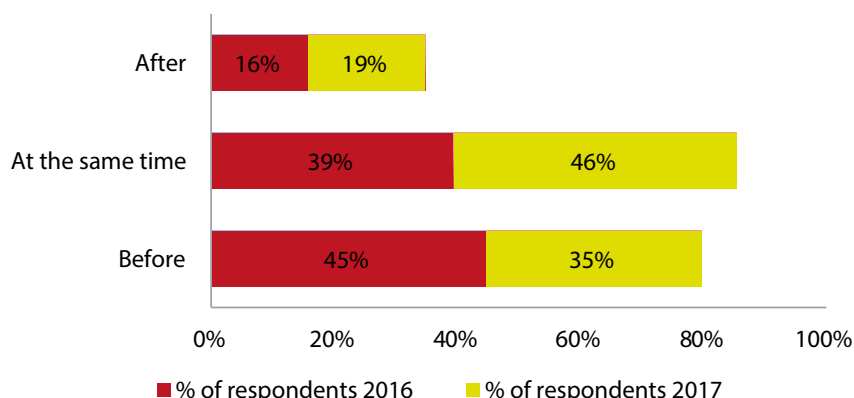


Technology

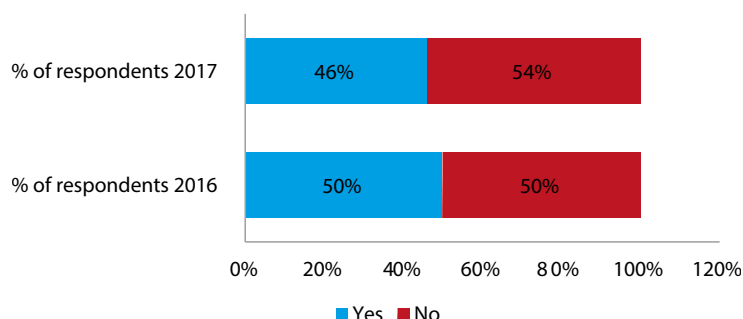
Gaining efficiency from business or shared services is influenced by the optimization of the underlying technology. In order to be able to realize BSC benefits, 81% of organizations participating in the survey transformed their technology backbone prior to or at the same time as they moved processes into a business services center. In 2017, due to the fact that companies increased their processes (and due to the introduction of RPA and automation solutions), the share of simultaneous technology upgrades has increased from 39% to 46%.

Administrative processes are technology-dependent and, despite the fact that a significant proportion of the benefits that can be gained from process centralization arises from using integrated ERP solutions, 54% of participants companies still do not use one single ERP instance in all countries. This is an increase compared to 2016 (but can also be attributed that the sample – the responding companies – has increased by 35%).

Ratio Of Moving Processes During Or After Technology Change



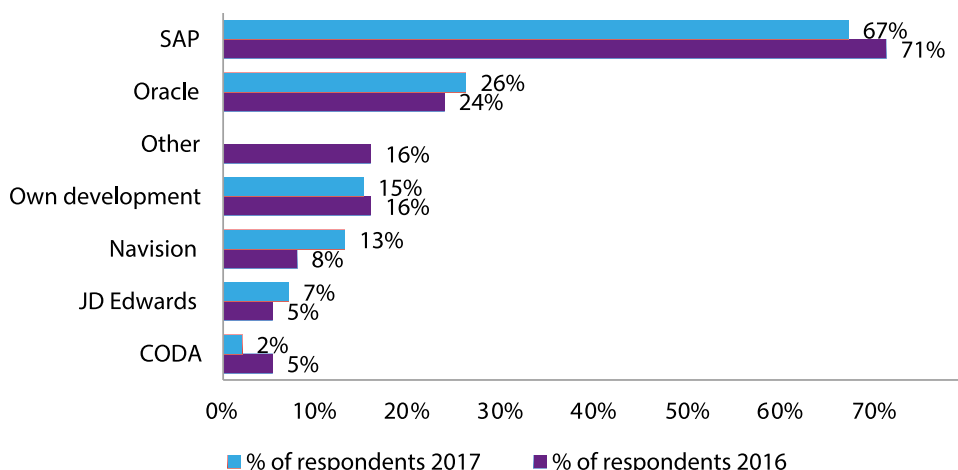
All Major Steps Of E2E Processes Managed By One ERP System In All Countries (% of responses)



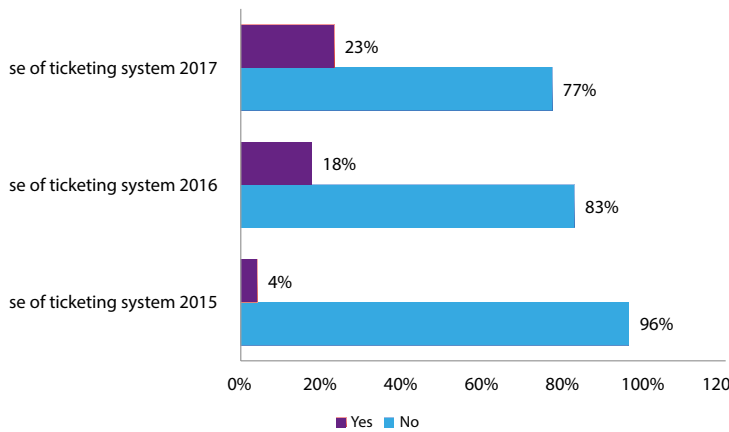
26% (24% in 2016) of the participants are using Oracle and 67% SAP (71 in 2016), with other systems such as Navision (increased by 5% compared to 2016), JD Edwards, CODA being used in other companies. Own developments still make up 15%.

77% of participants reported the use of a ticketing system to manage queries (which is a significant change compared to previous years, but this can be attributed to the significant growth of the sample of companies analyzed) and the most commonly used systems are Remedy and Service. Nearly 50% of participants have invested in the development of an in-house solution. Many Business Services Centers use several ticketing systems in parallel in order to serve the different clients.

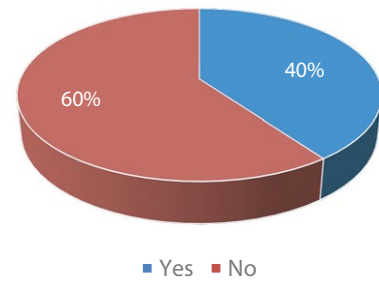
ERP Systems Used By Participating Companies (% of responses)



Deployment & Use Of Ticketing Systems (% of responses)

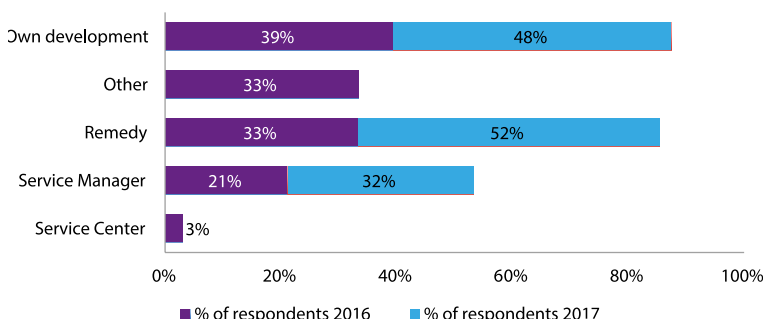


Usage Of Any Automation Technologies For Service Processes (% Of Respondents In 2017)

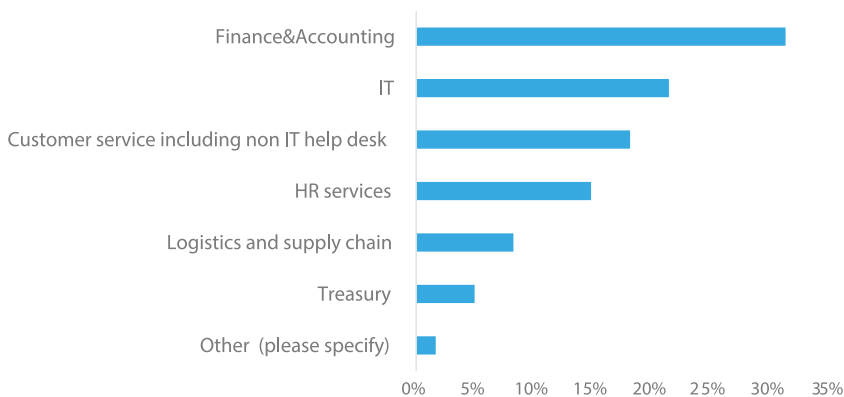


According to our survey, 40% of the responding companies use some kind of automation technologies for service processes. The most favored service areas for automation are F&A, IT, customer services, HR, logistics and supply chain, and treasury.

Ticketing Systems Used By Participating Companies BSCs (% of responses)



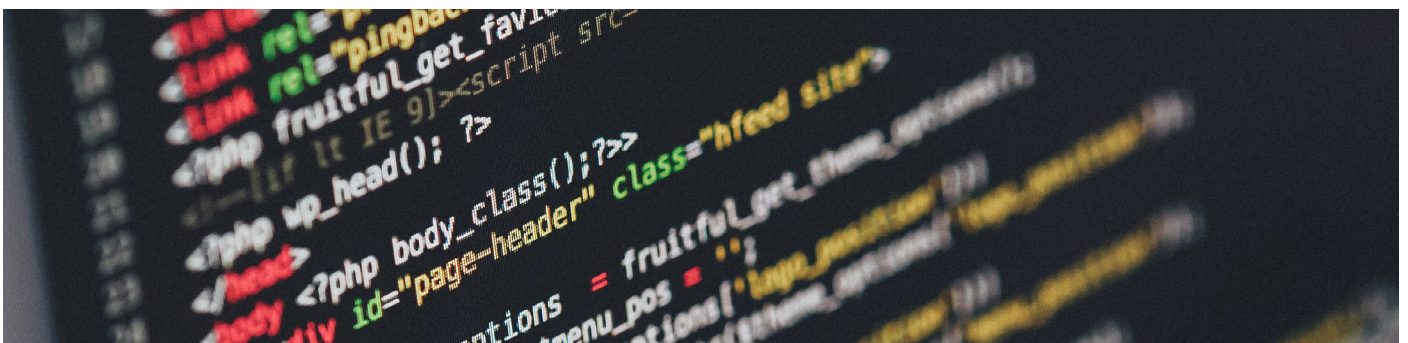
Service Areas With Automation Technologies (% Of Respondents In 2017)



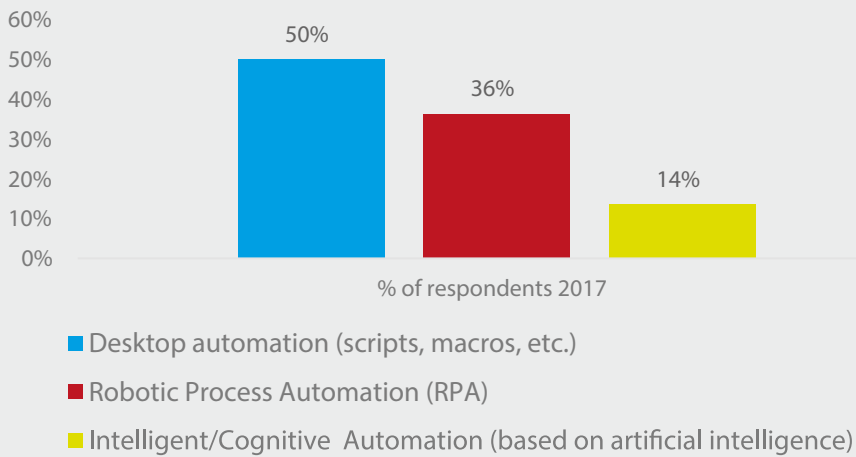
Based on the SSON Intelligent Automation Universe survey data in Q3 2017, the most popular functions for automation are typically the same, but the ratios are different. The SSON survey shows 50% for F&A, 16% for customer services, 9% for HR, 2% for SCM and 1% for IT globally. The most frequent process types used with automation technologies are accounts payable, order processing, recruitment and HR processes, supplier processing, auto translation, business intelligence, OCR, front office communi-

cation. Based on SSON Intelligent Automation Universe survey data in Q3 2017, the most popular service processes for automation are R2R (23%), P2P (18%), O2C (14%) and H2R (9%).

67% of those respondents, who do not use automation technologies yet, are planning to implement it. 33% of them plan the implementation within 1 year, the other 67% within 2 years.



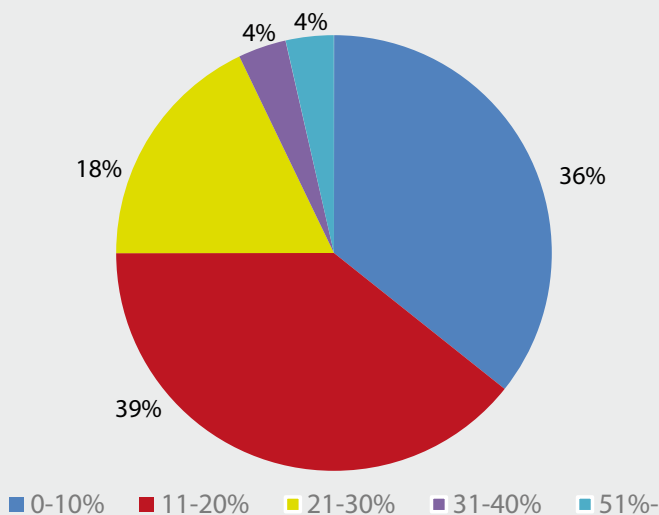
Usage Of Automation Technologies In 2017



Based on the SSON Intelligent Automation Universe survey data in Q3 2017, 35% of BPOs and 22% of SSCs did implementation of intelligent automation technologies globally. The top countries in implementation projects are United States (21%), India (20%) and United Kingdom (11%). These countries seem to try to build up their technological competitive edge in automation technologies that could be a challenge for the Hungarian market players as well.

Desktop automation technologies are the most wide-spread with their 50% in the Hungarian market, but Robotic Process Automation has also significant ratio with its 36% at the service centers. Based on the SSON European Benchmarking Analysis in 2017, 48% of the centers have already implemented or are in pilot phase with Intelligent Automation.

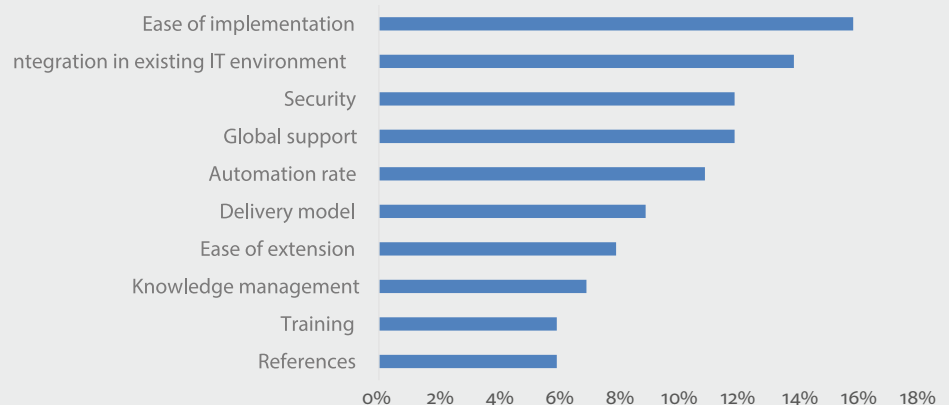
Expecting Ratio Of Cost Saving In 2 Years Time Scale (% Of Respondents In 2017)



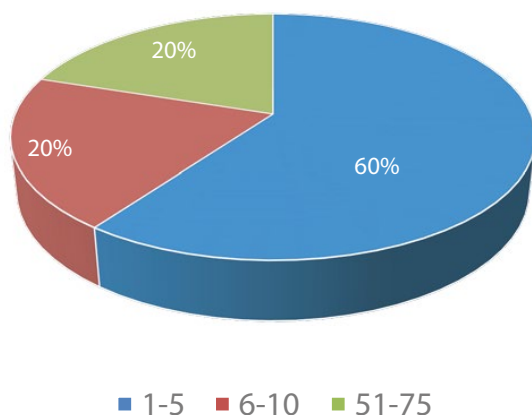
39% of the respondents are expecting 11-20% cost saving within 2 years using automation technologies.

43% of the participating companies use BPM vendor or consulting firms in implementation phase. During selection of automation vendor, the most important five criteria are the ease of implementation (16%), the IT integration (14%), security (12%), global support (12%), automation rate (11%). Based on SSON RPA in Shared Services 2016 research, in 50% of respondent business centers the most popular option in RPA implementation is utilizing RPA software and building in-house RPA expertise.

Selecting Criteria For Automation Technology Vendor (% Of Respondents In 2017)



Number Of Used RPA Bots (% Of Respondents In 2017)



Robotic Process Automation is before its breakthrough, 60% of those who use the technology implemented 1-5 bots and 1-5 bots are under development at 75% of them. These data are similar what SSON RPA in Shared Services research showed in 2016. Based on SSON analytics, 88% of centers have less than 10 RPA bots in place. Using RPA, 40% of the respondents focus on 3-5 processes, other 20% of them focus on 6-10 processes, and other 20% of them 11-20 processes. 50% of these companies expect to replace 1,5-2 FTE with one bot in average, other 20% of them plan with 2,5-3,5 FTE. 90% of the companies expect ROI within 101-300% in the first year. 80% of them use cloud RPA solutions (40% own server, 40% outsourcing provider), 20% of them desktop-automation technologies.

Definitions Of Automation Solutions:

DESKTOP-BASED AUTOMATION

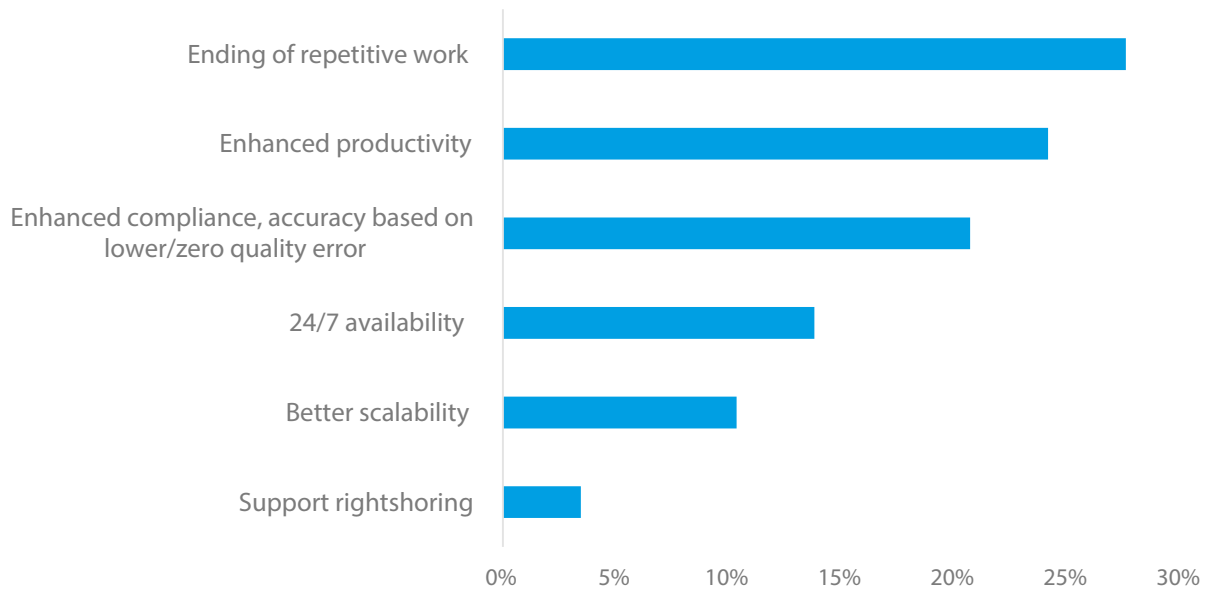
- Software is designed to help user interface on desktop, replaces the individual workstation, and is run on individual desktops.
- Software can be run on a PC/desktop while also using the PC/desktop to perform other regular tasks simultaneously.
- Software is often referred to as “Attended RPA” where it requires human interaction in order to initiate a task, as well as to continue the process.
- Software is often used to automate multiple small micro-tasks within a larger end-to-end process.

SERVER-BASED AUTOMATION

- Software is written and designed in a data center to execute the task autonomously without human interaction i.e. the software, the process and the robot are run only on a server.
- Human interaction is not required, as this is an “Unattended RPA”.
- Often there are trigger-based rules, which initiate the RPA.
- When the software is being run on a desktop, it consumes the entire PC thus the PC cannot be used to perform other regular tasks simultaneously.
- Software is often used to automate long end-to-end tasks entirely without human interaction.

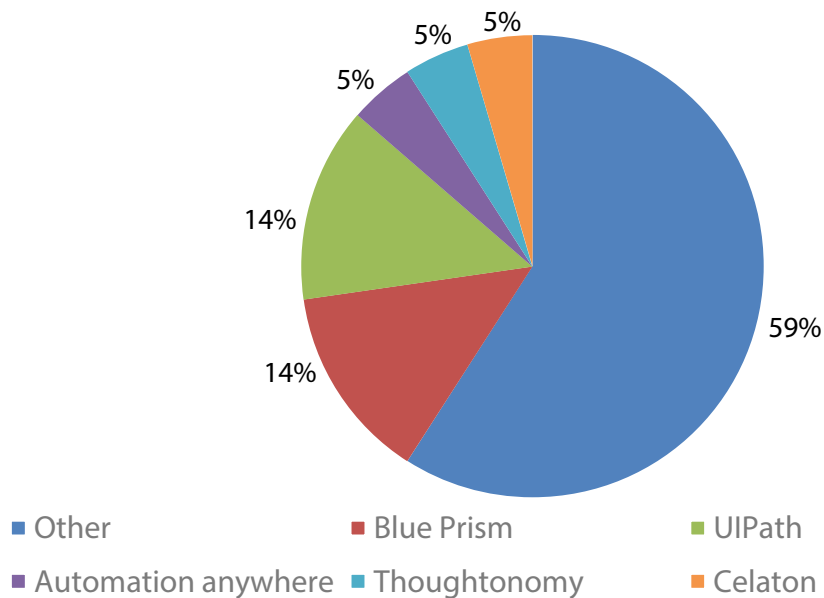


Most Important Effects And Benefits Of RPA (% Of Respondents In 2017)



The most important three effects and benefits of RPA for the business services companies were the ending of repetitive work with its 28%, enhanced productivity with its 24%, enhanced compliance and accuracy with 21%. SSON RPA in Shared Services research in 2016 showed similar ratio with focus more on value-added work (41%), reduce FTE (21%), enhanced productivity (15%), better scalability (9%), integration benefits (6%), and enhanced quality (3%).

Used RPA Software (% Of Respondents In 2017)



Based on the survey, most of the service companies (59%) use own developed RPA technologies. Among the market software, the most favored RPA solution in the Hungarian market are Blue Prism, UiPath, Automation anywhere, Thoughtonomy, Celaton.

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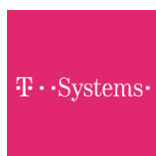


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