



HOA
HUNGARIAN SERVICE
& OUTSOURCING
ASSOCIATION

HOA Annual **Report**

2018_

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HOA Annual Report 2018

Letter from the President

The year of 2018 was an important milestone for the business services sector. This was the year when the individual members of this industry not just realised the need, but started to act as a community. At HOA, our major focus was on encouraging and strengthening these initiatives, and providing appropriate platforms to make things move.

In my personal opinion, our major success is that all significant representatives of this industry have signed a joint Position Paper about the most important issues that, when managed and solved together, can make us even more competitive, not only on regional, but also on global level. This gives a clear entitlement to us on what to represent towards the Government and any other external bodies or stakeholders. Next to this, we are proud that we have re-established our cooperation with HIPA and started co-operation towards the, so-called, Tier 2 cities as well. Within this publication, everyone can find our summary about this year and I hope it brings back the same positive emotions that I am having when reading it. Last but not at least, I thank all the partners, sponsors, and active members and individuals for their support and hard work; and I can promise that we will continue all good and beneficial initiatives that we have started.

Balázs G.Nagy



HOA Board Members in 2018

Balázs G.NAGY
President



Carina CURTIS
Board Members



István KATONA
Vice President



Zsuzsanna GOMBKÖTŐ
Board Member



Péter FAZEKAS
Board Member



Annamária MIKLÓS
Board Member



Zsolt SZMOLINKA
Board Member



László PERÉNYI
Board Member



Judit FORGÁCS
Board Member

HOA Management



Eszter GÁBRIEL
Office Manager



Ákos GERGELY
Board Member



Richard RÁNKI-KOVÁCS
Managing Director

HOA's Vision

HOA, as an association, is the number one professional entity of the business services and outsourcing industry in Hungary and all Hungarian and international large companies and SMEs dealing with outsourcing or business services are proud members of the association. HOA, as the unavoidable professional association of the industry, represents the interests of the sector, supports its members and organises regular programs with the aim of creating a strong community.

HOA's Mission

The mission of HOA is to support our members and the Business Services sector by promoting the successful and high quality business services and outsourcing possibilities, with the use of the application of the development offered by the digital age and by mapping the possibilities of the cooperative work of human resources and automation.

It is also our intent to promote the economic development of the country with the promotion of the above-mentioned activities. HOA is an open and independent professional organisation. Its common organising principle is to participate in the service activities provided to the stakeholders of the national economy and public sector. We act in the interest of the Business Services and Outsourcing Sector and our Members.

To fulfill our mission,
our goal
is to



Our activities in fulfilling our Mission





HOA Strategic Platform

HOA has setup its HOA Strategic Platform, where all BSCs/SSCs (HOA members and non-HOA members) that employ more than 1000 people were invited to become members of the platform.

The first strategic workshop with the participation of the members was held on 27 June 2018. The outcome of the workshop was synthesized in a strategic document and, based on the findings of the workshop, the HOA Position Paper 2018 was formulated. The position paper has been handed over to entities of the Government of Hungary, such as the Prime Minister's office and ministries and institutions like: PM, KKM, ITM, EMMI and HIPA.

The main areas of cooperation and workshop themes were



The HOA Workgroups

The HOA workgroups are the production units of the Association. The workgroups are output-oriented teams of senior professionals coming from the senior and top management of the corresponding governmental institutions and our HOA-members; other business service providing and outsourcing companies and stakeholders have been invited to participate in the joint, productive work.



(HOA_IBWG)

The HOA Industry Branding Workgroup

The HOA Industry Branding Workgroup has been setup with the following targets and objectives

- Strengthen the image and perception of the service and outsourcing industry for all stakeholders, with special regard to the Government of Hungary.
- Become the single and most important unit for defining and positioning the business services and outsourcing industry.
- Create the statistical classification and database for the business services industry at national level and promote the results to international statistical entities via co-operation with the Hungarian Central Statistical Office (KSH)
- The outputs of the workgroup should be critical information to the government and essential know-how for the market.
- Define initiatives on how our sector can support the competitiveness of Hungary on the long term.
- Provide essential information to potential future talents in mid- and high-level education about the career possibilities in the business services and outsourcing industry.

(HOA_EDUWG)

HOA Education Workgroup

The HOA Education Workgroup is an authentic professional body that integrates several industry stakeholders interested in the development of educational programs. The vision of the workgroup members is to build up a professional educational portfolio in cooperation with universities, vocational schools, training organisations and industry players that meet the needs and help the sector in further growth.

The main targets and objectives of the workgroup are

- Define the educational needs and criteria of the business services and outsourcing industry
- Become an advisory board for talent management initiatives by the Government and the industry players
- Start and support direct programs/projects with the purpose of supporting the business services and outsourcing industry to access appropriate talents and develop their actual talents to move up the value chain.
- Improve the availability of trained workforce for the business services and outsourcing industry by developing and implementing tailor-made mid- and high-level education curricula.

(HOA_RPAWG)

HOA RPA/Automation Workgroup

The HOA RPA/Automation Workgroup has been created to prepare the Hungarian business services sector to the significant changes triggered by the spreading use of RPA, Smart Process Automation and other Automation solutions and their implications on the national economy and workforce. At the same time, it is a strategic objective of the workgroup to provide support to make Hungary a regional innovation hub for Intelligent and Smart Automation and RPA solutions and other highly developed Automation solutions.

The main targets and objectives of the workgroup are

Prepare the Hungarian business services sector to those significant changes and to the effects on the economy and on the labor market that automation and robotics will bring

Support the development of Hungary to become a regional automation knowledge hub

Share domestic and international experiences among HOA members

Develop a common innovation platform

Make possible the drawdown of EU support sources domestically, lobbying for the implementation of Hungarian tendering

Share methods and techniques to ease the aversion of workforce and partners, and to create support from the workforce regarding robotics and artificial intelligence



Business Services Conference Day



Awards Ceremony

&



HOA, in cooperation with HIPA, organised the first Business Services Conference and Awards Ceremony Gala in 2018 with the participation of more than 120 attendees from our member companies and professional partners



Three BSC Excellence Awards were granted:

1. Center of the Year – Morgan Stanley
2. Education Cooperation and Talent Management – BT
3. Manager of the Year – Prabal Datta – TCS

HOA iPAC 2018 Intelligent Process Automation Conference

The 1st Hungarian Intelligent Process Automation Conference / iPAC 2018 was organised on 7 November 2018 at Hotel Corinthia Budapest.

HOA – Hungarian Service and Outsourcing Association and its HOA RPA/Automation Workgroup were event owners and professional partners in organising this successful conference, first of its kind in Hungary.

The event provided the best opportunity for Business Services units (BSCs/SSCs/CoEs) and international executives to gather in order to become acquainted with the latest trends and solutions they must have in order to keep their businesses innovative and truly distinguished on the market.



The event was sponsored by



HOA Events

Knowledge Sharing

HOA is organising its regular events in order to build a strong community with our member companies and their staff from all levels. Apart from the bringing closer the business services community, another important objective is to disperse and channel the latest professional knowledge to our members and invite well-known professionals, politicians and opinion leaders to support the decision making and operations of the companies of the HOA Community.

HOA Executive Club

The HOA Executive Club business breakfasts are organised, with the support of DOQSYS Business Solutions as sponsor for the top managers of our member companies with the aim of providing elegant but still intimate conditions for an exclusive event, where the number one decision makers can come together and discuss strategic, high level, international and Hungary-related themes and topics that help them in their strategic management activities and can share their ideas, practices and approaches with their fellow leaders. The invited speakers come from international experts, decision makers from the government and government institutions, opinion leaders.

In 2018, the HOA Executive Club was the main forum for the members of the Hungarian business services community to sign the HOA Position Paper 2018 document.



The HOA Executive Club events are sponsored by





HOA Community Meeting EXTRA

The knowledge sharing event organised by HOA where Hungarian cities have the opportunity to introduce themselves in terms of vision, economic strategy, attraction programs for businesses (with special regard to BSCs/BPOs), office infrastructure, development outlook and plans, universities and future available talent.

The cities are represented by the mayors/vice-mayors, university deans, city development companies/holdings, top managers from companies with existing centres in the city.

In 2018, Debrecen and Szeged were introduced at the HOA Community Meeting EXTRA events.

HOA Community Meeting

The knowledge sharing event organised by HOA where information on the latest knowledge, trends, achievements and professional information is provided to all levels of the employees of our member companies.

The events are organised with one theme in focus and presentations of corresponding topics from professionals, company experts or invited guest lecturers are provided to the attendees. The HOA Community Meeting events are hosted by our member companies in order to bring closer the entire community.

In 2018, the HOA Community Meeting programs were co-organised with our following members and partners: DOQSYS, IDBC, EY, ACCEE.





HOA Community
Building Event

HOA-CPL Spring Shuffle Carnival 2018

The Real Business Services Party!

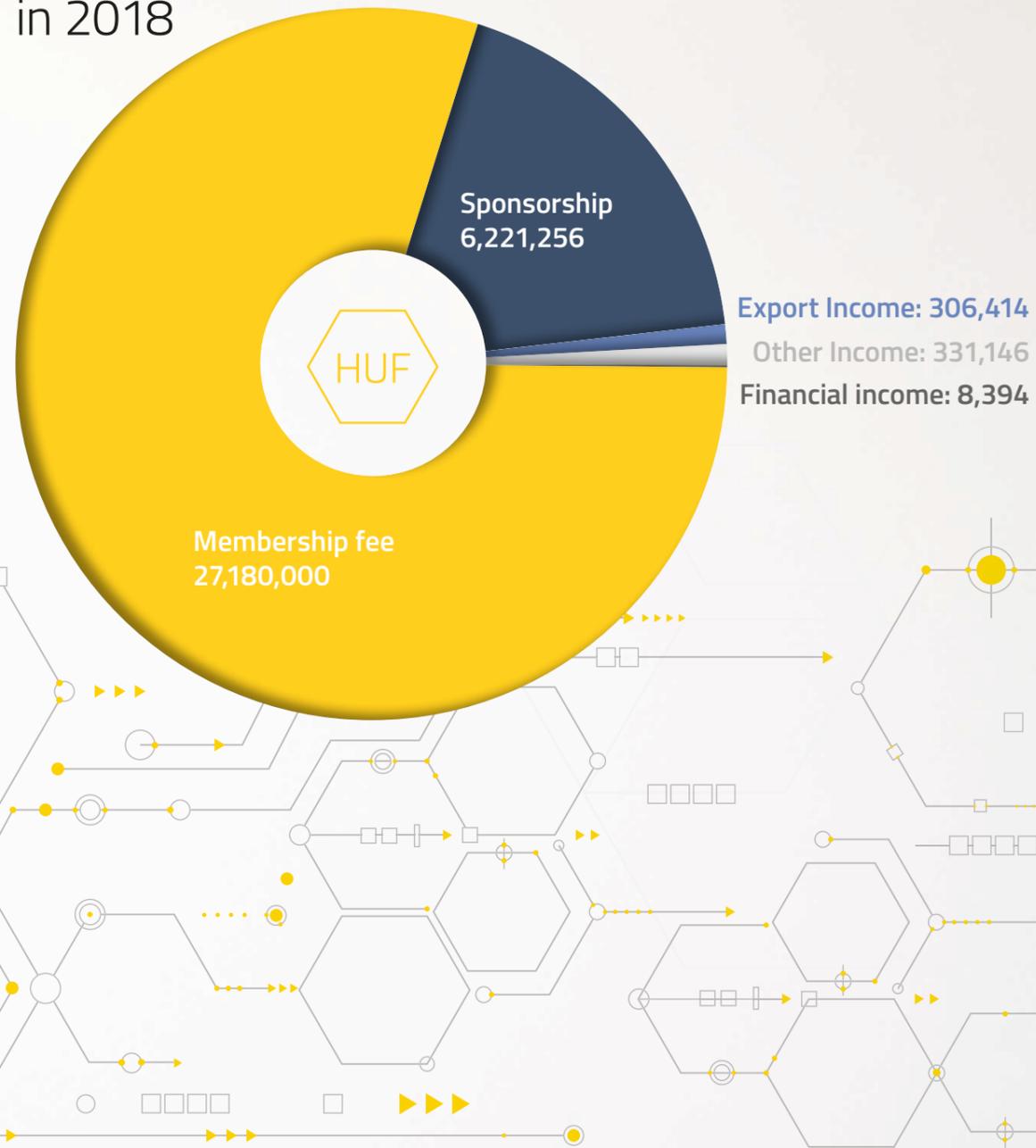
HOA and our member company CPL Jobs, as main sponsor, organised jointly this exciting event in March 2018: a fancy dress/costume party with concerts, great fun and networking!

The event was the first of its kind in the history of HOA and the Hungarian business services sector.

Other sponsors
of the event were



HOA's Income Structure in 2018



HOA's Income Statement in 2018 (HUF)

| | |
|----------------------------------|------------|
| Domestic Income | 33 401 256 |
| Export Income | 306 414 |
| Net Income | 33 707 670 |
| Other Income | 331 146 |
| Material Costs | 76 095 |
| Contracted Services | 12 797 661 |
| Other Services | 261 583 |
| Total Material Expenses | 13 135 340 |
| Salaries | 11 697 904 |
| Other Personal Expenses | 5 715 102 |
| Salary Contributions | 2 355 298 |
| Total Personal Expenses | 19 768 304 |
| Depreciation | 88 378 |
| Other Expenses | 1 958 355 |
| OPERATING PROFIT | -911 561 |
| Income From Investments | 105 |
| Other Financial Income | 8 289 |
| Total Financial Income | 8 394 |
| Other Financial Expenses | 30 335 |
| Financial Expenses | 30 335 |
| PROFIT FROM FINANCIAL ACTIVITIES | 21 942 |
| EARNINGS BEFORE TAXES | -933 502 |
| Taxes | 0 |
| NET PROFIT | -933 502 |



HOA Strategic Partners and Cooperations

We are constantly working on building strategic relationships with prestigious institutions and companies from all sectors and activities in Hungary and at international level, in order to strengthen the Hungarian business services sector and to provide more to our Community.



HOA Patron Members in 2018

We are honoured and we thank our members who consider our activities and achievements worth supporting with additional resources!



Become an HOA Member in 2019

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HOA had **94 members** in December 2018



