

# Welcome/willkommen/bienvenue/benvenuti

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# The Agenda

- Welcome & introduction
- Overview Serbia / Belgrade
  - Country details
  - Market analysis
  - Success stories
  - Labour market
  - Benchmarking
- Rhein Solutions
  - Our services
  - Scalability
  - HR processes
  - References
- Open discussion



# Introduction

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**Mr. Roland Mayer**

Managing Director and Co-owner of Rhein Solutions

- 35 years of experience in managing PS and technology services operations in Europe
- Director of WCS operations, Central Europe during the 90's
- NCR Area General Manager CS Central Europe (D, A, CH), Member of the German Board of Management 2005-2015



**Mr. Lars Hopmans**

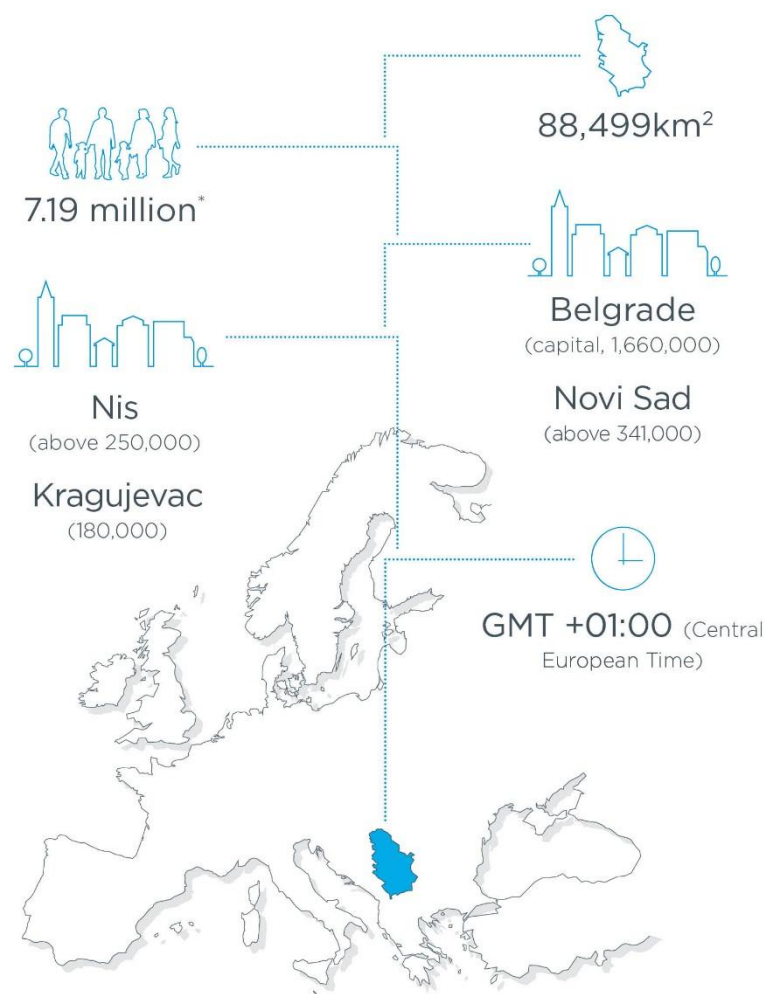
Office Manager

- Experienced Project Coordinator for 1st level support operating in 9 European countries and 7 languages
- Successful implementation of Back Office team with ticket system for 120+ employees
- Creation of several training programs



# Serbia

**Serbia is a candidate country for EU accession.**



\* Data does not include Kosovo and Metohija

It is easily accessible, connected with daily flights to all major European cities/transportation hubs

*Getting to Serbia is easier than ever!*



Frequency of direct flights to/from Belgrade			
<i>Berlin</i>	2/3 flights daily	<i>Amsterdam</i>	2 flights daily
<i>Dortmund</i>	4 days weekly	<i>London</i>	Daily
<i>Düsseldorf</i>	3 flights daily	<i>Moscow</i>	5 flights daily
<i>Frankfurt</i>	5 flights daily	<i>New York</i>	6 days weekly
<i>Karlsruhe</i>	2 days weekly	<i>Paris</i>	2 flights daily
<i>Munich</i>	2 flights daily	<i>Vienna</i>	5 flights daily
<i>Stuttgart</i>	6 flights weekly	<i>Zürich</i>	5 flights daily

# Successful in attracting investments

- Over 23 billion € of investments since 2008
- Many global leaders have decided to set up here
- Very active investment community
- German chamber of commerce AHK has over 350 members and German companies alone employ over 30.000 people in Serbia
- Amcham has over 600 members and its company members employ over 100,000 people in Serbia



**BOSCH**

**SIEMENS**



**MICHELIN**

**STADA**  
Arzneimittel

**MESSER**

**Continental**

**Henkel**



# Serbia has grown some of its own champions

- Serbia is also home to some of the biggest IT companies in the region, all organically grown from Serbia
- Serbian owned **Comtrade** is currently the largest IT company in the region with over 1.000 engineers on 16 locations globally



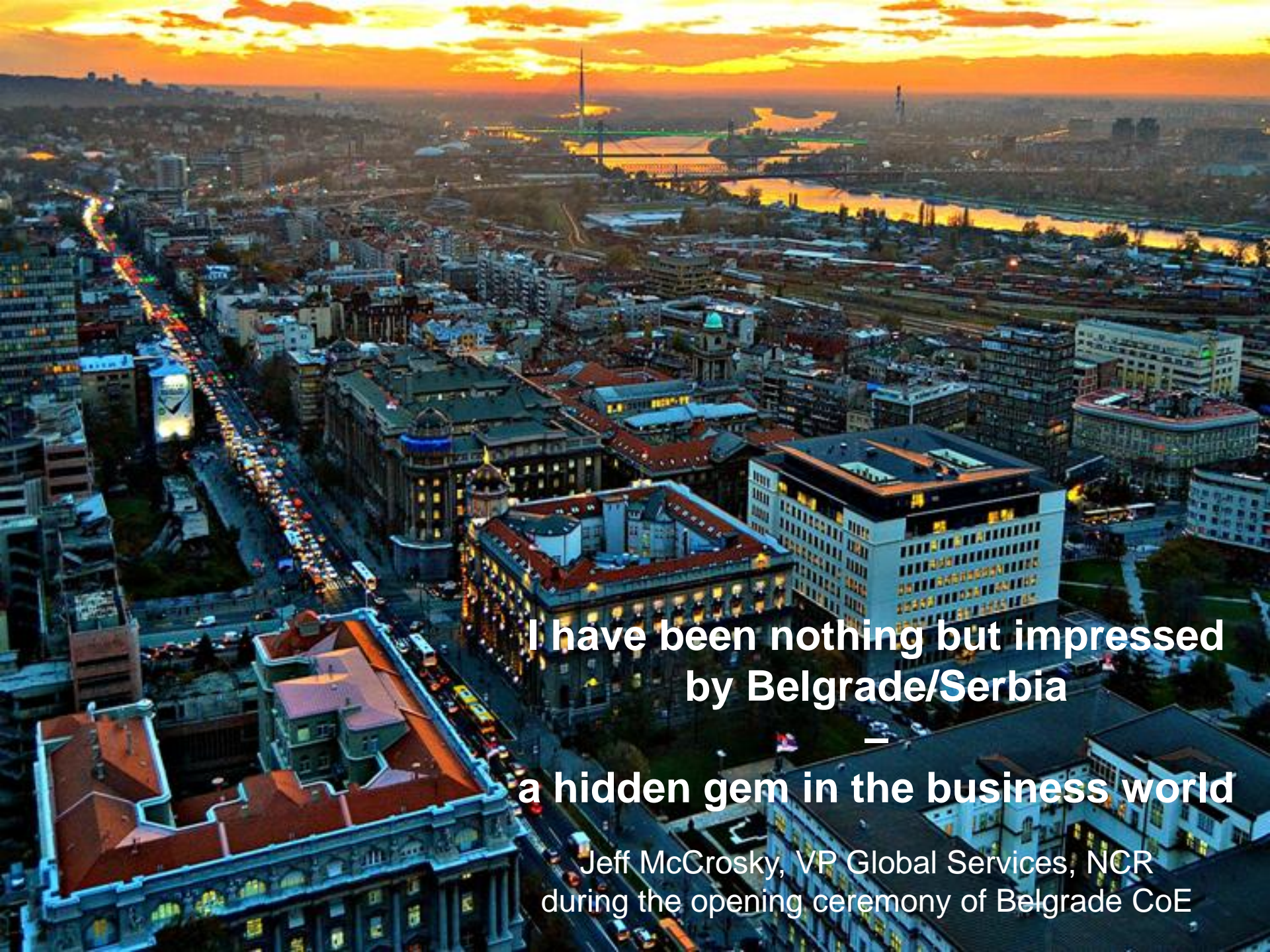
The business environment is stable, and it offers transparent market conditions, which creates a good starting point for our business growth in a long run.

*Marco Aspesi, VP Corporate Transformation  
at SR Technics*

The attractiveness of the location, logistics advantages, availability of skilled workforce, and a very good support of the Government of the Republic of Serbia and the local community are the main reasons for Bosch Group investment

*Mrs. Jovanka Jovanović, GM  
Robert Bosch Serbia*





**I have been nothing but impressed  
by Belgrade/Serbia**

—

**a hidden gem in the business world**

Jeff McCrosky, VP Global Services, NCR  
during the opening ceremony of Belgrade CoE



# Belgrade – not that hidden any more

- Belgrade is the new hot spot for hosting shared service centers.
- University center with 130,000 students.
- Rich pool of candidates with good language and technical skills.
- Reliable workforce, with good business culture and high level multilingualism.
- Reliable and quality telecom infrastructure

**FT** FINANCIAL  
TIMES

**CNN** Travel

**lonely planet**



City of the future

4<sup>th</sup> on the must visit list in 2018

“Belgrade has an exuberant population and is famous for its legacy as an intellectual hangout”



## Success Story – NCR’s CoE Belgrade

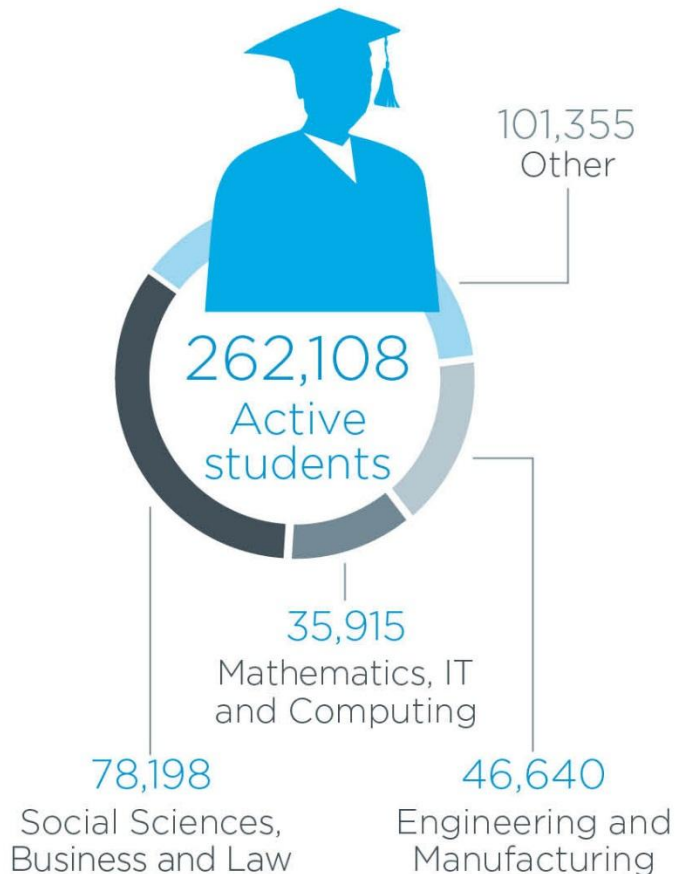
NCR (NYSE, NCR) is a 130-year-old global tech company with almost \$7bn of revenues and over 33,000 employees in more than 100 countries around the globe. The company is a global leader in consumer transaction technologies making nearly 550 million transactions every day.

- Through time, the Center massively exceeded all expectations and **it now employs around 3,000 people** with a plan of having over 4,000 in 2018.
- CoE provides multilingual **(17 languages)** technical support and coordination of field engineer dispatches
- **40% of the employees speak over two foreign languages fluently.**
- **75% of the employees are college graduates,** often with technical and management training.



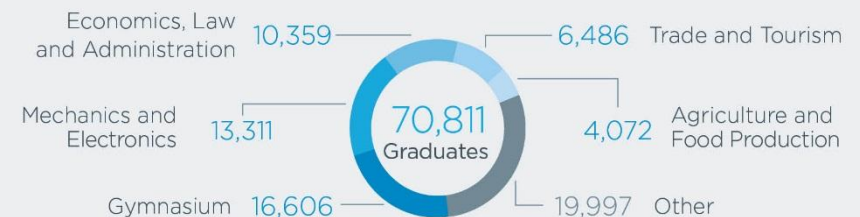
# Education in Serbia

## 5 University Centers across the Country



- Belgrade University and other educational institutors (such as international schools, colleges, etc) account for 50% of all students in the country.
- One third of students study technical sciences
- Education in Serbia is mandatory for prime education and there is an initiative to make secondary education compulsory as well.

## 508 High Schools across the Country



Source: Statistical Office of the Republic of Serbia, 2017



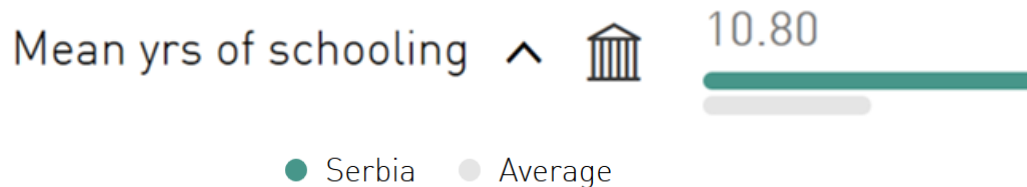
In 2016 Serbia was identified as one of 7 nations called “ **the TACTICS** ” and identified as potential stars in high education (Thailand, Argentina, Chile, Turkey, Iran, Colombia and Serbia).



# Average years of schooling

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United Nations Human Development Index 2016

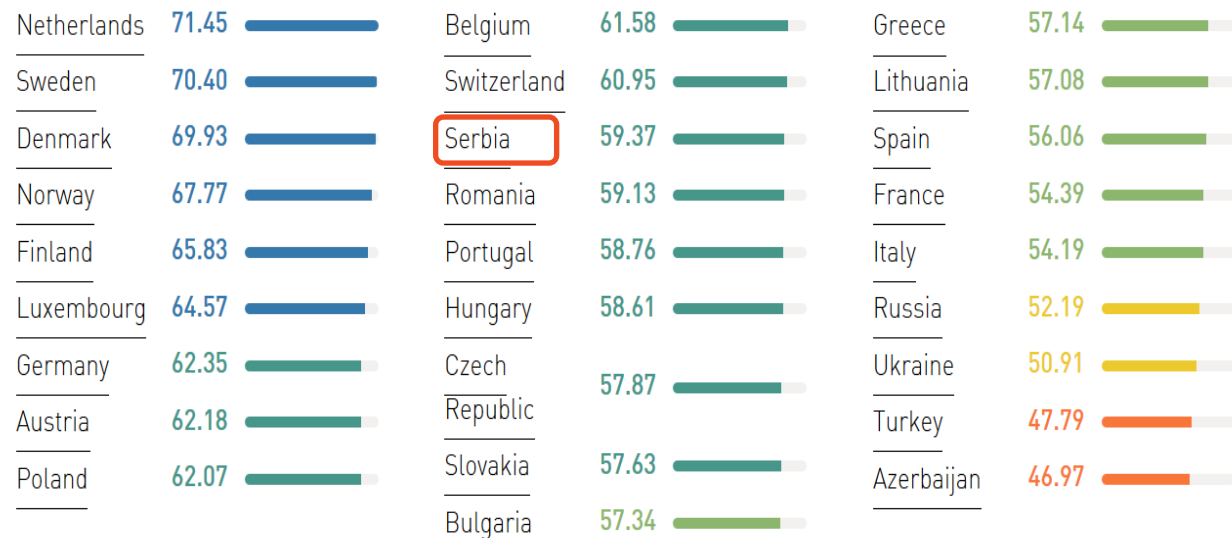
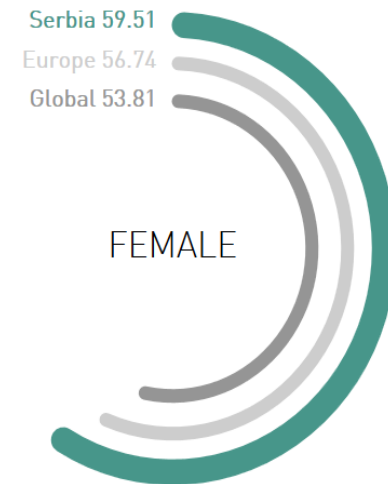
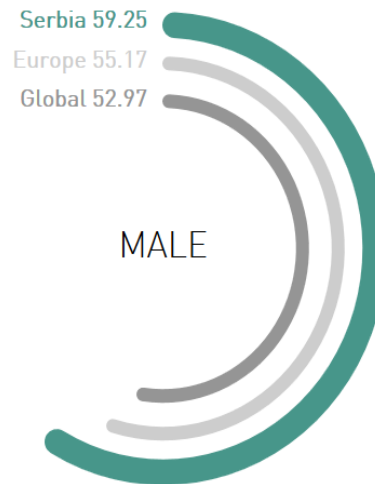
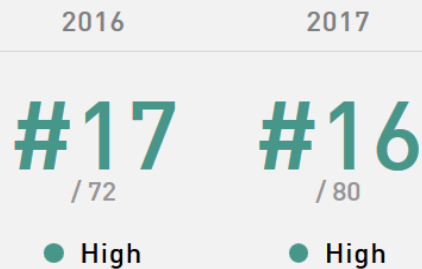


Mean years of schooling is the “average number of years of education received by people aged 25 and older, converted from education attainment levels using the official duration of each level.”

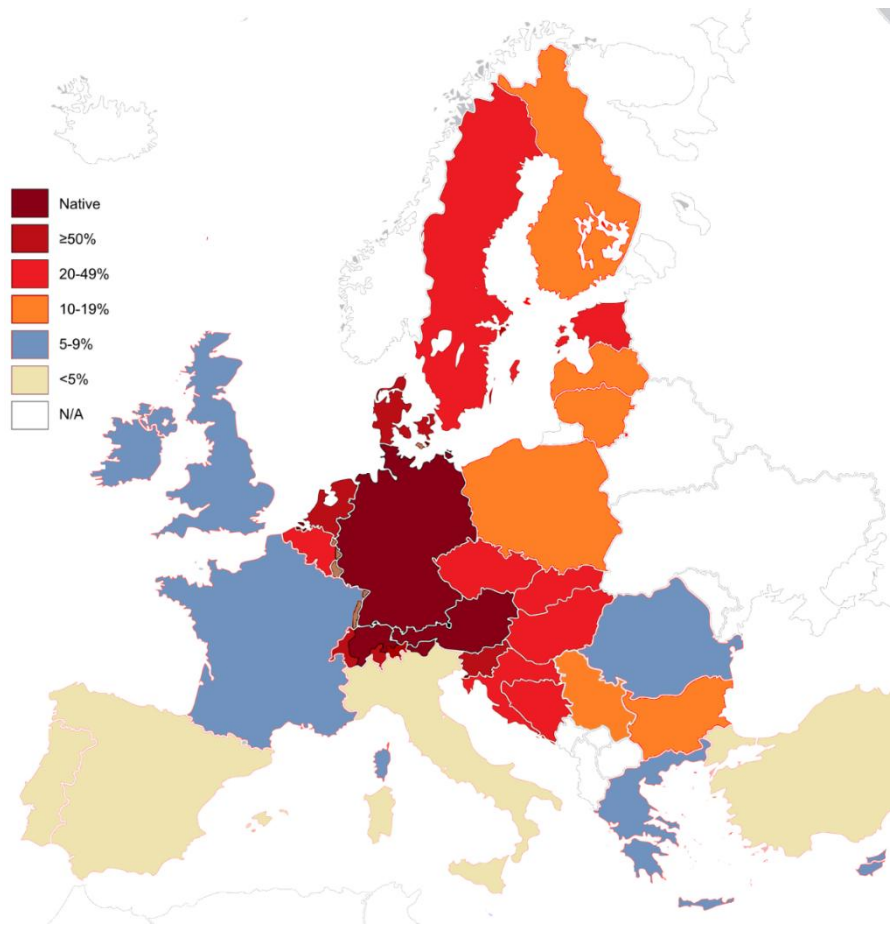
The EF EPI countries ‘2016’ global mean was 9.2 years,  
with the range of 2.5 (Yemen) to 12.9 (Germany)

# English proficiency index 2017

## Proficiency trend

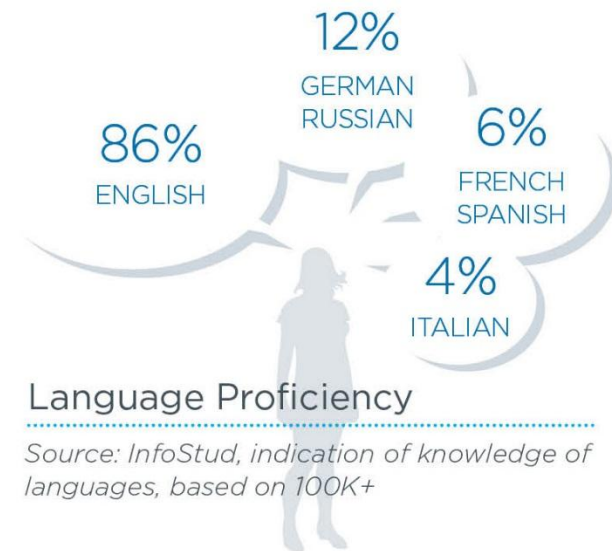


# What about German proficiency?



Source: One Europe, Infostud

- German is the second most spoken language in Europe and the most popular language to study after English



## Language Proficiency

Source: InfoStud, indication of knowledge of languages, based on 100K+

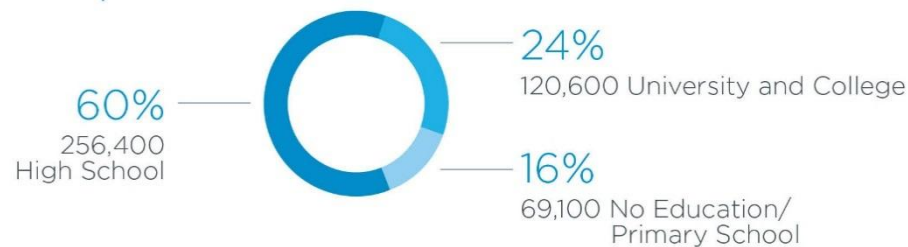
- German language in Serbia has gained popularity due to increased demand but also due to many “Gastarbeiter” families



# Unemployed

- Unemployment is still quite an issue in Serbia and especially so is the youth unemployment

The Structure of Unemployed by Level of Education

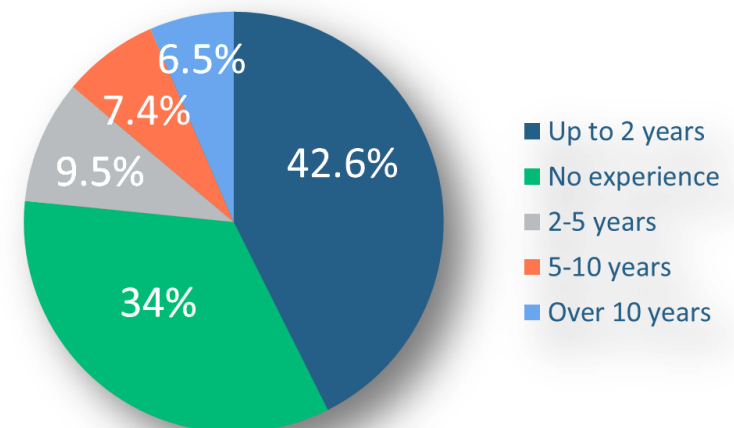


Source: \*Statistical Office of the Republic of Serbia, Labor Force Survey, Q3 2017.

- Belgrade alone has around 100.000 registered unemployed
- However, finding the right staff takes experience

- The largest job portal in Serbia is called Infostud and it has a database of over 130,000 CV's
- Over 70% are below 40 years of age

Structure of candidates by work experience



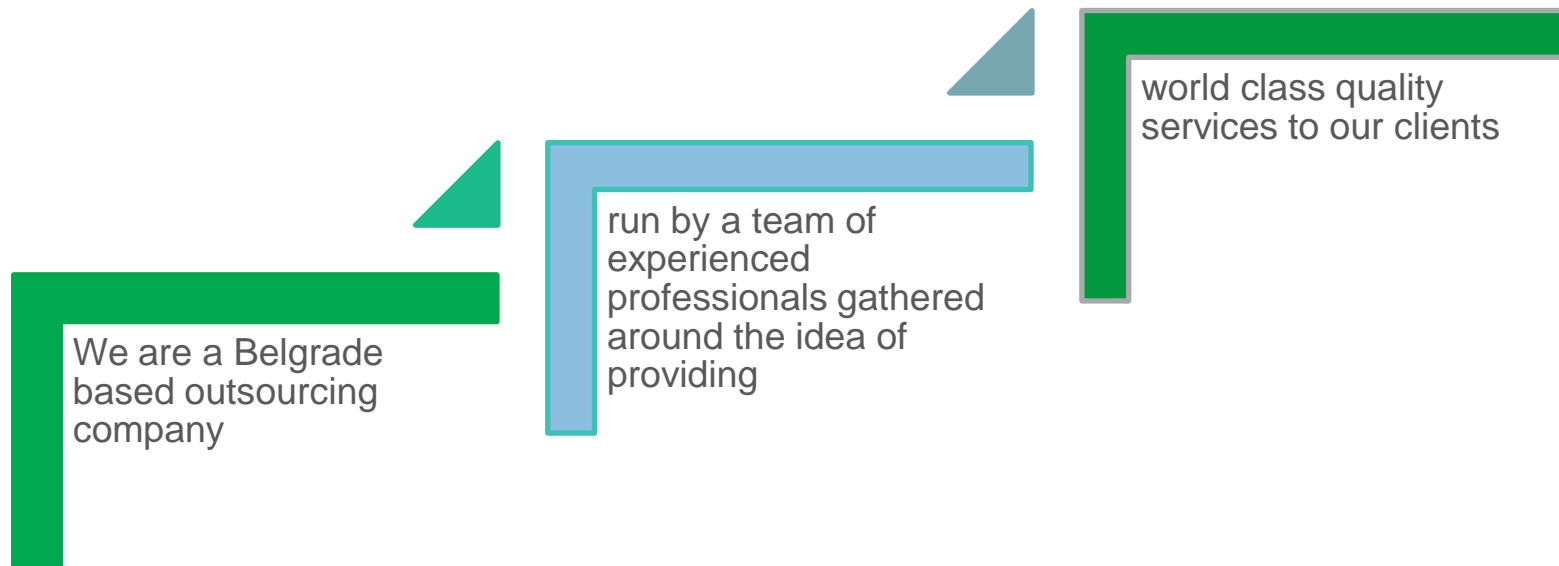
Source: Infostud, based on 34.000 CV's in Belgrade metropolitan area



**Your business - Our solutions**

# Who we are

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Our experience comes from **years of managing Services Projects for global leaders** on all verticals



# Why Rhein Solutions?

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## Key client challenges

- High attrition rates (staff turnover)
- Inflexible headcount structure (labor law)
- Overtime work regulation
- Quality and motivation of employees
- Management focus
- Lack of processes and process automation
- Customer satisfaction
- Cost-efficiency

## Benefits of Rhein Solutions

- Low attrition rates
- Flexible labor arbitrage
- Highly motivated employees
- Focus on specific tasks
- Tailored processes to specific tasks needed



Up to  
**50%**  
lower costs  
of operation

# Our set up

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We provide extensive set of centralized and decentralized services with focus on help desk, second level support, call acceptance, order processing, back office activities, technical control - all specially tailored to your business.

We provide our services in most European languages.

## Your key benefits

- 24/7 service
- Single point of contact for carriage and all equipment issues
- Single supplier instead of Multi-Vendor
- SLAs for service delivery (risk mitigation strategies)
- Transparent management costs and fixed price contracts
- Avoid double management and reporting systems
- Reduced costs for specialized IT staff

# Our Portfolio

## Dispatching

- Live monitoring and support of field service engineers
- Tracking of shipments
- Incident prioritization and distribution

## Order processing

- Order acceptance, fulfilment
- Reservation of time-slots, transportation, equipment
- Customer contact and order verification

## Project Management

- Off-site Rollout preparation
- Site visits, clarification of site readiness
- Transport and logistic coordination
- On-site installation, including system checks, network connection, online start-up and customer instruction

## IT-Support

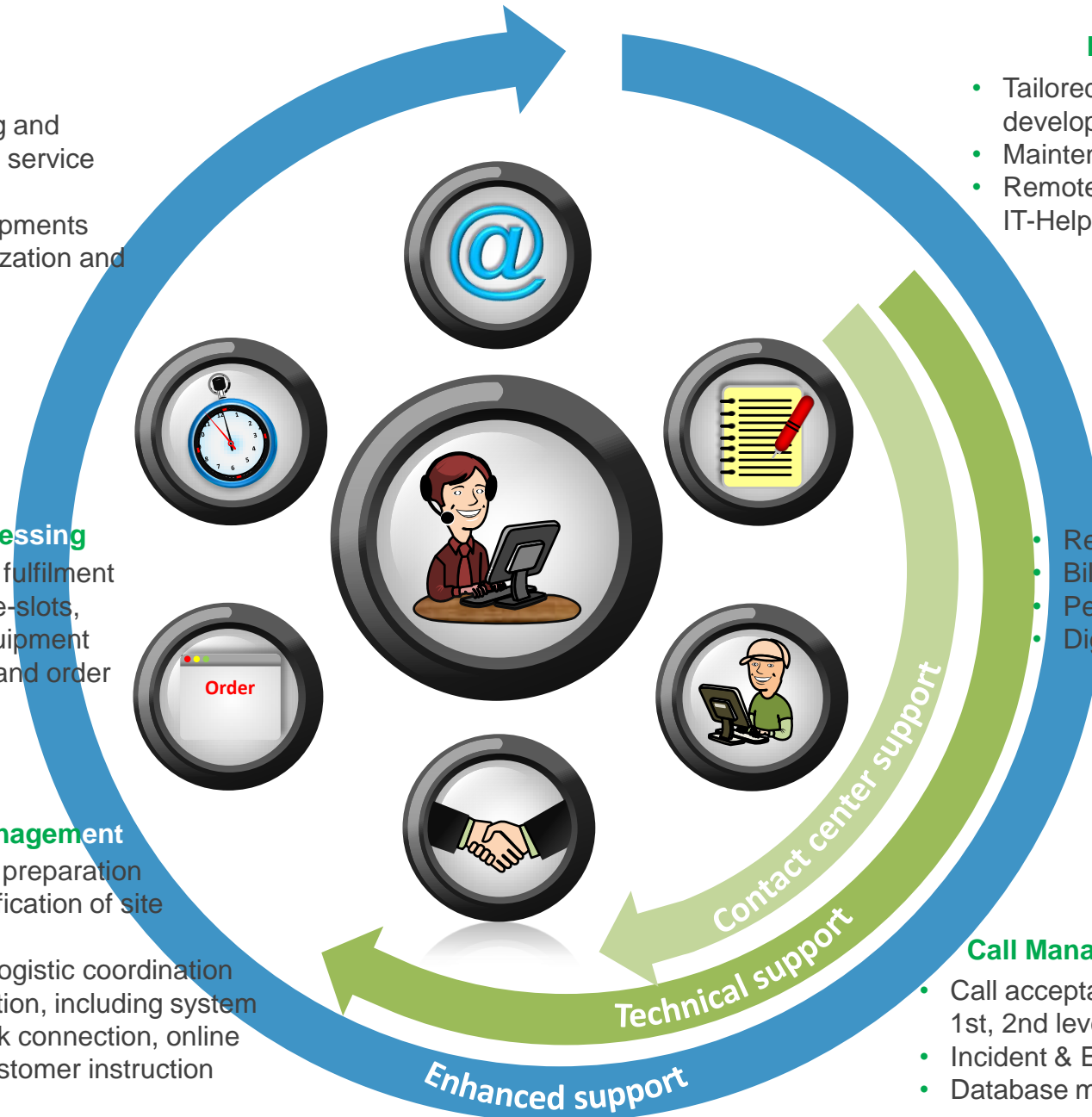
- Tailored software development
- Maintenance of existing tools
- Remote Software support & IT-Helpdesk

## Administration

- Recruitment & selection
- Billing & dunning
- Personnel administration
- Digitisation of paperwork

## Call Management & Help Desk

- Call acceptance & 1st, 2nd level support
- Incident & Escalation management
- Database maintenance





# Scalability

## *Rhein Solutions scalability potential*



- Many locations in Europe are struggling with scaling up and attrition rates.
- An ABSL report suggests same locations are entering maturity due to fierce competition and increased cross border mobility.
- The report states that outsourcing champions in Europe - Prague, Budapest, Krakow, Bucharest, Bratislava, Glasgow and Dublin enter the difficult zone an all positions on 25 people mark.

# HR Services

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## Hiring

- Understanding clients needs
- Internal/external collection of candidates
- Prescreening and shortlisting
- Assessment and selection

## Support

- Training and set up
- Probation and evaluation period
- Employee management
- Cont. Improvement activities
- Legal

## Payroll

- Records – absence, leave, other
- Time sheets and staff work records
- Payroll reports

## Our employees

- Our employees are :
  - Highly educated – 80% with University degree
  - customer oriented and taking full responsibility for delivery
  - acting with professional integrity, using the opportunity to educate the customer
  - seeing things from customers' point of view.

# References



**Canon**



**TOTAL**

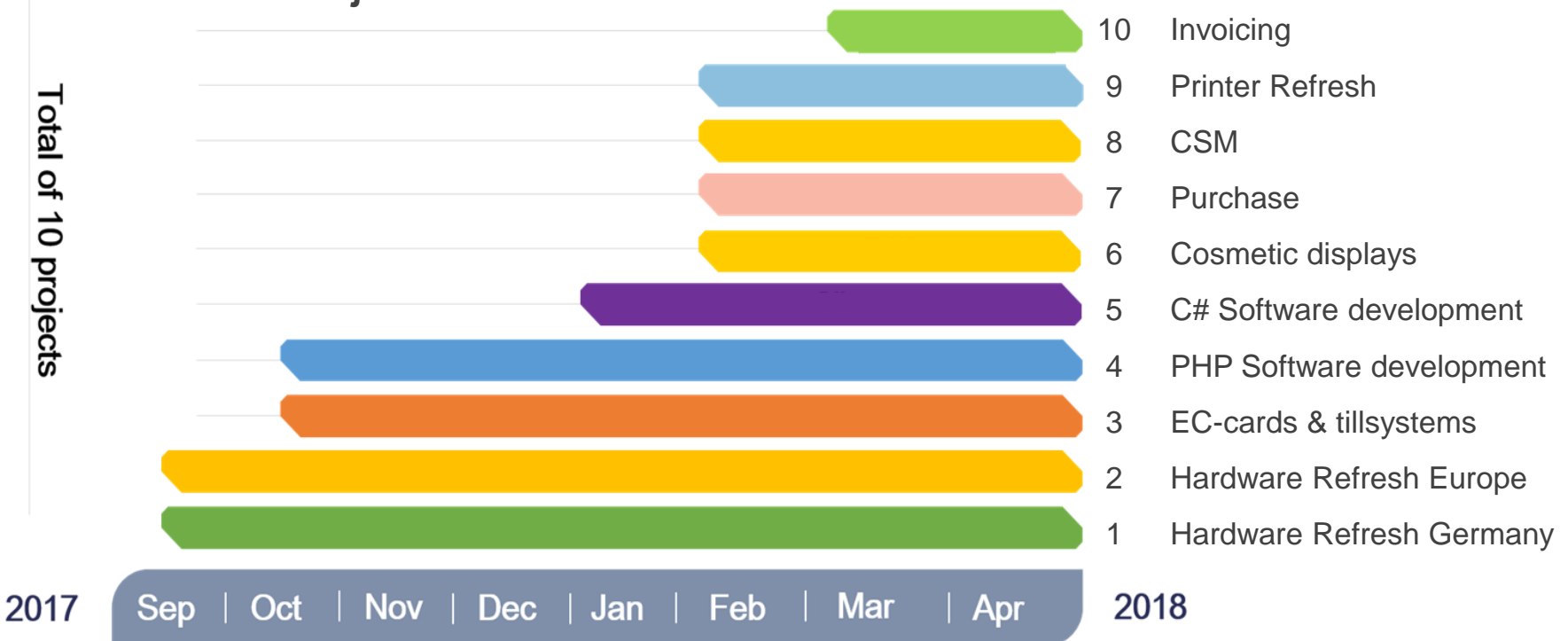




# Client development : IT Chain / Simon Hegele

- Existing client could not manage additional IT requests - we had an immediate solution
- Rhein Solutions IT experts updated and maintains clients database

- Overview of Project transition:**



# Our premises

We are located in the heart of Belgrade business area – New Belgrade, easily accessible from the Belgrade Airport (10 minutes ride by car), as well as downtown Belgrade (5 minutes). It is also well connected with other parts of the town via public transportation.

- High-tech facility in the heart of Belgrade's business area
- 2 independent UPS systems
- 2 independent HVAC systems
- 2 independent Internet providers (Serbian and Hungarian Telecom)
- 24/7 monitoring of facilities and multiple access security levels



# Pick our brains

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About Rhein Solutions



About Belgrade



About our clients



About anything really





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Thank you.  
Contact us for  
more detail.

