THE
WORLD STAGE

Who Does the Work Now?

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Who Does the Work Now?

The Shifting Line Between In-House, Outsourced and AI-Enabled Delivery

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Axis 1

Is outsourcing ending?

No — its real era may only be beginning.

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Is outsourcing ending? No — its real era may only be beginning.

Agree or Disagree?

AI will not eliminate the need for external partners;
it will increase demand for partners able to implement,
scale and govern AI-enabled delivery.

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Is outsourcing ending? No — its real era may only be beginning.

Agree or Disagree?

The key strategic question is no longer
“in-house or outsourced?”, but
“who can deliver transformation faster, safer and at scale?”

Agree or Disagree?

Specialised providers may gain an advantage because they spread investments, learnings and innovation across multiple clients and industries.

Is outsourcing ending? No — its real era may only be beginning.

Agree or Disagree?

Clients should challenge the assumption that bringing work back in-house automatically gives them more control or more value.

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Axis 2

Are FTE-based deals still fair?

No — but outcomes are harder to buy than hours.

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Are FTE-based deals still fair? No — but outcomes are harder to buy than hours.

Agree or Disagree?

The traditional outsourcing model built on headcount, effort and labour arbitrage is becoming increasingly misaligned with AI-enabled productivity.

Are FTE-based deals still fair? No — but outcomes are harder to buy than hours.

Agree or Disagree?

If automation breaks the link between effort and output, commercial models must shift from capacity to measurable business impact.

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Are FTE-based deals still fair? No — but outcomes are harder to buy than hours.

Agree or Disagree?

The biggest barrier to AI adoption may be commercial architecture: contracts, procurement processes, budgets and KPIs that still reward scale rather than efficiency.

Are FTE-based deals still fair? No — but outcomes are harder to buy than hours.

Agree or Disagree?

Outcome-based models create stronger alignment, but also raise difficult questions about accountability, risk sharing, transparency and measurement.

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Axis 3

Can captives out-innovate vendors?

Yes — but only if they stop being execution factories.

Can captives out-innovate vendors? Yes — but only if they stop being execution factories.

Agree or Disagree?

A well-run service provider can often innovate faster because it learns across markets, clients and transformation programmes.

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Can captives out-innovate vendors? Yes — but only if they stop being execution factories.

Agree or Disagree?

Captive centres still have powerful advantages: deep business context, enterprise alignment, stakeholder trust and proximity to strategic priorities.

Can captives out-innovate vendors? Yes — but only if they stop being execution factories.

Agree or Disagree?

If vendors can deliver the same outcomes with AI faster and cheaper, captive centres must reinvent their value proposition around expertise, governance and transformation.

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Can captives out-innovate vendors? Yes — but only if they stop being execution factories.

Agree or Disagree?

The future role of GBS is likely to shift from execution to orchestration: managing people, technology, vendors, risk and outcomes as one ecosystem.

Axis 4

Does location still matter?

Less than before — but adaptive regions will win the next investment wave.

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Does location still matter? Less than before — but adaptive regions will win the next investment wave.

Agree or Disagree?

By 2030, organisations may care less about where work is done and more about who can deliver reliable, scalable and intelligent outcomes.

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Does location still matter? Less than before — but adaptive regions will win the next investment wave.

Agree or Disagree?

Cities, employers, universities and public institutions should jointly shape the next value proposition: from delivery hub to innovation, orchestration and capability hub.

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Does location still matter? Less than before — but adaptive regions will win the next investment wave.

Agree or Disagree?

Kraków’s competitive position cannot rely only on scale, cost and available talent; it must increasingly rest on digital skills, AI readiness and ecosystem maturity.

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Does location still matter? Less than before — but adaptive regions will win the next investment wave.

Agree or Disagree?

The threat is not simply losing jobs to AI,
but losing investment to regions that adapt faster to new delivery models.

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Thank you!

Questions & Answers

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