Business Services Sector
in Katowice and the Silesia Metropolis
Report prepared for Katowice City Hall
by the Association of Business Service Leaders (ABSL)

in cooperation with:
Jones Lang LaSalle, PwC and HAYS Poland

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## POLAND – KEY DATA
Ladies and Gentlemen,

I am proud to present you with the latest report on business services in Katowice and the Silesia Metropolis.

Business services [BPO, ITO, SSC, R&D] in our region have expanded rapidly over recent years, which gives us a great sense of pride. This dynamic growth is confirmed by statistics showing a steady increase in employment over the past three years.

To attract new investment to the modern business services sector is one of our main long-term goals. It is the kind of support we want to bring to our changing economy.

So far investors are satisfied with our cooperation and are planning further expansion as well as further development of existing business, moving towards more advanced services. This will open up new opportunities for potential employees.

Further decisions regarding business and investment are made on the basis of good past experience. Investors appreciate our well-qualified staff and strong academic centers, excellent location and fine public transport system.

New and attractive employment is one of our priorities. We constantly work to create strong support for new business associated with the modern services sector. We have strong potential to develop the sector and are always ready for new challenges and projects. A significant number of service centers are already running in Katowice and other cities of Silesia: IBM, Capgemini, ING Services, Unilever, Oracle, Tele-Fonika Kable, Grupa Żywiec, Ruch, Mentor Graphics, Rockwell Automation, Kroll Ontrack and Ericsson among others.

We are also aware that good investment needs a good everyday life environment. Therefore we are devoting our efforts not only to changing our infrastructure but also to improving the overall quality of life in our city. One of the projects we are involved in is called “Culture Zone”. The project is designed to redevelop the area of the old “Katowice” coal mine and establish a cultural center there with an International Congress Center, a new venue for the Polish National Radio Symphony Orchestra and a new site for the Silesian Museum. Both the location and the nature of this development are symbolic – they are in line with the changes that are taking place in our city.

The target we have in mind is to establish our position on the European investment map and to build a modern metropolis with an environment tuned to a high quality of life and business for the benefit of both inhabitants and investors.

Piotr Uszok  
Mayor of Katowice
Katowice is a dynamically developing city with a population of three hundred thousand located in southern Poland. It is also the capital of the two-million strong Silesia Metropolis and an important academic, cultural and economic center of Poland and Central and Eastern Europe. Katowice regularly hosts the European Economic Congress – the largest business event in this part of Europe. With the appropriate human resources, the scientific and research facilities, favorable location and the unusual nature of this area, Katowice and the Silesia Metropolis are great places for developing outsourcing centers (BPO/ITO), shared service centers (SSC) and research and development centers (R&D).

**Location**
Katowice is located in the center of Europe, on routes between Berlin and Krakow, as well as Warsaw and Vienna. The city has easy access to three international airports: Katowice Airport [30 km from the city center], Kraków Airport and Ostrava Airport in the Czech Republic [both within a radius of 100 km of Katowice]. There is a well developed network of highways and railroad connections.

**Basic data**

### Area
Katowice: 165 km²
Silesia Metropolis: 1,218 km²

### Office Space [as of Q3 2013]
Katowice: 304,200 m²
Silesia Metropolis: 360,000 m²

### Population [2012]
Katowice: 307,000 [16% of total population of the Silesia Metropolis]
Silesia Metropolis: 1,917,000 [5% of total population of Poland]

### Number of Students [2012]
Katowice: 63,000
Silesia Metropolis: 115,000

### Number of Graduates [2012]
Katowice: 19,000
Silesia Metropolis: 35,000

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1 The union of 14 neighboring cities located in the Katowice conurbation: Bytom, Chorzów, Dąbrowa Górnicza, Gliwice, Jaworzno, Katowice, Mysłowiec, Piekary Śląskie, Ruda Śląska, Siemianowice Śląskie, Sosnowiec, Świętochłowice, Tychy and Zabrze.
Human capital
Availability and quality of human resources
115,000 students [2012]
35,000 graduates [2012]

Investment
Dynamic growth in the number of new investors in the business services sector.
BPO/ITO, SSC, R&D centers providing services to many global corporations (e.g. IBM, ING, Capgemini) and large Polish enterprises

Transportation
Developed transport system (highways, rail transport). Katowice Airport is the fourth airport in Poland in terms of passenger numbers

Openness and support
Favor of local authorities towards the investors
Support for development of office infrastructure
Katowice Special Economic Zone

Office space
Katowice is the sixth largest office market in Poland, with resources at the level of 304,200 m²

Attractiveness and quality of life
International cultural, entertainment and sports events, recreational green areas

FIGURE 2
Map of Silesia Metropolis and key data
Source: ABSL internal research

WHY KATOWICE?
1.3 Driving forces

**Human Resources** – Katowice is a city of young, well educated people with a good command of foreign languages, ready to take up the challenges posed by employers in the business services sector. Colleges and Universities in the Silesia Metropolis educate more than 115,000 students, representing 7% of the number of students nationally. Every year about 35,000 graduates with excellent and diverse skills enter the labor market.

**Scientific and Research Facilities** – The Silesia Metropolis hosts 29 colleges and universities offering diversified education programs. This ensures access to graduates from different areas of science, including graduates of majors most desired for the development of the business services sector, i.e. economy, finance, banking and engineering. The most important universities in the area include the University of Silesia in Katowice, the Silesian University of Technology in Gliwice, the University of Economics in Katowice and the Medical University of Silesia in Katowice. The Silesia Metropolis holds nearly 10% of the total R&D potential of the country, making it the second largest scientific center in Poland (after Warsaw), consisting of more than 80 scientific and R&D units.

**Quality of Life** – Katowice hosts numerous cultural, entertainment, sports and arts events: Rawa Blues Festival, Tauron Nowa Muzyka (winner of the European Festival Award in the category of Best Small Festival in 2013), the Silesia Jazz Festival, Mayday, OFF Festival. Each year these events attract hundreds of thousands of fans from around the world. Katowice also hosts an international school operating at three levels of education: primary, lower secondary and secondary. Thanks to its vast green areas and numerous sports and recreational facilities, Katowice is an attractive place to spend leisure time.

**Transport Infrastructure** – Katowice and the entire Silesia Metropolis is served by the international airport in Katowice (KTW Katowice Airport) located 30 km north of the city center. It is the fourth airport in Poland in terms of checked-in passengers (over 2,550,000 in 2012). Katowice Airport provides easy access to major European air hubs [e.g. Frankfurt, Munich, Düsseldorf] and offers a quick and comfortable trip to the US. There is
FIGURE 3
Katowice Airport – map of regular flights

WHY KATOWICE?

Business Services Sector in Katowice and the Silesia Metropolis

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also a smaller airport in Katowice – Katowice Muchowiec (EPKM), serving smaller business and local traffic. In addition there are two other international airports within a radius of ca. 100 km from Katowice, i.e. Kraków Airport and Ostrava Airport in the Czech Republic. Important international transport routes meet in Katowice: from Berlin (Germany) to Lviv (Ukraine) and from Gdańsk (Poland) to Vienna (Austria). The city provides convenient railroad connections with other major centers: Warsaw, Wrocław, Opole, Kraków, Gdańsk and the capitals of the neighboring countries: Berlin, Prague, Vienna, Bratislava and Kiev. The internal transport network of Katowice is very well developed thanks to highways, expressways and railways. Investing in the development of transport infrastructure contributes to improving the accessibility of the city each year.

Investment Incentives – the Katowice Special Economic Zone offers its investors the opportunity to benefit from state aid in the form of tax exemptions (40%) when incurring expenditures or creating new jobs. By the end of 2012, over 200 companies had invested in the Katowice Special Economic Zone, including companies in the business services sector.

1.4 Katowice: space for success

> 1st place in the category of the “Newcomer city of the year”, intended for Polish emerging stars of the business services sector in 2013. The prize was awarded at the “Poland Outsourcing and Shared Services Awards” gala.
> Katowice City won Prime Property Prize 2013 in the category “Investor-friendly City” – for the actions of local authorities.
> 1st place [for the third time in a row] in the “Friendly City 2012” organized by the publisher of the Forum Biznesu magazine and held under the auspices of the Ministry of Regional Development.
> 1st place in terms of quality of the strategy to attract foreign direct investment in 2012 in the ranking “European Cities and Regions of the Future 2012/2013” published by the fDi Magazine and 5th place in the group of small European cities evaluated in the same category.
> According to Newsweek weekly, Katowice is Poland’s best city to live in (2010).
Katowice and the Silesia Metropolis are strengthening their position as leaders in business services in Poland. The dynamic growth of industry in the metropolis is increasingly attracting the attention of global leading brands that decide to locate their investments here. The high potential of the region is also reflected in the development of BPO, ITO, SSC and R&D, all of which are already present in the local market.

Katowice and the Silesia Metropolis are among the six most important centers of modern business services in Poland. 56 service centers, owned by 49 investors from 10 countries, are located here. They are mainly companies originating in the USA (16) and Poland (11), but also corporations from the United Kingdom (6), France (5), the Netherlands (4), Germany (2), Sweden (2), Finland (1), India (1) and Canada (1).

Currently, service centers in Katowice and the Silesia Metropolis employ 12,000 people. The vast majority of these (8,200) work for companies with foreign capital. This means they rank sixth in terms of the number of employees in foreign service centers in the country (after Krakow, Warsaw, Wroclaw, Gdansk and Lodz).

The majority of business service centers in the Silesia Metropolis are located in Katowice (39 out of 56), which constitutes 66% of total employment in the sector in this area.

The majority of employment has been generated by companies with Polish (31%), French (22%), American (17%) and British (17%) capital.

18 of the service centers located in Katowice and the Silesia Metropolis are shared service centers (SSC), 12 IT outsourcing centers (ITO), 12 contact centers, 8 R&D centers, and 6 business process outsourcing centers (BPO).

Employment in service centers in Katowice and the Silesia Metropolis increased by 4,000 people from January 2012 to October 2013 (from 8,000 to 12,000). Approximately 35% of these new jobs were created by new centers, established in this period, while the remaining 65% were generated by entities already operating before 2012. Given the companies’ development plans it can be assumed that by the end of 2014, employment in the industry will reach 15,000 people, which is almost double when compared to the beginning of 2012. In addition, more new jobs are likely to be created by those companies who have not yet announced their investments.

The dynamic development of the business services sector in Katowice and the Silesia Metropolis is demonstrated by the fact that the service centers which started operations in 2012-2013 have already generated 14% of total employment in the industry. It can be assumed that at the end of 2014, their share will increase to over 20%. The total investment in the years 2012-2013 and until the end of 2014 will have generated nearly 2,100 additional new jobs, predominantly in Katowice.
**TABLE 1**
List of investors who own service centers in Katowice and the Silesia Metropolis

<table>
<thead>
<tr>
<th>Investor</th>
<th>Type of SC</th>
<th>Location</th>
<th>Year of establishment</th>
<th>Employment [no. of persons employed]</th>
<th>Business service categories offered</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Capgemini</td>
<td>ITO, BPO</td>
<td>Katowice</td>
<td>2006</td>
<td>&gt;1,000</td>
<td>IT, F&amp;A, CS, FS</td>
</tr>
<tr>
<td>2 Gallup Arteria Management</td>
<td>CC</td>
<td>Ruda Śląska</td>
<td>1999</td>
<td>&gt;1,000</td>
<td>CS</td>
</tr>
<tr>
<td>3 Orange</td>
<td>CC</td>
<td>Katowice</td>
<td>2004</td>
<td>500-1,000</td>
<td>CS</td>
</tr>
<tr>
<td>4 Future Processing</td>
<td>ITO</td>
<td>Gliwice</td>
<td>2008</td>
<td>500-1,000</td>
<td>IT</td>
</tr>
<tr>
<td>5 ING Services</td>
<td>SSC, R&amp;D</td>
<td>Katowice</td>
<td>2003</td>
<td>500-1,000</td>
<td>IT, CS, R&amp;D</td>
</tr>
<tr>
<td>6 ista</td>
<td>SSC</td>
<td>Gliwice, Katowice</td>
<td>2006</td>
<td>500-1,000</td>
<td>CS, F&amp;A</td>
</tr>
<tr>
<td>7 ArcelorMittal</td>
<td>SSC</td>
<td>Dąbrowa Górnicza</td>
<td>2008</td>
<td>250-500</td>
<td>F&amp;A, HR</td>
</tr>
<tr>
<td>9 Grupa Żywiec</td>
<td>CC</td>
<td>Katowice</td>
<td>2011</td>
<td>250-500</td>
<td>CS</td>
</tr>
<tr>
<td>10 HireRight</td>
<td>BPO</td>
<td>Katowice</td>
<td>2004</td>
<td>250-500</td>
<td>CS, HR, Other</td>
</tr>
<tr>
<td>11 IBM</td>
<td>ITO</td>
<td>Katowice</td>
<td>2013</td>
<td>250-500</td>
<td>IT, HR, CS</td>
</tr>
<tr>
<td>12 Katowicki Holding Węglowy</td>
<td>SSC</td>
<td>Katowice</td>
<td>2012</td>
<td>250-500</td>
<td>F&amp;A, HR, IT, IT</td>
</tr>
<tr>
<td>14 Poczta Polska</td>
<td>SSC</td>
<td>Katowice</td>
<td>2012</td>
<td>250-500</td>
<td>CS, DM</td>
</tr>
<tr>
<td>15 PwC</td>
<td>SSC</td>
<td>Katowice</td>
<td>2009</td>
<td>250-500</td>
<td>Other</td>
</tr>
<tr>
<td>16 Rockwell Automation</td>
<td>SSC</td>
<td>Katowice</td>
<td>2006</td>
<td>250-500</td>
<td>F&amp;A, HR, IT, CS, R&amp;D</td>
</tr>
<tr>
<td>17 Ruch</td>
<td>SSC</td>
<td>Katowice</td>
<td>2011</td>
<td>250-500</td>
<td>F&amp;A</td>
</tr>
<tr>
<td>18 Sine Qua Non</td>
<td>CC</td>
<td>Sosnowiec</td>
<td>2008</td>
<td>250-500</td>
<td>CS</td>
</tr>
<tr>
<td>19 Steria</td>
<td>ITO</td>
<td>Katowice</td>
<td>2007</td>
<td>250-500</td>
<td>IT</td>
</tr>
<tr>
<td>20 Tauron</td>
<td>SSC</td>
<td>Gliwice, Katowice</td>
<td>2008</td>
<td>250-500</td>
<td>F&amp;A, CS, HR, IT</td>
</tr>
<tr>
<td>21 Unilever</td>
<td>SSC</td>
<td>Katowice</td>
<td>2008</td>
<td>250-500</td>
<td>F&amp;A, CS, Other</td>
</tr>
<tr>
<td>22 Bombardier Transportation</td>
<td>R&amp;D</td>
<td>Katowice</td>
<td>2001</td>
<td>100-250</td>
<td>R&amp;D</td>
</tr>
<tr>
<td>23 Ericsson</td>
<td>ITO</td>
<td>Katowice</td>
<td>2009</td>
<td>100-250</td>
<td>IT</td>
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<tr>
<td>24 Maksimum</td>
<td>CC</td>
<td>Katowice</td>
<td>2008</td>
<td>100-250</td>
<td>CS</td>
</tr>
<tr>
<td>25 NorthgateArinso</td>
<td>BPO</td>
<td>Katowice</td>
<td>2007</td>
<td>100-250</td>
<td>HR, IT</td>
</tr>
<tr>
<td>26 Pregis</td>
<td>SSC</td>
<td>Gliwice</td>
<td>2008</td>
<td>100-250</td>
<td>F&amp;A</td>
</tr>
<tr>
<td>27 TELE-FONIKA Kable</td>
<td>SSC</td>
<td>Katowice</td>
<td>2012</td>
<td>100-250</td>
<td>F&amp;A, CS</td>
</tr>
<tr>
<td>28 UPC</td>
<td>CC</td>
<td>Katowice</td>
<td>2008</td>
<td>100-250</td>
<td>CS</td>
</tr>
<tr>
<td>29 Wipro</td>
<td>BPO</td>
<td>Dąbrowa Górnicza</td>
<td>2009</td>
<td>100-250</td>
<td>F&amp;A, HR, IT</td>
</tr>
<tr>
<td>30 4EverNET</td>
<td>CC</td>
<td>Katowice</td>
<td>2002</td>
<td>&lt;100</td>
<td>CS</td>
</tr>
<tr>
<td>31 Aegon</td>
<td>CC</td>
<td>Chorzów</td>
<td>2009</td>
<td>&lt;100</td>
<td>CS</td>
</tr>
<tr>
<td>32 Barona</td>
<td>ITO</td>
<td>Katowice</td>
<td>2012</td>
<td>&lt;100</td>
<td>IT</td>
</tr>
<tr>
<td>33 Cyclad</td>
<td>ITO</td>
<td>Katowice</td>
<td>2008</td>
<td>&lt;100</td>
<td>IT</td>
</tr>
<tr>
<td>34 DisplayLink</td>
<td>R&amp;D</td>
<td>Katowice</td>
<td>2008</td>
<td>&lt;100</td>
<td>R&amp;D</td>
</tr>
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<td>Eniro</td>
<td>CC</td>
<td>Katowice</td>
<td>2001</td>
<td>&lt;100</td>
<td>CS</td>
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<td>General Motors</td>
<td>SSC</td>
<td>Gliwice</td>
<td>2008</td>
<td>&lt;100</td>
<td>F&amp;A</td>
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<td>Generali</td>
<td>CC</td>
<td>Katowice</td>
<td>2011</td>
<td>&lt;100</td>
<td>CS</td>
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<tr>
<td>Goyello</td>
<td>ITO</td>
<td>Gliwice</td>
<td>2008</td>
<td>&lt;100</td>
<td>IT</td>
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<tr>
<td>Grant Thornton</td>
<td>BPO</td>
<td>Katowice</td>
<td>2007</td>
<td>&lt;100</td>
<td>F&amp;A</td>
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<tr>
<td>Kroll Ontrack</td>
<td>R&amp;D, ITO</td>
<td>Katowice</td>
<td>2004</td>
<td>&lt;100</td>
<td>IT, R&amp;D</td>
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<tr>
<td>Neubloc</td>
<td>R&amp;D</td>
<td>Katowice</td>
<td>2009</td>
<td>&lt;100</td>
<td>IT, R&amp;D</td>
</tr>
<tr>
<td>Oracle</td>
<td>ITO, Technical Solution Center</td>
<td>Katowice</td>
<td>2012</td>
<td>&lt;100</td>
<td>IT, CS</td>
</tr>
<tr>
<td>Proximetry</td>
<td>R&amp;D, ITO</td>
<td>Katowice</td>
<td>2006</td>
<td>&lt;100</td>
<td>IT, R&amp;D</td>
</tr>
<tr>
<td>Saint-Gobain</td>
<td>SSC</td>
<td>Dąbrowa G., Gliwice</td>
<td>2008</td>
<td>&lt;100</td>
<td>F&amp;A</td>
</tr>
<tr>
<td>SMT Software</td>
<td>ITO</td>
<td>Katowice, Gliwice</td>
<td>2011</td>
<td>&lt;100</td>
<td>IT</td>
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<tr>
<td>Tenneco</td>
<td>R&amp;D</td>
<td>Gliwice</td>
<td>2001</td>
<td>&lt;100</td>
<td>R&amp;D</td>
</tr>
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<td>Timken</td>
<td>CC</td>
<td>Sosnowiec</td>
<td>2006</td>
<td>&lt;100</td>
<td>CS</td>
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<td>Warta</td>
<td>CC</td>
<td>Katowice</td>
<td>2009</td>
<td>&lt;100</td>
<td>CS</td>
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<tr>
<td>Webanywhere</td>
<td>ITO</td>
<td>Katowice</td>
<td>2012</td>
<td>&lt;100</td>
<td>IT</td>
</tr>
</tbody>
</table>

Source: ABSL study


Types of centers: CC: Contact Center, R&D: Research & Development, SSC: Shared Service Center, BPO: Business Process Outsourcing, ITO: IT Outsourcing

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**Methodological notes:**

The description of the business services sector contained in this section has been prepared for publication on the basis of information contained in the database of the Association of Business Service Leaders in Poland (ABSL) and the results of an online survey addressed to service centers’ management. 21 companies from the region, employing 7,000 persons – i.e. 58% of all workers in the sector in Katowice and the Silesia Metropolis participated in the survey. The information obtained by the survey made it possible to expand the service center database in the studied area and enabled the preparation of aggregated statistics relating to the operation of these entities (thematic analyses in the report).

The report adopts a broad definition of the industry concerned, including research and development. Its considerations are based on an analysis of both foreign and Polish service centers: Shared Service Centers (SSC), Business Process Outsourcing (BPO), IT Outsourcing (ITO), Research and Development (R&D), and Customer Contact Centers. The category of outsourcing centers mentioned in the report does not include companies from the IT sector, where service outsourcing does not represent the majority of revenue. It is worth noting that some of the centers support both the parent company and external customers. This is called a hybrid delivery model. In the report, no separate mixed type of BPO/SSC is distinguished, but individual entities were assigned to the basic types (BPO, ITO, SSC, R&D, and SSC) on the basis of the parent profile. The spatial unit of the analysis in the characterization of service centers was the Silesia Metropolis. In some places, details about the city of Katowice are additionally provided.

The authors of this report wish to thank the representatives of the companies and institutions for the time they spent filling the surveys and preparing the data used in this report.
Types of business services provided in service centers

The largest number of business service centers in Katowice and the Silesia Metropolis operate in IT services (38% of all businesses), and in customer service (also 38%). Less than a third of them perform financial and accounting services (32%). Another item on the list is Research and Development (21% of centers), which is implemented not only in R&D centers but also in some of the more advanced service outsourcing companies. 16% of the centers maintain processes related to human resources management. Other activities carried out in service centers in Katowice and the Silesia Metropolis include, amongst others: supply management, decision support and knowledge process outsourcing, financial services, document management and auditing services support.
The industry structure of companies supported by the service centers in Katowice and the Silesia Metropolis

This part of the report discusses the industry structure of the internal and external customers of the analyzed service centers. It also presents the structure of employment in the shared service centers (SSCs) in Katowice and the rest of the Silesia Metropolis by industry of their parent companies. The business profiles of these companies are assigned to the categories of business as stated in Table 2.

The geographical scope of services

The service centers in Katowice and the rest of the Silesia Metropolis support the business processes of companies from different parts of the world. Most of them are focused on serving customers in Western Europe. For every third center, however, the main area of activity is Poland. The analyzed centers include those that are focused on serving customers in North America, and Central and Eastern Europe.

<table>
<thead>
<tr>
<th>TABLE 2</th>
<th>Industry structure of companies supported by the service centers in Katowice and the Silesia Metropolis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Branch</td>
<td>Examples of economic activities</td>
</tr>
<tr>
<td>Industrial and Consumer Goods</td>
<td>construction, aerospace &amp; defense, containers &amp; packaging, electronic equipment, automotive, food, personal goods etc.</td>
</tr>
<tr>
<td>Consumer Services</td>
<td>retail &amp; distribution, media &amp; entertainment, travel</td>
</tr>
<tr>
<td>Health Care</td>
<td>incl. pharma &amp; biotechnology</td>
</tr>
<tr>
<td>Energy, Utilities and Basis Materials</td>
<td>oil, gas; electricity, gas, water; chemicals, forestry &amp; paper, mining, metals</td>
</tr>
<tr>
<td>Banking, Insurance, Financial Services (BIFS)</td>
<td>banking, insurance, investments</td>
</tr>
<tr>
<td>Technology &amp; Telecom</td>
<td>software, hi-tech, telecom</td>
</tr>
<tr>
<td>Public sector</td>
<td>government related services</td>
</tr>
<tr>
<td>Other</td>
<td>consulting services</td>
</tr>
</tbody>
</table>

Source: ABSL study

The main beneficiaries of the service centers analyzed are producers of industrial and consumer goods, and companies operating in the financial sector (48% of the responses). The centers operate on behalf of their clients (internal and external) in sectors such as consumer services, energy and utilities, or technology and telecommunications (38% of the responses). The less supported industries are the public sector (33%) and healthcare (24%). Customers positioned in other industries are indicated 24% of the respondents.
The structure of employment in shared service centers (SSCs), by industry of the parent company, shows that those centers that provide services for manufacturers have the highest share in the employment structure of the analyzed market (34%). The second largest sector in terms of employment is parent companies in the energy sector (31% of total employment). Significantly fewer persons are employed by those SSCs that support consumer service companies (13%) and financial services companies (11%). Centers working for parent companies in other industries generate 11% of employment.

The employment structure of the companies surveyed shows that most SSC employees are involved in IT services (39% of the total number), which includes employment in services in the field of infrastructure management (23%) and applications management (16%). More than 28% of employees are involved in finance and accounting. Almost 15% of workers provide services in the field of customer service. The share of those employed in research and development exceeds 5%. It is worth noting that 2.5% of the workers in the studied service centers in Katowice and the Silesia Metropolis are foreigners.
The vast majority of sector employees in Katowice and the Silesia Metropolis are commuters from outside the city where the service center is located. This reflects the high mobility of the region’s inhabitants. The high percentage of commuters in the total pool of employees is due to the well-developed network of roads and public transport across the Silesia Metropolis. It is worth noting that in over 38% of the centers analyzed, commuters account for more than three quarters of the employees.

The commuter zone in the case of service centers in Katowice is extensive. The employees of the entities analyzed commute from more than 13 different places. Most of them are residents of towns immediately adjacent to Katowice: Sosnowiec, Tychy, Chorzów, Ruda Śląska. Katowice also attracts workers from further afield: Gliwice, Zabrze, Bytom and Dąbrowa Górnicza. The service centers in Katowice also employ commuters from other Polish municipalities, such as Jastrzębie-Zdrój, Knurów, Mikołów, Żory, Krakow, and even Wroclaw. The service centers located in towns such as Dąbrowa Górnicza, Chorzów, or Ruda Śląska have more limited commuter zones (average of 3-4 municipalities). They typically employ within the zone of neighboring towns and villages.
Service centers in Katowice and the Silesia Metropolis provide their services in 26 languages – mostly European ones. Surveys have shown that the vast majority of centers (86%) provide services using English. They are followed by service centers that use Polish (81%), German (43%), French (33%) and Spanish (33%). A large percentage is made up of service centers using other European languages, such as Russian, Ukrainian, Belarusian, Lithuanian and Latvian. It is worth noting that about 1/3 of the centers work with eight or more languages, and the two largest centers use at least 18. Specialized SSCs – mainly R&D – speak only one language (English), while BPO and ITO centers use a wider range of languages (5-8) to contact customers.

The vast majority of service centers in Katowice and the Silesia Metropolis plan to implement changes in their activities over the next three years (76% of respondents). Among these centers, the main direction of transformation will be the introduction of more advanced operations without reducing the existing scope of services (94% of respondents). In other centers, transformation will involve the introduction of more advanced operations while reducing the existing scope of services.

The vast majority of the service centers in Katowice and the Silesia Metropolis covered by our analysis offer non-wage benefits for employees (over 85%). Most
of them allow employees a choice of several different bonuses [6 to 9]. The most common types are shown in Figure 10.

These include the following benefits: medical service packs [78%], language courses [72%], and benefit cards [72%]. Many centers also offer the opportunity of co-financing higher education, postgraduate or other specialized courses [67%] and life insurance [67%]. Less popular forms of non-wage benefit are: gym tickets [44%], the ability to buy shares on preferential terms [22%] and extra health insurance [22%]. It should be noted that, as in the case of service centers located in other cities, the possibility to use selected non-wage benefits may depend on the posts held by the employees.

The survey asked representatives of service centers for their opinion on the characteristics of Katowice as a place for running a business. The results show that all the evaluated characteristics were assessed positively. Representatives of service centers recognized their cooperation with municipal authorities as good (the average score was 3.9 on a 1–5 scale). The respondents evaluated the transport accessibility of Katowice as equally good [3.9]. According to company representatives, Katowice has a fairly good image in the view of investors (average of 3.6) and good accessibility of modern office space [3.6]. The availability of highly qualified employees and the quality of public transport was also rated significantly above the average [3.5].
Business service centers in Katowice and the Silesia Metropolis often exploit the opportunity to cooperate with universities. One of the most important forms of their activity in this area is to open the possibility of internships for both students and academics. Service centers are also involved in teaching activities: lectures, workshops and active cooperation with student organizations. Service centers cooperate with academic career offices, support recruitment processes and participate in job fairs. In addition, they actively participate in meetings regarding the academic curricula.

An example of cooperation between universities and the business services sector is the Innovation and Technology Transfer Centre (CITT) at the Silesian University of Technology:

As a university-wide organization, CITT works closely with many companies in the industry, conducting of joint research projects, implementing of the latest technologies in business services centers, and organizing dedicated training courses for employees. In addition, CITT offers a wide range of expert services (analyses, opinions, evaluations, feasibility studies, audits), laboratory studies, research studies and original law-protected solutions, e.g. patents, industrial designs, copyrights (e.g. computer programs), and know-how. With shared databases of Technologies and Services, Experts and Equipment (www.citt.polsl.pl), our partners can search for innovative solutions, advisers, research teams and equipment. In addition to the above-mentioned partners cooperating in the field of vocational activities of students and profiling of university faculties, CITT is focused on the development and implementation of research cooperation with companies from the SME sector, as well as international corporations. Its expert services, ready technologies and other solutions have been employed by service centers (BPO, ITO, SSC and R&D), manufacturers, and consulting companies.

Companies implementing joint projects with universities include IBM and Future Processing:

IBM Service Center works with some of the top universities in the region, including the Silesian University of Technology, University of Silesia, the Katowice School of Economics and the Academy of Business in Dabrowa Gornicza. In 2013, IBM Poland entered into another cooperation agreement with the University of Economics in Katowice as a part of the IBM Academic Initiative. Under the agreement, the University will expand its educational program to include activities using the latest technology and software, IBM’s Big Data and Business Intelligence. Additionally, students, postgraduates and university scientists will be able to participate in cloud activities. Some of them will be offered work placements in the IBM center in Katowice.

Future Processing works with the Silesian University of Technology in Gliwice, including in the field of research and development. Future Processing has also signed a cooperation agreement with the University of Silesia. The company is the founder of two fully equipped computer labs at the Silesian University of Technology and the University of Silesia. It further supports such periodical events as the Individual Programming Competition, held at Silesian University of Technology. This cooperation has resulted in activities related to the transfer of knowledge to the economy. In addition, the agreement provides apprenticeships and internships for students, joint training, and seminars related to computer science.
Capgemini

"Capgemini already believed in the potential of Katowice back in 2006, and today the company employs nearly 1,500 specialists. The Katowice branch consists of two prestigious office locations which mainly supply and develop modern services and IT infrastructure management for our customers with headquarters on all continents" – says Marcin Nowak, Delivery Centre Director, Capgemini Infrastructure Services EE.

Our activity in Katowice started with providing basic support for end users, but today we offer comprehensive solutions of support for IT structures, improving and developing IT technologies based on the highest standards. The Katowice location is an important place on the map of the Global Network Services, thus providing our customers with continuity of processes and effective implementation of operational and business objectives worldwide. Our competencies also include an innovative approach to IT service management, as we take responsibility for groups of IT vendors, merging a range of IT services and monitoring the level and scope of services. We participate in the most complex projects for companies in the public sector, energy, pharmaceuticals, chemicals, and finance, supporting their business needs by providing services for their operating systems at the highest level and in accordance with a model tailored to the needs of the customer.

IBM

IBM Delivery Center Poland located in Katowice started its operations in August 2013. The center provides a whole range of services including server systems operations, security services and end-user services, including maintenance and monitoring of computer hardware and software systems.

"Katowice City and Silesia region offer a huge talent base, strong educational infrastructure and supportive business environment, which are essential for our business" said Ales Bartunek, Country General Manager, IBM Poland and Baltics. The center is recruiting both – people with extensive experience as well as graduates starting their professional career. In the near future IBM will continue to work closely with local educational institutions for skill development in the region.

PwC

PwC Service Delivery Center (SDC) in Katowice was founded in 2009. Currently, the center has about 450 employees and continues to expand the scope of its activities, both in a geographical sense and through the development of our product range. SDC focuses on providing support for audit teams within PwC [PricewaterhouseCoopers network]. The services are provided in six different languages. The Center for Katowice is part of a wider global network, the so-called Service Delivery Network, which is an important component of PwC business strategy and optimization of customer services. SDC offers continuous training and professional development to its employees, in a professional, international environment.
Forecast and trends

Within CEE the SSC/BPO market has continued to grow and develop within the region. It has become more organised and mature. Growth in the sector is now coming from higher value services such as knowledge processes and R&D, especially in well-established cities.

In Poland growth in the industry is forecast to continue, coming from both new centers and expansion of already existing ones. Poland has done an excellent job in recent years of growing BPO/SSC capability beyond cities like Warsaw, Krakow and Wroclaw to emerging cities with an appetite to serve investors from the business service sector. This can be seen by the emergence of cities such as Katowice, Gdansk and Lodz along with a host of other cities who are working to make themselves counted.

Katowice has been an active player in the SSC/BPO landscape in Poland for a number of years. Katowice has a mix of BPO providers and local and international shared service centres. However there is still plenty of room for new centres to establish themselves and operate in Katowice. Katowice has access to a huge labour pool and lies in close proximity to Krakow and Wroclaw giving it access to business service specialists from two of Poland’s largest business service cities. In recent years there have been significant improvements in the infrastructure of both rail and road including highways to the airport, and investments in class A office space.

Katowice is well placed to become a prime shared service location, for both companies looking to establish their first centre in Poland, but also for companies looking to create a second business service centre in Poland. When companies are establishing a SSC/BPO and assessing locations, they should be asking themselves “how will this location look and work for my business in 4-5 years’ time”? From that perspective, Katowice is extremely well placed and should be on the list for any investor looking to a SSC/BPO.

Paul Jasniach
Director
PwC Shared Services Advisory Centre of Excellence

ABSL Regional Chapter in Katowice

The ABSL Regional Chapter in Katowice is a local action group consisting of investors representing the business services sector. The priorities of the ABSL Chapter in Katowice include supporting members of the Association in their business activities, knowledge and best practices sharing in order to achieve a favorable investment climate, and undertaking initiatives to promote the business services sector in the region.

With this end in view, the companies associated in the Katowice Chapter of ABSL actively cooperate with representatives of Katowice City Hall, Marshal’s Office of the Silesian Voivodeship, Katowice Special Economic Zone as well as local universities throughout the Silesia Metropolis.

The following companies participate in the ABSL Regional Chapter in Katowice: ArcelorMittal, Capgemini, Comarch, Cooper Standard, DisplayLink, Future Processing, Grant Thornton, Zywiec Group, HAYS Poland, IBM, ING Services, Ista, Jones Lang LaSalle, Kroll Ontrack, Manpower Group, Oracle, Proximetry, PwC, Rockwell Automation, Saint Gobain, UPC, Wipro, as well as invited individual guests representing the public administration and representatives of universities in the region.

Marcin Nowak
Head of ABSL Regional Chapter
Delivery Centre Director, Capgemini Infrastructure Services EE

Association of Business Service Leaders in Poland
Katowice is the sixth largest market in Poland and the city with the largest number of offices in the Silesia Metropolis offering a total office space of ca. 304,200 m². Around 80% of the total supply of office space in the city has been completed for lease.

It is worth noting that due to the proximity to Katowice, the supply of new office space in other cities of the Silesia Metropolis is quite limited, and at the end of the third quarter of 2013 amounted to ca. 55,000 m². Apart from Katowice, most of the existing office space is located in the cities of Chorzów, Gliwice, Bytom and Sosnowiec.
3.1 Development activity in Katowice

By the end of the 1990’s, office space in Katowice comprised mainly renovated tenements and redeveloped low-grade office buildings. The majority of the then existing office buildings were built for companies operating in the city expressly to be used for their own needs. The first office buildings intended for lease were constructed in Katowice in 2001, with the completion of Chorzowska 50 and the Millennium Plaza.

In the period from 2010 to the third quarter of 2013, office space in Katowice increased by approximately 90,950 m², located in 16 buildings. The largest objects commissioned in this period include: The Francuska Office Center (parts A and B), Katowice Business Point, the New Katowice Business Center, the Reinhold Center (parts A and B), or the GPP Business Park I. The commercialization process in the above-mentioned buildings [except for the New Katowice Business Center] accelerated only upon commissioning of the buildings, and in the case of part B of the Francuska Office Center only when approx. 70% of Building A had been leased, that is, almost two years from the time the building permit had been obtained for the investment. This was mainly due to the downturn observed in the Polish real property market.

Currently the city of Katowice is well prepared to meet the demands of tenants in terms of availability of office space. This applies to companies that are just starting their business in the city, as well as those that already exist here and are looking for larger offices.
Currently, 78,300 m² of the office space is in development, of which 5.5% will be commissioned within 2013. Such buildings as the Silesia Business Park I&II (21,340 m²), A4 Business Park I&II (17,800 m²), GPP Business Park II&III (15,000 m²) or the Silesia Star I (12,700 m²) are currently under construction.

Further development plans include such office projects as: Silesia Star II (11,000 m², developer – LC Corp), A4 Business Park III (12,100 m², developer – Echo Investment), Silesia Business Park III&IV (next 21,340 m², developer – Skanska) and further stages of the GPP Business Park (7,500 m², developer – Górnośląski Park Przemysłowy).
OFFICE SPACE MARKET IN KATOWICE AND THE SILESIA METROPOLIS

3.2 Location of office space in Katowice

Office facilities in Katowice are concentrated in the following areas:

**The City Center** – bordered by Rynek, Korfantego Avenue, Sokolska, Chorzowska and Roździeńskiego streets. The supply of office space in the area is 127,450 m², which is approx. 42.5% of the total resources of the city. The largest office developments in the area include:

- 19. Katowice Business Point,
- 21. New Katowice Business Center,
- 5. Chorzowska 50,
- 8. Altus,
- 6. ING Bank Śląski office building,
- 2. Citi Handlowy office building,

**The A4 highway area** – this area is the second largest district in terms of office space with resources at the level of 110,350 m² (36.7% of the existing office space in the city). It is bordered by Graniczna, Francuska, Mikołowska and Powstańców Śląskich streets, providing easy access to the A4 highway and the city center. The main office investments at this location include:

- 7. Millennium Plaza,
- 15. Atrium,
- 10. PKO BP office building,
- 4. mBank office building,
- 19. Francuska Office Center [sections A and B].

The area to the north to the Gen. Jerzego Ziętka round-about – this is a small office area concentrating 9.5% [28,600 m²] of the city’s resources. The largest office investments in the area include:

- 17. Reinhold Centre,
- 22. GPP Business Park.

The south-western city area – the area bordered by Ligocka, Gawronów, Kolejowa and Tadeusza Kościuszki streets. The office resources here are largely confined to the Euro-Center office complex [7 existing buildings and a total of approximately 19,000 m²]. In total, this area contains 6.3% of the total existing stock of the city (21,700 m²).

The eastern city area – the smallest office district with a supply of approx. 15,000 m² (5%).

3.3 Demand for office space in Katowice

The demand for office space in Katowice comes, for example, from foreign investors who have chosen to operate in the Katowice Special Economic Zone, and from companies in the business services sector [BPO/SSC]. During 2006-2008, the city registered strong occupier demand for new office space, however, along with the deterioration of the economic situation at the end of 2008 and in 2009, both tenants and developers were cautious about decisions about renting new office space [in the case of tenants] and making new investments [in the case of developers].

Q1, Q2 and Q3 2013 were characterized by relatively high activity on the part of tenants who rented a total of approximately 49,500 m² of office space [which represents 96% of the total demand recorded throughout 2012]. More than 81% of the contracts come from new business [including pre-let agreements] combined in most cases with the relocation of the tenant or the start of that company’s operations in the city. The largest transactions during this period were concluded by: IBM [pre-let and a new contract, respectively 8,700 and 3,200 m²], Polski Koks [6,157 m² for their own use], a financial institution [6,000 m² for their own use], ING Services Poland [pre-let of 5,600 m²], and Unilever – Ultra Logistik [an expansion by 1,935 m²].
OFFICE SPACE MARKET IN KATOWICE AND THE SILESIA METROPOLIS

The existing office buildings
1. Energomontaż
2. Citi Handlowy office building
3. Plus Centrum
4. mBank office building
5. Chorzowska 50
6. ING Bank Śląski office building
7. Millennium Plaza
8. Altus
9. Atal
10. Bank PKO BP office building
11. Opolska 22 [A,B,C,D,E,F]
12. Browar Factory Centrum
13. NBP office building
14. Euro-Centrum I-VII
15. Green Park I-III
16. Atrium
17. Reinhold Center A&B
18. GTC Francuska A&B
19. Katowice Business Point
20. Opal Gliwicka
21. Nowe Katowickie Centrum Biznesu
22. GPP Business Park I
23. Polski Koks HQ

Office buildings under construction
1. Euro-Centrum VIII - Green Building
2. A4 Business Park I&II
3. Silesia Business Park I&II
4. Brynów Center I
5. GPP Business Park II&III
6. Silesia Star I

Planned roads

FIGURE 13
Map of office space in Katowice
Source: Jones Lang LaSalle
Along with the increasing availability of office space, both the city of Katowice and the agglomeration as a whole are increasingly seen as an attractive location for companies in the business services sector. At the end of the third quarter of 2013, the city boasted 6 office modules over 1,000 m² in existing buildings and 5 projects under construction. Tenants are thus provided with perfect rental options.

Tenants usually choose Katowice after analyzing such factors as the office space rental costs and labor costs, also taking into account that the city has direct access to over 2 million residents in the wider area of the Katowice agglomeration and has a strong position as an academic center.

At the end of the third quarter of 2013, the vacancy rate in Katowice was 8.5%, which translates into approximately 25,900 m² available in existing buildings. Another 54,400 m² is available for lease in office buildings which are currently being developed.

Rents in office buildings

The highest rents for office space in recent years underwent strong pressure and at the end of the third quarter of 2013 declined to approximately EUR 12.50-13.50 / m² / month.

Rental rates in Katowice are slightly lower than those of most major Polish cities. This is obviously beneficial to tenants. Taking into account all the possible incentives offered to tenants, effective rents are approximately 10-20% lower than the base rents. As a result of improving market conditions for developers, effective rents in Katowice have begun to increase slightly since the third quarter of 2013.

Conclusions and forecasts

Due to moderate supply in the fourth quarter of 2013 (4,300 m²) and the stable level of demand predicted for office space, it is estimated that by the end of 2013 the vacancy rate may have decreased. However, developers reckon that, by 2014, the Katowice office market will be able to supply almost 50,600 m² of new office space, which in turn may put an upward pressure on the vacancy rate.
Students’ degree of knowledge of the German language, related to the history and tradition of the region.

The highest declared knowledge of the French language among students in the major Polish cities (15%)

In the academic year 2011/2012, more than 700 students in the Silesia Metropolis benefited from EU grants under the Erasmus exchange program

A total of 714 students took advantage of the Erasmus scholarship in the academic year 2011/2012. The most popular target country was Spain. Other destinations included: Germany, France, Italy and the United Kingdom. Returnees from similar trips often not only know the language, but also the customs of the individual countries. Moreover, their knowledge of English is above average.

FIGURE 15
The number of students declaring knowledge of selected foreign languages
Source: BKL – 2010; n = 1,744

FIGURE 16
The number of university students from the Silesia Metropolis who benefited from the Erasmus grant in the academic year 2011/2012
Source: www.erasmus.org.pl
English philology is the most popular, but the second highest number of students, i.e. 650, selected French philology, making it the largest language studies faculty of this type in Poland. Each student of Slavic language studies learns two languages from the following: Slovak, Czech, Slovenian, Croatian, Serbian, Macedonian, Bulgarian.

As with students, the most popular languages among people with professional experience are English and German. In the case of less common languages, attention should be drawn to a high level of knowledge of the Czech language, which is probably associated with the close proximity of the region to the Czech Republic.
**Students in the Silesia Province are very active in the labor market.** Almost 70% completed training or internships during their studies, and in the last 12 months, 45% of them have been employed. One of the most popular academic activities was voluntary work in foundations and associations, and in scientific circles. These types of activities allow students to develop the communication and teamwork skills desired by employers. Very often such voluntary work helps them gain their first experience in project management.

**Percentage of students who completed an internship/training during their studies**

**Percentage of students who have worked in the past 12 months**

---

**TABLE 3**

Salary overview for selected positions requiring knowledge of foreign languages (apart from English)

<table>
<thead>
<tr>
<th>GL</th>
<th>German, French, Italian, Spanish, Czech, Russian</th>
<th>Hungarian, Dutch, Balkan Languages, Scandinavian Languages</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Min</strong></td>
<td><strong>Opt</strong></td>
</tr>
<tr>
<td>Junior Accountant (1 – 2 years of exp.)</td>
<td>4,500</td>
<td>5,500</td>
</tr>
<tr>
<td>AP / AR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Junior Associate (0 – 1 year of exp.)</td>
<td>3,000</td>
<td>4,000</td>
</tr>
<tr>
<td>Customer Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Junior Specialist (no previous exp.)</td>
<td>3,000</td>
<td>3,500</td>
</tr>
<tr>
<td>IT / Technical Support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1st Line Support (0 - 1 year of exp.)</td>
<td>3,000</td>
<td>3,500</td>
</tr>
</tbody>
</table>

**Source:** Hays Poland
### TABLE 4
Salaries at selected positions (with English language knowledge) in business service centers in Katowice and in Silesia Metropolis

<table>
<thead>
<tr>
<th>GL</th>
<th>Min</th>
<th>Opt</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Junior Accountant (1 – 2 years of exp.)</td>
<td>2,800</td>
<td>3,500</td>
<td>4,500</td>
</tr>
<tr>
<td>Accountant (2 – 3 years of exp.)</td>
<td>4,200</td>
<td>4,800</td>
<td>5,500</td>
</tr>
<tr>
<td>Senior Accountant (3+ years of exp.)</td>
<td>5,000</td>
<td>6,500</td>
<td>7,000</td>
</tr>
<tr>
<td>Team Leader (5 – 15 FTEs)</td>
<td>7,000</td>
<td>8,000</td>
<td>9,500</td>
</tr>
<tr>
<td>Process Manager (up to 50 FTEs)</td>
<td>11,000</td>
<td>14,000</td>
<td>17,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AP / AR</th>
<th>Min</th>
<th>Opt</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Junior Associate (0 – 1 year of exp.)</td>
<td>2,300</td>
<td>2,700</td>
<td>3,500</td>
</tr>
<tr>
<td>Associate (1 – 2 years of exp.)</td>
<td>2,700</td>
<td>3,500</td>
<td>4,300</td>
</tr>
<tr>
<td>Senior Associate (2+ years of exp.)</td>
<td>4,000</td>
<td>4,300</td>
<td>5,000</td>
</tr>
<tr>
<td>Team Leader (5 – 15 FTEs)</td>
<td>6,500</td>
<td>7,000</td>
<td>8,000</td>
</tr>
<tr>
<td>Process Manager (up to 50 FTEs)</td>
<td>9,000</td>
<td>12,000</td>
<td>15,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer Service</th>
<th>Min</th>
<th>Opt</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Junior Specialist (no previous exp.)</td>
<td>2,500</td>
<td>3,000</td>
<td>3,500</td>
</tr>
<tr>
<td>Specialist (1+ years of exp.)</td>
<td>3,000</td>
<td>3,500</td>
<td>4,000</td>
</tr>
<tr>
<td>Team Leader (5 – 15 FTEs)</td>
<td>6,000</td>
<td>7,500</td>
<td>8,000</td>
</tr>
<tr>
<td>Process Manager (up to 50 FTEs)</td>
<td>9,000</td>
<td>12,000</td>
<td>15,000</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>IT / Technical Support</th>
<th>Min</th>
<th>Opt</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Line Support (0 - 1 year of exp.)</td>
<td>2,500</td>
<td>3,000</td>
<td>3,500</td>
</tr>
<tr>
<td>2nd Line Support</td>
<td>3,500</td>
<td>4,500</td>
<td>5,500</td>
</tr>
<tr>
<td>Team Leader (5 – 15 FTEs)</td>
<td>5,000</td>
<td>6,500</td>
<td>8,000</td>
</tr>
<tr>
<td>Process Manager (up to 50 FTEs)</td>
<td>9,000</td>
<td>12,000</td>
<td>14,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Procurement (Order Management)</th>
<th>Min</th>
<th>Opt</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Junior Specialist (0 – 1 year of exp.)</td>
<td>3,000</td>
<td>3,500</td>
<td>4,000</td>
</tr>
<tr>
<td>Specialist (1 – 3 years of exp.)</td>
<td>4,500</td>
<td>5,500</td>
<td>6,000</td>
</tr>
<tr>
<td>Senior Specialist (3+ years of exp.)</td>
<td>6,000</td>
<td>7,000</td>
<td>8,000</td>
</tr>
<tr>
<td>Team Leader (5 – 15 FTEs)</td>
<td>7,500</td>
<td>8,000</td>
<td>9,000</td>
</tr>
<tr>
<td>Process Manager (up to 50 FTEs)</td>
<td>11,000</td>
<td>14,000</td>
<td>16,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HR Processes</th>
<th>Min</th>
<th>Opt</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Junior Specialist (0 – 1 year of exp.)</td>
<td>2,700</td>
<td>3,000</td>
<td>3,500</td>
</tr>
<tr>
<td>Specialist (1 – 2 years of exp.)</td>
<td>3,500</td>
<td>4,000</td>
<td>4,500</td>
</tr>
<tr>
<td>Senior Specialist (2+ years of exp.)</td>
<td>4,000</td>
<td>4,500</td>
<td>5,000</td>
</tr>
<tr>
<td>Team Leader (5 – 15 FTEs)</td>
<td>6,000</td>
<td>6,500</td>
<td>8,000</td>
</tr>
<tr>
<td>Process Manager (up to 50 FTEs)</td>
<td>9,000</td>
<td>12,000</td>
<td>16,000</td>
</tr>
</tbody>
</table>

Source: Hays Poland
Incentives for investors

Katowice Special Economic Zone
The Katowice Special Economic Zone, the largest Polish economic zone in terms of investment and employment, offers state aid in the form of tax exemption, which is calculated on the basis of the investment cost or number of new jobs created. Medium-size enterprises are granted an additional 10% of aid, while small enterprises are granted an additional 20%.

Real estate tax exemptions
One tax break available is real estate tax exemption, constituting regional investment aid. This tax exemption in Katowice applies to real estate, or parts thereof, used for new investment that conduct economic activity in one of two sectors, i.e. services and manufacturing.

Support from the Strategic Investors Assistance Centre
> providing market analysis (e.g. workforce availability);
> preparing location specific information;
> organising investors’ site visits and holding meetings with the Mayor, regional authorities and universities;
> day-to-day support in the recruitment process.

Financial help from District Labour Office
The District Labour Office offers the following as support for investors who create new jobs: funding for internships at the employer’s workplace, subsidized jobs, full or partial reimbursement for equipment for a work-stand, and funding for training.

Employment support
Once an investor confirms it is looking to employ a number of people, the District Labor Office organises a work fair. Additionally, Academic Careers Centres in co-operation with Katowice City Hall, can organise special websites and notice boards allowing companies to advertise their job vacancies. Careers centres maintain candidate databases which can simplify staff searches.

Marketing support for investor
The city of Katowice can provide marketing campaigns about investments in Katowice. These campaigns feature outdoor advertising, online advertising (web banners, dedicated web pages, social network advertising) and press advertising.

Training facilities for investors
To make the recruitment process as smooth as possible the city of Katowice, together with the District Labour Office, offers special facilities where recruitment teams can interview candidates. Space can also be arranged intensive training courses.

Public transportation adjustment
The public transport network (new bus stops or bus lines) can be adjusted to satisfy the needs of investors, so that easy, quick and efficient transport for future employees can be secured.

Accommodation for investors’ employees
Katowice City Hall can offer apartments for strategic investors’ employees. These apartments are located close to the city centre, offer comparatively low rent and are modern and fully-furnished.
5.2 Important contacts

Strategic Investors Assistance Centre in Katowice

Scope of activity:
1. Maintaining a database of investment sites in Katowice and providing information on the conditions of investment in the city; consulting for investors and support in locating investment sites;
2. Supporting local and international investors: including negotiations with investors; cooperation in preparing necessary documents; future investment project monitoring; post-investment support;
3. Preparing the city’s investment offer and organization of investors’ meetings with city representatives of Katowice;
4. Cooperating in attracting investors to Katowice, with: Polish Information and Foreign Investment Agency (PAiIZ), Katowice Special Economic Zone Co., Silesian Investor and Exporter Assistance Center, Polish and foreign chambers of commerce, consulting companies, and other organizations acting as agents in attracting investors;
5. Providing information on foreign investments in Katowice and developing new forms of aid for investors.

Contact information:
Mateusz Skowroński
Mayor’s Proxy for Strategic Investors
Strategic Investors Assistance Centre
Katowice City Hall
ul. Warszawska 4, 40-006 Katowice, Poland
Phone: +48 32 25 93 823
Fax: +48 32 259 78 12
E-mail: pkis@katowice.eu
www.invest.katowice.eu

Silesian Investor and Exporter Assistance Centre

The services provided by the Silesian Investor and Exporter Assistance Centre include:
> service for domestic and foreign investors;
> delivering information about the region;
> delivering information about export;
> cooperating with municipalities;
> organizing conferences on investment attractiveness and economic development of the region;
> searching for both greenfield and brownfield locations for investment.

Contact information:
Tomasz Stemplewski – Director
ul. Ligonia 46, 40-037 Katowice, Poland
Phone: +48 32 77 40 978
E-mail: stemplewski@slaskie.pl
www.invest.slaskie.pl

Innovation and Technology Transfer Centre

Scope of activities:
Close cooperation between science and business services sector, which includes conducting joint research projects, implementation of the latest technical solutions in business services centers, and organization of dedicated training courses for employees. In addition, the provision of a wide range of expert services [development of analyzes, opinions, expert evaluations, feasibility studies, audits], laboratory, research and original solutions protected by law, e.g. patents, industrial designs, copyrights [such as computer programs] or know-how.

Contact Information:
Innovation and Technology Transfer Centre
ul. Jagiellońska 38A, 41-800 Zabrze, Poland
Phone: +48 32 278 75 12
Fax: +48 32 278 75 11
E-mail: citt1@polsl.pl
www.citt.polsl.pl
**Deforestation**

- **GDP – real growth rate:** 2.0% (2012 est.)
- **GDP (purchasing power parity):** $814.1 billion (2012 est.)
  - Country comparison to the world: 22
  - $797.8 billion (2011 est.), $764.7 billion (2010 est.)
- **GDP – per capita (PPP):** $20,900 (2012 est.)
  - Country comparison to the world: 69
- **Area:** 312,685 sq km
  - Country comparison to the world: 70
- **Exchange rates:** [zlotych (PLN) per US dollar] 3.27 (2012 est.)
- **Membership:** UE, NATO, OECD, WTO, Schengen Zone
- **Stock of direct foreign investment:** $243.8 billion (31 Dec. 2012 est.)
  - Country comparison to the world: 23

**Source:** based on CIA World Factbook

**Poland – key data**

Poland – key data

Source: based on CIA World Factbook
KATOWICE for a change