Katowice Agglomeration
Business Services Powerhouse

KATOWICE
for a change

ABSL

This report has been prepared for Katowice City Hall by the Association of Business Service Leaders (ABSL)

in cooperation with JLL and HAYS Poland

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Katowice City Hall

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1 | Why Katowice?

Katowice is a dynamically developing city of more than 300,000 inhabitants, located in the southern part of Poland. Katowice is also the capital of the Katowice Agglomeration[1] with a population of almost 2 million people and is an important educational, cultural and economic centre in Poland and in Central and Eastern Europe. Katowice regularly hosts the European Economic Congress, the biggest business event in this part of Europe. Thanks to suitable human resources, scientific and research facilities and the beneficial location and exceptional nature of this area, both Katowice and the Katowice Agglomeration are perfect places for the development of outsourcing centres (BPO/ITO), shared service centres (SSC) and research and development centres (R&D).

[1] 14 neighbouring cities include: Bytom, Chorzów, Dąbrowa Górnicza, Gliwice, Jaworzno, Katowice, Mysłowice, Piekary Śląskie, Ruda Śląska, Siemianowice Śląskie, Sosnowiec, Świętochłowice, Tychy and Zabrze.

Photo: Katowice City Hall

	KATOWICE	KATOWICE AGGLOMERATION
Office space (September 2014)	337,000 m²	440,000 m²
Population (2013)	304,000 16% of the population of Katowice Agglomeration	1,904,000 nearly 5% of the population of Poland
Students (2013/2014)	58,000	107,000
Graduates (2012/2013)	18,000	32,000
Number of universities	15	26

Figure 1
Katowice and the Katowice Agglomeration in numbers
Source: ABSL's proprietary analysis

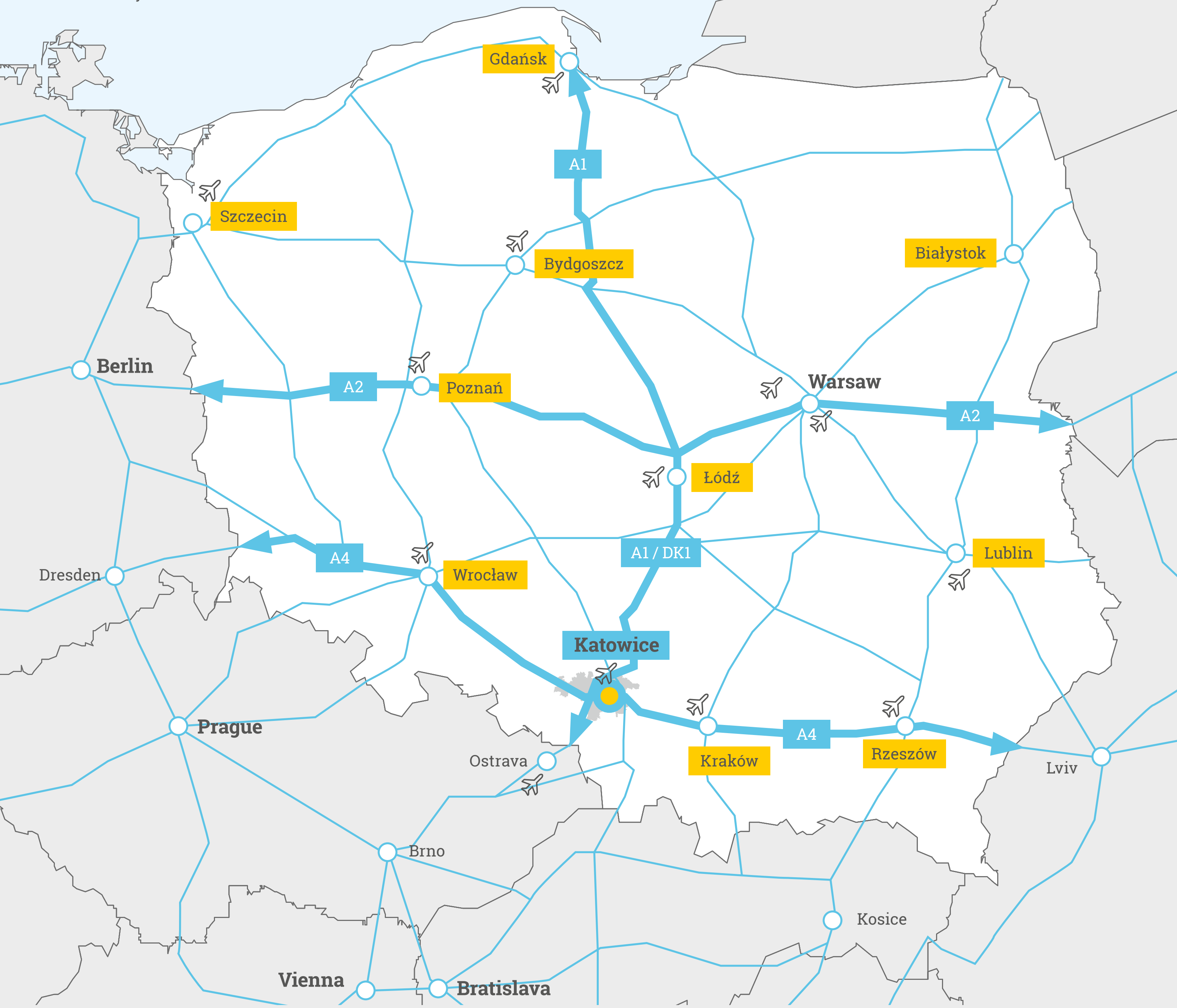


Figure 2

Location of Katowice and the Katowice Agglomeration

Source: ABSL's proprietary analysis

Location

Katowice is located in the central part of Europe between Berlin and Kraków and between Warsaw and Vienna. The city has easy access to three international airports, that is: Katowice Airport (30 km from the city centre) as well as Kraków Airport and Ostrava Airport (both within 100 km). The road (highway) and railway network is very well developed.

Table 1

Distance and estimated travel time to selected cities

	Distance from Katowice	Travel time		
		By car	By train	By plane
Warsaw	290 km	3h05min	3h00min	0h50min
Berlin	515 km	4h30min	8h03min	3h40min*
Vienna	385 km	3h50min	5h06min	4h00min*
Frankfurt am Main	901 km	8h15min	13h49min	1h30min

Source: Google Maps, Deutsche Bahn, Google Flights

** indicates flight with a stopover*

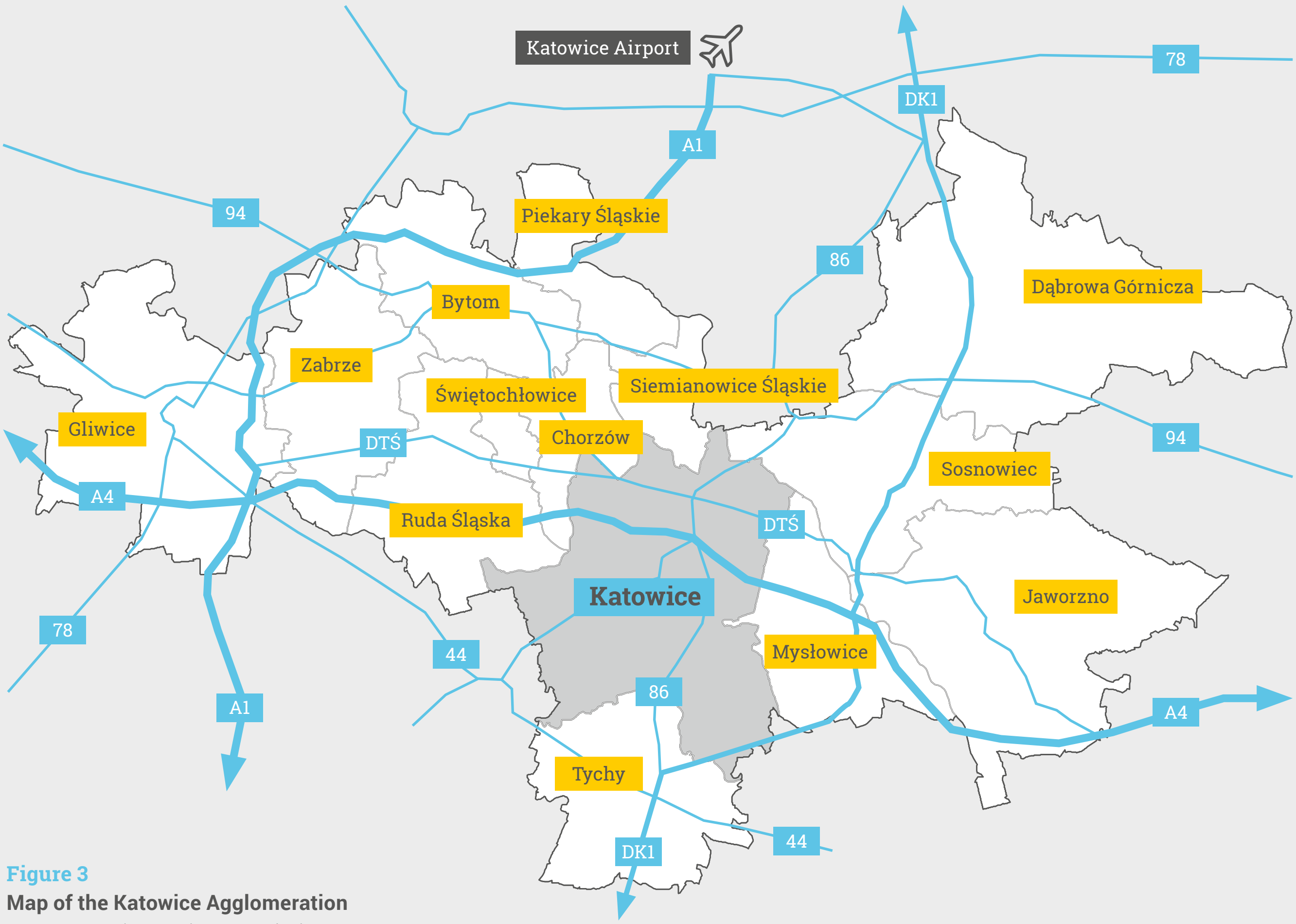


Figure 3
Map of the Katowice Agglomeration
Source: ABSL's proprietary analysis

Driving forces

The strengths of Katowice

Human capital
Good availability and quality of human resources

Investments
Dynamic growth in the number of new investors in the business service sector

BPO, ITO, SSC, R&D centres that render services for many global corporations and large Polish enterprises

Transportation infrastructure
Developed transportation system (highways, railway transportation)

Katowice Airport is the fourth largest airport in Poland in terms of the number of passengers

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

Openess and support
Local authorities favour investors

Support for development of the business infrastructure

Katowice Special Economic Zone

Office space
Katowice is the fifth largest office market in Poland with resources of

337,000 m²

Research and development facilities

There are 26 universities within the borders of the Katowice Agglomeration, characterised by different educational profiles. This ensures access to graduates from various scientific disciplines, including those essential for the development of the business service sector, i.e. the economic, financial, banking and engineering and technical fields. The major universities 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. Nearly 10% of Polish research and development potential is located here, creating the second largest research centre in Poland (after Warsaw), with more than 80 scientific and R&D units.

Transportation infrastructure

Katowice and the entire Katowice Agglomeration are served by Katowice Airport (KTW) located 30 km to the north of the city centre. It is the fourth largest airport in Poland in terms of the number of passengers (more than 2.5 million in 2013). Katowice Airport guarantees quick access to important transfer centres (e.g. Frankfurt, Munich, Düsseldorf) thereby enabling easy and fast travel, for instance to the US. There is also a local airport, Katowice Muchowiec (EPKM) that serves smaller business and regional flights. Two other international airports, Kraków Airport and Ostrava Airport in the Czech Republic, are located approx. 100 km from Katowice.
Katowice is located at the crossroads of two important international transportation routes: from Berlin (Germany) to Lviv (Ukraine) and Gdańsk (Poland) to Vienna (Austria). The city ensures convenient railway connections with other important centres: Warsaw, Wrocław, Opole, Kraków, Gdańsk and the capitals of Poland's neighbours: Berlin, Prague, Vienna, Bratislava and Kiev. Katowice's internal transportation network is very well developed thanks to highways, major roads and railway transportation. Due to investments in the transportation infrastructure, the city's transportation accessibility is improving every year.

Investment incentives

Katowice Special Economic Zone (KSEZ) gives the investors the possibility to benefit from public assistance in the form of tax exemptions (for large enterprises it is 25% of the costs of incurred), when they make investment expenditures and create new jobs. By the end of 2013, 246 companies invested in KSEZ, including companies from the business service sector.

Katowice: space for success

Awards for Katowice

In 2014, during the **5th ABSL Excellence Award**, Katowice was presented with the ABSL Excellence Award in the CITY category. Currently, Katowice is the leader when it comes to the percentage growth of employment in service centres with foreign capital in Poland.

First place in the category of **"Newcomer City of the Year"** for emerging stars of the business service sector in 2013. The Award granted during the celebration entitled *Poland Outsourcing and Shared Services Awards Gala.*

The ranking list of "The European Cities and Regions of the Future 2014/15" of fDi Magazine: Katowice was considered **to be the best city of the Central and Eastern Europe** in terms of its strategy to attract foreign direct investments, and it also took second place among the cities in Europe. Moreover, Katowice was classified as the 9th city in Europe with regards to its investment attractiveness.

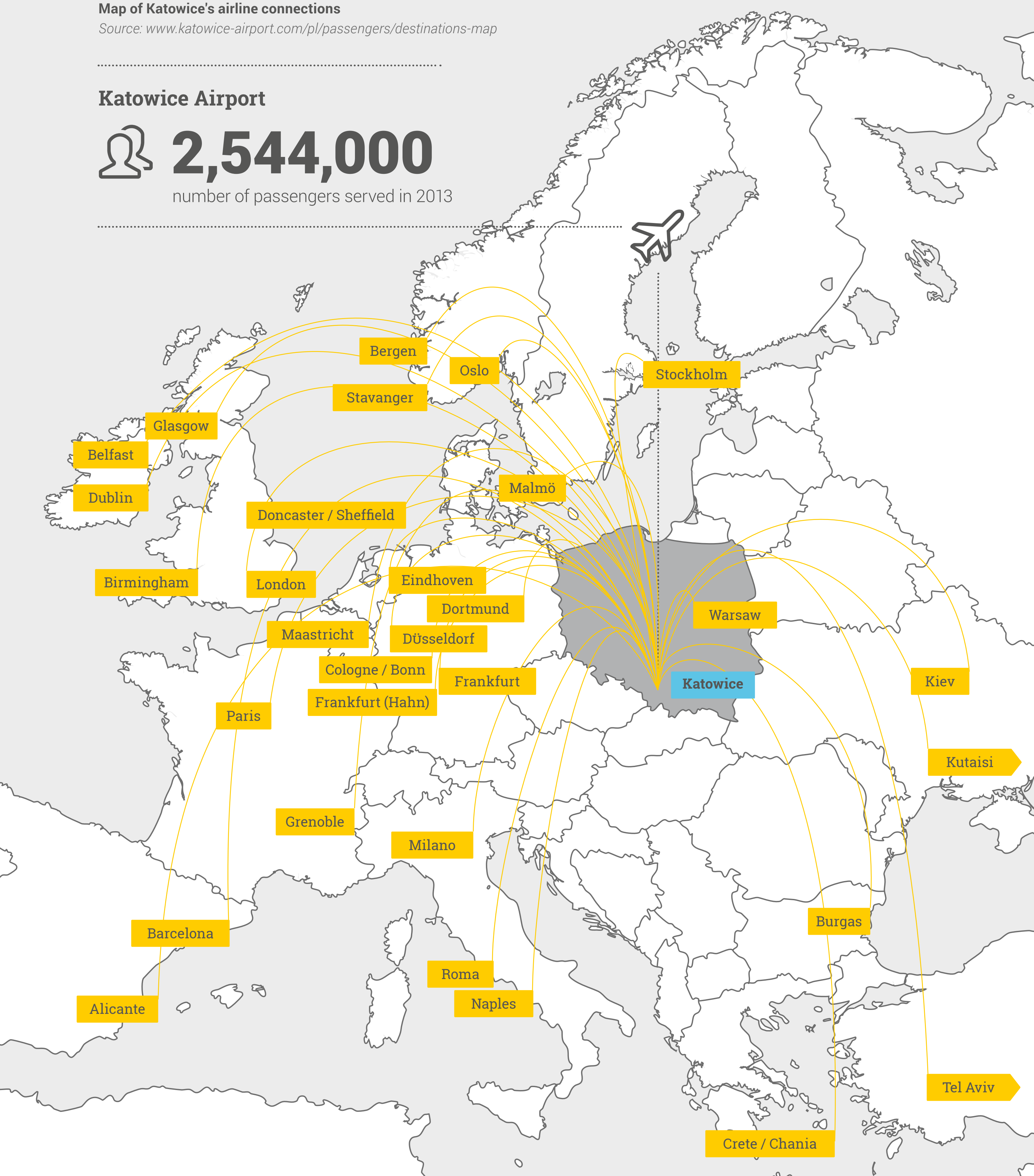
The **Friendly Commune 2013** title in the competition organised by the editor of Forum Biznesu, under patronage of the Ministry of Regional Development was granted at the conference entitled "Commune Friendly for Investors, Inhabitants and Tourists" in May 2014.

Figure 4
Map of Katowice's airline connections
Source: www.katowice-airport.com/pl/passengers/destinations-map

Katowice Airport

2,544,000

number of passengers served in 2013



2 | Business service centres in Katowice and Katowice Agglomeration

Katowice enhances its position as one of the leaders of business service centres in Poland. The dynamic growth of this sector in the Katowice Agglomeration is attracting the attention of global leading brands that have decided to locate their investments in the city. The high potential of the region also translates into the development of BPO, ITO, SSC, R&D and Contact Centres already operating in this market.

Photo: Katowice City Hall

20% Growth of employment in the business service centres in Katowice and Katowice Agglomeration (09.2013-09.2014)

Katowice

10,000
number of employees hired in business service centres

40
number of investors with their own business service centres

45
number of BPO, ITO, SSC, and R&D service centres and Contact Centres

35
number of BPO, ITO, SSC, and R&D service centres and Contact Centres with foreign capital

10
number of service centres that have been created since 2012

12,500
forecast employment in the sector as at the end of 2015

Katowice Agglomeration

15,000
number of employees hired in business service centres

57
number of investors with their own business service centres

64
number of BPO, ITO, SSC, and R&D service centres and Contact Centres

47
number of BPO, ITO, SSC, and R&D service centres and Contact Centres with foreign capital

11
number of service centres that have been created since 2012

17,500
forecast employment in the sector as at the end of 2015

Figure 5
The business service sector in the Katowice Agglomeration: key information
Source: ABSL's proprietary analysis

The Katowice Agglomeration is one of the six most important centres of business services in Poland. 64 service centres are located here, owned by 57 investors from 10 countries. These are mainly companies from the United States (15) and Polish enterprises (14), but also include corporations from the United Kingdom, France, the Netherlands, Germany, Sweden, Finland, India and Canada.

At present the service centres in Katowice and the Katowice Agglomeration employ around 15,000 people. The vast majority of them (2/3) work for entities that are partially owned by foreign capital. Polish companies have created 34% of the jobs in the sector, followed by French – 21%, American – 17%, British – 17% and 11% have been created by companies from other countries.

The vast majority of centres in the Katowice Agglomeration are located in Katowice (45 out of 64), that gathers 2/3 of the total employment in the discussed sector. The total number of service centres in the Katowice Agglomeration includes 20 shared service centres (SSC), 17 – IT outsourcing centres (ITO), 14 – customer contact centres (Contact Centres), 7 – research and development centres (R&D), and 6 – business process outsourcing centres (BPO).

Taking into account corporate development plans, it can be assumed that by the end of 2015, development in the sector will reach roughly 17,500 individuals, which is twice the number of employees compared to 2012. Moreover, this number will increase by the number of jobs generated by entities that have not yet announced their investments. The dynamic development of the business service sector in the Katowice Agglomeration is proven by the fact that the centres which started their operations in 2012-2014 have already generated 15% of the total employment in the sector. We can assume that by the end of 2015 their share will grow to approx. 20%. In general, the investments from years 2012-2014 will generate additional 1,000 new jobs by the end of 2015, the vast majority of which are to be located in Katowice.

About the report

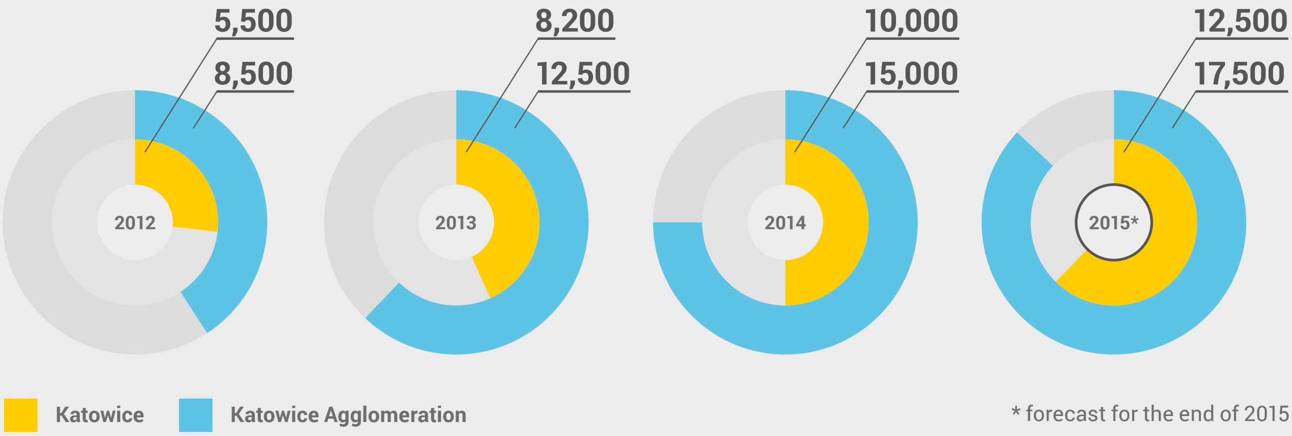
The purpose of this ABSL'S report is to present the comprehensive characteristics of the business service sector in the Katowice Agglomeration and to discuss them in the context of investors' needs, for instance, selected aspects of the labour market and the office real estate market in the area concerned.

An important element related to the preparation of this paper was obtaining information on service centres operating in the Katowice Agglomeration directly from their representatives. A questionnaire was completed by 26 respondents representing service centres that employ a total of 9,725 people in the Katowice Agglomeration, that is 65% of all employees in the sector within the analysed area. The information gathered from the questionnaire enabled a collective statistical analysis of the operations of the entities under discussion to be run (thematic analyses).

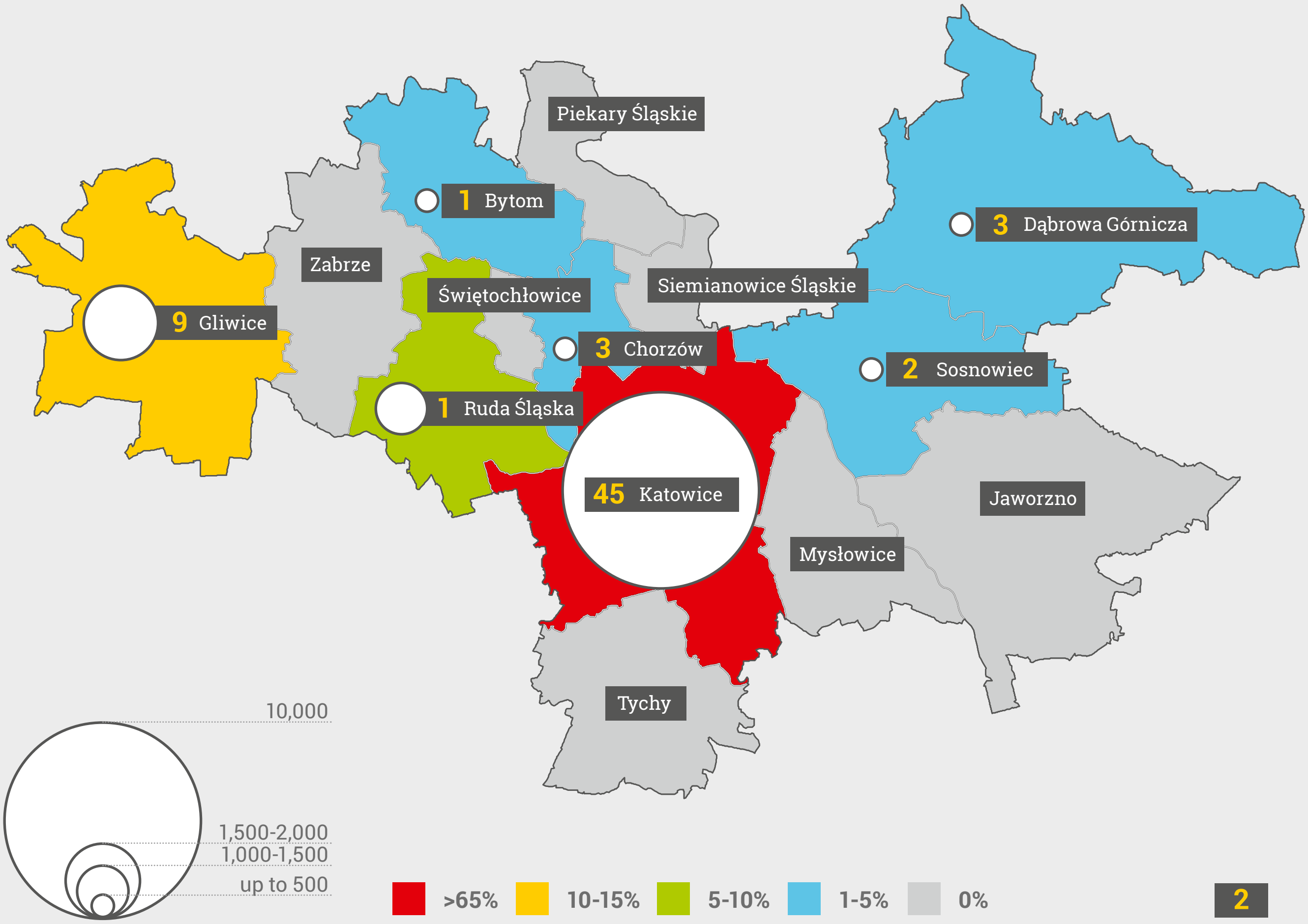
In the paper we adopted a broad definition of the sector, including research and development activities. Considerations regarding the sector were based on the analysis of service centres with foreign and Polish capital: shared service centres (SSC), business process outsourcing centres (BPO), IT outsourcing centres (ITO), research and development centres (R&D) and customer contact centres (contact centres). The category of outsourcing centres in the report does not include IT entities, for which the outsourcing of services does not account for the majority of revenue. It should be added that some centres render services for both their parent company and external customers. This is the so-called hybrid model of services. In the report mixed BPO/SSC centres were not separated but individual entities were assigned to the basic types of centres (BPO, ITO, SSC, R&D, Contact Centres) on the basis of the dominant profile of their activities.

We would like to thank all representatives of companies and institutions who took time to complete the questionnaire or prepared the information used in this report.

Business service centres in Katowice and Katowice Agglomeration



Number of employees in BPO, ITO, SSC, R&D service centres and Contact Centres



Number of employees in business service centres

Share of total employment in business service centres of a city in the Katowice Agglomeration

Number of service centres in a given city

Figure 6
The business service sector in the Katowice Agglomeration
Source: ABSL's proprietary analysis

Table 2
The business service sector in the Katowice Agglomeration

Service centre	Country	Location	Processes handled in a service centre									
			IT services (including software development)	Finance and accounting services	Project management	Human resources management	Customer services	Records management	Business transformation	Supply management	Research and development services (excluding software development)	Other processes
4EverNET	Poland	Katowice	●				●					
Aegon	Netherlands	Chorzów		●			●					
Alan Systems	Poland	Katowice	●									
ArcelorMittal	United Kingdom	Dąbrowa Górnicza		●				●				●
Barona	Finland	Katowice	●									
Bombardier	Canada	Katowice									●	
Capgemini	France	Katowice	●	●	●	●			●			
Cyclad	France	Katowice	●									
DisplayLink	USA	Katowice									●	●
Eniro	Sweden	Katowice					●					
Ericsson	Sweden	Katowice	●									
Future Processing	Poland	Gliwice	●		●							
Gallup Arteria Management	Poland	Ruda Śląska					●					
General Motors	USA	Gliwice		●								
Generali	Germany	Katowice					●					
Goyello	Netherlands	Gliwice	●									
Grant Thornton	United Kingdom	Katowice		●								
Żywiec Group	Netherlands	Katowice					●					
HireRight	USA	Katowice	●	●		●	●					●
IBM	USA	Katowice	●		●				●			●
ING Services Poland	Netherlands	Katowice	●		●							
ista	United Kingdom	Gliwice, Katowice	●	●	●							●
Jcommerce (LGBS Group)	Poland	Katowice	●									
Katowicki Holding Węglowy	Poland	Katowice	●	●		●				●		
Kroll Ontrack	USA	Katowice	●								●	
LGBS	Poland	Katowice	●									
Maximum	Poland	Katowice					●					
Mentor Graphics	USA	Katowice	●	●							●	
Neubloc	USA	Katowice	●								●	

Business service centres in Katowice and Katowice Agglomeration

Service centre	Country	Location	Processes handled in a service centre									
			IT services (including software development)	Finance and accounting services	Project management	Human resources management	Customer services	Records management	Business transformation	Supply management	Research and development services (excluding software development)	Other processes
NGA Human Resources	United Kingdom	Katowice	●		●	●			●			
OEX (Archidoc)	Poland	Chorzów	●			●		●				●
Oracle	USA	Katowice	●				●					
Orange Call Center	France	Katowice					●					
Perform Media	United Kingdom	Katowice	●	●		●	●					
Poczta Polska	Poland	Katowice				●	●	●				
Pregis	USA	Gliwice		●								
Proximetry	USA	Katowice	●								●	
PwC	United Kingdom	Katowice										●
Rockwell Automation	USA	Katowice	●	●		●				●		
Ruch	USA	Katowice		●		●						
Saint-Gobain	France	Dąbrowa Górnicza		●								
Sales Concept	Poland	Bytom					●					●
Sii	France	Katowice	●									
Sine Qua Non	Poland	Sosnowiec					●					
SMS Metallurgy	Germany	Chorzów		●								
SMT Software	Poland	Gliwice, Katowice	●									
Steria	France	Katowice	●		●	●						
Tauron	Poland	Gliwice, Katowice	●	●		●	●					●
TELE-FONIKA Kable	Poland	Katowice		●			●					
Teleperformance	France	Katowice	●				●					
Tenneco	USA	Gliwice									●	
Timken	USA	Sosnowiec					●					
Unilever	United Kingdom	Katowice		●								●
UPC	USA	Katowice					●					
Warta	Germany	Katowice					●					
Webanywhere	United Kingdom	Katowice	●									
Wincor Nixdorf	Germany	Katowice	●									
Wipro	India	Dąbrowa Górnicza		●								

Source: ABSL's proprietary analysis

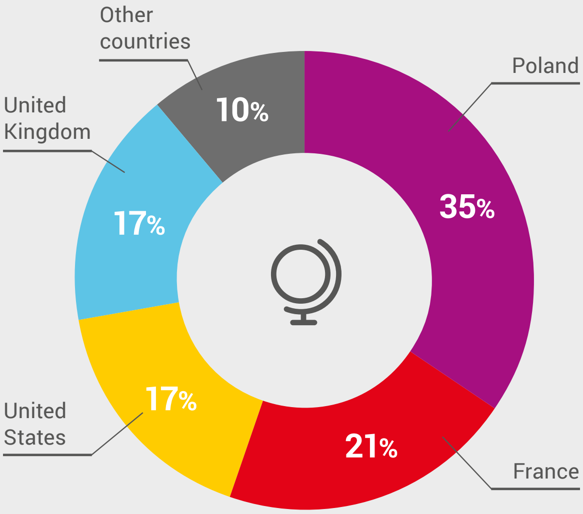


Figure 7
Employment structure of service centres in the Katowice Agglomeration based on the location of the parent company's head office
Source: ABSL's own analysis

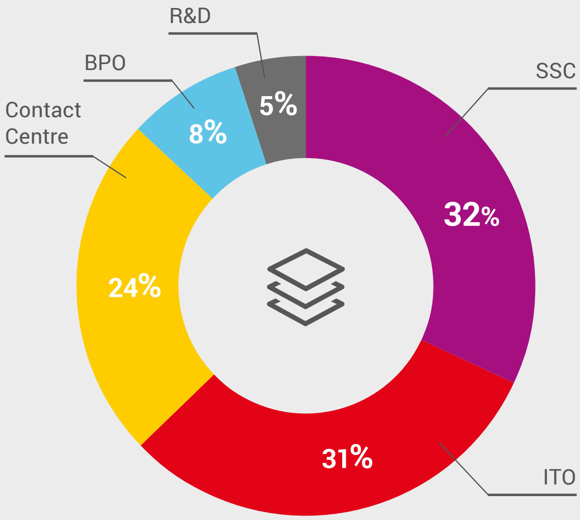


Figure 8
Employment structure of service centres in the Katowice Agglomeration by centre type
Source: ABSL's proprietary analysis

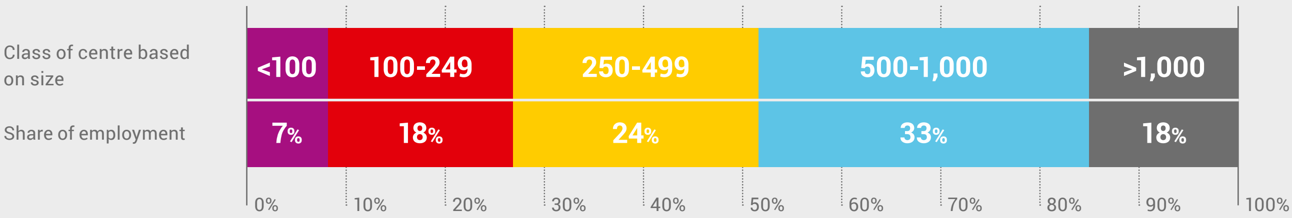


Figure 9
Employment structure of service centres in the Katowice Agglomeration classified by size
Source: ABSL's proprietary analysis

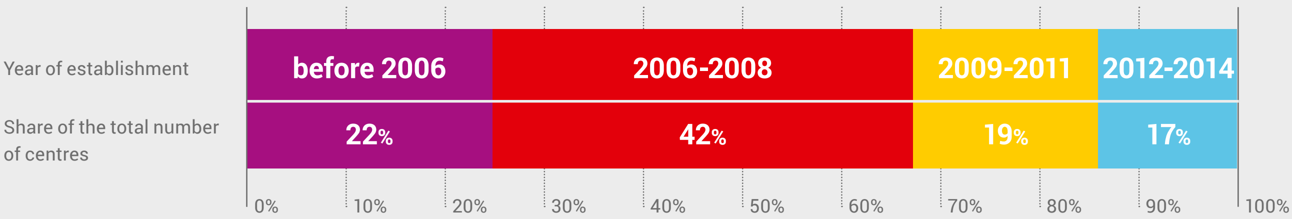
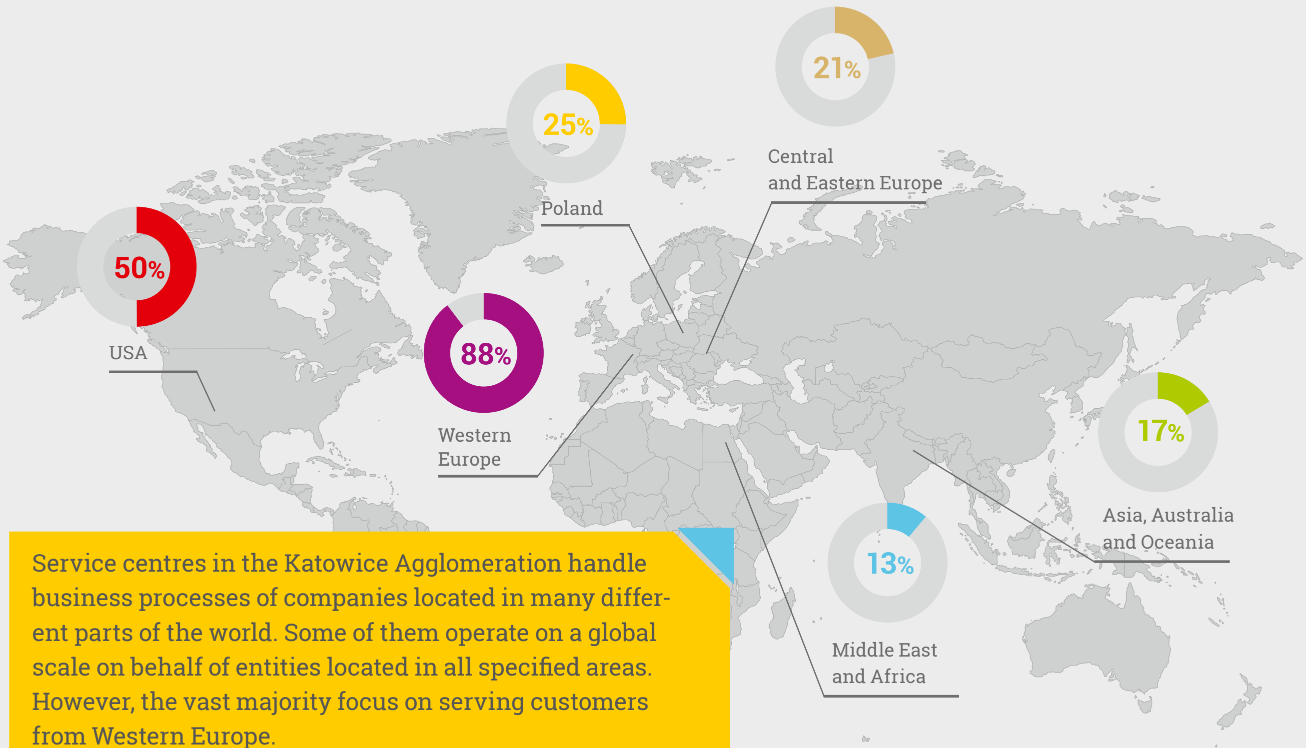


Figure 10
Business service centres in the Katowice Agglomeration by year of establishment
Source: ABSL's proprietary analysis

Type and geographic scope of services rendered by the centres



Service centres in the Katowice Agglomeration handle business processes of companies located in many different parts of the world. Some of them operate on a global scale on behalf of entities located in all specified areas. However, the vast majority focus on serving customers from Western Europe.

Figure 11

Geographic scope of services rendered by the centres located in the Katowice Agglomeration

Source: ABSL's proprietary analysis based on a questionnaire sent to the service centres [N=24 companies]

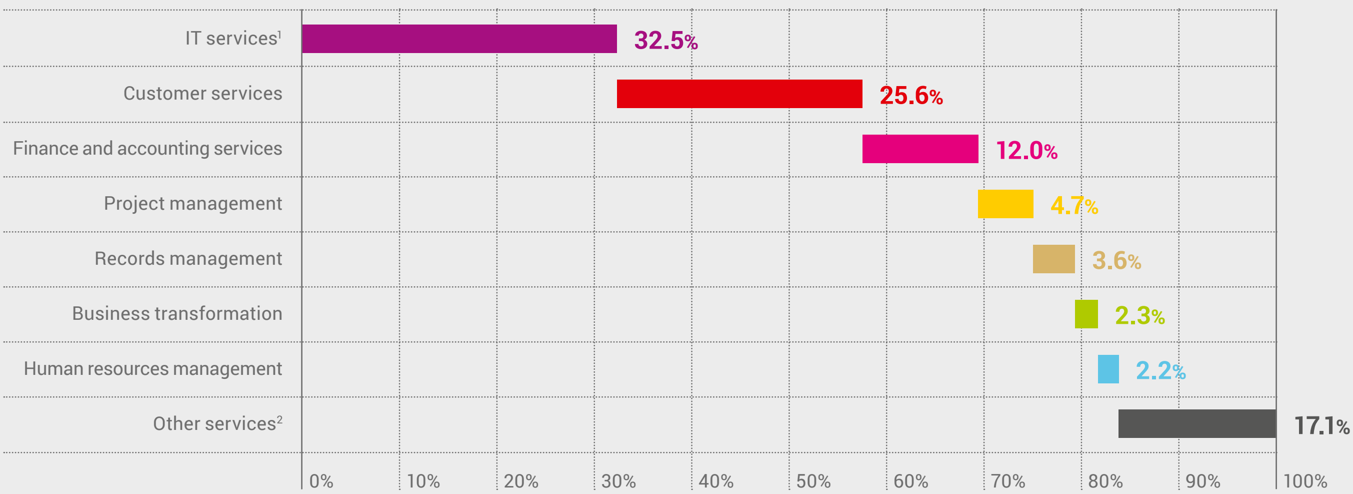


Figure 12

Employment structure in service centres by processes handled

Source: ABSL's proprietary analysis based on a questionnaire sent to service centres [N=26 companies employing 9,725 persons]

(1) including software development, (2) including financial services, audit support services, data verification services, supply management, marketing services, legal services.

Business service centres in Katowice and Katowice Agglomeration

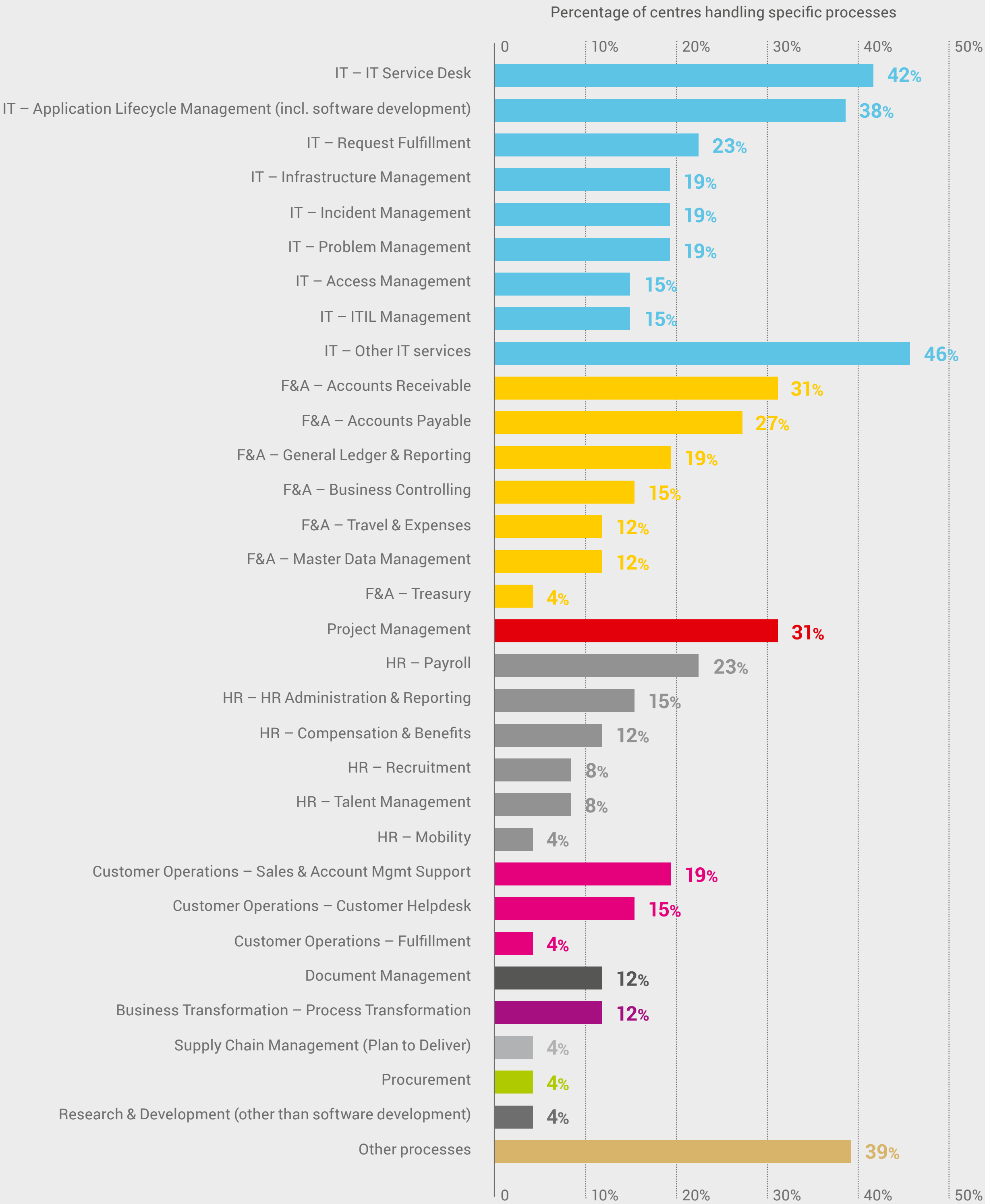


Figure 13

Processes handled in service centres in the Katowice Agglomeration

Source: ABSL's proprietary analysis based on a questionnaire sent to service centres [N=26 companies employing 9,725 persons]

Other characteristics of sectors

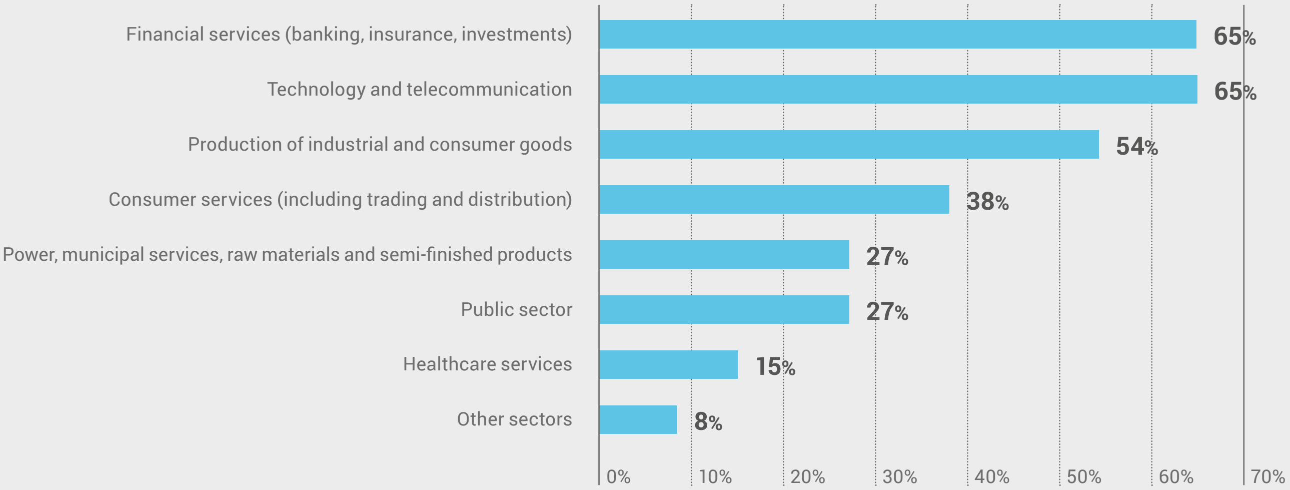


Figure 14

Sector structure of companies (external and internal customers) supported by service centres based in the Katowice Agglomeration

Source: ABSL's proprietary analysis on the basis of a questionnaire sent to service centres [N=26 companies employing 9,725 persons]

96% – percentage of centres that have developed their scope of services during the last four years

96% – percentage of centres, in which the level of rendered services has increased during the last four years

235 persons – average employment in service centres in the Katowice Agglomeration (median – 142 persons)

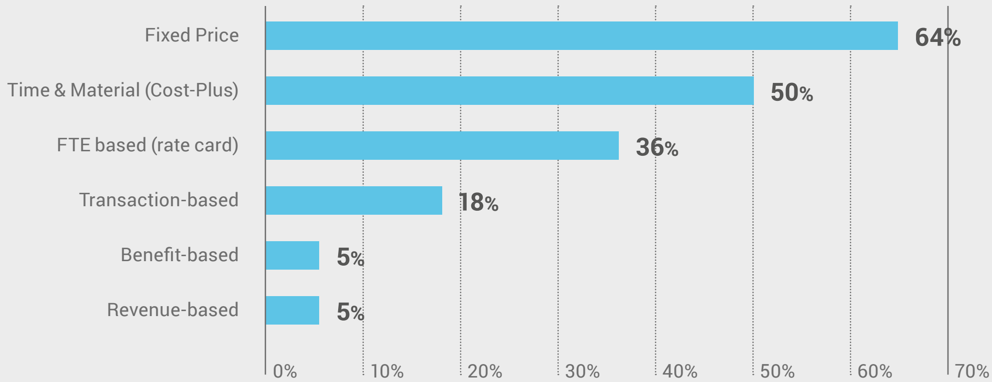


Figure 15

Settlement models in business service centres in the Katowice Agglomeration

Source: ABSL's proprietary analysis based on a questionnaire sent to service centres [N=22 companies]

Languages of services rendered by service centres

Service centres in Katowice and the Katowice Agglomeration render business services in 24 languages. These are mainly European languages. The vast majority of the centres surveyed (92%) render services in English. Many centres use in their work Polish (84%), German (60%), French (44%) and Italian language (36%). A considerable percentage of centres use other European languages, such as Czech, Dutch, Russian or Spanish. In individual cases the service centres use other languages, such as Bulgarian, Serbian, Slovenian, Turkish, Macedonian, Chinese or Hindi. Slightly more than 1/4 of examined centres use seven and more foreign languages in their work.

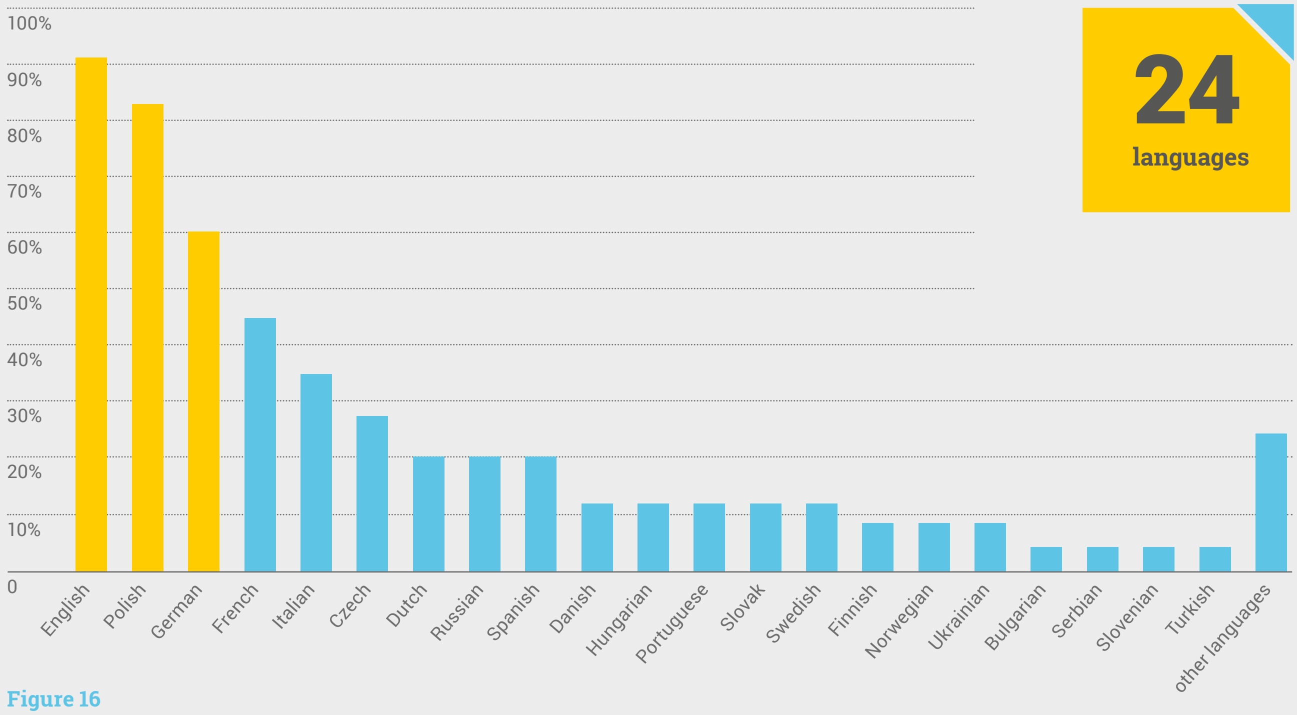


Figure 16
Languages used in service centres in Katowice and the Katowice Agglomeration
Source: ABSL's proprietary analysis on the basis of the questionnaire sent to service centres [N=25 companies]

Development plans of service centres

The vast majority of centres in Katowice and the Katowice Agglomeration plan to introduce changes in the scope of their business during the next two years. They want to add more operations and acquire new customers (64%) or acquire new customers without changing the scope of rendered services (24%). Small percentage of companies (12%) want to focus on stabilisation and optimisation of their current activities.

More than 1/3 of analysed companies (36%) have already precise plans concerning extension of their activities to other locations. 40% of examined entities have no plans to develop their activities to other localisations, and 24% companies have not decided about it.

Table 3
Plans of service centres concerning the expansion of operations within one to two years

Expansion of operations – new operations, new customers	**64%**
Expansion of operations – the same operations, new customers	**24%**
Stabilisation and optimisation of current activities	**12%**

Source: ABSL's own analysis on the basis of the questionnaire sent to the services centres [N=25 companies]

Employee benefits offered by service centres

All service centres analysed in Katowice and the Katowice Agglomeration offer benefits to their employees. The most popular benefits are medical package and sport cards (84% each). A large amount of companies have a possibility to co-fund language courses (68%) and sport activities (60%). More than a half of companies offer life insurance (56%), or they offer to co-fund university studies, postgraduate studies or any type of specialist courses (52%) to their employees.

Less popular employee benefits are: recreational trips or activities (24%), additional health insurance (other than a medical package) (20%), purchase of shares on preferential conditions (12%) and pension fund (8%). It should be added that 28% of companies use cafeteria benefit plans. In some cases the right to use selected employee benefits depends on the positions of the employees concerned.

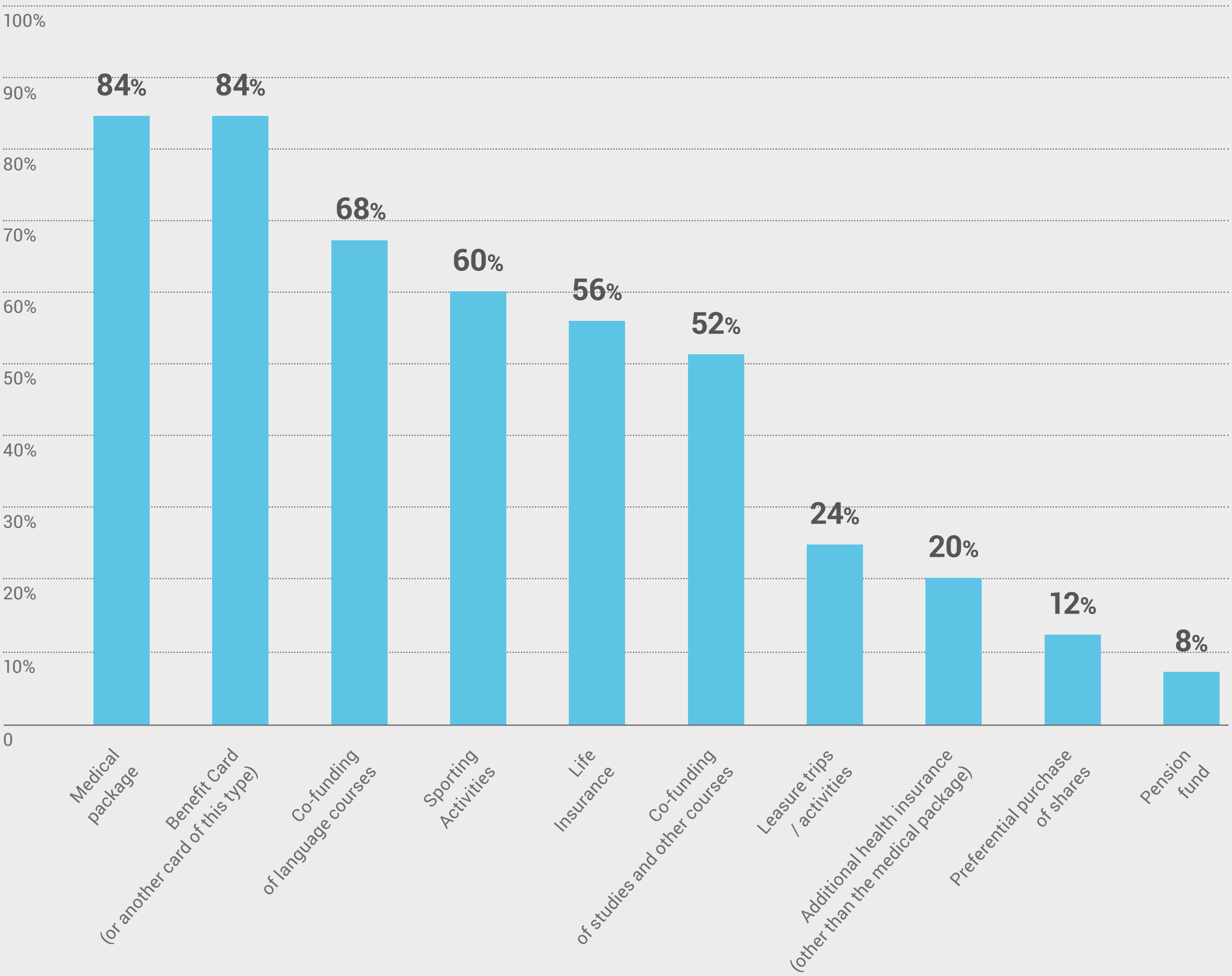


Figure 17

Employee benefits offered by service centres in Katowice and the Katowice Agglomeration

Source: ABSL's proprietary analysis based on a questionnaire sent to the service centres [N=25 companies]

Evaluation of the location of the business activity

In a questionnaire-based study, representatives of service centres were asked for their opinions on the qualities of the Katowice Agglomeration as a business location. All of the area's analysed qualities were assessed positively. The availability of means of transportation was rated highly: almost all respondents assessed it as good to very good (the average grade was 4.3 on a 5-point scale). Respondents also positively assessed the following: the availability of highly-qualified staff (80% positive grades, average grade: 4.0), availability of modern office space (72% of positive grades, average grade: 3.8) and cooperation with local authorities (67% positive grades, average grade: 3.8). According to the representatives of companies, the quality of public transportation in the Katowice Agglomeration may be assessed as above average (68% of positive grades, average grade: 3.6), and the perception of the region by investors is profitable (56% of positive grades, average grade: 3.6).

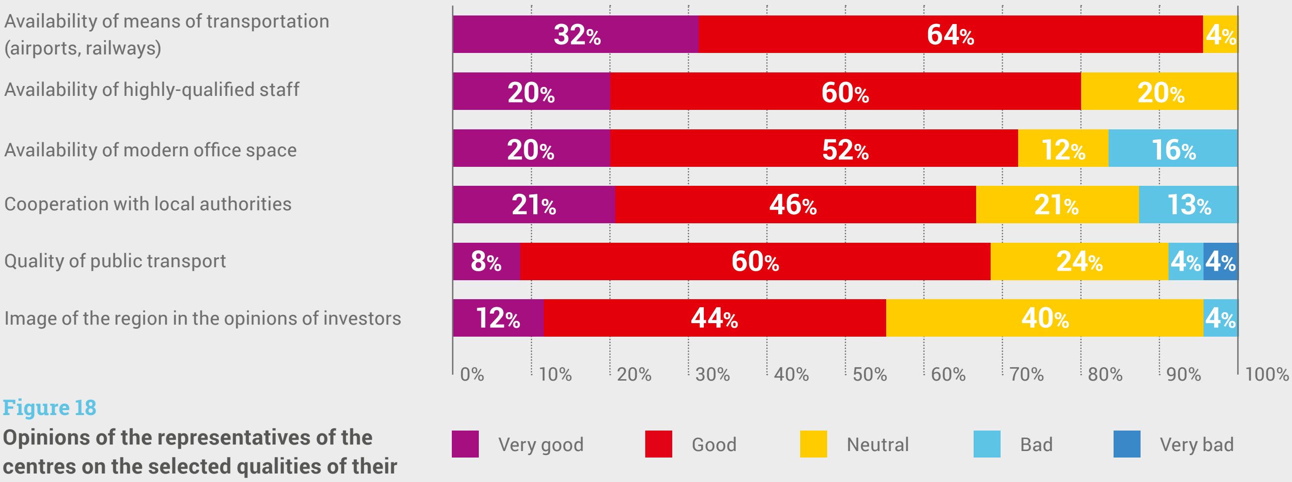


Figure 18

Opinions of the representatives of the centres on the selected qualities of their companies' locations

Source: ABSL's proprietary analysis based on a questionnaire sent to service centres [N=25 companies]

Representatives of the centres assess that the competition among BPO, ITO, SSC, R&D and contact centres in the Katowice Agglomeration is quite strong, and its average grade amounts to **7.13** (on a 1-10 scale).

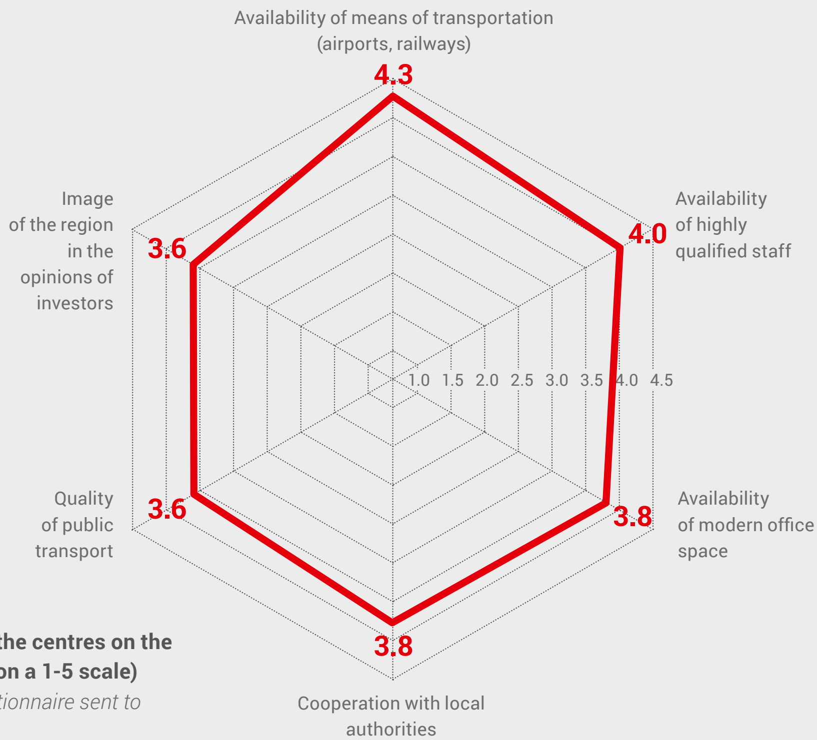


Figure 19

Average grades given by the representatives of the centres on the selected qualities of their companies' location (on a 1-5 scale)

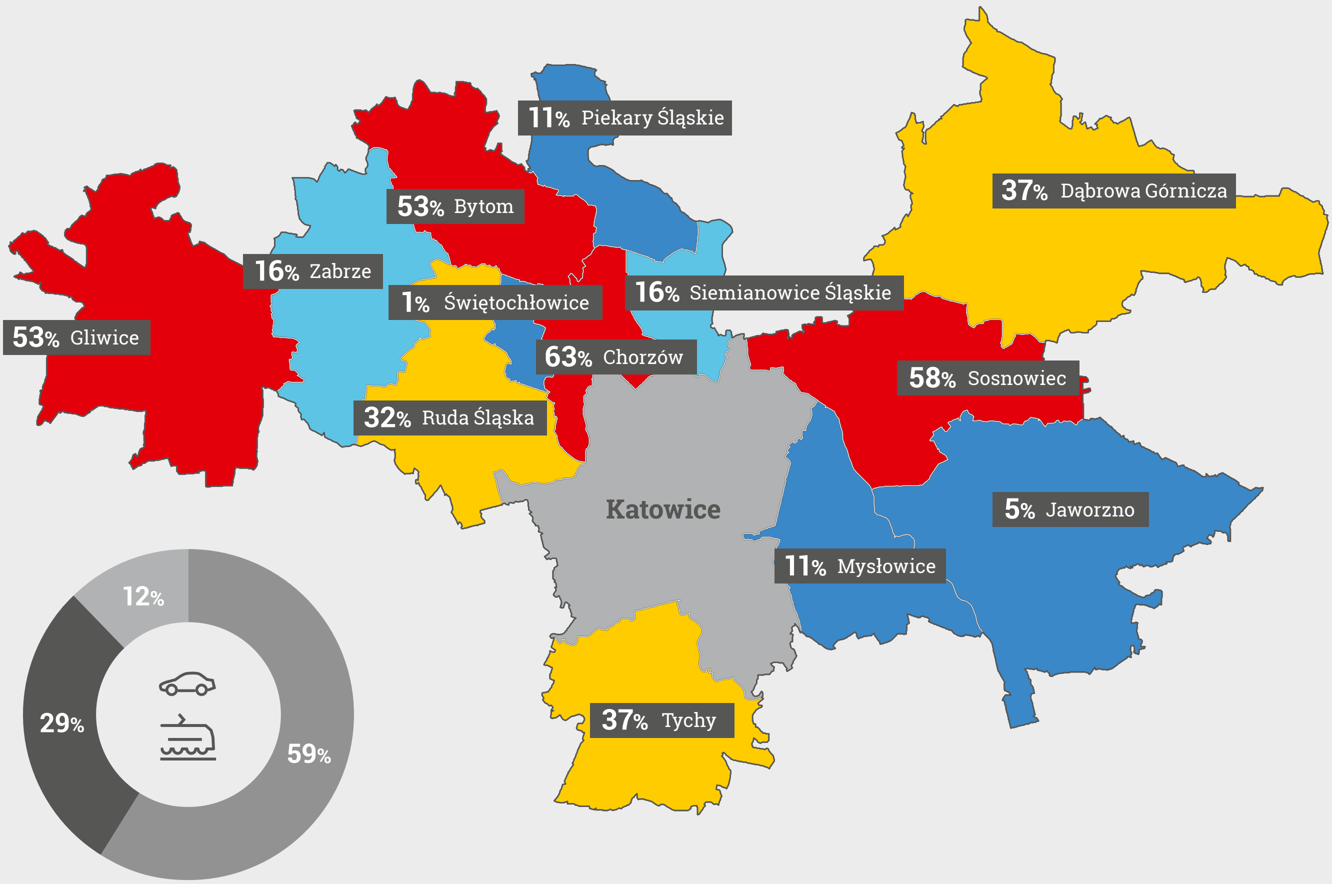
Source: ABSL's proprietary analysis based on a questionnaire sent to service centres [N=25 companies]

Commuting to Katowice

The majority of employees of the surveyed service centres in Katowice are commuters from other cities (61% on average). This is proof of the high spatial mobility of the inhabitants of the region and also of the well-developed road network and municipal transportation in the Katowice Agglomeration. At a significant majority of the surveyed centres, commuters to Katowice from other cities in the region accounted for 50% to 75% of the staff.

The commuting zone for service centres located in Katowice is quite extensive. Employees commute to Katowice both from cities located in the Katowice Agglomeration and from more distant centres, such as Rybnik or Kraków.

Centres located in other cities of the Katowice Agglomeration have smaller commuting areas (most often covering 3-4 cities). They usually receive commuters from adjacent cities.



>75% 50-75% <50%

Percentage of employees commuting to centres in Katowice from other cities (N=17)

<15% answers: Kraków, Rybnik and other cities outside the Katowice Agglomeration

>50% 30-50% 15-29% <15%

Figure 20
Percentage of answers from service centres located in Katowice mentioning specific cities from which their employees commute
Source: ABSL's proprietary analysis based on a questionnaire sent to service centres [N=19 companies]

Relationships of service centres with universities

Business service centres operating in Katowice and the Katowice Agglomeration cooperate with universities. They offer internships and vocational trainings for students, participate in work fairs, and organise information days and series of workshops and lectures. They develop the knowledge and skills of university students, postgraduate students and research staff, and they also look for future employees. They cooperate with university organisations such as student research groups and career offices as well as with organisations operating at the universities (e.g. the Innovation and Technology Transfer Centre operating at the Silesian University of Technology).

The universities based in the Katowice Agglomeration enter into cooperation agreements in respect to organisation of vocational trainings and internships for their students with different companies, including the business service centres. For instance, the Silesian University of Technology has signed such agreements with the following companies, e.g. Future Processing, General Motors, ING, Jcommerce, LGBS Software, Omnis, Saint-Gobain, Tenneco, Timken. Thanks to this cooperation with companies, while still studying, students can obtain first professional experience in the sector, and the service centres may attract future employees.

This cooperation of service centres with universities takes various forms. First of all, companies try to attract future employees (75%). They cultivate the development of their competencies and skills, organising conferences (33%), trainings and courses (29%), educational projects (29%), and studies (21%) or conducting research projects in cooperation with universities (8%). 1/4 of the surveyed service centres do not cooperate with universities.

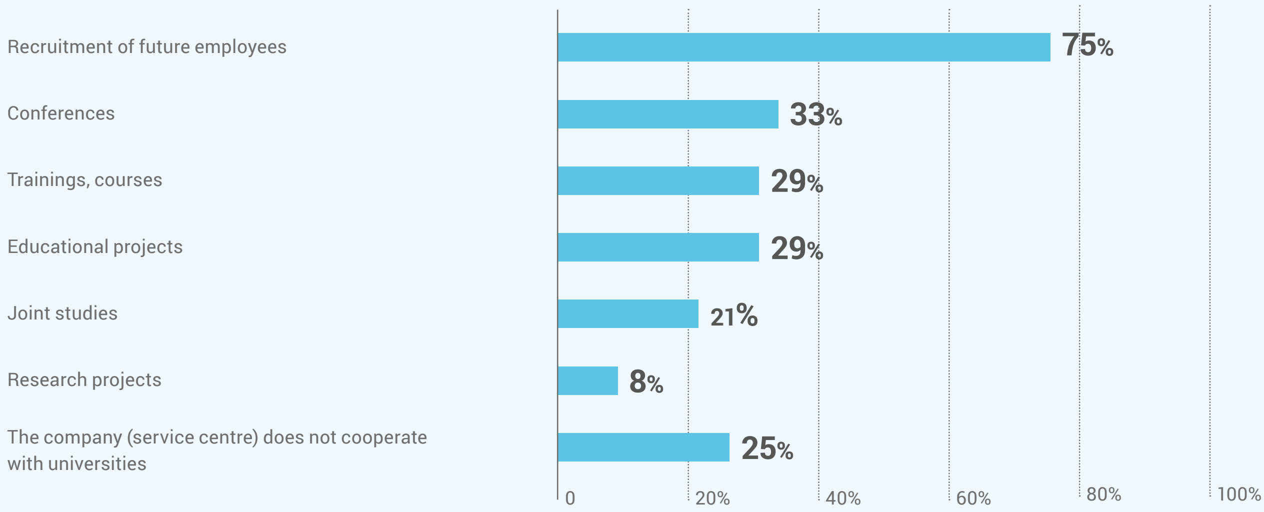


Figure 21
Forms of cooperation between service centres and universities
Source: ABSL's proprietary analysis based on a questionnaire sent to service centres [N=25 companies]

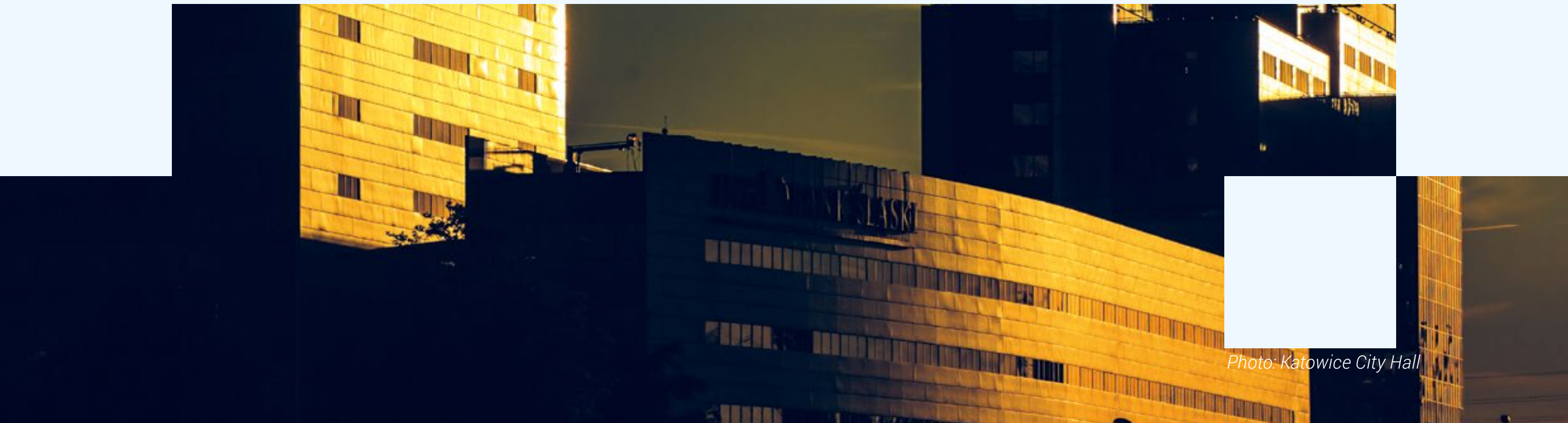


Photo: Katowice City Hall

Company	Examples of actions undertaken within the framework of cooperation with the universities in the Katowice Agglomeration
Capgemini	» Cooperation for instance with the University of Silesia, the Silesian University of Technology, the University of Economics in Katowice, the Katowice School of Economics, the Silesian School of Management. » The ambassador programmme for 2nd, 3rd and 4th year students of the University of Economics in Katowice and the University of Silesia, which, for example, offers paid vocational placements in Capgemini as well as participation in training courses. The Company's ambassador takes part in a paid placement for 2-3 months (in Katowice in the department of Business Process Outsourcing and Infrastructure Services), and then he/she cooperates with Capgemini for the next 10 months. » Organisation of training courses, lectures and industry events, e.g. Career Meetings with Capgemini Software Solutions Center for IT students and students of related subjects interested in work in IT sector.
Future Processing	» Cooperation with the Silesian University of Technology in Gliwice and with the University of Silesia. » Funding two computer laboratories at these universities. » Vocational training, internships, seminars and training for students. » Organising a cycle of workshops and lectures entitled "Good Practices of Software Development" within the framework of the FP Academy. A project addressed to the students of the Silesian University of Technology and the University of Silesia. » Preparation of the programme and conducting a course entitled "Development of Software in Variable Business Environment" (for IT students of the Silesian University of Technology), devoted to software development as a solution of a business problem.
IBM	» Cooperation for instance, with the Silesian University of Technology in Gliwice, the University of Silesia, the University of Economics in Katowice, the Katowice School of Economics, the Silesian Business School in Dąbrowa Górnicza. » Workshops organised for the students of the University of Economics in Katowice about Big Data and business analytics using IBM's state-of-the-art technology and software. » Programmes of vocational placements for university students, postgraduate students and research staff, e.g. in the form of Cloud computing (virtual training the cloud) and IBM certificates for the universities' research staff. » Providing the universities with access to software and didactic materials. » Special teaching programmes for students: Corporate Readiness Certificate. This is a project that links the world of business with the world of science. The undertaking was initiated by three important companies at the market: IBM Polska, ING Services Polska, ING Bank Śląski and the University of Economics in Katowice. In this project students had the opportunity to develop their knowledge and obtain new, practical skills related to IT project development and management. The first edition of the project ended on 17 June 2014.
ING Services	» Cooperation with the University of Silesia, the University of Economics in Katowice, and others. » In cooperation with the Career Office of the University of Silesia, the interneship project for programmers entitled "Career Programming – Support for Young People at the Labour Market": course on online application programming and 6-months' internship in organisations that employ programmers. » Organising meetings with students and graduates. » Organisation of the Corporate Readiness Certificate Programme with IBM Polska, ING Bank Śląski and the University of Economics in Katowice.
PwC	» Cooperation with the University of Economics in Katowice and other universities. » Educational activities (workshops, presentations, meetings with students). » Annual ambassador programme for students. » Offers of vocational training and internships for students and graduates. » Organisation of a competition entitled "Grasz o staż" ("Win a training") for students. It is a nationwide competition in which students may win paid content-related trainings in many companies, also from the sector of business services. » WEX vocational training programme for first-year students in the company's main and local offices. First professional experience, training. The best trainees have the opportunity to participate in shortened recruitment process in the company. » A competition entitled "Experience PwC" for students of the last years and graduates – October/November 2014. Anniversary edition. The competition gives the student a chance to face real problems encountered by PwC's employees.

Source: ABSL's proprietary analysis based on the websites of individual companies

3 | Labour market

Katowice is the city of young and educated people with very good knowledge of foreign languages who are ready to face challenges set for them by employers from the business service sector. More than 107 thousand students study at universities located in the Katowice Agglomeration. Ca. 32 thousand graduates with a variety of first-rate skills enter the labour market every year.

Photo: Katowice City Hall

LABOUR MARKET

Katowice

18,000

number of university graduates in Katowice (2012/2013)[1]

58,000

number of university students in Katowice (2013/2014)[1]

Katowice Agglomeration

32,000

number of university graduates in the Katowice Agglomeration (2012/2013)[1]

107,000

number of university students in the Katowice Agglomeration (2013/2014)[1]

Knowledge of foreign languages[2]

English	90.0%
German	43.8%
Russian	27.5%
French	14.3%
Spanish	11.6%
Italian	11.9%

The sample consists of individuals with university education who have recently looked for a job. The result represents claimed knowledge of a foreign language at least basic level. (n = 15,500 persons)

61% Percentage of employees of the analysed service centres in Katowice commuting from other cities[3]

Figure 22
The labour market in Katowice and the Katowice Agglomeration
Source: (1) data of the Central Statistical Office of Poland, (2) data of HAYS Poland, (3) ABSL data

Human capital

In the Katowice Agglomeration students have a chance to acquire knowledge and develop the skills necessary to become qualified employees in the business service sector in the future. They study, for instance, economic and administrative subjects, IT or engineering and technical subjects.

Many students choose courses of study connected with foreign languages. At the University of Silesia 6,251 students study at the Philological Faculty (02.2014), including (in academic year 2013/2014) 3,872 studying foreign philology. The largest number of students selected English philology. It should be noted that the second most popular language was Russian.

In Katowice there is an international school offering three levels of education: primary, lower secondary and upper secondary (ending with international exam) that gives residents an opportunity to learn languages and enhance their future attractiveness on the labour market at every level of education. Moreover, the 3rd Comprehensive Secondary School in Katowice teaches according to the International Baccalaureate Diploma Programme.

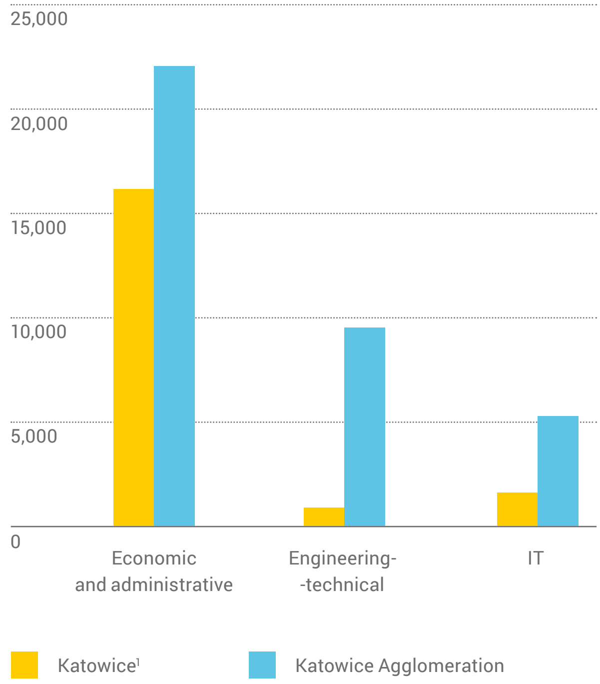


Figure 23

Number of students at economic and administrative, IT and engineering and technical faculties in the subregion of Katowice and the Katowice Agglomeration (2013/2014)

Source: ABSL's proprietary analysis based on data of the Central Office of Statistics

(1) including Mysłowice, Chorzów, Ruda Śląska, Świętochłowice and Siemianowice Śląskie

> Almost every student in Katowice states that he/she knows English (96% students). Almost half of the students (45%) state that they speak German (BKL 2011, 2013, N=3,039).

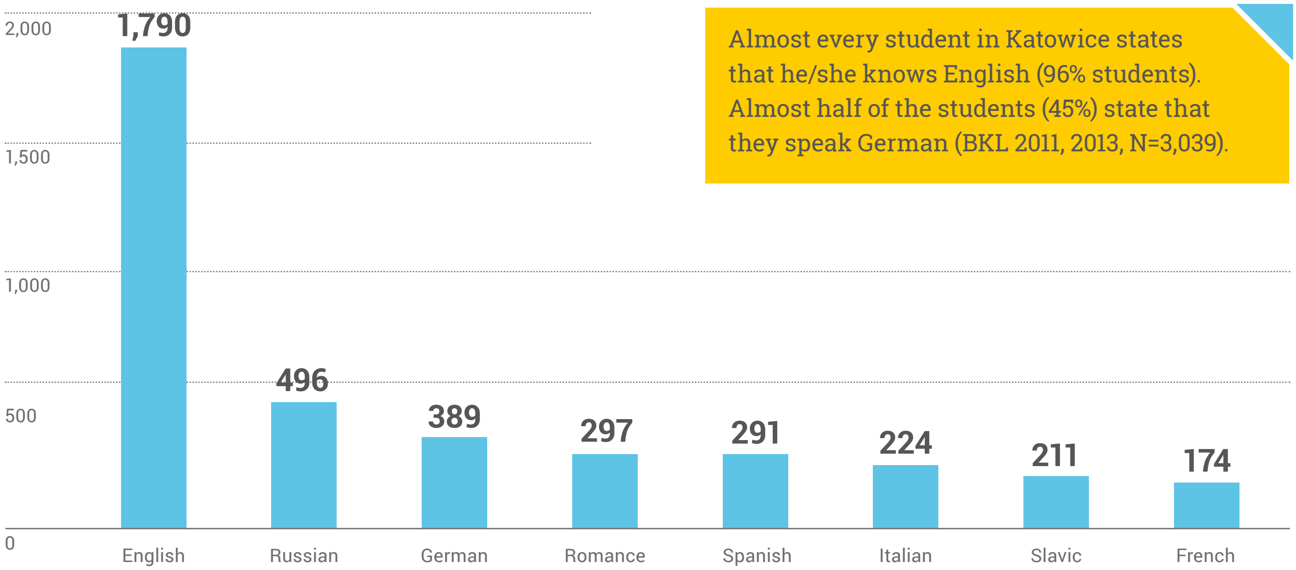


Figure 24

Number of foreign philology students at the University of Silesia in the academic year 2013/2014

Source: ABSL's proprietary analysis based on data of the University of Silesia, report of the Central Statistical Office of Poland (as of 30.11.2013)

	KATOWICE	KATOWICE AGGLOMERATION
Unemployment rate (08.2014)	4.9%	11.3% (average for the cities of the Katowice Agglomeration)
Number of unemployed people with secondary and post-secondary education	3,339	23,920
Number of unemployed with university degree	1,576	8,618
Number of working-age population	192,198	1,219,856

Figure 25
Information on unemployment and the number of individuals of working age in Katowice and the Katowice Agglomeration
Source: ABSL's proprietary analysis based on data of the Central Office of Statistics

Demand for employees who speak foreign languages

Service centres operating in Katowice and the Katowice Agglomeration published on the portal Pracuj.pl (from 01.01.2014 to 24.09.2014) almost 1,700 job advertisements requiring knowledge of foreign languages. Knowledge of English was necessary in less than 1,100 cases. In almost 600 job advertisements, employers expected knowledge of other foreign languages.

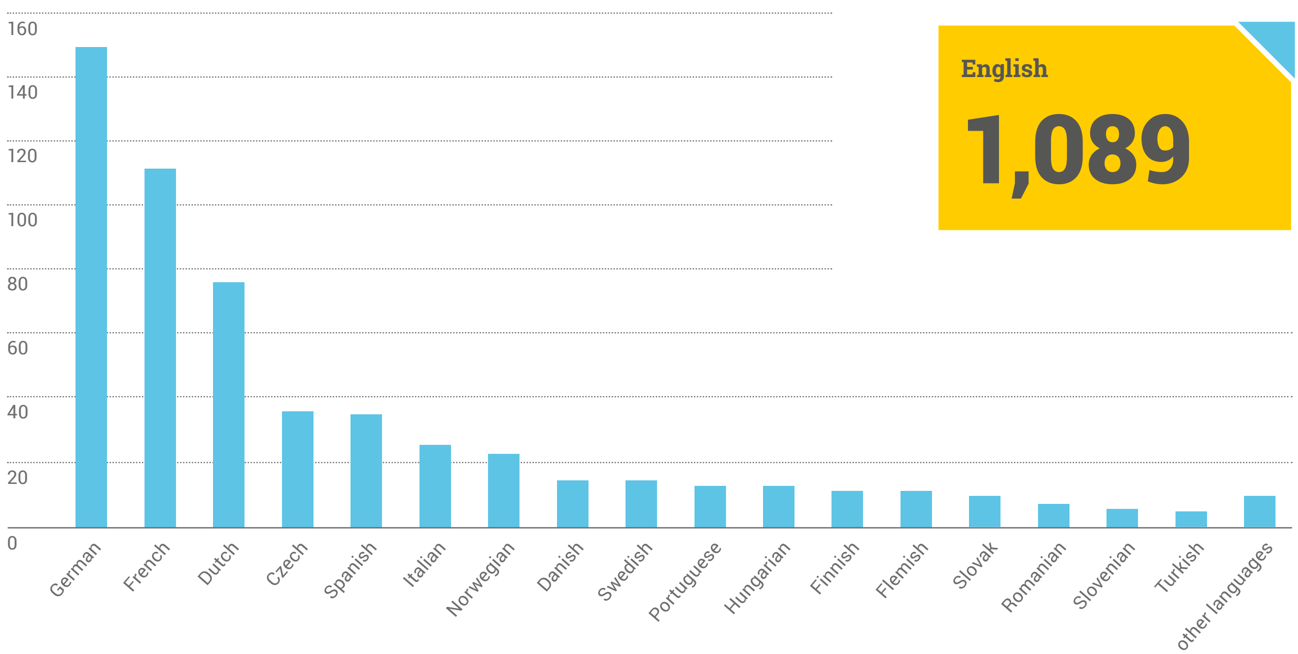


Figure 26
Number of job offers requiring knowledge of foreign languages
Source: ABSL's proprietary analysis based on data from the website Pracuj.pl from 01.01.2014-24.09.2014

Salaries at service centres

Table 4

Salaries at selected positions requiring knowledge of languages other than English [PLN]

	German, French, Spanish, Italian			Slavic and Baltic languages			Dutch and Scandinavian languages		
General Ledger	Min	Opt	Max	Min	Opt	Max	Min	Opt	Max
Junior Accountant (up to 1 year of experience)	3,000	3,500	5,000	3,300	3,850	4,950	3,500	4,200	5,200
Accountant (1-3 years of experience)	4,000	5,000	6,600	4,400	5,500	6,600	4,600	5,750	6,900
Senior Accountant (more than 3 years of experience)	5,000	6,500	8,000	5,500	7,150	8,250	5,800	7,500	8,500
Team Leader (a team of 5-15 persons)	7,000	8,000	10,000	7,700	8,800	10,450	8,000	9,200	1,000
Process Manager (a team of at least 20 persons)	12,000	15,000	20,000	13,200	16,500	19,800	14,000	17,000	21,000
Accounts Payable / Accounts Receivable	Min	Opt	Max	Min	Opt	Max	Min	Opt	Max
Junior Associate (up to 1 year of experience)	2,800	3,000	4,000	3,100	3,300	4,000	3,200	3,500	4,200
Associate (1-3 years of experience)	3,500	4,000	5,000	3,800	4,400	5,000	4,000	4,600	5,200
Senior Associate (more than 3 years of experience)	4,500	5,000	6,600	5,000	5,500	6,600	5,200	5,800	7,000
Team Leader (a team of 5-15 persons)	6,500	7,000	9,000	7,200	7,700	9,000	7,500	8,000	9,200
Process Manager (a team of at least 20 persons)	10,000	12,000	17,000	1,000	13,000	17,000	12,000	14,000	18,000
Customer Service	Min	Opt	Max	Min	Opt	Max	Min	Opt	Max
Junior Specialist (without experience)	2,800	3,000	3,800	3,100	3,300	3,800	3,200	3,500	4,000
Specialist (more than a year of experience)	3,000	3,500	4,500	3,300	3,850	4,600	3,500	4,000	4,800
Team Leader (a team of 5-15 persons)	5,500	6,500	8,200	6,000	7,200	8,200	6,300	7,500	8,600
Process Manager (a team of at least 20 persons)	10, 000	12,000	16,500	11,000	13,000	16,500	12,000	14,000	18,000

Source: HAYS Poland

Photo: Katowice City Hall

Table 5

Salaries at selected positions (with knowledge of English) at service centres in the Katowice Agglomeration [PLN]

General Ledger	Min	Opt	Max
Junior Accountant (up to 1 year of experience)	3,000	3,500	4,500
Accountant (1-3 years of experience)	4,000	5,000	6,000
Senior Accountant (more than 3 years of experience)	5,000	6,500	7,500
Team Leader (a team of 5-15 persons)	7,000	8,000	9,500
Process Manager (a team of at least 20 persons)	12,000	15,000	18,000

Accounts Payable / Accounts Receivable	Min	Opt	Max
Junior Associate (up to 1 year of experience)	2,800	3,000	3,500
Associate (1-3 years of experience)	3,500	4,000	4,500
Senior Associate (more than 3 years of experience)	4,500	5,000	6,000
Team Leader (a team of 5-15 persons)	6,500	7,000	8,000
Process Manager (a team of at least 20 persons)	10,000	12,000	15,000

Customer Service	Min	Opt	Max
Junior Specialist (without experience)	2,800	3,000	3,500
Specialist (more than a year of experience)	3,000	3,500	4,200
Team Leader (a team of 5-15 persons)	5,500	6,500	7,500
Process Manager (a team of at least 20 persons)	10,000	12,000	15,000

IT / Technical Support	Min	Opt	Max
1st Line Support (up to one year of experience)	2,800	3,000	3,500
2nd Line Support	4,000	5,000	6,000
Team Leader (a team of 5-15 persons)	6,000	7,500	8,000
Process Manager (a team of at least 20 persons)	9,000	12,000	15,000

Procurement (Order Management)	Min	Opt	Max
Junior Specialist (up to 1 year of experience)	3,000	3,500	4,000
Specialist (1-3 years of experience)	4,500	5,000	6,000
Senior Specialist (more than 3 years of experience)	6,000	7,000	8,000
Team Leader (a team of 5-15 persons)	7,500	8,000	9,000
Process Manager (a team of at least 20 persons)	12,000	15,000	18,000

HR Processes	Min	Opt	Max
Junior Specialist (up to 1 year of experience)	2,800	3,000	3,500
Specialist (1-2 years of experience)	3,500	4,000	4,500
Senior Specialist (more than 2 years of experience)	4,000	4,500	5,000
Team Leader (a team of 5-15 persons)	6,000	6,500	8,000
Process Manager (a team of up to 50 persons)	12,000	15,000	18,000

Source: HAYS Poland

4 | Office market

In the last two years the development of the office market in Katowice has sped up considerably, and the city has become even more recognisable on the map of outsourcing and shared service centres in Poland.

Silesia Business Park

KATOWICE Office market in numbers

337,000
m^2 total resources of modern office space in Katowice

55%
the increase in Katowice's office resources over the last 5 years

32%
leased office space in Katowice occupied by the business service sector

48
lease agreements signed for office buildings in Katowice in the first half of 2014

34,500
gross volume [m^2]

54,300
m^2 of office space under construction

43,600
m^2 of office space reaching the market in the second half of 2014

12.50-13.75
rental rates in m^2 / month for the best quality office space in Katowice

23
office buildings (commissioned during the last 5 years)

25,400
m^2 of existing office space currently awaiting tenants

Figure 27
Office market in numbers
Source: JLL, second quarter, 2014

Undoubtedly, the introduction of new entities from the business service sector has had an impact on the development of the office building market. Thanks to them, the demand for high-quality office space in the city has grown and many new office projects have been completed. Here, we should primarily mention IBM (new headquarters in A4 Business Park) which has decided to open a new service centre in Katowice and PwC (in Silesia Business Park) which has expanded its operations.

The total supply of office space in Katowice is approx. 337,000 m^2, making it the fifth largest office market in Poland, after Warsaw, Kraków, Wrocław and the Tri-City. At the beginning of 2014, Katowice overtook Poznań in total volume of office stock and constitutes the most important office centre in the Katowice Agglomeration.

Katowice is not the only city in the Katowice Agglomeration where the market for modern office space has been developing. Chorzów, Gliwice, Bytom or Sosnowiec are the main locations of office space outside Katowice. The largest office project available for lease in these cities is Silesia Office Center in Chorzów (13,500 m^2) and the new office building at Strzelców Bytomskich Street in Bytom (12,200 m^2, modernised in the second quarter of 2013). Several office projects are under construction and in the planning phases of development.

Development activity in Katowice

For the last 5 years, the modern office stock in Katowice have grown by approx. 55%, which confirms the intensity of activity by developers in response to the demand generated by increasing number of tenants.

The largest projects opened in this period include: Francuska Office Center A & B, Katowice Business Point, Nowe Katowickie Centrum Biznesu, Reinhold Center A & B, GPP Business Park I & II and A4 Business Park phase I.

Currently Katowice is well prepared to meet the requirements of tenants regarding the availability of office space. This refers both to companies starting their operations in the city and to those already established here which are looking for opportunities to lease additional office space.

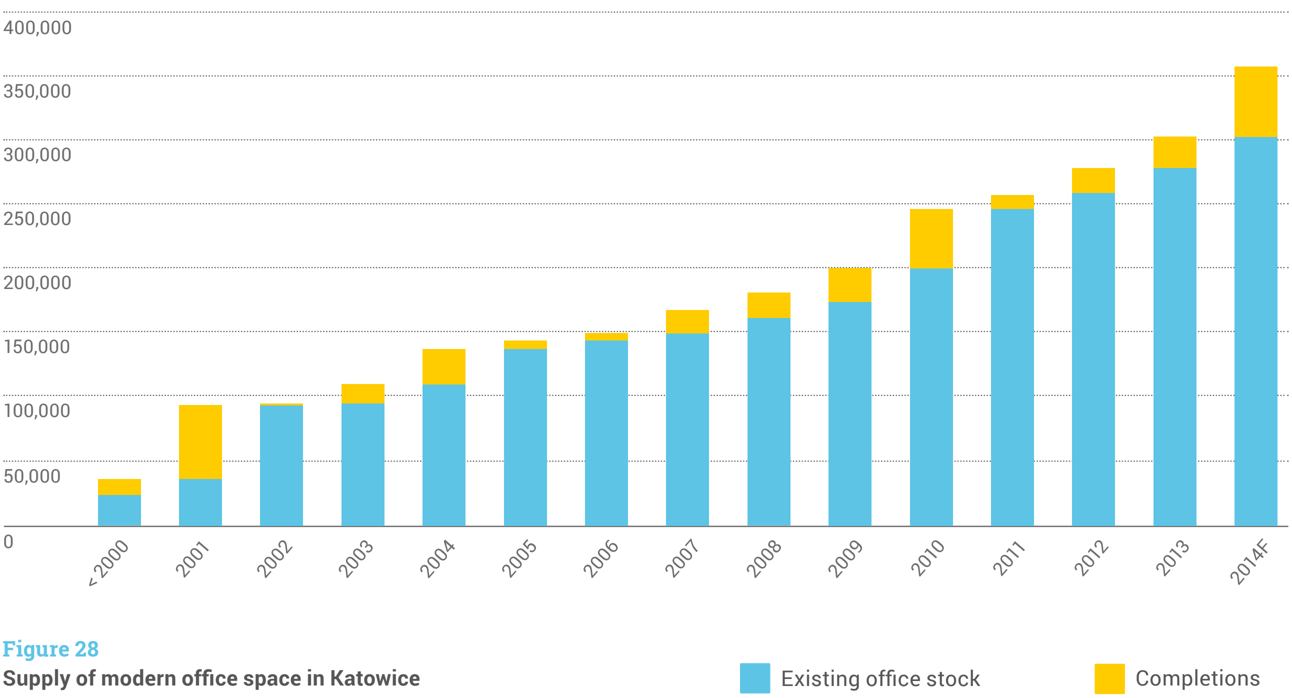
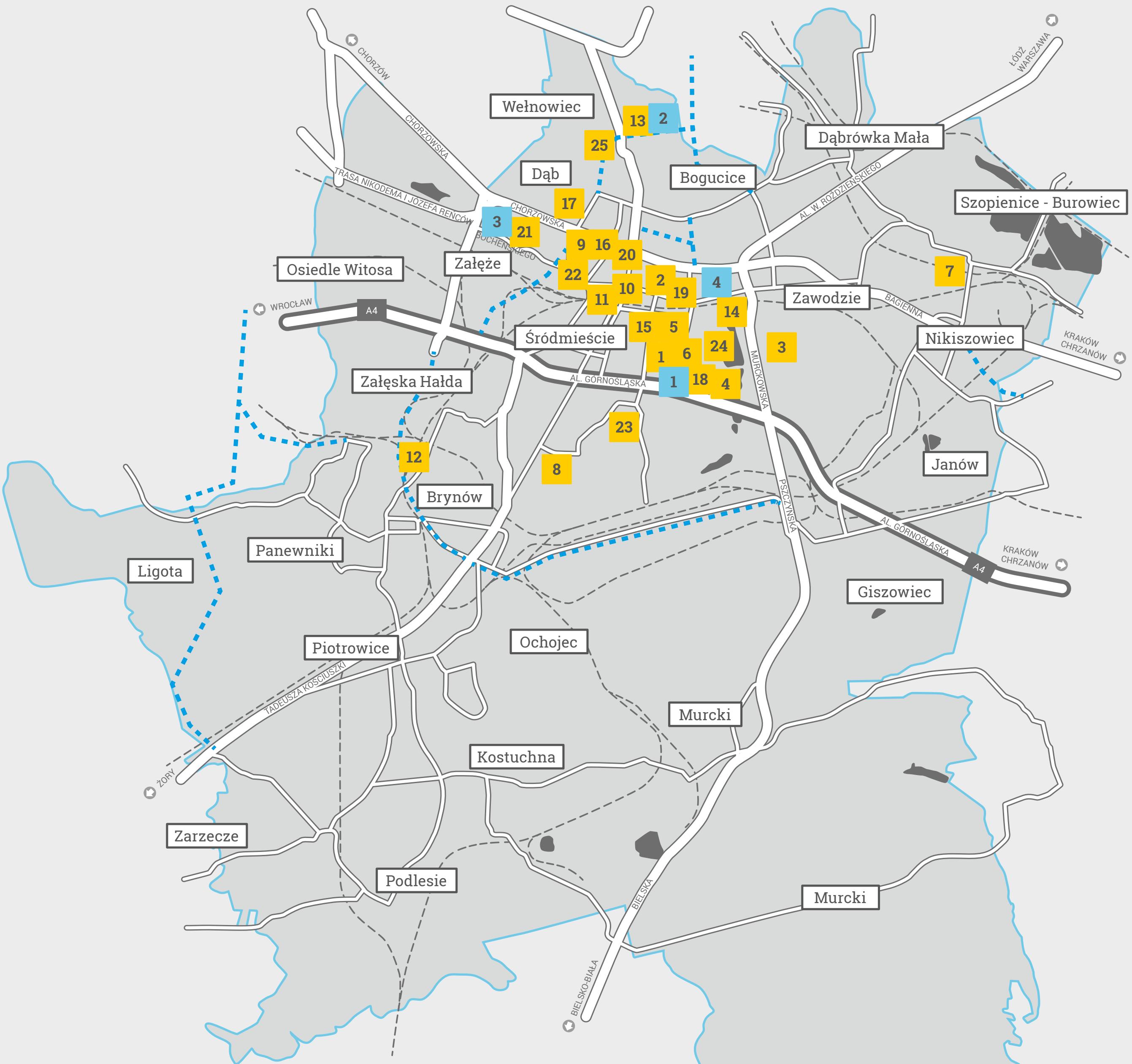


Figure 28
Supply of modern office space in Katowice
Source: JLL, second quarter, 2014



Main existing office buildings

1 A4 Business Park I
2 Altus
3 Atal
4 Atrium
5 Bank PKO BP
6 BRE Bank
7 Browar Factory Centrum
8 Brynów Center I
9 ING Bank Śląski II
10 CitiBank
11 Energomontaż
12 Euro-Centrum I-VIII
13 GPP Business Park I & II
14 Green Park I-III
15 Francuska Office Center A & B
16 ING Bank Śląski I
17 Katowice Business Point
18 Millenium Plaza
19 NBP
20 Nowe Katowickie Centrum Biznesu
21 Opal Gliwicka
22 Opolska 22 (A, B, C, D, E, F)
23 Plus Centrum
24 Polski Koks HQ
25 Reinhold Centre A & B

Main under construction office projects

1 A4 Business Park II
2 GPP Business Park III
3 Silesia Business Park I & II
4 Silesia Star I

Planned roads

Figure 29
Map of office space in Katowice
Source: JLL

Currently approx. 54,000 m² of modern office space is being built, 80% of which will be available for use in 2014. For instance, the following buildings are under active construction: Silesia Business Park I & II (21,340 m²), Silesia Star I (12,700 m²), A4 Business Park II (9,100 m²) or GPP Business Park III (7,500 m²).

Moreover, the following office projects are in the planning stage: Silesia Business Park III & IV (21,340 m², developer – Skanska), Silesia Star II (12,700 m², developer – LC Corp) and the next stage of A4 Business Park (12,100 m², developer – Echo Investment).

Demand for office space in Katowice

The interest of companies in Katowice has been growing constantly and demand for modern office space is generated for instance by foreign investors, who have decided to conduct business activity in the Katowice Special Economic Zone and by companies from business service sector (BPO, ITO, SSC, R&D, Contact Centres).

The first half of 2014 was characterised by a relatively high rate of activities by tenants which leased a total of approx. 34,500 m² of office space (accounting for 57% of total demand recorded in 2013). More than 58% of concluded agreements were new transactions (including letters of intent) related mainly to the relocation of a tenant or launching of a tenant's business in the city. The largest transactions concluded in the first half of 2014 include: UPC (extension of a lease agreement, 6,500 m²), Artifex Mundi (new agreement, 2,111 m²), eSKY / World Express (extension of a lease agreement, 1,860 m²), Wincor Nixdorf (letter of intent, 1,790 m²) and Capgemini (new agreement, 1,500 m²).

Due to the growing accessibility of modern office space both Katowice itself and the entire agglomeration are increasingly perceived as attractive locations for companies from the business service sector. At the end of the first half of 2014 the city offered 9 office modules larger than 1,000 m² in existing buildings and 6 in the projects under construction. This ensures excellent lease options.

Tenants usually choose Katowice after analysing such factors as costs of leasing office space and labour, as well as the fact that the city offers direct access to almost 2 million inhabitants of the Katowice Agglomeration and has a strong position as an academic centre.

At the end of the second quarter of 2014 the vacancy rate in Katowice amounted to 7.5%, which translated into approx. 25,400 m² of space available in existing buildings. Another 40,500 m² of modern space can be leased in office buildings that are currently under construction.

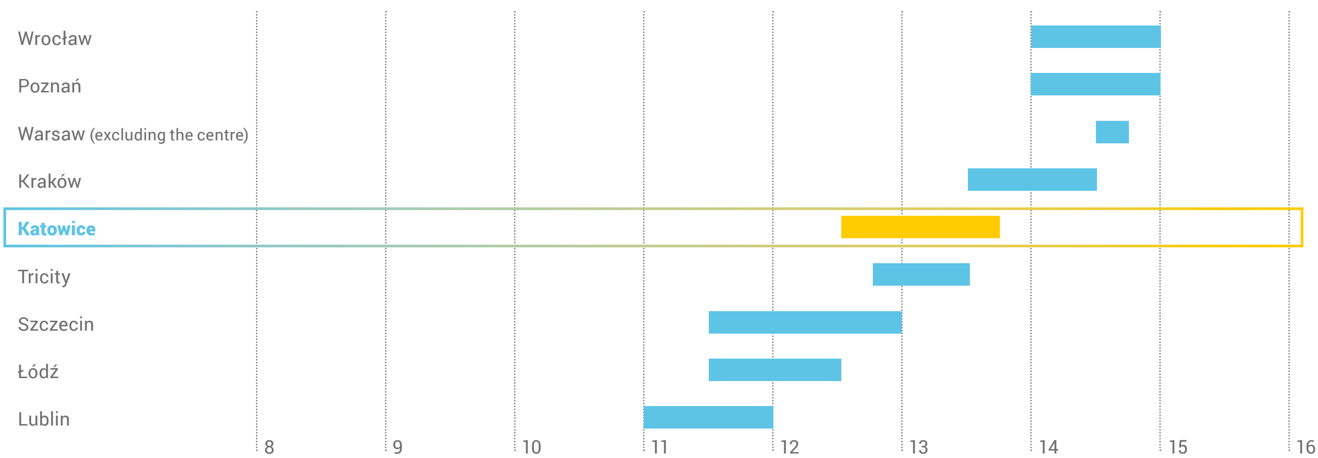


Figure 30
Prime headline rents in major cities (EUR / m² / month)
Source: JLL, second quarter, 2014

A4 Business Park

Level of rent in office buildings

The prime headline rents have been under decreasing pressure in recent years. However, in the first half of 2014 we observed a slight increase in rents paid and at the end of the second quarter of 2014 they ranged from EUR 12.50 to 13.75 per m^2/month.

Rental levels in Katowice are slightly lower than in the largest Polish cities. Obviously, this is advantageous for tenants. Taking into account all the incentives offered, the effective rent is approx. 10-20% lower compared to base rent. We expect effective rates to remain stable in the second half of 2014.

Summary and forecasts

Due to a high level of supply in the second half of 2014 (43,000 m^2) and the forecasted stable level of demand for office space, the vacancy rate is estimated to grow by the end of 2014.

Moreover, the pipeline for 2015 and 2016 will remain at the level of approx. 30,000-40,000 m^2, which as a result may exert upward pressure on vacancy rates and ensure tenants even more attractive leasing conditions.

GPP Business Park

5 | Companies tell their success stories

Capgemini believed in Katowice's potential as early as 2006 and now employs nearly 1,500 specialists. The company's Katowice branch consists of two prestigious office locations, where we mainly deliver and develop modern services related to management of IT infrastructure belonging to our customers headquarted on continent. Our operations in Katowice started with basic support for end users, but today we offer complex solutions for IT support and improve and develop IT technologies based on the highest standards. Our site in Katowice is a significant location on the map of the Global Network of IT Support Centres and ensures the continuity of processes and the effective attainment of operational and business goals for our customers all over the world. Our competences also include an innovative approach to IT services management, where we take responsibility for the group of IT suppliers, merge a range of IT services and monitor the level and range of services rendered.
We participate in the most complex projects implemented for companies in the public sector, power industry, pharmaceutical industry, chemical industry, financial sector; we support their business needs through offering IT systems services at the highest possible level according to a model adjusted to customer needs.

The IBM Delivery Center Poland located in Katowice, began operation in August 2013. The centre renders a wide range of IT services, including the management of server operating systems, protection and safety of systems, services for end customers, which covers the maintenance and monitoring of IT equipment and software systems.

"Katowice and the Silesian Region offer talented labour market resources, strong academic support and a friendly environment for business, which is necessary for our development", said Aleš Bartůněk, Country General Manager, IBM Poland and Baltics. The Centre looks for employees with significant experience and for graduates starting their professional careers. IBM cooperates with local educational institutions in Upper Silesia in order to support the talents and professional skills of students.

PwC Service Delivery Center (SDC) in Katowice was established in 2009. Currently the centre employs approx. 600 employees and is constantly expanding the scope of its operations, both geographically and through developing the range of products offered. SDC focuses on supporting audit and tax teams operating within the PwC network. Services are rendered in eight different languages. The Centre in Katowice is a part of a larger global network, the so-called Service Delivery Network, which forms a significant component of PwC's business strategy and optimisation of services rendered to customers. SDC offers its employees opportunities for continuous development and for enhancing their professional qualifications in a professional, international environment.

ING Services Polska

ING Services Polska Sp. z o.o. (ISP) is a shared service centre that provides innovative IT services to the companies from ING Group all over the world. The company is located entirely in Katowice. ISP was established in 2003 as the third strategic data processing centre in Europe. In 2005 it experienced dynamic international growth, which resulted in the creation of jobs for IT specialists. In 2012 the company obtained EU funding amounting to more than PLN 12 million to develop the IT centre and create 156 new jobs. Now ISP employs 500 individuals and serves 26 customers in 18 countries. The customer portfolio reflects the international nature of the company, which renders services for ING companies located in the largest European countries, as well as in the United States, Singapore and Australia. ISP is the company that regularly introduces innovative technological solutions based on automation or virtualisation. One of them is the Private Cloud, the first such service in the banking sector in Poland. Dynamic development of new technologies is possible due to the establishment of the Solution and Technology Centre. This is an entity consisting of certified IT architects who provide long-term development strategies for the architecture. We are able to change the IT world thanks to the extensive knowledge of the people employed there. ISP is the company with enormous potential, which has been shaping the IT labour market in Silesia for years and offers its employees many opportunities for professional development. Our aim is to train the future IT staff to ensure that our employees constitute the elite in their fields. This is why we initiated cooperation with the best technical universities in the region, organising lectures for students in order to introduce them to the world of IT technologies.

The ABSL Regional Chapter in Katowice is a local action group composed of investors representing the business service sector. The priorities of the ABSL's branch in Katowice include supporting the members of the Association in their activities, exchanging knowledge and best practices for creation of a positive environment for investment and undertaking initiatives to promote the business service sector in this region. For this purpose the companies gathered at ABSL's branch in Katowice cooperate actively with representatives of Katowice City Hall, the Marshall's Office, the Katowice Special Economic Zone and local university centres in the entire Katowice Agglomeration.

Among the members of the ABSL Regional Chapter are for instance the following companies: ArcelorMittal, Capgemini, Comarch, Cooper Standard, DisplayLink, Future Processing, Grant Thornton, HAYS Poland, IBM, ING Services, ista, JLL, Kroll Ontrack, LGBS, Manpower, Oracle, PwC, Rockwell Automation, Saint-Gobain, Steria, Unilever, Wipro, TRW, as well as invited guests who represent the public administration and representatives of university authorities.

6 | Quality of life

Thanks to their vast green areas and numerous tourist, sport and recreational premises, Katowice and the Katowice Agglomeration are attractive places to spend free time. Almost 45% of Katowice's area is covered by green areas that have an impact on the quality of the city's natural environment and a higher quality of life for its population.

Photo: Katowice City Hall

Every year Katowice hosts events attracting hundreds of thousands of attendees from various countries. These are cultural, artistic and entertainment events. The following are the best-known festivals: Rawa Blues, Tauron Nowa Muzyka, Silesian Jazz Festival, Mayday, OFF Festival.

Moreover, Katowice hosts major international sport events such as Men's World Volleyball Championship 2014 or European Men's Handball Championship 2016 (Spodek – Sport and Show Arena).

	KATOWICE	KATOWICE AGGLOMERATION
Cinemas	8	20
Museums (including branches)	5	31
Theatres	13	32
Art galleries (CSO)	10	18
Premises with conference rooms (CSO)	16	66
Number of conference rooms (CSO)	70	169

	KATOWICE	KATOWICE AGGLOMERATION
Total number of hotels	16	104
☆☆☆☆☆	1	1
☆☆☆☆	6	12
☆☆☆	4	32
☆☆	5	26

Figure 31
Quality of life in numbers
Source: ABSL's proprietary analysis based on: Central Statistical Office of Poland, Booking.com, e-teatr.pl, nimoz.pl, filmweb.pl

7 | Support for investors

Katowice ensures an effective local system of investment services, cooperating for instance with the Polish Information and Foreign Investment Agency, the Katowice Special Economic Zone, institutions from the business environment and consulting firms. Investors are offered support in implementing investment procedures, they also receive exhaustive information about the development of the business service sector in the Katowice Agglomeration. Investors can expect numerous forms of support that facilitate the launching and development of business operations. The investors' support system is operated by the Strategic Investors Assistance Department in Katowice (www.invest.katowice.eu).

Photo: Katowice City Hall

Forms of assistance for investors

Income tax exemption	The Katowice Special Economic Zone, the largest special zone in Poland in terms of the volume of investments and employment, is the perfect solution for companies that want to benefit from public support in form of CIT exemptions calculated on the basis of investment expenditures made or created new jobs.
Real estate tax exemptions	Katowice City Hall offers real property tax exemptions within the scope of de minimis assistance – Resolution of the City Council no L/1189/14 dated 28 May 2014 on real estate tax exemptions within the framework of de minimis assistance. Moreover, the Resolution no L/1188/14 of the Katowice City Council dated 28 May 2014 governs real estate tax exemptions for buildings and parts thereof built before 1945 and located in the centre of Katowice, in which façades have been refurbished. This resolution is directed towards individuals and entities conducting business operations.
Services of the Poviat Labour Office	The following forms of support are offered to investors who create new jobs: internship with employers, hiring of the unemployed, refunding of costs related to providing additional equipment for a work position, individual training. The costs are covered by the Poviat Labour Office.
Recruitment of employees	Katowice, along with the Poviat Labour Office, offers support with the recruitment of employees, for instance, in the form of work fairs. University Career Centres, in cooperation with the City Hall, can create dedicated websites and other places to publish job advertisements such as special notice board. Career Centres maintain databases that significantly simplify searches for appropriate candidates.
Marketing support	Katowice offers the organisation of marketing campaigns about investment in Katowice by means of advertisements, for example, outdoor, on-line, in social media and in the press.
Office space	At the preparation stage of an investment, Katowice, along with the Poviat Labour Office may provide office space, where a recruitment team can interview candidates or conduct intensive training.
Adaptation of public transportation	In Katowice it is possible to create additional bus stops (or additional bus connections) for future employees of a strategic investor.
Housing for the employees of an investor	Katowice can offer modern equipped flats attractively located in the centre for the employees of strategic investors. One of the benefits of this type of solution is relatively low rent.
Government grants	Employment grants and investment grants.

Contact information

Strategic Investors Assistance Department in Katowice

Range of tasks:

1. Maintaining a database about the investment areas in Katowice and providing information on the terms and conditions of investments in the city, offering consulting services for investors and help with locations of investments;
2. Services for Polish and foreign investors, including: negotiating with an investor, help with the preparation of necessary documents; monitoring of an investment project through successive stages, including follow-up services;
3. Preparing the city's investment offers and organising meetings of investors with representatives of Katowice's authorities;
4. Cooperation in attracting investors to Katowice with: the Polish Information and Foreign Investment Agency (PAIiIZ), the Katowice Special Economic Zone, the Silesian Investor and Exporter Assistance Center, Polish– foreign chambers of commerce and industry, consulting firms and other institutions mediating the process of attracting investors;
5. Providing information about foreign investments in Katowice and creating new forms of assistance for investors.

Contact:

Mateusz Skowroński
Director of Strategic Investors Assistance Department

Katowice City Hall

Rynek 1, 40-003 Katowice

+48 32 25 93 823
pkis@katowice.eu
www.invest.katowice.eu

Silesian Investor and Exporter Assistance Center

Scope of activity:

1. Providing business information about the region for investors;
2. Searching for both greenfield and brownfield locations for investment;
3. Investment support in direct contact with local government entities;
4. Cooperation with Katowice Special Economic Zone.

Contact:

Marshal Office of the Silesian Voivodeship
Silesian Investor and Exporter Assistance Center

ul. Ligonia 46, 40-037 Katowice

+48 32 77 40 978
info@invest-in-silesia.pl
www.invest-in-silesia.pl

Górnośląski Park Przemysłowy Sp. z o.o.

Range of tasks:
The construction and rental of modern, energy-efficient office space within the framework of the GPP Business Park complex, which includes the Goeppert-Mayer building, the only office building in Poland to have received the highest possible rating, OUTSTANDING, within the UK's BREEAM system of certification of sustainable buildings.

Contact:

Górnośląski Park Przemysłowy Sp. z o.o.

ul. Konduktorska 39a, 40-155 Katowice

+48 32 78 12 000
+48 32 78 12 032
gpp@gppkatowice.pl
www.gppkatowice.pl

Upper Silesian Regional Development Agency (GARR)

Range of tasks:
Its main objective is to support regional development through cooperation with investors, government and local administration, as well as scientific and economic environments and the media, to implement EU programmes. Moreover, it also offers services related to the handling and implementation of the national and foreign programmes and projects based on the certification of standards of services obtained in order to prepare effective applications for supporting funds.

Contact:

Upper Silesian Regional Development Agency (GARR)

ul. Powstańców 17, 40-039 Katowice

+48 32 72 85 800
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garr@garr.pl
www.garr.pl

Euro-Centrum Group

Range of tasks:
The Euro-Centrum Group in the Euro-Centrum Industrial Park leases out modern space to companies that use of the potential of the business and scientific environment concentrated here. It also conducts research, consulting, training and educational activities.

Contact:

Euro-Centrum S.A.

ul. Ligocka 103, 40-568 Katowice

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+48 32 20 50 092
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kontakt@euro-centrum.com.pl

Photo: Katowice City Hall

8 | Poland – key information

LEADER ON THE MAP OF BUSINESS SERVICES

128,000 number of employees
number of employees of BPO/ITO/SSC/R&D centres with foreign capital in Poland in 2014 *(ABSL)*

470
number of BPO/ITO/SSC/R&D centres with foreign capital in Poland in 2014 *(ABSL)*

40%
of employees of BPO/ITO/SSC/R&D centres with foreign capital in Central and Eastern Europe are employed in Poland *(ABSL)*

20%
average annual growth of employment in BPO/ITO/SSC/R&D centres with foreign capital in Poland *(ABSL)*

150-170 thousand
estimated people employed at BPO/ITO/SSC/R&D centres with foreign capital in Poland as of the end of 2015 *(ABSL)*

Human capital

438
the number of universities in Poland *(CSO 2013)*

1.5 million
the number of students in Poland *(CSO 2013)*

10%
Polish students account for 10% of total students in the EU *(Eurostat 2012)*

13.5 mln
the number of Poles below the age of 30 *(CSO 2013)*

USD 248.2 billion
the cumulative value of foreign investments in Poland (as per 31.12.2013)

EUR 82.5 billion
funds for Poland within the framework of the EU cohesion policy in 2014-2020

Poland is a member of
the European Union, NATO, OECD, WTO, Schengen Zone

POSITIONS IN RANKING LISTS

The most attractive
country in Central and Eastern Europe for new investments *(Europe's Investment Attractiveness, EY 2014)*

1st
Poland first in the Central and Eastern Europe and 3rd in the continent in terms of jobs created through direct foreign investments in 2013 *(Europe's Investment Attractiveness, EY 2014)*

1st
most new investments in research and development in Central and Eastern Europe in 2013 *(Europe's Investment Attractiveness, EY 2014)*

The most attractive
real estate market in Europe *(European real estate assets investment trend indicator 2014, EY, 2014)*

8th in the world
in terms of knowledge of English *(Education First: English Proficiency Index 2013)*

Figure 32
Poland – key information
Source: ABSL; CIA World Factbook; Eurostat; Central Statistical Office of Poland; EY; NBP; www.ef.pl/epi; www.funduszeeuropejskie.gov.pl


KATOWICE
for a change
www.invest.katowice.eu

www.absl.pl