# grafton Gi Group Holding

# Business Services

2025 Special Edition

# Table of Contents

About the report
Introduction
General data
Poland's largest cities
Cracow
Warsaw
Wrocław
Gdańsk and Tri-City
Katowice and Metropolis GZM
Łódź
Poznań
Salaries
Poland as an investment destination
Research into BSS sector employees



# About the report

#### The report is adressed primarily to:



Top and medium-level business center managers



New investors



Investment support organizations and business associations



HR departments

#### Individual orders

If you'd like to receive detailed analyses, data and comparisons for the specific needs of your company, get in touch with us! We also create paid reports as individual commissions. We invite you to reach out to us.

#### The report's outline

The cities are presented in an order based on the size of BSS employment - from the largest to the lowest number of residents employed in the industry. According to the ABSL report, Warsaw and Cracow employ the same number of BSS workers.

#### Market data

The report utilizes data from the Central Statistical Office (GUS), the Local Data Bank maintained by GUS and the "Modern Business Services Sector in Poland 2024" report published by ABSL.

#### **Salary Charts**

The benchmark has been created by Grafton Recruitment experts. The pay ranges are provided in gross monthly PLN pay. The values presented in the research encompass both factual market values and 2025 forecasts. Furthermore, wee also present the most commonly offered pay. The lower value of a pay range indicates the lowest salary allowing one to hire a given specialist, while the higher value describes the amount necessary to hire a specialist with most experience, knowledge or skills.

The salaries in key areas were categorized based on location and experience:

Entry level: up to a year of experience

**Specjalist:** 1-3 years of experience

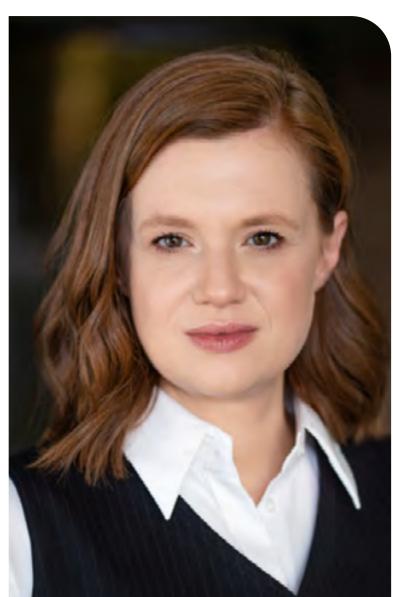
**Senior Specialist:** 3-5 years of experience as a specialist

Team leader: at least a year of experience as a leader

Manager: at least a year of experience as a manager



**Business services 2025**Introduction





Managing Director Grafton Recruitment



Ewa Michalska

Operations Director Grafton Recruitment

# BSS challenges. How can we win this race?

We welcome you to read a special edition of our report on the BSS market. In this jubilee edition, we sum up the sector's last ten years. Which moments were the best for it? Which have proven to be breakthroughs?

The first years have created a strong foundation for the sector's later growth. Poland has quickly become one of the most important countries for the shared business services industry, utilizing its strategic advantages: an attractive economic environment, advantageous location, access to highly qualified personnel and competitive costs. The pandemic brought changes, forcing the sector to adapt, like many others. The industry faced challenges concerning the quick and effective implementation of new technological solutions, managing dispersed teams, or raising their competencies. This transformation has been further influenced by the global impact of the war in Ukraine – economic instability, businesses and investors abandoning long-term planning and the need to optimize costs.

The new conditions are impacting both the structure of currently supported projects and required competencies. Increasing costs of labor in Poland are causing some services to be relocated outside Europe. Poles are primarily handling the more advanced processes requiring specialist competencies. Another factor impacting the expectations in the area of skills and the scale of employment is growing automation and the proliferation of artificial intelligence.

Despite the many challenges such as the growing costs or unstable economic circumstances, Poland remains a key player in the global BSS market. Our advantages in attracting foreign capital include fluency in the language of business, high quality of work and competencies. Retaining competitiveness requires the sector to keep staying ahead of the trends, bolstering competitive advantages and seeking out new ones. After all, we live at a time when the only constant is change.



#### General data





Country's population\*



37,636,508 21,985,460

Working age population\*



5.4%

Unemployment January 2025



PLN 8,482.47

Average gross salary January 2025\*\*



<sup>\*</sup> Source: Gus, 2023 data, published on 24.11.2024

<sup>\*\*</sup> https://stat.gov.pl/sygnalne/komunikaty-i-obwieszczenia/lista-komunikatow-i-obwieszczen/obwieszczenie-w-sprawie-przecietnego-miesiecznego-wynagrodzenia-w-sektorze-przedsiebiorstw-w-styczniu-2025-roku,56,135.html

### **Shared Services Centers in Poland**



457,100



1,941

+16,500<sub>(3.74%)</sub>

Employment increase as compared to 2023

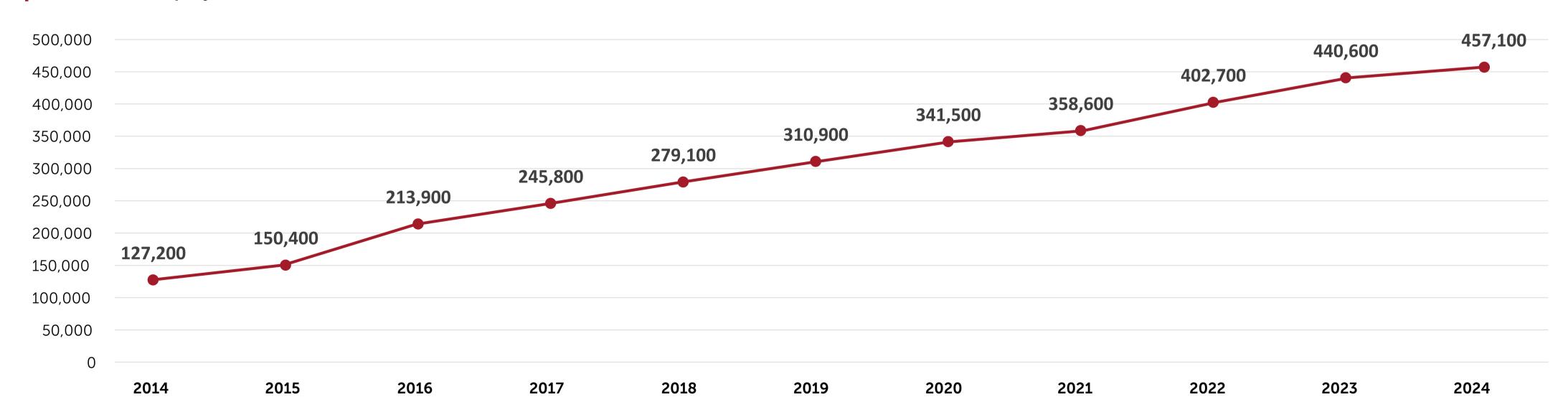
Employment in business services centers\*

Number of BSS centers\*

Despite an uncertain market situation in 2024, the number of workers in the SSC sector has increased by 3.74% since the year before. Everything points toward this trend continuing throughout 2025.

International businesses, which paused recruitments in the previous year are now adopting a more optimistic future outlook and beginning to cautiously consider bolstering their teams. Unerringly, Poland remains one of the top investment destinations for international companies.

#### **BSS** sector employees



BSS employees



<sup>\* &</sup>quot;Modern Business Services sector in Poland 2024" report by ABSL



The 2022/23 academic year saw an increase in the number of students by 0.4% as compared to the previous year. In 2023/24, it was as high as 1.8% — this marks the highest increase for years, sending a very positive signal for Poland's job market, which is increasingly searching for educated specialists.

Business, administration and law-related faculties are continuing to attract the most students, reflecting the strong demand for competencies in these areas. It bears mentioning that these faculties offer broad professional opportunities, preparing for many different roles and jobs. This means that young people are consciously adjusting their choice of education to fit the needs of the market, hoping to obtain qualifications that are in high demand.

The above-mentioned faculties are followed by social sciences, journalism and information, chosen by over 14% of all students. This marks a notable promotion, as in the earlier years this group was only the fourth most popular. Healthcare and technical studies also keep enjoying fairly high interest.

However, not everyone is a winner. Natural sciences, mathematics, statistics and agriculture-related faculties are losing popularity each year. In the case of the latter, the declining popularity reflects the long-term urbanization processes and ensuing changes in professional aspirations among the youth.

#### Fields of study according to ISCED-F 2014

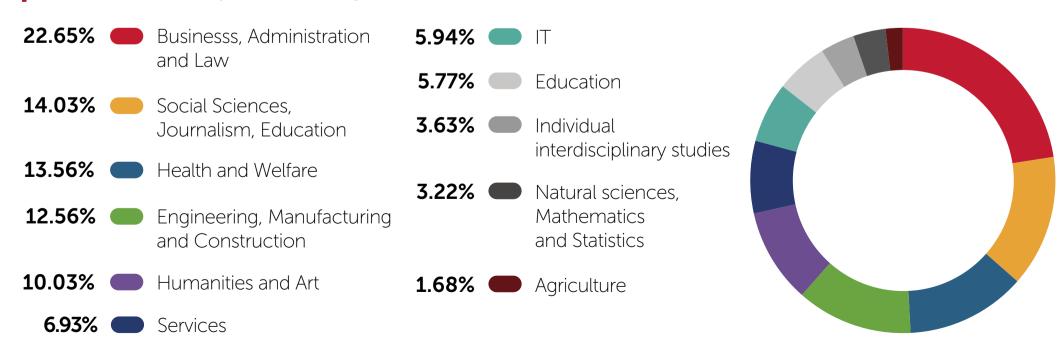


Chart - source of data: Central Statistical Office, "Higher education in the academic year 2023/2024"







#### Anna Federowicz

Permanent Recruitment Services Manager



#### Demand for roles

In 2024 we have seen a falling number of job offers (as compared to 2023) in such areas as marketing, customer service, managing human resources, finance, accounting, logistics or the supply chain.

We also saw a reduced number of offers in the area of Business Intelligence – that, for the first time in our reporting, we spun off into a separate category in our demand analysis. However, it bears mentioning that the exact scale of the decrease differed between various industries.

This situation could have been caused by a number of factors, of which the most important ones include the 2024 economic downturn in Poland and Europe. In an attempt to respond to the market situation, some organizations focused on optimizing costs and limiting planned migrations of new projects to Poland and some others chose to implement their operations in countries with lower costs of labor. As a result, the number of new positions has decreased and current recruitments largely concern filling out pre-existing vacancies.

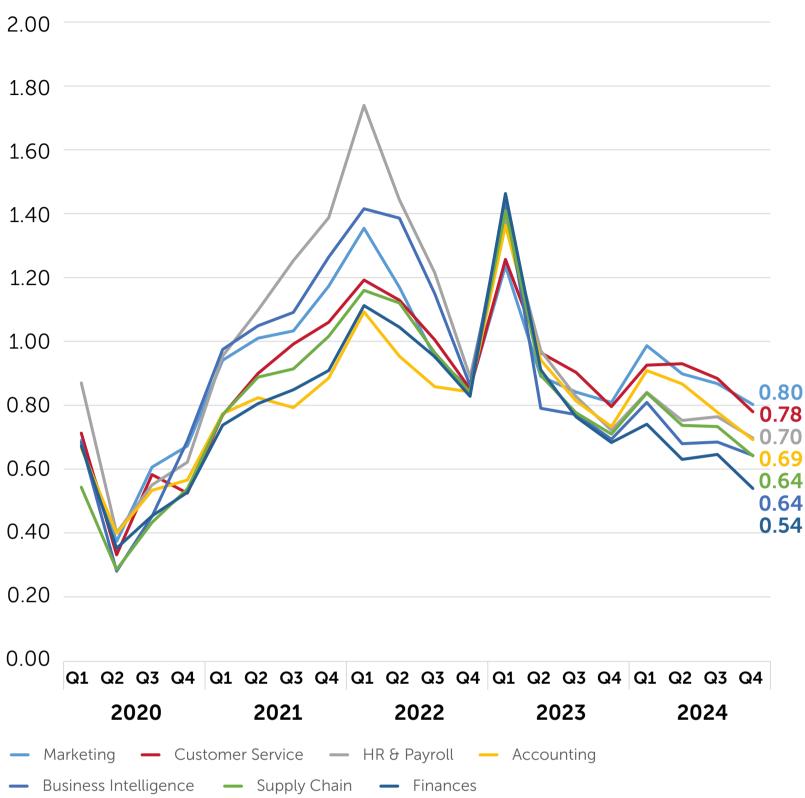
The falling number of offers is also caused by the growing automation of business processes and the introduction of new technologies, leading to lowered demand for creating new jobs in the sector.

It also bears mentioning another aspect. The economic downturn of recent

years and ensuing uncertainty have had a major impact on the professional choices of the candidates. We have observed a decreased willingness to actively participate in recruitment processes, which has led to limited readiness to change one's workplace. The candidates were more cautious about deciding to leave their current employer, with the tendency to stay at one's current organization – even if offered an attractive proposal – being markedly higher than in the previous years. Key factors shaping this trend included a sense of security arising from working within familiar structures.

This stance has had a direct impact on the demand for various positions. The highly cautious attitude of the candidates has made filling vacancies a much greater challenge – especially when it comes to the roles requiring experience and advanced competencies. Businesses had to face a much lower number of people eager to change employers. In consequence, they began adjusting their recruitment strategies, placing a greater focus on employee retention and internal development instead of intense recruitment from the market. And they were successful in doing so. Intensive efforts toward creating friendly workplaces fulfilling the needs of their employees have led to increased employee loyalty. This is yet another cause for employees to be less likely and more deliberate in deciding to change their place of employment based solely on financial factors.

## Demand for BSS roles





## A decade of growth for the Shared Services Centers — the sector's best year





#### Olga Garbarska

Manager, HRBP, Poland





#### **Marcin Borowski**

HR Manager w Wilhelmsen Business Service Center



The years 2023-24 were the best, though also the most difficult period for the SSC industry. On one hand, highly qualified employees and growing office space led the shared services centers to attract investors (such as the US Primient). However, on the other hand, global competition and pressure to optimize processes forced the businesses to restructure, which often led to downsizing.

The SSC industry is currently undergoing transformation and businesses that reduced employment are changing their approach. They invest in automation and advanced technologies, as well as adapting their business models to market requirements, improving their effectiveness and creating more value for the clients. Moreover, SSCs are opening themselves up to employees with diverse professional experience: increasingly often, they hire people with factory work experience, who understand the realities of manufacturing, logistics or operational management. Their practical knowledge and understanding of business processes – including those unrelated to the traditional sphere of finance – are proving to be precious resources for organizations seeking diverse competencies.

This trend is proving that the shared services centers are not only handling the difficulties well but also adapting to the changing market circumstances, attracting talents from various industries. The coming years will be full of challenges ahead for the SSC sector, yet also filled with new opportunities to reshape its future.

Depending on one's perspective, the best year for shared services centers could be either 2015 or 2021. 2015 was key in terms of the sector's quantitative growth. It was the de-facto beginning of the SSC sector's development and Poland staked its claim as one of the major outsourcing hubs back then. This was particularly true of the finance, IT and broadly understood HR.

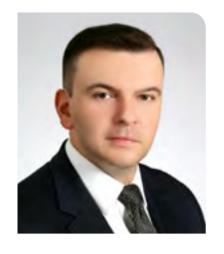
Thanks to participation in European structures, advantageous economic conditions and the high availability of various competencies in the job market, our country has become the first choice for international businesses looking for a location to expand shared services. In Szczecin's local market, this was (and remains to be) particularly distinct in the case of Scandinavian companies which – aside from investments – have brought their unique work model, forever shaping the industry's further development.

On the other hand, the pandemic-defined 2021 forces us to "rearm" in many areas, paving the way for notable qualitative growth of the industry. A complete change in how the businesses are run forced the shared services centers to gain new competencies related to managing dispersed teams, implementing new technologies or opening toward more flexible cooperation models within the teams. Some adjusted their business priorities, as matters such as stability and predictability have become as important as cost-effectiveness, especially in areas such as the supply chain. What was a change back then has now become a norm. The digitization has had a positive impact on business effectiveness and skill development alike. Nowadays, there are some voices advocating for abandoning some of the post-COVID solutions (such as limiting remote work), but it doesn't change the fact that 2021 is still being seen as an impulse changing the shared services centers and launching many positive solutions that we've all grown used to.



## A decade of growth for the Shared Services Centers — the sector's best year





Paweł Fąfara

Managing Director



Selecting a single best year for the BSS industry in the last decade would be a daunting task – and one greatly dependent on the adopted criteria, such as the number of new centers, scale of employment or technological change. Nevertheless, my experience leads me to conclude that the years 2020-21 were perhaps the most interesting.

The COVID-19 pandemic has had a massive impact on the organization of work across the entire globe, with the necessity to adapt to a new reality, including the lockdowns, leading to the proliferation of the remote work mode. For the BSS industry, which used to face certain limitations (especially related to the need for the physical presence of employees in offices), this opened new possibilities. Thanks to the utilization of online tools, geographical proximity ceased to be a key business factor, allowing businesses to locate some of their operations, hitherto implemented in other corners of the world, to Poland. This relocation of tasks associated with highly specialized markets (such as cybersecurity, digital marketing or data analysis) has become a very real possibility, greatly extending the sector's offer and thus also its importance.

Another key aspect concerned speeding up nearshoring investments. It turned out that, especially in a time of crisis, the quality of cooperation and the reaction speed are of utmost importance. The years 2020-2021 saw Poland strengthen its position as one of the major hubs to which BSS was relocated. Geographical proximity, lack of cultural barriers and cost-effectiveness have all made nearshoring in Poland to be the most effective form of organizing business processes.

Furthermore, during the pandemic the BSS sector proved to be a stable and flexible workplace. While other industries struggled with employment reduction, BSS companies kept hiring, offering their employees professional growth opportunities, attractive benefits and the ability to work in high-potential locations. This has attracted new talent and led to further growth in the sector.

Today, Poland's BSS sector employs approximately 450 thousand people and is a major contributor to the Gross Domestic Product (GDP). I fully believe that the changing organization of work, accelerating digitization and expansion of nearshoring in the years 2020-21 were key for changes in the industry, both in Poland and worldwide.



## A decade of growth for the Shared Services Centers — the sector's best year





#### Paulina Jabczyńska





While it would be quite difficult to choose a single best year for Poznań's SSC market, one could easily argue that in the last decade (2014-2024) years 2015-27 proved most positive for both investors and candidates — and therefore future SSC employees. Following the successful openings of Poznań's oldest SSCs, an increasing number of investors have chosen to relocate here.

Poznań became a recognizable European city providing very good finance and accounting, IT and customer service specialists while retaining competitive costs compared to Western Europe. As a university city, Poznań supplies scores of technical and economic graduates fluent in foreign English, as well as linguists proficient with foreign languages from all over the world. Another key advantage lies in the city's geographical location and well-developed transport infrastructure. The latter helped the SSC industry notice smaller cities, including Poznań, once Warsaw's market got somewhat saturated.

For Poznań's SSC sector, the years 2015-17 have proven to be a time of stability, which went on to form the basis for the sector's further development. New shared services centers were opened while pre-existing ones brought in new processes, including those hitherto serviced in other countries. One could note the growing popularity of the LinkedIn portal and speeding up recruitments, including employee transfers within the SSC industry. Competencies obtained in other companies (especially skills unique to the shared services sector, such as understanding the transition process or understanding their standardization) have greatly shaped the development of subsequent SSCs, hastening both their structuring (from founding to stabilization) to

developing specific departments. The industry expanded to create new departments in addition to the popular AP, AR and GL. Furthermore, HR, marketing or legal support was moved to SSCs and their range of serviced languages was expanded.

For the HR segment, the years 2015-17 saw in-house recruiters play a key role in Poznań's market. This was particularly true of the turn of 2016 and 2017, when a number of important brands entered the market, shaking up the sector. While this period of dynamic recruitments proved difficult for many of Poznań's shared services centers, the businesses largely persevered thanks to an advantageous economy, often going through structural changes. This time also saw the rising importance of non-wage benefits, which at a time of intense recruitment have become an important motivator for changing one's employment within the SSC sector.

The subsequent years have led other Polish cities to gain popularity among foreign investors while the outbreak of the pandemic in 2020 caused a certain slowdown on Poznań's SSC market. Thankfully, it wasn't completely still – this period still saw a number of new centers being opened, including my current workplace, Sennheiser Global Services, which opened in 2022. However, as of late, the intensity of new service center openings has been much lower than 8-10 years ago.



## A decade of growth for the Shared Services Centers – the sector's best year





#### Kamila Woźniakowska

Plant Manager Alorica



It is difficult to select only one year, as I believe there were several key milestones in the last decade. In my opinion, 2014 was a good year for our industry as the growing popularity of Central-Eastern Europe has led to continuous growth - which benefited Poland. This, along with a wave of new investments, led to a significant increase in employment in the BPO sector.

I also believe 2020 was a pivotal year, creating more advanced ways of working. The pandemic forced us to remain flexible and adjust, setting remote work as a new baseline standard. It also emphasized the development and deployment of digital solutions to support business continuity and resilience, causing companies to increasingly look towards automation and Al solutions to bolster their efficiency and reduce costs. This has had a lasting impact on the sector, as businesses now have to navigate tech opportunities and race each other to unlock the perfect harmony between man and machine.





# **Wojciech Bartz**

Partner
Head of Business
Services Practice



# BSS: Leadership at a time of constant change

The past few years have been defined by complexity and volatility. While the ever-accelerating technological transformation took the center stage, when in comes to management one cannot omit the ongoing generational change. It also bears mentioning changes caused by the pandemic, the unsettling geopolitical situation and future concerns. Modern leadership has had a major role in facing these challenges. But what does it mean nowadays? How did the role of the leaders change, as they had to adjust their management styles to the new circumstances?

The BSS sector has shown maturity and openness to change. An example of that could be the effectiveness with which stationary work shifted into a remote mode – a feat that many of the organizations have managed in a handful of days, if not hours, maintaining the quality and speed of their services or trust of their clients with no major disruptions. The switch to remote work mode was made possible by earlier implementation of new technological solutions. Management style proved to be another key factor – businesses whose management model centered around openness and trusting their teams, rather than constant control and settling work time, have fared better than others.

Before 2020, could anyone expect that recruitment for SSC teams and onboarding of new employees will turn online overnight? The history of Poland's SSC markets has seen many examples of start-ups that, despite many difficulties and limitations, began operating during the pandemic and still remain strong. The managers have shown mature attitudes and openness to change by noticing the opportunity to remodel their recruitment processes and abandoning – at least temporarily – the previous requirement for stationary office work.

A 2025 leader is a manager who actively seeks innovative solutions, expands their portfolio of services and strives to start servicing new projects. It became key in the context of high competitiveness and creating opportunities for taking over servicing of complex processes requiring high competencies. The implementation of new technologies is certainly playing an important role as well. The era of simple and repeatable tasks is coming to an end, making way to the utilization of algorithms. Noticing this trend, the leaders have been preparing their teams for working with the AI models and advanced data analysis for quite a while. Such tactics are unsurprising – for many years, the industry has shown ability to effectively adapt to the ever-changing conditions, creativity and some good, old fashioned diligence.

Finally, it also bears highlighting the sector's transformation due to Generation Z entering the job market, wishing to work in accordance with their own value systems and and expecting partnership and empathy from their managers. The need to retain work-life balance have led us to the point where adjusting organizational cultures and policies in the area of work model flexibility doesn't raise eyebrows.





#### Katarzyna Kulik-Kiernoz

Recruitment Expert



# Demand for foreign languages

In 2024, proficiency in foreign languages remained a key skill in the job market. The analysis of offers has proven that German remains the language most sought after by employers – it is required by half of all linguistic positions, especially in the areas of customer service and accounting. The second place went to French, although the demand was three times lower than for the German. Subsequent positions, with a fairly similar demand, went to Italian and Spanish.

It bears taking note of the changing trends. Despite the dominant position of German, the number of job offers involving this language has been falling for the past two years. A similar situation concerns Dutch. This is primarily an outcome of the job market slowdown. On the other hand, the demand for Asian languages, such as Chinese or Japanese, is growing and this trend is likely to continue in the coming years.

Interestingly, fluency in English ceased to be considered an additional ability. Nowadays, it is a necessary tool for effectively fulfilling one's obligations, due to unceasing business demand for it.

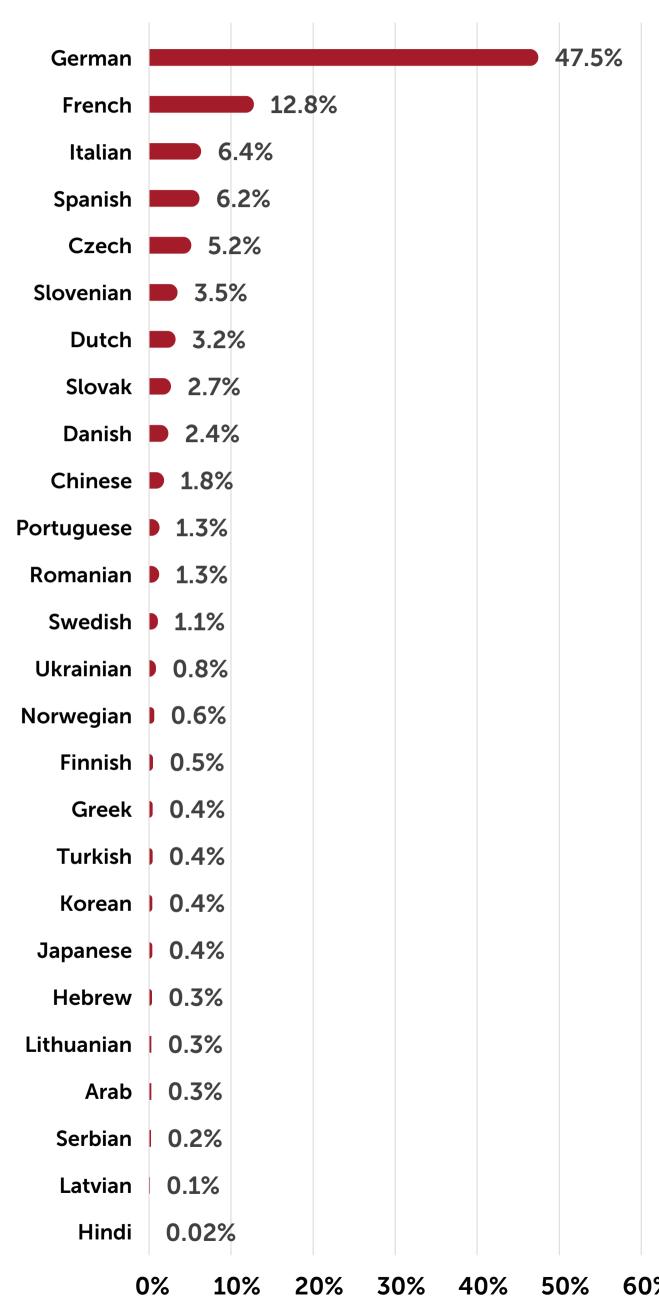
#### Language bonuses

Many businesses are phasing out traditional bonuses for fluency in foreign languages, instead focusing on offering higher base salaries for candidates. This trend shows that language skills are increasingly often considered to be a standard element of required qualifications for a given position, rather than an additional advantage.

The difference in salaries being offered for similar positions, depending on the exact language being sought after, is quite noticeable. Fluency in Dutch, German or French can increase offered salaries by approx. 20-30% on average, and sometimes even up to 40% as compared to English-only positions. Scandinavian languages are in a similar position. In the case of Spanish, Italian or Czech, the difference in pay is closer to the 10-25% range.

According to the surveyed BSS employees, the languages with the strongest impact on offered salaries in 2025 will be German and Scandinavian languages, followed by French and Chinese.

#### Demand for foreign languages - 2024





#### The evolving demand for foreign languages in Shared Services Centers





#### Olga Garbarska

Manager, HRBP, Poland







#### **Marcin Borowski**

HR Manager w Wilhelmsen **Business Service Center** 



In my opinion, the English language remains in the top spot and it's hard to imagine it being overtaken in the future. In the corporate world, proficiency in English on at least a communicative level has become a baseline standard. It's still the most common linguistic requirement in job offers, followed by German and French.

However, what's changing is the employer approach to foreign languages. What matters is no longer merely a proficiency certificate, but rather practical abilities: ease of communication, carrying out business talks or partaking in discussions are of particular value for the SSC industry.

Potential investors aiming to open new shared services centers in Poland and utilize English for interdepartmental communication have nothing to worry about. Nowadays, people entering the job market have high proficiency in English and can use it fluently in everyday situations, greatly differentiating them from candidates from a decade ago. English proficiency among the potential employees, when combined with their openness to new technologies causes Poland to be an attractive location for global businesses.

I believe that, when it comes to languages, what will greatly rise in importance is the ability to precisely phrase questions in English. At a time of growing importance of artificial intelligence, it is becoming a key skill, both for the sake of working with AI tools (chatbots, automation systems) and data analysis in international environments. A properly phrased question in English allows for the best utilization of artificial intelligence in process automation and analysis-based decision-making.

Competencies related to foreign languages are among the key factors influencing the development of the shared services industry in Poland. English was and remains a dominant language, however, there are countries for whom being able to communicate in their native language is of great importance. Germany, France or Italy.

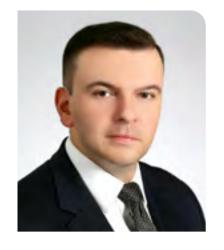
By observing the latest experiences of SSC companies, one could see the demand for foreign languages other than English being particularly high in the first stages of cooperation (process transition), when trust and relationships are being built. With time, communication naturally drifts toward English, although it bears mentioning that the exact industry a given company operates in definitely has an impact on the demand for foreign languages.

When it comes to future forecasts, the way language competencies are being used can definitely change. Al will surely be able to take over many aspects of communication in foreign languages (it is estimated that translators will be one of the first jobs largely replaced by AI). While in the case of easier processes language competencies will have a smaller impact, when it comes to the demand for a given language the expectations as to fluency and communication skills might increase, especially in areas requiring specialized knowledge.

The dominant position of the English language in the world of international business definitely remains safe. Yet, at the same time, we can all see how quickly the world is changing – given, for example, the rapid growth of China. Aside from the geopolitical or economic challenges it brings, it very likely might drive the demand for the Chinese language in the SSC industry over the coming years. However, coming back to the issue of AI, I feel that regardless of the type of language, the ability to use it in more advanced processes or spheres of cooperation will prove a key aspect.

# The evolving demand for foreign languages in Shared Services Centers





Paweł Fąfara

Managing Director



The issue of foreign languages in the BSS sector is particularly close to me, as it has been accompanying me from the very beginning of my career. Twenty years ago, fluency in the German language was a key asset opening the doors to numerous professional opportunities: it made it much easier to make new contacts, build client trust and provide access to projects requiring specific language proficiencies. Back then, even the IT systems often used local languages, requiring the specialists to be proficient in these languages to be able to effectively support the operational processes.

Nowadays, the situation has become diametrally different. Despite working at a company with German roots, some 99% of our communications are in English. The English language has become a universal business language and the familiarity with it is constantly spreading thanks to systematic education, the availability of free online materials and its omnipresence in the IT industry, where it has become a de-facto "native" language. Today, it's hard to imagine a large international organization that does not rely on English for its internal and external communications.

At the same time, the business world began to notice that maintaining numerous languages in process management leads to high expenditures. In the past, we have seen cases of limiting transfers of processes requiring proficiency in the less popular languages, as there was a market shortage of specialists with the right language competencies. This has sped up the development of technologies supporting automation and the reduction of dependence on local languages, which in turn reduce the risks related to specialist shortages, as well as helping increase business effectiveness.

Increasingly often, shared services centers are implementing "de-languagification" of processes. By making communications more universal, one reduces operational risks, supports building backup structures and ensures a more flexible approach to customer service. Tools such as machine translation, OCR with language-specific features or integrated communications systems greatly limit the need to know numerous foreign languages in one's everyday work.

In my opinion, the need for local languages in the BSS industry will never truly vanish, but their role is unlikely to grow further. Thus, I'll answer the question about the future of languages in the industry in a somewhat unconventional way: for the BSS sector, these are currently Python and JavaScript – both proving key at a time of global technological transformation.



# The evolving demand for foreign languages in Shared Services Centers





#### Kamila Woźniakowska

Plant Manager Alorica





#### Małgorzata Karpińska

Member of the Board



Over the last ten years, the SSC/BPO industry has experienced a significant shift in demand for foreign language skills and I believe we will continue to see more and more changes when it comes to the languages desired across the industry.

The globalization and expansion of businesses into new international markets with diverse customer bases, is driving the need for increased multilingual support. Over the last ten years, we have witnessed changes when it comes to the most desirable languages such as Spanish, Italian, French, German, Dutch or Scandinavian languages. I believe the demand will also increase for Asian languages (especially Mandarin and Cantonese) in the coming years.

With the continuous evolution of the BPO linguistic landscape and a clear trend towards greater diversity in language requirements, technology will play a crucial role. A great example of innovative technology changing the landscape is Alorica ReVoLT – an AI-powered, real-time voice language translation technology that empowers agents to deliver native language support in 75 languages and over 200 dialects—offering Alorica's clients a truly competitive edge.

While I believe the demand for language expertise across our industry will remain high, the exact scope of work will likely differ. We will move away from previously learned language skills and towards more advanced expertise where AI and people "work" hand-in-hand to deliver personalized, intuitive service to their clients.

The past decade has brought notable changes in the demand for language skills in Polish business services centers. This was largely due to globalization, the growing market dynamics and evolving business priorities. English remains the primary language of communication and global business, remaining in high demand.

However, one can observe a steadily rising interest in German, due to Poland's heavy cooperation with the DACH region. At the beginning of this decade Russian language had also enjoyed a moderate demand, but geopolitical factors shifted this demand toward other CEE languages.

I believe that strong cooperation with Asian and Middle Eastern markets might lead to increased importance and demand for hitherto unpopular languages, such as Mandarin, Korean, Japanese or Turkish. When considering the future of foreign languages in the SSC sector, one should also take into account the influence of artificial intelligence, which is increasingly often reducing the need to utilize foreign languages in the case of some manual, repeatable or simpler tasks. Nevertheless, I believe that the demand for multilingual specialists remains high, perhaps even rising, especially when it concerns strategic, complex roles.



Poland's largest cities

# Poland's largest cities



#### Cracow





Population\* 30.06.2024 r.

807,600



People employed by BSS\*\*\*
ABSL 2024 r.

101,000



Unemployment\*\*
January 2025

2.1%



Apartments delivered to the market\*\*

January 2025

**584** 



Population in working age\* BDL 2023 r.

492,739



Number of BSS centers\*\*\*
ABSL 2024 r.

288



Average gross salary\*\*

Average monthly gross salary in the enterprise sector in January 2025 r.

PLN 10,422.71







#### Agata Jemioła

Branch Manager



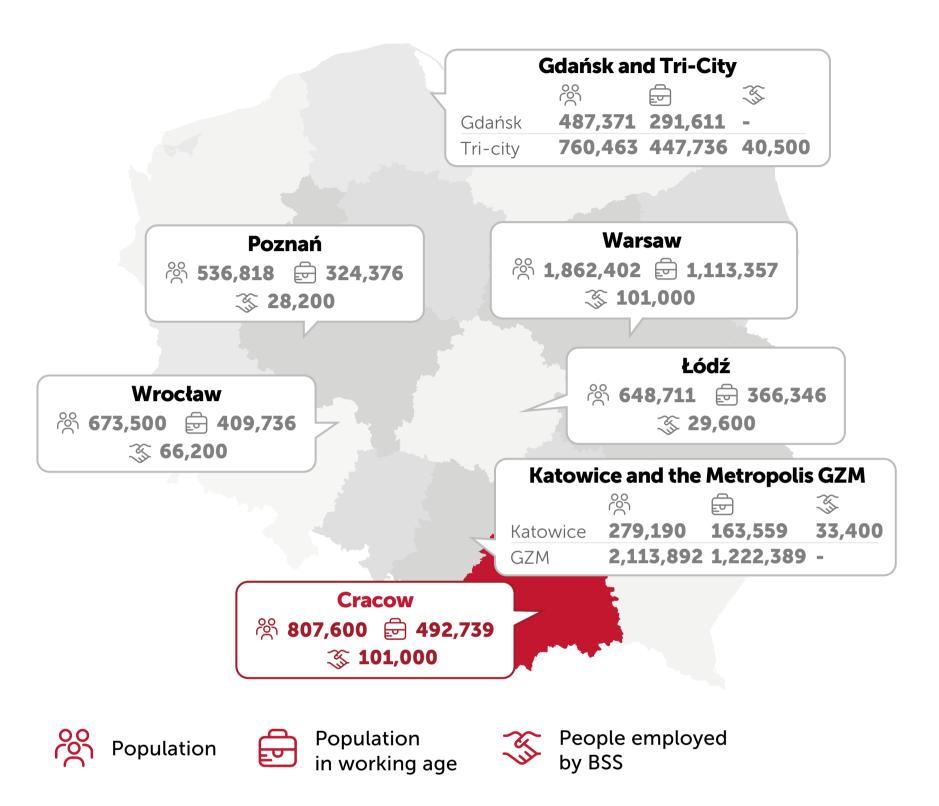
#### Cracow

Despite an uncertain market situation in 2024, Cracow entered 2025 on a high note. While many businesses have been limiting recruitment over the preceding 12 months – some even choosing to reduce employment – the annual summary shows that the number of SSC employees has largely increased. We're also already seeing international businesses growing bolder when it comes to new investments and increasing employment levels.

In the past year, the number of new investments in Cracow wasn't particularly high, however, signs are pointing toward the number of SSCs increasing over 2025 – we already know about several projects that could be implemented in the near future.

International businesses planning to open new SSC centers are often choosing Poland due to highly attractive investment locations such as Cracow. It is currently the nation's main SSC hub (aside from Warsaw), employing over 100,000 people across 288 companies.

From the investor perspective, Cracow is one of the best cities in Europe when it comes to access to experienced specialists fluent in various foreign languages. The city is home to some of Poland's leading universities such as the Jagiellonian University or AGH University, whose graduates are constantly flowing into the talent pool. It also bears mentioning that while Cracow isn't the cheapest city in Poland, labor costs here remain competitive as compared to the capital, forming a strong advantage in the eyes of investors.







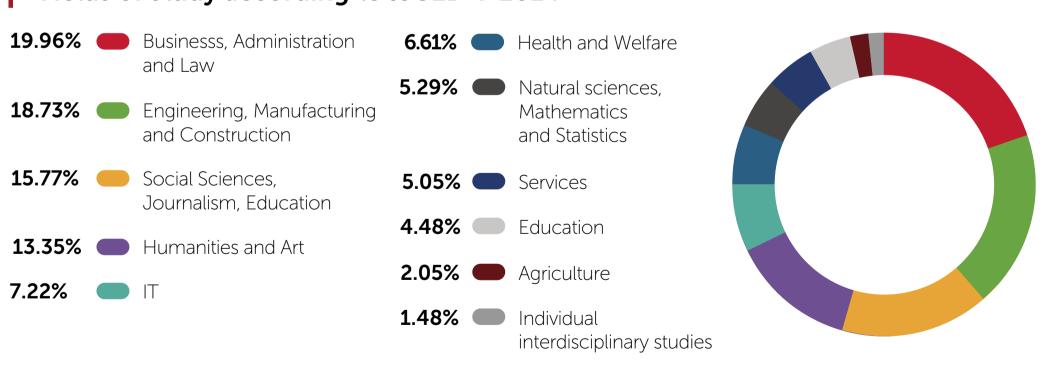
# Higher education

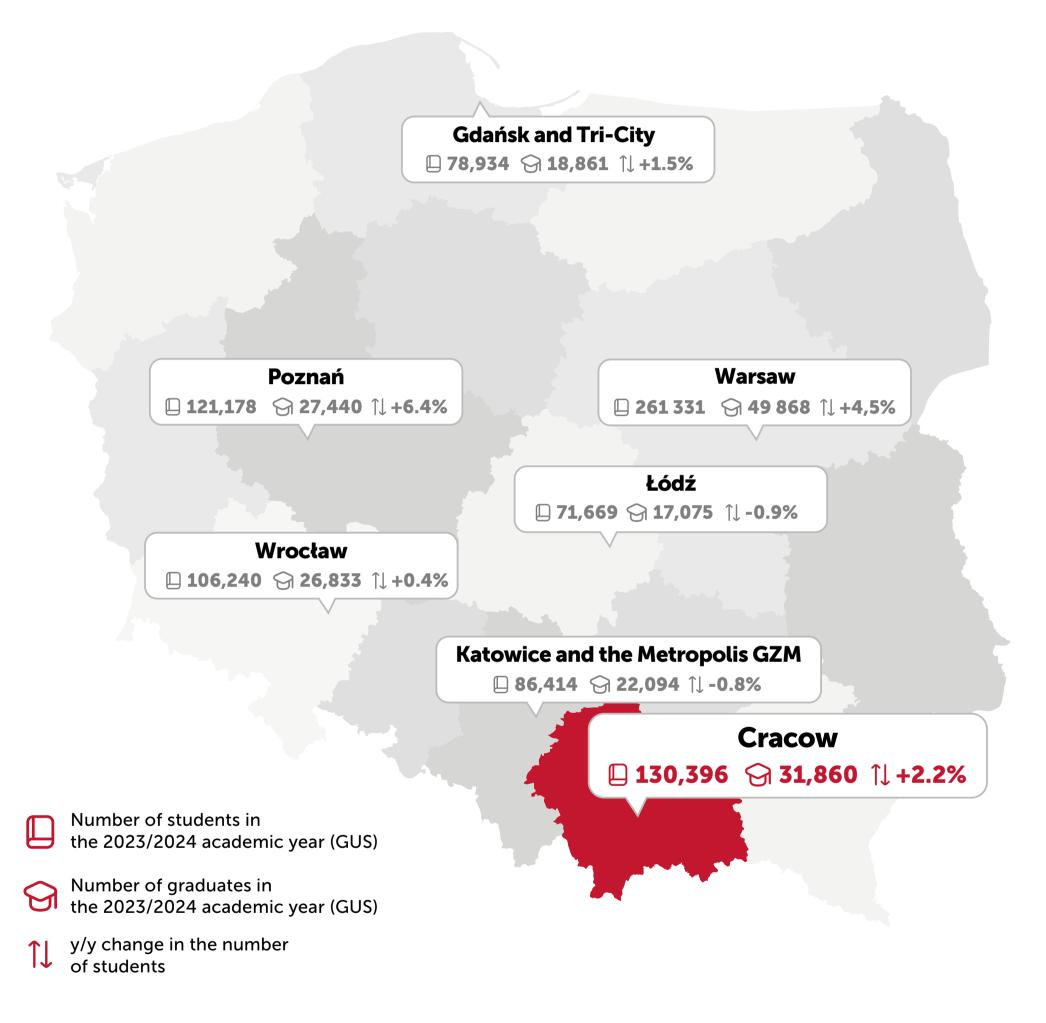
Cracow, one of Poland's largest academic hubs, houses over 130,000 students. The most popular faculties in Cracow concern business, administration and law, accounting for almost a fifth of all students.

They are closely followed by technology, industry and construction-related faculties. Students prefer faculties aligned with the skills and knowledge in demand on the job market.

Compared to the 2022/2023 academic year, the number of students has increased by 2.2% (y/y). Each year, almost 23,000 people graduate from Cracow's universities, greatly increasing the city's attractiveness in the eyes of potential investors.

#### Fields of study according to ISCED-F 2014









#### Katarzyna Wysocka

Director, Entrepreneurship and Innovation Department, Cracow City Hall



# **Business in Cracow? Absolutely!**

Cracow remains highly attractive for specialists despite high competition in the global market. It attracts people wishing to develop their talents by offering them opportunities to launch their careers and realize their ambitions. The city keeps welcoming new investors and pre-existing businesses keep expanding their operations and implementing further business projects. At the same time, the city is taking care of the resident's quality of life, cultivating a rich cultural, educational, sports and entertainment offer, as well as providing a strong sense of security.

#### An academic city

An undeniable advantage of Cracow is its people: specialists representing business or academia, as well as ambitious youth, open toward change and development. Many students and entrepreneurs are foreigners. Poland's largest academic hub consists of scientific staff and approximately 130,000 students spread across 23 universities as well as well-developed scientific and research infrastructure. As of writing, approx. 9,000 people are undergoing IT studies, appropriately reflecting market demand. It also bears mentioning the fact Cracow is among the handful of Polish cities with a growing population – according to estimates, at least a million people live and work here.



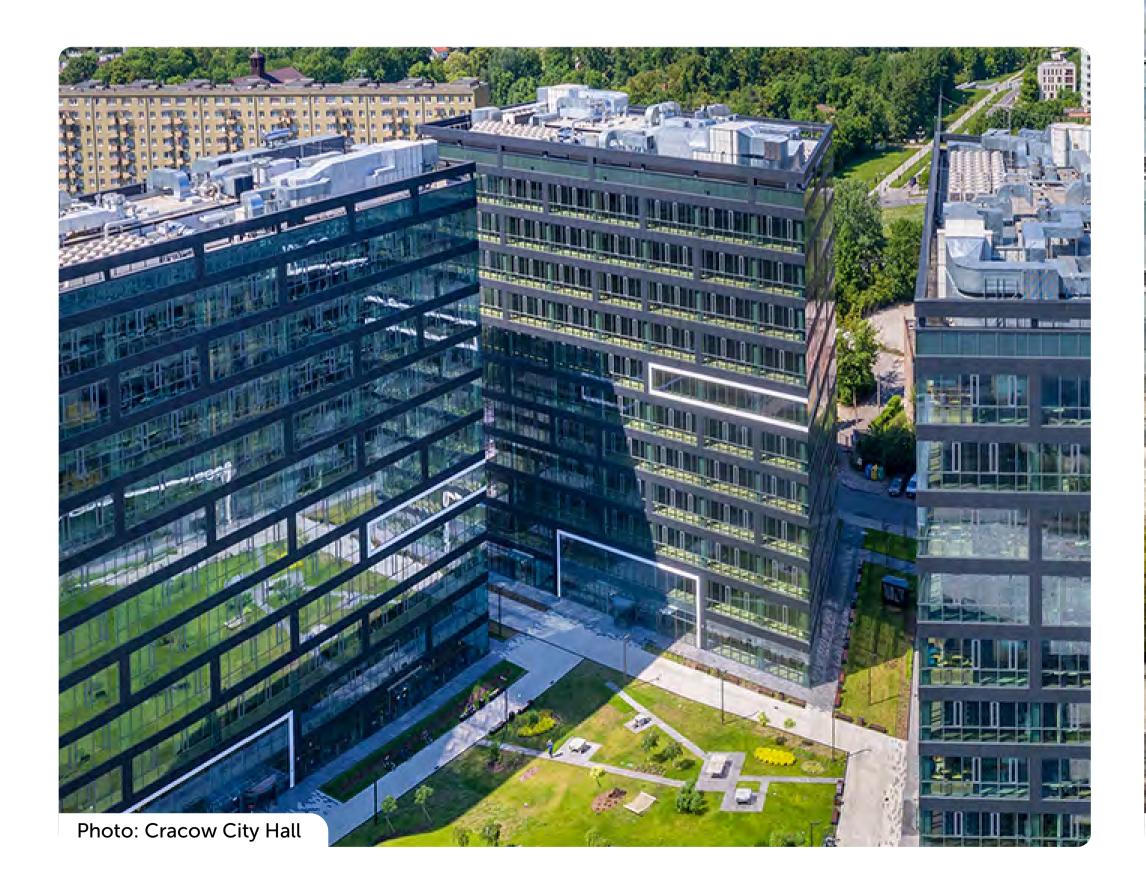


#### Technological advancement

As the European leader in terms of effectiveness for the modern business services industry, as of late Cracow has become a destination for a dynamic growth of research and development centers. We see investments from financial institutions and tech companies, as well as thriving start-ups. All of these industries, at every level – from sole proprietorships to global brands – are constantly growing and promoting innovation.



The dynamically growing BSS sector in Cracow now encompasses some 300 companies employing over 100,000 people. We also host over 500 tech businesses with almost 50 thousand IT workers.





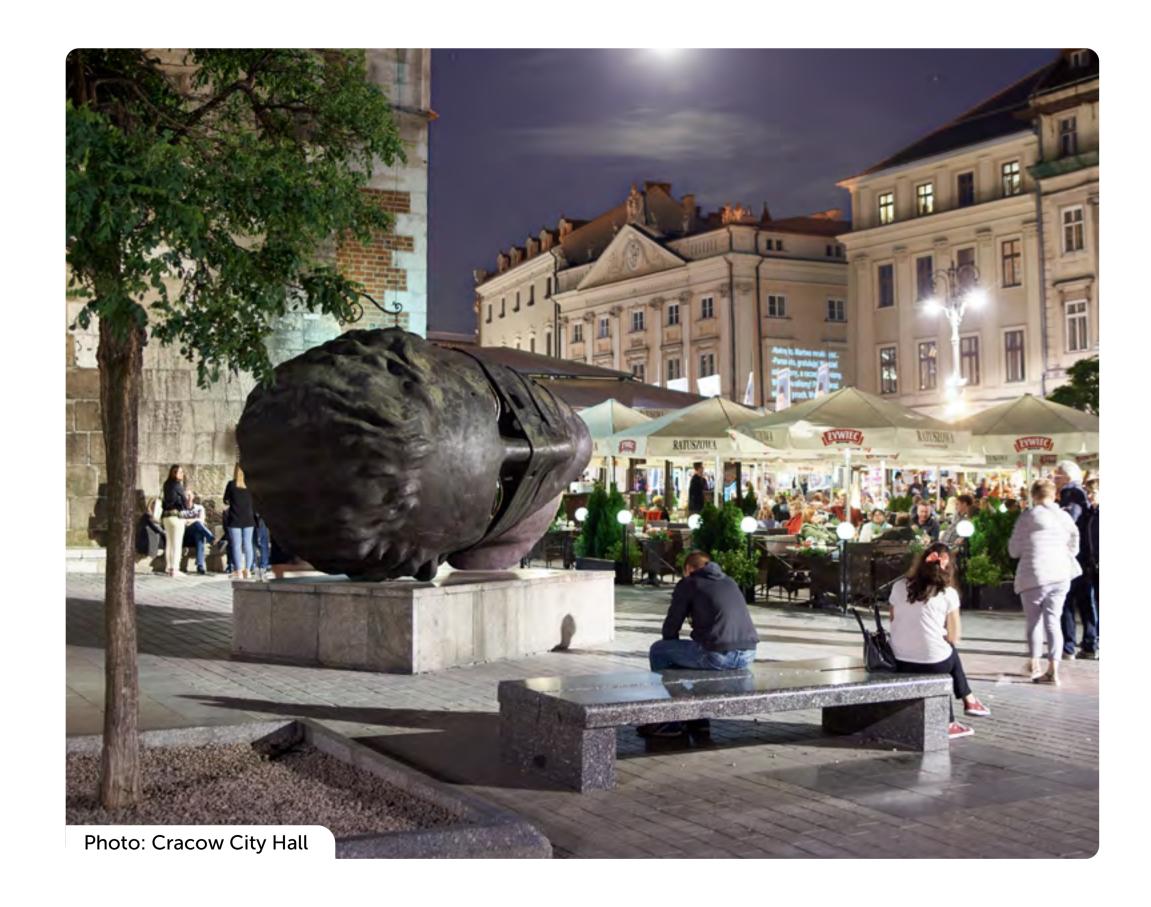


#### A knowledge-based economy

One of the city's important goals, covered by "Cracow's Development Strategy", is growing a knowledge-based economy competing with information, knowledge, innovation and people skills. In such an economy, highly qualified employees and experts are very important, as is carrying out scientific research, access to necessary infrastructure and creativity and courage. We have all of that – highly engaged academic and business cadres, while utilization of modern research infrastructure only requires appropriate co-operation. This is why we bank on building intersectional relations enabling effective cooperation between academia, business and local authorities.



By promoting innovation, Cracow is able to offer a great environment for developing modern business solutions, while a well-fitting technological ecosystem supports the creation of innovative startups. We're glad to see that their number is growing, making the city development much more dynamic. The products of Cracow-based companies are being used worldwide and the industry is gaining a greater recognition. Brands such as Brainly, HCM Deck, Airly, Synerise, endrone, CallPage, Upacjenta or Orbify, all among the fifteen most successful start-ups in Cracow, have amassed over USD 300 mln in investment.





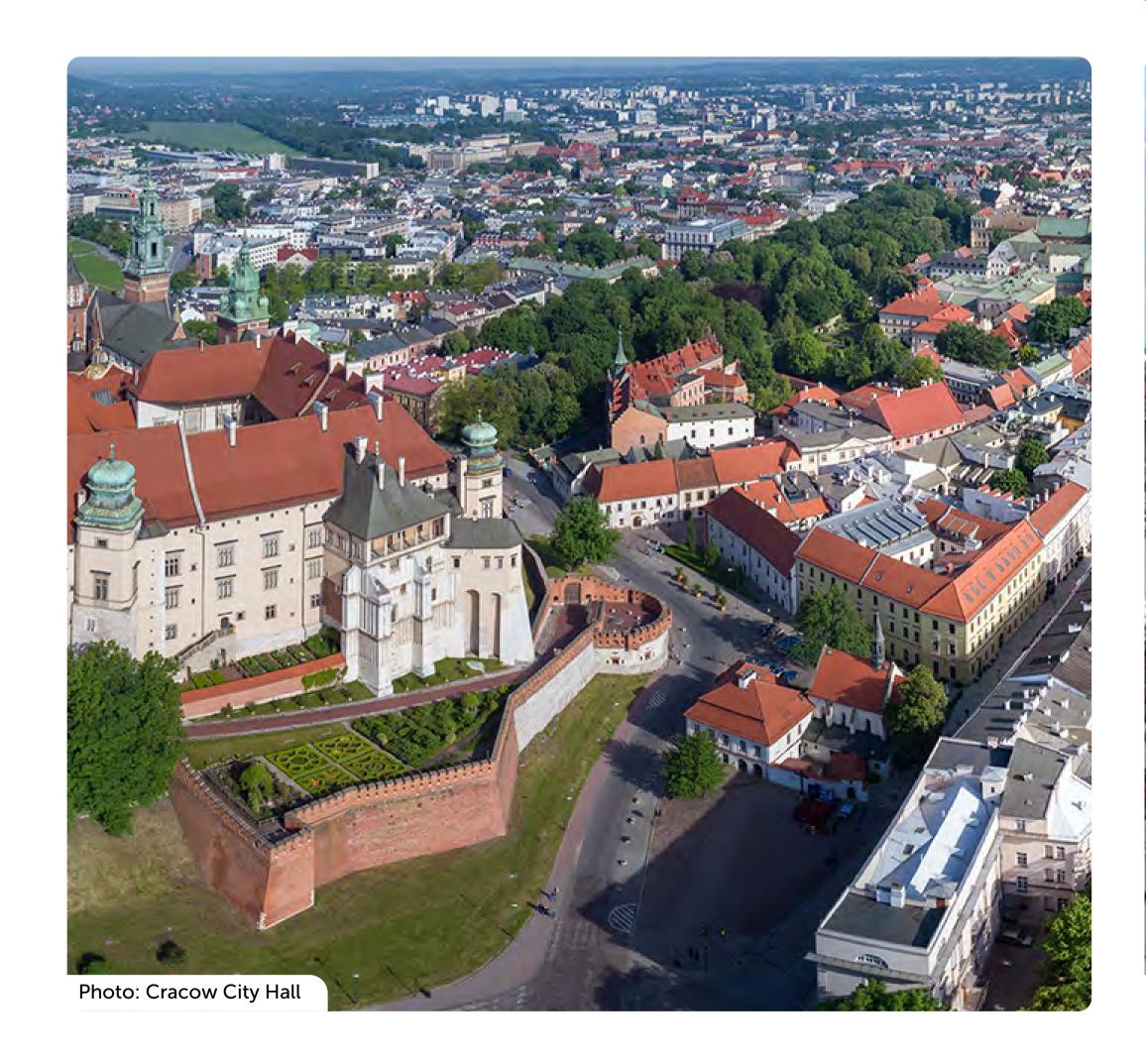


#### Good business location

Cracow's many advantages have led to a dynamic economic growth, which in turn attracts investors to whom the local authorities are offering versatile support on all stages of project implementation. Cracow's BSS and IT centers enjoy a well-established position as one on Central-Eastern Europe's major tech hubs that keeps growing, while retaining resilience and attractiveness even despite the global economic and social shake-ups.



In the past few years, Cracow has proven resilient to economic and social challenges borne by causes such as the pandemic or the war taking place near Poland's borders. The city is well-prepared to create new growth opportunities based on cooperation and multidimensional partnership of business, academia, local governance and residents.









#### **Rafał Oprocha**

Director, Cracow Region

#### **CBRE**

# Office Real Estate Market

In 2024, we have noted the highest demand on Cracow's office market in four years. The city keeps attracting the attention of international and domestic businesses alike, positively impacting the stable occupation of office space.

Among the key market trends we observed one should mention increased tenant interest in flexible office spaces and the growing popularity of hybrid work. These changes have led to optimizing office sizes and their functions, as well as increased demand for well-rounded office environments in the best, central locations.

Cracow still sees relatively little construction – in 2024, we noted the smallest increase in office space in almost 20 years. This means that the average vacancy rate should be falling, especially in the best locations with limited supply. We expect the market to retain a growth tendency and stable demand. However, the growth is unlikely to match the levels of earlier years.

Sustainable growth, operational cost-effectiveness and flexibility in usage of the space will remain key features of modern buildings, defining investment strategies of tenants. In response, the developers are increasingly often implementing mixed-use projects, combining offices with service and residential spaces, satisfying rigorous environmental standards and optimizing maintenance costs.





#### Warsaw



Population\* 30.06.2024 r.

1,862,402



People employed by BSS\*\*\* ABSL 2024 r.

101,000



Unemployment\*\*
January 2025

1.4%



Apartments delivered to the market\*\*

January 2025

1,242



Population in working age\* BDL 2023 r.

1,113,357



Number of BSS centers\*\*\*
ABSL 2024 r.

**376** 



Average gross salary\*\*

Average monthly gross salary in the enterprise sector in January 2025 r.

PLN 10,177.01



<sup>\*\*</sup> https://statystykamiast.stat.gov.pl/





<sup>\*\*\*</sup> Source: "Sektor nowoczesnych usług biznesowych w Polsce 2024" report by ABSL



#### **Mateusz Skiba**

Client Relationship Manager & Internal Trainer

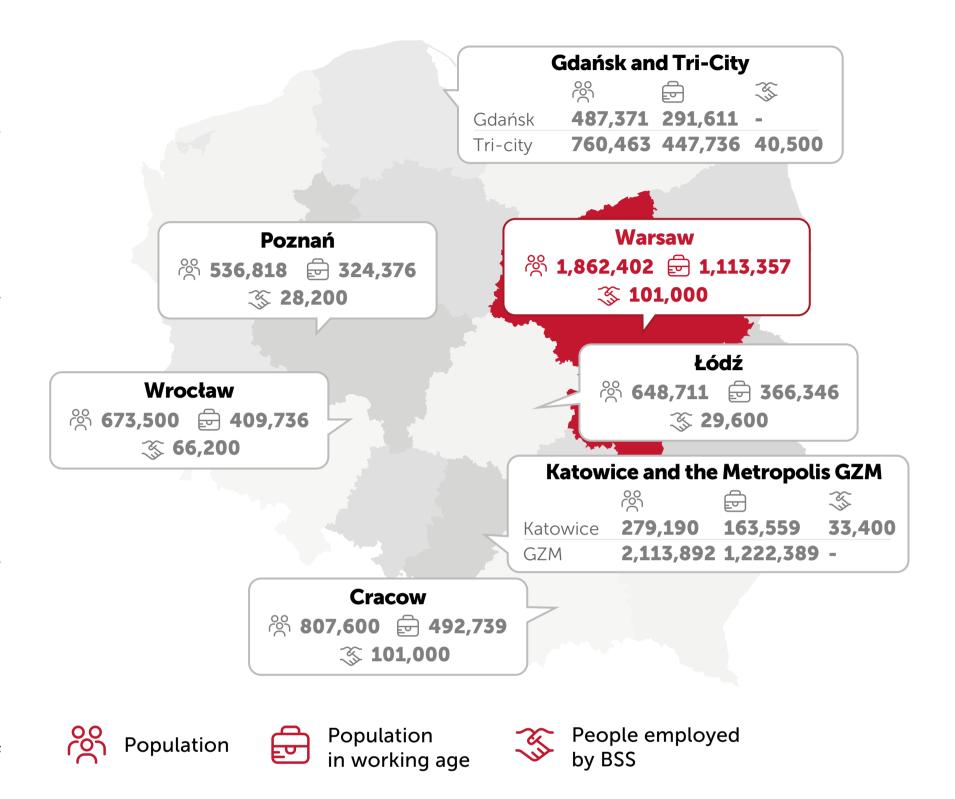


#### Warsaw

Over 370 shared services centers and breaching – along with Cracow – the threshold of 100,000 employees – are speaking for themselves. Warsaw is an unquestionable leader in the modern business services sector, which in the previous year bolstered its position, confirming Poland's high rank in the SSC/BPO industry.

2025 is looking transformational for many companies in the industry, many of which have already shown flexibility, innovation and adaptability over the past year. In the coming months, these changes will only prove even more noticeable, especially in areas such as salary reviews or implementing corrective measures to attract the best specialists available on the market.

Warsaw is a brand in itself – it doesn't need special investment incentives. At the same time, no other city in Poland is facing comparable difficulties in terms of high living and labor costs, which far exceed the national average. This means the capital is competing primarily through quality, rather than price. This, in turn, attracts advanced and highly automated processes. The maturity of the Warsaw market when paired with the dynamic growth of artificial intelligence and the technological revolution lets us assume that the modern business services sector is entering a new stage of its evolution.



This evolution is more than merely a challenge – it's an opportunity. Even

if it leads to some employment reduction in the sector, the growing importance of productivity, innovation and automation opens the doors for new, promising positions, departments and capabilities. At the same time, it requires the employees to keep increasing their qualifications and skills, leading to both business growth and the entire organization.

However, people remain at the very center of these changes. Organizations are increasingly focused on ensuring the best possible work conditions, stressing general well-being, mental health and flexibility – such as hybrid work, which predominates in Warsaw as the favored model.





# Higher education

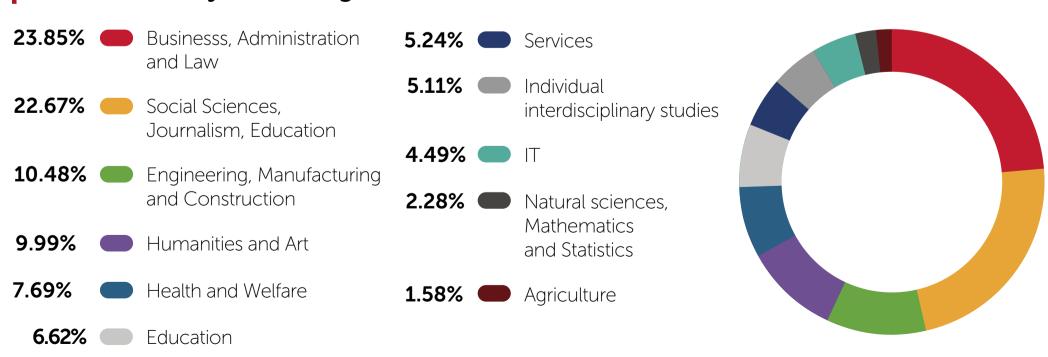
There are 261,000 people studying in Poland's capital. Compared to the 2021/2022 academic year, the number of students has grown by 4.5% – marking the second-highest growth in Poland.

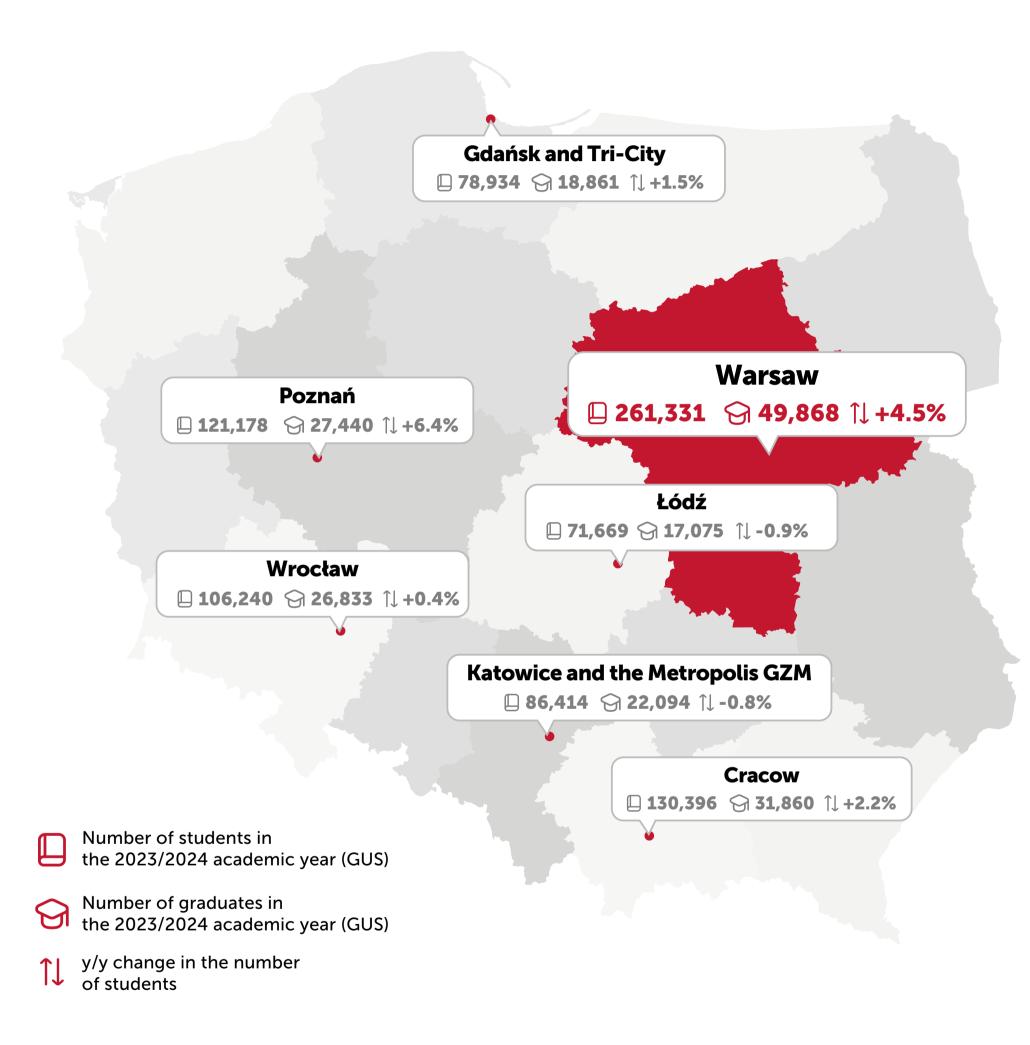
The most chosen faculties encompass business, administration and law, which account for almost 24% of all students. They provide great opportunities for stable employment and career growth in many sectors, therefore their ongoing popularity should be of little surprise.

Social sciences, journalism and information studies also remain quite popular, accounting for over 22% of all students. As the country's capital and the center of its political life, Warsaw houses key national and administrative institutions, as well as the headquarters of key international institutions. This makes it a bonafide magnet for people interested in politics, as well as the aforementioned law and administration.

The third most popular group is formed by faculties concerning technology, industry and construction. They account for 10.48% of Warsaw's students.

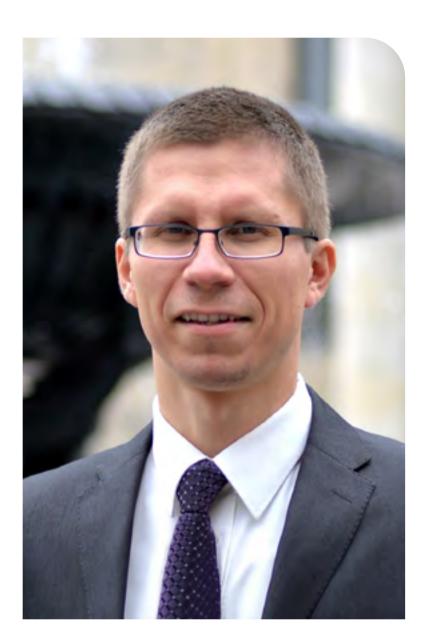
#### Fields of study according to ISCED-F 2014











# Warsaw - Smart people. Smart technology. Smart city.

Warsaw is not only the country's main economic and business center, but even more importantly a friendly and open-minded city. High quality of life, qualified employees, leading universities and a broad cultural and entertainment offer are among the city's many advantages.

This is reflected in Warsaw's placement in renowned international rankings. The rate of its economic development and entrepreneurship are among its most appreciated aspects. For example, the latest European Cities and Regions of the Future 2025) ranking by fDi Intelligence placed Warsaw in the top 3 most attractive European cities to invest in.

#### An attractive business destination

Warsaw's friendliness towards business has long been rated as among the best in Europe. The city is attracting numerous international corporations, opening their headquarters, R&D centers and shared business services centers here. Global players such as Google, JP Morgan or Moderna, international corporations, domestic enterprises and start-ups alike are all finding an advantageous environment for their business operations.

#### Maciej Fijałkowski

Secretary, Warsaw City Hall







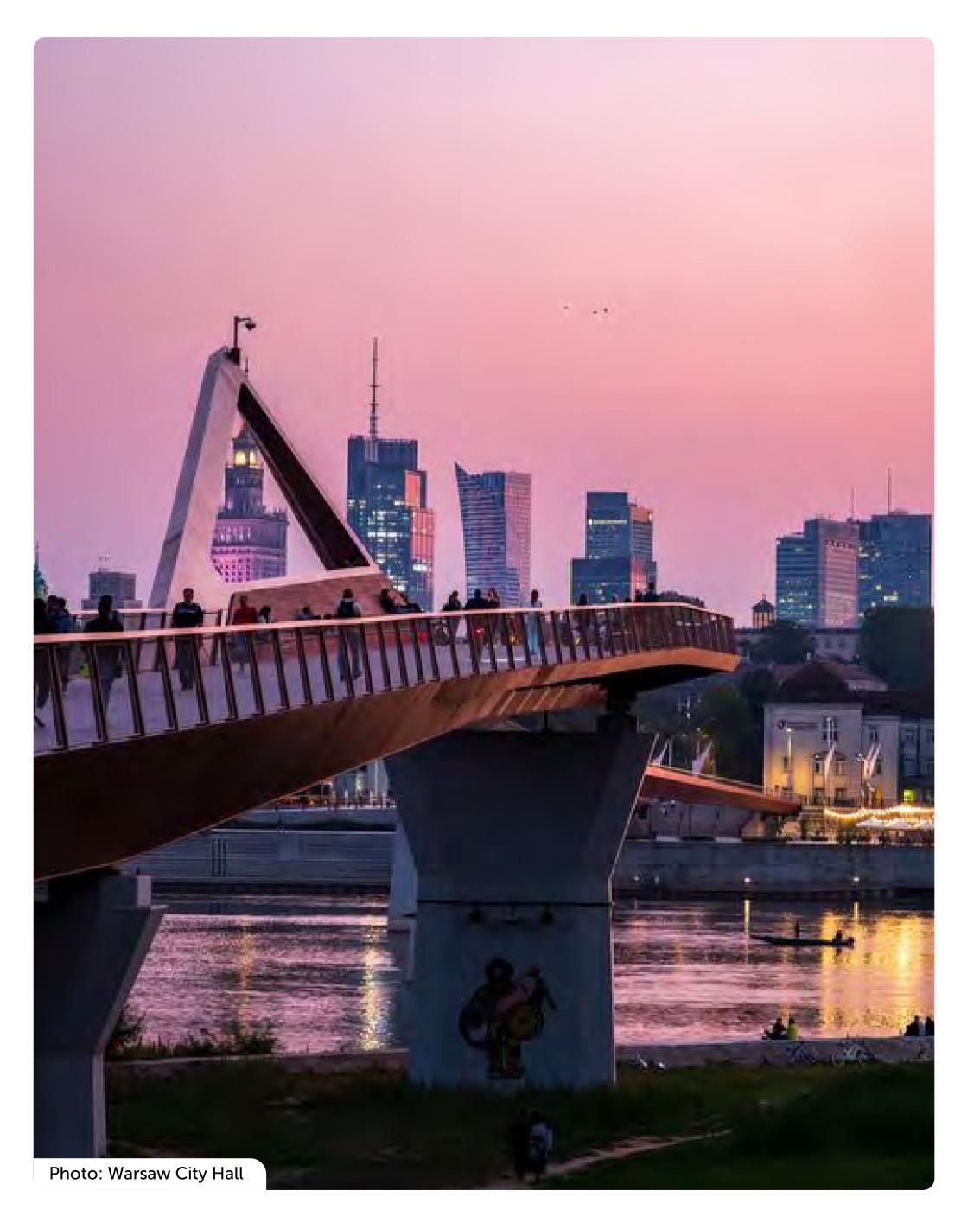


Warsaw is the nation's leader in terms of the number of active centers – at 376, employing 101 thousand people. SSC/GBS (Shared Services/Global Business Services), IT (Information Technology) and BPO (Business Process Outsourcing) centers are their most popular types, employing over 85% of specialists in Warsaw's sector.

#### **Key Sectors**

The leading sectors of Warsaw's economy include the creative sector, modern business services and start-up support centers for Eastern Europe. The Business Services Sector is characterized by a particularly dynamic growth speed. Warsaw is the nation's leader in terms of the number of active centers – at 376, employing 101 thousand people. SSC/GBS (Shared Services/Global Business Services), IT (Information Technology) and BPO (Business Process Outsourcing) centers are their most popular types, employing over 85% of specialists in Warsaw's sector. An ABSL ranking based on a survey among managers declared Warsaw to be the best location for business operations in Poland.

Warsaw is also becoming a notable technological hub for the CEE region. Industries noting particularly dynamic growth include fintech, gamedev and Al. As of writing, the capital is home to almost half of Polish fintech and Al businesses. The European Best Destination ranking, published in the online edition of Forbes gave Warsaw the top spot among the ten best European destinations for IT investment.









#### The city of talents

As the nation's largest academic hub, Poland's capital is home to 68 prestigious universities, with the highest number of students, at over 260,000. This rich academic environment ensures a steady annual influx of approx. 50,000 graduates ready to enter the labor market.

Thanks to the large number of enterprises and the largest office market (at over 6.2 mln m2 of office space), Warsaw keeps placing high in terms of attractiveness of direct foreign investments. In a review by fDi Intelligence, Warsaw's human capital and quality of life were assessed as the second most attractive in Europe.

#### **Quality of life**

Thanks to the increasingly good conditions for living and developing innovative businesses, Warsaw keeps attracting new residents and investors.

The capital is utilizing digital and telecommunication technologies to improve the quality of life of its residents. The city's efforts were noticed in the European Commission's contest "The European Capital of Innovation Award 2023 - iCapital", in which Warsaw took second place. The jury appreciated its steady development of the urban innovation ecosystem.

A well-developed, modern infrastructure, including public transportation, is another important factor for selecting Warsaw as an investment destination. 2024 held particular importance for municipal public transport, and especially Warsaw's tramways, as it saw the launch of three new tramway routes with over 10 kilometers of combined length. The longest route – approximately 6.5 km long – leading to the Wilanów district was completed in late October. It's the single longest tram route in Warsaw since the 50s. Moreover, the year saw the opening of Poland's largest and most modern tram depot in Annopol. And on top of all of that, Warsaw's subway system is constantly being expanded. As of writing, works are underway to complete the second subway line, while the first stage of a third one is under active planning. And if that wasn't enough, September 2024 saw the pre-planning works for a fourth subway line.



Warsaw has plenty of green areas. According to Forbes magazine, Warsaw is among the 10 recommended green European capitals to visit in 2025. The city encompasses 80 parks, including the newly opened Operation Tempest Park, located near the Warsaw Uprising Mound. In 2024, it received a European award for the best urban area. Warsaw has exceptional atmosphere for both residents and businesses. I warmly invite everyone to come visit Warsaw and find out for themselves how great it is to live in!

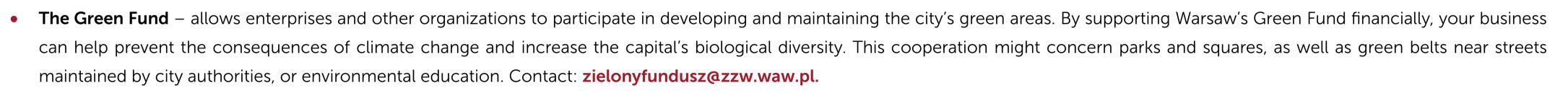
# Cooperation between Warsaw City Hall and businesses

We welcome representatives of the business world to get involved in the sustainable development of our city. These activities will lead to the creation of Warsaw's image as an open and supportive capital and help local businesses implement sustainable growth solutions. They will also help co-create the place in which we all live and work every day.

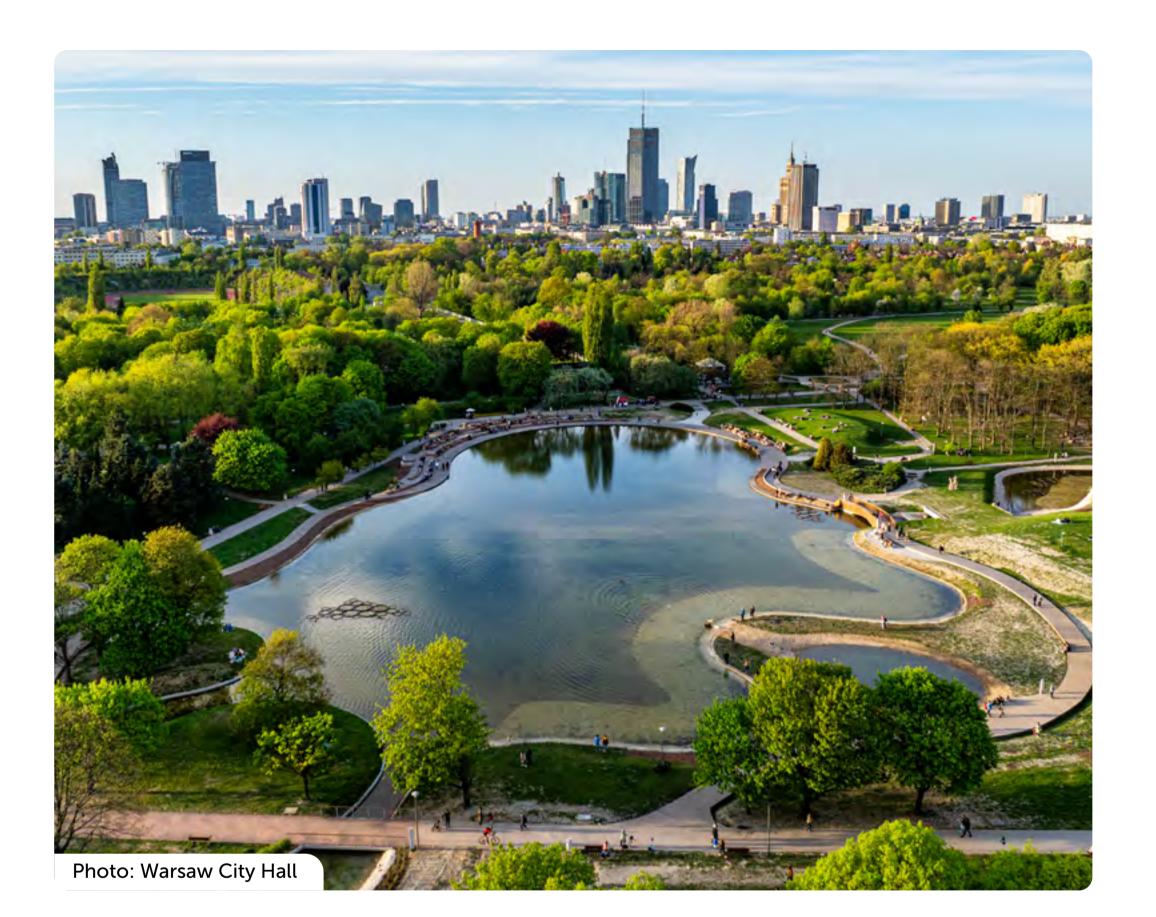
Cooperation between the City Hall and businesses will help us achieve crucial goals:

- supporting and promoting diversity and increasing social cohesion,
- counteracting inequalities and supporting the development of local communities,
- better support for the city's green areas and increasing ecological awareness,
- Promoting and implementing volunteer initiatives.

#### We offer cooperation in three key areas:



- Social Diversity Fund encompassing projects addressing various social groups in Warsaw. The Fund operates a project catalog, regularly updated with new initiatives. The proposals contained therein are merely a starting point the city is open to discussing the exact scope and form of any potential cooperation. Contact: inicjatywafrs@um.warszawa.pl.
- The Urban Volunteer Portal https://ochotnicy.waw.pl/ a website facilitating search for volunteers in Warsaw. It lists approx. 100 diverse proposals for volunteering in Warsaw and allows for searching currently available offers, including activities supporting companies. In addition, the portal also provides useful materials on organizing corporate volunteering. Contact: ochotnicy@um.warszawa.pl.







#### Radosław Pawlak

Director, Warsaw Region



# Office Real Estate Market

In 2024, the demand on Warsaw's office market was similar to that from 2023. Tenant activity remains high and one could call this a period of stabilization. In Q4 2024, the capital saw completion of several large transactions, including the largest office building sale in Europe – an event we perceive as a very positive signal from the market.

Warsaw's office market is highly diversified, with the two main office districts greatly differing from each other. Bliska Wola is characterized by high demand and low vacancy rate, limiting the options for businesses seeking large spaces near the downtown. On the other hand, the somewhat more distant Służewiec shows a strong trend of converting office buildings for new uses.

In 2024, the approach to hybrid work has shifted. Previously, the baseline standard amounted to 2 office days and 3 remote days a week. Now, the situation is changing and the amount of stationary work is increasing. According to the "European Office Occupier Sentiment Survey 2024" carried out by CBRE, the percentage of people working out of an office for at least 3 days a week has grown from 37% to 43% among European companies. Adjusting the office to a given organization's needs and its style of work is a key matter for many tenants, which in turn impacts the duration of rental agreements, which now tend to span 7-10 years.





#### Wrocław



Population\* 30.06.2024 r.

673,500



People employed by BSS\*\*\*
ABSL 2024 r.

66,200



Unemployment\*\*
January 2025

**1.7**%



Apartments delivered to the market\*\*
January 2025

463



Population in working age\* BDL 2023 r.

409,736



Number of BSS centers\*\*\*
ABSL 2024 r.

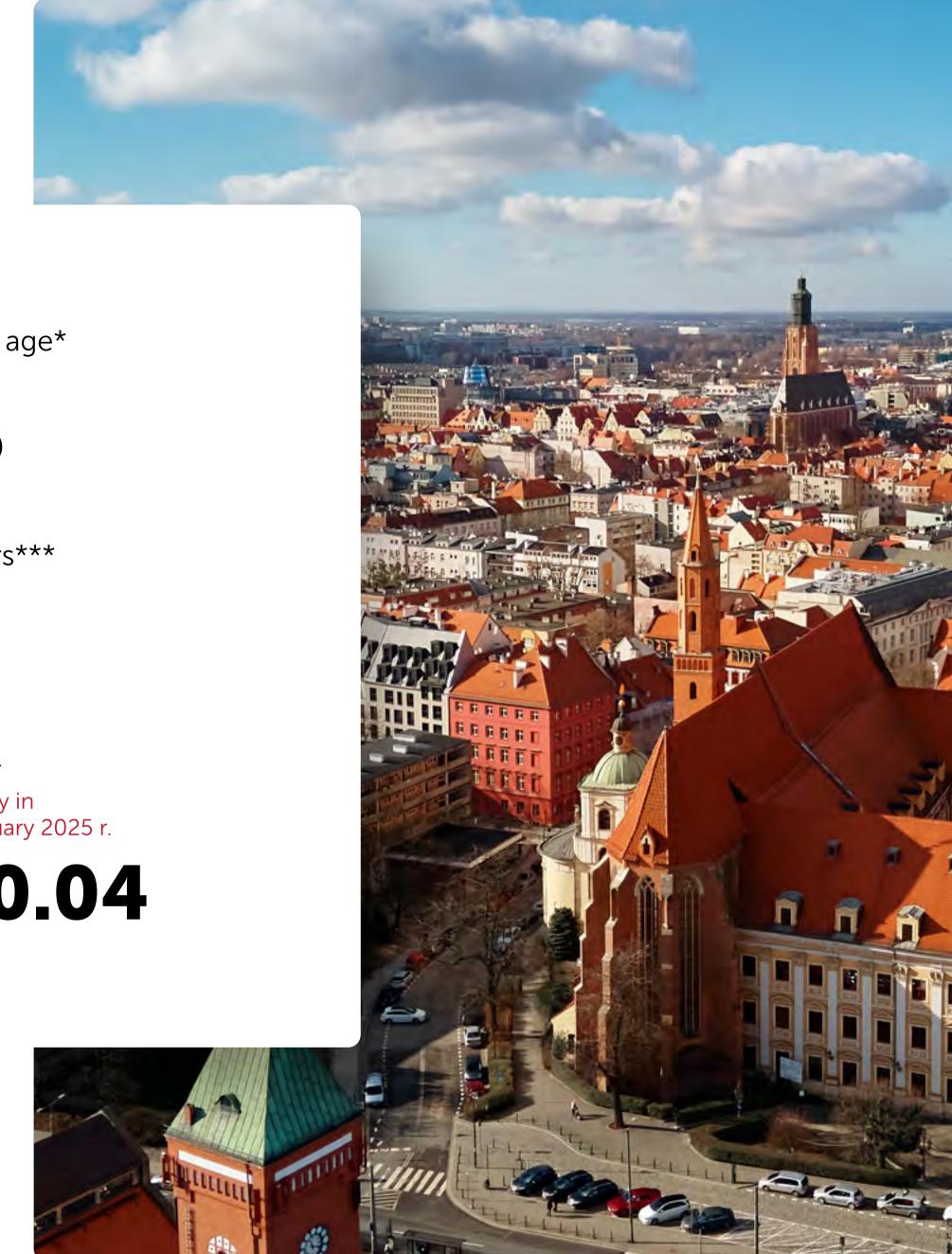
234



Average gross salary\*\*

Average monthly gross salary in the enterprise sector in January 2025 r.

PLN 9,440.04





<sup>\*</sup> Source: Population in pre-working age (under 18 years), working age and retirement age by sex, GUS BDL 2023

<sup>\*\*</sup> https://statystykamiast.stat.gov.pl/

<sup>\*\*\*</sup> Source: "Sektor nowoczesnych usług biznesowych w Polsce 2024" report by ABSL



#### Dagmara Jaworecka

Regional Division Manager



#### Wrocław

For years, Wrocław has been one of Poland's major SSC/BPO hubs, attracting investors with well-educated employees and highly developed business infrastructure. In 2025, the city is continuing to develop this industry, which is reflected by the ongoing investments and demand for specialists.

Despite a lack of dynamic growth in the previous year, with the sector largely just consolidating its position, Wrocław has still seen several new investments, expansion of the pre-existing business centers and relocation of strategic, global roles to Poland.

One could definitely notice a drop in the number of high-volume projects, leading to rather limited employment increases for individual clients. It's an effect of labor market maturity, which keeps consolidating its position each and every year. Unique competencies are being highly appreciated and fluency in foreign languages has become key. Aside from the commonly required English language, candidates proficient in German, French and Spanish are in particularly high demand.

The minimum wage in Poland has once again increased on January 1st 2025, influencing the budgets and salary strategies in the SSC/BPO sector. When analyzing the labor market dynamics, employees are adjusting the

**Gdańsk and Tri-City** 487,371 291,611 760,463 447,736 40,500 Warsaw Poznań **№ 536,818 ⊕ 324,376 3 101,000 3 28,200** Łódź **№ 648,711 ⊕ 366,346** Wrocław **№ 673,500 409,736 3** 29,600 **35** 66,200 Katowice and the Metropolis GZM Katowice **279,190 163,559 33,400** 2,113,892 1,222,389 -Cracow **№ 807,600 ⊕ 492,739 3 101,000** People employed Population Population in working age by BSS

rates and financial offers to candidate expectations, while taking care of the current employees through pay raises. The growing operational costs within the sector are leading the companies to carry out business transformations, optimizations and process streamlining. Investments in new technologies are also becoming increasingly important. Another notable trend involves the creation of hybrid positions linking competencies and obligations of several roles.

Wrocław is regularly placing high in Polish and foreign rankings of best cities to live, work and grow in, distinguishing it on a national scale. Candidates across Poland are increasingly willing to relocate and Wrocław is often proving their preferred destination.

In 2025, the city will continue strengthening its position as a key SSC/BPO sector in Poland, offering an attractive environment for investors, as well as providing wide opportunities for professional growth for the specialists.



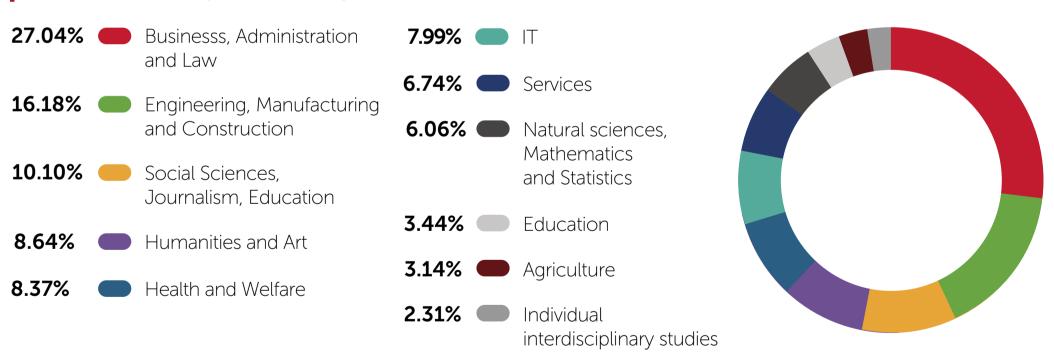


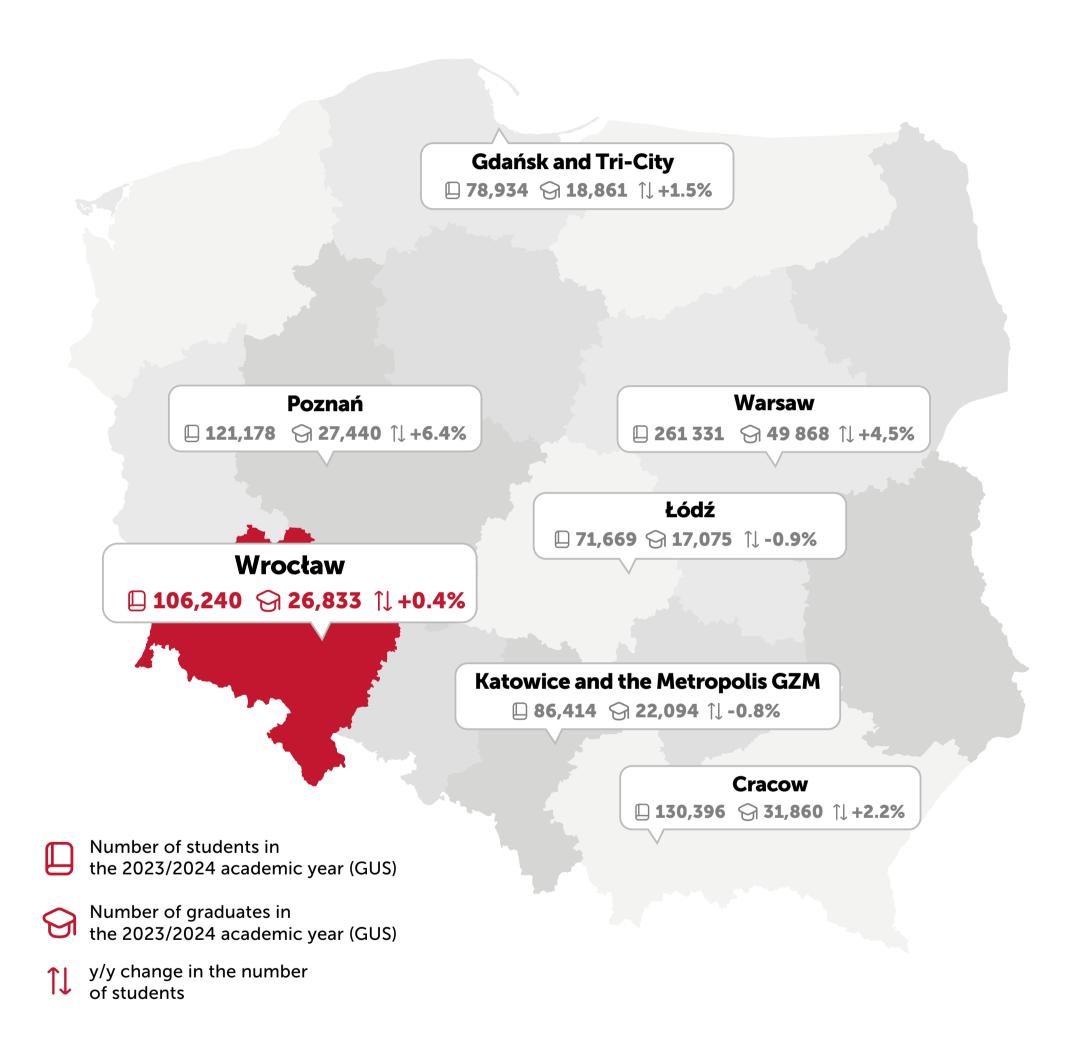
## Higher education

In the 2023/2024 academic year, over 106,000 people have chosen to study in Wrocław. The number of students in Lower Silesia's capital increased by merely 0.4% (as compared to the 2022/23 academic year), but nevertheless, Wrocław remains among the top academic cities.

In the 2023/24 year, as in the preceding one, a little over a quarter (27.04%) of students in Warsaw chose business, administration and law faculties. They were followed by technical, industry and construction-related faculties, accounting for a combined 16.18% of all students.

#### Fields of study according to ISCED-F 2014









### Magdalena Okulowska

President of the Management Board, ARAW S.A.



# Wrocław – the city where business gets the green light

Lower Silesia's capital is steadily strengthening its position on Poland's economic map, attracting new investors and creating favorable conditions for business development – from innovative start-ups to international corporations.

#### Why are the investors choosing Wrocław?

Wrocław is located at the crossroads of key European communication routes, providing comfortable access to an international airport and modern infrastructure. These are undeniable advantages, which attract investors from across the entire world. The city provides them with comprehensive advice and help at all stages – from choosing the location to integration with the local ecosystem, through means such as the activities of the Wrocław Agglomeration Development Agency (ARAW), which for the past 20 years has been effectively linking the interests of businesses, academia and the local community.

In the past year alone, Lower Silesia's capital saw over 20 investment projects being implemented in the IT, automotive and industrial manufacturing sectors. Wrocław's business map was enriched by new, notable companies such as Solventum, Walki, Lapp, Bosch and Mercedes-Benz.



Wrocław is a business-friendly city, with human capital of the highest quality. In the previous year, we reached the top spots in the fDi Magazine "European Cities and Regions of the Future 2024" ranking, further confirming our involvement in the region's development. But Wrocław's role doesn't end with attracting the investors. We wish to be a partner supporting them from the very first steps, until the full market integration.

#### **Aneta Herbuś**

Head of the Investor Service Department, ARAW



**Business services 2025** 



#### Promotion on a wide scale

Wrocław's authorities understand that a city's promotion must exceed far beyond the region itself. This is why we're actively participating in such international events as the MIPIM in Cannes or the Web Summit in Lisbon, presenting Wrocław's potential to global business leaders.

On the local market, the Made in Wrocław conference is a flagship business event. In 2024, this annual conference organized by the Wrocław Agglomeration Development Agency (ARAW) took the slogan "Stage of Knowledge". This unique event attracted almost 2,000 participants, including representatives of business, academia, local authorities and residents alike. Aside from the conference itself and an expo zone, the event saw the launch of the VC Demo Day initiative, providing the start-ups with a chance to network and present themselves to potential investors.





#### Investing in people and the future

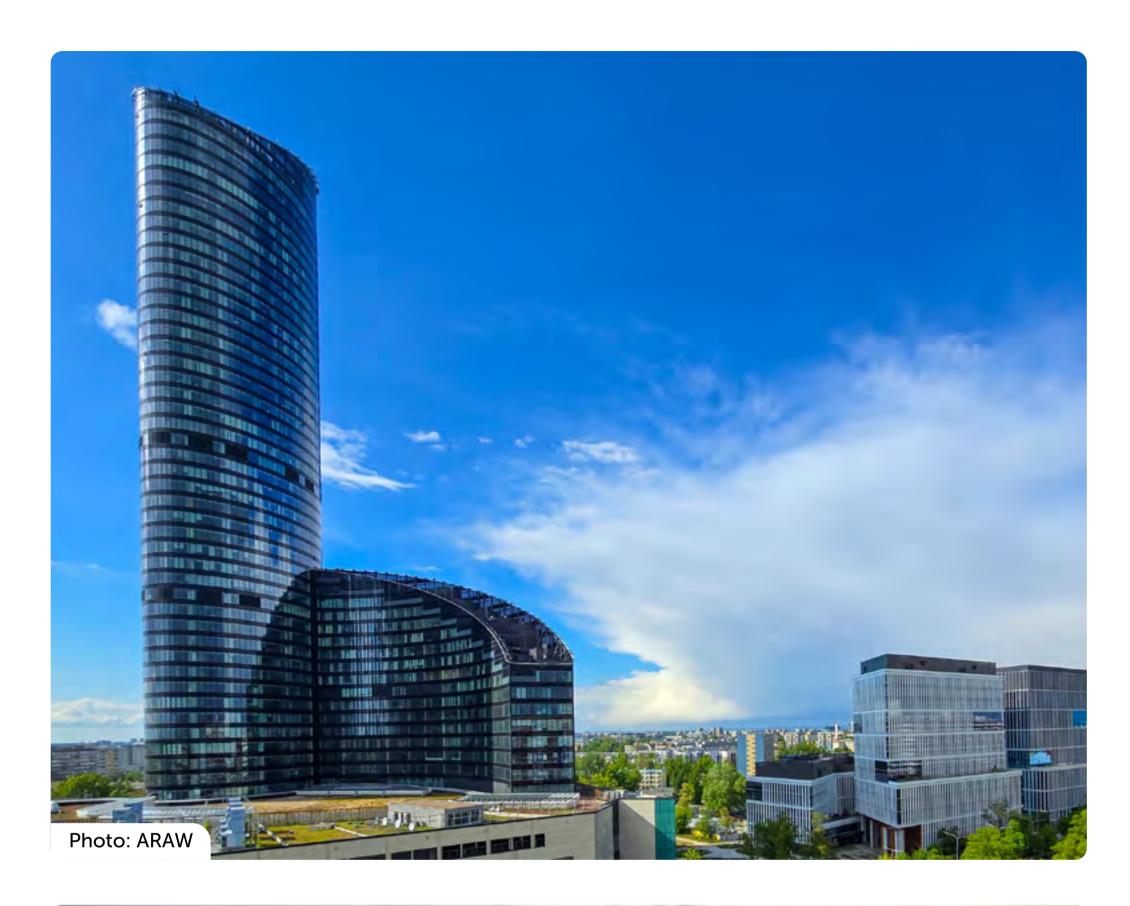
Wrocław's economic success is based on human capital. The "STEM – chart your future" campaign, supported by global businesses such as 3M or Collins Aerospace, supports young people – especially girls – to choose career paths in STEM disciplines.

Furthermore, new publications such as the "Research and Development Potential in the Wroclaw Agglomeration" report and the "Driven by Knowledge, People & Innovation 2024" guide are highlighting Wrocław as a place where talent, knowledge and innovative solutions meet, creating a perfect environment for businesses planning future investment.

There's a good reason why Lower Silesia is often called Poland's Silicon Valley, with Wrocław at its helm. Young businesses and start-ups can expect support and great growth opportunities. Initiatives such as Startup WRO Meetup or Evolutions Meetup & Showcase create a space for innovators who need opportunities to present their ideas, receive feedback and make contact with potential investors. It's projects like these that turn Wrocław into Poland's technology and innovation leader.









#### An ecosystem of cooperation

The past year has proven that Wrocław is keeping up the pace. Thanks to its well-thought-out strategy, the city creates an environment that allows global corporations, start-ups and local businesses to all succeed together.



Our ambitions are to create a sustainable ecosystem allowing everyone from start-ups to global corporations to feel at home and find growth opportunities. At this time of ongoing economic difficulties, cooperation and ecosystem integration are fundamental matters. They allowed us to attract new projects to Wrocław's agglomeration, encompassing both manufacturing and modern business services sectors. The developing technological environment and Poland's leading start-up ecosystem allow us to not only open the new year on a high note but do so for the entire decade. In the coming years, we will continue striving for Wrocław to become an even more recognizable innovation hub.

#### Magdalena Okulowska

Chairwoman, Wrocław Agglomeration Development Agency (ARAW)





#### **Paweł Boczar**

Director, Wrocław Region

## **CBRE**

# Office real estate market

In 2024, the demand for office real estate in Wrocław has remained at a level similar to 2021 or 2023. However, we noted a decrease in tenant activity by 13% as compared to 2023. Most transactions on the market concerned extending pre-existing rental agreements, often combined with renegotiating rental terms, optimizing office space, or obtaining funds to implement changes to the rented space.

New agreements, accounting for only 40% of the overall demand, included both relocations and new entities entering Wrocław. This part of the market has been dominated by smaller transactions, concerning spaces under 1,000 m2 on average.

In 2025, only one new office building is scheduled to enter the market in Wrocław. No new completions are planned for 2026. We expect the total available office space in 2025 to exceed 1.4 mln m2.

In Q3 2024, the vacancy rate reached its historical high for Wrocław, at 19.7%. Due to the very limited supply of new office projects, we think that in the coming years the vacancy rate is set to decrease.





# Gdańsk and Tri-City

**Gdańsk and Tri-City** 



Population\* 30.06.2024 r.

**487,371** Gdańsk **760,463** Trójmiasto



People employed by BSS\*\*\*
ABSL 2024 r.

40,500



Unemployment\*\*
January 2025

2.6%



Apartments delivered to the market\*\*

January 2025

201



Population in working age\* BDL 2023 r.

**291,611** Gdańsk **447,736** Trójmiasto



Number of BSS centers\*\*\*

ABSL 2024 r.

209



Average gross salary\*\*
Average monthly gross salary in the enterprise sector in January 2025 r.

PLN 9,894.54





<sup>\*</sup> Source: Population in pre-working age (under 18 years), working age and retirement age by sex, GUS BDL 2023

<sup>\*\*</sup> https://statystykamiast.stat.gov.pl/

<sup>\*\*\*</sup> Source: "Sektor nowoczesnych usług biznesowych w Polsce 2024" report by ABSL



### Monika Piądło

Regional Manager

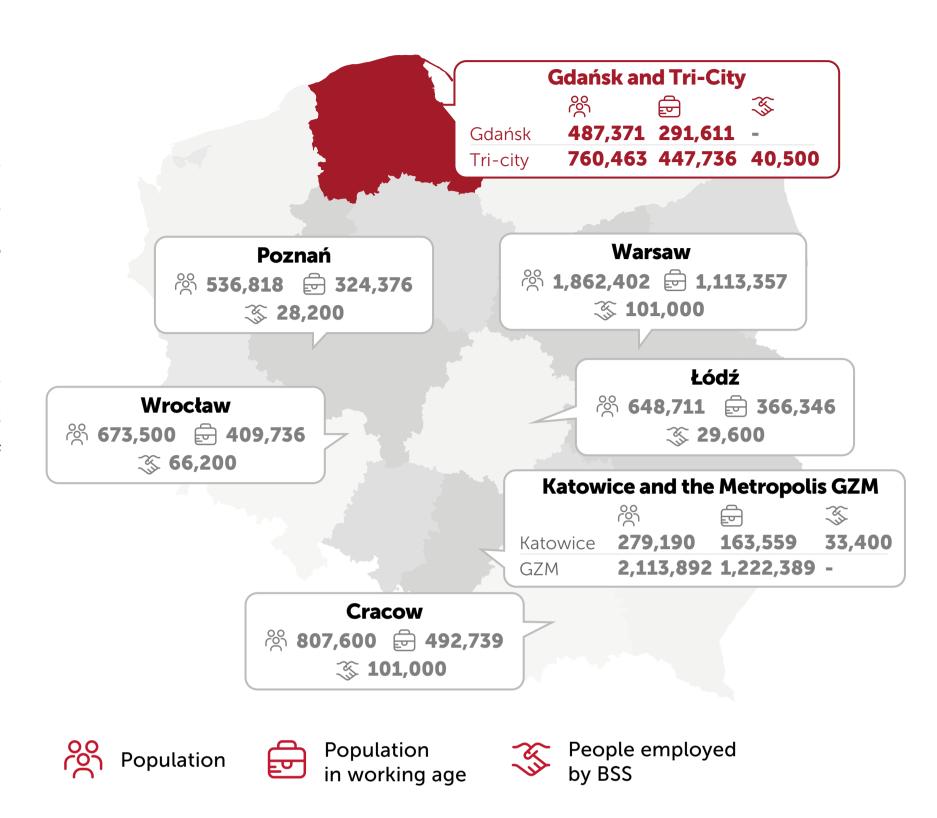


## **Tri-City**

Over the past few years, Tri-City has become one of the most attractive regions in Poland for investors in the shared services sector. This success is due to several important factors making the city attract international corporations and dynamically growing domestic businesses alike.

One of the region's key benefits lies in the access to qualified cadres. Tri-City headquarters prestigious universities such as Gdańsk Tech, Gdańsk University or the Polish Naval Academy, all of which provide the market with highly qualified graduates. Furthermore, the growing number of foreign students has greatly increased the availability of specialists fluent in foreign languages.

Another aspect greatly valued by investors is the highly developed transportation and office infrastructure. The dynamic growth of A-class office spaces creates perfect conditions for new investments. Furthermore, the proximity of Gdańsk's airport and well-developed road, railway and maritime infrastructure supports making business relations on a both national and international scale.



Having said that, the quality of life and the region's overall attractiveness are just as important. Tri-City not only offers opportunities for professional growth but also provides a high living standard, with easy access to recreational grounds, a rich cultural offer and a favorable investment climate. These factors are attracting both investors and young specialists seeking work-life balance.

Tri-City's SSC/BPO sector can be largely categorized into three main industries:

It is undoubtedly the driving force behind Tri-City's SSC market. In the past few months, we have seen the development of advanced technological centers, which are not only handling operational support but also developing software, artificial intelligence or data analysis. The greatest demand in this area concerns cybersecurity specialists, data analysts (Data Scientists, Big Data Analysts), cloud administrators (Azure, AWS) and programmers (Java, Python, C++). It bears mentioning that the SSC sector increasingly often requires advanced process automation, increasing the demand for specialist programmers and analysts. However, the global competition over talent remains a challenge – Polish IT specialists are often choosing remote work for foreign businesses able to offer higher salaries.



#### **Business services 2025**

Tri-City's finance sector is attracting investors due to legal stability and access to accounting, finance and tax specialists. Over the past few years, we have observed the demand to largely focus on such positions as independent accountants, financial controllers, financial analysts, reporting specialists or AP/AR specialists. The growing investor requirements for technical skills (such as operating ERP systems), advanced data analysis or foreign language proficiency requirements – especially concerning German, French and Scandinavian languages – have been shrinking the pool of available candidates.

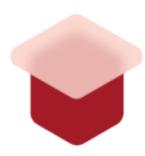
In the area of HR, we have seen a notable growth in demand for outsourcing HR services and administrative support. The most sought-after positions include payroll and short-term project recruitment specialists. The nationwide shortage of payroll specialists was also perceivable in the local market. When combined with growing expectations as to proficiency in English and systems such as SAP or Workday, it has greatly limited the pool of available candidates.

Tri-City has all the necessary advantages to maintain the continued development of the SSC sector. Key trends shaping this market arise from global technological changes, growing demand for advanced services and local factors. SSC businesses from the tech sector will be increasingly investing in automation and new technologies to boost their operational effectiveness and limit costs. The growing data analysis will become even more important and businesses will keep seeking Big Data and data analysis specialists. We also expect high demand for Robotic Process Automation (RPA), Cybersecurity and Artificial Intelligence (AI) experts.

Businesses will keep relocating more complex processes to Poland, going beyond the usual accounting functions to service global operations with high-added value. The growing importance of ESG (Environmental, Social, Governance) issues will necessitate creating roles related to reporting sustainable growth. A notable trend of growing personalization of services will likely highlight the shortage of employees fluent in German, French or Scandinavian languages, as well as increasing demand for more unusual languages such as Spanish, Italian or Portuguese along with the business expansion to South American markets of serviced companies.

Tri-City is a great choice for investors seeking a stable environment to develop shared services centers. Combining the well-developed infrastructure, access to talent and high quality of life all make Tri-City one of the leaders of Poland's SSC sector.



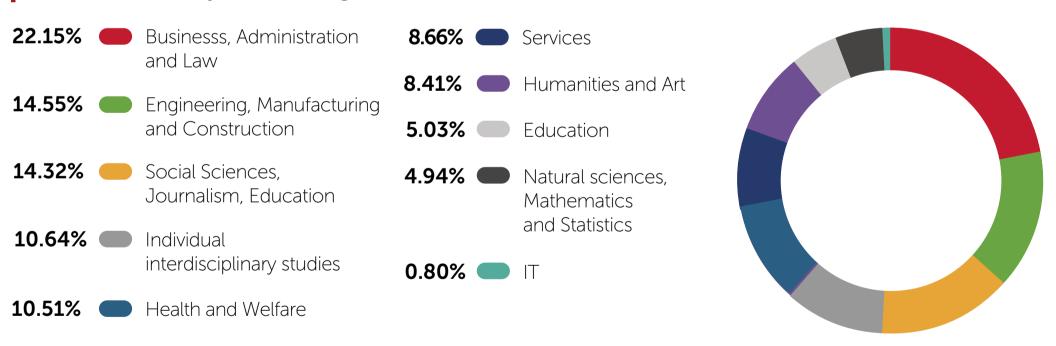


## Higher education

Over 22% of Tri-City's students have chosen a faculty related to business, law or administration. Faculties related to technology, industry and construction are also proving popular, having been chosen by 14.5% of students.

The 2023/24 academic year saw almost 79,000 people study in Tri-City's many universities, marking a 1.5% increase since the previous year. This confirms Tri-City's importance as Northern Poland's major academic hub. Each year, over 18,000 people graduate its universities to join both local and national job markets.

#### Fields of study according to ISCED-F 2014











## Tri-City — the gateway to Europe

Tri-City is constantly consolidating its position as one of the most dynamic investment and business hubs in Northern Europe. It's unique advantages – ranging from the strategic location to high quality of infrastructure and talented personnel cause – make it into not only a popular direction for relocation, but also a great investment destination. The region is attracting international corporations and innovative start-ups alike. 2025 is looking like a period of further economic growth and development thanks to new investments and expanding operations of pre-existing businesses.

#### An attractive place to live and work in

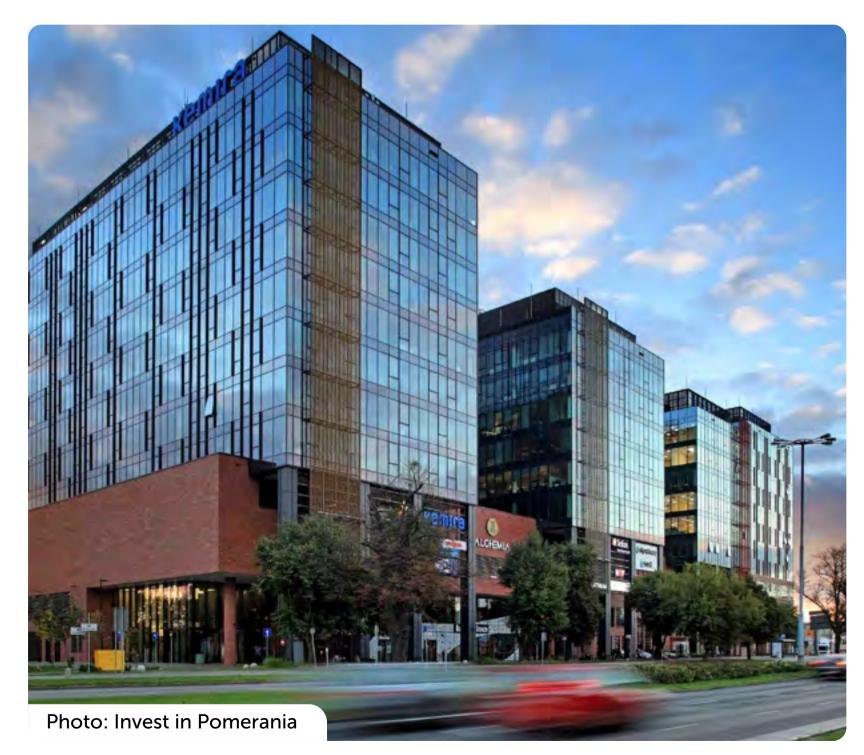
Tri-City is among the most attractive relocation destinations in Poland, combining a high quality of life with a dynamically growing labor market. The agglomeration, forming a unique urban structure on a national scale allows for easily achieving the work-life balance thanks to its proximity to the sea, numerous green areas and well-developed infrastructure. Residents can enjoy access to modern services, high-quality education and a broad cultural offer, while also enjoying numerous professional opportunities in one of the most dynamically growing economic areas in Northern Europe. Tri-City is a perfect place for anyone seeking a balance between professional and private life, offering the ability to both participate in international industry events and enjoy the unparalleled comfort of everyday life.

### Marcin Grzegory

Deputy Director









# Northern Europe's investment and economic growth leader

The region keeps attracting investors from all over the world. One of the key events throughout 2024 was The South Korean giant SK Hynix, a leader in the semiconductor industry. This investment marks the next milestone in Tri-City's development as a key innovation and technology center in Northern Europe. The company is developing a modern research and development center in the region, set to influence the growth of not only the local economy but also all of Poland's tech sector.

Another important investment concerns the opening of a shared services center by Royal Greenland – one of the leading fish processors in Europe. The company appreciated Tri-City's ability to provide a stable and effective environment for business operations, including access to highly qualified personnel.

The decisions of European giants such as Hapag-Lloyd and Arla Foods to further expand their offices and infrastructure in Tri-City confirm that the region offers a unique environment for long-term operations and growth, both crucially important for further economic growth and the creation of new jobs.

New investors are noticing Tri-City's enormous potential and, through their activity, bolstering the city's position as a key location on the global investment map. On the other hand, businesses pre-existing on the local market have been dynamically growing, legitimizing Tri-City as a place that understands and fulfills the expectations of businesses.







#### The center of networking and trade events

Parallel to the region's ever-growing importance in terms of investment, Ti-City is also becoming a dynamic knowledge exchange and business community integration hub. In 2024, it hosted numerous trade events promoting the growth of the BSS/IT sector, such as Follow the Leaders, Infoshare, IT Manager of Tomorrow or Scandinavian IT Night. They form an excellent opportunity to meet the leaders of IT, BSS and new technologies.

The region also hosts numerous networking meetings. Initiatives such as IT Club, Providers Meeting and Executive Club organized by Invest in Pomerania are a platform for effectively exchanging experiences and building contact networks among managers, leaders and company owners. It is them who put Tri-City on the map of Northern Europe's most important cities in terms of BSS and IT sector growth, as well as international cooperation.







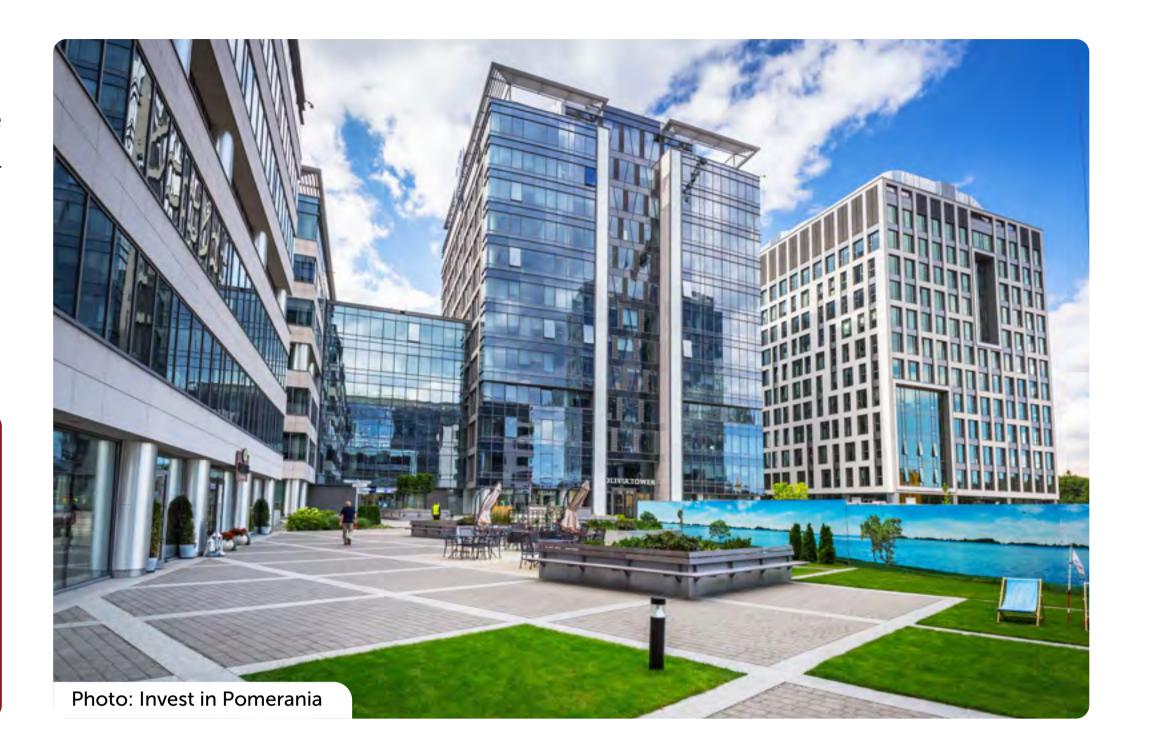
#### Tri-City on the path to further development

2025 seems set to become the next step in Tri-City's intense development. The growing scale of trade events such as Infoshare or IT Manager of Tomorrow proves not only the international interest in the region, but also its importance as a European Business Hub.

Furthermore, 2025 operations of Invest in Pomerania will focus on extending the cooperation between BSS/IT sector and tech industries such as semiconductors, energy, mobility and renewables.



As a key location on Northern Europe's investment map, Tri-City has an exciting future ahead. Thanks to its excellent infrastructure, an attractive investment climate and a constant drive for innovation, the agglomeration has found a path toward further growth, becoming one of Europe's most important economic centers.







**Business services 2025** 



### **Szymon Renk**

Senior Consultant, Gdańsk Region



# Office real estate market

2024 was very successful for Tri-City's office real estate market. Hot on the heels of record-breaking 2023, the demand has once again reached a very notable level – the second highest in history, which confirms the market's recovery following the pandemic.

Regrettably, the supply of new office space has decreased for yet another year in a row, reaching a 15-year low. Low supply combined with high demand and the falling vacancy rate have all led to a slight increase in the base rent. However, we did not observe a notable price correction, largely due to the strong negotiating position of the tenants.

Tri-City's market was dominated by a hybrid work model, leading tenants to expect flexible terms. They could be offered thanks to a broad offer of finished offices, supplementing the limited supply.

As of writing, the amount of space under construction is at a 10-year low. This leads to a high renegotiation rate in all rental agreements. Approximately half of all organizations are choosing to stay in their current location, but following a brief hiatus, we have observed a return to signing agreements while new buildings are still under construction, providing an optimistic outlook for the future.





#### Katowice and Metropolis GZM

# Katowice and Metropolis GZM



Population\* 30.06.2024 r.

2,113,892 GZM279,190 Katowice



People employed by BSS\*\*\*
ABSL 2024 r.

33,400



Unemployment\*\*
January 2025

1.1%



Apartments delivered to the market\*\*

January 2025

**324** 



Population in working age\* BDL 2023 r.

**1,222,389** GZM **163,559** Katowice



Number of BSS centers\*\*\*

ABSL 2024 r.

140



Average gross salary\*\*

Average monthly gross salary in the enterprise sector in January 2025 r.

PLN 9,323.83



<sup>\*\*</sup> https://statystykamiast.stat.gov.pl/





<sup>\*\*\*</sup> Source: "Sektor nowoczesnych usług biznesowych w Polsce 2024" report by ABSL



## Natalia Nijak

Division Manager



## **Katowice i GZM**

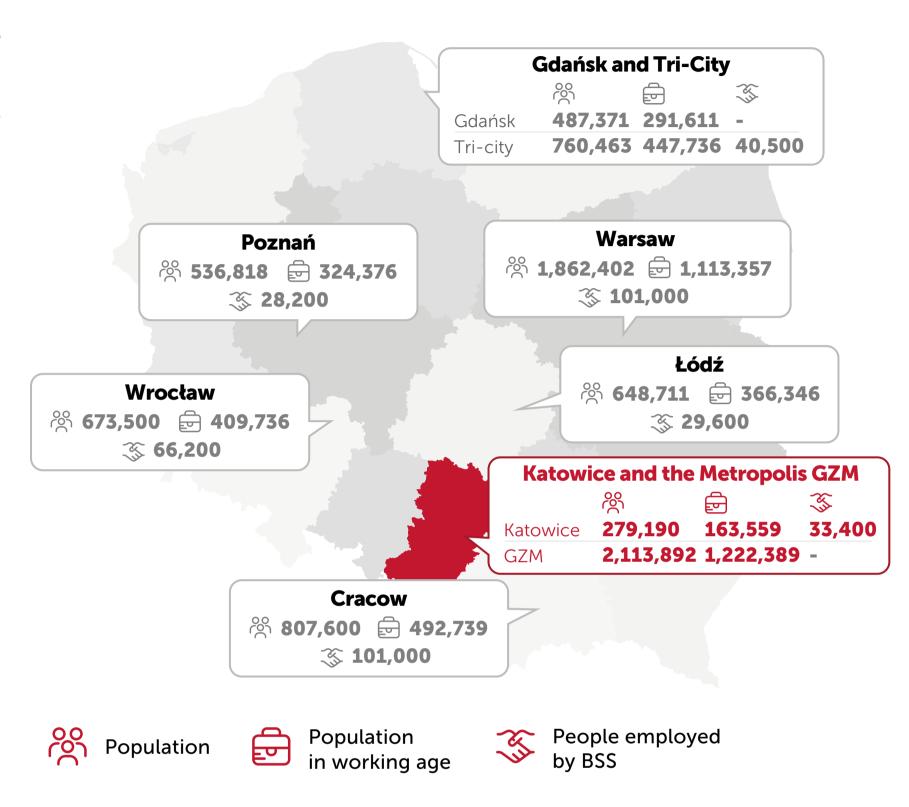
Katowice and Metropolis GZM not only form the beating heart of Polish industry but are also a very well-developed region in business, technological and cultural terms. This versatility is a major source of Upper Silesia's strength and uniqueness, including its attractiveness as an investor-friendly destination.

The region's potential has been noticed by investors from the modern business services sector, who employ over 33,000 people here.

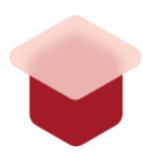
The Polish business services market – stable and mature – has been transforming over the past few years, moving toward greater technological advancement and specialization of processes. This is due to several factors, the most important of which is cost optimization. Despite the growing costs of running a business, Poland remains an attractive investment destination.

However, investors are now making decisions with great deliberation, increasingly often focusing on highly specialized positions covered by qualified workers able to match Western specialists.

The modern business services sector, long associated with the dynamic changes revolutionizing the market, is now losing pace. One could say that the times of Poland being the main destination for relocating simple, repeatable operations are now over. Investment structures within the sector are shifting toward competence centers. With that in mind, access to experienced specialists and educated staff is proving particularly important. Upper Silesia, with over two million residents and a strong academic infrastructure, is ready to respond to these needs, offering the investors a stable environment facilitating growth.







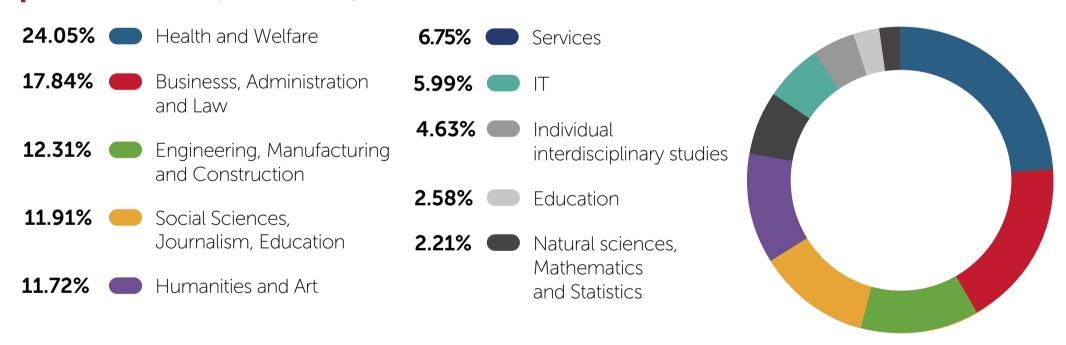
## Higher education

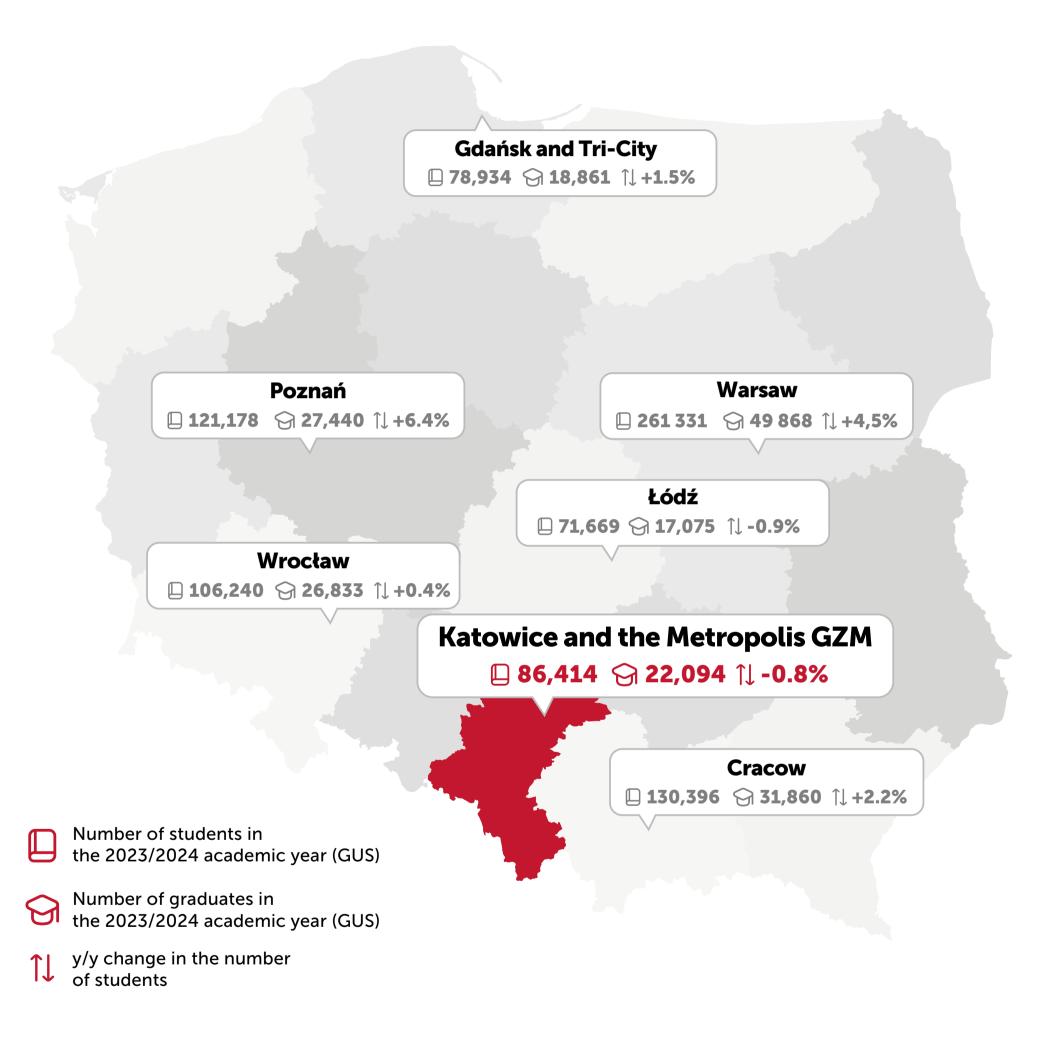
In Katowice and Metropolis GZM, the most popular faculties concern medicine and social care. They attracted over 24% of students, marking an increase over the previous year.

Business, Law and Administration-related studies are also attracting much interest, having been chosen by 17.58% of all students.

Despite the number of students in the region reaching over 86,000 in the 2022/23 academic year, it marked a slight decrease – by 0.8% – in the number of both students and graduates.

#### Fields of study according to ISCED-F 2014









### dr Magdalena Kolka

Deputy Manager, Investor Services Department Katowice City Hall



# The city ahead of the future: Katowice.

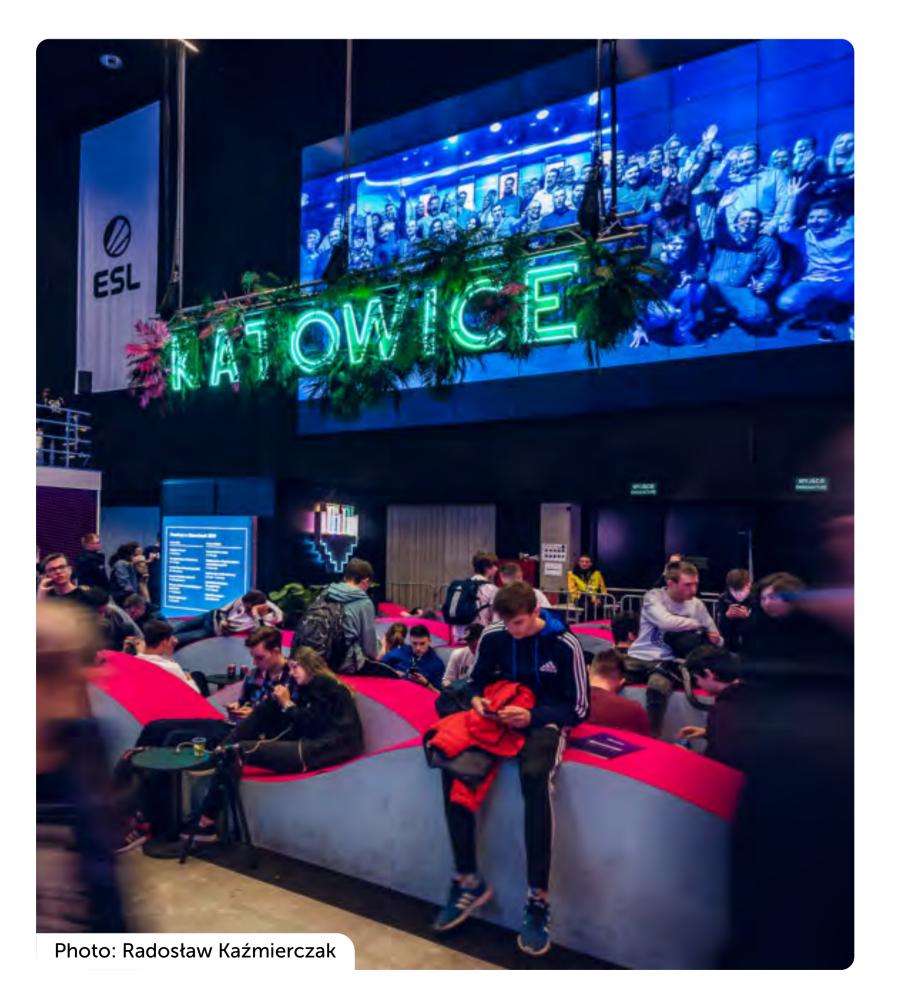
Thanks to the high quality of work and excellent specialists, the Polish market keeps attracting investors despite the changing costs of employment. 2025 is set to bring changes to the approach to investment – instead of focusing on spectacular endeavors with high volumes of recruitment, entrepreneurs will turn to adapting their teams to the dynamically changing environment. Katowice's example shows that we're set to face smaller, but more technologically advanced investments- the city is prepared for them in both substantive and organizational terms.

# Trends in the shared business services sector

In the coming months, process migrations, technological development and implementation of modern operational models will be setting the direction for the development of the BSS industry. The investors are focusing on technological innovation, developing competencies, as well as upskilling and reskilling programs helping employees adjust to new market requirements.

The times of seeking locations for large operational centers employing thousands of employees are now over. In Katowice and Poland at large, we can observe a turn toward highly specialized services of visibly increased value. This process is related to the investors' focus on qualitative factors – productivity, automation and innovation, including the use of AI in more advanced processes. The investors will seek greater effectiveness with

2025 will be a time for implementing innovative strategies and bold, flexible operations bolstering the position of Poland's market as an attractive investment destination in Europe.





#### Knowledge-based technologies and services

New investments in Katowice's market are much smaller in terms of the number of jobs created, but are more technologically advanced, requiring high competencies. Knowledge-based services are among the fastest-growing sectors within the metropolitan area (source: KIBS, Knowledge Intensive Business Services). They provide operational support for advanced business processes. Such a profile of operations determines the employment structure – scientists, engineers, experts and specialists are in the highest demand.



The market needs employees capable of managing more complex operations, opening new opportunities for our agglomeration. We're an attractive destination for new investments, as we have the potential to provide the most advanced of services to global enterprises. We are familiar with the ongoing economic changes and can handle them — largely thanks to our experience with earlier transformations.

Katowice are bolstering their position as a leader of Poland's technological transformation, responding to the changing needs of modern businesses. The Katowice Gaming and Technology Hub is the beating heart of our operations, forming the core of the upcoming New Technology District. This innovative cooperation platform links local and global tech companies, start-ups and the education sector, creating a space to facilitate growth and synergy. The hub rests on four key pillars: Gaming/E-sport, Al Knowledge Exchange, Digital Bridge and Network Acceleration. Thanks to this initiative, Katowice will not only become a more attractive destination for investors and entrepreneurs but also a place for achieving one's professional ambitions, able to offer a high quality of life. We believe that the strategic direction we adopted will further increase the competitiveness of Katowice and the surrounding region, bolstering the city's position as a dynamic center of innovation and cutting-edge technology.







#### A city of specialists

Katowice are the beating heart of a two-milion-strong metropolis with an excellent infrastructure, making it a dream destination for international investors. The 19 local universities are attended by over 90,000 students, with almost 23,000 graduates each year. The Silesian University, Economic University, Silesian University of Technology and many other prestigious regional universities are providing well-prepared specialists who reflect the needs of the modern labor market. This allowed the city to remain among the most business services-oriented regions for the past several years – the sector now employs over 33,000 people. We're involved in broadening knowledge, supporting community growth and offering an inspiring workspace for both living and education.



#### Comprehensive investor support

Our long-term strategy of attracting and supporting investors is a result of balancing push (reaching potential investors and creating their needs) and pull (fulfilling the needs of businesses that already have investment plans) factors. The city, conscious of the various needs and expectations has founded an Investor Support Department – a team equipped with specialized knowledge, able to provide businesses with detailed information on local incentives and opportunities, while also preparing them for a "soft landing" on the local market. Due to the greatly varied investor needs, the department has founded three separate teams, each focusing on a different key element: the business services sector, small and medium-sized enterprises (including start-ups) and facility investments.

Katowice are implementing a local development strategy through strengthening regional ties (cooperation on a metropolitan level), cooperation on a regional and national scale – with KSSE and PAIH, respectively) as well as working with the central government through the Investor Tax Support Center under the Ministry of Finance and promoting education (middle, vocational and higher education).



The Investor Support Department aims to make investors feel comfortable in a new location, support them in all matters and – importantly – for a lifetime. We help out businesses at all stages of growth, from long-term partners to our "youngest" investors such as BPiON, Hatch, L3Harris Technologies, Morgan Advanced Materials, Outokumpu or Danone. We fully believe that each of them is growing more confident that investing in Katowice was the best choice they could've made.

Investors are aware they can always count on us. It's no coincidence that in 2024 we were awarded 7th place in the "Top 10 Large European Cities of the Future 2024 – fDi Strategy" ranking of fDi Intelligence, part of the Financial Times group, thanks to our strategy of attracting direct foreign investments.





### Tomasz Chojnacki

Director, Silesia Region



# Office real estate market

2024 has brought a stabilization for Katowice's office market, following a fairly difficult period marred by the effects of the pandemic and adapting to remote and hybrid work models. As businesses slowly return to stationary work modes, we observe increased interest in offices, which are becoming not only a place of performing work, but also a space supporting creativity and integration. In response to the changing needs of employees, many businesses are rediscovering the value of an office in attracting talent. Office spaces are being rearranged with comfort and flexibility in mind, becoming more open and featuring dedicated zones for cooperation and relaxation.

Despite the number of new organizations in Katowice's market slightly increasing, businesses are acting much more cautiously than in previous years. They are locating their first offices primarily in serviced spaces, which are considered increasingly attractive among potential tenants due to their flexibility. The issue of sustainable growth is still of much importance and increasingly often forms a key consideration when choosing office space.

Throughout 2024, not a lot of new office space was put to market in Katowice. Difficulties in financing new endeavors and selling commercialized facilities cause the supply of new office space to remain fairly low. This situation is an opportunity for pre-existing buildings, which might become an interesting alternative for potential tenants, following some modernization and freshening up.

Returns to offices and their rearrangement, growing supply of serviced offices, caution of new investors and the importance of sustainable growth are all trends expected to continue throughout 2025. Due to a high vacancy rate, tenants in Katowice may expect an advantageous negotiating position and thus also receive good rental terms and improve the standards of work.





Łódź





Population\* 30.06.2024 r.

648,711



People employed by BSS\*\*\*
ABSL 2024 r.

29,600



Unemployment\*\* styczeń 2025

4.7%



Apartments delivered to the market\*\*

January 2025

408



Population in working age\* BDL 2023 r.

366,346



Number of BSS centers\*\*\*
ABSL 2024 r.

120



Average gross salary\*\*

Average monthly gross salary in the enterprise sector in January 2025 r.

PLN 8,526.29



<sup>\*\*</sup> https://statystykamiast.stat.gov.pl/





<sup>\*\*\*</sup> Source: "Sektor nowoczesnych usług biznesowych w Polsce 2024" report by ABSL



#### Agnieszka Dublańska

Team Leader



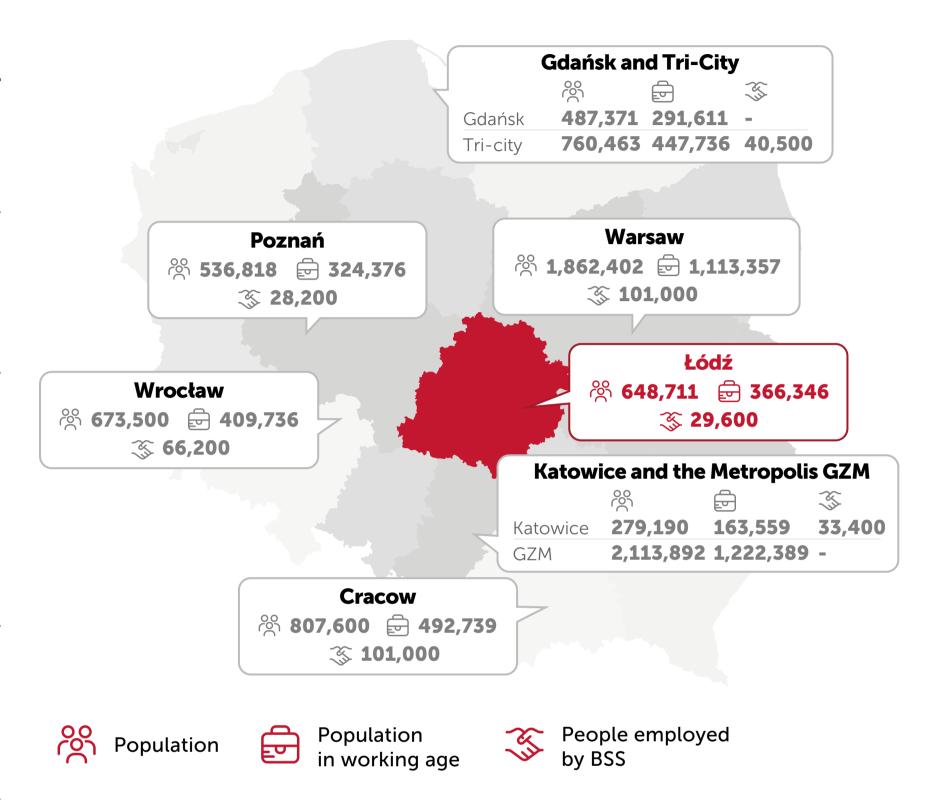
## Łódź

We have observed several new BPO/SSC investments in the Łódź province. The trend of small-sized new openings remains at a similar level since the previous year.

I believe the causes lie largely in global and local changes: the appearance of new competitors in the form of countries such as Bulgaria, Romania or Central African states, growing salaries of industry specialists or Central-Eastern Europe's newfound reputation as an unstable region due to the ongoing war in Ukraine. However, we are now looking toward the future with optimism, expecting the situation to gradually change, as the number of investor inquiries in Łódź has increased, particularly in the last quarter.

Insourcing, that is developing and expanding pre-existing SSCs has been a characteristic trend in 2024. A number of notable players have expanded their operations in Łódź by relocating new processes from other European countries or moving to larger and more prestigious offices. Unlike SSCs, BPO centers did not expand quite as notably, having noted no major changes.

Despite somewhat difficult market circumstances, Łódź can boast an increasingly positive investment potential through such initiatives as the Central Communication Port (CPK) and the construction of the cross-city



tunnel. It also bears mentioning the city's improved PR and growing recognizability. By the end of 2024, The Independent placed Łódź – as the only Polish city – on its list of favorite cities worldwide. Numerous events such as Łódź Summer Festival and Light Move Festival as well as attractive places such as Orientarium or Manufaktura are attracting an increasing number of tourists and enticing to relocate workers here.





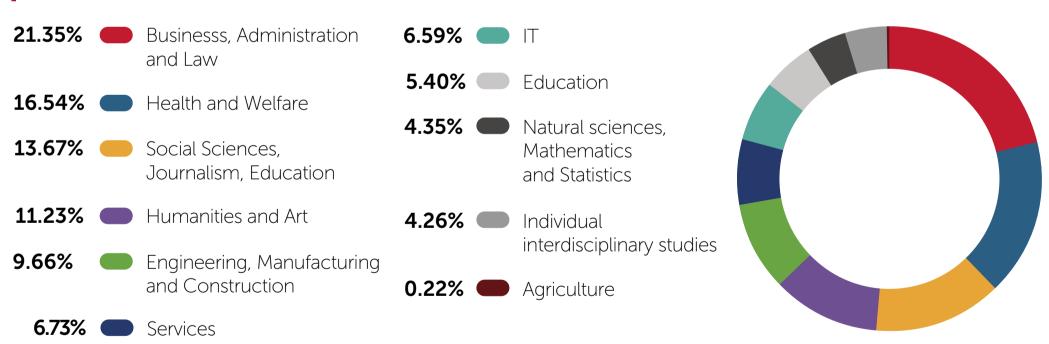
## Higher education

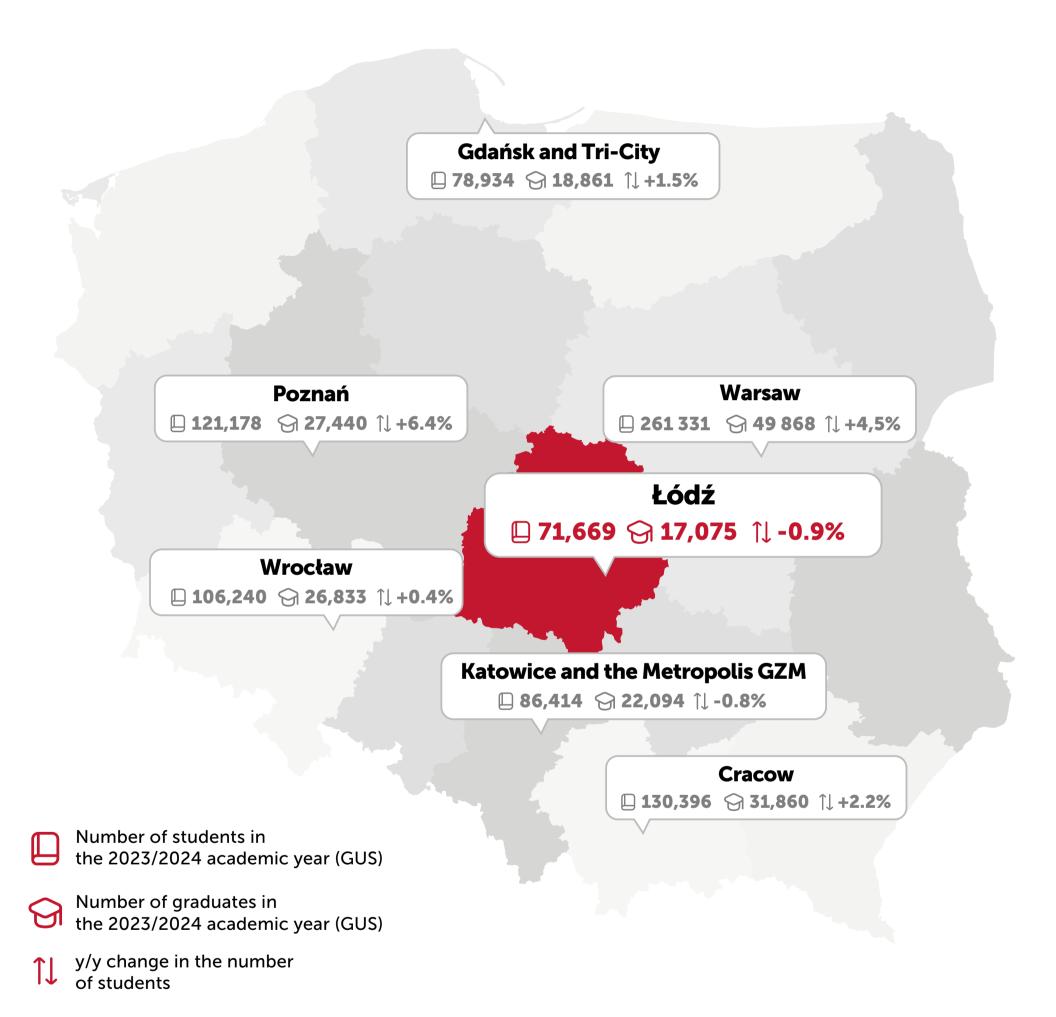
Łódź attracts students interested in business, administration and law – with over 21% choosing such faculties.

Medicine and social care-related studies are also proving quite popular, accounting for 16.5% of students.

The number of students in Łódź in the 2023/24 academic year amounted to approximately 71,700 people. Compared to the previous year, this marked a slight decrease of 0.9%. Despite this, approx. 17,000 people graduate each year in Łódź.

#### Fields of study according to ISCED-F 2014









# Łódź – the city of opportunities and dynamic growth

Łódź, one of Poland's largest cities, has been undergoing a major transformation from an industrial textile center into a modern city focused on services, technology and culture. It is the national leader in four business sectors: Biotech/Healthcare, Hi-Tech/IT, Advanced Manufacturing/R&D and BPO/SSC. International businesses are investing in Łódź, utilizing its strategic location, competitive operational costs, access to a (broadly understood) talent pool and modern business infrastructure.

#### Strategic location and infrastructure

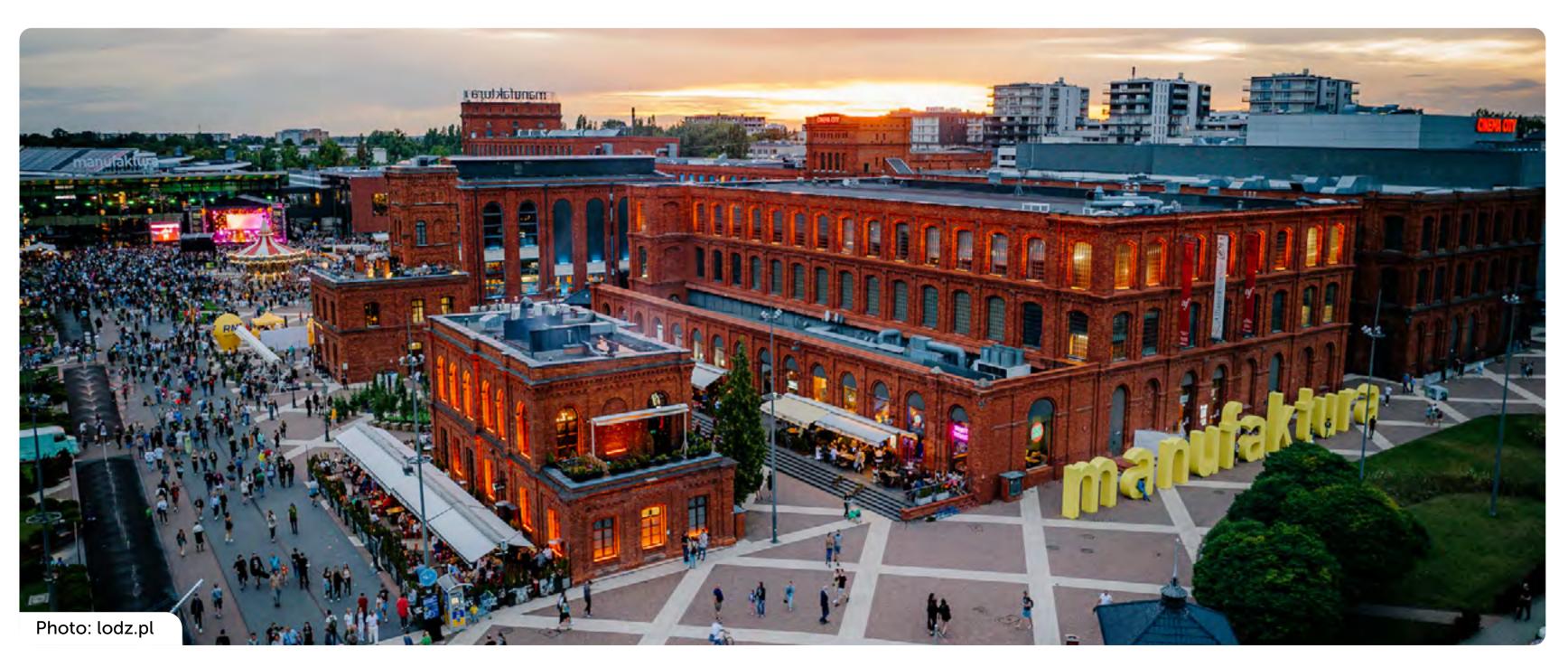
Thanks to its central location and closeness to the capital, Łódź has become a logistical hub and an investment magnet for the warehouse real estate sector. Opening the S14 route has made Łódź the first Polish city with a full highway ring, a very attractive feature for the logistics industry.

Łódź is making large investments in infrastructure, sustainable transport and future technologies such as green energy or intelligent urban solutions. An example of that is the recent implementation of a cross-town tunnel, allowing underground transportation and alleviating downtown traffic.

#### **Adam Pustelnik**

First Deputy President, City of Łódź







#### The BSS sector and labor market

Łódź is also dynamically growing in the area of BSS, which is of interest to the investors.



The city has over 120 active BPO/SSC/IT centers employing approx. 70 thousand people. In the past few years, we have seen 12 new business centers open in Łódź and many pre-existing businesses reinvesting to bolster their presence in the region. The investment and reinvestment growth rates are related to the growing specialization of business processes in the service centers and thus also increased demand for highly qualified workers.

#### Working with universities and human capital

Łódź is an important academic hub, hosting 19 universities. Access to a wide pool of graduates greatly eases the recruitment and development of local businesses. Working with the academia forms a foundation for the future of Łódź. Educating highly qualified cadres, aligned with the needs of a modern job market, is a key element of the city's ongoing transformation.







#### **Investor support**

The Łódź City Hall offers strategic partnerships to entrepreneurs through the Invest in Lodz intermediary. It guarantees comprehensive support in development and reaching business goals. Invest in Lodz offers full pre- and post-investment support, including strategic advisory and administrative support, as well as helping select a favorable location for a given business. Invest in Lodz supports investors in making contacts with the local universities, R&D centers and technology clusters. Its operations encompass organizing regular business events providing opportunities to get in touch with industry leaders, representatives of local authorities and financial institutions. Participation allows entrepreneurs to increase brand visibility, exchange experiences and discover new opportunities for cooperation.

Invest in Lodz also implements the "Młodzi w Łodzi" (Youth in Łódź)program, which helps align the city's academic potential with the needs of the business world by offering investors access to talents and innovation while building a positive brand and competitive advantage. As an educational and technological center, Łódź also supports businesses through unique tools such as the Startups Powered by Invest in Lodz booster program – the largest technological sandbox and stipend program in Poland.

The city also operates the – one of the key business partners for entrepreneurs. As an innovative investment platform, LSSE can offer support at every stage of business process implementation, adjusting to the varied needs of businesses from different sectors. Aside from individual investment advisory, it allows for the utilization of attractive tax breaks under the Polish Investment Zone (PSI).





#### Investments and development

Łódź is transforming into a vibrant investment hub in front of our very eyes. The city is banking on investments in sectors such as technology, innovation and services sectors, both helping find business partners and also leading to notable employment growth.

A notable impulse behind the city's development is the ongoing largest infrastructural investment in this part of Europe – the Central Communication Port (CPK). CPK will create even greater opportunities for our global partnerships. The international airport hub (both passenger and cargo) paired with an express railway network link Łódź with other major cities in Poland and other parts of the world, attracting new investors, creating new jobs and strengthening the city's position as a major hub in the world of international logistics.

### Quality of life and attractiveness for employees

Łódź also stands for a high quality of life. Affordable real estate prices, rich cultural offers and closeness to nature all make it a great place to live in. Attractive rental prices attract students and young professionals and the large number of events, festivals and other activities bring in numerous tourists.

In 2024, Łódź was visited by over 4.7 million people. Approximately half a million people participated in the three-day long Łódź Summer Festival. Many music aficionados from across the world came to Łódź for the Audioriver and Parada Wolności festivals. Light Move Festival – the city's signature event for several years - proved another major draw. The visitors are eager to visit the Fala Aquapark (1.5 mln people), Orientarium ZOO Łódź (1 mln), Atlas Arena stadium (800 thousand) and the EC1 Łódź. By the end of 2024, The Independent magazine put Łódź on the list of must-see cities across the globe.





enterprises and well-developed infrastructure. From a long-term perspective, Łódź is among the most prospective cities in Poland for placing capital. Investing here is a chance to participate in the city's dynamic transformation and utilize its enormous possibilities.



**Business services 2025** 



### **Anna Trębicka**

Director, Łódz Region



# Office real estate market

Despite many challenges, H2 2024 saw the office market in Łódź recover, paving the way for several positive trends. Over the past few years, the local market has had large amounts of modern office space available: a number of large investments that had begun before the pandemic were finally put to market. While in Q2 2024 the vacancy rate has reached a fairly high level of 23%, caused by factors such as redefining the work model toward hybrid work, ever since Q3 2024 we have been seeing a slight decrease.

In 2024, businesses acted more deliberately when it came to decisions to reduce office spaces. When analyzing completed transactions and the current assets of businesses present in Łódź (excepting the new demand), we have seen an increase in occupied office space for the first time since the pandemic, at 4.5%. This is a very positive signal for the market.

The quickly developing city of Łódź forms a very interesting direction for many international businesses. This is reflected in the high quality of new office investments, which fulfill even the highest technical standards and requirements. As of writing, 60% of all office resources in Łódź comprise A-class buildings. Due to ESG standards and legislative requirements, there is a growing demand for modern, certified office space which in turn entices tenants of B-class buildings to relocate to A-class offices.

The demand for office space is caused largely by contract renegotiations over the past 5-10 years – their cyclical nature generates a fairly stable demand for office space. The dynamics of annual change in demand are stabilizing at a rate we expect to plateau at 3-4%. The overall annual demand exceeded pre-pandemic values in 2024 and in the coming years we also expect a slight increase in both base and effective rent.





#### Poznań



Population\* 30.06.2024 r.

536,818



People employed by BSS\*\*\*
ABSL 2024 r.

28,200



Unemployment\*\*
January 2025

1.1%



Apartments delivered to the market\*\*

January 2025

**472** 



Population in working age\* BDL 2023 r.

324,376



Number of BSS centers\*\*\*

ABSL 2024 r.

**152** 



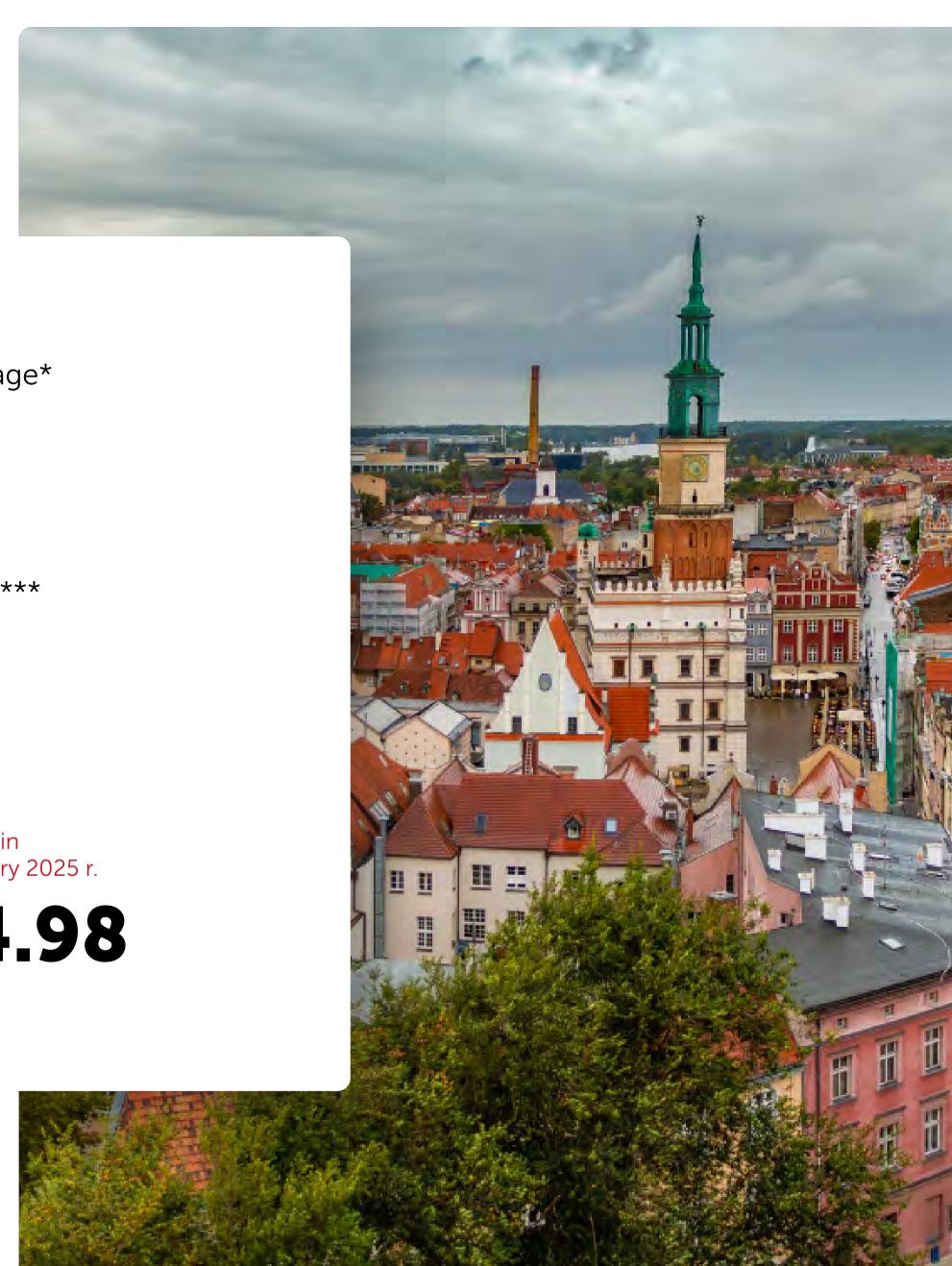
Average gross salary\*\*

Average monthly gross salary in the enterprise sector in January 2025 r.

PLN 9,284.98



<sup>\*\*</sup> https://statystykamiast.stat.gov.pl/





<sup>\*\*\*</sup> Source: "Sektor nowoczesnych usług biznesowych w Polsce 2024" report by ABSL



#### **Michał Piernik**

Division & Business
Development Manager



## Poznań

Last year saw SSC/BPO businesses in Poznań and Greater Poland become more cautious toward new recruitment projects, as compared to earlier years. Despite this, the sector has increased the overall employment, reaching a level of approx. 30,000 workers employed in over 150 centers.

This was made possible thanks to the new investments, which over the past two years have led to increased employment in modern business services centers and, by further developing pre-existing units, relocation of many advanced processes to Poznań, making the market offer much more attractive. Poznań is one of the most stable regions for Poland's shared services industry. This is largely thanks to already established brands, which kept growing in the past year, expanding their structures. Much points toward this trend continuing throughout 2025.

Poznań's SSC/BPO sector remains a highly attractive workplace. However, one should bear in mind that the economic downturn has caused salary growth to stall, compared to previous years. In the near future, we expect the industry to raise salaries by approx. 5-15%.

In Greater Poland, the most sought-after positions concern general accounting, controlling, procurement, business management and data management specialists. We have also noticed increased interest in new positions related to ESG. The AI, despite not increasing recruitment demand

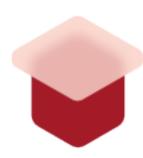
**Gdańsk and Tri-City** 487,371 291,611 760,463 447,736 40,500 **Warsaw** Poznań **№ 1,862,402 1,113,357 %** 536,818 **€** 324,376 **\$ 101,000 3** 28,200 Łódź **%** 648,711 **€** 366,346 Wrocław **№ 673,500 ⊕ 409,736 3** 29,600 **35** 66,200 **Katowice and the Metropolis GZM** 279,190 163,559 33,400 2,113,892 1,222,389 -Cracow **№ 807,600 ⊕ 492,739 %** 101,000 Population in working age People employed by BSS Population

just yet, will play a key role in the transformations taking place in the SSC sector. The demand for foreign languages is dominated by German, although the gap between it and the remaining languages has largely eroded.

The most popular work mode in the modern business services industry is still the hybrid model, usually focusing on 2-3 office days a week. Businesses choosing fully stationary or fully remote work form a small minority.

Over the past year, one could notice a growing number of global positions in Poznań, increasing the city's prestige in the international arena, proving the sector's maturity. Knowledge-intensive processes are no longer the domain of Poznań, but also Poland at large. The country is aiming to become a leader in modern business services, reaching "very high quality for a fairly good price". Poznań – a city always on top of the current trends – has time and time again proven to be worth knowing about. Its evolution comes with stability, which has proven crucial for businesses in such dynamic and uncertain times.





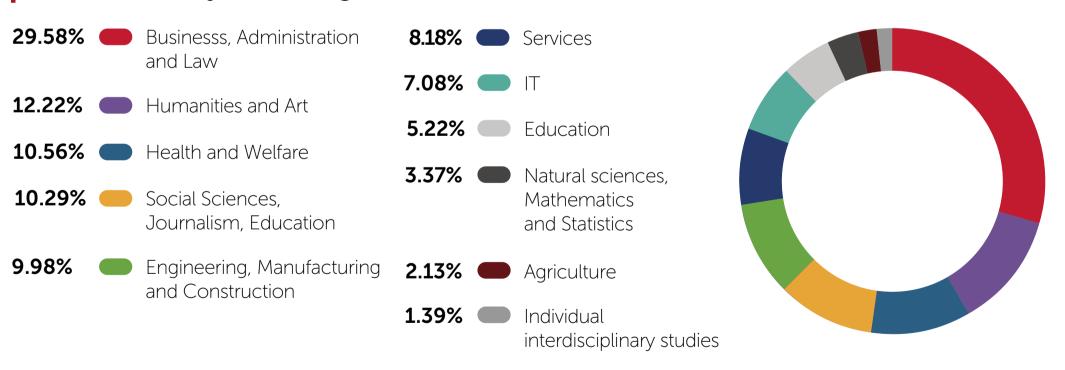
## Higher education

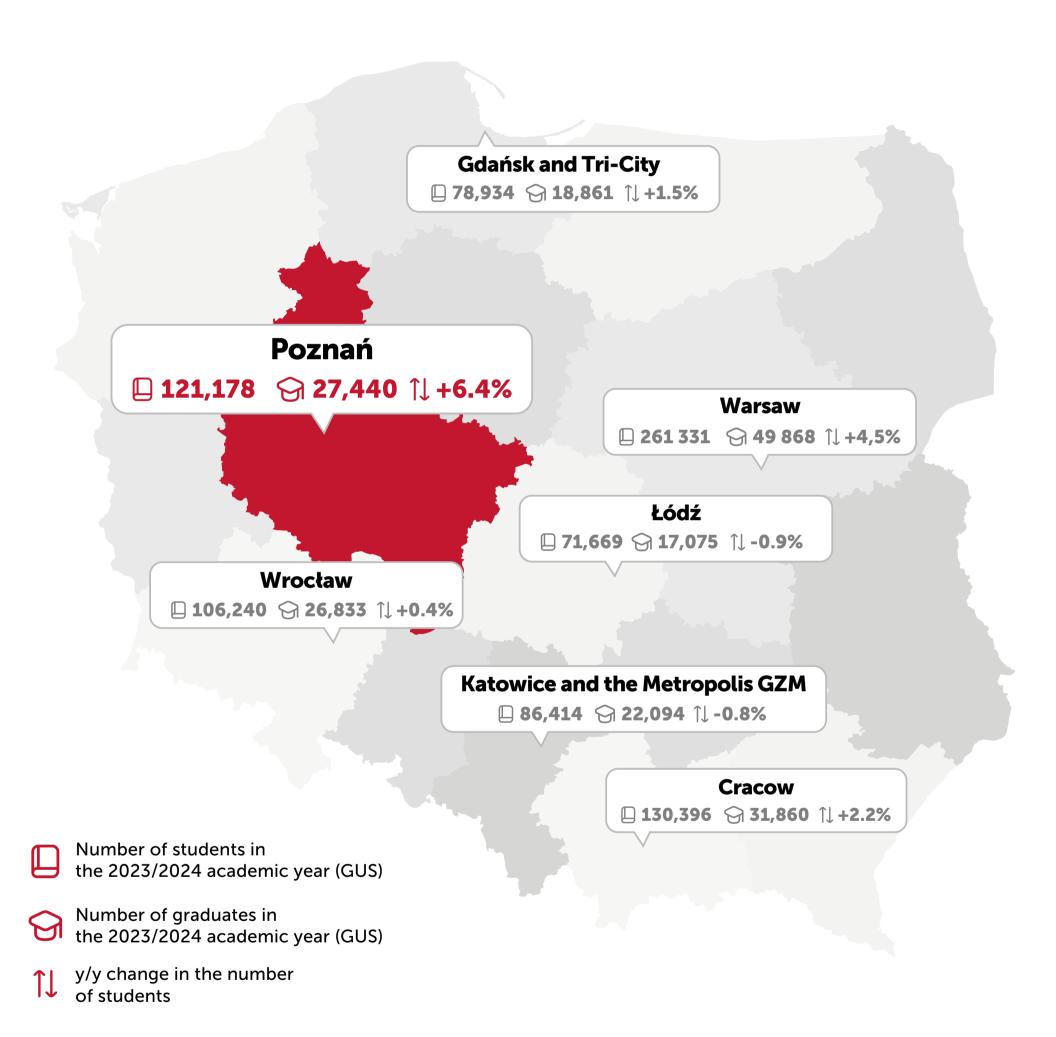
In the last academic year, Poznań-based universities saw the greatest rise in the number of students among the researched cities, at 6.4%. As of writing, over 121,000 people are studying here, of whom almost 30% chose a faculty related to business, administration or law.

The second most popular group is formed by humanities and arts, accounting for 12.22% of all students. Last year saw over 27,000 people graduate from Poznań's universities.

The city's universities offer a high-quality education in a place with far lower costs of living than Warsaw, Cracow or Gdańsk.

#### Fields of study according to ISCED-F 2014











### Jacek Jaśkowiak

President of Poznań



Katja Lożina

Director, Investor Services Bureau, Poznań City Hall



# Poznań - city of the future

Poznań is a city where the modern business services sector has been dynamically growing for almost two decades. The centers that operate here have begun with simple processes and now are servicing technologically advanced projects. The city is following the current trends, reflecting the modern needs of its residents and employers: it keeps growing, supporting innovation and remains open for future challenges.

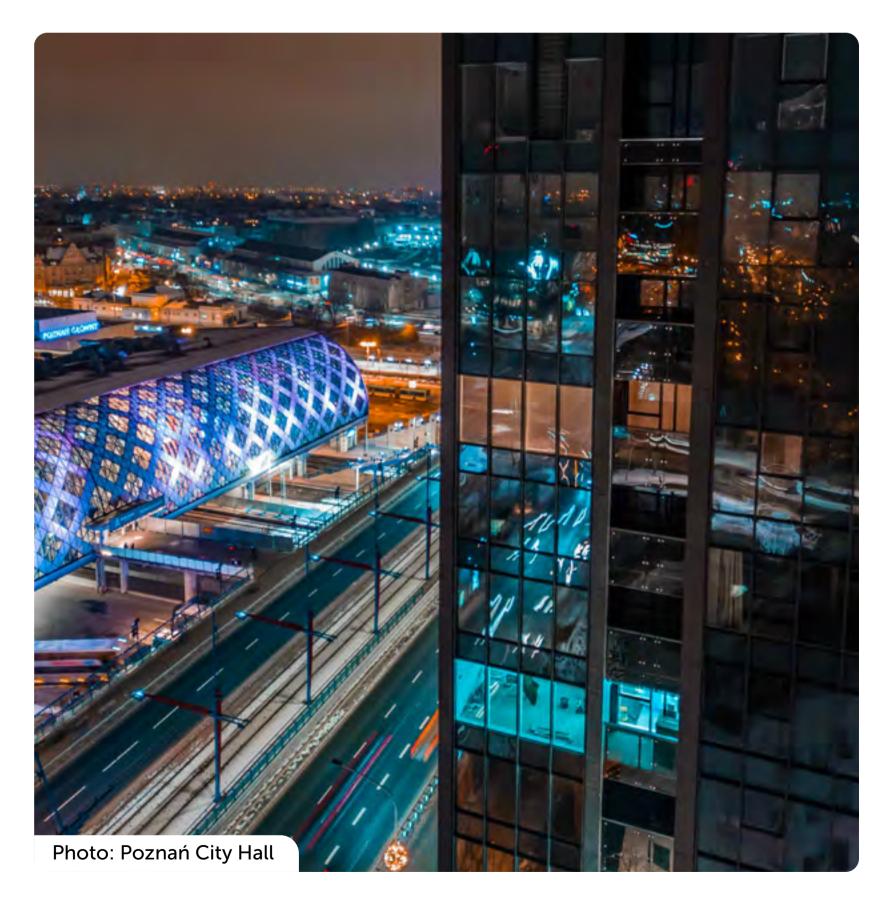
#### **Convenient location**

One of Poznań's major advantages is the city's location. Being positioned halfway between Warsaw and Berlin, it forms a major railway, road transportation and airport hub. The international Poznań-Ławica airport located within the city's borders is another key benefit, allowing direct flights to such cities as Warsaw, London, Munich, Amsterdam, Lisbon or Dubai.

# Educational potential and technological development

Poznań guarantees the ability to study at prestigious universities with high levels of internationalization and scientific potential, as well as great infrastructure for students who comprise a fifth of the city's population. 24 universities operate here, all adjusting their offer to the needs of businesses and students alike by introducing new faculties. For example, the Mathematics and Information Technology Faculty of Adam Mickiewicz University launched the Artificial Intelligence Center a couple of years ago.

On the other hand, Poznań's Supercomputing and Network Center created the IBM Quantum Innovation Center – the first of its kind in Central-Eastern Europe. It currently operates two quantum computers, with a third one being planned. This opens new, interesting possibilities for the development of quantum technologies for cybersecurity, medical or AI development purposes. By launching such innovative projects, Poznań provided businesses with access to high-quality experts. It also bears mentioning that the local universities offer the ability to study over 50 different foreign languages.





#### The city of business

For a long time, Poznań has enjoyed a reputation as a city of business. Brands such as Allegro, Żabka, PEKABEX Group, Enea Group or Beyond have originated here. The capital of Greater Poland province also attracts global enterprises such as Volkswagen, GSK, Franklin Templeton, Unilever, Bridgestone, Beiersdorf, Capgemini, Mars Wrigley, Softswiss, Sennheiser or Grace. Over 134,000 economic operators are active within the city and the number of businesses backed by foreign capital is among the highest in Poland.

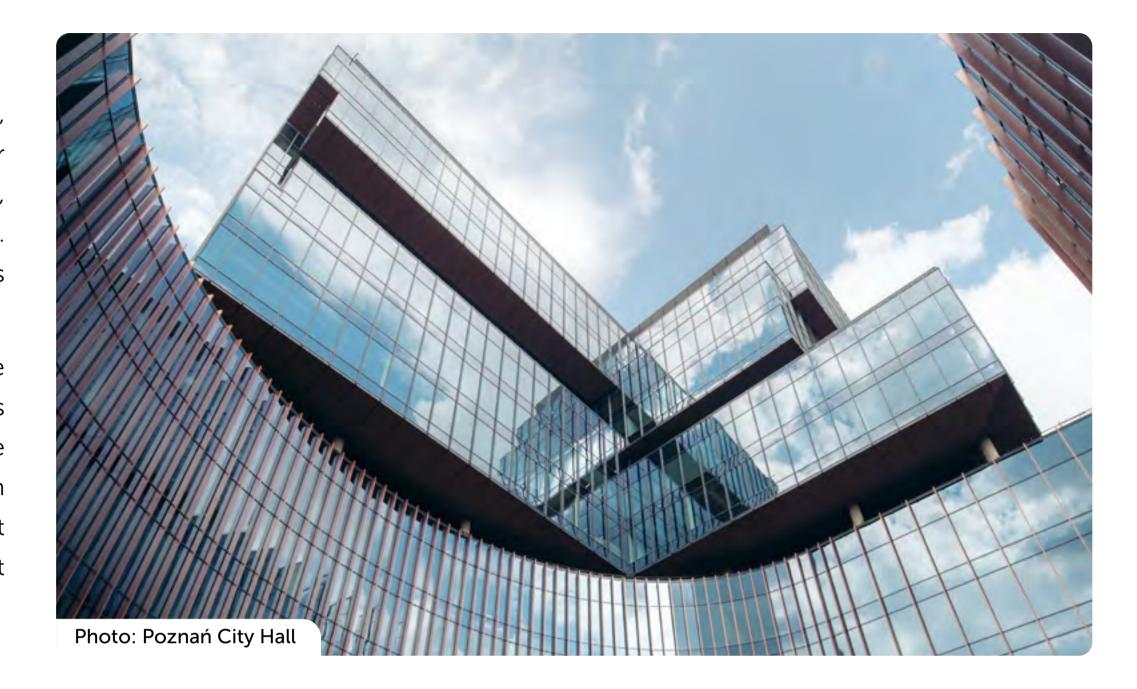
The modern business services sector, employing over 30,000 people, plays a major role in the city's economic growth. The industry's nature is highlighted by its international scale – Poznań's business centers utilize over 30 different languages. While last year's market changes have brought many challenges and sectors such as IT, SSC/BPO or R&D shifted from a dynamic growth toward stabilization and optimizing employment, adjusting to global trends, Poznań's market is nevertheless constantly evolving, retaining its position as a major hub for the development of this kind of services in Poland.

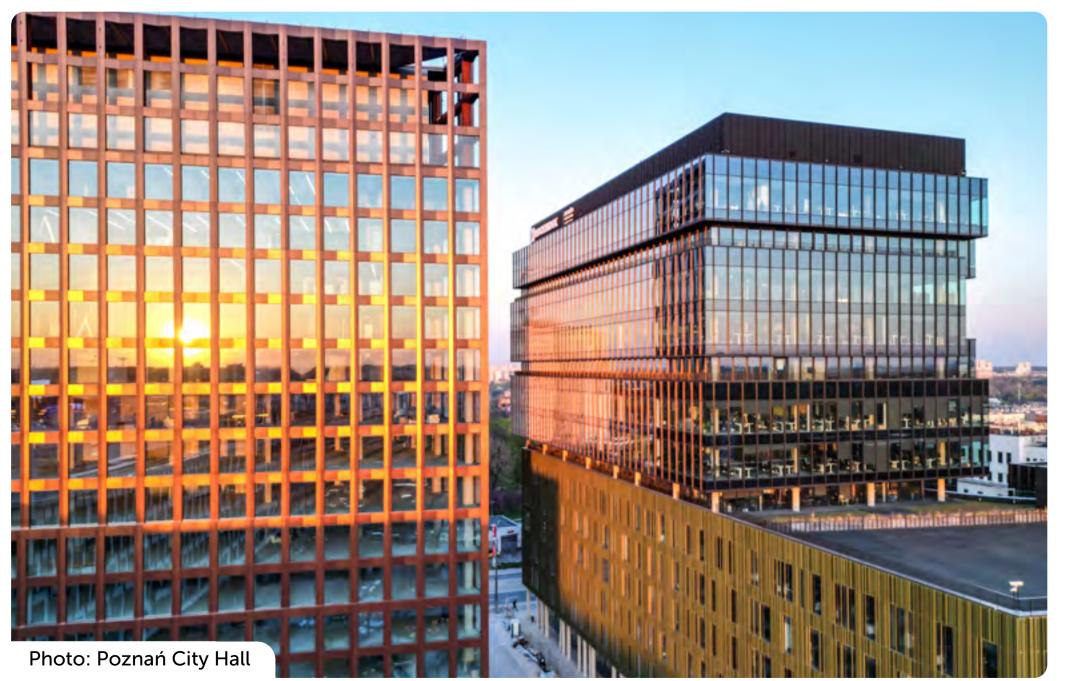


For a long time, Poznań distinguished itself as a leader in developing the modern services sector. It is here that the dynamic business development meets comprehensive support for both pre-existing and potential investors. Thanks to a stable business environment and modern infrastructure, we can create perfect conditions for international businesses seeking space to grow.

#### Jacek Jaskowiak

President of Poznań







#### A trade show capital

For many years, Poznań has been a host to many inspiring trade shows and congresses. The Poznań International Fair – Poland's biggest industrial fair – has been a large factor behind this. Each year, the Fair organizes the Impact Congress, one of the most important econo-technological events in Central-Eastern Europe. The conference gathers leading managers, political decision-makers, scientists and experts in numerous areas to discuss future challenges and trends. Last year's edition had such guests as the former US First Lady Michelle Obama, former Prime Minister of Finland Sanna Marin and the actor Jesse Eisenberg. In the coming years, the Fair is up for new challenges: in 2027, Poznań will host the largest event for the space industry: the IAC 2027 International Astronautical Congress.

#### Support not only for the investors

Poznań's business potential has been noticed and promoted by the Investor Service Bureau, initiating projects for varied recipient groups. One of them is the BPO/SSC Week – an event for middle schoolers allowing them to discover their opportunities in modern business services. During the event, they are assigned to various BPO/SSC companies, participating in a lecture of that company's representative and then visiting its headquarters for a dedicated open day.

IT professionals can enjoy the Pozitive Technologies conference, organized since 2019. This event is carried out under a hybrid model and focuses on the most innovative trends in the IT industry and areas related to Artificial Intelligence. Each year, it attracts an increasing number of technology enthusiasts, specialists and practitioners who all deliver lectures and lead workshops.



Poznań keeps steadily supporting the growth of the modern business services sector and our efforts are being appreciated internationally. During the CEE Business Services Summit & Awards 2024 conference, Poznań was awarded the title of the most dynamically growing city in Poland. This has been largely thanks to the increased number of investments in the BSS sector and initiatives supporting the growth of businesses in the outsourcing and shared services sectors. Poznań's strong position on the economic map of Europe was confirmed by the prestigious "European Cities and Regions of the Future 2023/2024" ranking by fDi Intelligence, which named it the second most business-friendly city and awarded it the seventh place in the overall ranking, following Rotterdam and exceeding cities such as Manchester.

Poznań's business-friendliness is the effect of consistently building infrastructure adjusted to the needs of investors, simplified administrative procedures and support the city provides to both large international corporations and local businesses.

#### Katja Lożina

Director of the Investor Service Bureau, Poznań City Hall



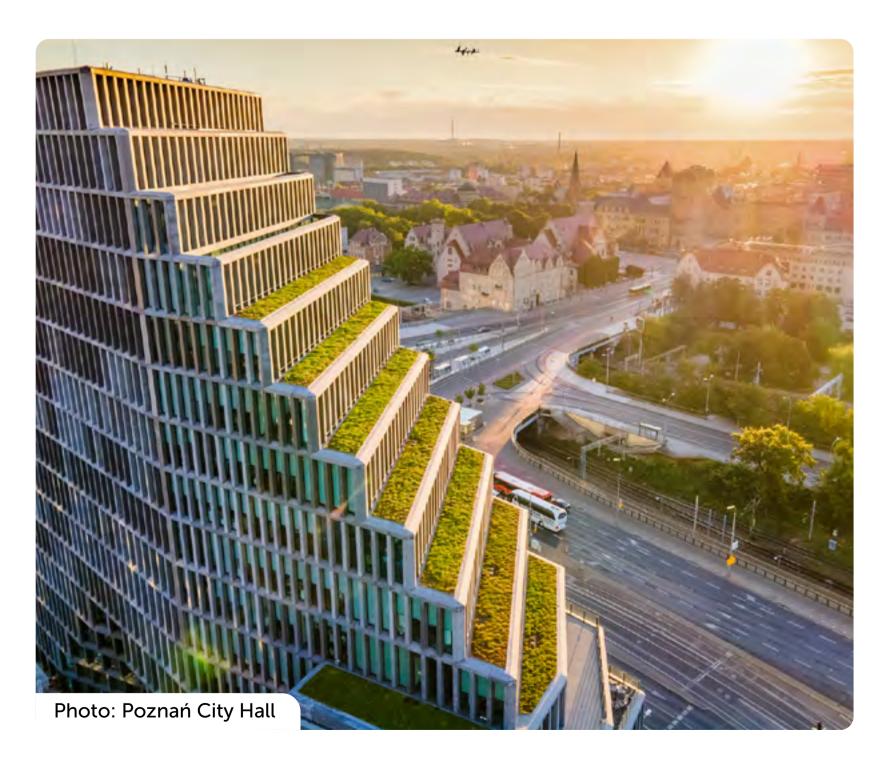
#### High quality of life

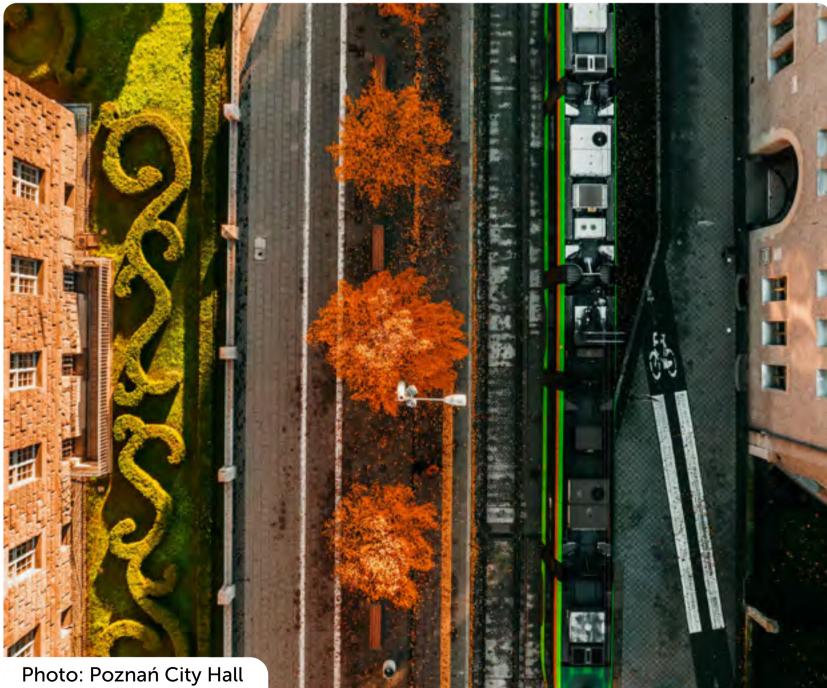
Greater Poland's capital was awarded the title of Poland's best city to live in by Business Insider Polska. Winning the ranking was made even sweeter by the fact it the rating was based on aspects valued by residents. The city is continuously investing in modern public transportation and bicycle infrastructure, expanding its cultural offer and has an exceptional amount of green areas. The high quality of life and resident happiness form priorities for the local authorities, as it is the community that creates Poznań's unique character.



The main, key advantage of our city is its people – open, tolerant, talented, ambitious, entrepreneurial and cultivating a unique work ethos. Each year, over 100,000 students choose Poznań's universities and many decide to build their future here. This allows us to provide the investor with access to highly qualified personnel, who form a foundation for the success of the modern business services sector.

**Jacek Jaśkowiak**President of Poznań











#### Bartosz Frąckowiak

Associate Director, Poznań Region



## Office real estate market

2024 has brought many positive changes to Poznań's real estate market, confirming the city's dynamic growth and increasing investor interest. Following expectations, the vacancy rate has fallen, signaling increased demand for office space in the region, despite a lower overall demand than a year before.

The growing demand for office space was paired with the increased importance of co-working spaces. The newly created flex projects reflect the needs of tenants seeking innovative solutions and flexibility. The increased demand for flexible office spaces and co-working spaces will remain high, as it reflects the preferences of both employers and employees, leaning toward hybrid work.

In 2024, the issues of sustainable growth remained important for businesses and the market situation has once again required the tenants to adopt a flexible approach to business. Investments in sustainable growth and green construction, as well as the growing importance of certifications such as BREEAM and LEED will remain a key trend in Poznań's office market throughout 2025.

Another key issue impacting the office real estate market in 2024 took the form of inflation, which has led to a notable increase in service fees. In response to the growing expenditures, renters increased rental rates in prestigious office buildings. While the older, less attractive locations have to attract tenants with price, rent in premium-grade downtown buildings will keep growing.

Poznań's market sports many examples of office space optimization. In 2024, the IT industry has chosen to sublease and reduce rented space. Businesses from this sector have noticed the need to more effectively manage one's resources, which often led to rethinking their strategy concerning the occupied space.





#### **Salaries**

## Salaries

The benchmark has been created by Grafton Recruitment experts. The pay ranges are provided in gross monthly PLN pay. The values presented in the research encompass both factual market values and 2025 forecasts. In this edition, we have also added the category of most commonly offered pay. The lower value of a pay range indicates the lowest salary allowing one to hire a given specialist, while the higher value describes the amount necessary to hire a specialist with most experience, knowledge or skills.

The salaries in key areas were categorized based on location and experience:

**Entry level** 

up to a year of experience

**Specialist** 

1-3 years of experience

Senior specialist

3-5 years of experience

Team leader

at least a year of experience as a leader

Manager

at least a year of experience as a manager



## Top Leadership and Support Roles





#### **Top Leadership and Support Roles**

		Cracow			Warsaw			Wrocław			Gdańsk	
		2025			2025			2025			2025	
	min	max	NO	min	max	NO	min	max	NO	min	max	NO
Head of SSC												
<300 FTE	30,000	47,000	35,000	40,000	50,000	45,000	27,000	40,000	35,000	27,000	40,000	35,000
300 – 1 000 FTE	35,000	57,000	45,000	50,000	65,000	55,000	35,000	45,000	40,000	35,000	45,000	40,000
+ 1000 FTE	37,000	70,000	57,000	65,000	85,000	75,000	40,000	55,000	50,000	40,000	55,000	50,000
Head of Finance	24,000	40,000	30,000	30,000	40,000	35,000	25,000	40,000	35,000	25,000	40,000	35,000
(Senior) Operations Manager	17,000	33,000	25,000	30,000	50,000	40,000	16,000	30,000	25,000	16,000	30,000	25,000
Service Delivery Manager	18,000	30,000	25,000	23,000	33,000	30,000	16,000	28,000	23,000	16,000	28,000	23,000
Improvement Process Manager	18,000	30,000	23,000	20,000	30,000	25,000	18,000	25,000	23,000	18,000	25,000	23,000

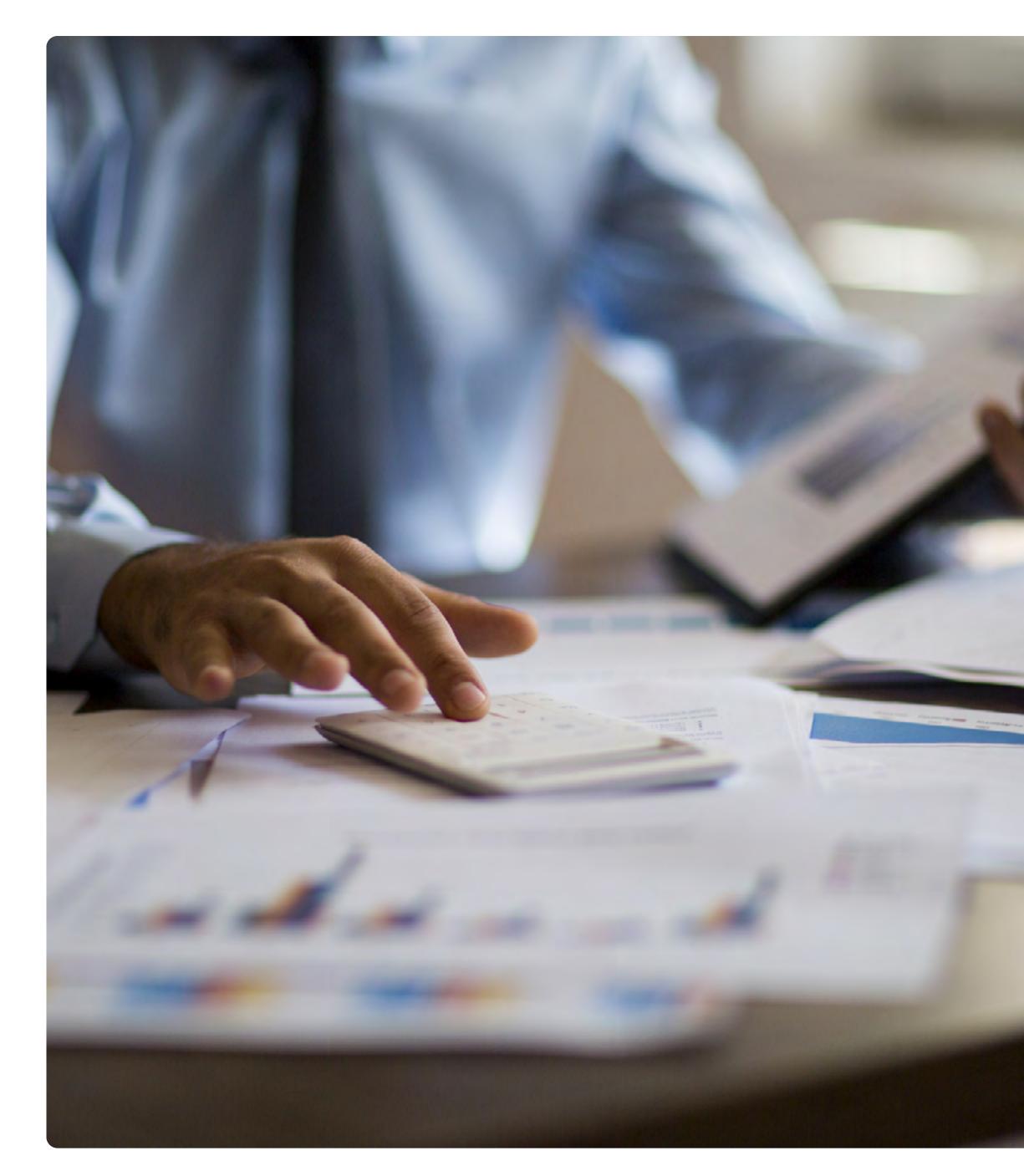
		Katowice			Łódź			Poznań		
		2025			2025		2025			
	min	max	NO	min	max	NO	min	max	NO	
Head of SSC										
<300 FTE	27,000	38,000	35,000	27,000	40,000	35,000	27,000	40,000	35,000	
300 – 1 000 FTE	35,000	45,000	38,000	35,000	45,000	38,000	37,000	50,000	42,000	
+ 1000 FTE	40,000	55,000	48,000	40,000	55,000	50,000	45,000	55,000	50,000	
Head of Finance	25,000	40,000	32,000	27,000	44,000	35,000	25,000	40,000	33,000	
(Senior) Operations Manager	16,000	28,000	23,000	20,000	35,000	25,000	18,000	30,000	25,000	
Service Delivery Manager	17,000	25,000	22,000	20,000	28,000	25,000	17,000	25,000	23,000	
Improvement Process Manager	18,000	27,000	23,000	19,000	27,000	24,000	18,000	25,000	23,000	



## Finance and Accounting

### Top 3 most sought after positions in 2025:

- RtR Specialist/Senior
- Finance Analyst
- Financial Controller





		Cracow			Warsaw			Wrocław			Gdańsk	
		2025			2025			2025			2025	
	min	max	NO	min	max	NO	min	max	NO	min	max	NO
P2P												
junior specialist	5,300	6,700	6,300	6,000	7,000	7,000	5,500	6,500	5,800	5,500	6,500	5,800
specialist	6,500	8,500	7,300	8,000	9,500	9,000	6,500	8,000	7,500	6,500	8,000	7,500
senior specialist	8,500	11,500	9,700	10,000	12,000	11,000	8,000	11,000	9,500	8,000	11,000	9,500
team leader	11,000	15,000	12,500	14,000	16,000	15,500	11,000	16,000	14,000	11,000	16,000	14,000
manager	15,000	20,000	17,000	18,000	22,000	20,000	15,000	19,000	17,000	15,000	19,000	17,000
R2R												
junior specialist	5,700	7,500	6,800	7,500	9,000	8,000	6,000	7,000	6,500	6,000	7,000	6,500
specialist	7,500	9,500	8,500	9,000	12,000	11,500	7,000	10,000	9,000	7,000	10,000	9,000
senior specialist	9,500	13,000	11,000	12,500	15,000	13,000	9,000	14,000	12,000	9,000	14,000	12,000
team leader	13,000	17,000	15,000	18,000	21,000	19,000	14,000	18,000	16,000	14,000	18,000	16,000
manager	17,000	22,000	18,500	20,000	25,000	23,000	18,000	24,000	20,000	18,000	24,000	20,000
ОТС												
junior specialist	5,700	6,700	6,300	6,000	7,000	7,000	5,500	6,500	5,800	5,500	6,500	5,800
specialist	6,500	8,500	7,300	8,000	9,500	9,000	6,500	8,000	7,500	6,500	8,000	7,500
senior specialist	8,500	11,500	9,700	10,000	12,000	11,000	8,000	11,000	9,000	8,000	11,000	9,000
team leader	11,000	15,000	12,500	14,000	16,000	15,500	11,000	16,000	14,000	11,000	16,000	14,000
manager	15,000	20,000	17,000	18,000	22,000	20,000	15,000	19,000	18,000	15,000	19,000	18,000
Master Data Management												
junior specialist	5,500	7,000	6,300	6,000	7,500	7,000	6,000	6,500	6,200	6,000	6,500	6,200
specialist	7,000	9,000	8,000	7,500	9,000	8,500	6,500	8,500	8,000	6,500	8,500	8,000
senior specialist	8,500	11,500	10,000	10,000	13,000	11,000	8,500	12,000	11,000	8,500	12,000	11,000
team leader	12,000	16,000	14,500	14,000	16,000	15,000	12,000	15,000	14,000	12,000	15,000	14,000
manager	15,000	19,000	17,000	17,000	20,000	18,500	15,000	18,000	16,000	15,000	18,000	16,000



		Katowice			Łódź		min max  6,000 6,500 6,500 8,000 8,500 10,000 12,000 15,000 16,000 7,000 7,500 10,000		
		2024			2024		6,0006,5006,5008,0008,50010,00012,00015,00016,00019,000		
	min	max	NO	min	max	NO	min	max	NO
P2P									
junior specialist	5,200	6,500	5,500	5,500	6,500	5,500	6,000	6,500	6,000
specialist	6,500	8,000	7,500	6,500	8,000	7,000	6,500	8,000	7,500
senior specialist	8,000	11,000	9,500	8,500	11,000	9,500	8,500	10,000	9,000
team leader	11,000	15,000	13,000	12,000	14,000	12,000	12,000	15,000	13,500
manager	14,500	18,000	17,000	14,000	18,000	16,000	16,000	19,000	18,000
R2R									
junior specialist	5,500	6,800	6,000	5,500	6,500	6,000	6,000	7,000	6,500
specialist	6,800	9,500	8,500	7,000	11,000	9,000	7,500	10,000	9,000
senior specialist	9,500	13,000	11,000	11,000	14,000	12,000	10,000	13,000	12,000
team leader	13,000	16,500	15,000	14,000	17,000	16,000	14,000	17,000	16,000
manager	16,500	20,000	18,000	18,000	22,000	20,000	18,000	22,000	20,000
ОТС									
junior specialist	5,200	6,500	5,500	5,500	6,500	6,000	6,000	6,500	6,000
specialist	6,500	8,000	7,500	6,500	9,000	7,500	6,500	8,000	7,500
senior specialist	8,000	11,000	9,500	9,000	11,000	10,000	8,500	10,000	9,000
team leader	11,000	15,000	13,000	11,000	14,000	12,000	12,000	15,000	13,500
manager	14,500	18,000	17,000	14,000	18,000	14,000	16,000	19,000	18,000
Master Data Management									
junior specialist	5,200	6,500	6,000	5,500	6,500	6,000	5,500	6,500	6,000
specialist	6,500	8,500	7,500	6,500	10,000	9,000	7,000	9,000	8,000
senior specialist	8,500	12,000	10,500	10,000	13,000	12,000	9,000	12,000	11,500
team leader	12,000	15,000	14,000	13,000	15,000	14,000	12,000	15,000	14,000
manager	15,000	18,000	17,000	15,000	18,000	16,500	15,000	18,000	16,000



		Cracow			Warsaw			Wrocław			Gdańsk	
		2025			2025			2025			2025	
	min	max	NO	min	max	NO	min	max	NO	min	max	NO
Financial Planning & Analysis	_											
junior specialist	5,800	8,000	7,000	8,000	9,500	9,000	6,000	7,000	6,500	6,000	7,000	6,500
specialist	8,000	10,000	9,000	10,000	13,000	13,000	7,000	10,000	8,500	7,000	10,000	8,500
senior specialist	10,000	14,000	12,000	14,000	18,000	16,000	10,000	14,000	12,500	10,000	14,000	12,500
team leader	13,000	18,000	16,000	18,000	22,000	20,000	14,000	17,000	16,000	14,000	17,000	16,000
manager	17,000	22,000	18,500	23,000	30,000	26,000	16,000	20,000	18,000	16,000	20,000	18,000
Billing												
junior specialist	5,700	7,000	6,500	7,000	8,000	7,500	5,500	6,000	5,800	5,500	6,000	5,800
specialist	7,000	9,000	8,500	8,500	10,500	9,500	6,500	8,000	7,500	6,500	8,000	7,500
senior specialist	9,000	12,000	11,000	10,000	12,000	11,500	9,000	10,000	9,500	9,000	10,000	9,500
team leader	12,000	16,000	14,000	14,000	16,000	15,000	11,000	15,000	13,000	11,000	15,000	13,000
manager	15,000	20,000	17,000	17,000	20,000	19,000	15,000	18,000	16,000	15,000	18,000	16,000
Independent Accountant												
	9,000	15,000	12,000	12,000	16,000	14,000	9,000	14,000	12,000	9,000	14,000	12,000
Chief Accountant												
	14,000	27,000	18,000	19,000	25,000	23,000	14,000	25,000	18,000	14,000	25,000	18,000
Accounting Manager												
	15,000	28,000	22,000	23,000	30,000	26,000	16,000	25,000	20,000	16,000	25,000	20,000
Statutory Accountant												
	14,000	18,000	16,000	15,000	18,000	16,500	15,000	20,000	18,000	15,000	20,000	18,000
Statutory Manager												
	18,000	26,000	22,000	20,000	28,000	24,000	20,000	30,000	25,000	20,000	30,000	25,000
Accounting Controller												
	16,000	23,000	18,000	17,000	23,000	19,000	18,000	22,000	20,000	18,000	22,000	20,000



		Katowice			Łódź			Poznań	
		2024			2024			2024	
	min	max	NO	min	max	NO	min	max	NO
Financial Planning & Analysis									
unior specialist	5,800	7,000	6,500	5,500	6,500	6,000	6,000	6,500	6,000
pecialist	7,000	10,000	8,500	6,500	10,000	9,000	7,000	10,000	8,500
senior specialist	10,000	14,000	12,500	10,000	13,000	12,000	11,000	15,000	12,500
eam leader	14,000	16,000	15,000	13,000	15,000	14,000	15,000	17,000	16,000
nanager	16,000	20,000	17,000	15,000	18,000	16,500	17,000	20,000	18,000
Billing									
unior specialist	5,200	6,500	5,500	5,500	6,500	6,200	5,500	6,000	6,000
pecialist	6,500	8,000	7,000	6,500	8,000	7,500	6,500	8,000	7,500
senior specialist	8,000	10,000	9,000	8,500	10,000	9,000	9,000	10,000	9,500
eam leader	10,000	15,000	13,000	10,500	14,000	13,000	11,000	15,000	13,000
nanager	15,000	18,000	17,000	14,000	18,000	17,000	15,000	18,000	16,000
ndependent Accountant									
	9,000	13,000	12,000	9,000	13,000	11,000	10,000	14,000	12,000
Chief Accountant									
	14,000	23,000	17,000	17,000	23,000	20,000	16,000	25,000	19,000
Accounting Manager									
	15,000	25,000	20,000	17,000	19,000	18,000	17,000	25,000	20,000
Statutory Accountant									
	14,000	18,000	16,000	14,000	18,000	15,000	15,000	18,000	15,000
Statutory Manager									
	18,000	28,000	23,000	20,000	26,000	24,000	22,000	28,000	24,000
Accounting Controller									
	17 000	20 000	19 000	17 000	19 000	18 000	18 000	22 000	20 000



All Poland	_	

	min	max	NO
Audit & Risk Management			
junior specialist	8,000	10,000	9,000
specialist	10,000	14,000	12,000
senior specialist	14,000	20,000	17,000
team leader	18,000	23,000	20,000
manager	20,000	30,000	25,000

	min	max	NO
Тах			
junior specialist	8,500	10,000	9,500
specialist	10,000	14,000	12,000
senior specialist	13,000	16,000	15,000
team leader	15,000	20,000	17,000
manager	19,000	28,000	25,000

**All Poland** 



## 

## Business Intelligence

### Top 3 most sought after positions in 2025:

- Data Engineer
- BI Specialist
- Data Analyst

```
.on(a){try{a()}catch(g){
              ("gbar.mls", function()()
              cion(){for(var a=function
             U();_.Ja(e,"api").Ra();f
              &&(c=c.querySelector(".go
elector(".gb_8"),op=/(\s+|^)gb_2f(\s+|$)
.x("gbar.close",(0,_.v)(pp.wd,pp)): _v(*
```



#### **Business Intelligence**

#### **All Poland**

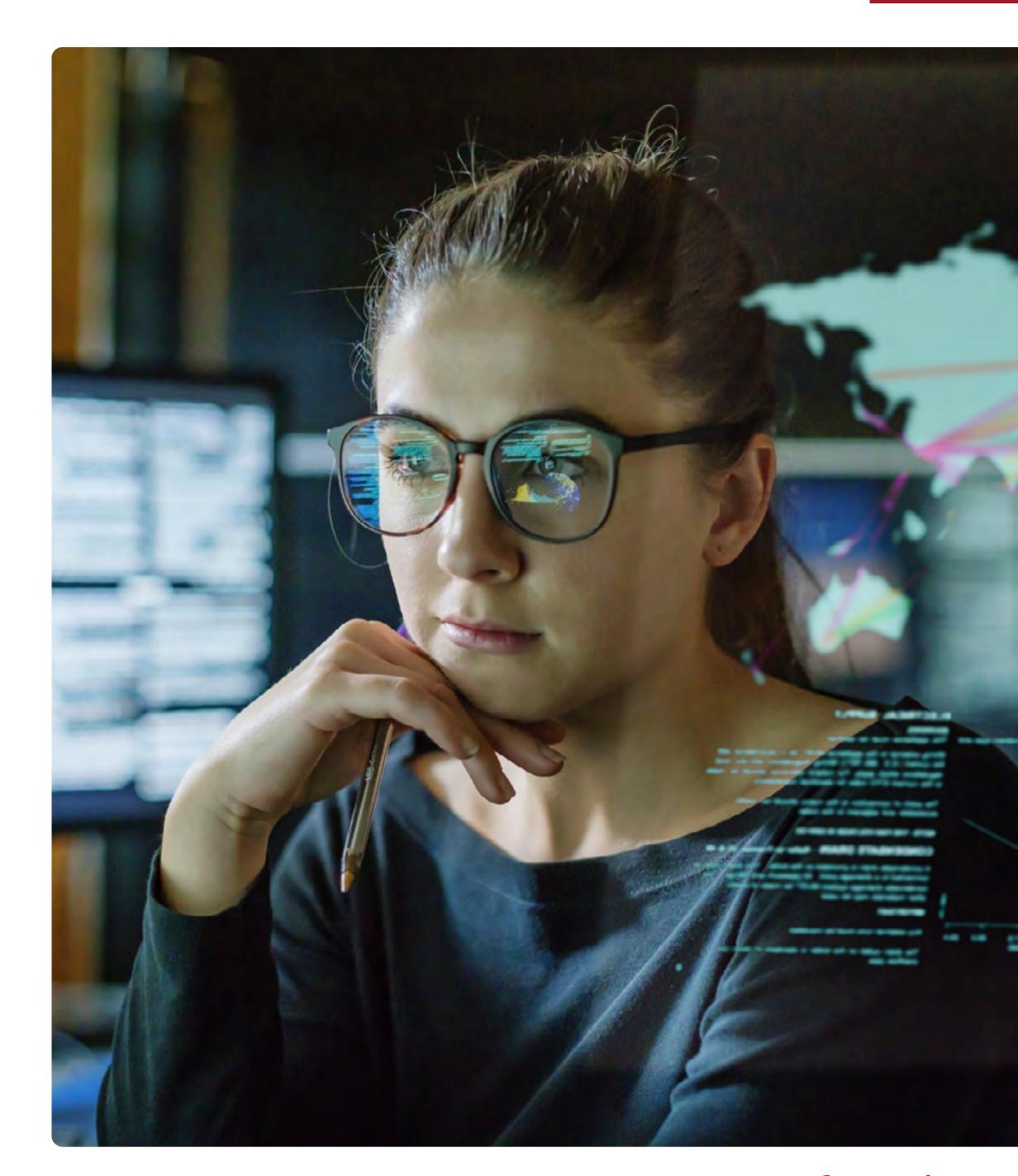
	min	max	NO
BI Specialist	12,000	18,000	16,000
BI Manager	25,000	32,000	28,000
DWH Engineer	17,000	23,000	21,000
Data Analyst	13,000	18,000	15,000
Data Engineer	16,000	22,000	20,000
Database Administrator	13,000	18,000	16,000
Database Developer	15,000	20,000	18,000
Data Manager	27,000	35,000	30,000
Al Developer	18,000	27,000	23,000
RPA Developer	10,000	15,000	13,000



## T Processes

## Top 3 most sought after positions in 2025:

- Technical Support Engineer
- SAP Consultant
- Network Engineer





#### **IT Processes**

II PIOCESSES		Cracow	Cracow Warsaw Wrocław					Gdańsk				
		2025			2025			2025			2025	
	min	max	NO	min	max	NO	min	max	NO	min	max	NO
Service Desk												
Technical Support 1st Line	6,500	9,000	7,500	6,000	9,000	7,500	6,500	8,500	8,000	6,500	8,500	8,500
Technical Support 2nd Line	7,500	12,500	10,500	8,000	12,000	10,000	8,000	11,000	10,000	8,000	11,000	10,000
<b>Technical Support 3nd Line</b>	11,500	16,500	13,500	11,000	15,000	13,000	11,000	14,000	13,000	11,000	14,000	13,000
Service Desk Leader	14,000	17,000	15,500	14,000	17,000	16,000	14,000	17,000	15,000	14,000	17,000	15,000
Service Desk Manager	15,500	20,000	17,000	16,000	20,000	18,000	16,000	20,000	18,000	16,000	20,000	18,000
Network												
Network Analyst	8,000	13,000	10,000	8,000	13,000	10,000	8,000	11,000	10,000	8,000	11,000	10,000
Network Engineer	15,000	21,000	18,000	15,000	20,000	17,000	14,000	20,000	15,000	14,000	20,000	15,000
Network Architect	24,000	30,000	26,000	24,000	28,000	26,000	24,000	28,000	27,000	24,000	28,000	27,000
Project Management												
PMO	10,000	16,000	14,000	10,000	15,000	12,000	12,000	16,000	14,000	12,000	16,000	14,000
Project Manager	17,000	26,000	19,000	19,000	24,000	21,000	18,000	25,000	22,000	18,000	25,000	22,000
Program Manager	24,000	30,000	27,000	23,000	30,000	27,000	23,000	30,000	26,000	23,000	30,000	25,000
SAP												
SAP Funtional Consultant (FI/CO, HCM, PP, MM, SD)	17,000	28,000	25,000	19,000	29,000	24,000	18,000	28,000	23,000	18,000	28,000	23,000
SAP Support Consultant/Analyst	12,000	20,000	17,000	12,000	17,000	14,000	14,000	20,000	17,000	14,000	20,000	17,000
SAP Basis Consultant	19,000	27,000	22,000	21,000	27,000	23,000	18,000	27,000	24,000	18,000	27,000	23,000
Integration Consultant (PI)	20,000	28,000	25,000	23,000	30,000	27,000	22,000	28,000	25,000	22,000	28,000	25,000
SAP Team Leader	21,000	27,000	26,000	23,000	30,000	27,000	20,000	25,000	23,000	20,000	25,000	23,000
SAP Manager	25,000	33,000	28,000	28,000	35,000	31,000	25,000	33,000	28,000	25,000	33,000	28,000
SAP Center Head	30,000	40,000	34,000	30,000	40,000	35,000	30,000	40,000	35,000	30,000	40,000	35,000
Application Management												
Application Support Specialist (support)	9,500	15,000	11 000	9,000	16,000	13,000	10,000	15,000	13,000	10,000	15,000	13,000
Application Support Specialist (supportdevelopment)	13,000	18,000	15,000	14,000	19,000	16,000	13,000	18,000	15,000	13,000	18,000	15,000
SharePoint Engineer	14,000	19,000	16,000	15,000	20,000	17,000	14,000	19,000	16,000	14,000	19,000	16,000
Application Management Lead	16,000	20,000	18,000	17,000	22,000	19,000	16,000	20,000	18,000	16,000	20,000	18,000
Application Support Manager	18,000	23,000	20,000	20,000	25,000	22,000	17,000	22,000	20,000	17,000	22,000	20,000



#### **IT Processes**

11 1 10003		Katowice			Łódź			Poznań	
		2024			2024			2024	
	min	max	NO	min	max	NO	min	max	NO
Service Desk									
Technical Support 1st Line	6,500	8,500	8,000	6,000	8,000	8,000	6,500	8,500	8,000
Technical Support 2nd Line	8,000	12,000	10,000	8,000	11,000	10,000	8,000	11,000	10,000
Technical Support 3nd Line	11,000	15,000	13,000	11,000	14,000	12,000	11,000	14,000	12,000
Service Desk Leader	14,000	17,000	16,000	14,000	16,000	15,000	14,000	16,000	15,000
Service Desk Manager	16,000	20,000	18,000	16,000	20,000	18,000	16,000	20,000	18,000
Network									
Network Analyst	8,000	11,000	9,000	8,000	11,000	9,000	8,000	11,000	9,000
Network Engineer	14,000	20,000	16,000	14,000	19,000	16,000	14,000	21,000	19,000
Network Architect	24,000	30,000	28,000	21,000	29,000	27,000	21,000	30,000	29,000
Project Management									
PMO	14,000	19,000	17,000	13,000	19,000	16,000	13,000	19,000	16,000
Project Manager	20,000	25,000	21,000	16,000	24,000	22,000	16,000	24,000	22,000
Program Manager	23,000	30,000	27,000	23,000	26,000	24,000	23,000	27,000	25,000
SAP									
SAP Funtional Consultant (FI/CO, HCM, PP, MM, SD)	18,000	28,000	23,000	16,000	28,000	22,000	16,000	28,000	21,000
SAP Support Consultant/Analyst	14,000	20,000	17,000	14,000	22,000	18,000	14,000	22,000	17,000
SAP Basis Consultant	20,000	27,000	23,000	18,000	26,000	23,000	18,000	25,000	23,000
Integration Consultant (PI)	22,000	28,000	26,000	22,000	26,000	24,000	22,000	26,000	24,000
SAP Team Leader	20,000	25,000	23,000	20,000	25,000	23,000	20,000	25,000	23,000
SAP Manager	25,000	32,000	28,000	23,000	32,000	28,000	23,000	30,000	28,000
SAP Center Head	30,000	40,000	35,000	30,000	40,000	35,000	30,000	40,000	35,000
Application Management									
Application Support Specialist (support)	10,000	15,000	12,000	11,000	14,000	13,000	11,000	14,000	12,000
Application Support Specialist (suppor-tdevelopment)	13,000	18,000	15,000	12,000	17,000	15,000	12,000	17,000	15,000
SharePoint Engineer	14,000	18,000	16,000	12,000	15,000	14,000	12,000	15,000	14,000
Application Management Lead	16,000	20,000	18,000	16,000	20-000	18,000	16,000	19,000	18,000
Application Support Manager	17,000	22,000	20,000	18,000	22,000	21,000	18,000	22,000	21,000



## Human Resources

## Top 3 most sought after positions in 2025:

- Payroll Specialist
- HR Reporting Analyst
- HR BP





		Cracow			Warsaw			Wrocław			Gdańsk		
		2025			2025			2025			2025		
	min	max	NO	min	max	NO	min	max	NO	min	max	NO	
Compensation & Benefits													
junior specialist	5,300	6,700	6,000	6,000	7,500	7,000	5,500	6,000	5,500	5,500	6,000	5,500	
specialist	6,500	8,500	7,000	8,000	9,500	9,000	6,000	8,500	8,000	6,000	8,500	8,000	
senior specialist	8,500	10,500	9,500	10,000	14,000	13,000	8,500	10,500	9,500	8,500	10,500	9,500	
team leader	11,000	15,000	12,000	14,000	17,000	15,000	11,000	14,000	13,000	11,000	14,000	13,000	
manager	14,000	17,000	15,000	16,000	20,000	18,000	14,000	17,000	16,000	14,000	17,000	16,000	
HR Administration & Reporting													
junior specialist	5,300	6,700	6,000	6,000	7,000	6,500	5,500	6,000	6,000	5,500	6,000	6,000	
specialist	6,500	8,500	7,500	7,500	9,000	8,000	6,500	8,500	7,500	6,500	8,500	7,500	
senior specialist	8,500	10,500	9,500	9,500	11,000	10,000	8,500	11,000	10,000	8,500	11,000	10,000	
team leader	11,000	15,000	13,500	12,000	15,000	13,000	11,000	14,000	13,000	11,000	14,000	13,000	
manager	14,000	17,500	16,000	15,000	20,000	17,000	14,000	17,000	16,000	14,000	17,000	16,000	
Talent Acquisition, Employer Bran	nding												
junior specialist	5,000	6,700	5,700	5,500	7,000	6,500	5,500	6,000	6,000	5,500	6,000	6,000	
specialist	6,500	8,500	7,500	7,500	10,000	9,000	7,000	9,000	9,000	7,000	9,000	9,000	
senior specialist	8,500	12,000	10,000	11,000	15,000	13,500	9,000	12,500	11,500	9,000	12,500	11,500	
team leader	12,000	17,000	14,000	14,000	16,000	15,000	12,000	16,000	15,000	12,000	16,000	15,000	
manager	16,000	20,000	18,000	17,000	22,000	19,000	16,000	20,000	18,000	16,000	20,000	18,000	



		Katowice			Łódź		Poznań				
		2024			2024			2024			
	min	max	NO	min	max	NO	min	max	NO		
Compensation & Benefits											
junior specialist	5,200	6,000	5,500	5,500	6,000	5,500	5,500	6,000	5,500		
specialist	6,000	8,500	7,500	6,500	9,000	7,500	6,000	9,000	8,000		
senior specialist	8,500	11,000	9,500	9,000	11,000	10,000	8,500	10,000	9,500		
team leader	11,000	14,000	13,000	12,000	14,000	13,000	12,000	14,000	13,000		
manager	14,000	17,000	15,500	13,000	16,000	15,000	14,000	17,000	16,000		
HR Administration & Reporting											
junior specialist	5,200	6,500	5,500	5,500	6,500	5,500	5,500	6,000	6,000		
specialist	6,500	8,500	7,500	6,500	8,500	7,500	6,500	8,500	7,500		
senior specialist	8,500	11,000	9,500	8,500	11,000	10,000	8,500	11,000	9,500		
team leader	11,000	14,000	13,000	11,000	14,000	12,000	11,000	14,000	13,000		
manager	14,000	17,000	15,000	13,000	15,000	14,000	14,000	17,000	15,000		
Talent Acquisition, Employer Brand	ing										
junior specialist	5,200	6,500	6,000	5,500	6,000	6,000	5,500	6,000	6,000		
specialist	6,500	8,500	8,000	6,500	8,500	8,000	7,000	9,000	9,000		
senior specialist	8,500	12,000	10,000	9,000	12,000	10,500	9,000	12,500	11,000		
team leader	12,000	16,000	13,000	11,000	14,000	13,000	12,000	16,000	14,000		
manager	16,000	20,000	18,000	13,000	16,000	15,000	16,000	20,000	18,000		



	Cracow			Warsaw			Wrocław			Gdańsk		
	2025			2025			2025			2025		
min	max	NO	min	max	NO	min	max	NO	min	max	NO	
5,300	6,700	5,800	6,000	7,000	6,500	5,500	6,500	6,000	5,500	6,500	6,000	
6,500	8,500	7,000	8,000	11,000	10,000	6,500	9,000	8,000	6,500	9,000	8,000	
8,500	13,000	10,000	12,000	14,000	13,000	9,000	11,000	10,000	9,000	11,000	10,000	
12,000	17,000	14,000	15,000	18,000	16,000	11,000	15,000	14,000	11,000	15,000	14,000	
16,000	20,000	17,500	17,000	22,000	19,000	14,000	19,000	17,000	14,000	19,000	17,000	
9,000	11,000	10,000	10,000	13,000	12,000	9,000	11,000	10,000	9,000	11,000	10,000	
11,000	14,000	12,500	12,000	18,000	16,000	11,000	15,000	14,000	11,000	15,000	14,000	
13,000	18,500	16,000	16,000	25,000	21,000	15,000	18,000	17,000	15,000	18,000	17,000	
16,000	26,000	20,000	20,000	27,000	23,000	16,000	25,000	20,000	16,000	25,000	20,000	
21,000	30,000	26,000	25,000	35,000	28,000	22,000	35,000	28,000	22,000	35,000	28,000	
	5,300 6,500 8,500 12,000 16,000 9,000 11,000 13,000	min max  5,300 6,700 6,500 8,500 8,500 13,000 12,000 17,000 16,000 20,000  9,000 11,000 11,000 14,000 13,000 18,500	min         max         NO           5,300         6,700         5,800           6,500         8,500         7,000           8,500         13,000         10,000           12,000         17,000         14,000           16,000         20,000         17,500           9,000         11,000         10,000           11,000         14,000         12,500           13,000         18,500         16,000           16,000         26,000         20,000	min         max         NO         min           5,300         6,700         5,800         6,000           6,500         8,500         7,000         8,000           8,500         13,000         10,000         12,000           12,000         17,000         14,000         15,000           16,000         20,000         17,500         17,000           9,000         11,000         10,000         10,000           11,000         14,000         12,500         12,000           13,000         18,500         16,000         16,000           16,000         26,000         20,000         20,000	min         max         NO         min         max           5,300         6,700         5,800         6,000         7,000           6,500         8,500         7,000         8,000         11,000           8,500         13,000         10,000         12,000         14,000           12,000         17,000         14,000         15,000         18,000           16,000         20,000         17,500         17,000         22,000           9,000         11,000         10,000         10,000         13,000           11,000         14,000         12,500         12,000         18,000           13,000         18,500         16,000         16,000         25,000           16,000         26,000         20,000         20,000         27,000	min         max         NO         min         max         NO           5,300         6,700         5,800         6,000         7,000         6,500           6,500         8,500         7,000         8,000         11,000         10,000           8,500         13,000         10,000         12,000         14,000         13,000           12,000         17,000         14,000         15,000         18,000         16,000           16,000         20,000         17,500         17,000         22,000         19,000           11,000         14,000         12,500         12,000         18,000         16,000           13,000         18,500         16,000         16,000         25,000         21,000           16,000         26,000         20,000         20,000         27,000         23,000	min         max         NO         min         max         NO         min         max         NO         min           5,300         6,700         5,800         6,000         7,000         6,500         5,500           6,500         8,500         7,000         8,000         11,000         10,000         6,500           8,500         13,000         10,000         12,000         14,000         13,000         9,000           12,000         17,000         14,000         15,000         18,000         16,000         11,000           16,000         20,000         17,500         17,000         22,000         19,000         14,000           11,000         14,000         12,500         12,000         18,000         16,000         10,000           13,000         18,500         16,000         16,000         25,000         21,000         15,000           16,000         26,000         20,000         20,000         27,000         23,000         16,000	min         max         NO         min         max         NO         min         max         NO         min         max           5,300         6,700         5,800         6,000         7,000         6,500         5,500         6,500           6,500         8,500         7,000         8,000         11,000         10,000         6,500         9,000           8,500         13,000         10,000         12,000         14,000         13,000         9,000         11,000           12,000         17,000         15,000         18,000         16,000         14,000         15,000           16,000         20,000         17,500         17,000         22,000         19,000         14,000         19,000           11,000         14,000         12,500         12,000         18,000         16,000         15,000         15,000           13,000         18,500         16,000         25,000         21,000         15,000         18,000           16,000         26,000         20,000         20,000         27,000         23,000         16,000         25,000	min         max         NO         min         max         NO         min         max         NO         min         max         NO           5,300         6,700         5,800         6,000         7,000         6,500         5,500         6,500         6,000           6,500         8,500         7,000         8,000         11,000         10,000         6,500         9,000         8,000           8,500         13,000         10,000         12,000         14,000         13,000         9,000         11,000         10,000           12,000         17,000         14,000         15,000         16,000         11,000         15,000         14,000           16,000         20,000         17,500         17,000         22,000         19,000         14,000         19,000         10,000           11,000         14,000         12,000         18,000         16,000         11,000         10,000         10,000           11,000         14,000         12,000         18,000         16,000         11,000         15,000         14,000           13,000         18,500         16,000         25,000         21,000         15,000         18,000         17,000	min         max         NO         min           5,300         6,700         5,800         6,000         7,000         6,500         5,500         6,500         5,500         6,500         5,500           6,500         8,500         7,000         8,000         11,000         10,000         6,500         9,000         8,000         6,500           8,500         13,000         10,000         12,000         14,000         13,000         9,000         11,000         10,000         9,000           12,000         17,000         14,000         15,000         16,000         14,000         15,000         14,000         17,000         14,000           16,000         20,000         17,500         17,000         22,000         19,000         14,000         10,000         9,000           11,000         14,000         12,500         12,000         18,000         16,000         15,000         14,000         17,000         15,000           13,000         18,500         16,000         25,000         21,000         15,000 <t< td=""><td>  2025   2025   2025   2025   2025   2025   2025    </td></t<>	2025   2025   2025   2025   2025   2025   2025	



		Katowice			Łódź		Poznań			
		2024			2024			2024		
	min	max	NO	min	max	NO	min	max	NO	
Payroll										
junior specialist	5,200	6,500	5,800	5,200	6,500	5,700	5,500	6,500	6,000	
specialist	6,500	8,500	7,500	6,000	8,500	7,000	6,500	9,000	7,500	
senior specialist	8,500	12,000	10,500	8,000	11,000	9,000	9,000	11,000	9,500	
team leader	12,000	16,000	13,000	11,000	14,000	13,000	11,000	14,000	13,000	
manager	16,000	19,000	17,000	15,000	19,000	17,000	14,000	18,000	16,000	
HR Business Partner										
junior specialist	9,000	11,000	10,000	9,000	12,000	11,000	9,000	11,000	10,000	
specialist	11,000	14,000	12,000	11,000	14,000	12,000	11,000	15,000	14,000	
senior specialist	14,000	18,000	16,000	13,000	17,000	15,000	15,000	18,000	17,000	
HR Manager										
	16,000	24,000	20,000	18,000	24,000	20,000	16,000	24,000	20,000	
HR Director										
	20,000	32,000	28,000	25,000	35,000	28,000	23,000	32,000	28,000	

	Cała Polska							
	min	max	NO					
Mobility & Immigration								
junior specialist	6,500	7,500	7,000					
specialist	7,500	9,000	8,500					
senior specialist	9,000	12,000	10,500					
team leader	12,000	14,000	12,000					
manager	14,000	17,000	15,000					

		Cała Polska	1
	min	max	NO
Talent Management, Learning an	d Development		
junior specialist	6,500	7,500	7,000
specialist	8,000	10,000	9,000
senior specialist	10,000	13,000	11,500
team leader	14,000	16,000	15,000
manager	16,000	22,000	18,000







		Cracow			Warsaw			Wrocław			Gdańsk		
		2025			2025			2025			2025		
	min	max	NO	min	max	NO	min	max	NO	min	max	NO	
Visual graphic													
junior specialist	5,300	6,700	6,000	6,500	7,500	7,000	5,000	6,500	5,500	5,000	6,500	5,500	
specialist	6,500	8,000	7,000	7,500	9,000	8,000	6,500	7,500	7,000	6,500	7,500	7,000	
senior specialist	8,000	10,000	9,000	9,000	12,000	10,000	7,500	9,500	9,000	7,500	9,500	9,000	
team leader	11,000	15,000	12,000	12,000	15,000	13,500	10,000	13,000	12,000	10,000	13,000	12,000	
manager	14,000	19,000	16,000	14,000	19,000	16,000	13,000	17,000	15,000	13,000	17,000	15,000	
Marketing Bids (proposals, co	ontent, language)												
junior specialist	5,300	7,000	6,300	7,500	8,500	8,000	5,500	6,500	6,000	5,500	6,500	6,000	
specialist	7,000	9,000	8,000	8,500	11,000	9,000	6,500	8,000	7,500	6,500	8,000	7,500	
senior specialist	9,000	11,000	9,500	11,000	13,000	11,500	8,000	10,000	9,000	8,000	10,000	9,000	
team leader	11,000	14,000	12,000	14,000	18,000	16,000	10,000	13,000	12,000	10,000	13,000	12,000	
manager	14,000	19,000	16,000	16,000	23,000	20,000	13,000	17,000	15,000	13,000	17,000	15,000	
Brand Marketing													
junior specialist	5,500	7,000	6,500	7,000	8,500	8,000	6,000	6,500	6,000	6,000	6,500	6,000	
specialist	7,000	9,000	8,500	9,000	11,000	10,000	6,500	8,000	7,500	6,500	8,000	7,500	
senior specialist	9,000	14,000	12,000	12,500	15,000	14,000	8,000	11,000	9,500	8,000	11,000	9,500	
team leader	13,000	15,000	13,000	14,000	16,000	15,000	11,000	14,000	13,000	11,000	14,000	13,000	
manager	15,000	19,000	17 000	15,000	20,000	18,000	14,000	18,000	16,000	14,000	18,000	16,000	



		Katowice			Łódź		Poznań			
		2024			2024			2024		
	min	max	NO	min	max	NO	min	max	NO	
Visual graphic										
junior specialist	5,200	6,500	5,800	5,300	6,000	5,500	5,000	6,000	5,500	
specialist	6,500	8,000	7,000	6,000	7,500	7,000	6,000	7,500	7,000	
senior specialist	8,000	10,500	9,500	7,500	9,500	8,500	7,500	9,500	9,000	
team leader	10,000	14,000	12,000	9,500	12,500	11,500	10,000	13,000	11,500	
manager	14,000	17,000	15,000	12,500	16,000	14,500	13,000	16,000	15,000	
Marketing Bids (proposals, conte	nt, language)									
junior specialist	5,200	6,800	6,000	5,500	6,500	6,000	6,000	6,500	6,000	
specialist	6,800	8,000	7,500	6,500	8,000	7,300	7,000	8,500	7,500	
senior specialist	8,000	10,500	9,500	8,000	10,000	9,000	8,500	10,000	9,500	
team leader	10,000	14,000	12,500	10,000	13,000	11,500	10,000	13,000	12,000	
manager	14,000	17,000	15,500	13,000	16,500	14,500	13,000	17,000	15,000	
Brand Marketing										
junior specialist	5,200	6,800	6,000	5,500	6,500	6,000	6,000	6,500	6,000	
specialist	6,800	8,000	7,500	6,500	8,000	7,500	7,000	8,500	7,500	
senior specialist	8,000	12,000	10,500	8,000	10,500	9,000	8,500	10,000	9,500	
team leader	12,000	15,000	13,000	10,500	14,000	12,000	11,000	14,000	13,000	
manager	15,000	18,000	16,500	13,000	17,000	15,000	14,000	17,000	15,500	



		Cracow		Warsaw			Wrocław			Gdańsk		
		2025			2025			2025		2025		
	min	max	NO	min	max	NO	min	max	NO	min	max	NO
Digital Marketing (e-commerce	e, SEO, SEM, onlin	e marketing, so	cial media, data a	nalysis)								
junior specialist	5 500	6,800	6 000	6,500	8,000	7,000	5,500	7,000	6,000	5,500	7,000	6,000
specialist	6,500	8,500	7 500	8,000	10,000	9,000	7,000	9,000	8,000	7,000	9,000	8,000
senior specialist	8,500	11,000	10,000	11,000	13,000	12,000	9,000	12,000	11,000	9,000	12,000	11,000
team leader	12,000	15,000	13 500	13,000	16,000	14,000	12,000	15,000	13,000	12,000	15,000	13,000
manager	15,000	18 000	17 000	15,000	19,000	17,500	15,000	18,000	16,500	15,000	18,000	17,000

		Katowice			Łódź		Poznań			
		2024			2024		2024			
	min	max	NO	min	max	NO	min	max	NO	
Digital Marketing (e-commerce	, SEO, SEM, online marketing	, social media, data a	analysis)							
junior specialist	5,200	6,800	6,000	5,500	7,000	6,200	6,000	7,000	6,500	
specialist	6,800	8,000	7,500	6,500	8,500	7,500	7,500	9,500	8,000	
senior specialist	8,000	12,000	11,000	8,000	11,500	9,500	9,500	12,500	11,000	
team leader	12,000	15,000	13,000	11,500	14,000	13,000	13,000	15,000	13,500	
manager	15,000	18,000	16,500	14,000	18,000	16,500	15,000	18,000	17,000	



Customer Service

## Top 3 most sought after positions in 2025:

- Customer Service Specialist with German
- Customer Service Specialist with French
- Customer Service Specialist with Scandinavian





#### **Customer Service**

		Cracow			Warsaw		Wrocław			Gdańsk		
		2025			2025			2025			2025	
	min	max	NO	min	max	NO	min	max	NO	min	max	NO
<b>Customer Service</b>												
junior specialist	5,300	6,800	6,000	6,000	7,000	6,500	6,000	6,500	6,000	6,000	6,500	6,000
specialist	7,000	8,500	7,500	7,500	8,500	8,000	6,500	8,000	7,000	6,500	8,000	7,000
senior specialist	8,500	10,500	9,000	8,500	11,000	9,500	8,000	11,000	9,000	8,000	11,000	9,000
team leader	11,000	15,000	12,500	12,000	15,000	13,500	12,000	16,000	12,500	12,000	16,000	12,000
manager	15,000	19,000	16,000	15,000	20,000	17,500	15,000	18,000	16,000	15,000	18,000	16,000
Order Management												
junior specialist	5,500	7,000	6,000	6,500	7,500	7,000	6,000	6,500	6,000	6,000	6,500	6,000
specialist	7,000	8,500	7,500	8,000	9,000	8,500	6,500	8,500	7,500	6,500	8,500	7,500
senior specialist	8,500	10,000	9,000	9,000	11,000	10,000	8,000	11,000	9,500	8,000	11,000	9,500
team leader	11,000	15,000	13,000	12,000	15,000	13,500	11,000	15,000	13,000	11,000	15,000	13,000
manager	15,000	18,000	16,000	15,000	20,000	18,000	15,000	20,000	18,000	16,000	20,000	18,000

		Kraków			Warszawa		Wrocław			
		2025			2025			2025		
	min	max	NO	min	max	NO	min	max	NO	
Customer Service										
junior specialist	5,200	6,500	5,800	5,500	6,500	5,800	6,000	6,500	6,000	
specialist	6,500	8,000	7,500	6,000	8,500	7,500	6,500	8,000	7,000	
senior specialist	8,000	10,500	9,000	8,000	10,000	8,500	8,000	10,500	9,000	
team leader	10,000	15,000	12,000	10,000	14,500	12,000	11,000	15,000	12,500	
manager	15,000	20,000	17,000	14,000	18,000	15,000	15,000	18,000	16,000	
Order Management										
junior specialist	5,500	6,500	6,000	5,500	6,500	6,000	6,000	6,500	6,000	
specialist	6,500	8,500	7,800	6,500	8,500	7,500	6,500	8,000	7,000	
senior specialist	8,500	11,000	10,000	8,000	10,500	8,500	8,000	10,500	9,000	
team leader	11,000	15,000	13,000	10,500	14,500	12,500	11,000	15,000	12,500	
manager	15,000	20,000	18,000	14,500	19,000	16,000	15,000	18,000	16,000	



## Office & Administration





#### Office & Administration

		Cracow			Warsaw			Wrocław			Gdańsk		
		2025		2025			2025			2025			
	min	max	NO	min	max	NO	min	max	NO	min	max	NO	
Receptionist	5,000	6,500	5,500	6,000	7,500	7,000	5,000	6,000	5,800	5,000	6,000	5,800	
Office Assistant	5,000	7,500	6,500	6,500	8,500	8,000	5,500	7,500	7,000	5,500	7,500	7,000	
Office Manager	8,000	12,000	10,000	9,000	11,000	10,000	8,500	12,000	10,500	8,500	12,000	10,500	
Executive Assistant	8,500	13,000	11,000	11,000	16,000	14,000	9,000	14,000	10,000	9,000	14,000	10,000	

		Katowice			Łódź			Poznań			
		2024			2024		2024				
	min	max	NO	min	max	NO	min	max	NO		
Receptionist	5,000	6,000	5,500	5,500	7,000	6,000	5,000	6,000	5,500		
Office Assistant	5,500	8,000	7,000	6,500	8,000	7,000	5,500	7,000	6,500		
Office Manager	8,000	11,000	10,000	8,500	11,000	10,000	8,500	11,000	10,000		
Executive Assistant	8,000	12,000	10,000	9,000	13,000	10,000	9,000	14,000	10,000		



# Supply Chain Management, Procurement

### Top 3 most sought after positions in 2025:

- Supply Chain Specialist/Senior Specialist
- Demand Planning Specialist
- Operational Buyer/Senior





		Cracow			Warsaw			Wrocław			Gdańsk		
		2025			2025			2025			2025		
	min	max	NO	min	max	NO	min	max	NO	min	max	NO	
Demand Planning													
junior specialist	5,500	7,500	6,500	8,500	11,000	10,000	6,000	7,500	6,500	6,000	7,500	6,500	
specialist	7,500	9,000	8,000	11,000	14,000	12,000	7,000	10,000	8,500	7,000	10,000	8,500	
senior specialist	9,000	11,000	10,000	15,000	19,000	18,000	10,000	12,000	11,000	10,000	12,000	11,000	
team leader	11,000	16,000	13,000	18,000	20,000	18,000	12,000	17,000	15,000	12,000	17,000	15,000	
manager	16,000	20,000	17,000	20,000	27,000	25,000	17,000	22,000	18,000	17,000	22,000	18,000	
Warehouse & Inventory Mana	agement												
junior specialist	5,500	6,500	6,000	5,500	6,500	6,000	5,500	6,500	5,500	5,500	6,500	5,500	
specialist	6,000	8,500	7,000	7,500	8,500	8,000	6,500	8,000	7,000	6,500	8,000	7,000	
senior specialist	8,000	11,500	9,500	9,000	11,000	10,000	8,000	11,000	9,000	8,000	11,000	9,000	
team leader	11,000	14,500	12,000	10,000	15,000	14,000	10,000	14,000	12,000	10,000	14,000	11,500	
manager	14,000	17,000	16,000	16,000	20,000	18,000	13,000	17,000	16,000	13,000	17,000	15,000	
Supply Planning													
junior specialist	5,000	6,500	6,000	6,500	7,500	7,000	5,500	7,000	6,000	5,500	7,000	6,000	
specialist	6,500	8,000	7,200	8,000	11,000	10,000	6,500	8,500	7,800	6,500	8,500	7,800	
senior specialist	8,000	11,500	10,000	11,000	15,000	14,000	8,500	11,000	10,000	8,500	11,000	10,000	
team leader	12,000	15,000	13,000	16,000	18,000	16,000	11,000	15,000	13,000	11,000	15,000	13,000	
manager	15,000	18,500	17,000	19,000	25,000	22,000	15,000	18,000	17,000	15,000	18,000	16,000	



		Katowice			Łódź			Poznań			
		2024			2024			2024			
	min	max	NO	min	max	NO	min	max	NO		
Demand Planning											
junior specialist	5,500	6,500	5,800	5,500	6,500	5,800	6,500	7,500	7,000		
specialist	6,500	8,500	7,800	6,500	8,000	7,500	7,500	11,000	9,000		
senior specialist	8,500	11,000	10,000	8,500	11,000	9,500	9,000	14,000	12,000		
team leader	11,000	15,000	13,000	11,000	13,000	12,000	14,000	17,000	15,000		
manager	15,000	18,000	16,500	13.000	17.000	15,000	17,000	22,000	20,000		
Warehouse & Inventory Management											
junior specialist	5,500	6,500	5,500	5,500	6,500	5,500	5,500	6,500	5,500		
specialist	6,000	8,000	7,000	6,500	7.500	7,000	6,500	7.500	7,000		
senior specialist	8,000	11,000	9,500	8,000	9,000	8,500	7,500	9,000	8,500		
team leader	11,000	14,000	12,000	9,500	12,000	11,000	9,000	13,000	11,000		
manager	14,000	17,000	16,000	12.000	16.000	13,000	13,000	16.000	15,000		
Supply Planning											
junior specialist	5,500	6,500	5,800	5,500	6,500	6,000	5,500	7,000	6,000		
specialist	6,500	8,500	7,800	7,000	9,000	8,000	7,000	8,500	8,000		
senior specialist	8,500	11,000	10,000	9,000	10,500	9,500	8,500	11,000	9,500		
team leader	11,000	15,000	13,000	10,500	12.000	11,000	11,000	14,000	12,000		
manager	15,000	18,000	17,000	13.000	16.000	14,000	14,000	17,000	15,000		



		Cracow			Warsaw			Wrocław			Gdańsk		
		2025			2025			2025			2025		
	min	max	NO	min	max	NO	min	max	NO	min	max	NO	
Transport Planning													
junior specialist	5,000	6,500	6,000	6,500	7,500	7,000	5,500	6,500	6,000	5,500	6,500	6,000	
specialist	6,000	8,500	7,000	8,000	11,000	10,000	6,500	8,000	7,000	6,500	8,000	7,000	
senior specialist	8,000	11,000	9,500	11,000	14,000	13,000	8,000	11,000	9,500	8,000	11,000	9,500	
team leader	11,000	15,000	12,500	15,000	17,000	16,000	11,000	15,000	12,000	11,000	15,000	12,000	
manager	15,000	18,000	16,500	18,000	23,000	21,000	15,000	17,000	16,000	15,000	17,000	16,000	
Operational Buyer													
junior specialist	5,500	6,500	6,000	6,000	7,500	6,500	5,500	7,000	6,000	5,500	7,000	6,000	
specialist	6,500	8,500	7,500	7,500	9,500	8,500	7,000	9,000	8,000	7,000	9,000	8,000	
senior specialist	8,500	12,000	11,000	9,000	12,500	11,000	9,000	12,000	10,000	9,000	12,000	10,000	
team leader	12,000	17,000	15,000	12,000	16,000	14,000	12,000	15,000	14,000	12,000	15,000	14,000	
manager	16,000	19,000	17,000	14,000	19,000	16,000	15,000	18,000	16,000	15,000	18,000	15,000	
Strategic Purchasing & Categ	ory Management												
junior specialist	6,500	8,000	7,000	8,500	10,000	9,000	7,000	8,000	7,500	7,000	8,000	7,500	
specialist	8,000	10,500	9,500	11,000	13,000	12,000	8,000	11,000	9,500	8,000	11,000	9,500	
senior specialist	10,000	14,000	13,000	13,000	17,000	15,000	11,000	15,000	14,000	11,000	15,000	14,000	
team leader	14,000	17,000	16,000	17,000	19,000	18,000	14,000	18,000	16,000	14,000	18,000	16,000	
manager	17,000	24,000	20,000	19,000	26,000	24,000	17,000	23,000	21,000	17,000	23,000	21,000	



		Katowice			Łódź			Poznań			
		2024			2024			2024			
	min	max	NO	min	max	NO	min	max	NO		
Transport Planning											
junior specialist	5,200	6,500	5,800	5,500	6,500	6,000	5,500	6,500	6,000		
specialist	6,500	8,000	7,000	6,500	8,000	7,500	6,500	8,000	7,000		
senior specialist	8,000	10,500	9,500	8,500	10,000	9,000	8,000	11,000	9,000		
team leader	11,000	15,000	12,000	11,000	13,000	12,000	11,000	14,000	12,000		
manager	15,000	17,000	16,000	13.000	16.000	14,000	14,000	17,000	15,000		
Operational Buyer											
junior specialist	5,500	6,500	5,800	5,500	6,500	6,000	5,500	7,000	6,000		
specialist	6,500	8,500	8,000	7,000	9,000	8,500	7,000	9,000	8,500		
senior specialist	8,500	12,000	10,000	9,000	11,000	10,000	9,000	12,000	10,000		
team leader	11,000	15,000	14,000	12,000	15,000	14,000	12,000	15,000	14,000		
manager	15,000	18,000	16,000	14,000	18,000	15,000	15,000	18,000	15,000		
Strategic Purchasing & Category Ma	anagement										
junior specialist	6,500	7,800	7,000	7,000	9,000	8,000	7,000	8,000	7,500		
specialist	7,800	10,000	9,500	9,000	11,000	10,000	8,000	11,000	9,000		
senior specialist	10,000	15,000	14,000	13,000	15,000	14,000	11,000	15,000	13,000		
team leader	14,000	16,000	15,000	16,000	19,000	17,500	14,000	18,000	16,000		
manager	16,000	24,000	20,000	19,000	24,000	22,000	17,000	23,000	21,000		



## Banking and Financial Services

### Top 3 most sought after positions in 2025:

- Anti-Money Laundering Senior / Specialist
- ESG Experts
- Credit Risk Analists / Senior





#### **Banking and Financial Services**

		All Poland							
		2025							
	min	max	NO						
Risk Control									
junior specialist	6,000	8,000	7,000						
specialist	8,000	12,000	11,000						
senior specialist	9,000	13,000	11,500						
team leader	12,000	16,000	14,000						
manager	14,000	20,000	17,000						
Model Validation Manager	25,000	40,000	35,000						
Risk Reporting Team Manager	16,000	30,000	25,000						
Regulatory & Compliance (incl. AML, K)	(C, CDD)								
junior specialist	5,500	8,000	7,000						
specialist	7,500	10,000	9,500						
senior specialist	9,000	14,000	12,500						
team leader	14,000	18,000	17,000						
manager	17,000	25,000	22,000						
Investment Reporting and Controlling									
junior specialist	7,500	9,500	8,500						
specialist	9,500	13,000	12,000						
senior specialist	12,500	15,000	14,000						
team leader	16,000	20,000	18,000						
manager	20,000	27,000	25,000						

		All Poland	
		2025	
	min	max	NO
Middle Office (incl. settlements, custody, co	orporate actions, c	ollateral managem	ent, transfer agency)
junior specialist	5,500	8,000	7,000
specialist	7,500	10,000	9,500
senior specialist	9,000	14,000	12,500
team leader	14,000	18,000	17,000
manager	17,000	25,000	22,000
Fund Accounting			
junior specialist	7,000	9,000	8,000
specialist	9,000	13,000	11,000
senior specialist	12,500	16,000	14,000
team leader	15,000	18,000	16,500
manager	19,000	25,000	23,000



Poland as an investment destination

# Polandas an investment destination





## Marek Łabaj

Business Manager



# Poland as an attractive investment market – key advantages and growth opportunities

Poland keeps holding onto its position as one of Central-Eastern Europe's important investment destinations. Despite many challenges, such as growing salaries and inflation, our economic stability, qualifications of Polish employees and support offered to new investors all remain key factors attracting foreign capital.

One of Poland's greatest advantages lies in the availability of highly qualified personnel. Poles distinguish themselves with high levels of education, especially in areas such as IT, engineering and finance. Proficiency in foreign languages further increases their competitiveness in the international market. Nevertheless, retaining a competitive advantage necessitates further investment in education and training. One ought to particularly focus on developing digital competencies and modern management. Taking into account ongoing changes to the global economy and growing competition from Asian markets, Poland must keep developing its cadres and infrastructure to stay in the lead.

In 2024, we observed a growing interest of foreign businesses in flexible forms of employment and cooperation. The need to adjust one's recruitment plans to the business environment and to increase market effectiveness through faster scaling of new businesses are both gaining greater importance in the highly competitive market.

Poland remains an attractive market for foreign investors, especially when it comes to sectors with high-added value, such as BPO/SSC, IT or engineering. However, to retain competitiveness, one needs to keep investing in the development of human capital and infrastructure supporting innovation and new technologies. It's also important to ensure legal stability and high quality of investor services, ultimately the safety of investments forms the deciding factor behind the choice to locate a foreign investment.



#### **Salaries**

Lower than the EU average by half.



#### Access to specialists

The largest increase in the number of students since many years, at 1.8%.



#### Worktime

The average factual work hours a week in the main place of employment greatly esceeds the EU average.



#### BSS as an employer

Over 87% of the respondents have rated the shared services sector to be an attractive employer.



#### **Increased employment**

Employment in the BSS sector keeps growing each year.



#### Investment support

In 2024, PAIH supported 25 investments in the BSS/R&D sector, which are expected to create 3,800 new workplaces.





# Investing in Poland — balancing costs and quality

Poland has been attracting investments from the Business Services Sector (BSS) for years, and one of the key advantages that position us as a regional leader in this area is the efficiency and productivity of human resources. While these attributes are difficult to capture in a reliable formula, they are, in fact, a crucial foundation for the sector's success. The Polish labor market is characterized by a dynamically developing, highly skilled workforce that demonstrates flexibility and ability to adapt to rapidly changing economic conditions. Such human resources are capable of offering excellent service quality across a wide range of sectors, from finance and HR to IT and business process management services.

The efficiency and productivity of human resources in Poland are particularly evident in the context of employees' language and technical skills. High proficiency in foreign languages, especially English, German, and French, enables seamless collaboration with clients from around the world, which, in turn, increases the competitiveness of Polish outsourcing companies. Polish employees are also able to quickly assimilate new technologies and processes, which is essential for maintaining high service quality in a dynamic environment. From the investors' perspective, these resources, often difficult to measure in traditional ways, represent immense added value and are one of the most important factors when making investment decisions.

# Radosław Pituch

Manager
Head of BSS & Tech
Investments
Direct Investments
Department





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#### **Cultural Proximity and Benefits for Investors**

The BSS sector in Poland is predominantly shaped by investments from companies from Western countries, particularly from the USA, the UK, Germany, and France. Cultural proximity, both at the language and organizational levels, plays a key role in fostering effective international cooperation. Polish employees often have a deep understanding of Western European market specifics, allowing them to better tailor services to the needs of foreign companies. This cultural understanding facilitates team integration, minimizes communication errors, and accelerates decision-making processes. For investors, this translates into lower operational costs, greater flexibility, and faster response times to changing market needs.



#### Local and Regional Investment Synergies

Poland is also becoming a central point in regional investment networks. Collaboration between local investments and international industrial projects, including large infrastructure investments, supports the development of the business services sector. Many companies investing in industrial projects, such as logistics centers, factories, or technology parks, are beginning to recognize the benefits of simultaneously investing in services that support their core operations, including BSS. This approach not only increases Poland's exposure to investments but also builds an investment context that supports further sector development. As a result of such synergies, local business clusters emerge, fostering innovation and creating favorable conditions for investment in various sectors, including IT, finance, and logistics.

At the regional level, Poland is gaining further significance as a service hub due to synergies with investments in neighboring countries. An example of this is the emerging "semiconductor valley" on the border between Germany, the Czech Republic, and Poland. In such cases, due to geographical proximity and strong investment linkages, Poland is able to attract additional investments and leverage existing resources for the development of modern business services.

#### Poland's Growing Role on the Global Stage

Poland's role on the international stage, both in geopolitical and economic terms, has significantly strengthened, particularly in light of the challenges related to the war in Ukraine. Poland has earned recognition as a key ally in the region, offering military, energy, and economic security. Its firm stance on the Ukrainian crisis, along with political and investment stability, has made Poland an increasingly attractive place for investments, including in the BSS sector. Furthermore, the development of energy infrastructure, including renewable energy and related technologies, strengthens Poland's position as a leader in modern business services. Security, in this context, is crucial for investors seeking stable markets for deploying capital.

In conclusion, Poland has a promising future in the field of modern business services. Local and regional synergies, as well as Poland's growing importance on the global stage (increased investment in defense, Poland's EU presidency), contribute to the further development of the BSS sector, which, due to high efficiency of human resources, cultural proximity, and investment attractiveness, remains one of the pillars of the Polish economy.



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Polish Investment and Trade Agency (PAIH) is a governmental institution promoting export, Polish economy and supporting foreign direct investments in Poland. In 2024, PAIH supported 25 investments in the BSS/R&D sector, expected to create 3,800 new workplaces.



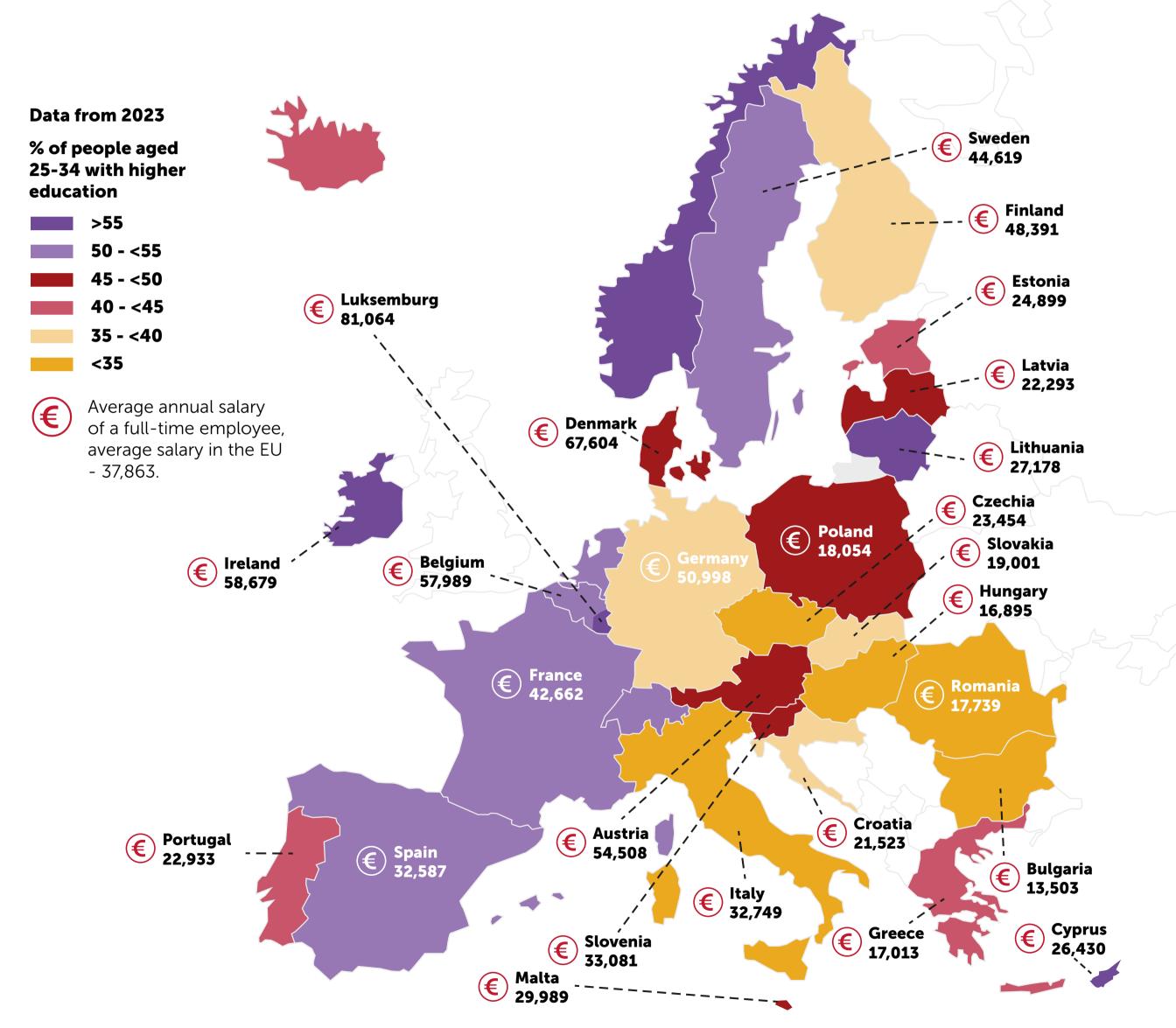
# An analysis of specialist salaries in Poland, in view of their education

For years, Poland has remained an attractive destination for foreign investors, offering access to a wide pool of qualified specialists, while retaining competitive salaries as compared to EU rates. Businesses investing in Poland can count not only on highly educated cadres and lower labor costs but also on a dynamically growing market and stable business infrastructure.

The average annual salary in Poland amounts to EUR 18,054, a little less than half of the EU average of EUR 37,863. While in comparison to lowest-paying states such as Romania, Greece, Hungary or Bulgaria the Polish market is looking less competitive in terms of labor costs, the difference isn't particularly stark (under EUR 1,200 for the former three states). However, Poland's major advantage lies in the high percentage of well-educated specialists – according to the International Standard Classification of Education (ISCED 2011), over 45% of people aged 25-34 have higher education.

Our country has always been known in the European market for its availability of highly qualified specialists in the accounting, finance, customer service, IT and technical support sectors. Poland distinguishes itself with a high proficiency in foreign languages utilized when servicing processes in these areas or the developing sectors – controlling, taxes, Al, Business Intelligence or EDG. The German language is in particularly high demand.

We observe increased levels of business process automation, supported by technological development and growing candidate preferences. Modern technologies are not only supporting operational effectiveness but also increasing Poland's attractiveness as a destination for investors seeking a destination for implementing advanced business services.







#### Olimpia Welenc

Project Manager



## Worktime in Poland

When compared to other European nations, Poles distinguish themselves in the number of weekly work hours. The statutory worktime is 40 hours a week, with Eurostat data showing that the factual number of hours spent on one's primary job equals 39.3. This makes us the sixth most hard-working nation in Europe.

This diligence of Poles is largely caused by high engagement and a sense of obligation toward one's employer and tasks. It is also influenced by socio-economic factors such as seeking financial stability or promotion. Poles are also less likely to work part-time, reflected by the aforementioned indicator.

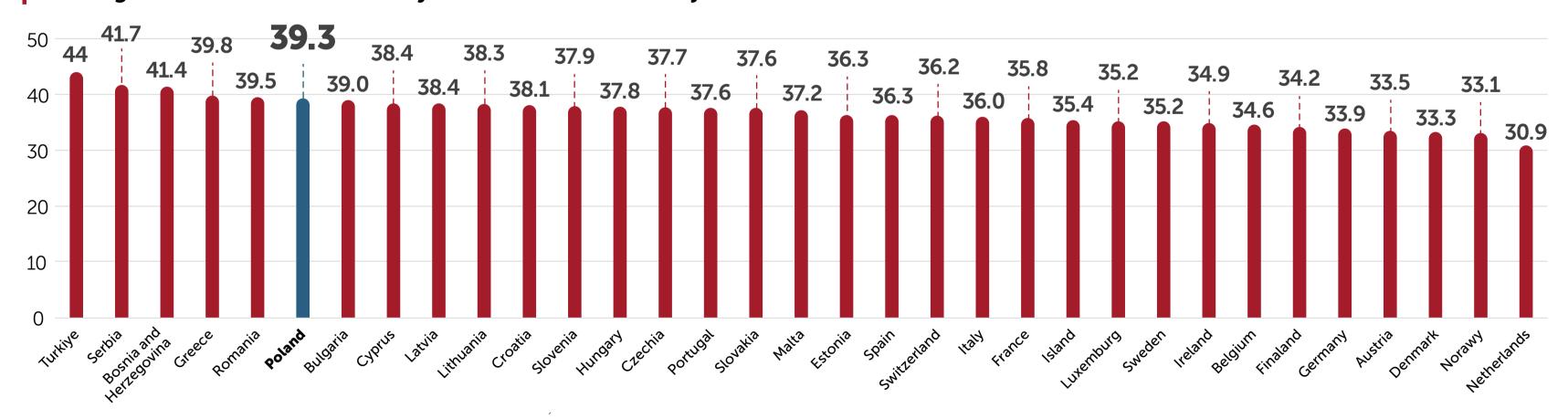
While we don't have issues with diligence and engagement, there is still room to grow in terms of work effectiveness. However, even this aspect is seeing notable improvements. According to Eurostat data, work efficiency in Poland has improved by 23% over the past decade.

Following the COVID-19 pandemic, Poland has greatly accelerated technological development and digitization, enabling even higher quality and efficiency of implemented tasks. The growth trend is holding strong – an increased number of businesses are optimizing and automating processes, utilizing Al-based solutions, perfecting their technological and software infrastructure, leading to greater productivity in the longer term.

Poland remains an attractive market for investors for reasons beyond the relatively low costs of labor, such as the growing quality of services and the ability to implement more advanced processes. The access to highly qualified personnel with a broad range of technical and language competencies forms another major advantage.

In the coming years, further investment in work-optimizing solutions and technology will prove necessary for the sake of effectively increasing the overall efficiency and maintaining competitiveness.

#### Average number of actual weekly hours of work in main job







#### Wojciech Skrudlik

GSK Poland Global Hub Lead



# How is it working in Poland? Polish diligence as compared to the EU

Building a competitive advantage through the diligence and creativity of Poles is an increasingly relevant topic, given constantly changing market expectations. As a nation, we have been long renowned for our diligence and the ability to solve even the most difficult problems. We can piece together even the most difficult puzzles and take care of problems from start to finish – which isn't a common ability. Therefore, it should be no surprise that we are considered a very resourceful nation.

Diligence has been Poland's exported national trait for many years now. Perhaps this is partially due to our complicated history – under socialist rule, with empty store shelves, one had to jump through many hoops to take care of their household's daily needs. However, I believe that a generational respect for labor plays a much greater role here. This is undoubtedly a major advantage compared to other nations.

Two sides of the same coin

Polish diligence, while very valuable, also has a darker side. We lead the rankings of most hard-working nations, exceeding the EU average by over 3 work hours a week. An excessive commitment to one's professional life can lead to faster burnout and heavy work-life imbalance. This is why the role of managers is so important nowadays: they ought to stay vigilant, watching over their teams and ensuring appropriate work-life balance.

Thankfully, one can observe a turn towards better balance thanks to the younger generations, who understand that overworking themselves could lead to negative consequences to their health and thus strive to find harmony between various spheres of life. The faster their senior colleagues, used to a very strong work ethic, open themselves up to the lessons from younger generations, the quicker we'll reach a healthy balance. We can observe this daily at GSK, which employs members of four different generations, all brought up in different circumstances yet working together, learning from each other, as well as sharing life and professional advice. Multigenerational teams form a powerful type of capital, allowing us to look at the future of Poland's economy with optimism.

Creative like a Pole

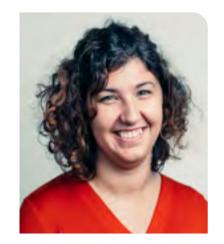
The second of the aforementioned traits distinguishing Poles in European and global job markets is their creativity. The ability to think outside the box and seek innovative solutions, while retaining high quality of work allows us to compete effectively in many industries. We have the kind of inquisitiveness that does not allow us to set aside unfinished work - we will plug away at a problem until it's solved. All of this contributes to the high effectiveness and competitiveness of businesses staffed by Poles and distinguishes us from other nations.

Diligence, resilience and creativity are Poland's national treasures. We ought to cultivate them and proudly showcase them abroad. However, we still are lacking when it comes to promoting a positive image. This is something we should all work on to become more visible and appreciated in European and global job markets.



## BSS — multiculturalism in the workplace





#### Aneta Maćkowiak

Group Marketing & Branding Manager



Poland's business services sector has rapidly evolved into a global hub, attracting talent from all over the world. The country's growing infrastructure, strong education system, and welcoming policies make creating multicultural workplaces easier than ever.

At our ROCKWOOL GBS center, we take great pride in our multicultural workforce. Our team of almost 600 talented professionals represents 16 nationalities and speaks 18 different languages, bringing unique perspectives and global expertise to each and every task.

Language skills offer a significant advantage. With 18 languages being spoken within the team, communication with international clients is seamless. This linguistic diversity not only facilitates smoother interactions but also supports building stronger relationships with clients from various regions.

The diverse backgrounds of employees encourage collaboration and teamwork. People bring their varied skills and experiences to the table, enhancing the overall problem-solving capabilities of the team. This collaborative spirit is a core part of our company's culture. With team members from 16 different nationalities, our company's culture became more inclusive. Employees learned to appreciate and respect diverse perspectives and traditions, fostering a sense of belonging for everyone.

Last but not least, the multicultural nature of the team instills a global mindset within the company. Employees are more aware of the global trends and market dynamics, which helps the company become more agile and responsive to changes in the international business environment. Additionally, a diverse team keeps bringing fresh ideas and perspectives, driving innovation.

In conclusion, multiculturalism in Poland's business shared services sector does not only enhance business performance, but also fosters a dynamic and inclusive culture in the workplace. The advantages provided by diverse teams, combined with the ease of creating multicultural workplaces, make Poland an attractive destination for multinational enterprises looking to thrive in the global market. Embracing multiculturalism isn't just about inclusion—it's a strategic advantage powering growth, creativity, and success in today's interconnected world.



## BSS — multiculturalism in the workplace





#### **Tim Oldenburg**

Country Manager



When I first arrived in Poland over 20 years ago, the country had yet to embrace its international potential. Back then, I was frequently hearing, "What's a German doing in Poland?!" I suppose I was an early trendsetter. At the time, Poland was still gearing up to join the European Union, and the presence of foreigners - whether students or workers - was quite limited.

Fast forward a few years and the landscape began to change dramatically. The rise of BPO and Shared Services sectors, coupled with improving living standards, made Poland an increasingly attractive destination for international talent. By the early 2010s, nearly 50,000 foreign students were registered in Polish universities. Today, that number has more than doubled, with over 100,000 foreign students enrolled.

Poland has transformed into one of Europe's leading business service hubs, attracting multinational corporations and skilled professionals from across the globe. This transformation ushered a wave of multiculturalism, which has become a hallmark of Poland's business services sector, bringing undeniable advantages and aligning seamlessly with the demands of an increasingly globalized world.

A cornerstone of this multicultural success is the widespread use of English within the sector. With many roles supporting international markets, English has become the standard language, enabling foreign talent to integrate more easily.

Poland's central location and EU membership further boost its appeal, making it a magnet for talent from across Europe.

As a result, Polish cities have evolved into vibrant cultural melting pots, reflecting the diversity of the people who now call them home. This shift has naturally fostered multiculturalism in the business services sector, mirroring the broader transformation of the country itself.

The benefits of this diversity are both immediate and profound. Employees with varied linguistic skills and cultural insights can elevate customer interactions, reducing misunderstandings and strengthening client relationships. Diverse teams, with their broad range of perspectives, experiences and problem-solving styles, often produce more innovative solutions - an invaluable asset for shared service centers managing complex global operations. Multicultural teams are uniquely equipped to tackle challenges from multiple angles, driving both efficiency and creativity.

In summary, multiculturalism in Poland's business services sector delivers a wealth of advantages: fostering innovation, enhancing client service, and bolstering employer branding. In an era where AI increasingly disrupts transactional roles, Poland's ability to offer exceptional global customer experiences through its diverse talent pool may prove to be its defining strength for years to come.



## BSS — multiculturalism in the workplace





#### **Alvaro Santos**

Vice President, Global Finance Shared Services



I'm a Portuguese professional who has lived in Poland for the past 15 years. My career has focused on centralized development and management of Shared Service Centers (SSCs). During this time, I have had the privilege of working across various industries, including manufacturing, oil and gas, pharmaceuticals, real estate, and IT services. This diverse experience has equipped me with valuable insights into the dynamic and innovative landscape of Poland's business services sector.

Poland's business services sector thrives on its impressive educational foundation. Each year, the country educates over 1.2 million students, particularly in high-demand fields like business, IT, and engineering. Approximately 90% of young professionals are proficient in at least one foreign language, making them highly desirable in the global job market. The robust talent pool has been instrumental in the success of SSCs, which employ over 435,000 people nationwide. At our Strategy SSC in Warsaw, we witness each day how this well-educated, multilingual workforce promotes collaboration and innovation, addressing complex challenges with efficiency.

This dynamic environment is further enriched by Poland's commitment to diversity. With employees representing over 50 nationalities, multicultural teams not only drive innovation but also enhance problem-solving capabilities. This inclusivity has contributed to the sector's consistent growth, with an 8% annual increase in SSC employment highlighting Poland's attractiveness to global enterprises. Such diversity also positions the companies to better adapt to economic fluctuations and secure their competitive edge.

However, as salaries in Poland are rising, retaining and nurturing multicultural teams becomes crucial. Research indicates that companies with diverse teams are 36% more likely to outperform their peers in profitability.\* Diversity fosters innovation, enabling businesses to excel in a globalized market. By embracing diversity as a strategic advantage, companies operating in Poland can achieve sustainable growth, attract international clients, and build resilience against economic challenges.

Ultimately, Poland's inclusive and innovative approach solidifies its position as a leader in the global business services landscape. By fostering a multicultural workforce and creating opportunities for business growth, the country provides a unique platform for professionals and companies alike. For individuals like me, Poland represents not only a space for career development but also a vibrant and enriching professional environment.



<sup>\*</sup> Research by McKinsey & Company from their 2019 report: "Diversity Wins: How Inclusion Matters".



#### Weronika Sadowska

Delivery Director
BPO & RPO Solutions



# Multiculturalism in Polish shared services centers

A work culture based on the cooperation of people from many different countries is bringing many advantages to organizations and their employees alike. While building multinational teams comes with a number of challenges, the example of Poland's BSS market proves they are challenges worth tackling. Our national flexibility helps foreigners adapt and the openness for talent from across the world strengthens our competitive advantage in an unstable economic environment.

I'm responsible for building outsourcing projects at Grafton Recruitment and each day I see that multinational teams are gaining importance in the dynamically changing job market. Our clients include a US company employing thousands of translators, including almost 300 Poles, working with 14 different languages including Portuguese, French, Russian, Czech, Slovak, Vietnamese, Dari, Urdu or Armenian.

Said client is active in numerous markets, with the vast majority of their translator comprising foreigners. Its demand for talent is growing and now encompasses people not only fluent in foreign languages but also understanding local dialects, cultures and customs. A diverse team helps understand the needs of international clients, improving customer service and supporting expansion to new markets.

#### The benefits of diversity

One of the key advantages of multicultural teams is their diverse set of experiences. The various modes of thought brought to the organization allow the group to consider issues from different perspectives and as a result be more effective in problem-solving. The intersection of diverse experiences births the exchange of ideas, bolstering creativity – it allows us to discover new trends and create innovative solutions. Innovation is of particular importance when it comes to multiculturalism, as it helps Polish BSS companies compete more effectively in the global market.

It also bears mentioning that a multicultural team provides greater awareness of global processes, enabling the creation of more complex and effective strategies. Furthermore, my own experiences suggest that an international work environment supports tolerance and openness and thus a better work atmosphere.



#### Challenges exceeding the HR

Among challenges related to the creation of multicultural teams, the inability to communicate in a native language takes center stage. Even when a team is fluent in English, it is still ultimately communication in a foreign language, at increased risk of misunderstandings. Some regions of the world have entirely different norms in terms of what is acceptable and what isn't. For a person unfamiliar with them, it's easy to offend a coworker even with a simple gesture. Each new member of a multinational team brings their own customs that must be respected. In some cultures, it might mean praying at certain times of the day or fasting during Lent.

Managers and HR departments should be aware of these challenges. An important aspect of effectively managing multicultural teams is cultivating respect for otherness. Working in such a team requires openness to differences and the ability to conduct a dialogue. It also bears mentioning that not all employees will feel equally comfortable in such an environment. Therefore, it's worth promoting positive aspects of multiculturalism through international programs or training helping employees understand and accept differences.

#### Poles without prejudice

The phenomenon of multiculturalism is sometimes criticized as dangerous and such concerns often arise from unfamiliarity with other cultures or bad past experiences. It is therefore important for the employee integration process to overcome stereotypes concerning various nations – even the simplest ones, such as all Italians being loud. Polish managers are great at this and businesses investing in developing shared services centers admit that Poles find it exceptionally easy to work in multinational projects and teams. Decades of economic migration have made us more open because we are aware of how difficult it is to adapt to a foreign country. Almost every Pole either worked abroad or knows a person who did so. As a result, they can see themselves or their friends in a foreigner, spurring a natural drive to help them.

Multiculturalism is an important advantage of the Polish BSS industry, distinguishing it internationally. Utilization of diverse teams greatly improves the sector's innovativeness, effectiveness and adaptability to the ever-shifting markets. However, the sensitivity to differences and the ability to build relations based on mutual respect and understanding is key to success.



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# Multiculturalism from employee perspective



Morteza Adabifirouzjah

Translator

My name is Morteza Adabifirouzjah. I work as an interpreter at Language Line Solutions.

I work remotely from Poland and me experience doing so has been positive. Although I haven't had many direct interactions with colleagues here, I've observed that their work culture is highly professional, with a strong focus on efficiency and results.

The processes and systems are well-organized, which helps maintain smooth collaboration even from afar. The work conditions here are conducive to productivity, striking a balance between flexibility and setting clear expectations. Overall, I've found it to be an excellent environment to work in.



Beni-Gloria Mateka

Translator

I have lived in Poland for 2 years now, first finishing my Master's Degree in International Business Management at WSB Merito Gdańsk and then landing my first job at Grafton. As my first job, it turned out to be an amazing experience where the staff was very efficient and respectful and always ready to help when I needed something, such as explaining some documents. It has been such a good experience because of the knowledge that I can count on them and feel safe to ask for anything, knowing that they will listen and advise me to the best of their ability.

When it comes to living with Poles, what I like about them is how they respect the foreigners. Even with the language barriers, I have never had a bad experience and they are always eager to provide directions or help in other ways. I fondly remember a lady that helped me get to the other side of a train station when she found out I was at a wrong platform. These small gestures are making the life in Poland much more pleasant. We feel accepted and the Poles have been nice, helpful and respectful. I'm considering learning the language so we can have more conversations.



**Dolores Vunda** 

Translator

My name is Dolores. I came to Poland from Congo (Kinshasa) as a student but found myself staying here for good. Working in Poland has been quite a journey for me, as it's here that my adventure with corporate work has begun. It took a lot of learning, but so far, it's been working out rather well for me. From a broader viewpoint, Poland is still finding its way of dealing with foreigners. I remember that when I got here 8 years ago, there were not nearly as many foreigners here as today. Nowadays, there's still some work to do but I nevertheless I greatly appreciate the progress so far. Working with Poles has had its difficulties due to differing perspectives and values at work, but it has helped me change perspective and make some good friends. As is the case with any other nation, individual people can differ greatly. Some are approachable and pleasant to work with, others less so. But overall, my personal experience with working with Poles has been fairly good. If I were to evaluate the teamwork and conditions at work, I would definitely say that they're great! As someone who really enjoys traveling, I was able to compare different work cultures in various countries and I have to say that Poland has really great work values.





#### Jan Banasikowski

Director Advisory
& Transaction Services



## Office real estate in Poland

We're entering an interesting year for the modern business services sector, creating many new business and cooperation opportunities. The industry is facing many challenges, such as the development of AI-based technologies, difficult geopolitical situation, the growing competition of other countries driven by the constant need to optimize costs or changing work models and environments. These all have an impact on the business effectiveness of operations working in Poland.

Given the likelihood of upcoming economic recovery, we are increasingly often considering the chances various cities in Poland have to attract new investment and further develop pre-existing businesses. Poland's attractiveness is no longer related primarily to lower operational costs. Despite strong competition from India, North Africa, Latin America or European states such as Portugal or Romania, we remain highly competitive, especially when it comes to the quality of servicing business processes and can attract investors thanks to the scope, experience and maturity of our market.

Poland's major advantage lies in the office real estate market. When compared to many cities in (Western) Europe or Asia (eg. India), we offer a broad offer of modern office spaces (at 13.1 mln m2) in high-standard and central locations, providing access to extensive transportation and urban infrastructure at competitive prices (14-17 EUR/m2 in regional cities, approx. 20 EUR/m2 in Warsaw). Furthermore, Poland offers choice and variety in the form of access to 9 well-developed office markets (Warsaw and 8 regional cities). It bears mentioning the dynamics of office real estate markets in regional cities (6.8 mln m2) as compared to the capital (6.3 mln m2), as observed by the end of 2024.

At the location analysis stage, foreign investors appreciate stable and common access to IT infrastructure, convenient public transportation or a high quality of life, which all factor into the expectations of employers.

The development of the Polish office real estate market is largely connected to current trends, such as the growing popularity of hybrid work. According to CBRE research and the "European Office Occupier Sentiment Survey 2024" report, 61% of businesses only utilize 41-80% of their office space, marking an increase from 2023 when this value amounted to 48%. A third of all organizations plan to increase employee presence in the offices and 75% of companies have already introduced appropriate policies in this regard, even though approx. Half of them are merely recommendations. One could expect the trend of returning to offices to grow throughout 2025.

In the context of the Polish market's competitiveness and attractiveness for BSS companies, it also bears highlighting one more issue. Increasingly often, we can observe that the risk of simpler processes outflowing to cheaper countries isn't necessarily considered a challenge for local organizations. Oftentimes, it's a conscious part of one's business development strategy of moving toward servicing increasingly advanced processes. Servicing simple tasks also ceases to be attractive to employees, who seek challenges and growth opportunities in their daily work. In this context, the development of AI technologies also isn't considered a challenge – it doesn't have to mean an outflow of business processes. To the contrary, technology is becoming an intrinsic element of support processes, improving the quality of servicing advanced processes, helping attract new investors seeking a destination for more complex services. In summary, 2025 is bringing many opportunities for growth and attracting new foreign investments to help develop Poland's modern business services sector for its employers, employees and tenants alike.



Research into BSS sector employees

# Research into BSS sector employees



## Overview of the research

The numerous contradictory opinions on the BSS sector were an impulse to carry out our research. One one hand, many claim that the sector is currently stabilizing, yet on the other hand some say it is stagnant and developing slower than anytime before.

Our research focused on three key aspects:

- How attractive is the sector as a workplace according to employees?
- Do they have a sense of employment stability?
- Which processes do they consider most promising?

In addition, we investigated the issue of remote work, both in comparison to other utilized work modes and employee preferences.

The BSS employee survey was carried out in January 2025 (n=103).

Research was carried out utilizing the CATI method. The results were compiled by Grafton Recruitment.

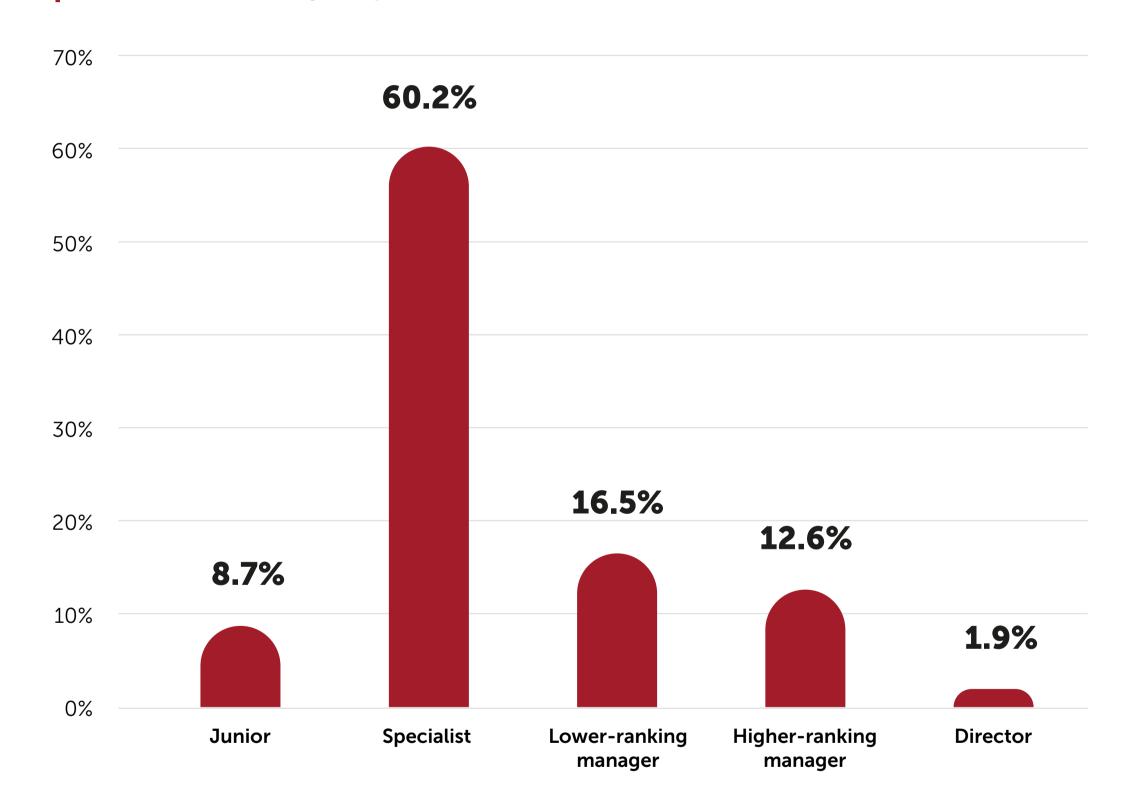
#### We worked with the following assumptions:

- **1.** In the BSS sector, similar to other industries analyzed by Grafton Recruitment (e.g. IT, industry), employees are afraid of losing their jobs.
- 2. Processes requiring the most knowledge and specialist competencies are considered the most promising.
- **3.** Employees have largely returned to stationary work.
- **4.** Pay raises in the BSS sector for most positions do not exceed 10%.

#### Respondents

The research encompassed shared business center employees, of whom a majority (60.2%) occupies specialist positions.

#### Select the rank of your position





# Key conclusions



#### BSS as an employer

Over 87% of respondents consider the shared services sector to be an attractive employer.



#### **Business Intelligence**

36.9% of respondents consider Business Intelligence processes to be the most promising.



#### 0 respondents

Not a single respondent declared working in a fully stationary mode.



#### Top 1 – Salaries

Surveyed employees consider the salaries to be the most important aspect of their work.



5%-10%

Sector's employees could expect pay raises of 5-10%.



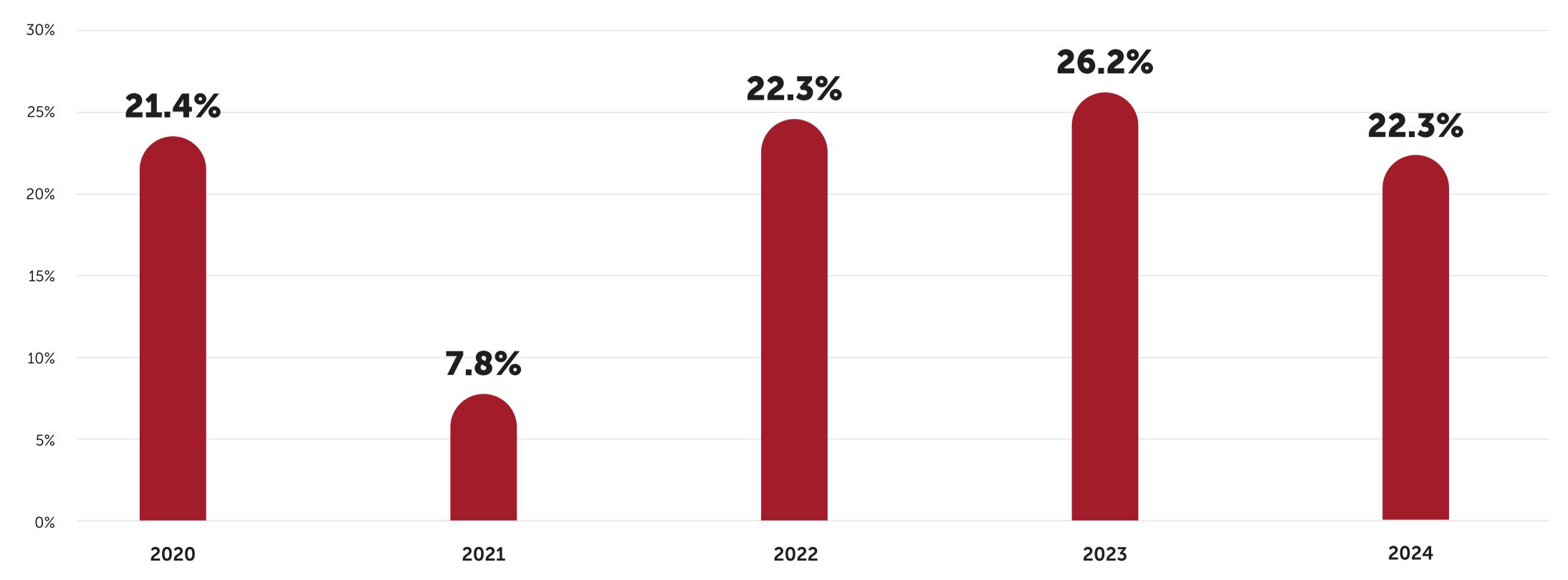
# Which year was the best for the BSS sector?

2023 was deemed to be the single best year in the 2020-2024 period. This opinion might have been shaped by several factors. The industry has shown resilience to market upheavals, which proved especially important given the crisis that affected the IT sector.

Furthermore, despite the number of new vacancies shrinking as compared to the previous years – causing a lower turnover – organizations turned toward more intense focus on their employees. The experiences of the pandemic and the post-pandemic period have made businesses pay greater care toward the well-being of their teams.

2021 received the worst ratings. It was made difficult because of the pandemic and its effects on the job market and economy at large. The remaining years were rated very similarly.

#### Which of the following years do you consider to have been the best for the BSS industry?





# Stability of employment and attractiveness of work

BSS sector owes its image as an attractive employer to several factors. The most important of them is the stability and resilience to crises, improving the sense of professional security. When compared to other industries, such as IT, there are far less mass layoffs, leading to the perception of work in BSS as more stable.

Despite Poland's mature market seeing elimination of simpler processes in the BSS centers, some employment reductions as well as BSS centers being opened or expanded at a slower rate than in the previous years, most employees in the sector still consider their employment to be stable.

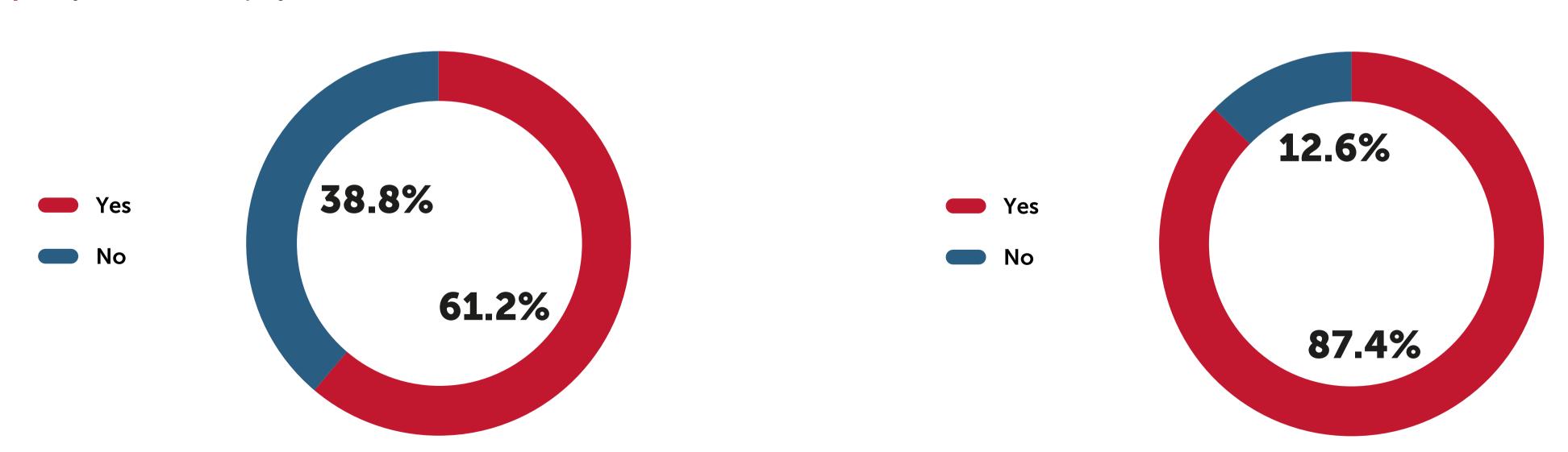
The employees can count on stable employment terms, attractive salaries, bonuses and additional benefits such as private healthcare, life insurance, sports cards or well-being programs. The Industry also distinguishes itself with clear career paths and and care for employee growth, expressed through numerous trainings letting them hone their skills and reach promotion within company structures.

The BSS sector can also offer great flexibility in terms of work modes – many businesses allow for working under the hybrid model, with some also providing opportunities for fully remote employment.

Organizations internal culture is playing an increasing role in attracting and retaining talent. BSS companies are partaking in pro-social and ecological activities, in alignment with ESG principles, promoting diversity and inclusivity. Open communication and readiness to receive feedback give employees a sense of having a bonafide impact on the organization's further development. All of these aspects contribute to BSS sector's reputation as an attractive professional choice.





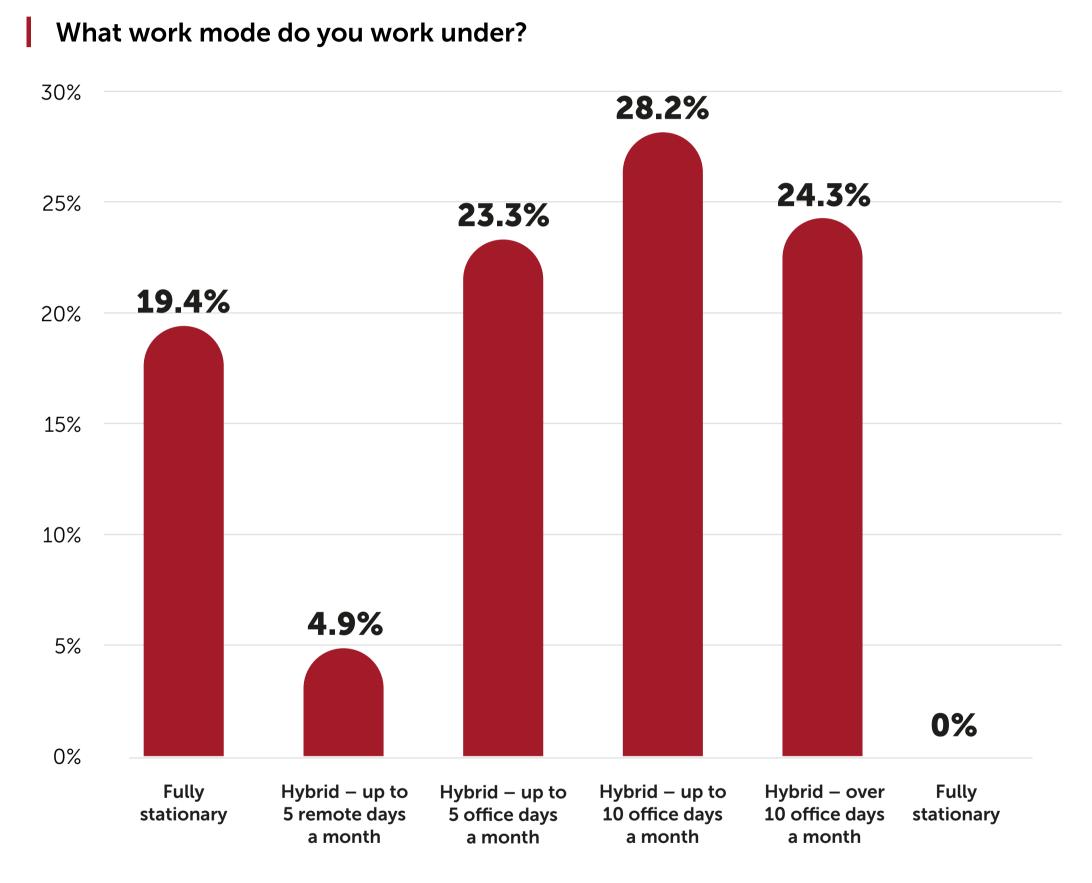


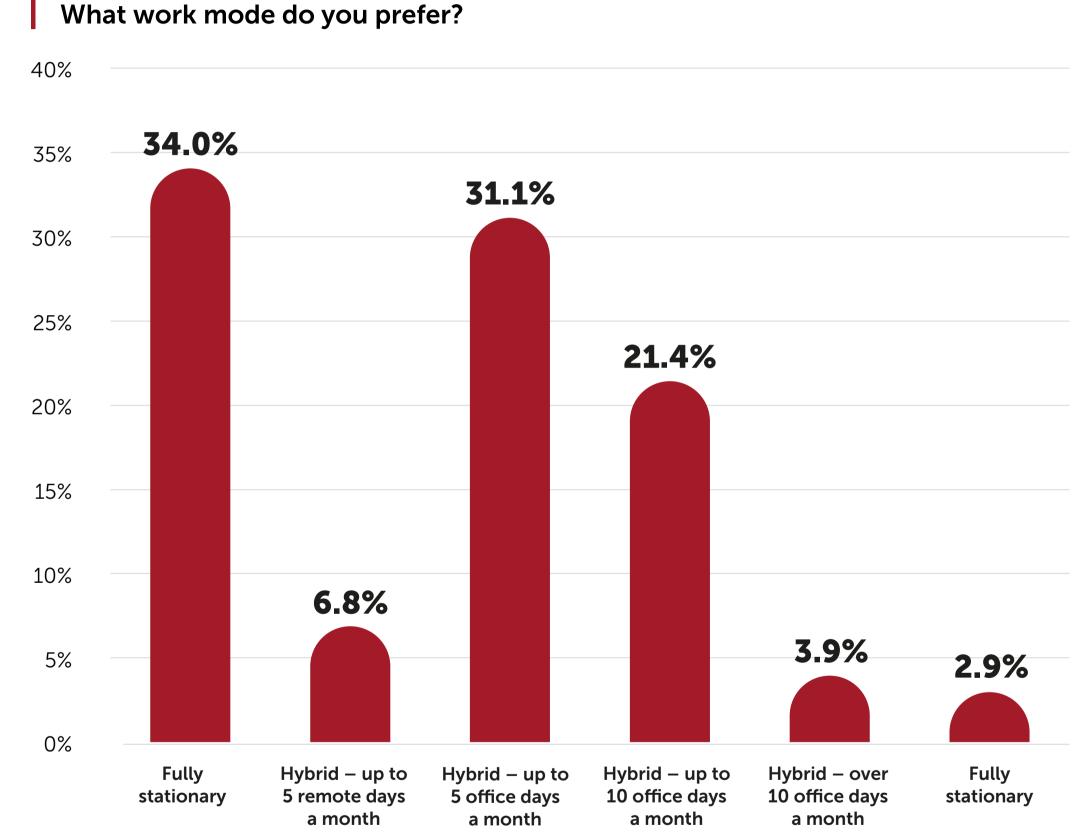


# Work mode and employee preferences

Not a single of the surveyed BSS employees declared working under a fully stationary mode, while almost 20% work entirely remotely. At the same time, 34% of respondents expressed preference for remote work, making it the most desired of all work modes.

These results show that remote work, popularized during the pandemic has had a lasting impact on the realities of the BSS industry. However, fully remote work isn't a currently considered a standard – the hybrid model combining the flexibility of work from home with regular office attendance has become dominant.







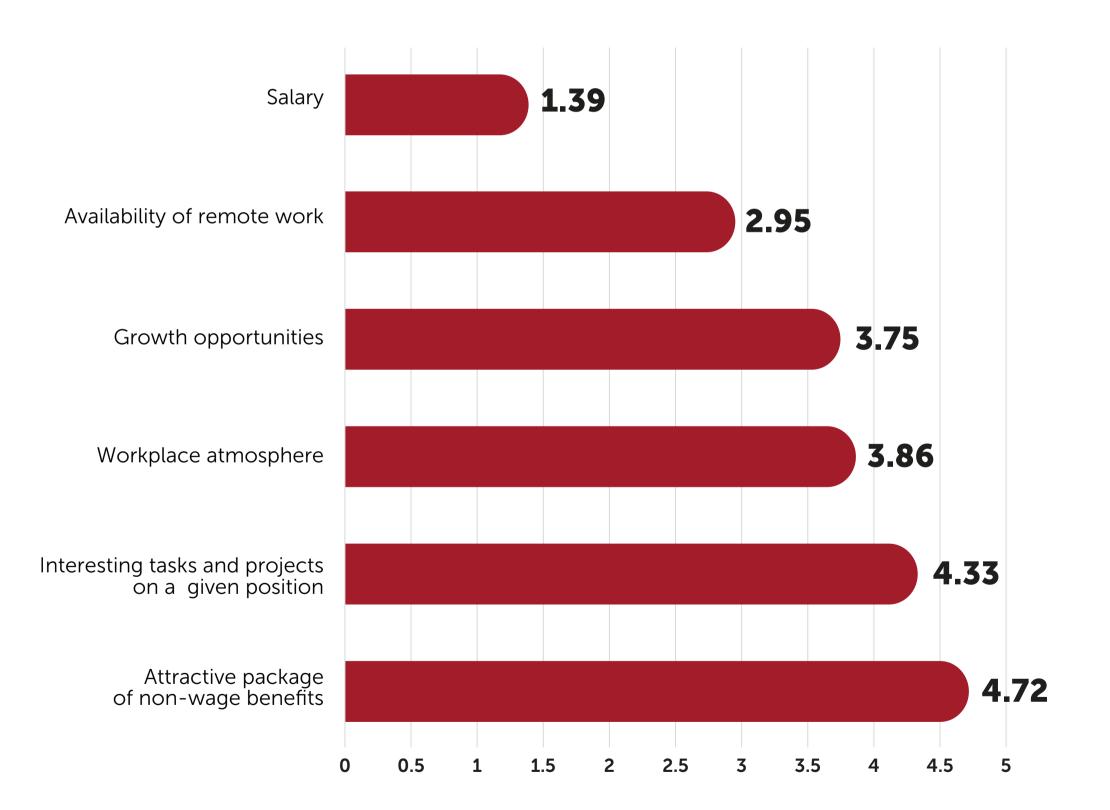
# Salary raises and the most important aspects of work

Much like in our previous research concerning 2023 – and all analyzed industries – the salary remains the single most important factor for the surveyed BSS employees.

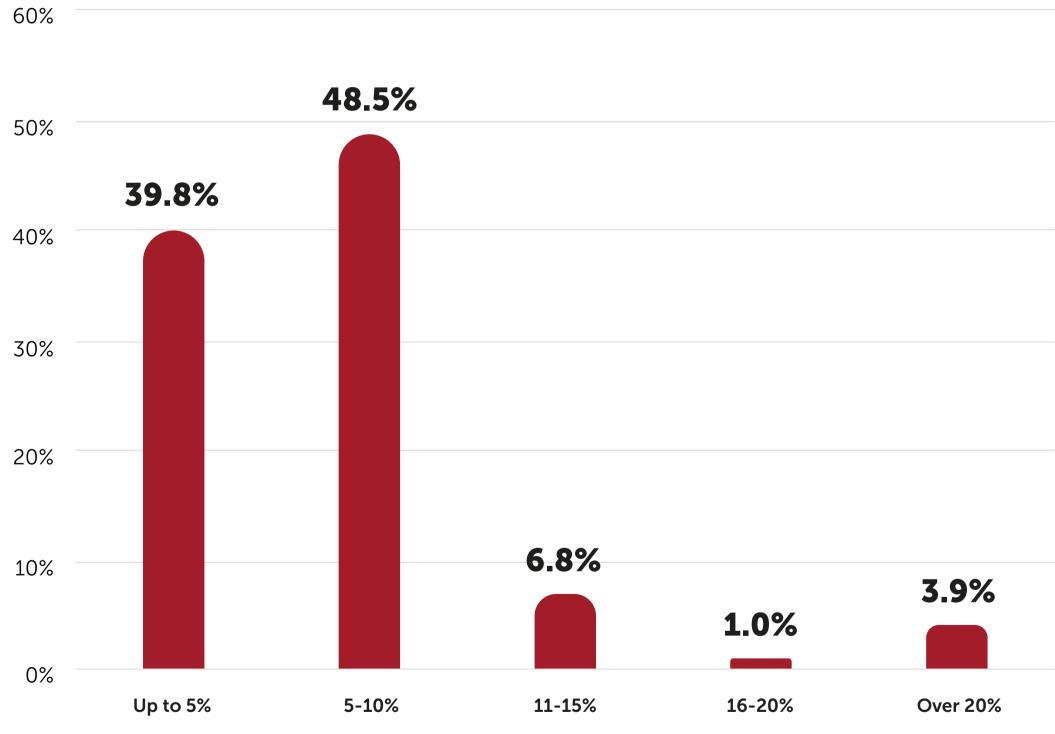
The hierarchy of work-related priorities has likewise remained unchanged: the ability to work remotely remained in second place, confirming the key role of this work mode when choosing one's employment and its sustained importance going into the future.

When it comes to salary increases, almost half of all respondents received a pay raise of 5-10%. People receiving less than 5% increase comprised less of 40% of the answers. Pay raises exceeding 10% accounted for slightly more than 10% of all respondents.

#### What's most important for you at work? \*



### What (percentage-based) pay raise could you expect during your employment in BSS industry?





<sup>\*</sup> The average order, on a scale of 1-6 of each aspect for all surveyed employees.

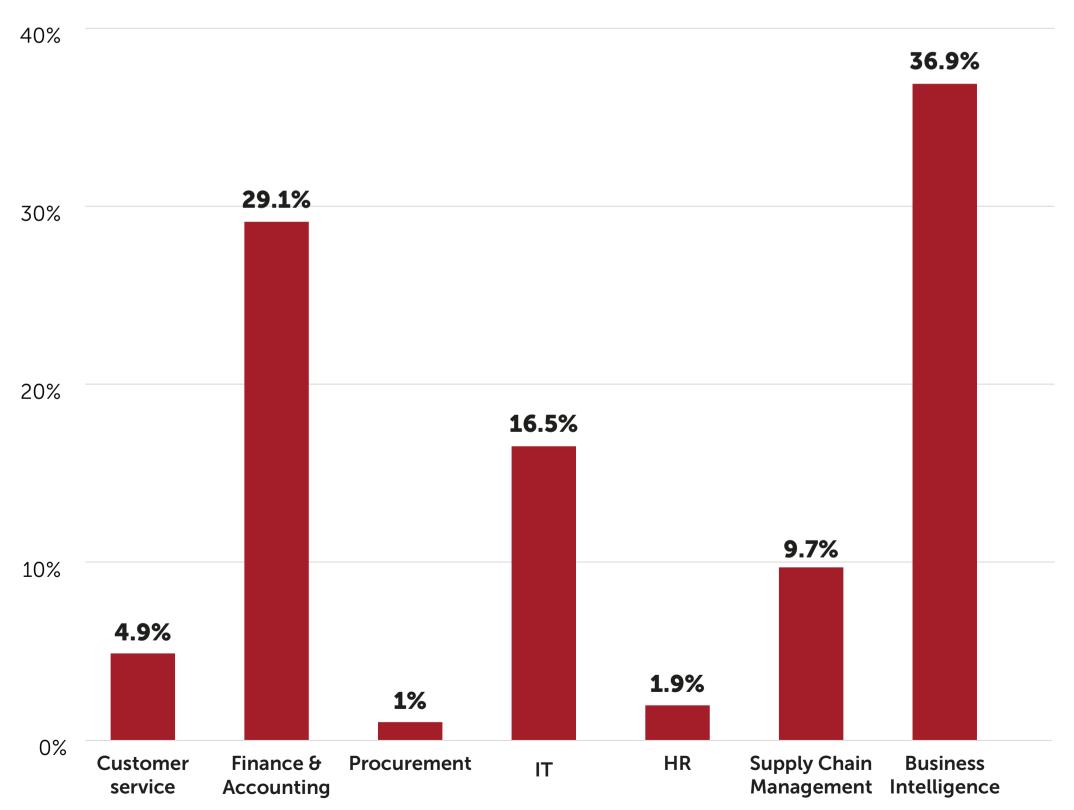
# Processes and languages of the future

Processes concerning Business Intelligence are steadily gaining importance – as declared by 36.9% of respondents.

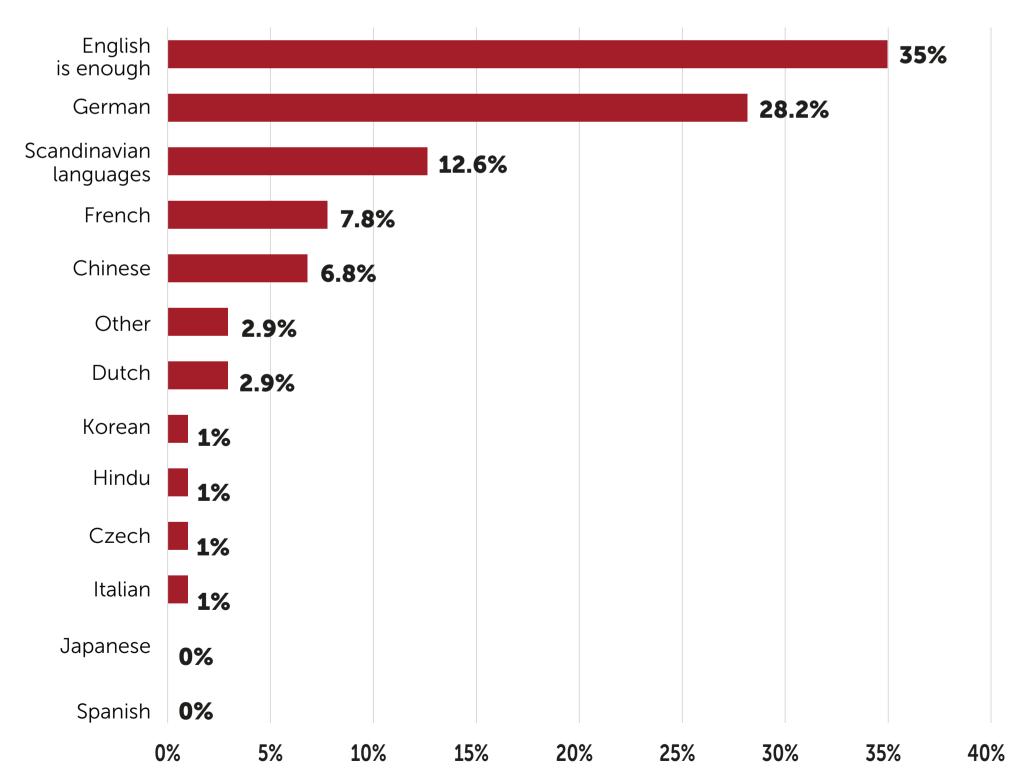
Finance and accounting, highlighted by 29.1% of respondents also have had a major development potential, suggesting that the demand for specialists in these areas remains high. 16.9% of respondents considers IT processes to be crucial for the sector's future outlooks.

English language remains a key working language in the BSS sector, with 35% of respondents claiming that proficiency in English will retain its greatest impact on the salary levels. From the viewpoint of salary bonuses, German will also remain quite promising, as seemingly confirmed by the high demand for German-speaking specialists, especially in the areas of customer service and accounting. Familiarity with Scandinavian languages might also prove advantageous, even though the current demand, as observed through job offers, is relatively low. French and Chinese are subsequent languages, which – according to BSS workers – might lead to higher pay in the future. However, while the demand for French-speaking candidates is visible among the job offers, Asian languages remain fairly niche.

#### Which BSS processes do you consider most promising?



## Proficiency in which language will have the most positive impact on one's salary in 2025?





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Make hiring decisions taking into account candidate's aptitude, skills and potential. Your new employee will prove the right person in the right place.



# Effective onboarding?

Learn about candidate strengths, limitations and preferences as soon as during the job interview. Retain new employees in your company!



# Building teams?

Build awareness and trust, increase diversity and integration within your company.



#### Hybrid work?

Give your managers the tools and tips necessary for effective management of people regardless of their physical location.



# Where to obtain the best leaders from?

Find, develop and promote the most prospective employees. **Build individual** career paths, increase involvement.



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We offer the quality and standards of Executive Search boutique, combined with the swift efficiency and dynamic pace of tailored solutions.

#### **Our Specializations**

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- Human Resources
- Sales & Marketing
- Digital & E-commerce
- Information Technology
- Manufacturing & Supply Chain
- Real Estate
- Construction & Energy

#### **Quarterly we recruit**

- 1 CFC
- 2 GMs / MDs9
- 9 Board Members \ Directors
- 17 Managers \ Senior Experts

#### **BSS from Wyser**

Entrusting Wyser Executive Search with leadership recruitment ensures a professional approach, access to top talent, and process optimization, ultimately leading to the selection of leaders capable of effectively managing and driving long-term organizational growth.

# Positions we are recruiting for

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- Operations Director / Manager
- Head of Finance (SSC/GBS/CoE)
- Global Process Owner (e.g. PTP, OTC, RTR)
- Transformation Manager





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