

2020 REPORT INSIGHTS

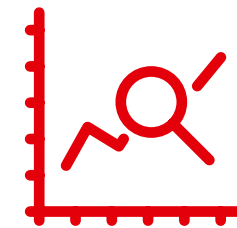


SIGNIFICANCE OF THE SECTOR IN THE ECONOMY OF POLAND



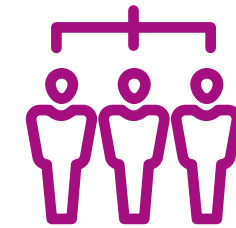
3.0-3.5%

share of the sector
in GDP of Poland
and growing



5.2%

share of the
sector in the total
employment by firms



338,000

jobs created

608,000

including the indirect
and induced effects



\$19.8 billion

value of exports
of business services
in 2019 from Poland

NEW INVESTMENTS

74

New centers
created since
2019

31,000

New jobs
created since
2019

10.1%
yoy increase

85

Number
of new jobs
created
per day in the
sector in 2019

1,513

Service
centers active
in Poland
in the end
of Q1 2020

970

Number
of investors
with their
service centers
in Poland

A SECTOR WITH TRULY INTERNATIONAL DIMENSION

71%

of centers
foreign-owned

43

Number of countries
of origin

82%

Share of employment
in foreign centers
in Poland

95

Number of investors
from the Fortune
Global 500 list with
service centers
in Poland

MAJOR COMPETITIVE ADVANTAGES



**Large
talent pool**



**Time overlap with clients
geographical proximity**



**Cultural / cognitive
proximity**



**Knowledge of foreign
languages**



**Creativity
of employees**



**Mature
office market**

OFFICE MARKET

11,000,000 sq m

Total resources of modern office space in Poland.
The largest office market in CEE.

1,700,000 sq m

Office space being currently built

9

Developed office markets in Poland

Flex workspaces

One of the hottest trends

Green office

Growing popularity of sustainable solutions

LOCATION OF ACTIVITIES



50

Number of cities in which modern business services centers are located in Poland



17

Number of cities in which the employment in the sector amounts to at least 1,000



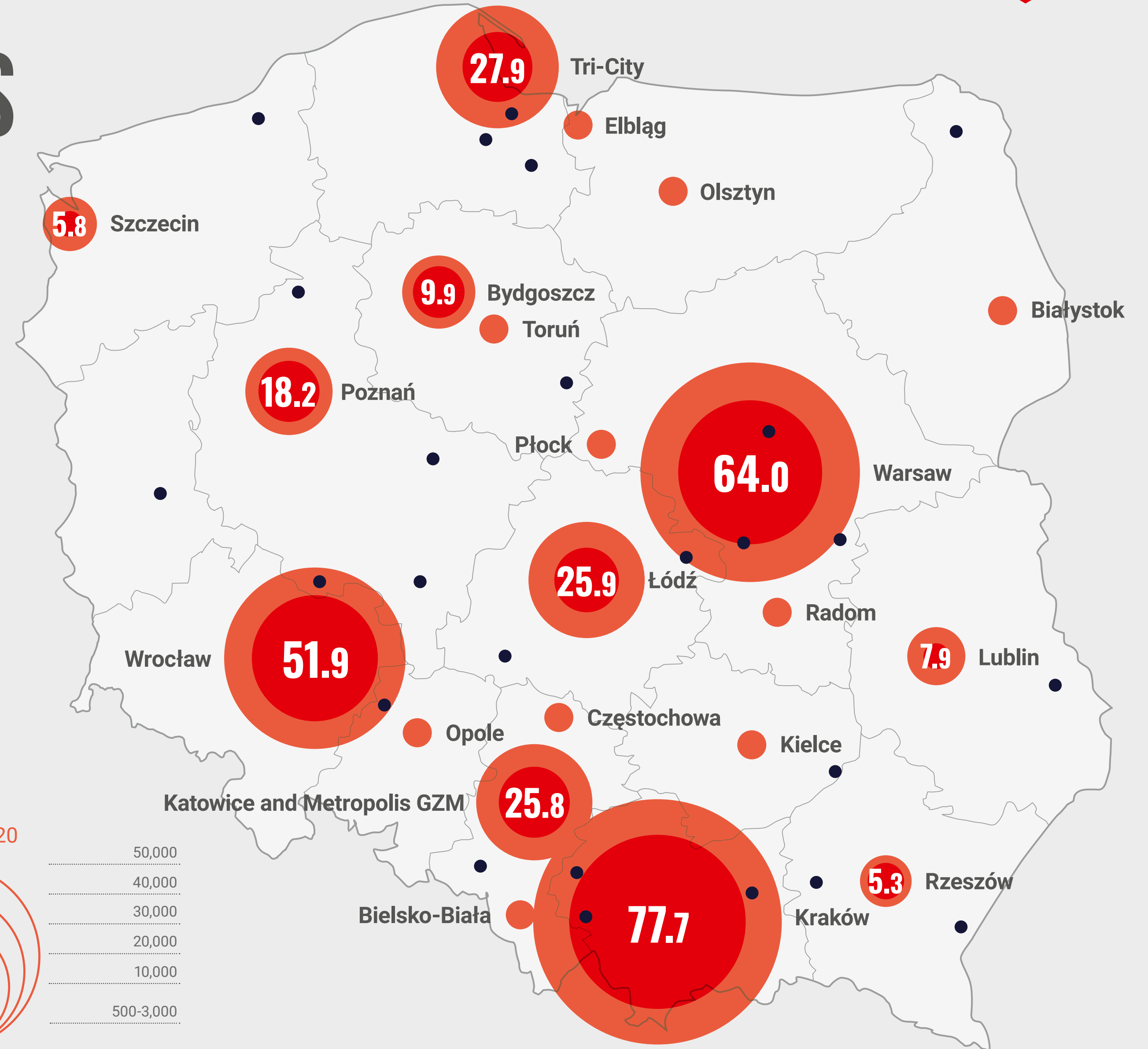
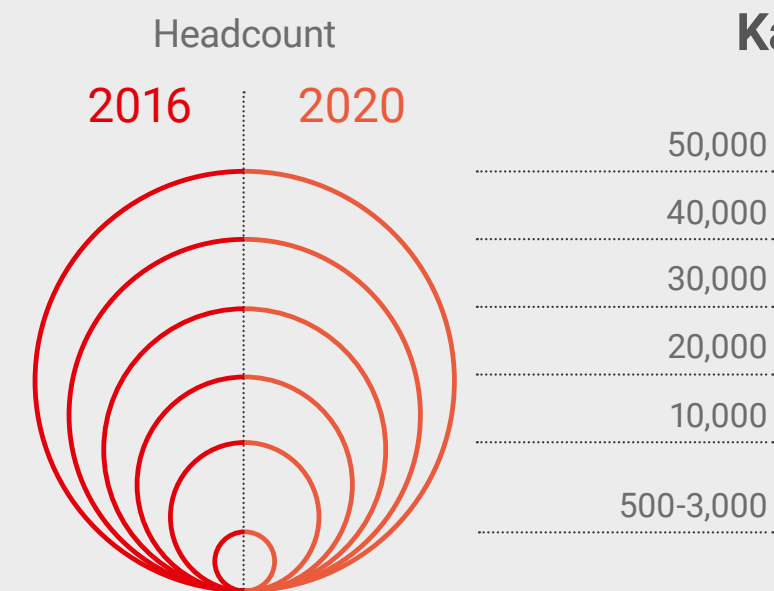
77,700

Number of people employed in the centers in the largest city in the sector: Kraków

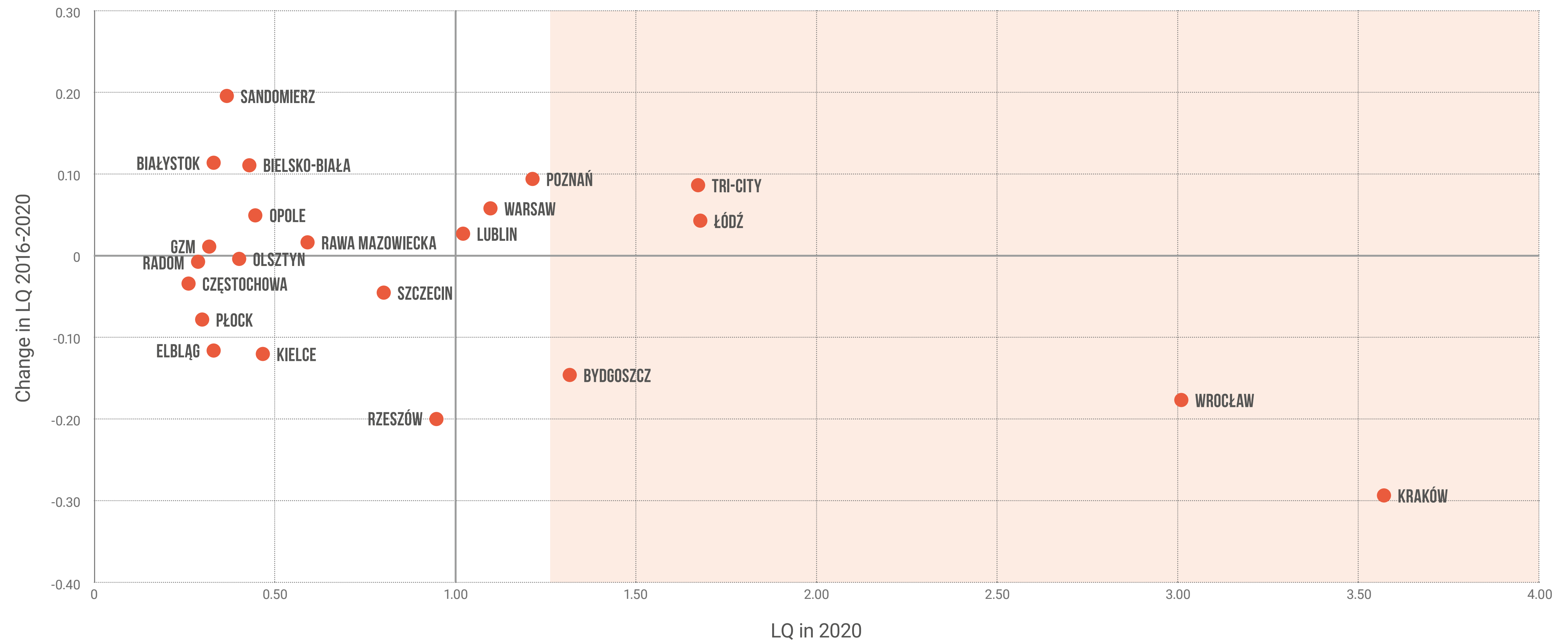


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Number of cities with employment exceeding 10,000



CITY SPECIALIZATION LQ



COVID-19, BUSINESS RESILIENCE & BUSINESS CONTINUITY

COVID19
is testing
the sector's
adaptability
and resilience

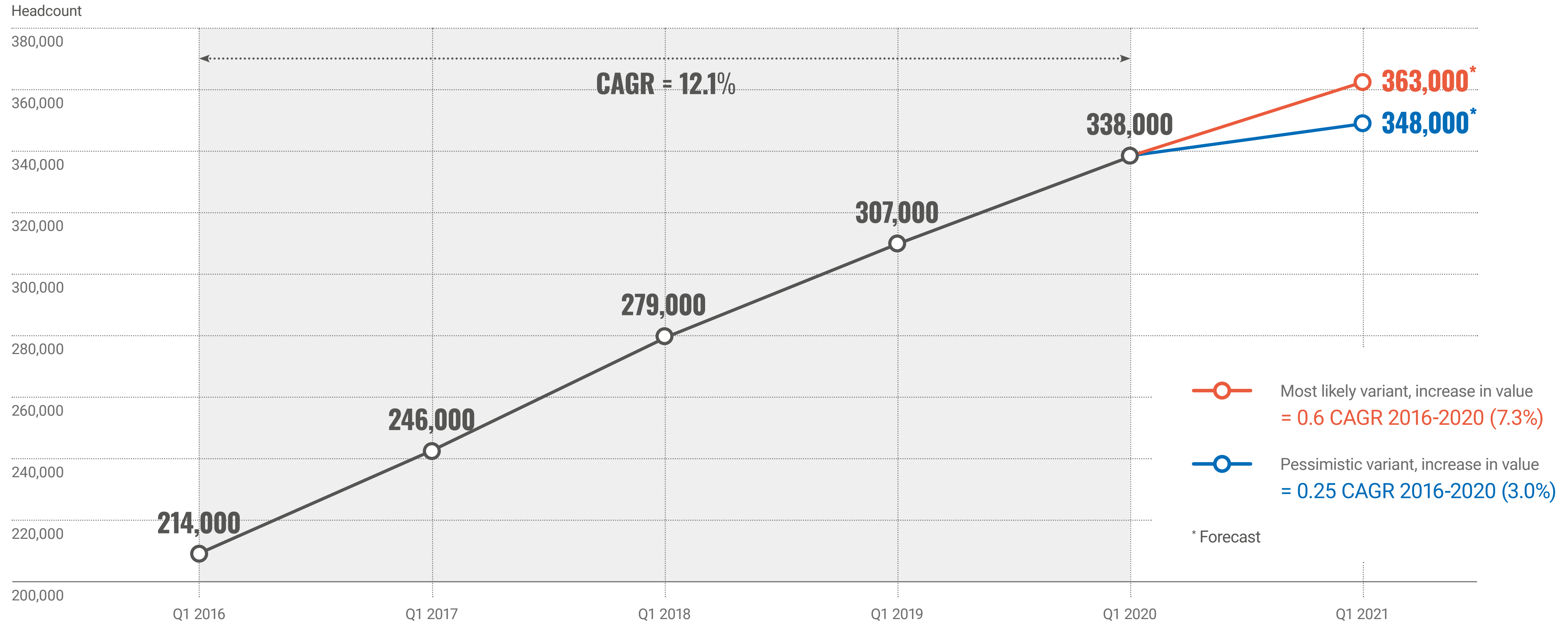
Sector
has already
proved
to be resilient,
flexible
and creative

Digital
transformation
occured

The sector will
feel the effects
of the crisis
to a lesser
extent than
industry
or other areas
of service
activities

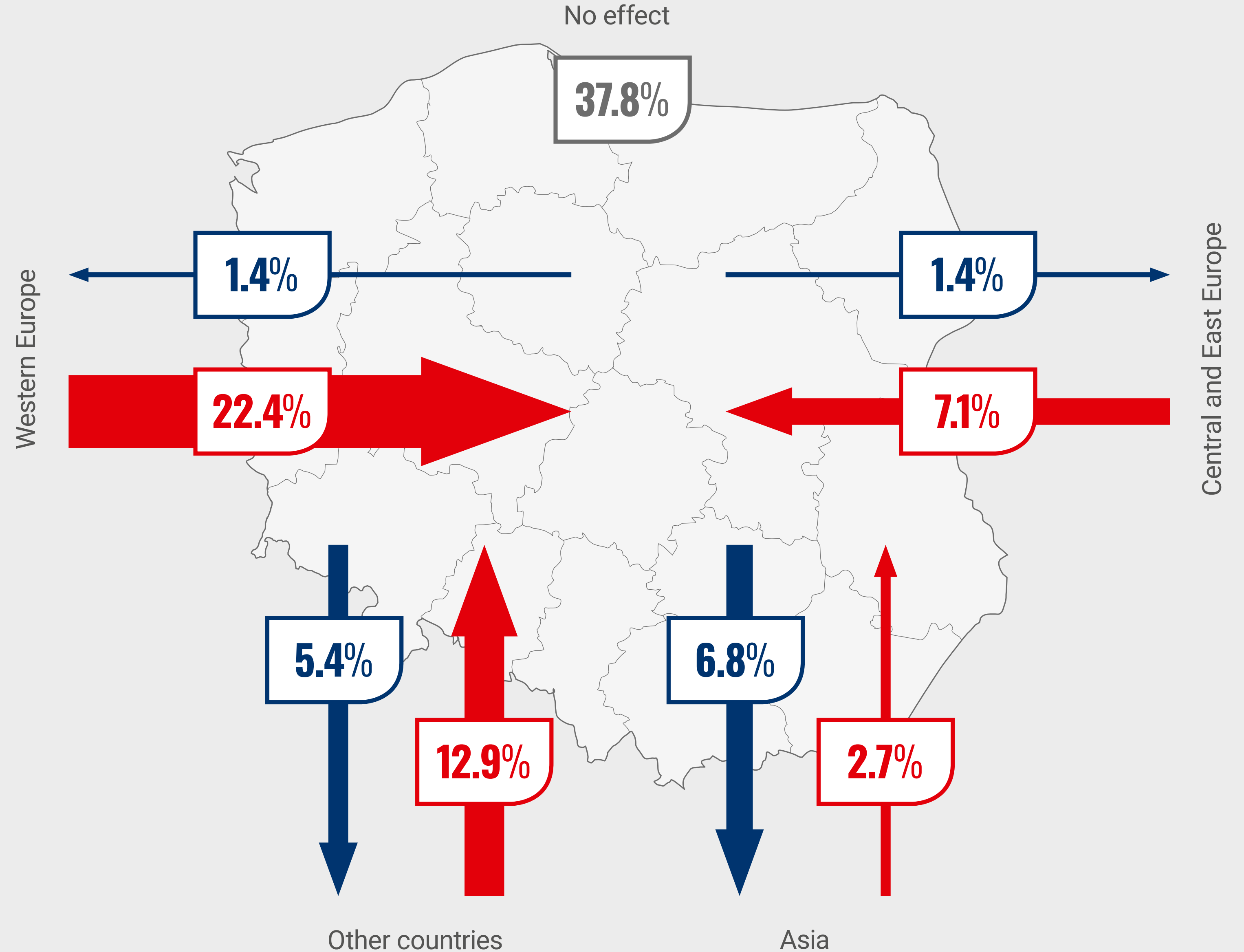
The global
economic
slowdown
is likely
to induce
the reallocation
of activities
to Poland
(Onshoring &
nearshoring)

THE SECTOR IS AND WILL BE GROWING IN POLAND

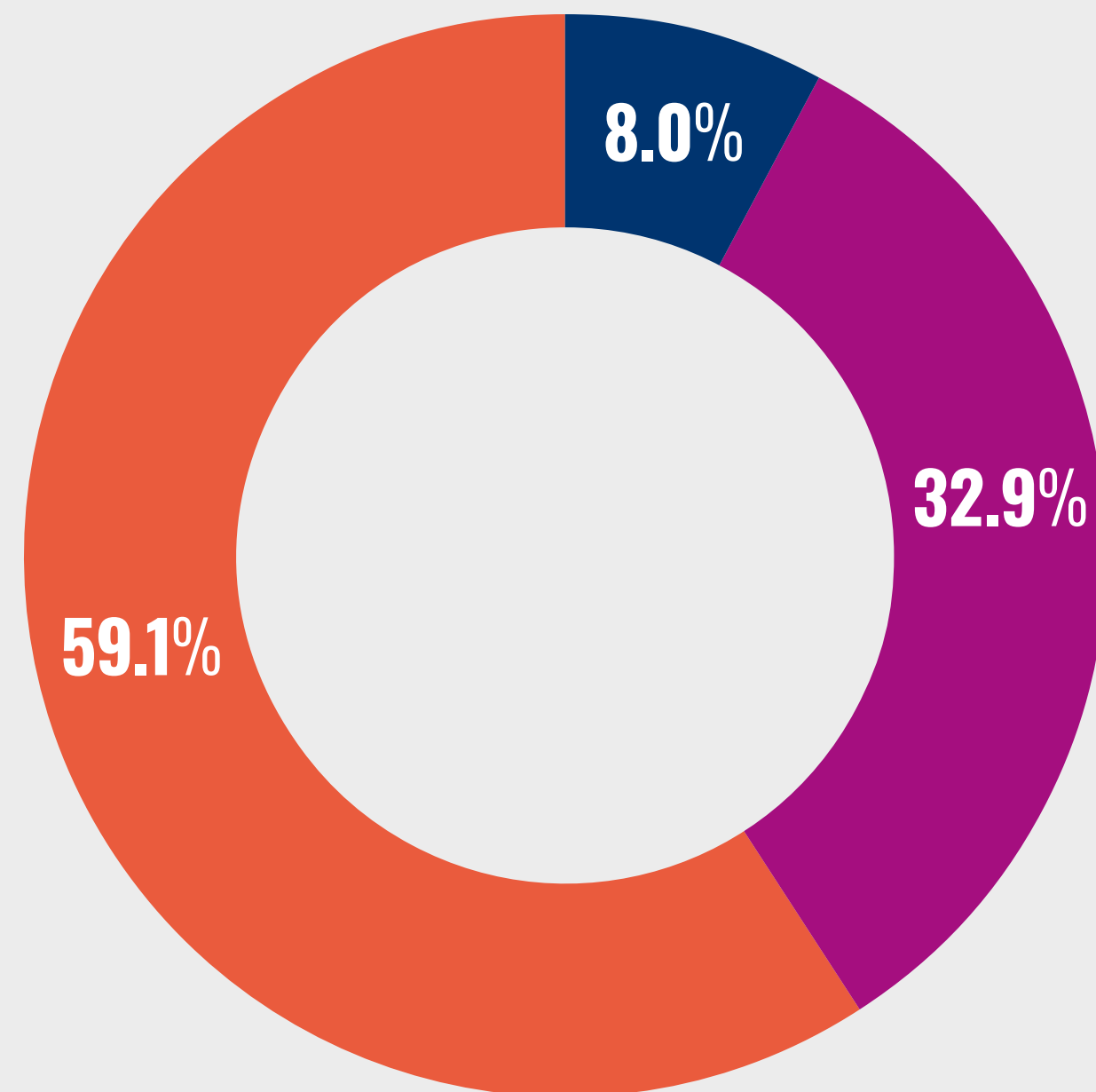





THE GLOBAL SLOWDOWN CAN FAVOUR POLAND AS A LOCATION

■ From Poland
■ To Poland



DIGITAL TRANSFORMATION



-  No, and we have no plans to implement it in the future
-  Not yet, but we are going to implement it in the future
-  Yes



SQL, JAVA, JAVASCRIPT

The 3 programming languages used most often in centers



JAVA

The programming language most in demand to the end of Q1 2021



POWERBI

The technology most in demand to the end of Q1 2021



23%

The share of companies using 10 or more programming languages simultaneously



9%

The share of companies using 10 or more information technologies simultaneously



Increased interest in cloud technologies, big data, RPA & data visualization

TRANSFORMATIONAL CHANGE ON-GOING & ACCELERATING

A new phase
of development
– entering
a mature phase

Clear upgrading
– transition
to higher
value-added &
more complex
functions

A gradual
shift from
back-office
to middle
office

Upskilling
– more
advanced
and skill-
intensive tasks
& skills of the
future on the
rise

Transition
from a trend-
follower to
a global
trend-setter
ahead

THANK YOU.

