POLISH INFORMATION AND FOREIGN INVESTMENT AGENCY

Business Services Sector in Poland 2016
Gaining Momentum

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Warsaw, June 7, 2016
<table>
<thead>
<tr>
<th>Statistic</th>
<th>Number</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Total employment in BSS</td>
<td>193,500</td>
<td></td>
</tr>
<tr>
<td>Average employment in BSS center</td>
<td>227</td>
<td></td>
</tr>
<tr>
<td>Total number of academic students in 2015</td>
<td>1,454,000</td>
<td></td>
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<tr>
<td>Number of languages in which services are provided</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Business Services Centers</td>
<td>852</td>
<td></td>
</tr>
<tr>
<td>Centers with employment 1,000+</td>
<td>36</td>
<td></td>
</tr>
<tr>
<td>Total number of groups of processes handled</td>
<td>1,701</td>
<td></td>
</tr>
<tr>
<td>Polish cities with total employment in BSS of 10,000+</td>
<td>7</td>
<td></td>
</tr>
</tbody>
</table>

Types of centers

<table>
<thead>
<tr>
<th>Type of center</th>
<th>Number</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSC</td>
<td>238</td>
<td>63,697</td>
</tr>
<tr>
<td>BPO</td>
<td>133</td>
<td>44,440</td>
</tr>
<tr>
<td>IT</td>
<td>368</td>
<td>58,763</td>
</tr>
<tr>
<td>R&amp;D</td>
<td>113</td>
<td>26,597</td>
</tr>
</tbody>
</table>

- 36 centers employing over 1,000 staff in Poland
- 16 out of 36 – in Krakow

Country of origin of Business Services Sector companies

Processes and languages in centers

Groups of processes

- Software Development: 452
- IT helpdesk/Application Administration: 208
- Finance & Accounting: 205
- Customer Service: 179
- Data Centre/Infrastructure Management: 103
- R&D: 92
- HR: 91
- Financial Services: 90
- Data & Document Management: 62
- Research & Analysis: 59
- Supply Chain: 57
- Payroll: 54
- Marketing: 26
- Legal Services: 15
- Telemarketing: 8

Languages in BPO & SSC

- 1 foreign language: 36%
- 2 foreign languages: 36%
- 3 foreign languages: 15%
- 4 foreign languages: 7%
- 5 and more foreign languages: 6%

- EY, Infosys, Qiagen – 11 groups of processes
- Thomson Reuters – 31 languages

BSS centers in Poland

Business services investment

- 34 completed BPO, SSC, ICT, R&D projects
- 53% share of reinvestment
- employment: 7,010
- investment value: 100.7 m EUR

Source: PAiIZ compilation, June 2016
As of June 2016, PAiiIZ is assisting 180 potential FDI projects:

- Total value of investment: EUR 3.6 bn
- Total number of new workplaces: 40,838 (BSS=51% 😊)

<table>
<thead>
<tr>
<th>Main sectors:</th>
<th>Major countries – investors:</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSS=SSC+IT+BPO (67)</td>
<td>USA (47)</td>
</tr>
<tr>
<td>automotive (34)</td>
<td>Germany (23)</td>
</tr>
<tr>
<td>R&amp;D (16)</td>
<td>Switzerland (11)</td>
</tr>
<tr>
<td>food processing (13)</td>
<td>South Korea, Japan (10)</td>
</tr>
<tr>
<td>aviation (7)</td>
<td>Denmark (8)</td>
</tr>
</tbody>
</table>

Active projects serviced by PAiiIZ
Thank you!

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