



# Kraków in the World

**What's in Store for Krakow-based  
RBS?**



## SPEAKERS



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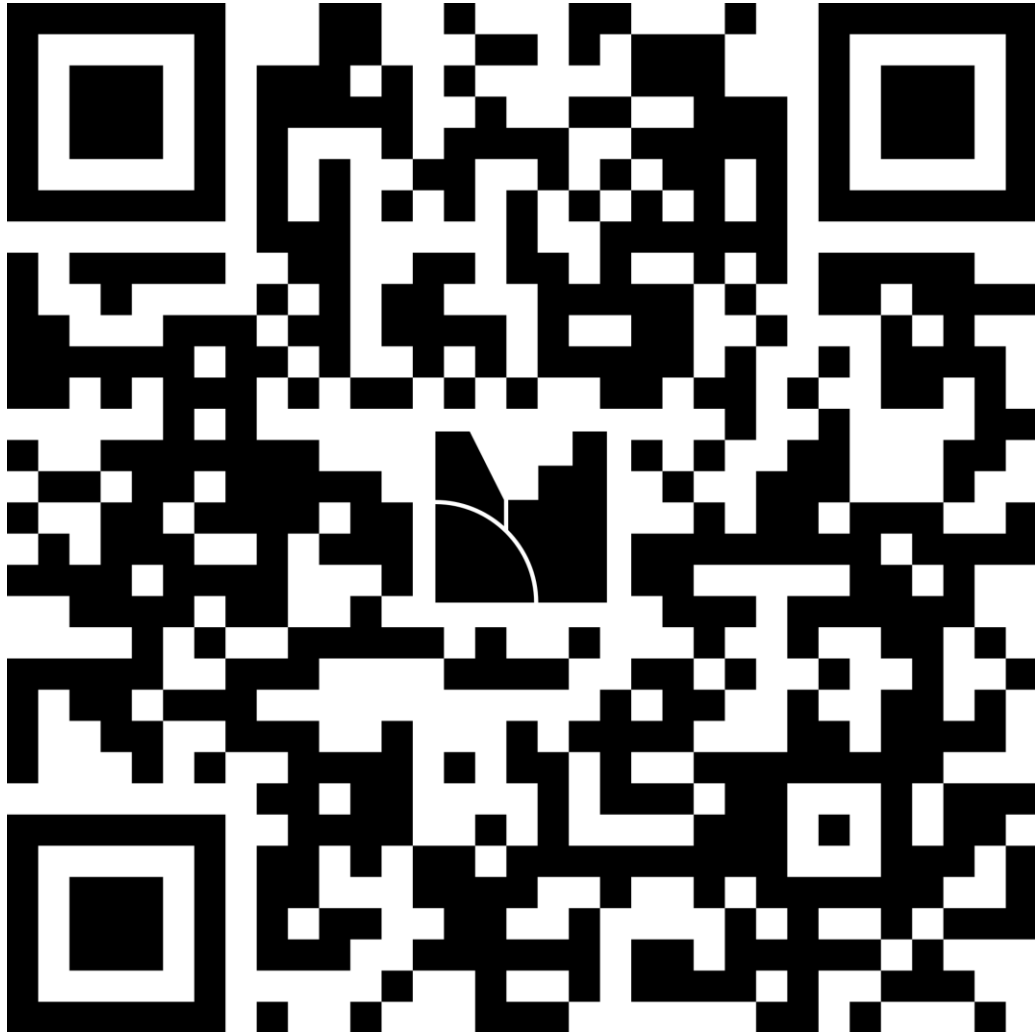


# **BSS/IT/R&D Market in Kraków**

**Overview of Business Services  
Sector and it's strategic  
positioning in Krakow**



# Video: Krakow BSS in 2014



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**In which place in Krakow there was established one of the very first SSCs - Motorola?**

- a Skyscraper K1 (Błękitek)**
- b Przegorzaly Palace**
- c Wawel Castle**
- d Krakow Business Park**



**What percentage of the global internet flows through the supervising eye of the one of Cybersecurity Centres in Krakow?**

- a      7%**
- b      15%**
- c      20%**
- d      38%**





**What percentage of graduates of all Universities in Krakow is absorbed by the BSS/IT/RD SSC industry in Krakow?**

- a      2%**
- b      14%**
- c      48%**
- d      65%**





## KRAKOW BSS/IT/R&D MARKET

Krakow operates 292 centres with 120k professionals, serving 36 languages and supported by robust academic infrastructure and continuous talent pipeline.



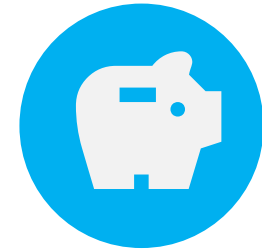
### ACADEMIC FOUNDATION

23 higher education institutions supporting continuous talent development.



### KNOWLEDGE INTENSITY

55% knowledge-intensive work vs 45% transactional



### SCALE OPERATIONS

45 centres employing 500+ people each with global reach



## MID-TERM FUTURE CAPABILITIES

### Talent Pipeline Growth

Massive untapped potential with strong educational infrastructure

132k students with 31k graduates across all disciplines

BSS/IT/R&D sector absorbs only 14% of graduates – huge growth potential remains

7% international students

### Skills Diversification Strategy

Strategic focus on high-value disciplines creating opportunities for advances BSS service delivery capabilities

20% business-related studies providing direct talent pipeline

17% mathematical and engineering sciences for analytical capabilities

12% IT-related studies supporting global digital transformation initiatives



## LONG-TERM STRATEGIC OUTLOOK

### **Global Strategic Challenge**

Navigating deglobalisation trends, geopolitical shifts including China's strategic challenger position requiring adaptive strategies.

### **Institutional Power Evolution**

Continuous migration of effective power centres beyond traditional offices and elected institutions creating new governance dynamics.

### **Strategic Foundation Building**

Solid foundations through Adaptive City model implementation, with new development cycle beginning for sustained competitive advantage.

### **Future Workstreams Focus**

ASPIRE initiatives connecting City strategy 2050, University Platform development, and primary/secondary education enhancement for long-term success.



# Volvo Cars story in Kraków

# Volvo Cars Tech Hub Poland

Strategic technology centre focused on developing software-defined vehicles.



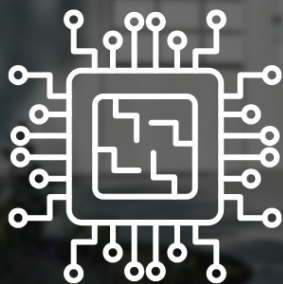
Est. 2023



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Based in Krakow



Software  
& Electronics  
Platform



Save Vehicle  
Automation



Connectivity  
& Infotainment



Manufacturing  
& commercial  
operations





## Why Kraków?

### Labour pool

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60K

### Labour source

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22 Universities

### Highly skilled employees

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7 domains already present  
in Tech Hub

### New office

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### Ease of travel

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5 Ryanair flights a week

### Political stability

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82% of EU support

### Attractive to foreigners

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### Cultural proximity

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### Proximity to Kosice plant

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### Cost

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What's ahead?







# What's in Store for Krakow?

Infrastructure and Real Estate  
perspective



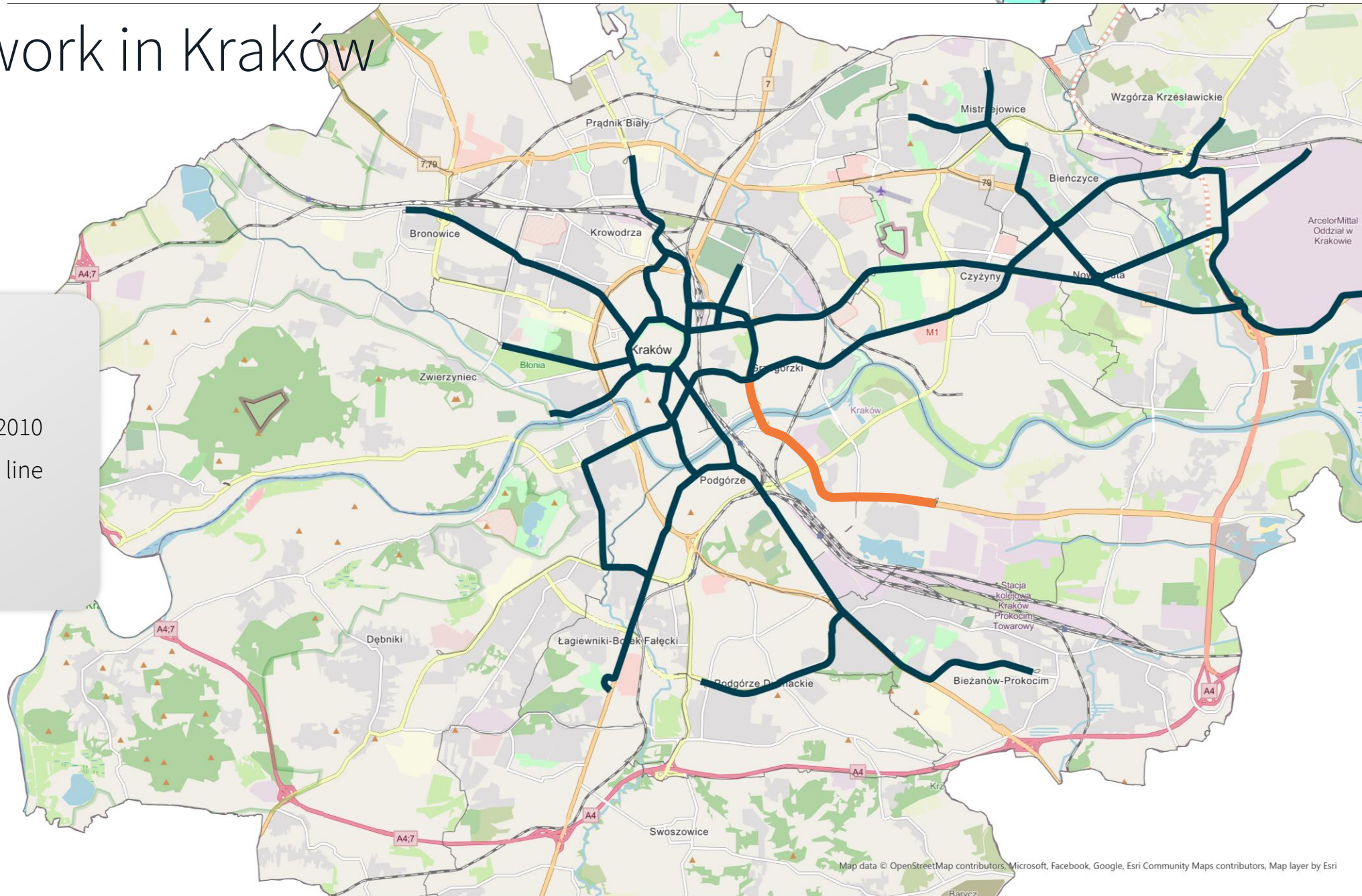
# Tram network in Kraków

Evolution  
2010

## Legend:

### Infrastructure

- Tram network in 2010
- Newly completed line to Mały Płaszów











# Rail network in Kraków

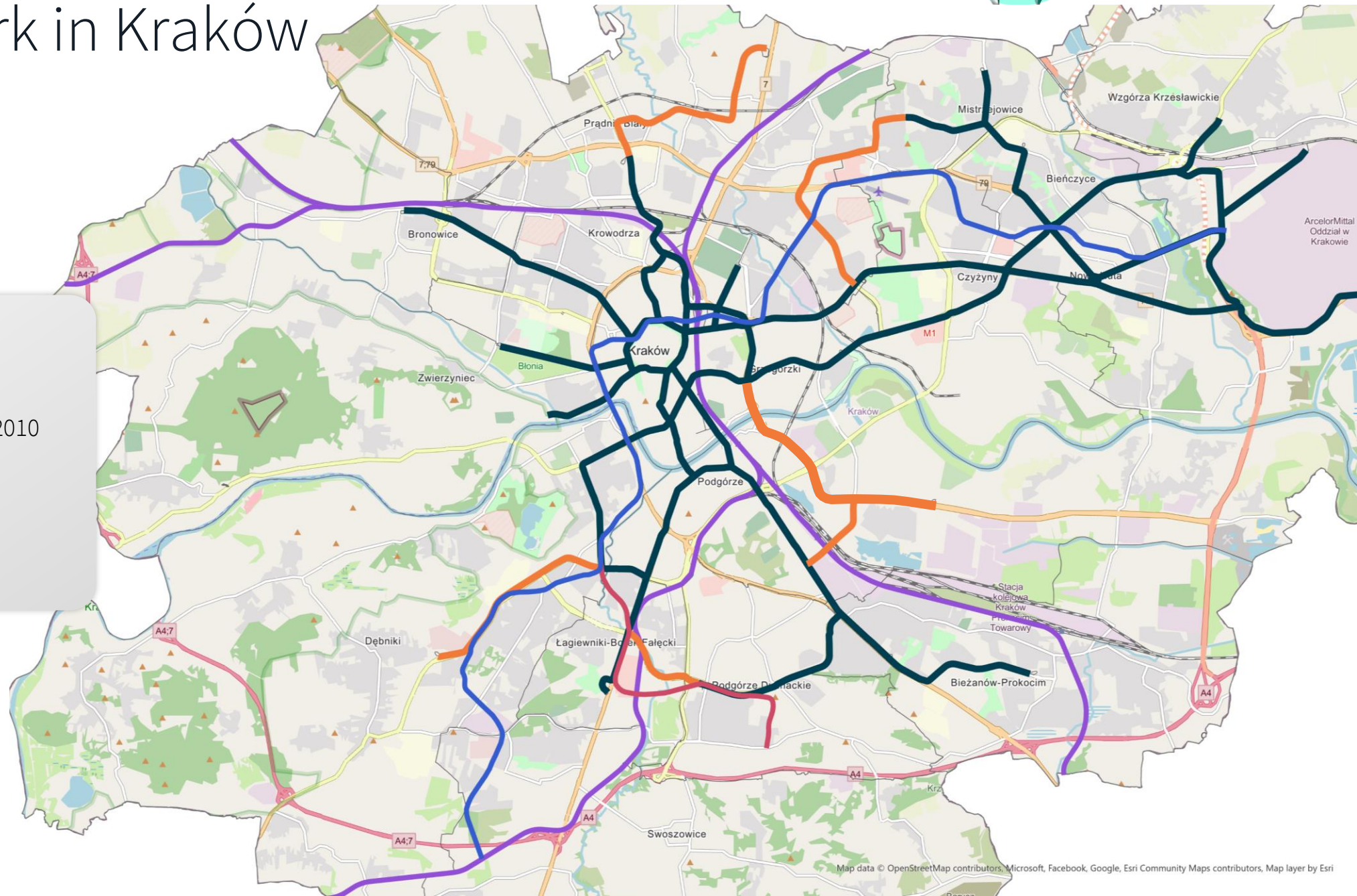
Evolution

Now & the future

## Legend:

### Infrastructure

-  Tram network in 2010
-  Tram extensions
-  Rapid Urban Rail
-  Subway line





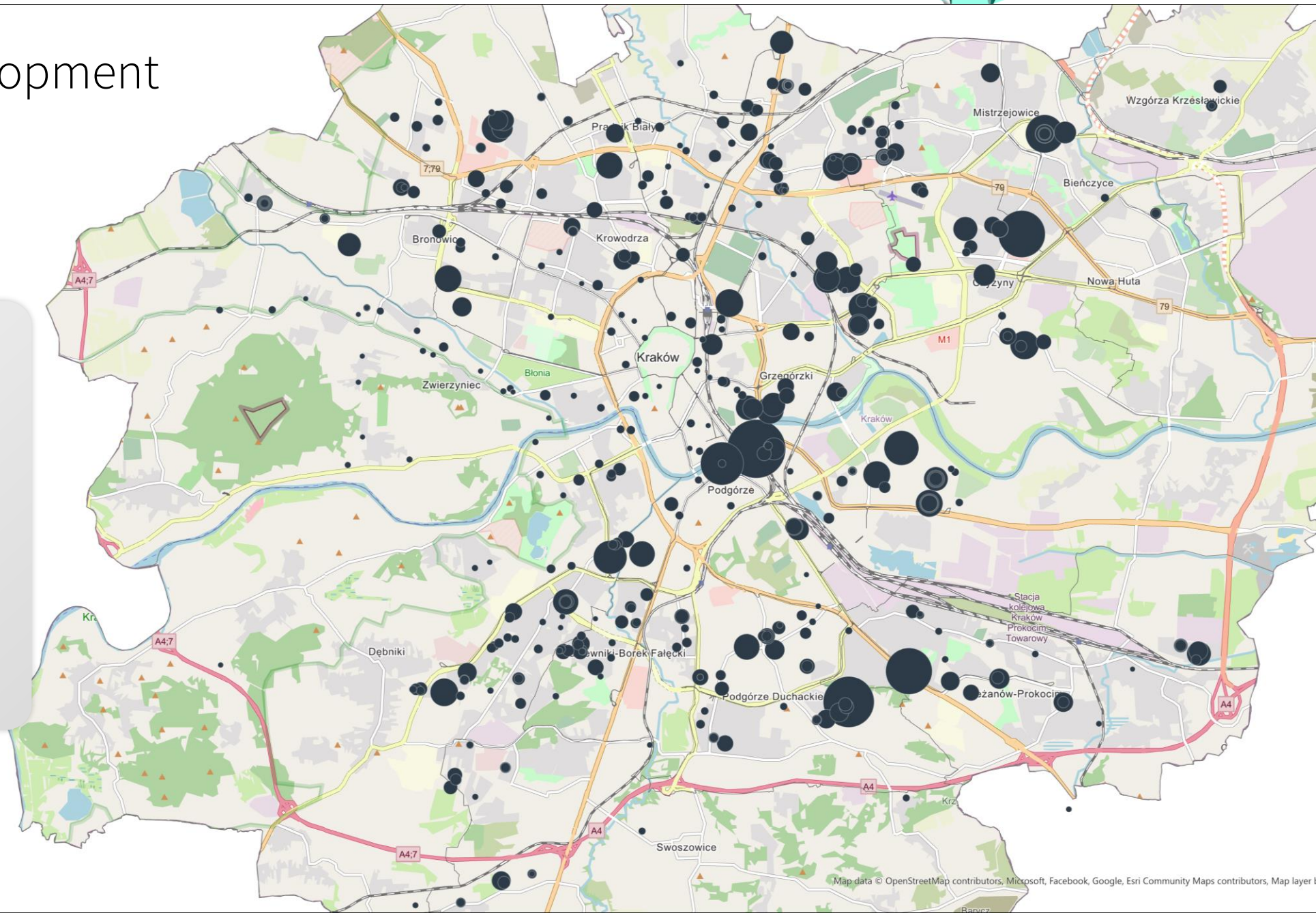


# Residential development across years 2010 – 2015

## Legend:

### Residential supply

- Regular residential







# Residential development across years 2010 – H1 2025

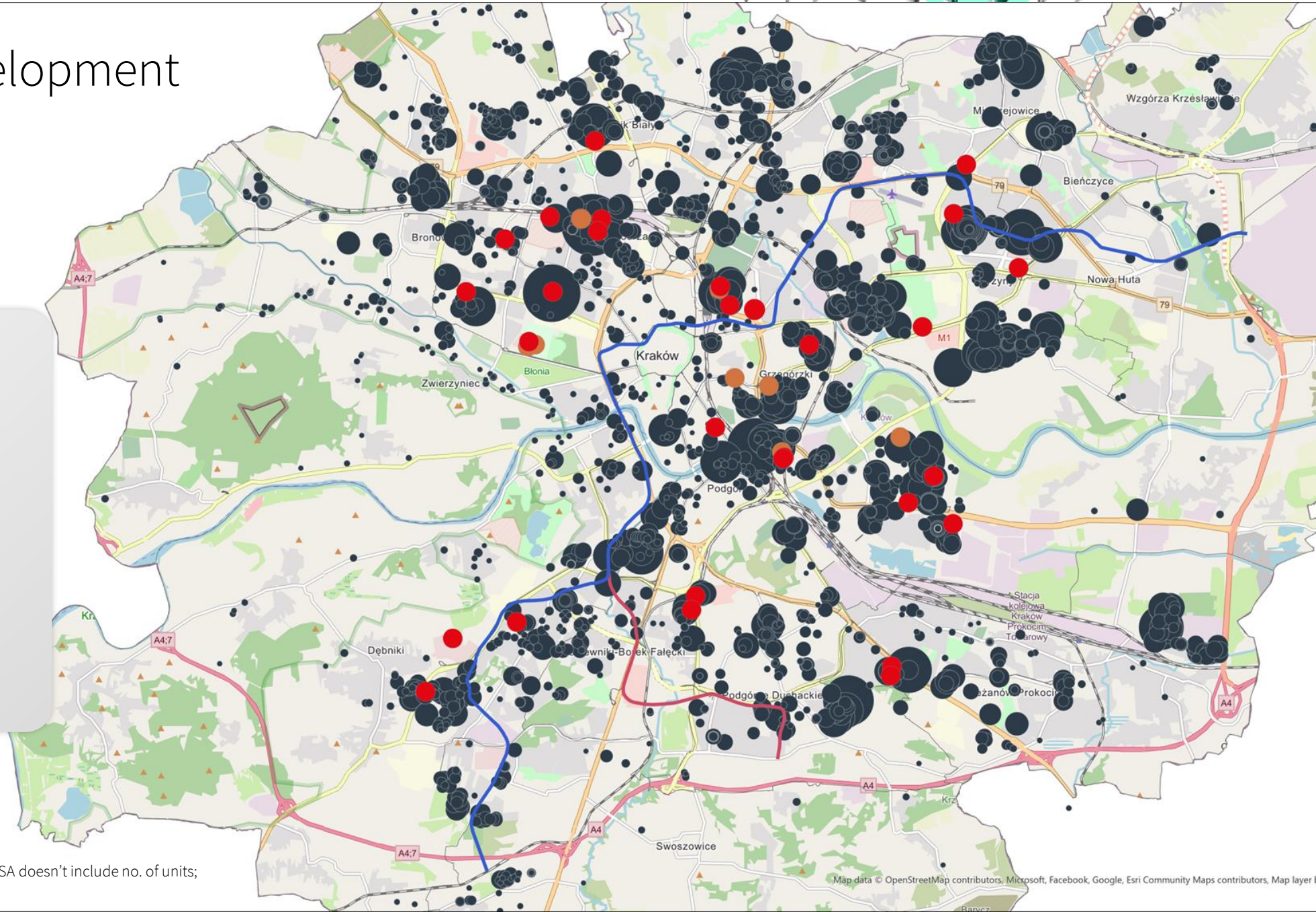
## Legend:

### Residential supply

- Regular residential
- PRS
- Student housing

### Infrastructure

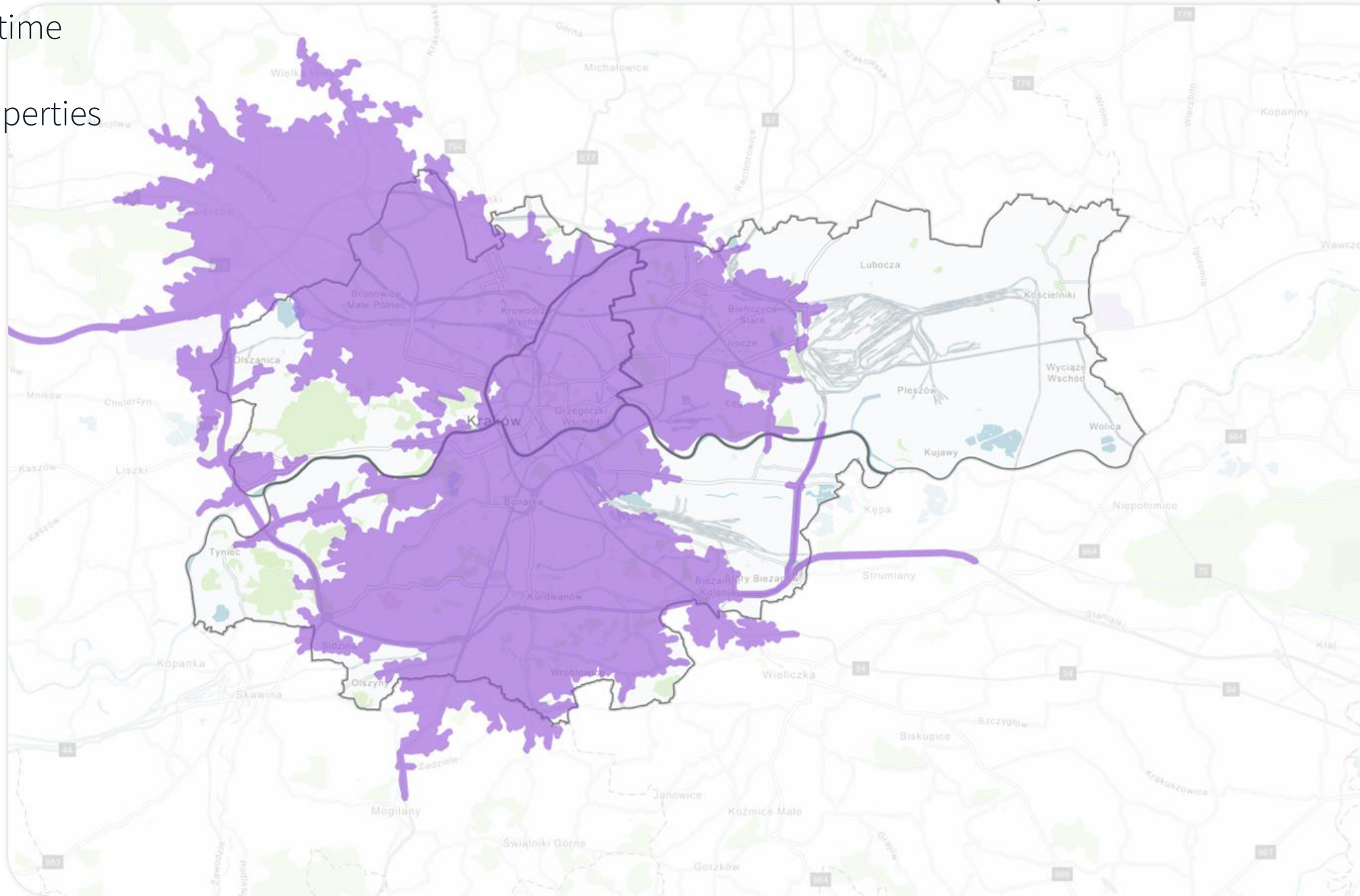
- Subway line





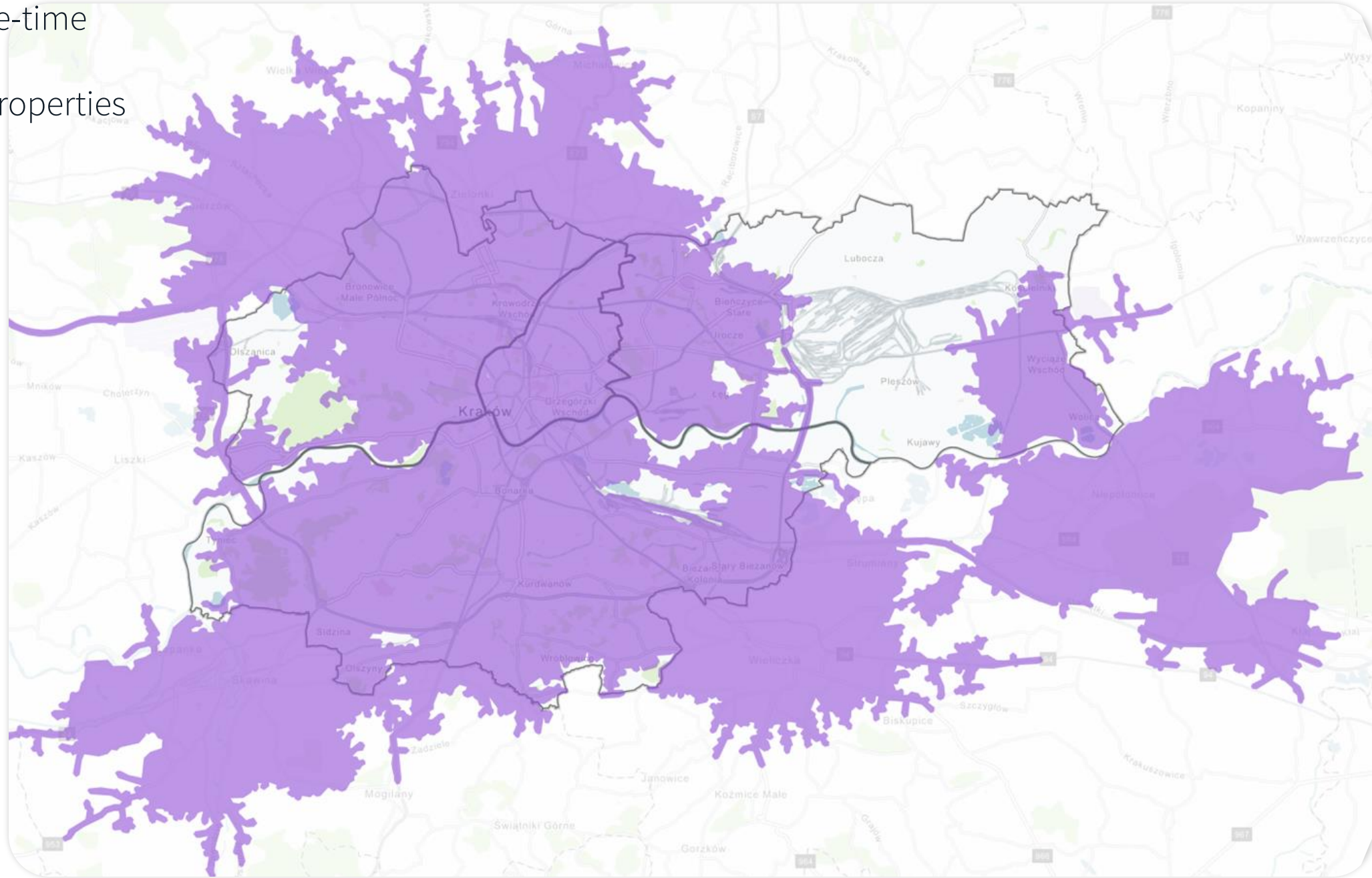


A 10-minute Drive-time  
Catchment Area  
Towards Retail Properties  
in 2015





A 10-minute Drive-time  
Catchment Area  
Towards Retail Properties  
in 2025







Shift into major Office Market in Poland in last 15 years

## 2010

Once, we talked about  
the Poland's Office Market  
as 'Warsaw and the regions.'

Stock: 0.45 mln sq.m.  
Take-up: 85 k sq.m.

15 years



Over 3x  
larger market

## 2025

Now, we talk about  
'Warsaw, Kraków,  
and the regions.'

Stock: 1.8 mln sq.m.  
Take-up: 267 k sq.m.\*

# Kraków in the Global Picture

**Cost, capability, scale**



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**If your company, with its GBS maturity at current levels,  
would need to pick a location for its main EMEA hub:  
would Krakow be an option?**

- a      Definitely**
- b      Very Probably**
- c      Probably**
- d      Possibly**
- e      Probably Not**
- f      Definitely Not**

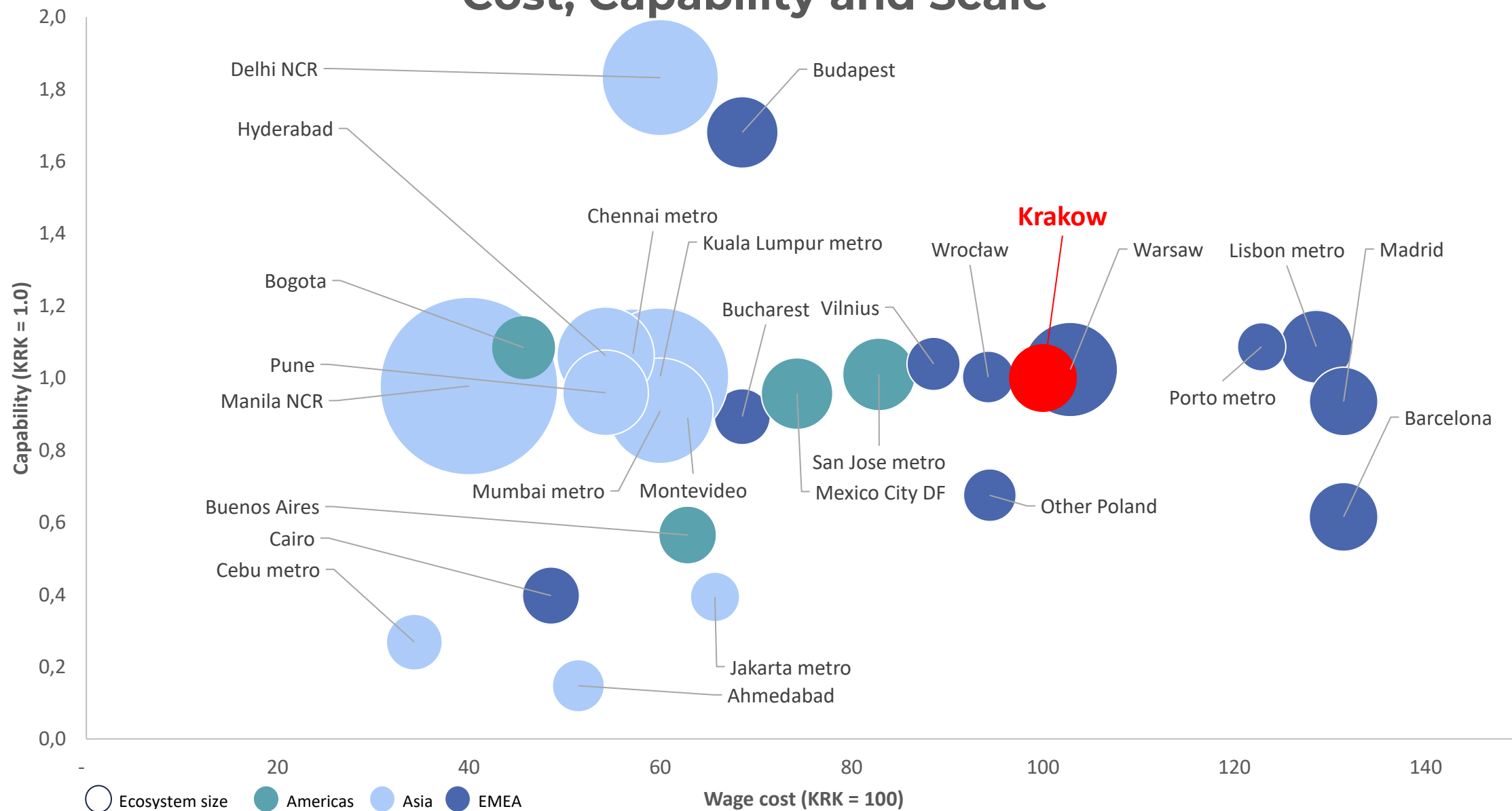


**Post-Covid, Krakow GBS cluster employment levels have grown around 6 percent year-on-year. What are your expectations for our “sector” headcount for the 2025-2030 period?**

- a It will continue to increase at least 6 percent annually**
- b It will continue to increase below 6 percent annually**
- c It will increase nor decrease**
- d It will decrease by around 3 percent annually**
- e It will decrease by more than 3 percent annually**
- f I haven't got the foggiest idea and will try to get redeployed by 2030**



## Cost, Capability and Scale





**What is the next step  
for Krakow?**





**What should we not do (or do different) in Krakow to avoid the fate of some outsourcing locations?**

**What should be the next steps to secure the bright future of GBSs in Krakow?**