



Kraków in the World

What's in Store for Krakow-based CBS?



SPEAKERS



Dorota Gruchała, Head of Kraków Office, JLL



Przemek Berendt, Head of Tech Hub Poland, Volvo Cars



Elias van Herwaarden, Principal, Locationperspectives



Przemek Roth, Interim Chairman, ASPIRE



BSS/IT/R&D Market in Kraków

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



Video: Krakow BSS in 2014



WWW.MENTI.COM
CODE: 8812 6415



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

- a Skyscraper K1 (Błękitek)**
- b Przegorzały 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%**



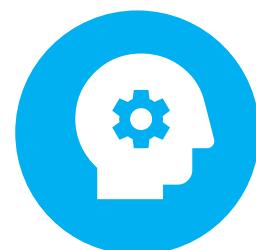
KRAKOW BSS/IT/R&D MARKET

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 advanced 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.



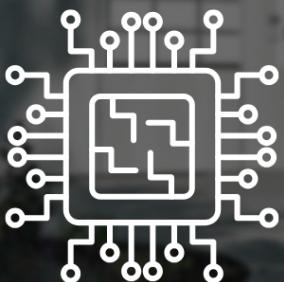
Est. 2023



>200



Based in Krakow



Software
& Electronics
Platform



Save Vehicle
Automation



Connectivity
& Infotainment



Manufacturing
& commercial
operations





Why Kraków?

Labour pool

60K

Labour source

22 Universities

Highly skilled employees

7 domains already present in Tech Hub

New office

Ease of travel

5 Ryanair flights a week

Political stability

82% of EU support

Attractive to foreigners

Cultural proximity

Proximity to Kosice plant

Cost



What's ahead?





What's in store for Krakow?

Infrastructure and Real Estate
perspective



Tram network in Kraków

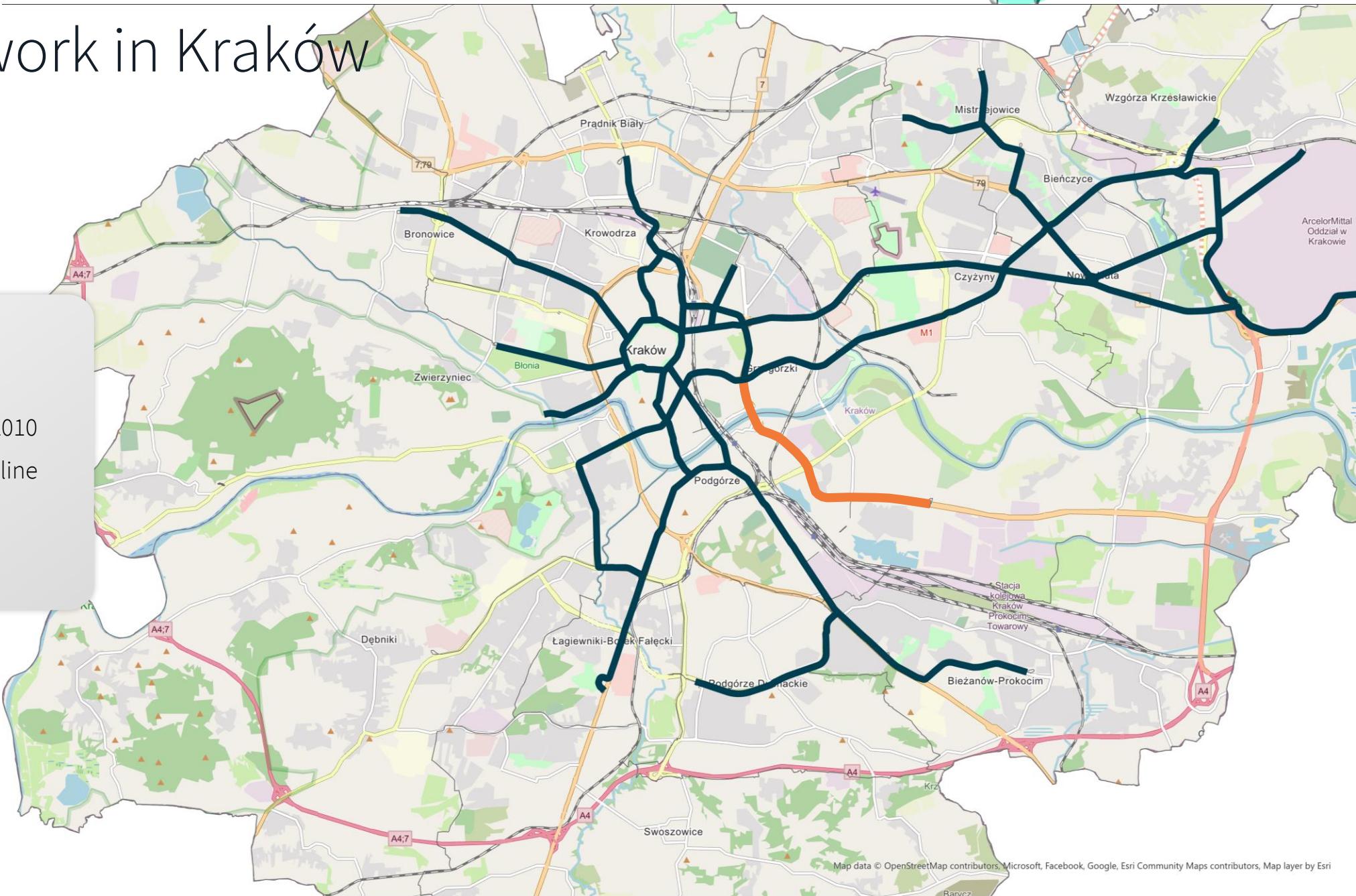
Evolution

2010

Legend:

Infrastructure

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



Rail network in Kraków

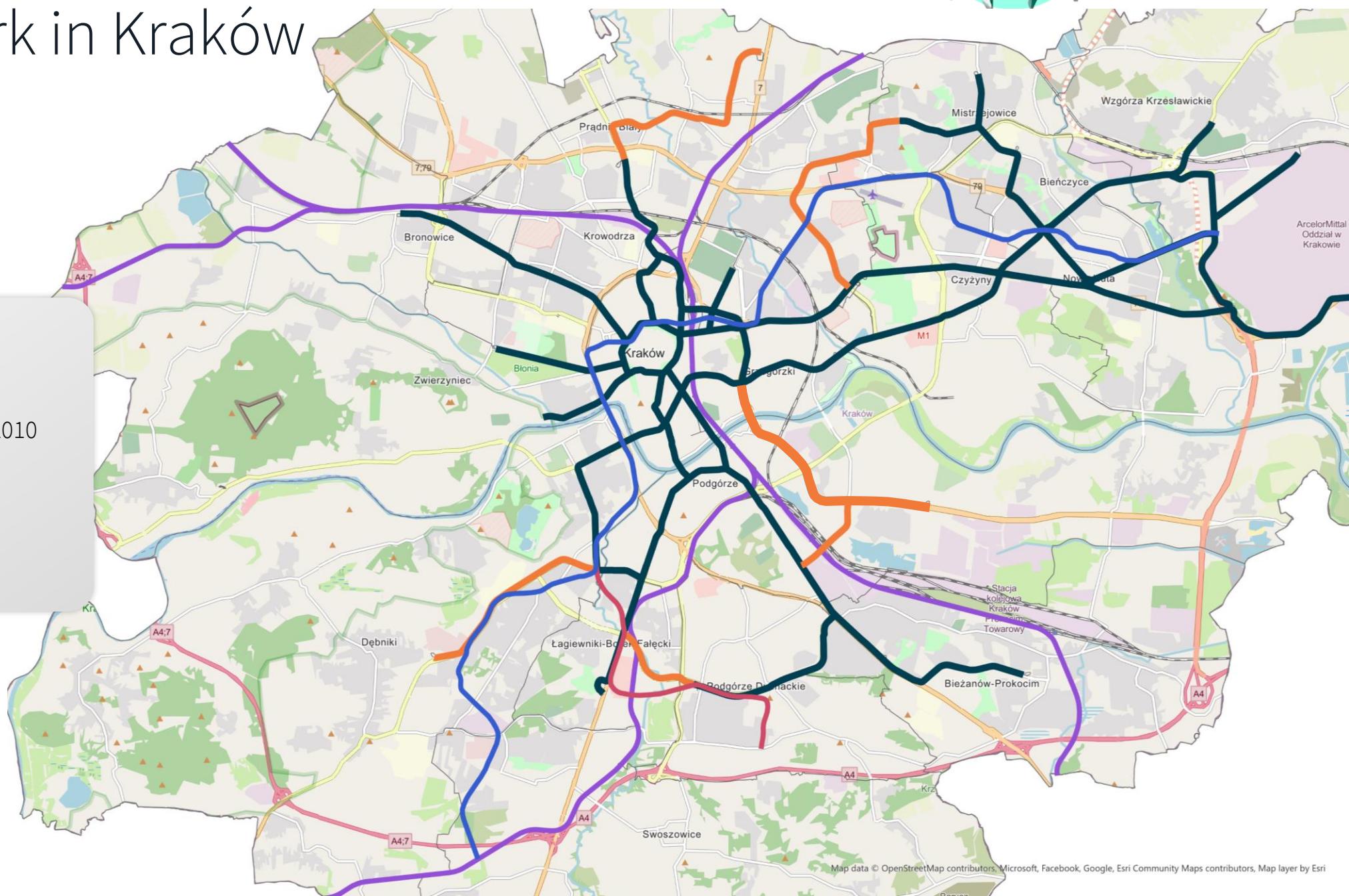
Evolution

Now & the future

Legend:

Infrastructure

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

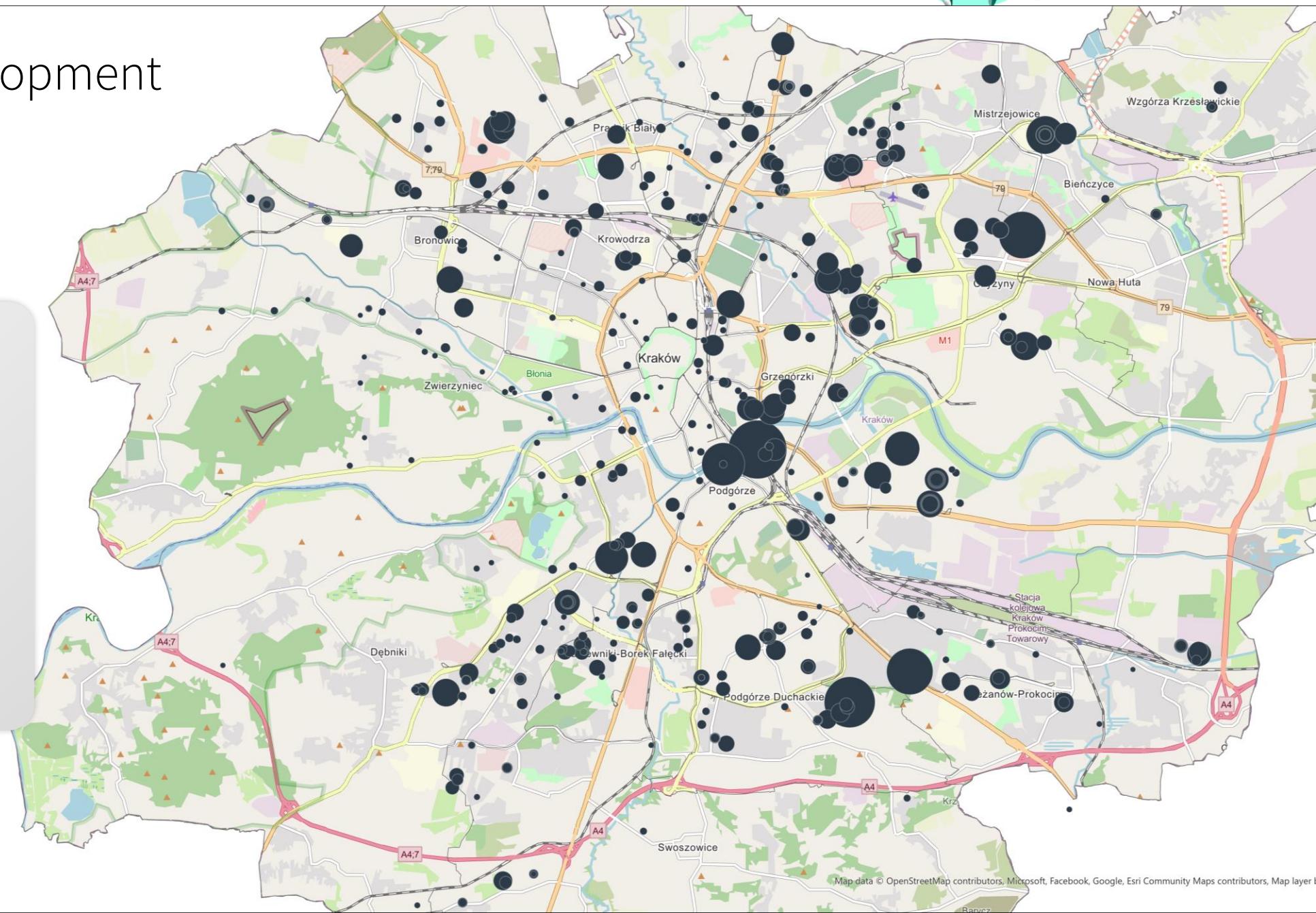


Residential development across years 2010 – 2015

Legend:

Residential supply

● Regular residential



Residential development across years 2010 – H1 2025

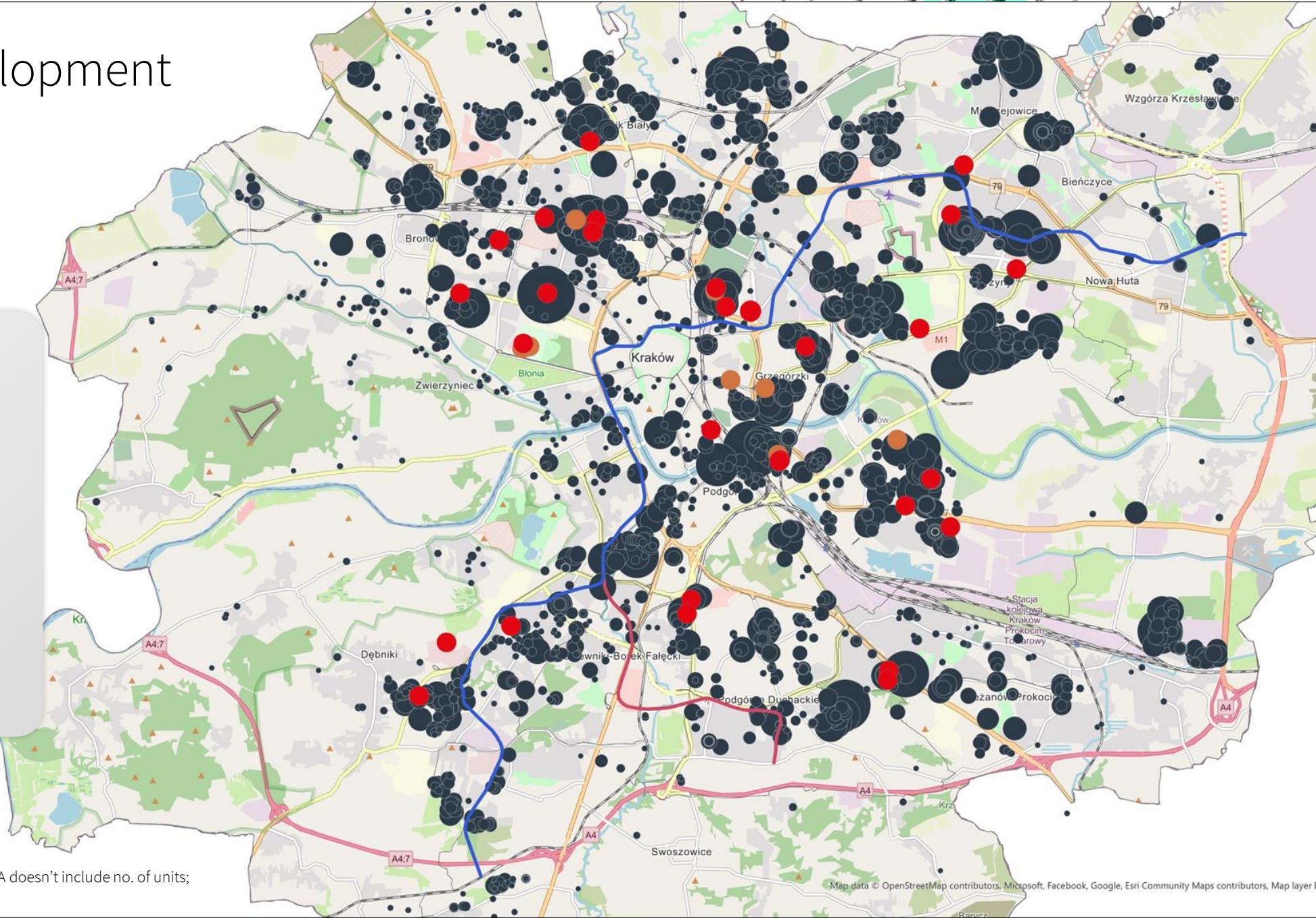
Legend:

Residential supply

- Regular residential
- PRS
- Student housing

Infrastructure

- Subway line

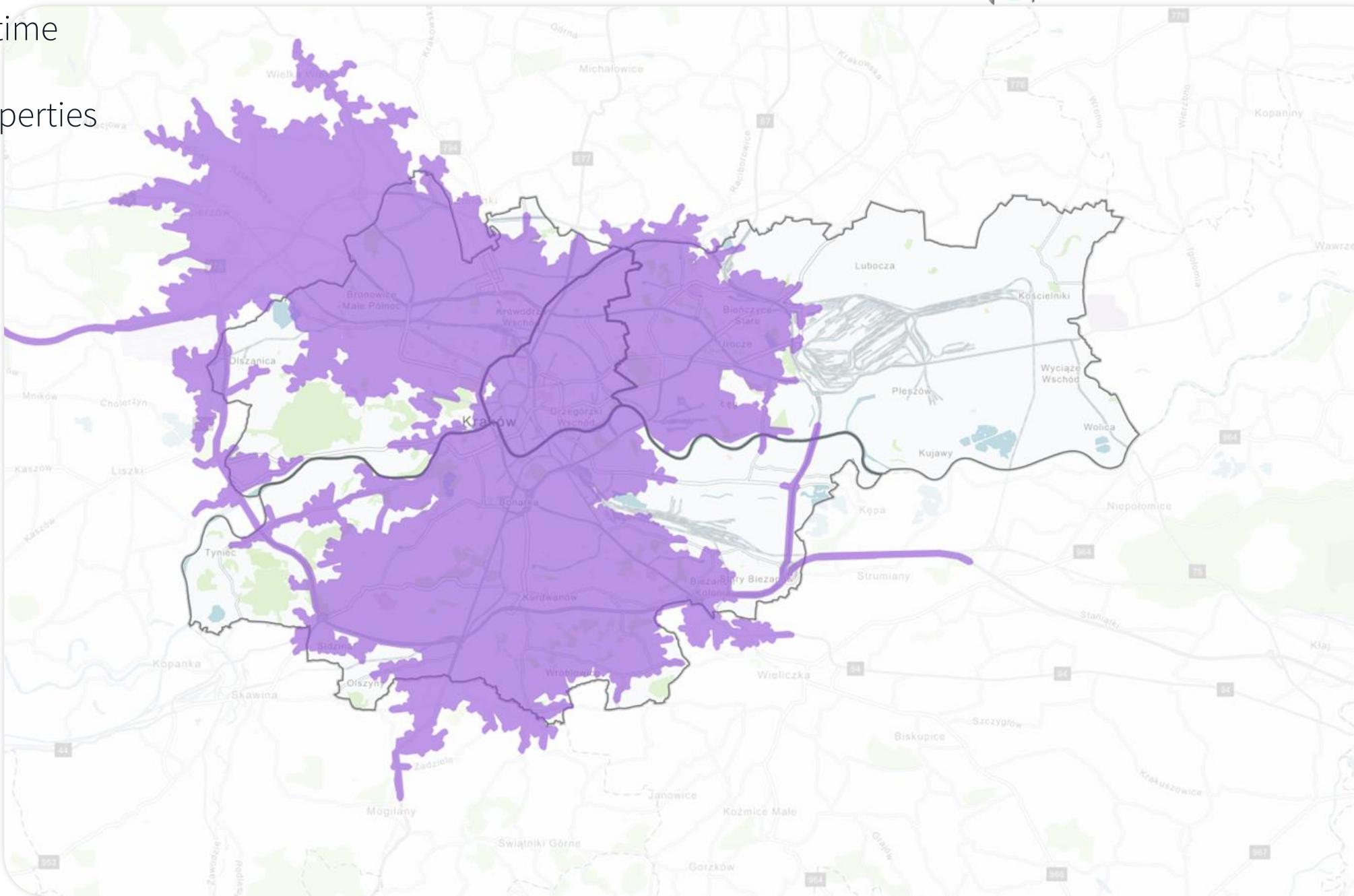


| Source: JLL Living data; data on PRS and PBSA doesn't include no. of units;

Map data © OpenStreetMap contributors, Microsoft, Facebook, Google, Esri Community Maps contributors, Map layer

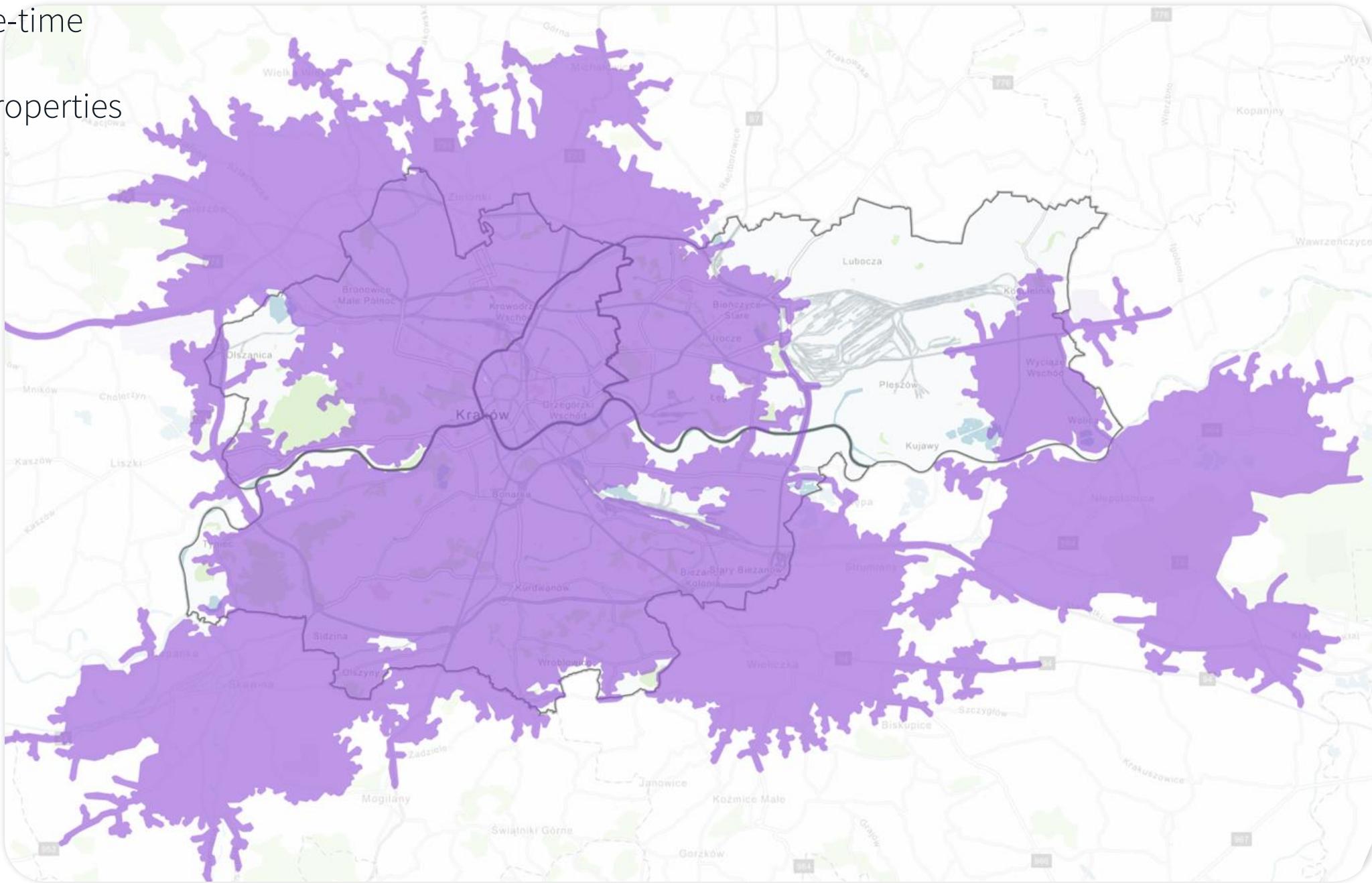


A 10-minute Drive-time
Catchment Area
Towards Retail Properties
in 2015





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



WWW.MENTI.COM
CODE: 8812 6415



**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**

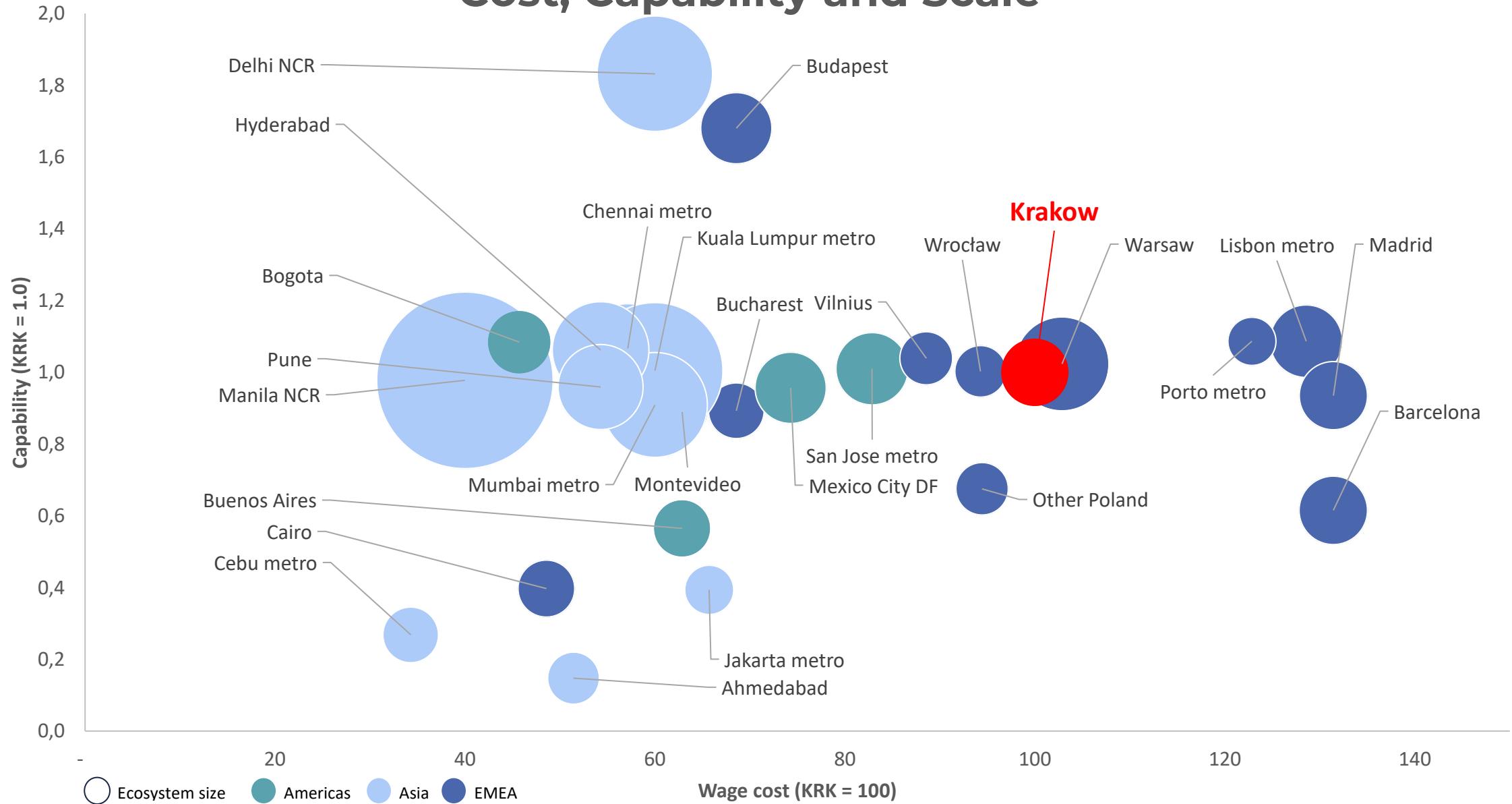


Post-Covid, Krakow GBS cluster employment levels have grown around 6 percent year-on-year. What are your expectations for our “sector” headcount for the 2025-2030 period?

- 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?