

# Onshore, Nearshore, Offshore: Unsure?

**A 2013 Polish Perspective **





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## Poland: The Destination for Modern Business Services

The range of functions that are being near/off-shored to CEE is growing in complexity at a faster pace than in Asia. Poland has a maturing outsourcing market and is a long-term investment destination in which to settle, expand and evolve one's business.

2

## Business Environment

Poland is one of the most rapidly growing markets in Europe. A high level of investment attractiveness and a declining complexity of doing business.

3

## Labour Market

A growing number of experienced employees and skilled graduates, a wide diversity of foreign language knowledge, attractive labour costs, significant mobility and low attrition rates. Cost arbitrage is no longer given the highest weighting in the decision-making hierarchy.

4

## Grants & Incentives

Investors from the business services sector in Poland can benefit from different types of state aid, as well as incentives from EU funds and EU R&D programs via their Polish registered entities.

5

## Connectivity

Poland, with its 12 international airports, is well connected to all major cities in Europe within two to three hours' flying time. Poland is also located in a favourable time zone for global communications.

6

## Real Estate Market

Poland's office market is developing fast; it offers a wide range of office locations and high quality office space that meets the needs of the modern business services sector.

# Poland: The Destination for Modern Business Services

## Sector trends

Since 2009, CEE as a whole has won proportionately many more Shared Service Centres investments than Asia. This is part of a recent phenomenon of corporations opting to 'near-shore' (in CEE) as opposed to 'far-shoring' (in Asia). It also hints at a related phenomenon whereby companies are investing closer to home and using these facilities for more complex business processes, such as HR, treasury, real estate, etc.<sup>1</sup>

**The range of functions that are being near/off-shored to CEE is growing in complexity at a faster pace than in Asia:** R&D, software development, HR, more complex finance and accounting processes, etc. This reflects the growing maturity and adaptability of CEE as a labour market and its business climate. Cost arbitrage, while still an important consideration, is no longer given the highest weighting in the decision-making hierarchy.

**Companies looking still for aggressive cost arbitrage opportunities are left with two options: far-shoring to Asia or looking at third tier locations** where they would have to pioneer the labour and real estate market, often with a limited number of real estate options in which to house operations.

**The rise of mid-cap firms:** mid-cap companies are globalizing their footprints through targeted small scale investments. This means that locations which have been underinvested in by multinational companies are being targeted by mid-caps.

## Poland

**Poland has a maturing market. Companies view Poland as a long-term investment destination in which to settle, expand and evolve their businesses.** They do not simply value Poland as a cost attractive location. Many, if not most, shared service centres are now managed entirely by native Poles, while employees thereof are ambitious and want to develop and grow within the organisation.

**Employment in the modern business services sector<sup>2</sup> in Poland has grown in recent years by 20% per annum and is expected to continue at the same growth level in 2013, according to ABSL.** As of the middle of 2013, Poland's 400+ business centres employed more than 110,000 people and constituted approximately 40% of the employment in the modern business services sector in CEE. That number is expected to reach 115,000 to 120,000 by the end of 2013.<sup>3</sup>

New investments, as well as re-investment in existing centres, will help promote that growth. This is proof of the quality of the services delivered by those centres and investors' confidence in Poland.

**The number of cities now presenting themselves as attractive investment locations for the modern business service sector in Poland has grown significantly.** Currently, cities put a great deal of effort into ensuring that investments will bring sufficient benefits which justify further investments.

**Scale and size of operations.** In recent years, the level of headcount which ensures profitability and manageability for a project was around 200 new job places. At present, projects envisaging 80 to 90 new jobs are not uncommon. There will be a refocusing on increasingly complex services.

**Numerous 'fresh' graduates in a chosen location are no longer a prerequisite** for this kind of investment. The availability of skilled and experienced professionals who have managed to gather expertise as a result of having been active in their profession for a good few years is becoming important.

## Ranking Poland

Poland has 3.4% of all global outsourcing/offshoring jobs, ranking **1st in CEE, 2nd in Europe (all) and 6th globally.**<sup>4</sup>

Poland is **3rd** in a ranking of **destinations for global service centres** by the Hackett Group. Together with China and India, Poland was indicated as one of the best places for Business Services investment projects. In the latest report, the company predicts that there will be even more investments from the sector coming to Poland.

Poland was the only CEE country to be described as a **"mature market"**, together with Brazil, China and India, in the latest report from the Everest Group.

Poland was ranked by global managers as the world's **13th best host economy for FDI**. The significant investment attractiveness of Poland has been reflected by the UNCTAD's World Investment Prospects Survey for 2010-2012.

<sup>1</sup> Source: fDi Markets from the Financial Times, 2003-13; FDI inflow of greenfield projects for Shared Services, Technical Support and Customer Contact.

<sup>2</sup> Companies with foreign capital.

<sup>3</sup> ABSL: Association of Business Service Leaders.

<sup>4</sup> Source: fDi Markets from the Financial Times, 2003-13; FDI inflow of greenfield projects for Shared Services, Technical Support and Customer Contact.

## Business Environment

**Poland**, with its population of 38 million people, is one of the most rapidly growing markets in Europe and enjoys a stable political climate. A little over 20 years, Poland now stands on the brink of joining the 20 largest economies in the world.

**Highly attractive for investments.** Poland has become one of the most vibrant and thriving business locations in Europe. FDI has been critical to Poland's economic development since the early 1990s. FDI inflow has been a key driving force behind the country's economic restructuring and modernization. Poland's attractiveness for FDI remains strong, despite growing competition from other emerging countries. Poland's significant attractiveness for investment has been reflected in the most recent UNCTAD World Investment Prospects Survey, the report for 2010-2012, where Poland was ranked by global managers as the world's 13th best host economy for FDI.

**Innovation** is another reason for Poland's success. Poland became a trusted partner for foreign businesses, especially due to the creativity in working out new solutions and work attitude. As a result, more complex and advanced businesses were attracted to Poland, underpinned by the availability of a skilled labour force.

The strong integration of the modern services sector in Poland and the embedded know-how, especially with regard to advanced and complex services, are key for further expansion of this sector in Poland. A wide range of supporting services are emerging or expanding, including for instance, business continuity centres and datacentres, which can strengthen the sector during its growth.

**Substantial efforts are underway to improve the country's business environment.** Poland was the "top performer" according to *Doing Business* 2013, moving up 19 places. In the National Reform Programmes (NRP), the Polish government will focus on action aimed at catching-up and building new competitive advantages in three priority areas: (1) infrastructure for sustainable growth; (2) innovation for smart growth; and (3) activity for inclusive growth.

**Declining complexity of doing business: regulatory structures in Poland are fully harmonizing with EU norms.** Reducing regulatory risk is good for business in the long term. In the short term, lots of change – albeit positive change – is tough to manage in terms of compliance. Tax regulation in particular is worth mentioning. That said, the landscape with regard to investment incentives in CEE could become more complex with the introduction of the EU financial framework for 2014-2020.

**Transparency Index.** According to the latest Global Jones Lang LaSalle Real Estate Transparency Index, Poland is considered to be a transparent market and is ranked 19th globally. This indicates that Poland has transparency levels comparable to Western Europe and offers a business friendly environment.

*"We are creating a dual office arrangement between Krakow and Euroclear Bank's headquarters in Belgium for business continuity purposes.*

*We selected Krakow primarily because of the large pool of well-educated university graduates with European language skills and because we are able to use a European regulatory passport to set up our branch in Poland."*

**Frédéric Dirickx Deputy CEO – Operations Director  
Euroclear Bank SA/NV – Polish branch**

**Support.** Companies which are considering starting operations in Poland can expect support and assistance from institutions such as the Polish Information and Foreign Investment Agency (PAIIZ), local governmental agencies focusing on particular parts of the country, and a number of international advisory companies. Moreover, as Poland is an established modern business services location, the Association of Business Services Leaders (ABSL) in Poland was founded in 2009 to support the dynamic growth of the business services sector in the country.



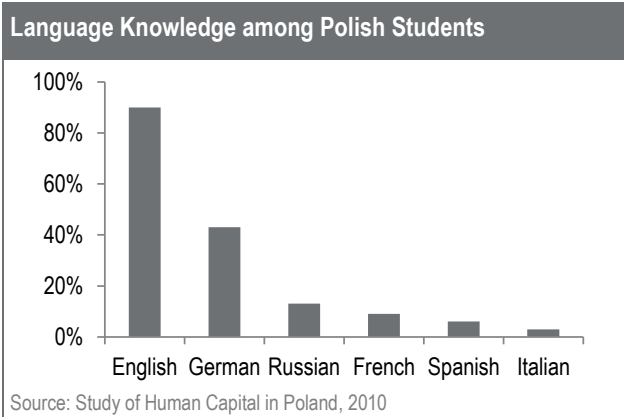
## Labour Market

**Growing number of experienced employees.** The modern business service sector employs 110,000 employees (as of the middle of 2013), spread over more than 400 centres across Poland. This has resulted in a growing number of experienced employees within the sector: 31.4% of the 1,641 respondents in a recent Poland survey by Hays Poland indicated that they have more than five years of experience in the service centre environment.

**Growing number of skilled graduates.** Poland offers a significant number of university graduates. According to the latest available statistics, in 2011 their number was over 492,600. This amount has been on the rise for several years and has gone up by 25% over the last five years.

The number of graduates with regard to the key courses of study from the perspective of the modern business services sector also looks promising. In 2011, about 121,700 people graduated with degrees in business and administration, 28,110 with degrees in engineering and more 15,000 with degrees in computer science. Among the most rapidly growing areas was engineering: the number of engineering graduates was up by almost 25% as compared to 2010.

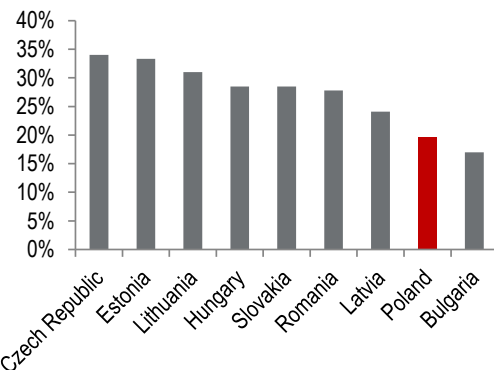
**Wide diversity of foreign language knowledge (>30).** As far as foreign languages are concerned, Polish students provide a very good talent pool, as shown by the graph below. Additionally, there are numerous linguistic courses on offer, including niche languages such as Dutch, Danish, Finnish, Hindi and Chinese.



When discussing availability of skills, one must not forget about employees who already work in the modern business services sector: they are an important experienced talent pool. A survey carried out by ABSL showed that in the service centres in Poland **34 languages are used**. 96% of the centres use English and 86% use German. Also, 10% of the companies that took part in the survey use 20 or more languages.

**The employer's contributions in Poland are among the lowest in Central Eastern Europe.** The gross salary of an employee is only a part of the labour costs incurred by the employer. As well as salary, the employer has to pay contributions for social insurance (including contributions for retirement, disability and accident insurance) and to the Labour Fund and the Guaranteed Employment Benefit Fund.

### Employer's Contributions in Central and Eastern Europe



Source: Social Security Programs throughout the World: Europe, 2010

When analysing the levels of remuneration in major centres, it is not possible to indicate cheaper or more expensive locations in Poland. In a knowledge-based industry, the costs of employment are strictly related to the accessibility of specific skills in the city and its surroundings, e.g., command of a required foreign language, saturation of the local market, or the likelihood of attracting required talents from other regions.

### Salaries in the Business Services Sector (\*)

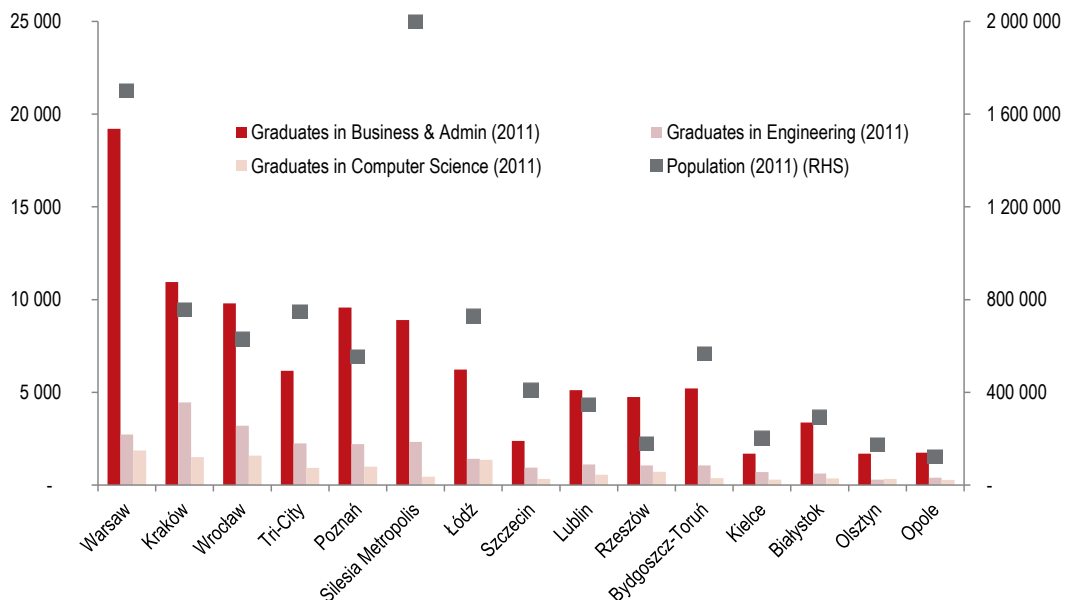
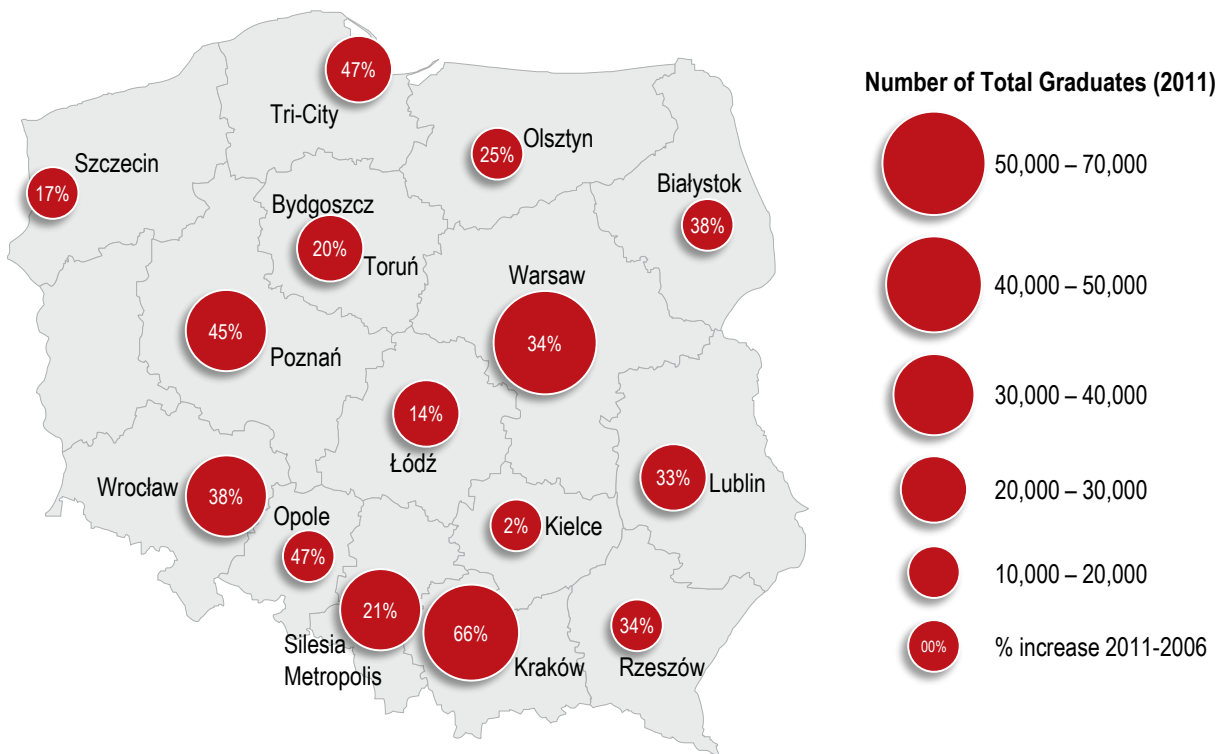
Gross monthly salaries in EUR	Poland		
	Min	Average	Max
<b>F&amp;A Processes, Accounts Payable / Accounts Receivable</b>			
Junior Associate (0 - 1 year of exp.)	575	675	850
Associate (1 - 2 years of exp.)	725	900	1100
Team Leader (5 - 15 FTEs)	1575	1800	2225
<b>F&amp;A Processes, General Ledger</b>			
Junior Accountant (1 - 2 years of exp.)	675	850	1150
Accountant (2 - 3 years of exp.)	950	1200	1375
Team Leader (5 - 15 FTEs)	1675	2000	2475
<b>CS Processes</b>			
Junior Specialist (no previous exp.)	575	725	850
Specialist (1+ years of exp.)	725	900	1000
Team Leader (5 - 15 FTEs)	1425	1750	1950
<b>IT Processes</b>			
1st Line Support (0 - 1 year of exp.)	675	850	1050
2nd Line Support	1050	1375	1800
Team Leader (5 - 15 FTEs)	1675	2000	2375
<b>Managerial level</b>			
Process Manager	2400	3300	4300
SSC / BPO Director	6000	8400	12000

Source: Hays Specialist Recruitment 2013; Exchange rate: 1 EUR = 4.21 PLN;  
Note: (\*) Salary levels are only applicable to those with English language skills.

**Great mobility.** Another of the main characteristics of the modern business services sector employees is mobility. In the Hays' survey more than half of respondents (57.7%) said they had moved to another city for a job, while 84.6% would move if the right opportunity arises. We can also observe a trend where less work experience is directly correlated to a willingness to relocate.

**Low attrition rate.** Poland also has a low attrition rate: the average is 15%. However, the rate can be as low as 5% for centres with more advanced processes which are more attractive for employees, hence causing them not to switch jobs so often.

**Number of Graduates by City Subregion in the Established and New Office Locations**

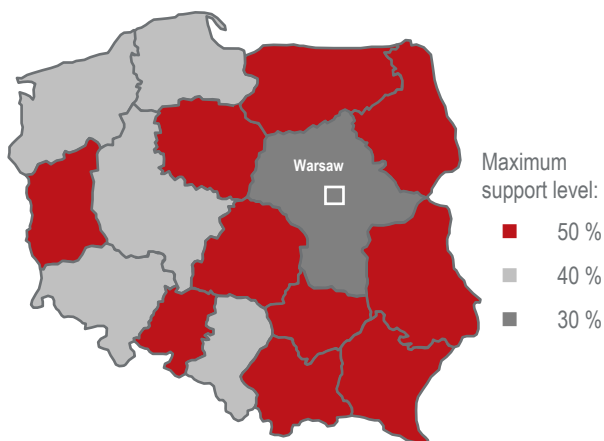


Source: National Statistical Office, most recent data is as from 2011

## Grants & Incentives

Investment incentives available to investors<sup>5</sup> have to be granted in accordance with the regulations on state aid for business entities. It is possible to combine various forms of state aid; however the total amount of tax exemptions or financial grants provided to an investor cannot exceed the maximum permissible amount of regional state aid (which is calculated by multiplying the qualifying costs by the maximum aid intensity in the region). Qualifying costs could be: costs of investment outlays (aid for an initial investment) or the two-year labour costs of newly hired employees (aid for job creation), depending on which of those is higher. Regional aid for an initial investment may be granted along with aid for job creation, provided that the overall amount of aid does not exceed the maximum permissible amount of aid.

### Map of regional aid intensity (2013)



Investors from the **business services sector** in Poland can benefit from different types of **state aid**, including, inter alia, corporate income tax (CIT) exemption in the Special Economic Zones (SEZ) and governmental cash grants.

Also available are **incentives from EU funds** and **EU R&D programs** for Polish registered entities (including the Polish arms of foreign investors) such as: Innotech – Intech R&D project support; Corporate Income Tax relief for the acquisition of new technology; Research and Development Centre (RDC); the 7th Framework Programme of the European Union. A new allocation framework for EU funds for 2014-2020 is currently under discussion between the EU and its member states and will be announced by the end of 2013. This might potentially change the incentive landscape in Europe.

<sup>5</sup> Aid for an initial investment or the creation of new jobs related to an initial investment.

### CIT exemption

CIT exemptions are available for investors operating within SEZs based on a permit to run their business issued by the given SEZ's authorities. The value of tax holidays can amount to the limit for the aid available for a given investment project.

**The basic condition for tax exemptions in SEZs** is that the investor has to commit to a new investment of at least EUR 100,000 and obtain a permit to conduct business activity in the SEZ issued by management board of the given SEZ. In order to receive an SEZ permit, an investor may either enter an existing SEZ or apply for an SEZ extension and apply for the SEZ permit afterwards. The board of SEZ applies to the Ministry of Economy for obtaining permission to establish the zone.

SEZ permits are valid until the end of 2020: according to the currently binding regulations, that is the date on which SEZs will cease to exist. At present, however, legislative work is underway in order to extend the existence of SEZs beyond that date i.e. until at least 2026.

### Government Grant

State aid is granted to and designated for investments which are considered crucial to the Polish economy, including investments in the '**priority**' sectors, one of which is modern services (i.e. **the business service sector, IT, etc.**).

Such subsidy is granted on the basis of an agreement signed between the given investor and the Minister of Economy. The Polish Information and Foreign Investment Agency is the operator of this form of public aid.

Projects from **the business services sector** which involve the creation of at least 250 new jobs or investment expenditure amounting to PLN 2 million may apply for job creation grants. In the case of **R&D projects**,<sup>6</sup> the investor is required to create a minimum of 35 new jobs for workers with higher education and to spend a minimum of PLN 3 million in expenditures. **The maximum amount of support** varies from PLN 3,200 to PLN15,600 per job created. The amount of money granted depends on four factors: the percentage of employees with higher education; location; processes; and other factors (such as the brand of the company, co-operation with universities etc). The flexibility in the number of jobs created is a maximum of 10%. If the company commits to 250 new jobs, the flexibility is 0%.

<sup>6</sup> Engineering and R&D centres, software development, Knowledge Process Outsourcing centres, e.g. knowledge management, high-risk decision-making, highly specialized IT and financial processes characterized by extensive 'know-how' on the service provider side, R&D work in: production and product engineering, environmental engineering, biotechnology, pharmacy, electronics, mechanics, mechatronics, chemistry, energetics, aviation, etc.



## Connectivity

*Well connected to major cities in Europe within two to three hours' flying time  
Favourable time zone allows for global communication*



Source: Information based on flight schedule of the Polish airports (excluding charter and cargo flights ) May 2013

*“HP Global Business Service Center was established in **Wrocław**, in 2005, as one of the first business services sector investments in Lower Silesia. HP GBC provides services for international companies from different sectors in both Europe and the USA.*

*HP GBC Wrocław also supports administrative processes for other HP units in the areas of finance, accounting, payroll, marketing, sales and supply chain management. Additionally, the unit continues to expand its portfolio to include advanced financial, accounting, marketing, and business analysis services. These also include Knowledge Process Outsourcing – KPO. The decision to locate the centre in Wrocław was made by the global HP management board after a thorough analyses of both Poland’s and Wrocław’s assets.*

*Factors taken into account included access to a **highly qualified workforce with foreign language competences**, the **proximity of the organization’s European clients**, **development potential**, and the **authorities’ willingness to cooperate with international investors**.*

*The success of Hewlett-Packard ’s Wrocław services unit – one of the most advanced business services centers in Europe – as well as the **great potential** of Polish specialists were the main reasons why the organization decided to extend the scope of the operations and processes it handled in Poland.*

*Moreover, these assets had a favourable impact on the decision to open the second HP centre in Poland, this time in **Łódź**. This investment has further strengthened Poland’s position as the leading HP business services destination in the EMEA region (Europe, Middle East and Africa).*

**Agnieszka Orłowska, Managing Director, HP Global Business Center**

## Real Estate Market

**The Polish office market is developing quickly**, with the 1 million m<sup>2</sup> of space currently under construction across Poland showing that this is one of the most dynamic markets in Europe. Poland's modern office stock grew by 10% over the year, reaching a total of 6.4 million m<sup>2</sup> in Q1 2013,<sup>7</sup> which makes it the largest office market in Central and Eastern Europe.

**Poland offers a wide range of office locations.** No other country in Central and Eastern Europe is able to offer so many potential locations to the modern business service sector and each of those has its own characteristics and features. The large number of locations is also key for companies that want to expand or are looking to diversify. Established office markets and the largest new locations are both analysed in this section.<sup>8</sup>

**High quality of office space.** Both international and domestic developers are well aware of the specific space requirements of modern business services sector tenants. Most office buildings meet A-Class standards (raised floors, efficient air conditioning and ventilation systems, BMS, fibre cable connectivity, possibility to freely choose a telecomms operator, etc) and have flexible layouts and effective floorplans so that expansion or internal re-arrangement can be done efficiently.

**Availability of office space: wide choice of options.**

Companies which are looking to occupy office space should take into account the immediately vacant space in existing buildings

as well as available space in buildings under construction in order to have a full picture of the leasing market.

The high level of construction activity indicates that more quality space will come onto the market in the short to medium term. The strong developers activity in Warsaw has resulted in a wide choice of available space, especially in non-central locations, which are the main locations for the modern business services sector in the city.

There is no common picture for the established Polish regional office markets, as is shown on the graph. Kraków, for instance, currently has a low level of immediate vacant space but a relatively high level of construction activity. The picture is very different in Szczecin, a smaller office market where the high level of immediate available space has put a hold on new construction. In new locations office supply is more limited, especially when looking for areas larger than 1,000 m<sup>2</sup>.

**Rents.** Headline rents for prime quality buildings in established office markets in Poland range between EUR 11 and EUR 16 per m<sup>2</sup> per month. In new or emerging markets, rents are even more attractive, ranging between EUR 8 and EUR 11 per m<sup>2</sup> per month. In general, rents are relatively stable but the high level of construction activity may result in more tenant attractive conditions in certain markets.

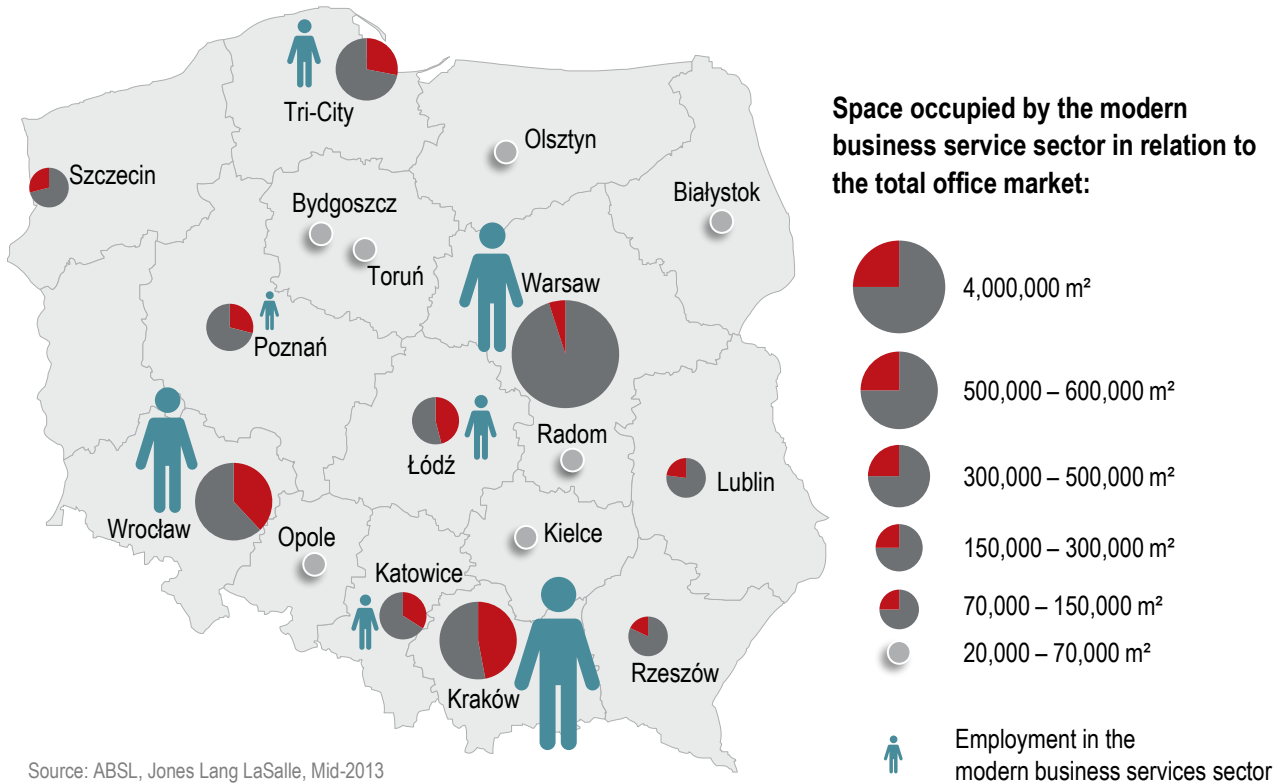
### Market practice

	Non-Central Warsaw	Established Regional Markets: Kraków, Wrocław, Poznań, Katowice, Tri-City, Łódź, Lublin, Szczecin	New Locations: Rzeszów, Kielce, Białystok, Opole, Toruń, Olsztyn, Bydgoszcz, Radom
<b>Headline rents</b>	EUR 14.5-15 / m <sup>2</sup> / month	EUR 11-16 / m <sup>2</sup> / month	EUR 8-11 / m <sup>2</sup> / month settled in PLN
<b>Service charges</b>	approx. EUR 4-5 / m <sup>2</sup> / month; typically settled in PLN	approx. EUR 3.5-4 / m <sup>2</sup> / month; typically settled in PLN	approx. EUR 2-3 / m <sup>2</sup> / month; settled in PLN
<b>Rental basis</b>	paid monthly in advance with rents denominated in EUR but paid in PLN; full rent is typically payable for common areas	paid monthly in advance with a balance between EUR-denominated rents and PLN-denominated rents	
<b>Lease length</b>	typically five-year leases, three-year leases are rare and usually not available for new buildings		typically short leases or signed for undefined period of time (in some cases lease length practice is similar to that in established regional markets)
<b>Security of the lease</b>	bank guarantee or cash deposit equivalent of three months' rent, service charges, and car parking fees, all increased by VAT		
<b>Rental increase</b>	annually according to Consumer Price Index (CPI) European for EUR-denominated leases or GUS for PLN-denominated leases		
<b>Repairs</b>	internal, tenant; external/structural and common areas, landlord, although recovered through the service charge		
<b>Insurance</b>	the landlord covers the costs of building insurance (recovered through the service charge), the tenant pays for insurance of own premises, contents and civil liability		
<b>Reinstatement</b>	not common practice		
<b>Incentives</b>	rent-free period depending upon the size of the leased area and lease length, additional fit-out contribution, transfer of Capex exceeding fit-out contribution spread over the lease term		limited incentives (rather fit-out contribution than rent-free periods), no common practice on the markets

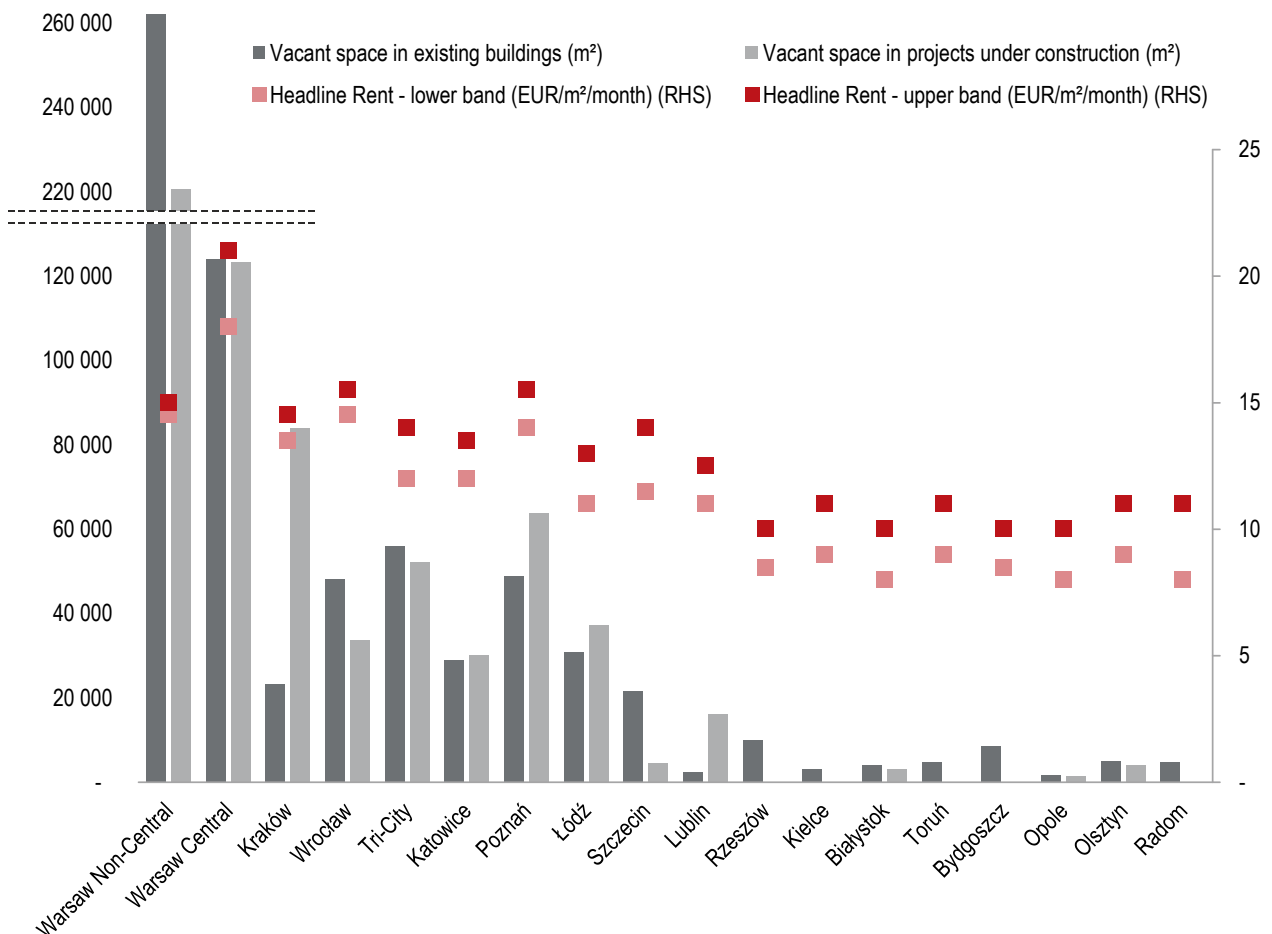
<sup>7</sup> Source: Poland Office Market Profile Q1 2013, on [jll.pl](http://jll.pl) or [officefinder.pl](http://officefinder.pl)

<sup>8</sup> City specific office market reports are available on [jll.pl](http://jll.pl) or [officefinder.pl](http://officefinder.pl)

## Size of the Modern Business Services Sector in terms of Office Space and Employment



## Office Availability and Headline Rents by City



## Case Study

# Samsung R&D Institute Poland: a showcase of smart growth.



**A bit of History** One of the largest and fastest growing modern-technology R&D centres in CEE is based in Poland: Samsung R&D Institute Poland grew from eight employees to more than a thousand in ten years.

2000	Samsung Electro-Mechanics SW Center Inaugurated (Digital Broadcasting Development, Field Tests)
2001	Samsung Electronics Inc. (Europe STB System Development)
2005	DTV Lab Inauguration
2007	Mobile Lab Inauguration
2010	Launch of SmartTV, Internet TV, Android Competence Center
2011	Opening of the Poznań Office
2013	Opening of the Łódź Office

Samsung R&D Institute Poland is part of Samsung Electronics.

**University relations** Samsung chose Poland mostly due to the high education level and the opportunity to work with the best engineers. Co-operation with best academic institutions is the most vital factor for the high-tech industry. Since its establishment, Samsung R&D Institute Poland has played a crucial role in a number of ventures run in co-operation with research units and universities in Poland and abroad.

The centre has co-operated with academic institutions within the scope of numerous projects and scientific consortia, both Polish (the PARP project, NCBR) and European (FP7 projects). The co-operation with research units also involves training, support and professional, technological, and scientific advice in the scope of numerous competences. Whilst choosing the research projects on which to focus, Samsung first of all evaluates their innovation and creativity. In addition, they make sure that the results of the work are of a high standard and quality.

**Business Partnership** Because of the wide range of its interests, the Samsung R&D Institute Poland is open to co-operation with other enterprises and keen to exchange knowledge and experience with its business partners to serve their mutual interests. The co-operation also takes the form of common participation in European research consortia. Together they research, implement and standardize technologies with the most innovative R&D centers in the European Union.

# Modern Business Centres in Poland

Selection of modern business centres in Poland from the 400+ centres of companies with foreign capital operating across Poland

## Warsaw

Accenture  
Avon EMEA Finance Service Centre  
Citigroup  
Procter & Gamble  
Samsung  
**Goldman Sachs**  
**JDA**  
**Mettler-Toledo**

## Kraków

Capgemini  
IBM Software LAB  
Motorola Solutions – Software Centre  
Shell SSC  
State Street Services  
**Accenture**  
**Brown Brothers Harriman**  
**EDF**  
**Euroclear Bank**  
**Perkin Elmer**

## Wrocław

Capgemini  
Credit Suisse  
HP GBC  
Nokia Siemens Networks  
Volvo  
**Catlin**  
**Dolby**  
**Luxoft**  
**Qatar Airlines**  
**Qiagen**

## Tri-City

Intel  
BPH  
Thomson Reuters  
Lufthansa Systems Poland  
Transcom  
**Bayer**  
**Metsä**  
**OIE Support**  
**WNS**

## Poznań

Franklin Templeton  
GlaxoSmithKline Service  
MAN  
McKinsey  
Roche  
**Carl Zeiss**  
**DFDS**  
**Rule Financial**

## Katowice Aggl.

Capgemini  
ING Services Poland  
Mentor Graphics  
PWC  
Rockwell Automation  
**Unilever**

## Łódź

Fujitsu Services  
Infosys  
Nordea Bank  
Rule Financial  
TomTom  
**HP**  
**Samsung**  
**Sii**

## Szczecin

Arvato Services  
Coloplast  
Stream Global services  
Tieto  
UniCredit  
**Genpact**  
**Metro Services**  
**Mobica**

## Lublin

Asseco Business Solutions  
Genpact  
Orange

## Bydgoszcz

Alcatel-Lucent  
Atos  
Livingston  
SDL  
Vivid Games

## Toruń

Itella  
Grant Thornton

## Olsztyn

Citigroup  
Orange  
Transcom

## Białystok

Qburst  
Intrum Justitia  
Transition Technologies  
**SMT Software**

## Rzeszów

ACP Pharma  
Carlson Wagonlit Travel  
Hamilton Sundstrand  
Pratt & Whitney  
Soft System

## Kielce

Altar  
Invofer  
Teledirect

## Radom

Europe Calling  
Iron Mountain

## Opole

Capgemini  
Future Processing  
Opta-Data  
PZU Centrum Operacji

## Bielsko-Biała

Avio  
Centrum Finansowo-Księgowe Żywiec  
Cooper Standard European SSC  
Fiat Services

## Białogard

Valassis

## Ciechanów

Contact Center

## Częstochowa

TRW Automotive

## Dębica

Goodyear

## Elbląg

Alstom  
Contact Center  
CSC

## Garwolin

Avon

## Góra Kalwaria

Call Center Poland

## Grójec

Faurecia

## Konin

arvato services

## Krosno

Contact Center

## Mława

LG Electronics

## Piła

Philips  
PZU Centrum Operacji

## Radzymin

Cederroth

## Rawa Mazowiecka

Contact Center

## Sandomierz

Pilkington

## Siedlce

Teleperformance

## Tczew

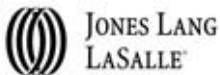
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