

FOCUS ON

Created by **Pro Progressio**

Wrocław





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Wrocław is one of major centers of business services sector in Poland, one with global recognition. The success and maturity of the BSS market in Wrocław continues to make it very attractive for foreign investors. Companies choose it most frequently to locate SSCs or IT centers with a European or global coverage. What distinguishes Wrocław from other Polish cities is a high share of employment in R&D.

What investors cooperating with the Polish Investment and Trade Agency indicate as the main aspect of Wrocław's attractiveness are its strong academic and scientific background that provides access to well-educated staff speaking different foreign languages. The quality of education is not the only advantage of Wrocław's universities. They are distinguished by intensive cooperation

with business, which creates a favorable investment climate in the city, stimulating the transfer of know-how. Diffusion of innovation is boosted by two important research centers operating there: PORT – Polish Center for Technology Development, part of the Łukasiewicz Research Network, as well as Wrocław Technology Park.

Wrocław's position as a good place for startups is also gaining importance. According to the latest Startup Blink Startup Ecosystem 2020 ranking, it was ranked 3rd in Poland and 171th in the world (with an increase of 36 positions compared to 2019) in terms of the activity of startup ecosystems. This is yet another aspect that proves high innovativeness of Wrocław – this translates into a huge potential for further growth and attracting new investments.



Wiktor Doktor
CEO, Pro Progressio

Wrocław – the Polish capital of IT and one of the key Polish cities for the development of the modern business services sector. It is in the capital of Lower Silesia that the BSS sector has been developing continuously for two decades already, and the city, through the development of office infrastructure and the availability of qualified staff, is one of the key locations for BSS-type operational centers in Europe.

This is where operational centers have, among others 3M GBS, Soft-Serve, HP, BNY NY and many other international organizations. Wrocław has been proving for years that it is a good home for IT companies as well as large financial and accounting centers.

I invite you to read Focus on Wrocław, a report in which we show the most important information related to the development of the BSS industry in this beautiful city.

292,8 km²

Town area

59,8%

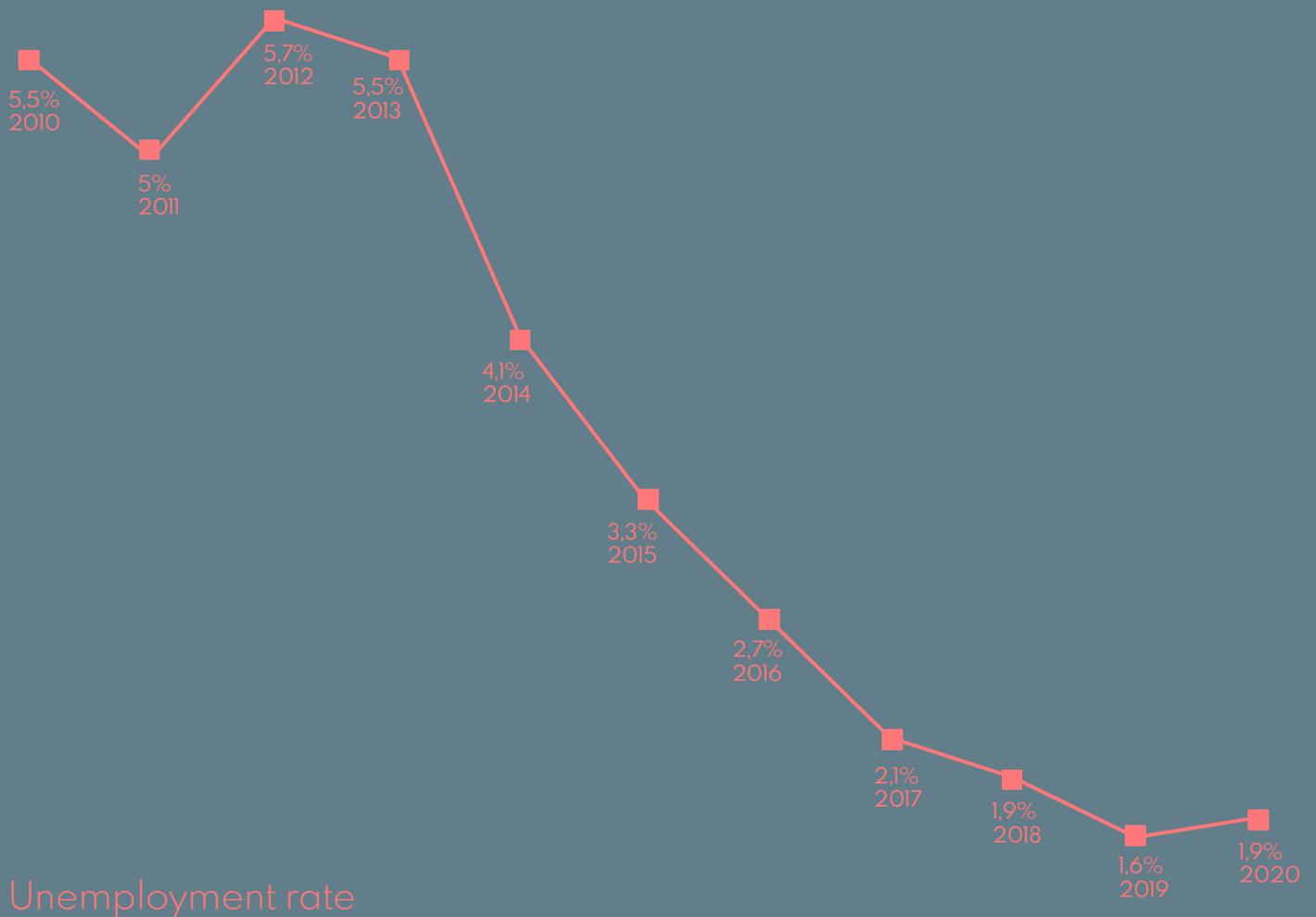
Recreational green area

642 900

Population

1 200 000

Population of the Wrocław Agglomeration



28



Universities

11 public universities

17 private universities

27 800

110 881

foreign students
6 675

2000



Kindergartens

150 public kindergartens

50 private kindergartens

Primary schools:

138

44 415

6 777

SUBJECTS*

philology (foreign languages)

1 596

28 979

administration, business and law

7 403

High schools:

68

3 338
 11 919

8 202

IT/ICT

1 323

13 895

engineering and technology

3 931

305

logistics

60

Technical schools:

27

6 135

architecture and construction

1 748

graduates

students

* data for Dolnośląskie region

/Transport

17 car rentals



10 taxi companies



114 taxis

PLN 4,5 initial charge

PLN 1,8 cost per 1 km

23 tram lines



94 bus lines



78 day bus lines

16 night bus lines



Public transport tickets

PLN 3,4 normal ticket price

PLN 11 one-day ticket price

PLN 90 monthly ticket price

 **2000** city bikes

1200 km length of bicycle routes
200 city bikes stations
PLN 2-4 / h rental cost (20 min free)

 **280** scooters for rent

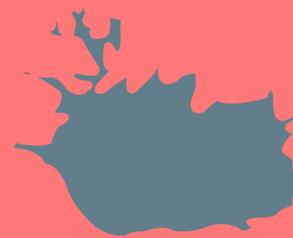
Distance from Wrocław to other cities:

Warsaw	.....	348 km
Bydgoszcz	.....	281 km
Poznań	.....	180 km
Szczecin	.....	373 km
Lublin	.....	464 km
Łódź	.....	217 km
Katowice	.....	195 km
Kraków	.....	272 km
Kielce	.....	339 km
Rzeszów	.....	437 km
Gdańsk	.....	453 km
 Berlin	.....	344 km
 Hamburg	.....	628 km
 Prague	.....	275 km
 Minsk	.....	886 km
 Kiev	.....	1131 km
 Moscow	.....	1588 km
 Vilnius	.....	815 km



Roads

2 highways
1 express way
4 national roads
15 regional roads



Wrocław Airport

 Alicante	 Malaga
 Amsterdam	 Malta
 Athens	 Manchester
 Barcelona Girona	 Milan Bergamo
 Bari	 Munich
 Birmingham	 Naples
 Bologna	 Newcastle
 Bristol	 Odessa
 Brussels Charleroi	 Oslo
 Cagliari	 Oslo Torp
 Chania	 Palermo
 Kharkov	 Palm
 Cork	 Paris
 Doncaster Sheffield	 Paris Beauvais
 Dortmund	 Podgorica
 Dublin	 Porto
 Dusseldorf	 Reykjavik
 East Midlands	 Rome Ciampino
 Edinburgh	 Shannon
 Eindhoven	 Stockholm Skavsta
 Faro	 Tel Aviv
 Frankfurt	 Tenerife
 Gdańsk	 Warsaw
 Glasgow	 Zadar
 Kiev Borispol	 Zaporozhye
 Kiev Zhulany	 Zurich
 Copenhagen	
 Corfu	
 Kutaisi	
 Leeds / Bradford	
 Liverpool	
 Lisbon	
 London Luton	
 London Stansted	
 Lviv	
 Madrid	





● WROCLAW

Distance from the Main Wrocław Railway Station

  27 min 
Airport

  20 min 
Wrocław City Hall
.....  8 min

  21 min 
Wrocław Agglomeration Development Agency
.....  10 min

  8 min 
Economic Development Office
.....  6 min

  21 min 
Main market
.....  7 min

  21 min 
Raławice Panorama
.....  8 min

  29 min 
Ostrów Tumski
.....  12 min

  22 min 
National Museum
.....  8 min

  48 min 
Four Domes Pavilion
.....  11 min

  48 min 
Centennial Hall
.....  10 min

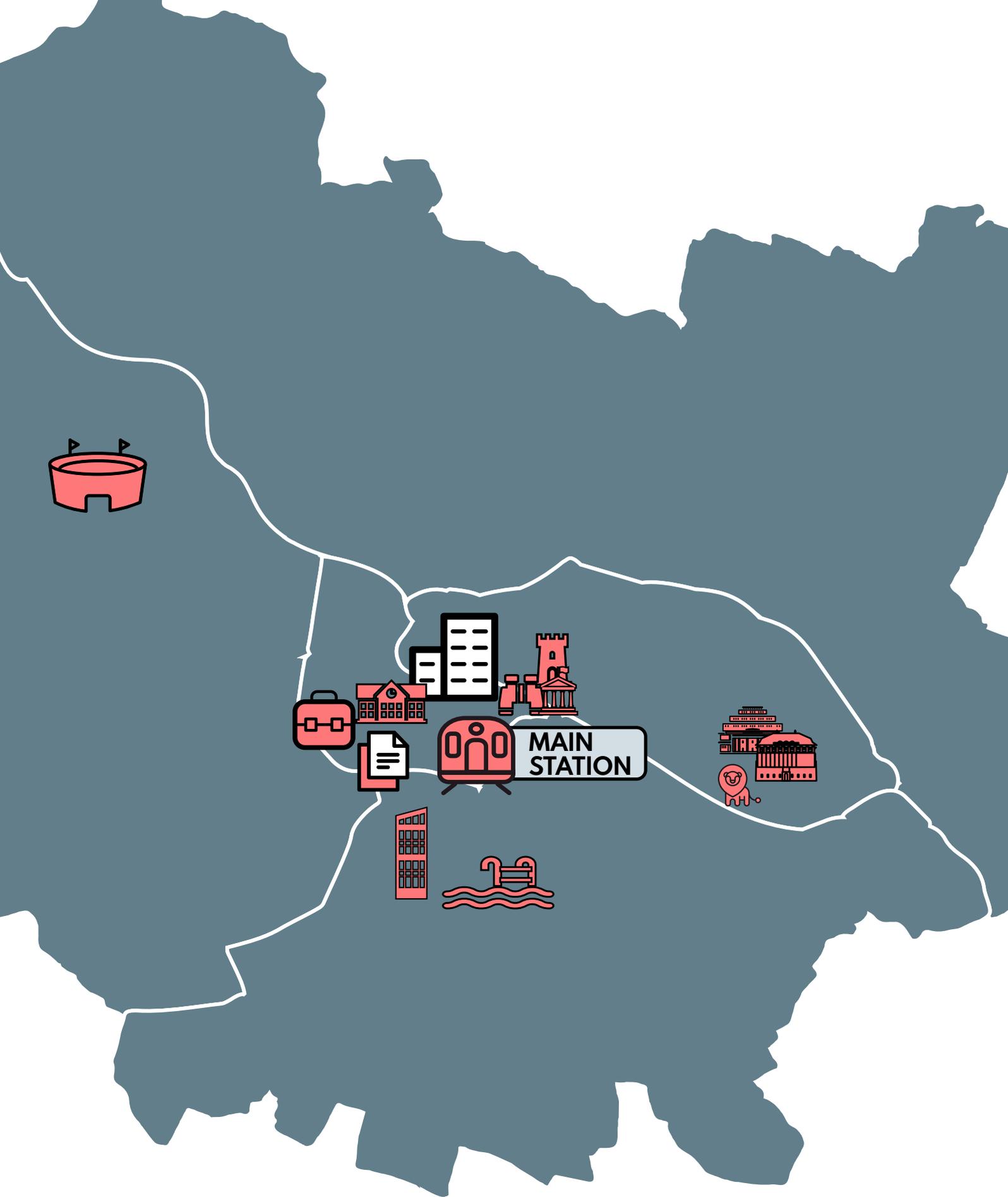
  19 min 
Skytower
.....  7 min

  15 min 
Aquapark
.....  7 min

  46 min 
ZOO
.....  11 min

  25 min 
Stadium





Offices

Total existing A/B+ Class office space	1 186 100 sq m
Total A/B+ Class office space under construction	129 000 sq m
Total A/B+ Class office space planned	326 000 sq m
A/B+ Class office spaces	153
A/B+ Class office spaces under construction	8
Planned A/B+ Class office spaces	23
Minimum rent in A/B+ Class	EUR 13 / sq m / month
Maximum rent in A/B+ Class	EUR 15 / sq m / month
Average services fees in A/B+ Class	PLN 20 / sq m / month

Selected office spaces

BUILDING	ADDRESS	OWNER	EXISTING SPACE
Business Garden Wrocław II	Legnicka / Dąbrówki	Vastint	76 800 sq m
Nowy Targ	Św. Katarzyny / Wita Stwosza	Skanska	19 400 sq m
Carbon Tower	Fabryczna	Cavatina	17 600 sq m
City Forum: City One	Traugutta 43-55	Archicom	11 200 sq m
Cu Office B	Jaworska	Buma Group	10 600 sq m

Warehouses

Total existing warehouse space	2 368 000 sq m
Total warehouse space under construction	198 000 sq m
Total planned warehouse space	1 454 000 sq m
Prime rent in warehouses (city and environs)	EUR 3,00-3,60/ sq m /month

Selected warehouses

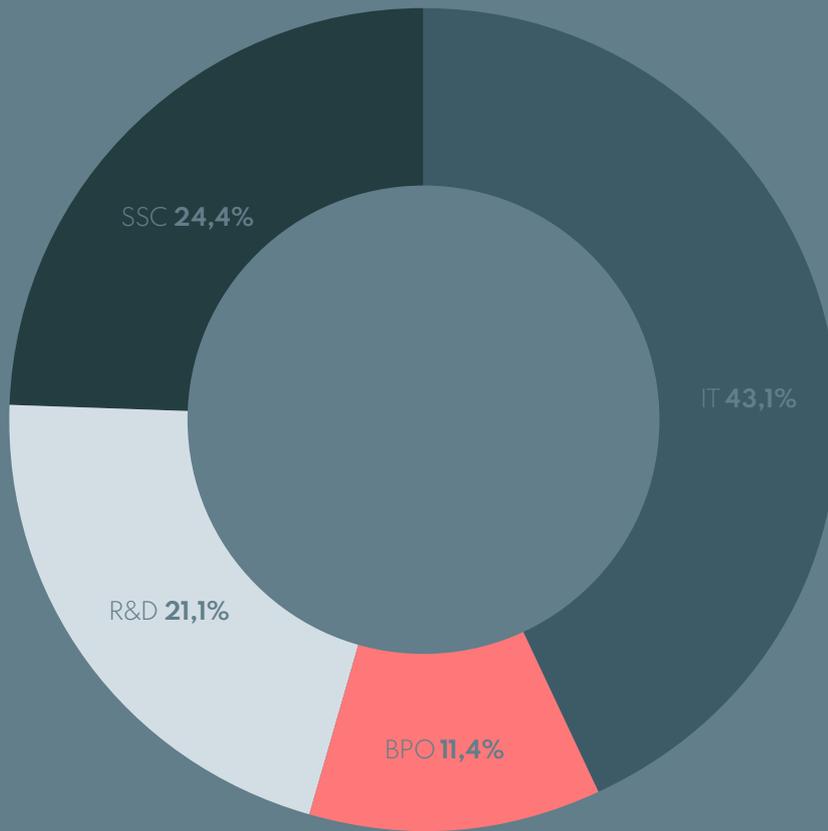
BUILDING	ADDRESS	LANDLORD	EXISTING SPACE	SPACE UNDER CONSTRUCTION	PLANNED SPACE
Prologis Park Wrocław V	Ryszarda Chomicza IIa, Nowa Wieś Wrocławska	Prologis	188 200 sq m	-	74 200 sq m
Panattoni Park Wrocław VII	Logistyczna 8, Bielany Wrocławskie	Panattoni	110 000 sq m	-	38 100 sq m
Hillwood Wrocław Wschód I	Wrocławska 36, Wojkowice	Hillwood	109 000 sq m	-	-
Goodman Wrocław IV Logistics Centre	Kwiatkowskiego 5, Wrocław	Goodman	64 000 sq m	-	-
SEGRO Logistics Park Wrocław	Chomicza, Nowa Wieś Wrocławska	SEGRO	-	29 600 sq m	51 400 sq m

Shopping malls

Number of shopping malls	22
Total existing space	743 480 sq m
Total planned space	10 000 sq m
Total empty space	31 000 sq m
Average rents in prime spaces	EUR 50 / sq m / month

Selected shopping malls

BUILDING	ADDRESS	DEVELOPER	EXISTING SPACE
Wroclavia	Sucha 1	Unibail-Rodamco	64 000 m ²
Magnolia Park	Legnicka 58	NFI Octava/Redis	98 700 m ²
Galeria Dominikańska	Pl. Dominikański 3	ECE	24 300 m ²
Pasaż Grunwaldzki	Pl. Grunwaldzki 22	Echo Investment	52 000 m ²
Aleja Bielany	Czekoladowa 7-9	Inter IKEA	62 000 m ²



Type of operation

Institutions supporting entrepreneurship

- Data Techno Park
- Incubator of Entrepreneurship DAWG
- inQUBE
- Lower Silesian Academic Incubator Of Entrepreneurship
- Lower Silesian Chamber of Commerce
- Lower Silesian Innovation and Science Park
- PORT (Polish Center for Technology Development)
- TwojStartUp Foundation
- Wrocław Technology Park
- Wrocław Agglomeration Development Agency
- Wrocław Regional Development Agency

Outsourcing centres using foreign languages

 Polish: 118	 Estonian: 2
 English: 123	 Latvian: 4
 German: 68	 Lithuanian: 3
 Spanish: 31	 Bulgarian: 2
 French: 37	 Romanian: 4
 Italian: 31	 Slovenian: 1
 Russian: 21	 Croatian: 1
 Hungarian: 9	 Serbian: 3
 Ukrainian: 12	 Greek: 2
 Danish: 7	 Turkish: 4
 Czech: 16	 Hebrew: 2
 Slovak: 5	 African languages: 1
 Dutch: 18	 Chinese: 2
 Portuguese: 13	 Arabic: 5
 Norwegian: 18	 Japanese: 2
 Swedish: 21	other: 2
 Finnish: 12	

Total number of business entities

79 626

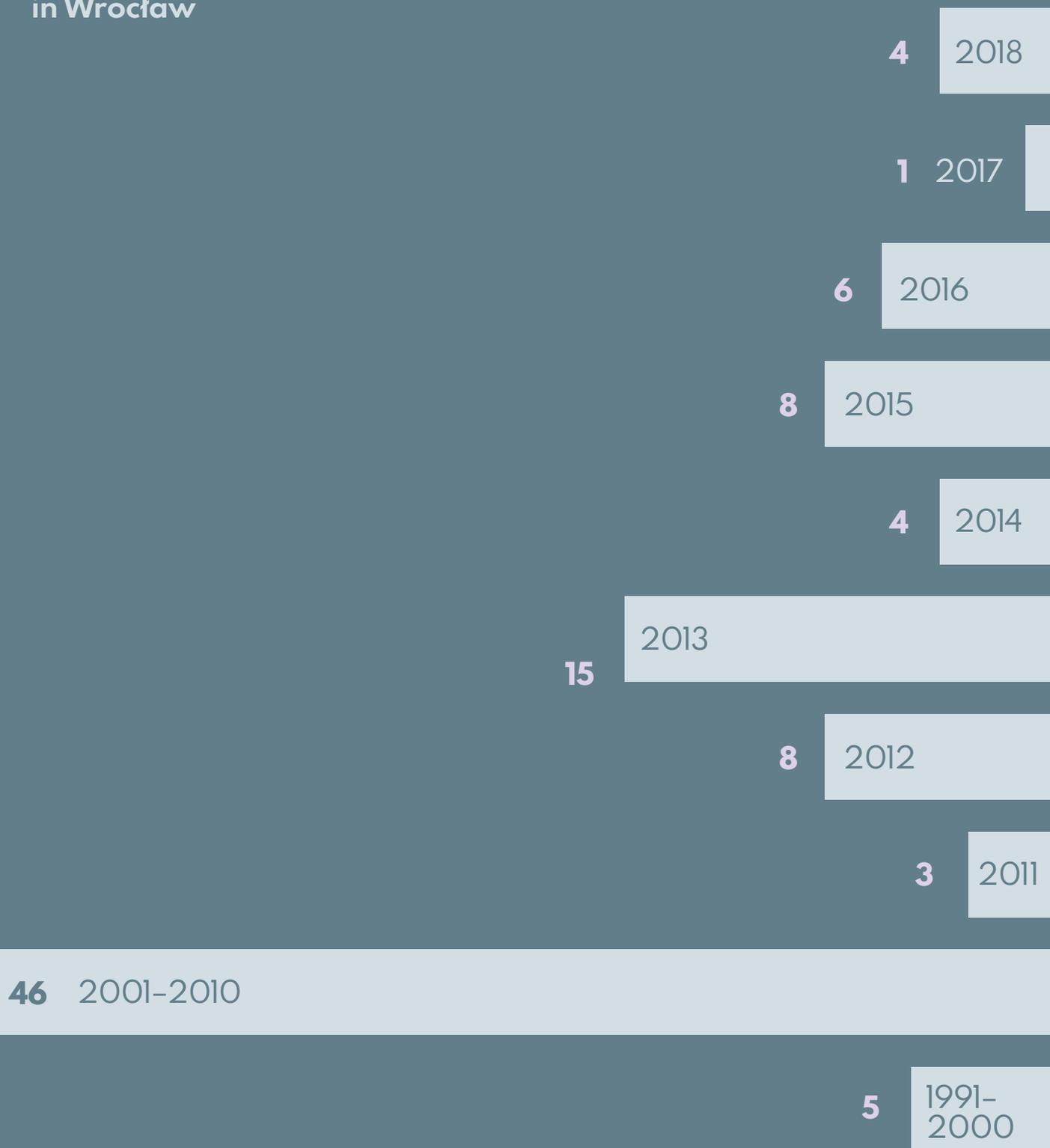
COMPANY	TYPE
3M	SSC
Accenture	IT
Accesto Sp. z o.o.	IT
ACN Communications Polska	BPO
Acturis	IT
Alfa-Net sp. z o.o. sp. k.	IT
Align Technology	R&D
Altimi Solutions Sp. z o.o.	IT
Atos Global Delivery Center Polska Sp. z o.o. Sp. k.	IT
AVID Technology	IT
Axiom Law	BPO
Axxiome	IT
Balluff	R&D
Bank of New York Mellon	SSC
bcf Bright Coder's Factory	IT
Becton Dickinson	SSC
Better Software Group S.A.	IT
Birlasoft	IT
BrightOne	R&D
Call Center Inter Galactica (CCIG)	BPO
Capgemini	IT
Ciklum Sp. z o.o.	IT
Cogniance Poland Sp. z o.o.	SSC
Credit Suisse	SSC
Crisil Global Research & Analytics	SSC
CSS Corp	IT
Data Art.	IT
DeLaval SSC	SSC
Diehl Controls	R&D
Divante	R&D
Dolby Laboratories Poland	R&D

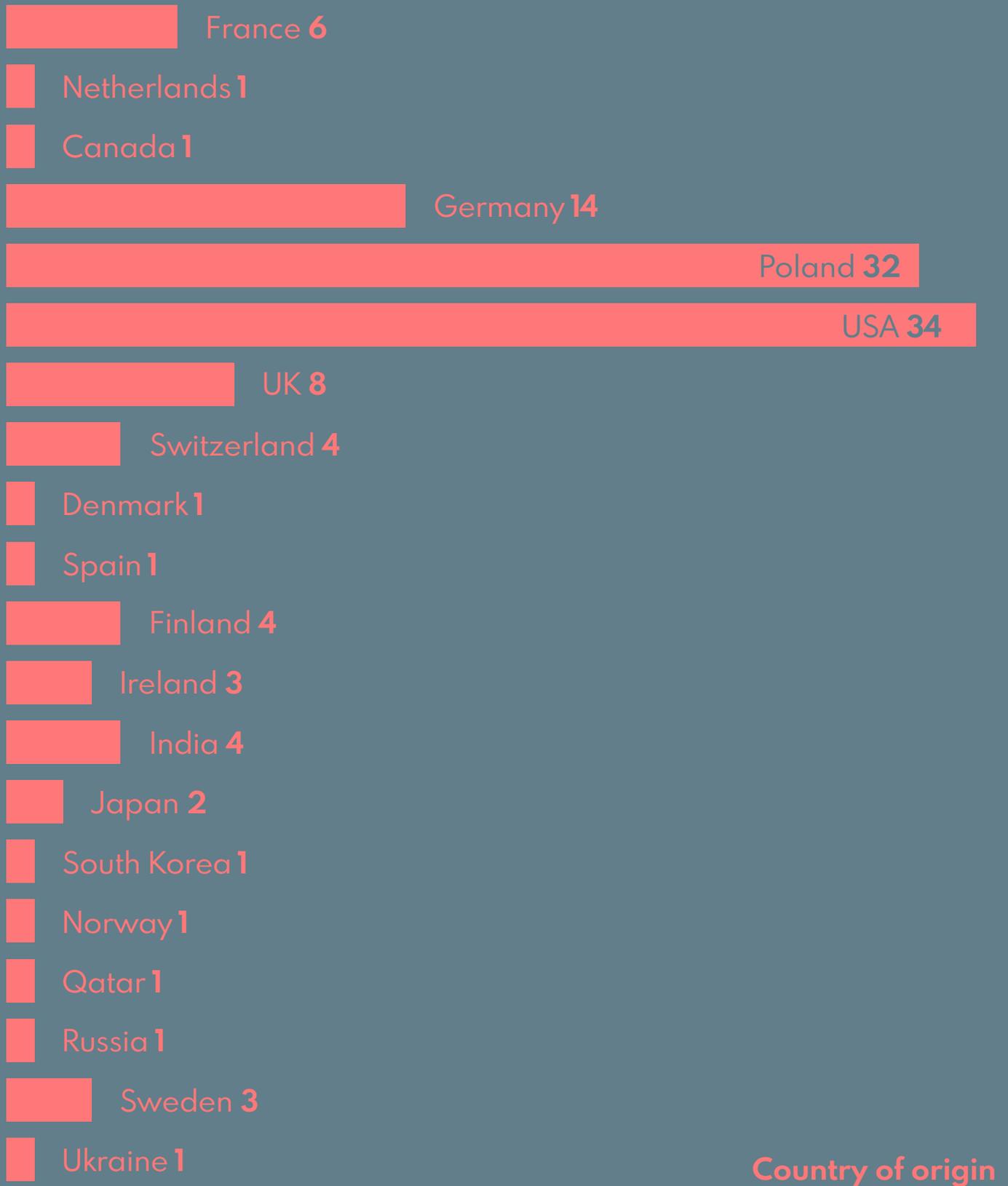
COMPANY	TYPE
DOOK S.A.	R&D
Eagle Investment Systems	R&D
Enabledware	R&D
EPAM Systems	IT
Epiq Systems	BPO
Espotel	R&D
Etteplan Poland Sp. z o.o.	R&D
EY Global Services (Poland)	SSC
EY GTH Polska	BPO
Fream	IT
Fresenius Kabi Business Services Sp. z o.o.	SSC
Fresenius Medical Care SSC	SSC
Geoban	SSC
getsix Holding	SSC
Gigaset Communications Polska Sp. z o.o.	R&D
GlobalLogic S.A.	IT
Google Poland Sp. z o.o.	BPO
Gorilla Group	IT
Hewlett Packard (d. GeBO)	BPO
Hicron	IT
HP Inc. Polska	SSC
IBM Client Innovation Center	IT
Identt Sp. z o.o.	R&D
Impel	BPO
Indata BPO Sp. z o.o.	SSC
Infor (Polska) Sp. z o.o.	IT
Infusion	IT
Intive	IT
IT kontrakt	IT
JP Weber	BPO
Kruk	BPO

COMPANY	TYPE
LG Electronics Sp. z o.o.	R&D
Lindorff	BPO
Luxoft	IT
Mahle	R&D
McKinsey	R&D
Merck Business Solutions Europe Sp. z o.o.	SSC
Minetronics	IT
Mondelez	R&D
Mphasis	BPO
NBC	IT
Netia	IT
Neurosoft	R&D
Nokia	R&D
Objectivity	IT
Ocado	IT
Olympus	SSC
Opera Software	R&D
Parker Hannifin	SSC
PGS Software	IT
PM Group Polska	BPO
PPG	R&D
QAD	IT
Qatar Airways	SSC
Qiagen Business Services	SSC
Red Embedded	IT
Redknee Sp. z o.o.	R&D
Rinf	IT
RST Sp. z o.o. sp. k.	IT
Ruukki Polska	SSC
S3 (Silicon & Software Systems)	IT
Schaeffler	SSC

COMPANY	TYPE
Sente Systemy Informatyczne sp. z o.o.	IT
Sii	IT
Smart Commerce	IT
Smith&Nephew	SSC
SoftServe Poland	IT
Synexus Polska Sp. z o.o.	SSC
Techland	IT
Telecommunications Operations & Service Centre (ACN) Sp. z o.o.	BPO
Tequila Mobile	IT
Tieto Sp. z o.o.	IT
Tooploox	IT
Toyota Motor Europe	SSC
Transition Technologies	IT
Travel Labs Poland (Ryanair Labs)	IT
UBS	SSC
Unic Sp. z o.o.	IT
Unit4 Polska	IT
UNITY S.A.	IT
UPS GBS Polska	SSC
UTC Aerospace Systems	R&D
Viessman R&D Wrocław	R&D
vm.pl sp. z o.o.	IT
Volvo Polska	SSC
Volvo Polska (Volvo IT?)	IT
Vulcan	IT
WABCO Polska	R&D
WABCO Polska	SSC
Whirlpool Polska Sp. z o.o.	R&D
XL Catlin SE	SSC
Xylem Shared Services	SSC

Year of inauguration in Wrocław





Call Center

Jobs - English speakers (PLN gross)



POSITION	MINIMUM	MAXIMUM
Junior Consultant	PLN 3 300	PLN 4 000
Consultant	PLN 4 000	PLN 5 000
Senior Consultant	PLN 5 000	PLN 6 000
Team Leader	PLN 6 000	PLN 7 500
Supervisor	PLN 7 500	PLN 9 000
Manager	PLN 9 000	PLN 11 000

IT

Jobs - English speakers (PLN gross)



POSITION	MINIMUM	MAXIMUM
Net Developer	PLN 10 000	PLN 17 500
C++ Developer	PLN 9 000	PLN 15 000
Help Desk	PLN 5 000	PLN 7 000

Gross average monthly salary in PLN in Wrocław

6009.66

Accounts payables / Accounts Receivables

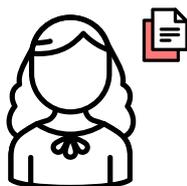
Jobs – English speakers (PLN gross)



POSITION	MINIMUM	MAXIMUM
Junior Accountant	PLN 3 800	PLN 4 500
Accountant	PLN 4 500	PLN 5 500
Senior Accountant	PLN 6 000	PLN 9 000
Team Leader	PLN 9 000	PLN 11 000
Supervisor	PLN 10 000	PLN 13 000
Manager	PLN 12 000	PLN 15 000

General Ledger

Jobs – English speakers (PLN gross)



POSITION	MINIMUM	MAXIMUM
Junior Accountant	PLN 4 000	PLN 5 000
Accountant	PLN 5 500	PLN 7 000
Senior Accountant	PLN 7 000	PLN 9 000
Team Leader	PLN 9 000	PLN 11 000
Supervisor	PLN 10 000	PLN 13 000
Manager	PLN 12 000	PLN 15 000

Source: Grafton Recruitment

/Culture, entertainment, recreation

9  cinemas

8  theatres

28  museums

22  shopping
malls

Conference facilities

- Art Hotel
- Business Link Green2Day
- Centrum Konferencyjne SWPS
- City Space - Aquarius Business House
- City Space - Nobilis
- CUPRUM NOVUM
- Dolnośląska Agencja Współpracy Gospodarczej
- DoubleTree by Hilton Wrocław Hotel
- Hala Stulecia i Wrocławskie Centrum Kongresowe
- Haston City Hotel
- Hotel Campanile Wrocław Centrum
- Hotel Monopol Wrocław
- Ibis Styles Wrocław Centrum
- Mercure Wrocław Centrum Hotel
- Novotel Wrocław Centrum
- OH KINO i Centrum Konferencyjne
- Q Hotel Plus Wrocław Bielany
- Sale Konferencyjne Afrykarium
- Scandic Wrocław
- Sofitel Wrocław Old Town
- Terminal Hotel
- The Bridge Wrocław - McGallery
- Wrocław Centrum Conference Center

Examples of business, cultural and sports events

- Academic Job Fair
- American Film Festival
- Civil and Military Aeromixer
- Festival of Colors
- FinTech Day in Wrocław
- GITARA + Wrocław Guitar Festival
- International Festival Wratistavia Cantans
- Jazz on the Odra Festival
- Jazztopad
- Made in Wrocław
- Men Expert Survival Race
- Mentoring Walk Wrocław
- Museum Night
- New Horizons Film Festival
- Odra River Cup
- PKO Wrocław Marathon
- Runmageddon Wrocław
- Sky Tower Run
- Startup Wrocław Evolution
- Tumski Cup
- Wrocław Business Run
- WrocWalk Marathon

5  festivals

66  hotels including:

8 five-star hotels ^{*****}

17 four-star hotels ^{****}

31 three-star hotels ^{***}

22  hospitals

**Wrocław Agglomeration
Development Agency**
Investor Assistance Office



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Sources: Pro Progressio, Wrocław Agglomeration Development Agency, Main Statistical Office, Cushman & Wakefield and Grafton Recruitment.

