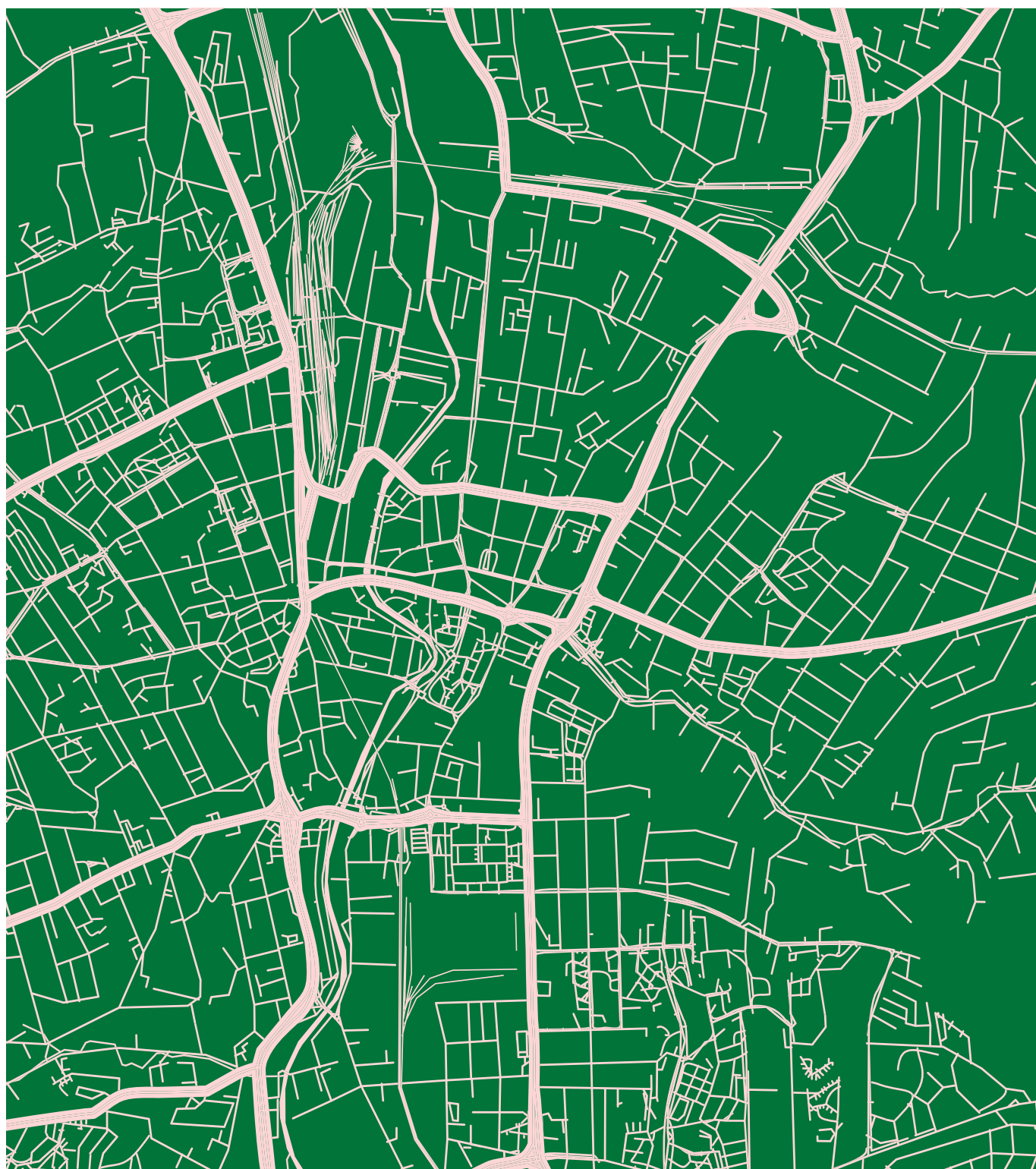


FOCUS ON

Created by **Pro Progressio**

Bielsko-Biała



October 2020



Pro Progressio

4/ City

5/ Education

6/ Transport

12/ Real Estate

14/ Business

18/ Salaries

20/ Culture,
entertainment,
recreation



Jan Kamoji-Czapiński
Director, Centre for Strategic Investments, PAIH

Bielsko-Biała is one of the fastest developing smaller BSS centers in Poland. The city is the capital of the Beskidy Euroregion and a main economic, administrative, academic and commercial center of the southern part of the Silesia Voivodeship. 8 universities are located there. The city is located at a crossing of international roads linking Poland with the Czech Republic and Slovakia. It is possible to reach three international airports, in Kraków, Katowice and Ostrava, can be reached from Bielsko-Biała in no more than 1h 20 min.

The convenient location was one of the key factors of huge interest to foreign investors from traditional industries like automotive and aviation. Representative example are Fiat Chrysler Automobiles (FCA), Eaton, ABB and ZF. In 2019, there were 524 companies with foreign capital registered in the area. Satisfied with their activity in Bielsko-Biała, they tend to invest in new SSC and R&D offices there. The best examples are

the centers established by Cooper Standard and FCA, the latter of which employs more than 1,000 employees in the area of finance, accounting and payroll services for EMEA and NAFTA regions. BSS companies in Bielsko-Biała operate in 8 languages, including Serbian and Czech. The dominant groups of services are IT support, accounting and finance.

Observing market trends and being a part of the decision-making process for many BSS projects, Polish Investment and Trade Agency expects that the Business Services Sector in Bielsko-Biała will continue to grow in the upcoming years. Competitive costs, convenient localization, modern offices, high quality of life supported by the presence of surrounding green and mountainous areas, as well as the pro-business attitude of local authorities lead to the conclusion that Bielsko-Biała should beat the top among the rising stars in the Poland's BSS sector.



Wiktor Doktor
CEO, Pro Progressio

Bielsko-Biała - a city in the South of Poland, apart from the agglomeration of Katowice and Częstochowa, it is one of the main business centers in the Silesian Voivodeship.

For many years, the city has been a location for the business services sector, mainly for IT and ICT companies. This type of operations cover 50% of all BSS-profile entities that have their headquarters and operational centers here. IT and technology centers, however, are not the only group of BSS (Business Support Services) representatives in Bielsko-Biała, there are also BPO (Business Process Outsourcing), R&D (Research and Development) centers, as well as Shared Services Centers (SSC) here.

Bielsko-Biała, is in the group of the so-called regional cities, which in the second decade of the 21st century began to gain more and more importance on the Polish map of locations convenient for the development of the business services sector.

The attractive level of salaries and the growing availability of office space, including the very modern one, are conducive to strengthening the position of Bielsko-Biała as an attractive location for the development of the BSS sector in Poland.

This is the first *Focus On Bielsko-Biała* report prepared by Pro Progressio. I invite you to read it and also to fully familiarize yourself with the city's offer that it has for the industry of modern business services in Poland.

124,5 km²

Town area

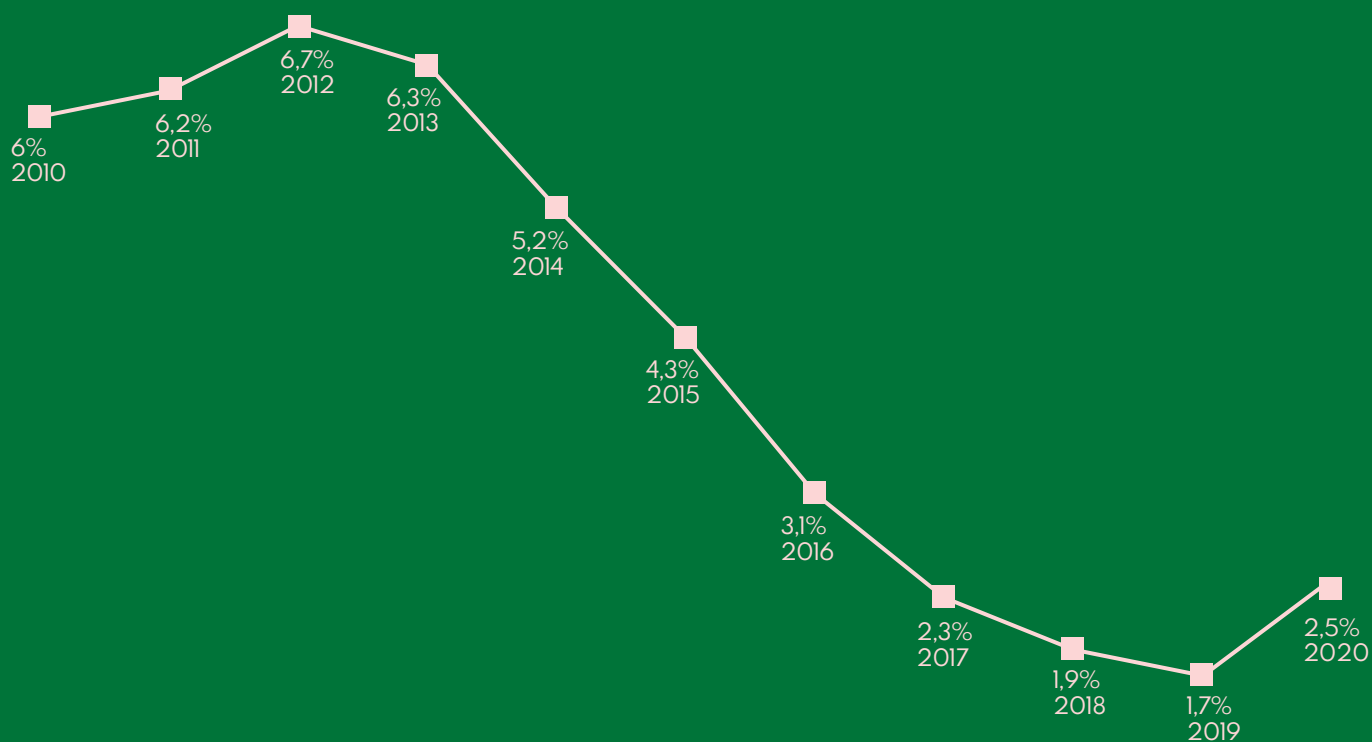
about **29%**
Green and forest areas

170 663

Population

216 152

Population of the Bielsko-Biala Agglomeration



Unemployment rate

8



Universities

1 public university  1 958
 7 private universities    6 571

82



Kindergartens

43 public kindergartens
 39 private kindergartens
 including 4 multilingual kindergartens

Primary schools:



48    14 252

High schools:

24  1 440
   4 676

Technical schools:

12  1 080
    5 353

|  | SUBJECTS* |  |
|---|----------------------------------|---|
| 7 532 | philology (foreign languages) | 1 850 |
| 24 572 | administration, business and law | 7 146 |
| 7 679 | IT/ICT | 1 401 |
| 11 969 | engineering and technology | 3 612 |
| 1 854 | logistics | 440 |
| 3 726 | architecture and construction | 1 181 |

 Graduates

 Students

* data for Śląsk region

/Transport

 **17** Car rentals

 **10** Taxi companies

531 taxis

PLN 6 initial charge

PLN 1,88 cost per 1 km

 **50** Bus lines

48 day bus lines

2 night bus lines



Public transport tickets

PLN 3 normal ticket price

PLN 12 one-day ticket price

PLN 100 monthly ticket price

192 City bikes

33,9 km length of bicycle routes

24 city bikes stations

PLN 2 / h rental cost (20 min free)

Distance from Bielsko-Biała to other cities

| | |
|---|---------|
| Warsaw | 361 km |
| Bydgoszcz | 480 km |
| Poznań | 426 km |
| Szczecin | 617 km |
| Lublin | 496 km |
| Łódź | 270 km |
| Katowice | 66 km |
| Kraków | 83 km |
| Kielce | 192 km |
| Rzeszów | 241 km |
| Gdańsk | 594 km |
| Wrocław | 241 km |
| Białystok | 558 km |
|  Berlin | 568 km |
|  Hamburg | 852 km |
|  Prague | 416 km |
|  Minsk | 902 km |
|  Kiev | 936 km |
|  Moscow | 1617 km |
|  Vilnius | 835 km |






















































Roads

2 express ways

1 regional road

2 national roads

Nearest airport: Katowice Airport. Flights from Katowice Airport in Pyrzowice

| | |
|---|---|
|  Alghero |  Liverpool |
|  Amsterdam |  London Luton |
|  Athens |  London Stansted |
|  Barcelona |  Lviv |
|  Bergen |  Malmo Sturup |
|  Birmingham |  Malta |
|  Bologna |  Manchester |
|  Brindisi |  Milan Bergamo |
|  Bristol |  Munich |
|  Burgas |  Odessa |
|  Castellon |  Oslo Torp |
|  Catania |  Palma de Mallorca |
|  Cologne Bonn |  Paphos |
|  Cork |  Podgorica |
|  Doncaster-Sheffield |  Reykjavik |
|  Dortmund |  Rome Ciampino |
|  Dubai |  Santander |
|  Dublin |  Split |
|  Edinburgh |  Stavanger |
|  Eindhoven |  Stockholm Skavska |
|  Frankfurt |  Tel Aviv |
|  Fuerteventura |  Tenerife |
|  Kharkiv |  Warsaw |
|  Kherson | |
|  Kiev Boryspil | |
|  Kiev Zhulyany | |
|  Kutaisi | |
|  Larnaca | |



**KATOWICE /
PYRZOWICE**

Distance from the Main Bielsko-Biała Railway Station


16 min

10 min



City Hall


12 min



Regional Development Agency


11 min

6 min



Regional Chamber of Commerce and Industry


14 min



The University of Bielsko-Biała


18 min



Szyndzielnia


23 min

6 min



Cartoon Film Studio


13 min

6 min



Sulkowski Dukes' Castle


9 min

5 min



Sfera Gallery


12 min



Sports airport in Aleksandrowice


15 min

7 min



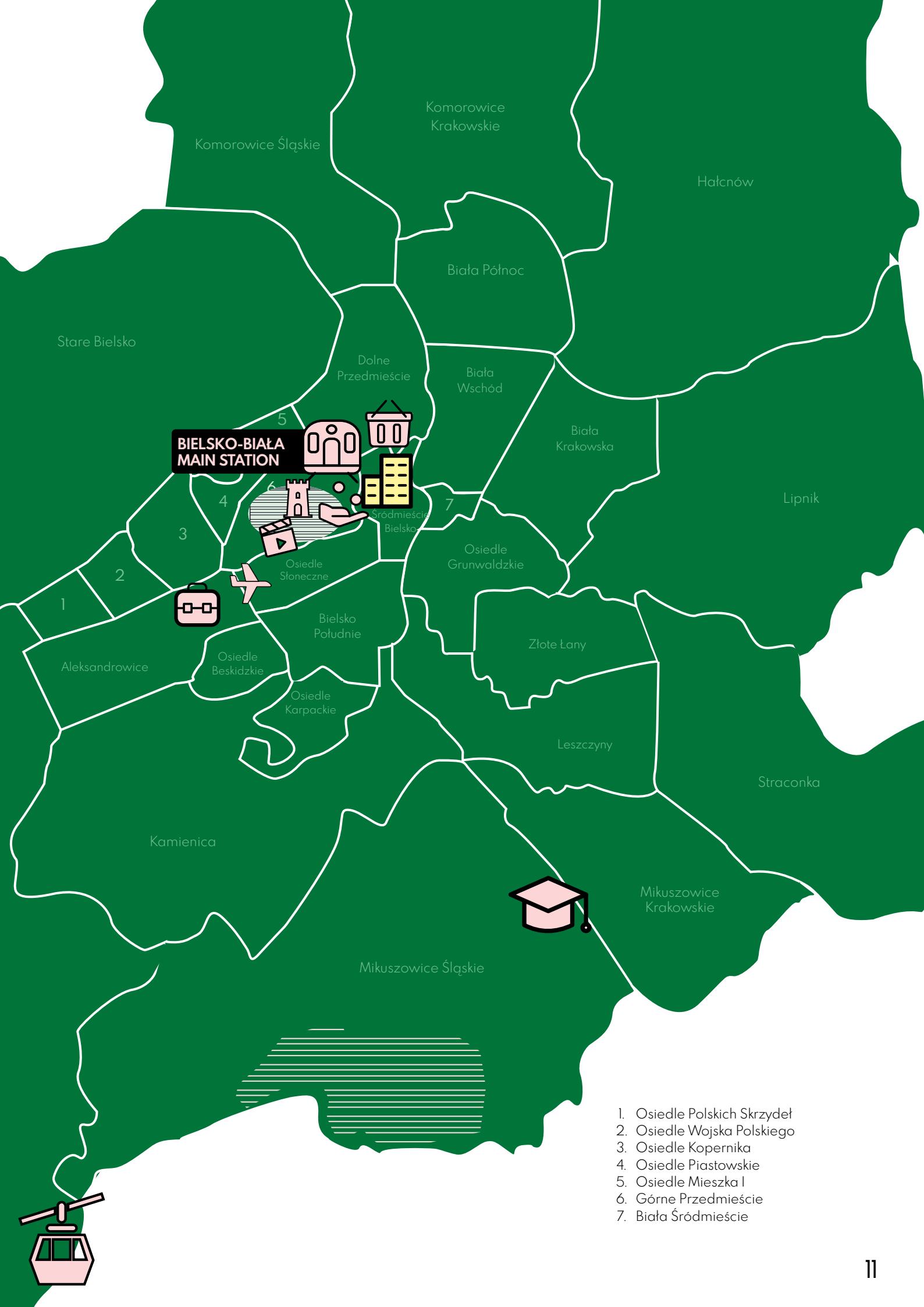
Old town


32 min



The Enduro Trails mountain bike trail complex

Wapienica



**BIELSKO-BIAŁA
MAIN STATION**

1. Osiedle Polskich Skrzydeł
2. Osiedle Wojska Polskiego
3. Osiedle Kopernika
4. Osiedle Piastowskie
5. Osiedle Mieszka I
6. Górne Przedmieście
7. Biela Śródmieście

Office spaces

| | |
|--|-------------------------|
| Total existing A/B+ Class office space | 30 500 sq m |
| Total A/B+ Class office space under construction | 11 390 sq m |
| Total A/B+ Class office space planned | 8 000 sq m |
| A/B+ Class office spaces | 12 |
| A/B+ Class office spaces under construction | 1 |
| Planned A/B+ Class office spaces | 2 |
| Minimum rent in A/B+ Class | PLN 35 / sq m / month |
| Maximum rent in A/B+ Class | PLN 60 / sq m / month |
| Average services fees in A/B+ Class | PLN 7-15 / sq m / month |

Selected office buildings

| BUILDING | ADDRESS | OWNER/ DEVELOPER | EXISTING SPACE | SPACE UNDER CONSTRUCTION | PLANNED SPACE |
|-----------------|-----------------------|---------------------|-------------------|-----------------------------|------------------|
| BB Park | Piekarska 74 | Private investor | 6 000 sq m | - | - |
| Nowe Miasto | Legionów 26/28 | Private investor | 4 200 sq m | - | - |
| Przędzalnia | Powstańców Śląskich 3 | Trabot sp. z o.o. | 3 500 sq m | - | - |
| Partyzantów 71 | Partyzantów 71 | Private investor | 3 000 sq m | - | - |
| BPBP Office | Warszawska 5 | OPAL | 2 300 sq m | - | - |
| Galeria Waga | Podwale 10 | WAGA sp.z.o.o | 2 000 sq m | - | - |
| Cavatina Hall | Dworkowa 3 | Cavatina | - | 11 390 sq m | - |
| Cavatina Hall B | Dworkowa 3 | Cavatina | - | - | 4 000 sq m |

Warehouses

| | |
|--|----------------------------|
| Total existing warehouse space: | 179 800 sq m |
| Total warehouse space under construction | 95 800 sq m |
| Total planned warehouse space | 69 600 sq m |
| Prime rent in warehouses (city and environs) | EUR 3.5-3.7 / sq m / month |

Selected warehouses

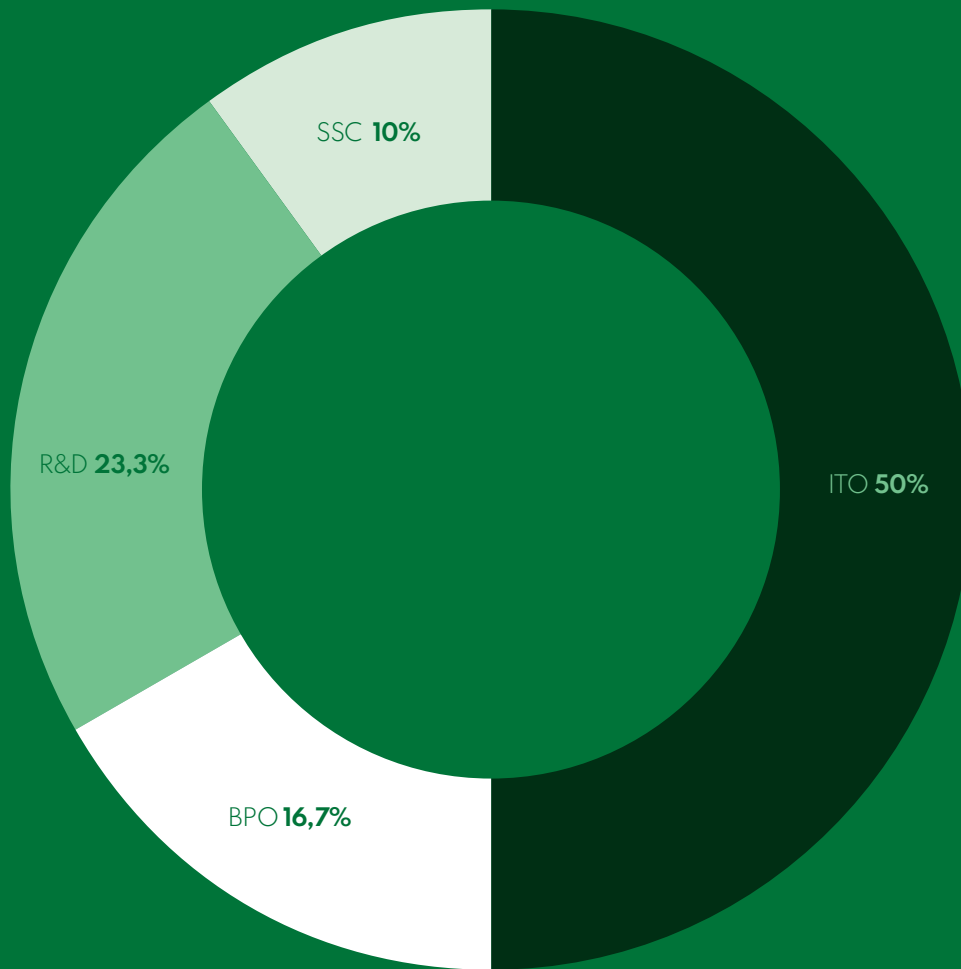
| BUILDING | ADDRESS | OWNER/DEVELOPER | EXISTING SPACE | SPACE UNDER CONSTRUCTION | PLANNED SPACE |
|----------------------------------|--|-------------------------------|----------------|--------------------------|---------------|
| Panattoni BTS GE | Leszczyńska 6, Bielsko-Biała | Panattoni Europe | 45 000 sq m | - | - |
| 7R Park Beskid I | Beskidzka 10, Czechowice-Dziedzice | 7R SA / CBRE GI | 44 550 sq m | - | 13 450 sq m |
| Bielsko-Biała Logistic Center | Gen. Władysława Andersa 61l, Hodowców 37, Bielsko-Biała | Panattoni Europe / CBRE GI | 39 300 sq m | - | - |
| Panattoni Park Bielsko-Biała III | Szklana, Bielsko-Biała | Panattoni Europe | 26 900 sq m | 41 800 sq m | - |
| 7R Park Beskid II | Czechowice-Dziedzice | 7R SA | - | 54 050 sq m | 36 000 sq m |

Shopping malls

| | |
|-------------------------------|------------------------|
| Number of shopping malls | 5 |
| Total existing space | 170 800 sq m |
| Total empty space | 3 500 sq m |
| Average rents in prime spaces | EUR 26-28 sq m / month |

Selected shopping malls

| BUILDING | ADDRESS | OWNER/DEVELOPER | EXISTING SPACE |
|-------------|-----------------------------|---------------------------------|----------------|
| Sfera | Mostowa 5 | Bielsko Biznes Centre / CBRE GI | 48 500 sq m |
| Gemini Park | Leszczyńska 20 | Gemini Holding | 43 500 sq m |
| Sarni Stok | Sarni Stok 2 | Ahold / Union Investment | 33 300 sq m |
| Auchan | Bohaterów Monte Cassino 42l | Immochan / Ceetrus | 25 500 sq m |



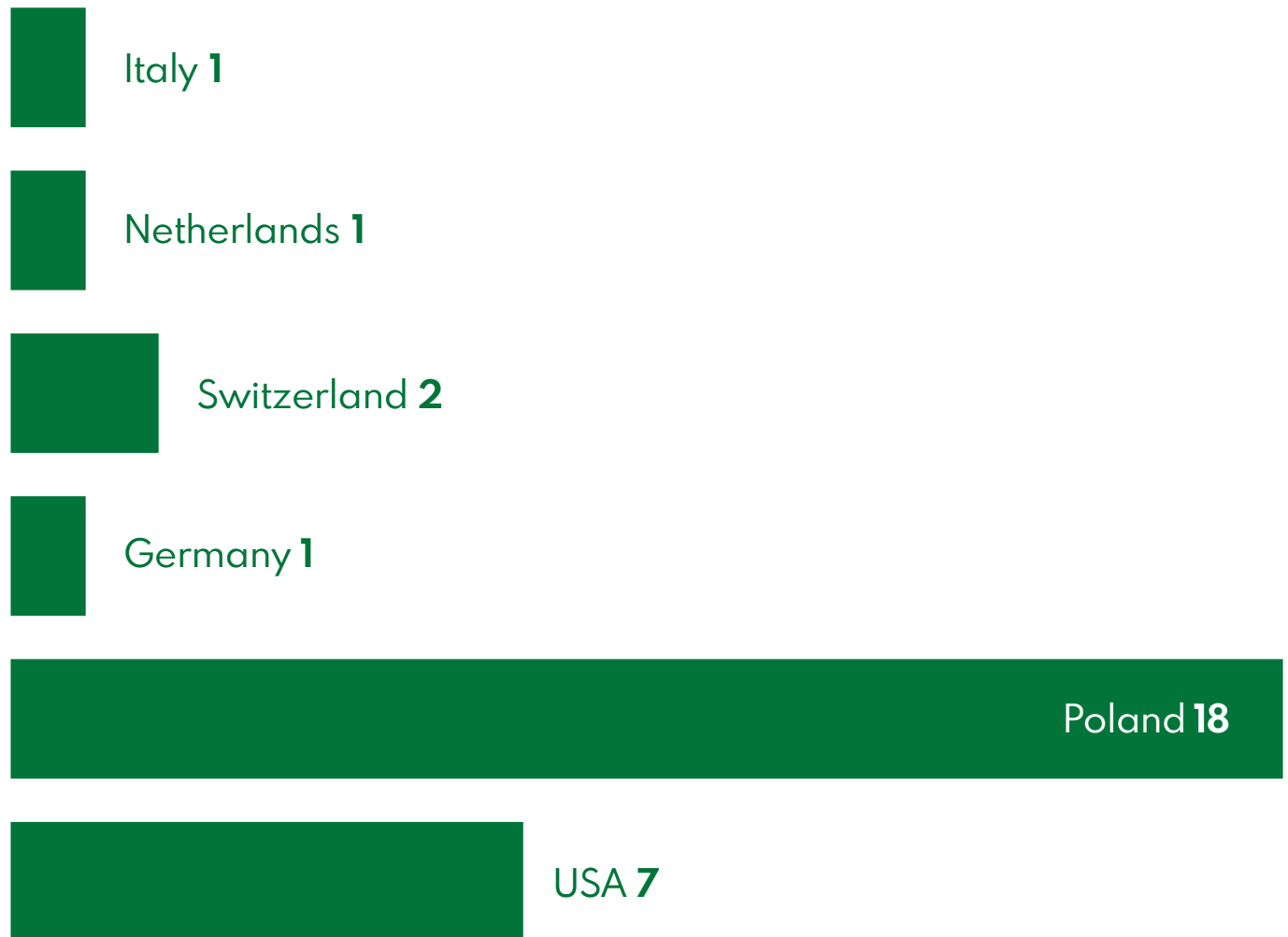
Type of operation

| COMPANY | TYPE |
|---|-------------|
| Avio Polska sp. z o.o. | R&D |
| ADP Polska sp. z o.o. | BPO |
| Jantar sp. z o.o. | ITO |
| Polmotors sp. z o.o. | R&D |
| Wawrzaszek Inżynieria Samochodów Specjalnych sp. z o.o. SK | R&D |
| 4Experience sp. z o.o. | ITO |
| ABB Industrial Solutions (Bielsko-Biała) sp. z o.o. | R&D |
| Alfavox sp. z o.o. | ITO |
| Bluecrest | ITO |
| Centrum Inżynieryjne sp. z o.o. SK | R&D |
| Cooper Standard Polska sp. z o.o. | BPO |
| Da Vinci Studio sp. z o.o. | ITO |
| Ellie Mae Poland sp. z o.o. | ITO |
| Enersys sp. z o.o. | SSC |
| FCA Services Polska sp. z o.o. | SSC |
| Inelo Polska sp. z o.o. | ITO |
| Infonet Projekt sp.łka Akcyjna | ITO |
| Instytut Badań I Rozwoju Motoryzacji Bosmal sp. z o.o. | R&D |
| Jcommerce sp. z o.o. | ITO |
| KSIBB.PL sp. z o.o. SK | ITO |
| Murapol Centrum Usług Wspólnych sp. z o.o. | SSC |
| Pitney Bowes Polska sp. z o.o. | ITO |
| Precisely | ITO |
| Rankomat sp. z o.o. SK | BPO |
| Rekord Si sp. z o.o. | ITO |
| Seiloc sp. z o.o. | ITO |
| Selleo sp. z o.o. SK | ITO |
| Signify Poland Bielsko sp. z o.o. | BPO |
| Voice Center sp. z o.o. | BPO |
| Zf Steering Systems Poland sp. z o.o. Centrum Inżynieryjne Oddział w Bielsku-Białej | R&D |

Total number of business entities in Bielsko-Biała

26 349

The origin of capital in Bielsko-Biała's organizations providing services for business



Institutions supporting entrepreneurship

- The Katowice Special Economic Zone – Jastrzębie-Żory Subzone
- BNI
- Regional Development Agency in Bielsko-Biała
- Fundusz Wspierania Przedsiębiorczości Agencji Rozwoju Regionalnego S.A.
- Regional Chamber of Commerce and Industry in Bielsko-Biała
- Startup Podbeskidzie foundation

Customer Service

Jobs - English speakers (PLN gross)



| POSITION | MINIMUM | MAXIMUM |
|-------------------|---------|---------|
| Junior Consultant | 3 500 | 4 000 |
| Consultant | 4 500 | 6 000 |
| Senior Consultant | 6 000 | 7 000 |
| Team Leader | 8 000 | 9 000 |
| Supervisor | 9 000 | 10 000 |
| Manager | 10 000 | 12 000 |

IT

Jobs - English speakers (PLN gross)



| POSITION | MINIMUM | MAXIMUM |
|---------------|---------|---------|
| Net Developer | 14 000 | 17 000 |
| C++ Developer | 14 000 | 17 000 |
| Help Desk | 7 000 | 9 000 |

**Gross average monthly salary in PLN
in Bielsko-Biała**

5 000

Accounts payables / Accounts Receivables

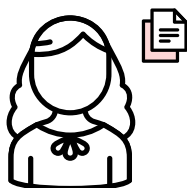
Jobs – English speakers (PLN gross)



| POSITION | MINIMUM | MAXIMUM |
|-------------------|---------|---------|
| Junior accountant | 3 500 | 4 000 |
| Accountant | 4 500 | 5 000 |
| Senior accountant | 5 500 | 6 000 |
| Team Leader | 7 000 | 8 000 |
| Supervisor | 7 500 | 8 500 |
| Manager | 9 000 | 11 000 |

General Ledger

Jobs – English speakers (PLN gross)



| POSITION | MINIMUM | MAXIMUM |
|-------------------|---------|---------|
| Junior accountant | 4 000 | 4 500 |
| Accountant | 5 000 | 6 000 |
| Senior accountant | 6 500 | 7 500 |
| Team Leader | 9 000 | 10 000 |
| Supervisor | 10 000 | 11 000 |
| Manager | 13 000 | 15 000 |

Source: Michael Page

/Culture, entertainment, recreation

3  cinemas

2  theatres

5  shopping malls

4  museums

11  hospitals

Conference facilities

- Multifunction Hall "Hala pod Dębowcem"
- Hotel Dębowiec
- Hotel na Błoniach
- The President Hotel
- Sports and Training Center Record
- Hotel ibis Styles Bielsko-Biała
- Qubus Hotel Bielsko-Biała
- Parkhotel Vienna
- Papuga Park Hotel
- Nowe Miasto
- Grępielnia

Examples of business, cultural and sports events

- BBDays4.IT Festival
- Bielsko-Biała International Power Industry Fair
ENERGETAB
- Bielsko Jazz Blast
- The International Festival of Sacred Music
- Sacrum in Musica
- International Festival of Puppetry Art
- FIAT RUN
- 90 Festival
- Jazz Autumn
- Beskids Festival of Good Energy
- FotoArtFestival
- BIELSKA JESIEŃ Painting Biennial
- OPERATION SOUTH International Rally
of Military Vehicles
- GAUDE CANTEM International Choir
Competition
- Air Show
- Bielsko Festival of Visual Arts
- Festival of Polish Composers

14  hotels
including:

4 three-star hotels ***



City Hall in Bielsko-Biała
Strategy and Economic
Development Department
Plac Ratuszowy 1
43-300 Bielsko-Biała

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Pro Progressio – foundation supporting growth and promotion of outsourcing industry in Poland. The foundation cooperates with the public and private sector as well as with the international organisations operating in the outsourcing sector. Pro Progressio is a publisher of outsourcing sector media that is with OutsourcingPortal and Outsourcing&More magazine.

Pro Progressio manages the Pro Progressio Club, to which it invites business entities providing outsourcing services and organisations operating in direct environment of the sector. The club promotes and supports the development of the outsourcing activities, both in the area of services and production, furthermore, it facilitates the establishment of new contacts and increases the outsourcing brand awareness.

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Bielsko-Biała



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