# SWISS NEARSHORING

## GUIDE TO POLAND

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# 1 FOREWORD

**Thom Barnhardt**

**CEO of European Business Services Association**

**Welcome to the 1st annual edition of the "Swiss Nearshoring Guide to Poland".** Co-published by European Business Services Association and ITELENCE, our goal is to introduce Poland as a captive or nearshoring option for mid-sized Swiss corporates.

In this guide, you'll find case-studies of Swiss companies currently operating Business Services Centres in Poland; key data about talent availability and costs; a primer on support from local authorities and Poland's Investment Promotion Agency (PAIH), and – since direct access is so important – a summary of direct flights from Switzerland to key cities in Poland.

Beyond the data, however, and "between the lines", we hope this Guide will be a first step for Swiss CFOs and CIOs who may be considering ways to tap into deeper pools of high-quality talent. This may be in the areas of F&A, Operations, or HR. Or the broadly--defined area of IT/tech – where Poland particularly excels.

Many large Swiss companies are already operating "captive" Business Services Centres in Poland, such as UBS, Credit Suisse, Six, ABB, Zurich Insurance, Barry Callebaut, Helbling, SGS, Roche, Oerlikon, Clariant, and Franke. And these operations are spread out across the country, in cities such as Warsaw, Krakow, Lodz, Wroclaw, Katowice, and Poznan.

Yet many mid-sized Swiss companies have yet to explore the subject – and when they do, they will inevitably ask the question of themselves "Build it or Buy it?" The so-called captive route – setting up one's own Business Services Centre – may have a bigger payback in the long-run, but requires substantial investment in time from Senior Management and upfront investment in CapX (such as office space, technology, etc.). On the contrary, the "nearshoring with a Partner" approach is lower-risk, involves very little upfront investment, and is an incremental approach to sourcing key business services and processes from a new location.

Both approaches have advantages and disadvantages – and the right choice often depends on the development stage of the company.

We hope that this guide is a useful introduction to the nearshoring options in Poland.

PS. Thanks to the many contributors and partners on this publication, especially the Chamber of Commerce Switzerland – Central Europe (SEC) and Polish-Swiss Chamber of Commerce.

# 1 FOREWORD

**Szymon Stadnik**

**CEO of ITELENCE**

Our publication aims to provide case-studies, inspiring success stories and useful information for all Swiss companies interested in nearshoring select back-office and IT processes or positions to Poland. Furthermore, it provides key statistics, raw data and guidance to Swiss companies considering setting up their own ("captive") SSC/GBS operation – versus the alternative of using a third-party BPO/ITO to provide these services.

Since 2010 I have had the privilege of working with Swiss companies as an employee, shareholder and service provider. I have helped numerous Swiss corporations in their nearshoring journey. Building and operating Swiss Shared Service Center and IT HUB in Poland, I have created high performing IT and back office Polish teams serving large Swiss corporations. Over the years I have seen many occasions when Swiss companies have benefited from working with Polish professionals.

Poland offers several key advantages that can significantly enhance the competitiveness of Swiss companies:

**Access to an Exceptional Talent Pool:** Poland has a highly educated and skilled workforce, particularly in fields like IT, engineering and other technical disciplines. Swiss companies benefit from access to these specialists who contribute to improving process quality and innovation. Poland's significant student population – exceeding 1.2 million - study several programs suited to the needs of IT and the Business Service Sector; cutting-edge post graduate programs produce graduates who support the growing needs of Swiss and international companies. Additionally, Poland has made significant investments in its linguistic capabilities, with service centers offering support in a total of 38 languages. English-speaking staff are readily available – with German, French and Italian speakers present in the majority of centers.

**Competitive Cost Savings:** Poland offers substantial cost savings for Swiss companies when compared to Western European alternatives. The average salary in Poland is only 30% of that in Germany and 35% of the average salary in France, making it an attractive option for Swiss firms looking to optimize their budgets.

**Poland's Technological Expertise:** Poland has emerged as a formidable contender to countries like Germany, France and the UK in terms of knowledge, experience and technological prowess. The country is a prime destination for Swiss companies seeking to enhance their global back-office processes or assemble specialized teams for tasks such as e-commerce, cloud computing, AI, BI, cybersecurity, software development, and large-scale ERP system implementations.

**Process Migration and Local Expertise:** Swiss companies are increasingly relying on the expertise of local managers to facilitate complete process migration to Poland – whether through nearshoring or offshoring models. This involves meticulous project planning, expectations management, process mapping, documentation and a gradual shift to standardization and automation.

**Poland as a Hub for Middle-Office and Knowledge-Intensive Functions:** Poland has been positioning itself as the ideal partner for transition from back-office processes to middle-office and knowledge-intensive functions. This shift necessitates a flexible workforce capable of adapting to evolving market dynamics – a trait well-embedded in the Polish workforce. In recent years, Swiss companies have shown keen interest in transferring advanced functions – those involving artificial intelligence, cloud solutions, Big Data, business analytics, SAP, and data analysis and integration – to Poland.

Employees continuously enhance their skills through postgraduate programs, courses, training and webinars in order to meet evolving market demands, and thereby demonstrating their adaptability and resilience.

**Proximity and Time Zone Synchronization:** Swiss companies have found Poland to be an ideal nearshoring partner due to its geographic proximity, with many direct flights and a similar time zone. This circumstance fosters seamless communication and collaboration between Swiss headquarters and their Polish counterparts.

Swiss companies have found Poland to be an invaluable partner in their quest for competitiveness. The partnership between Switzerland and Poland in the realm of nearshoring continues to flourish – promising further mutual growth and success.

# 1 FOREWORD

**Ulrich Schwendimann**

**Managing Director of Polish-Swiss Chamber of Commerce**

Swiss companies are nearshoring business and IT services to Poland - there are already many success stories and inspiring business cases telling this story - which started about 15 years ago.

Also from a macroeconomic perspective, the size of nearshoring is impressive. According to the National Bank of Poland, Switzerland was Poland's fourth most important trade partner in the services sector in 2021 - behind Germany, the United Kingdom and the United States. Of the business and IT services carried out in Poland and sold to Swiss companies, more than are provided by Polish service providers affiliated with a receiving entity in Switzerland. In other words, at the macro level we see a thriving business model that started 15 years ago under the name Shared Service Centers, but now, as the services provided have become more sophisticated, they carry names such as Global IT, Engineering Hub, Center of Excellence, etc.

How did Poland become Switzerland's preferred business and IT services center? Factors such as EU membership, cultural proximity and cost efficiency are of course key factors. However, the driving force behind the rapid climb up the value chain is people: Poland's well-educated and skilled workforce, especially in industries such as IT and engineering, but also in customer service. Polish service providers are known for their quality, reliability and adherence to international standards.

Nearshoring creates mutually beneficial economic relationships by stimulating service exports from Poland to Switzerland. Moreover, Swiss companies often value long-term partnerships with service providers and engage in knowledge transfer. This results in an increase in the skills and capabilities of Polish employees, making them even more attractive to international clients.

In conclusion, if you are considering nearshoring as a strategic move, you are in good company. I highly recommend contacting companies that are already operating in Poland. Their experiences can be more than valuable and usually they are willing to share. Hope to see you soon in Poland!

**If you are interested in obtaining more information about nearshoring, please contact us!**


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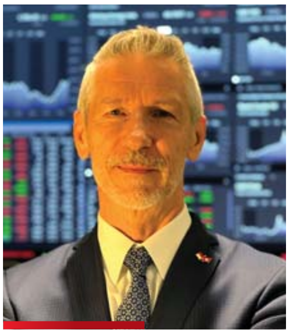
# 2 INSPIRING INTERVIEWS

## WITH EXECUTIVES REPRESENTING SWISS CORPORATIONS WHO HAVE ESTABLISHED BUSINESS SERVICE CENTERS IN POLAND

# SIX



**Martin Geyer**

**Head SIX Global Business Solutions**

**Please describe what kind of nearshoring activities your company is running in Poland?**

In November 2017, SIX opened its captive Global Business Solutions (GBS) office in the centre of Warsaw (Wola) – about 8 km away from Warsaw Chopin Airport. Today, we have over 80 teams and 250+ SIX employees from various Corporate Functions and Business Units working in GBS Warsaw. They provide corporate services such as F&A, Procurement, HR, Translation, Travel Management, Marketing & Communication, Project Management/PMO, Application Development, Testing and Maintenance, IT Infrastructure, Risk Security & Compliance – as well as services for Business Units such as Business Analysis, Analytics, Customer Support and specialized IT Development and Testing for Banking Solutions.

Each team reports directly into its Corporate Function or Business Unit, and their managers are responsible for managing their staff and the service delivery and quality assurance. With a few exceptions all teams are part of extended teams, located in different SIX locations in other countries.

**How did your company arrive at its decision to set up in Poland?**

In 2016, SIX had many major IT projects and maintenance contracts running with various outsourcing partners, as well as a number of new major projects in the planning stage. We were therefore faced with the decision whether we wanted to continue to outsource our IT and business services to external service providers, or whether we could provide them ourselves, in-house, and more cost-effectively and thus also keep the know-how in SIX. In addition, major Swiss banks are our Clients, and they have been successfully maintaining their own captive centers in Poland for several years. It was therefore an obvious step to examine this additional sourcing option. After analyzing which SIX processes and which locations are best suited for nearshoring, in compliance with the requirements of regulators and client contracts, we decided on Poland and Warsaw. At that time, SIX already had a sales office in Warsaw which was being expanded into an operation center. We then took this as an opportunity to further expand this location as a group-wide nearshoring location. Our expectations were mainly in terms of access to a large pool of skilled and experienced specialists, lower personnel and location costs compared to Switzerland - as well as the opportunity to build and expand new teams in a more favorable location with enough capacity.. In doing so, we have deliberately opted for a nearshoring model in which employees are built up as extended teams to the existing ones, and employee management and service responsibility remain in the responsible business areas. After 5 years, we can confirm that all our expectations continue to be met.

**What surprised you the most?**

Since we already had a location in Warsaw, as I have mentioned, we were aware of most of the local conditions and laws. What surprised us was how quickly we found highly skilled and experienced employees for our new teams, especially since we needed a good knowledge of German language for many positions. The fluctuation rate was also far below the industry average. But where we are still surprised from time to time is how quickly adjustments to laws are introduced by the government, which then also have a direct influence on us as a company, and we have to adapt our processes at very short notice.

**What were the main drivers for nearshoring your processes and positions from Switzerland to Poland?**

The focus was and continues to be on: access to skilled and experienced employees in combination with the lower location costs. In addition, the existing teams in Warsaw can be expanded quickly, enabling us to respond promptly to requirements from our business units and optimally support SIX in its aim for growth and cost-optimization efforts.

Although the costs for highly qualified specialists are slowly adapting to the European level, we still have very competitive cost advantage in Poland – especially compared to Switzerland. Also, we can still cover all our open positions with skilled and experienced employees.

**How will your operations in Poland develop in the next 2-3 years?**

We expect a moderate growth of GBS in Poland, comparable to the growth in the first 5 years. Existing teams are being expanded and new teams are constantly being added.

**Please suggest advice or "lessons-learned" for other Swiss companies considering nearshoring options.**

I can only speak from my point of view. First of all a company needs to have a clear idea of what they want to achieve with nearshoring and how they want to integrate nearshoring as part of their corporate culture and global location strategy. As a rather small nearshoring location, it was important to us, right from the start, that our GBS is an equal part of SIX and- all the business units could decide for themselves whether and how they wanted to use our location to support and achieve their business goals.

The model with fully integrated teams has also proven to be very successful, as employees are a full part of the company. Of course, this requires an additional effort for the integration and cohesion of the distributed teams, but this is much easier than before with today's tools of communication and collaboration. Regular visits by managers and team colleagues, as well as joint team events also contribute to the great working atmosphere. The goal is to create a family atmosphere.

Another learning is that in addition to a modern infrastructure and good working conditions – like benefits, competitive salary and home office opportunities – employees also receive opportunities for their further development and career, otherwise they tend to change employers after 1-2 years. The job market is very competitive and the employees are courted accordingly from all sides. Not to be underestimated is our Swiss Brand, as Switzerland is considered a very popular and appreciated country and employer in Poland. Our management culture (more collaborative and not so hierarchical) is very different from most other countries that operate nearshoring centers in Poland.

And as a final hint: whenever possible, managers and employees should act as bridge builders in the nearshoring location temporary or with a long-term assignment) to convey and exemplify Swiss culture and to support the integration of distributed global teams.

# BARRY CALLEBAUT

**Steven Vandamme**

**CIO of Barry Callebaut**

**Please describe what kind of nearshoring activities your company is running in Poland?**

In 2015, Barry Callebaut opened its captive Shared Services Center (SSC) in the city of Lodz. We started with a small kernel of +/- 50 employees providing services to Europe, but by 2023, the SSC has significantly grown – to +/- 350 employees, also meanwhile servicing North America next to Europe.

**What types of services does your centre provide? (F&A, IT, HR, Procurement, other?)**

Our SSC in Lodz provides Corporate and BU services mainly in the areas of Finance, IT and Master Data, but also services for other Functions like HR, Customer Care and Quality are more and more getting delivered from Lodz. Also Global Business Process Owners for services largely performed from the SSC are now based in Lodz.

**How did your company arrive at its decision to set up in Poland? Tell us about your initial expectations - and how your experiences compared with them.**

Barry Callebaut is headquartered in Zurich and although we are a global company, still a big portion of our business is in Europe. So, for our first Shared Services Center, there was a deliberate choice for "near-shoring" in Eastern Europe instead of "off-shoring" - for reasons of time zone coverage, travel proximity for global and European leadership, and cultural fit. We selected Poland (Lodz) because we already had operations in Lodz (e.g. a large factory) and because Poland in general -but also Lodz in specific has an excellent talent pool.

**What surprised you the most? Please comment on both positive and negative aspects.**

Employee turnover in a near-shore SSC like Lodz is higher than elsewhere in our company, but thanks to the excellent talent pool in Lodz we can rather quickly find replacement staff The employees in our SSC are all relatively young - typically highly motivated with expectations of personal development and career growth opportunities.

**What were the main drivers for nearshoring your processes and positions from Switzerland to Poland?**

Originally in 2015 with the small kernel of 50 employees, the focus of the SSC was on centralizing transactional activities at more optimal cost. But gradually our company started to perform more value-adding activities from Lodz in Poland also contributing to the Center growth to 350 employees. The SSC has also become a catalyst for further Business Process Harmonization and Improvements, as such driving up „Compliance" and reducing "Company Risks".

**How would you assess the balance between the cost and the availability of a skilled, experienced workforce in Poland?**

The Warsaw-Lodz Duopolis is one of the biggest SSC markets within Poland, with 400+ SSCs and 100k+ employees. Although there is higher demand since 2015, we still see sufficient human resource availability thanks to the university talent pools of 280k+ students. Polish salaries have been growing faster than in Western Europe - but they remain attractive.

**How will your operations in Poland develop in the next 2-3 years?**

As our company grows, we are seeking to primarily hire for new positions within our SSC in Lodz. Furthermore, driven by the success of our near-shore SSC in Europe we have meanwhile established a SSC for Apac in Malaysia (Kuala Lumpur) in 2022, this Center meanwhile employs +120 Barry Callebaut colleagues.

**Please suggest advice or "lessons-learned" for other Swiss companies considering nearshoring options.**

Start small(er), demonstrate value-added of the Center, take the learnings as the basis for scaling. Go beyond labour arbitrage and dare to introduce value-adding activities in the Center. You must ensure your processes and supporting IT business applications are sufficiently harmonized before starting to perform activities from a SSC.

# ZURICH INSURANCE

**Katarzyna Kuglin**

**Head of Zurich Capabilities Centers**

**Please describe what kind of nearshoring activities your company is running in Poland?**

In March 2016, the Zurich Insurance Group opened its captive Business Service Center in Krakow, one of Poland's Tier 1 cities (next to Warsaw and Wroclaw) in terms of sector employment and maturity.

It initially included around 100 employees and offered mainly services like Financial Accounting & Reporting, Planning & Performance Management as well as Financial System Management.

Today we have over 350 employees supporting various of Zurich's business units. Most of our business activities operate in the "managed services" model – delivering a variety of services to our stakeholders while at the same time being an extension of Zurich business units globally.

**What types of services does your center provide?**

We currently provide services in the areas of Financial Accounting & Reporting, Planning & Performance Management, Financial Systems Management, Internal Controls Audit, Human Resources (Integrated Talent Management Operation), Robotic Process Automation, Procurement & Vendor Management as well as Source to Contract.

**How did your company arrive at its decision to set up in Poland? Tell us about your initial expectations - and how your experiences compared with them.**

Why Poland? The initially planned scope was purely finance related. Therefore, we performed a structured location analysis which highlighted Poland as an ideal place due to good education and skills in finance, excellent language capabilities, the availability of finance shared services and outsourcing partners (who could provide initial support).

Over time, the real experiences didn't just meet all our expectations, but exceeded them. Most candidates identified through the recruitment process have master's degrees, they often speak two or three different foreign languages. In addition, they have a great work commitment and a team spirit, which is as important as substantive knowledge.

**What surprised you the most? Please comment on both positive and negative aspects.**

The history of the service delivery evolution in Poland is only around 20 years. Within this time Krakow has gained the leading position on the European market, being currently ranked 9th on the global scale considering availability of talent pool, modern office space and quality of local universities.

We are witnessing a rapidly developing economy that at the same time is still very competitive with respect to western Europe. These economic/macro conditions were an accelerator for our center's growth we've observed for the last years. When the COVID-19 pandemic appeared, we also integrated a flex working model, which allowed us to explore the workforce market also outside of Krakow.

What we find challenging, though, is a competitive local labour market, which requires close monitoring and rapid responses to ongoing changes.

**What were the main drivers for nearshoring your processes and positions from Switzerland to Poland?**

Poland is the sixth-largest economy in the European Union (EU) with a population of 38 million. There were several factors that the company was considering, but the key ones were the following:

a) Economic consideration: Poland, and more specifically Krakow, has an advanced business services market (a recognizable destination for foreign investors). The country is a significant recipient of most of the EU funds, which support companies through cash grants.

b) Availability and quality of workforce (access to highly qualified and multilingual employees strong academic centres (over 20 colleges and universities)). Krakow is experiencing impressive demographic growth – about 10% in the last decade.

c) Availability and quality of infrastructure. Poland has a vast network of road, rail, air, and sea transport infrastructure. The country is continuing to modernize and develop its transport system.

d) And finally, low risk assessment indicators.

**How would you assess the balance between the cost and the availability of a skilled, experienced workforce in Poland?**

Even though Poland is still catching up with other western European economies, the ratio of service quality to price is still competitive with western Europe.

The availability of highly qualified staff as well as their flexibility will continue to be highly attractive for foreign businesses.

Furthermore, the quality of life in Poland becomes more and more attractive for expats who are acting as- ambassadors for their companies to bring business here.

**How will your operations in Poland develop in the next 2-3 years?**

Over the last 5 years we have observed moderate, continuous growth at our center. It circulates around expansions of existing services we deliver, but there are also new services we've been launching in our center to address our stakeholders' needs.

There are two reasons behind it: a) within the quality of services we deliver we have gained our stakeholders' trust and confidence which supports our business; b) we continue to be attractive compared to several, not only European markets, but also some in Latin America and the Asia-Pacific region.

Therefore, we aim for further continuous growth at the KRK Business Service Center within next two to three years.

**Please suggest advice or "lessons-learned" for other Swiss companies considering nearshoring options.**

The key advice I would be giving to a company considering a nearshoring option would be to consider the economy of scale and focus on so called center of excellence. The center should have its own identity and gain from synergy effects.

# 3 POLAND OVERVIEW

- **European Union Law**
- **Proximity with major European financial centers**
- **Stable Democracy and Economy**
- **Transparent tax and legal systems**
- **Compliance with all General Data Protection Regulations (GDPR)**


**840** companies in Poland have Swiss investor

**50** Swiss Corporations have their Business Service Centres in Poland

Poland ranks **first** in Europe in terms of employment in the Business Services Sector

Business services sector employs **400 thousand** people

**1,2 million** students

**295 thousand** graduates per year

**English, German, French** and **Italian** are most popular languages used by nearshoring centers in Poland

| Population: **37.8 mln** | **Economic outlook:** | **Member of:** |
|---|---|---|
| Currency: **PLN** | GDP Growth: 5,9% | European Union |
| Capital: **Warsaw** | | Schengen Zone |
| Time zone: **(GMT +1)** | | NATO |
| | | OECD |
| | | WTO |

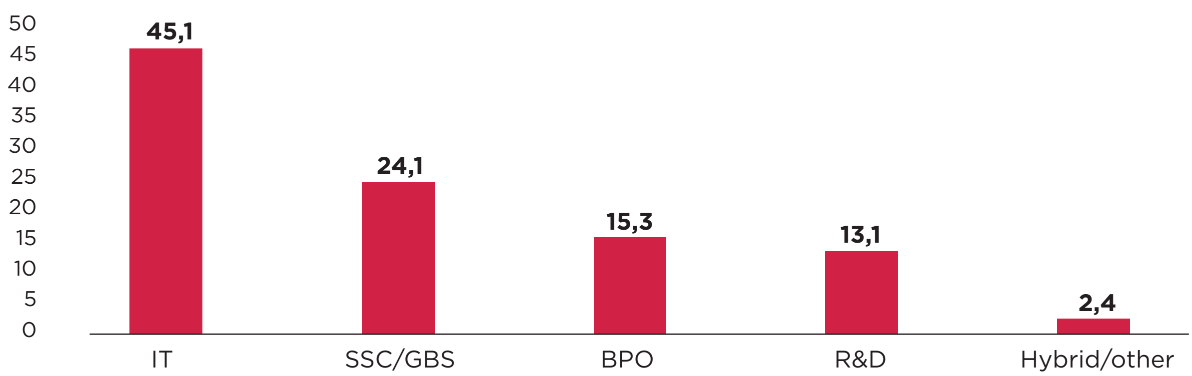
# 4 NEARSHORING AND OFFSHORING IN POLAND

## FACTS ABOUT BUSINESS SERVICE SECTOR

## GENERAL CHARACTERISTIC OF BUSINESS SERVICES SECTOR

Poland is one of the leading markets for the nearshoring and offshoring of business services both in Europe and globally. At the end of Q2 2022, more than 1,714 business services centres were operating in Poland. They comprise BPO, SSC/GBS, IT and R&D entities. IT centres are the most frequent type of centre with 45.1%, followed by SSC/GBS centres (24.1% of the total) and BPO centres accounting for 15.5%. Finally, R&D centres comprise 13.1% of business services centres.

**Graph 1 Distribution of the number of centres by type (%)**




Source: ABSL 2022.

The most popular locations for business services centres are the biggest cities in Poland. These in turn are grouped into four Tiers (ABSL 2022). Tier 1 and 2 cities are the most crucial locations for investment in the business services sector.

**Tier 1:** Krakow, Warsaw, and Wroclaw

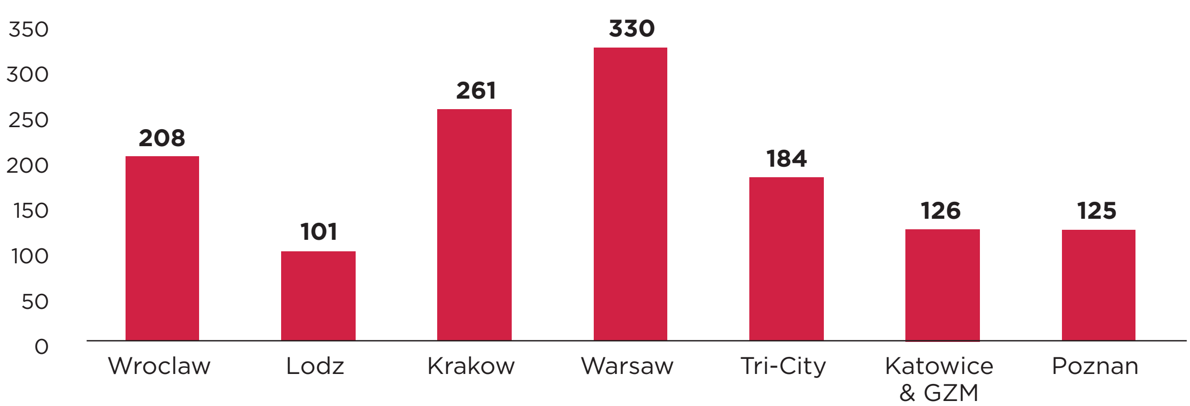
**Tier 2:** Tricity, Katowice & GZM (the Upper Silesian and Zaglebie Metropolis), Lodz, and Poznan

**Tier 3:** Bydgoszcz, Lublin, Rzeszow, and Szczecin

**Tier 4:** Bialystok, Opole, Olsztyn, Radom, Kielce, Tarnow, Elblag, Plock, Rybnik and others

Investors prefer existing Tier 1 and 2 locations for new investments - in particular for first-time investments. The total number of business services centres in these cities amounts to 1,335 – 77.9% of the total number of business services centres in Poland.

**Graph 2 Number of business services centres in Tier 1 and 2 cities in Poland, 2022**



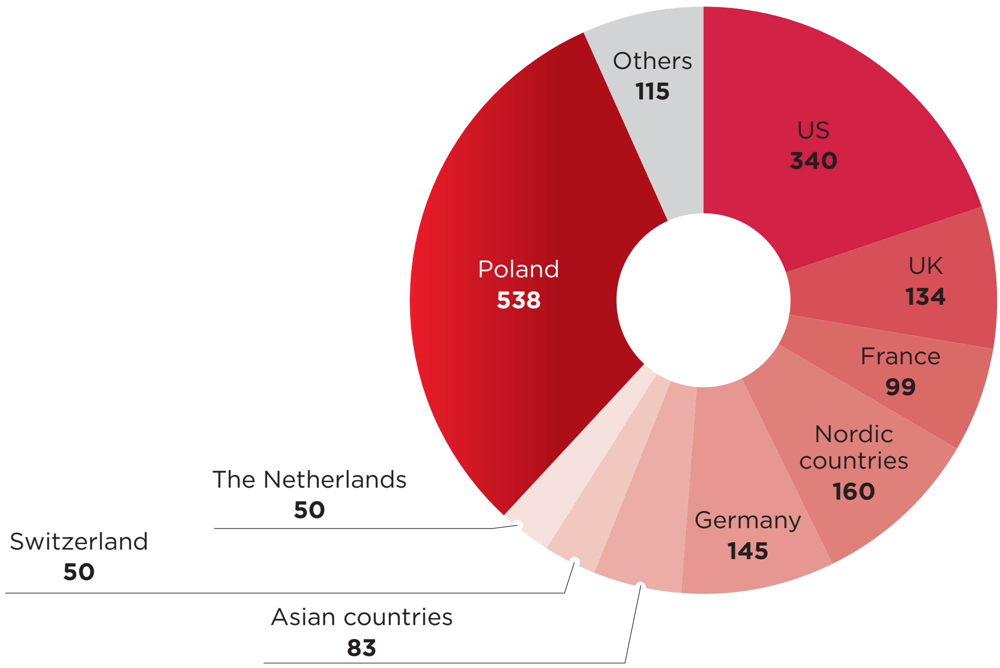

Source: ABSL 2022.

The potential of the business services market is growing consistently. The already impressive size of this sector continues to increase as evidenced by the fact that, at the end of February 2023, there were 47 active investment projects from the modern business services sector (BSS) in the portfolio of the Polish Investment and Trade Agency (PAIH). This is an increase of over 40% on 2022.

New projects supported by PAIH are mainly dedicated to the development of shared service centres (SSC) and IT – but there has also been an increase in investment in the most advanced research and development (R&D) centres (PAIH 2023).

The business services centres operating in Poland hail from 46 countries. The highest number of foreign-owned centres originate from the United States with 340. Other countries and regions are as follows: UK – 134 centres, France – 99, Nordic countries – 160 and Germany – 145. 50 business services centres come from Switzerland – 2.9% of all foreign-owned centres in Poland.

**Graph 3 The number of centres by country of origin in 2022**




Nordic countries: Denmark, Finland, Norway, Sweden
Asian countries: China, Hong Kong, India, Israel, Japan, Qatar, Singapore, South Korea, Turkey, United Arab Emirates.

Source: ABSL 2022.

# SWISS NEARSHORING TO POLAND

The largest Swiss business services centres are located in Tier 1 and 2 cities, i.e. Warsaw, Krakow, Lodz and Katowice.

**Table 1 Location of selected Swiss business services centres in Poland**

| Company name | **Location of business services centres** |
|---|---|
| **Roche** | Warsaw |
| **Credit Suisse** | Warsaw, Wroclaw |
| **Franke** | Warsaw |
| **SIX** | Warsaw |
| **Oerlikon** | Warsaw |
| **Tally Weijl** | Warsaw |
| **Mettler Toledo** | Warsaw |
| **UBS** | Krakow |
| **Zurich Insurance** | Krakow |
| **ABB** | Krakow |
| **Clariant** | Lodz |
| **Barry Callebandt** | Lodz |
| **SGS** | Katowice |

Source: the author's analysis based on publicly available data

The Polish market is highly attractive for Swiss investors from a variety of sectors. This is reflected in the fact that there are 840 companies in Poland in which one of the shareholders is a Swiss company or an individual who is a Swiss citizen. They operate in all Polish regions (according to the NUTS 2 classification). Most of them conduct their businesses in the regions where Tier 1 and 2 cities are located: 389 companies in Mazovia, 80 in Lesser Poland and 71 in Greater Poland.

**Table 2 Swiss-owned companies by Polish regions (NUTS II, 2023)**

| Region | No of Swiss-owned companies | % of total Swiss-owned companies |
|---|---|---|
| **Lower Silesia** | 80 | 9,52 |
| **Kuyavia-Pomerania** | 14 | 1,67 |
| **Lubelskie** | 10 | 1,19 |
| **Lubuskie** | 15 | 1,79 |
| **Lodzkie** | 35 | 4,17 |
| **Lesser Poland** | 69 | 8,21 |
| **Mazovia** | 389 | 46,31 |
| **Opolskie** | 5 | 0,60 |
| **Subcarpathia** | 8 | 0,95 |
| **Podlaskie** | 5 | 0,60 |
| **Pomerania** | 42 | 5,00 |
| **Silesia** | 44 | 5,24 |
| **Swietokrzyskie** | 3 | 0,36 |
| **Warmia-Masuria** | 15 | 1,79 |
| **Greater Poland** | 71 | 8,45 |
| **West Pomerania** | 35 | 4,17 |



Regions where the Tier 1 cities are located

Regions where the Tier 2 cities are located

Source: Centralny Osrodek Informacji Gospodarczej (Central Economic Information Bureau), 2023

**Table 3 Swiss-owned companies in Tier 1 and 2 cities (2023)**

| City | No of Swiss-owned companies |
|---|---|
| **Tier 1** | |
| **Warsaw** | 351 |
| **Krakow** | 57 |
| **Wroclaw** | 51 |
| **Tier 2** | |
| **Poznan** | 34 |
| **Tricity** | 32 |
| **Lodz** | 26 |
| **Katowice and GZM** (the Upper Silesian and Zaglebie Metropolis) | 10 |

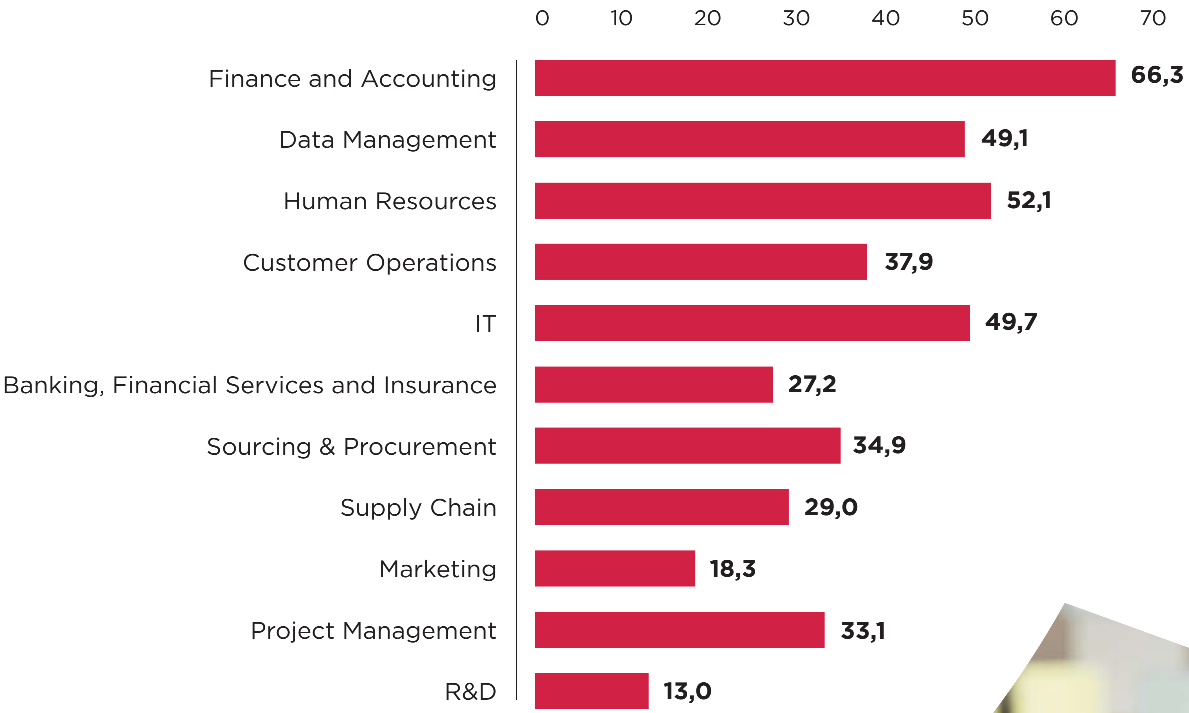
Source: Centralny Osrodek Informacji Gospodarczej (Central Economic Information Bureau), 2023

The largest number of Swiss companies have invested in Poland in the sectors of IT software, electricity generation, rental and property management, Consulting (business and management) and property development.

# PROCESSES BEING DELIVERED BY SERVICE CENTRES IN POLAND

The majority of processes in business services centres in 2022 involved either back-office (51.7%) or mid-office (47.25%) processes. However, an increase in mid-office processes was noted in recent years.

**Graph 4 Process categories supported by business services centres in Poland (industry averages)**




Source: ABSL 2022.

Most popular categories of processes supported by Service Centres in Poland are:

**Finance and Accounting:** Accounts Payable, General Ledger & Period Reporting, Travel & Expenses, Invoice to Cash, Business Controlling (incl. Project Controlling), Statutory & Tax Services, Financial Planning & Analysis, Order to Invoice (Order Management), Treasury Data Management: Master Data Management (various business processes)

**Data Management:** Master Data Management (various business processes)

**Human Resources:** HR Administration & Reporting, Recruitment HR: Talent Management, Payroll, Compensation & Benefits, Knowledge Management, Mobility

**Customer Operations:** Customer Helpdesk, Sales & Account Management Support, Fulfilment

**IT:** Application Lifecycle Management (incl. Software Development, Robotic Process Automation (RPA), Process Digitization, Project Management (IT specific), Infrastructure Management, User support / Service Desks, Cloud Services, Testing, Information Security (incl. Cybersecurity), Enabled Services, Business Intelligence, Data Analytics, Complex Performance Reporting

**Banking, financial services and insurance:** Risk & Compliance, Corporate Payments, Cash Management, KYC / AML, Asset Management, Fund Accounting, Other BFSI Specific Services, Insurance Services

**Sourcing & Procurement:** Indirect Procurement, Sourcing & Category Management, Direct Procurement, Strategic Procurement, Supply Chain Management & Logistics

**Marketing:** Digital Marketing, Content Management (incl. Platforms), Other Marketing Services, Strategic Marketing

**R&D:** Research & Development (other than Software Development)

# 5 LABOUR MARKET AND TALENT AVAILABILITY

Poland's economy is highly competitive and developed. With its academic strength supporting the professional talent pool, the labour market is highly secure. Poland remains a country with low unemployment rates. However, the continuous supply of well-educated graduates to the labour market ensures its highly competitive level.

In the first quarter of 2023, employment in Poland amounted to 17,062,000 people, rising quarter-on-quarter by 109,800. Compared to Q1 2022, this indicator increased by 236,800 (Eurostat 2023).

# LABOUR AVAILABILITY IN BUSINESS SERVICES

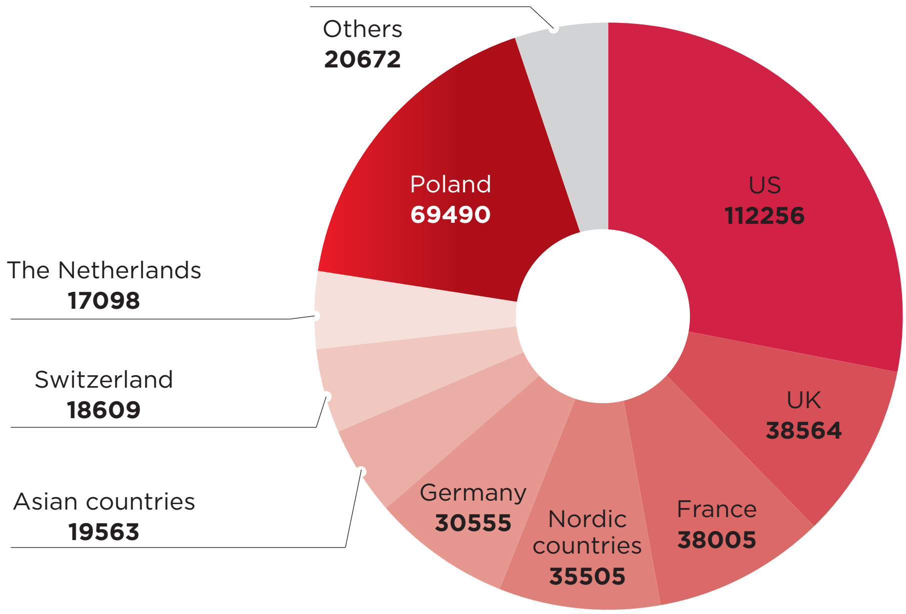
The size and quality of the talent pool is the most critical factor for any company considering nearshoring services to Poland. Business services centres employ 400,317 people. Poland ranks first in Europe and third in the world in terms of employment in the business services sector. Foreign investors are attracted by competitive labour costs, the availability of qualified staff and support at government and local levels (Source: Newseria BIZNES, 2023).

More than 41,000 jobs were created in 2022 (a growth rate of over 11.6%, year to year). Foreign-owned centres in Poland employ 330,800 people (Q1 2022), accounting for 82.64% of the overall employment in business services centres.

Swiss centres contribution in overall employment in business services centres accounts 4,6% (18,609 employees). In the total number of new jobs created by all business services centres, the largest contribution was from centres originating in the US with 28%; other counties include the UK (9.6%) and France (9.5%).

The average headcount in business services centres in Poland is 236. The ten largest centres employ 66,100 people and Credit Suisse ranks among the top 10 investors in Poland in terms of employment. The highest average headcounts are for the French (396), Swiss (380) and Irish (362) centres.

**Graph 5 Employment in business services centres by country of origin (2022) – countries with the highest share**



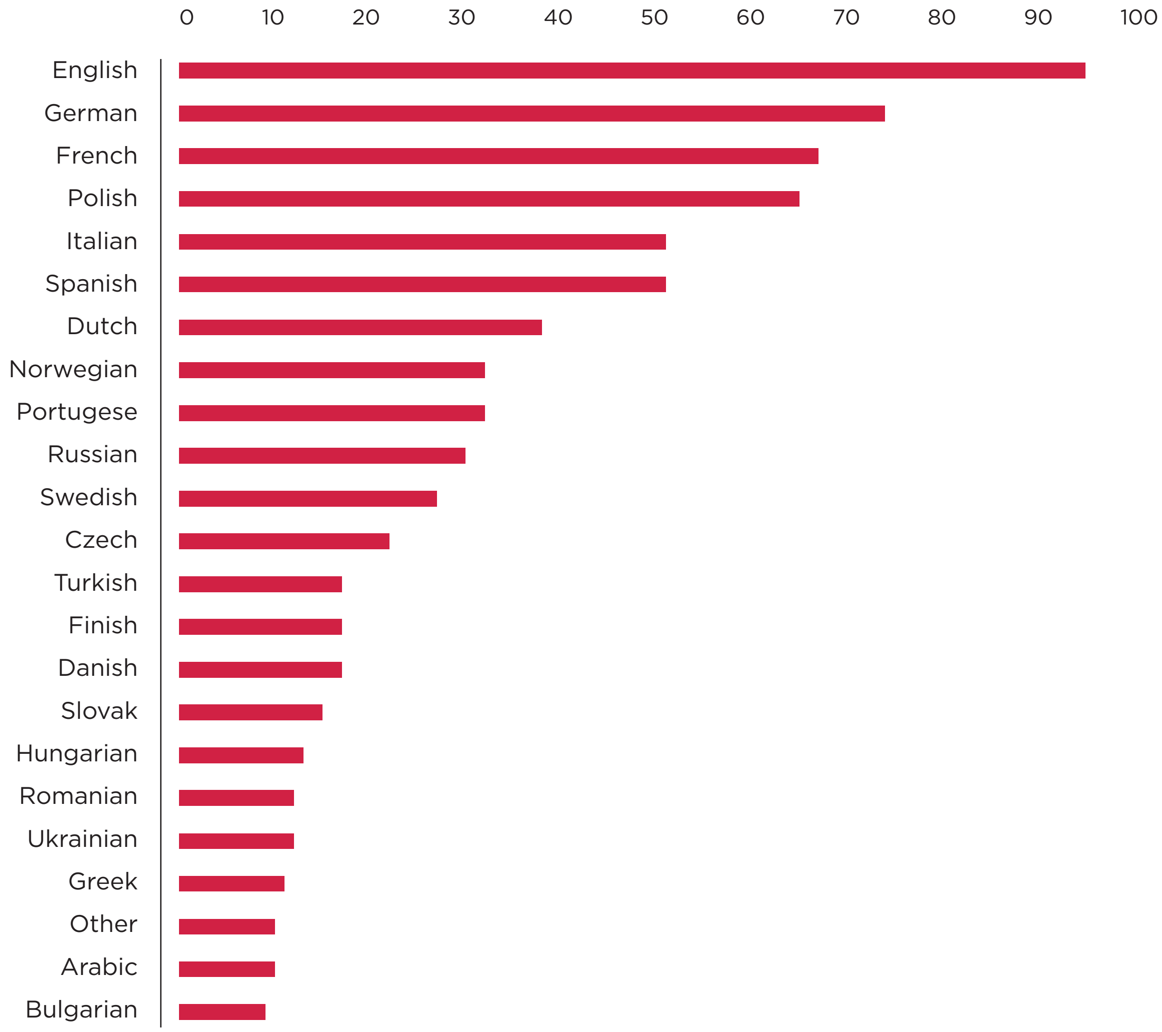

Nordic countries: Denmark, Finland, Norway, Sweden
Asian countries: China, Hong Kong, India, Israel, Japan, Qatar, Singapore, South Korea, Turkey, United Arab Emirates.

Source: ABSL 2022.

The high level of the business services sector in Poland is evidenced by how attractive it is for foreign workers, with the number of foreigners currently employed by centres in Poland being 55,400. This figure represents 13.8% of the industry's total employment.

The growth of the business services sector has also been driven by access to a talent pool with considerable linguistic skills. The most commonly-used languages in the business services centres in Poland are: **English, with 95.1%; German – 74%; French – 68% and Italian 51%**. It is expected that those whose competences combine both language skills and programming/IT skills will dominate in business services centres.

**Graph 6 Languages used in Business Service Centres (%)**




Source: Own data based on Business Service Sector in Poland, ABSL 2022

The top three programming languages at present used in centres are SQL, Java and Python. They are the three programming languages that will be most in-demand in 2023.

2022 already proved to be an excellent year for the modern business services sector but the forecast for the business services centres employment in 2023 is growth to 432,000 employees.

Poland is placed third in the global best computer programmers ranking with a score of 98, coming after China with its score of 100 and Russia with 99.9. Developers from Poland are excellent in Java, which was also the most preferred language among HackerRank users. (HackerRank Study 2021).

**Table 4 Top 10 countries for top computer programmers (2021)**

| | Country | Score index |
|---|---|---|
| 1. | China | 100 |
| 2. | Russia | 99.9 |
| 3. | **Poland** | **98.0** |
| 4. | **Switzerland** | **97.9** |
| 5. | Hungary | 93.9 |
| 6. | Japan | 92.1 |
| 7. | Taiwan | 91.2 |
| 8. | France | 91.2 |
| 9. | Czech Republic | 90.7 |
| 10. | Italy | 90.2 |

Source: HackerRank 2021.

# SALARIES IN POLAND

Despite recent increase, salary cost in Poland are still just a fraction of cost in Switzerland. Nearshoring to Poland enables Swiss companies to significantly lower their remuneration cost. Monthly salaries in particular area of expertise, depend on the location (there might be differences between cities of up to 10%) and languages spoken by the candidates. Usually there is additional monthly bonus for languages other than English totalling 10 – 15% of monthly salary.

**Table 5 Monthly salaries in business services sector (CHF*)**

| Position | CHF |
|---|---|
| Junior accountant / specialist / AML/KYC analyst (up to 1 year of exp.) | 960 – 1350 |
| Regular accountant / specialist / AML/KYC analyst (1-3 years exp.) | 1200 – 1950 |
| Senior accountant / specialist / AML/KYC analyst (over 3 years of exp.) | 1550 – 2650 |
| Team leader | 2050 – 3650 |
| Process / controlling manager | 3100 – 5750 |

*average gross monthly renumeration in a given position, without language bonuses.
Currency exchange rate, 1 PLN = 0.2137 CHF

Source: Hays 2023, recalculated.

Many positions in IT are occupied by contractors. Hourly rates depend on seniority and area of expertise. The most expensive are experienced specialists in the fields of software architecture, cybersecurity, SAP, data or DevOps.

**Table 6 Hourly rates in IT sector (CHF*)**

| Seniority | Software development | Testing | Data Analysis / BI | Cloud | SAP | Security | Infrastructure |
|---|---|---|---|---|---|---|---|
| Junior | 15–21 | 12–17 | 13–26 | 0–0 | 0–0 | 19–28 | 14–21 |
| Regular | 24–34 | 15–25 | 20–33 | 28–34 | 26–42 | 30–38 | 19–28 |
| Senior | 29-47 | 21–28 | 34–48 | 30–48 | 32–61 | 35–49 | 27–37 |

Currency exchange rate, 1 PLN = 0.2137 CHF

Source: Hays 2023, recalculated.

# 6 HIGHER EDUCATION POTENTIAL IN POLAND

## INTERVIEWS WITH SELECTED UNIVERSITIES ON HOW THEY SUPPORT THE BUSINESS SERVICES SECTOR IN POLAND

## HIGHER EDUCATION POTENTIAL IN POLAND

Highly skilled workers are the most significant capital of the Polish economy. A large number of recognised universities provide a pool of well-educated students year after year. The resulting labour market is able to provide rich opportunities for new employees. Stability and safety are key features of the Polish labour market. In 2021, there were registered 608 scientific institutions in Poland and among these, 131 were public HEIs (higher education institutions) and 238 non-public HEIs. 102 entities are research institutes, including 78 institutes of the Polish Academy of Sciences and 59 other scientific organisations. (Eurostat 2023; POL-on 2023). The number of universities in the biggest cities ranged from 20 in Krakow to 85 in Warsaw. (MEN 2023)

The total number of students 2021 was 1,208,028. In the same year, higher education institutions graduated 295,761 students. The largest number of students were studying in Warsaw – 236,710 students.

**Table 7 Total number of HEIs, students and graduates in Tier 1 and 2 cities in 2021**

| Cities of Tier 1 and 2 | No. of HEIs | No. of students | No. of graduates |
|---|---|---|---|
| **Krakow** | 20 | 128,691 | 33,115 |
| **Warsaw** | 85 | 236,710 | 50,473 |
| **Wroclaw** | 25 | 105,839 | 27,462 |
| **Tricity** | 21 | 77,584 | 18,190 |
| **Katowice and the Upper Silesian and Zaglebie Metropolis** | 23 | 82,444 | 16,546 |
| **Lodz** | 24 | 74,737 | 17,949 |
| **Poznan** | 25 | 113,486 | 27,211 |
| **Total** | **223** | **819,491** | **190,946** |

Source: POL-on 2023.

# HIGHER EDUCATION SECTOR SUPPORT FOR NEARSHORING AND BUSINESS SERVICES CENTRES

In general, the business services sector is supported by graduates from four groups of academic subjects:

- Banking, finance and accounting
- Business, economics and data analysis
- IT development studies
- AI studies

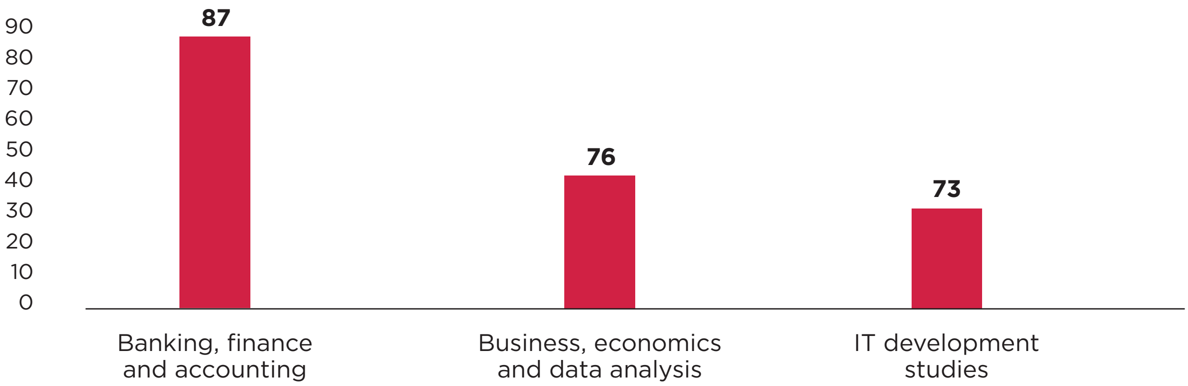
The total number of students in subjects supporting the business services sector is 326,231. Approximately 77% of these students study in Tier 1 and 2 cities. 87% of Polish students studying banking, finance and accounting choose HEIs located in the biggest cites. In the case of business, economics and data analysis the figure was 76% and for IT development studies it was 73% (Eurostat 2023).

**Table 8 Students in academic subject areas supporting the business services sector in Poland and Tier 1 and 2 cities in 2021**

| University subject areas | Total no. of students | No. of students in Tier 1 and 2 cities |
|---:|---:|---:|
| **Banking, finance and accounting** | 65,474 | 56,951 |
| **Business, economics and data analysis** | 153,453 | 116,192 |
| **IT development studies** | 106,989 | 78,209 |
| **AI studies** | 315 | 315 |
| **Total** | **326,231** | **251,667** |

Source: Eurostat 2023

**Graph 7 Students studying subjects supporting the business services sector in Tier 1 and 2 cities – as a percentage of the total number of students in departments supporting the business services sector in Poland in 2021.**




Source: the author's calculation based on Eurostat data

Due to the crucial importance and dynamic growth of the business services sector, studies in the field of artificial intelligence (AI) are becoming increasingly popular. All subjects related to AI studies are delivered at HEIs in Tier 1 and 2 cities. The highest R&D potential in AI relates to three HEIs: Warsaw University of Technology, Wroclaw University of Science and Technology and AGH University in Krakow.

There is also a large number of students preferring education at STEM studies (science, technology, engineering and maths). In 2021 it was around 408,500 students (Eurostat 2023).

Poland's talent pool in the area of IT specialists is represented by approximately 70,000 students.

# INTERVIEWS

## WITH UNIVERSITIES ON HOW THEY SUPPORT THE BUSINESS SERVICES SECTOR IN POLAND

Polish HEIs offer a wide range of degrees supporting the business services sector: BA and MA level programmes, postgraduate studies and MBA studies. All public and private HEIs, universities and universities of technology offer a wide range of studies related to the business services sector: banking, finance and accounting, business, economics and data analysis and IT development.

**Professor Maciej Szymczak**

**Vice-Rector for Development and External Relations Poznan University of Economics and Business**

The Poznan University of Economics and Business (PUEB) plays a significant role in the training of BPO/SSC workers in Poznan. The University offers a variety of degree programmes – both bachelor and master – whose graduates are then ready to take up jobs in the business services sector. The following degree programmes from PUEB's portfolio are particularly promising in this regard: Computer Science and Econometrics, Accounting and Corporate Finance, Finance (in English) or Audit and Control. The degree programmes we provide have international accreditations (ACCA, CFA) and our students can receive internationally recognized certificates (e.g. CIMA).

The PUEB also offers over 70 post-graduate programmes. I would like to draw attention to the following post-graduate programmes in particular: Accounting and Financial Management, IT Audit, Banking and Financial Consulting, E-marketing, Logistics and Supply Chain Management in Industry 4.0, Accounting and Finance, Accounting and Taxes, HR and Payroll, Investment Management in the Construction Sector, Project Management and IT Project Management.

We always listen to the opinions of employers; we engage them both in the process of developing curricula and their subsequent modifications, and invite business practitioners to run classes while maintaining research-based teaching with the use of the latest research results of our scholars. *With a sense of social responsibility, we conduct innovative research and educate leaders of the future* – as it is put in the PUEB mission statement.

**Arkadiusz Michał Kowalski DSc, Associate Professor**

**Deputy director of the World Economy Research Institute Warsaw School of Economics (SGH)**

The Warsaw School of Economics (SGH) is an innovative economic university developing creative intellectual potential and educating leaders to face the challenges of the future, with a strong focus on cooperation with business. The extremely dynamic growth of the business services sector and its further potential, especially in Warsaw, prompts us to expand our offer of studies to improve the qualifications of BPO/SSC workers.

Undergraduate programmes include finance and accounting, logistics, quantitative methods in economics and information systems. On the master's degree programmes, in addition to those listed at the first-degree level, there are also advanced analytics – including Big Data, finance and accounting with accompanying ACCA qualifications.

The Warsaw School of Economics also offers an impressive number – 140 - of postgraduate programmes and four MBA programmes. These include studies supporting the business services sector: finance and accounting (audit, banking, international finance, taxation, accounting and controlling, insurance, financial management, risk management), digital transformation (business analytics, Big Data and robotics, cyber security, artificial intelligence, IT management), management (international economic innovation and start-ups, marketing and CSR, shipping, logistics, project management).

At the same time, the Warsaw School of Economics offers unique training programmes aimed at companies, with full-time and online training courses conducted by its professors and specialists.

**Joanna Kuczewska, DSc, Associate Professor**

**Coordinator of International Relations Faculty of Economics, University of Gdansk**

A specialisation in Business Intelligence in the Open Economy has been launched at the Faculty of Economics of the University of Gdansk. This is in response to the needs of the labour market, especially the modern business services sector, which is developing dynamically in Poland. This development is reflected in employment dynamics – more rapid than for the business sector in general – but also by qualitative changes. Tricity is a location with high growth dynamics in this sector, represented by centres of modern business services. Within the framework of the specialisation, a package/mix of subjects is offered – related to both "soft skills" and those strictly related to working with data.

In the course of study, the student acquires knowledge and skills in: data processing, information system creation based on relational databases, data transformation for effective application in strategic decision-making in business processes, market analysis for the implementation of business solutions or behavioural modification, as well as the use of statistical and econometric methods for research tasks.

These qualifications are highly valued in the current labour market – and not only by companies in the Tricity area but also in other locations, including work-from-home or work-from-anywhere modes.

**Professor Marek Ćwiklicki**

**Head of the Department for Management of Public Organisations Collegium of Economy and Public Administration Krakow University of Economics**

The Global Business Services studies were launched on October 4, 2021. At that time, 90 students began academic classes at the Krakow University of Economics in cooperation with companies in the global business services sector, including: ABSL, ABB, Abbvie, Accenture, AMS, Amway GBS, BBH, CISCO, EY, Genpact, Heineken Krakow, Hitachi, HSBC, IBM, Jacobs, Kimberly-Clark, Motorola Solutions, Opus B, Qurate Retail Group, Random Forest, Schell, State Street, Talent Alpha, The Hackett Group, UBS and VRP Consulting.

The Global Business Services degree programme (BA level) has three teaching tracks to choose from, corresponding to the needs of the modern business services sector: international project management, business analytics and brand management. Business partners are involved from the outset in curriculum design and their participation continues in academic classes. In addition, the curriculum is dominated by a workshop format complemented by new activities for students, such as research projects where students focus on the global BSS.

The Master of Global Business Services was confirmed by the Senate of the Krakow University of Economics in 2023. This programme is delivered entirely in English. The option was created for students planning to start their careers in multinational corporations but who lack a business administration background. We hope that the extension of the offer to new candidates, both Polish and foreign, is a model of business-university cooperation, making possible the tailoring of education to the expectations of the contemporary job market.

# 7 PUBLIC AUTHORITY SUPPORT FOR THE BUSINESS SERVICES SECTOR

The Polish Investment and Trade Agency (PAIH) is a government agency specialized in supporting international investment and trade. PAIH's main business supporting activities are as follows: assistance in applying for funding, assistance in contacts with public administration, real estate offers, audits, and advisory, conference space rental and B2B networking and workshops (PAIH 2023).

Government grants are provided on the basis of the "Programme for supporting investments of major importance to the Polish economy for the years 2011-2030" (employment and investment grants). The programme supports investment projects to develop the innovative potential and competitiveness of the Polish economy. It lays down conditions for the payment of the cash grant, paid proportionately to the degree the investor's commitments are fulfilled.

Co-financing may be provided for:

- production investment – minimum investment costs: PLN 160 million, minimum number of new jobs: 100
- production investment resulting in a product or process innovation constituting a novelty on a national scale – PLN 7 million, 20
- investment in the sector of modern business services, providing R&D services, conducting scientific R&D projects – PLN 1 million, 10
- investment in the sector of modern business services, at least medium advanced processes – PLN 1.5 million, 250
- investment in the sector of modern business services, only advanced or highly advanced processes – PLN 1.5 million, 150

In addition, to provide support at a national level, local authorities are implementing their own projects to support investment in main cities and regions in Poland. Examples of initiatives implemented in Tier 1 and Tier 2 cities are shown in the table below.

**Table 9 Public authorities' initiatives supporting businesses in Tier 1 and 2 cities**

| Region | Supporting organisations | Projects |
|---|---|---|
| **Mazovia** | Warsaw City Hall Investor Cooperation Division | Information activities:<br>Support in obtaining office space<br>Recruitment activities<br>Ways to support investors: individual approach, assistance at every stage of the investment process, including organization of reference visits, administrative support, provision of necessary information. |
| **Lesser Poland** | Krakow City Hall | The Investors and Innovative Economy Support Centre:<br>Access to the network of institutions and coordinating cooperation with the biggest universities<br>Real estate tax exemption<br>Support during the investment process |
| **Lower Silesia** | Wroclaw Agglomeration Development Agency (ARAW) | The owners are the Municipality of Wroclaw and 32 municipal authorities from the area of the agglomeration. ARAW's goal is to attract foreign investors, thereby creating new jobs and economic growth in the region. |
| **Pomerania** | Pomerania Development Agency | Invest in Pomerania: an NGO supporting foreign Investors<br>International BSS Forum: annual conferences, exchange of expertise and experience in business services support |
| **Silesia** | Investors Assistance Department<br><br>Business Incubator Rawa. Ink | Market analysis<br>Marketing support<br>Access to the network of institutions and coordinating cooperation with the biggest Silesian universities<br>Real estate tax exemption<br>International Business Incubator together with partners from Saint-Etienne (France), Monastery (Tunisia), Tamatave (Madagascar) and Sierre (Switzerland). The project aims to internationalize local enterprises to countries included in the project. |
| **Lodz** | Łódź Special Economic Zone<br><br>Lodz City Hall, The office of investor service and foreign cooperation | Tax reliefs (state aid), income tax exemption, possible real estate tax exemption, financial support for infrastructure development. The main activities that are supported under state aid are production, BPO/SSC/IT and R&D<br>Supporting activities: property issues, recruitment support, meetings, cooperation and networking and company PR activities. |
| **Greater Poland** | Poznan City Hall, POZnan* | Invest in Poznan: support during the investment process and access to the network of institutions. |

Source: the author's analysis based on public authority internal resources

# 8 OFFICE SPACE AVAILABILITY IN KEY POLISH CITIES

Poland has become the leader in the Central and Eastern Europe office market. At the end of 2022, the total stock of A-class office space in Tier 1 and 2 cities reached nearly 12.3 million sqm. Warsaw was the largest office market, with over 6.3 million sqm of office space. Developers completed more than 624,000 sqm of office space in Tier 1 and 2 cities, of which 38% was in Warsaw. (Colliers 2023).

**Table 10 Office space – main indicators (2022) in Tier 1 and 2 cities**

| City | **Total office stock** (sqm) | **New supply** (sqm) | **Vacancy rate** (%) | **Space under construction** (sqm) | **Office demand** (sqm) | **Rents** (EUR/sqm/ month) |
|---|---|---|---|---|---|---|
| **Warsaw** | 6,268,800 | 236,800 | 11.6 | 209,000 | 860,100 | 12.50 – 27.25 |
| **Krakow** | 1,708,000 | 100,500 | 16.0 | 107,200 | 198,100 | 13.50 – 16.50 |
| **Wroclaw** | 1,327,900 | 65,700 | 15.6 | 168,600 | 137,200 | 13.50 – 15.90 |
| **Tricity** | 1,012,100 | 50,600 | 13.3 | 69,600 | 101,000 | 13.50 – 15.50 |
| **Katowice** | 726,000 | 127,300 | 17.1 | 129,200 | 62,700 | 13.00 – 16.95 |
| **Lodz** | 631,000 | 43,300 | 21.0 | 16,700 | 48,400 | 13.00 – 14.00 |
| **Poznan** | 623,100 | 0 | 10.5 | 68,800 | 46,500 | 13.25 – 16.25 |
| **Total** | 12,296,900 | 624,200 | | 769,100 | 1,454,000 | |

Source: Colliers 2023

# 9 DIRECT FLIGHTS FROM SWITZERLAND TO POLAND

Direct flights from Switzerland to Polish cities run between Zurich and four Tier 1 and 2 cities: Warsaw, Krakow, Gdansk and Wroclaw. In addition, direct flights from Geneva to Warsaw are available with PLL LOT and from Basel to Krakow with EasyJet Switzerland. Non-direct flights are operated to the remaining Tier 1 and 2 cities: Lodz, Poznan and Katowice. The most common connecting cities are Warsaw and Munich.

**Table 11 Direct flights from Zurich, Geneve and Basel to Polish cities of Tier 1 and 2**

| | Warsaw | Krakow | Gdansk | Wroclaw |
|---|---|---|---|---|
| **Zurich** | direct,<br>*daily*<br>Swiss, LOT | direct,<br>*several times per week*<br>Swiss | direct,<br>*several times per week*<br>Swiss | direct,<br>*twice a week*<br>Swiss |
| **Geneva** | direct,<br>*daily*<br>LOT | | | |
| **Basel** | direct,<br>*several times per week*<br>WizzAir | direct,<br>*several times per week*<br>EasyJet Switzerland | | |

Source: Airports flights network maps and flights schedules

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