

The Poznań experience!

Business services sector in Poznań - analysis, challenges, and trends



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About the report

This report was prepared in cooperation with the City of Poznań and the companies: Cpl Poland and Colliers. The report presents Poznań in terms of the city's investment attractiveness for companies in the modern business services sector, including the possibility of support from local units of the City Hall. The publication also includes a discussion and analysis of the Poznań labour market and real estate potential in the context of office space.

In addition, two surveys were carried out as part of the report: one addressed to companies from the modern business services sector, the second to the employees who at the time of the study were employed in companies in this sector in Poznań. In total, over 50 companies and almost 500 employees were surveyed.

Only responses with all questions answered were analysed. The questionnaires of both surveys contained the following types of questions: closed, open and multiple-choice questions. In all cases, an answer was required to proceed to the next question and to successfully complete the survey. That way, the problem of missing data in the questionnaires was eliminated. The results of the study were analysed only in summary reports. The survey was conducted at the turn of the months: March - April - May 2023. We would like to thank all companies and employees who joined this project and took part in the survey.

The involvement of both companies and employees from the modern services sector in this research allowed to update our knowledge about the dynamics of the development of the industry in Poznań and, more importantly, to adapt solutions to activities supporting the development of this sector in the city.



**1 million inhabitants
of the Poznań
agglomeration**



**146 companies
from the modern
business services
sector**



**+ 27,000
employees in the
modern business
services sector**



**50 foreign
languages that can
be studied in
Poznań**



24 universities



**+ 24,000 university
graduates per year**

Poznań - introduction

Modern business services is one of the most rapidly growing economic sectors in Poland. In recent years, the sector has proven that it is able to react quickly and excellently to crises, developing solutions that enable the continuation of started business processes and projects. Poland is still one of the most attractive locations for centres in this sector.

Poznań is a city where the modern business services sector has been developing rapidly for almost two decades. Centres that started with simple processes and now run technologically advanced projects are operating here. When deciding to open an enterprise in Poznań, new investors emphasise the advantages that the city has.

Poznań's most important asset are its people - the talented, ambitious, and enterprising people of Poznań, characterised by an extraordinary work ethos. More than 127,000 entities are conducting business in the city.

Every fifth resident of Poznań is a student. There are 24 higher education institutions in the city, providing high quality education in such fields as economics, philology, and technology. The scientific activities of the universities are complemented by dozens of research and development institutions.

The attractive location of the city, especially its proximity to Berlin and Warsaw, makes Poznań an important business centre not only on the Polish map, but also in Europe. Its convenient location is an attractor for foreign entities to the city.

As a city, we are also distinguished by a wide range of commercial properties - modern office spaces, which nowadays serve not only as workplaces, but above all as places for integration meetings and coworking spaces.

These assets, combined with the high quality of life of the inhabitants, prove Poznań's attractiveness for the modern business services sector.

I invite you to read a report prepared in cooperation with Cpl and Colliers, which is an analysis of the modern business services sector in Poznań and its current trends, real estate market and challenges in the labour market.



Jacek Jaśkowiak
Mayor of the City of Poznań

POZnań*



Message from Investor Relations Department

Poznań's economy is characterised by diversity. The first companies representing the modern services sector appeared in Poznań in the 2000s. These were mainly financial and accounting centres, handling simple transaction processes. The industry saw significant developments in the period between 2017 and 2022. During this time, the number of companies in Poznań has grown to over **145** and the number of employees has expanded from 15,000 to over **27,000**. The profile of the centres has also changed – those already operating in Poznań have begun to transform into global service centres, while new ones have introduced processes related to IT, HR or customer service. It is also worth noting the fact that the Poznań-based centres have started to take on more complex, knowledge-based processes, which contributed to the search for highly qualified employees in the labour market.

Of the 146 companies in Poznań, the majority are shared service centres. There is an increasing number of companies performing IT-related processes. BPO centres account for 15% of all companies, and the number of R&D companies is also on the rise (11%).

The average number of employees in Poznań centres is 170 people, 10 companies have a staff of over 500 employees, with 1,500 people working for the sector's largest employer. Most of the companies participating in the survey indicated that they plan to increase employment by 30% in 2023.

Poznań is a city where, at the university level, it is possible to study over **50 foreign languages**.

This contributes to attracting investors to the City, who employ specialists with knowledge of niche languages, such as Hebrew, Chinese, Arabic, and the Poznań-based centres use over **30 foreign languages**.

Poznań universities, seeing the potential of the sector, develop not only language majors but also expand their offer of economic studies, in the field of banking, as well as IT. Every year, more than 24,000 graduates leave the walls of Poznań's universities, showing the strength of Poznań's labour market. They are also attractive candidates for work in the modern services sector.

Investor Relations Department, responsible for cooperation with potential and present investors on the Poznań market, has noted an increase in the importance of the modern services sector on the local labour market, as well as new trends and market requirements. The Department makes efforts to promote its potential through several projects addressed to various groups of recipients.

The **BPO/SSC Week** is an event that allows secondary school students to learn about opportunities in the modern services industry. The "Week" pairs schools with BPO/SSC companies. Students attend a lecture given by a company representative and then visit the company's headquarters during a specially arranged open day.

For IT professionals, Investor Relations Department is organising **the #pozitivetechnologies Conference**. The event, which was established in 2019, is a one-day, hybrid model conference, focused on the most innovative trends in the IT industry. It was created in response to demand from Poznań employers. The conference's partners include the largest IT companies operating in Poznań. The event aims to promote Poznań as an important IT centre that brings together professionals in the sector, attracts top employers and creates a strong and active IT community. The Positive Technologies Conference is one of the most important events organised by the City of Poznań.

Pracuj w Poznaniu (Work in Poznań) is a publication of Investor Relations Department, prepared for the autumn edition of the job fair. The folder contains company descriptions and current job offers for students or graduates just starting their careers, experienced employees, but also for people who want to change their careers. Companies looking for interns or apprentices, as well as those employing foreigners without (or with very basic) Polish language skills, are marked with the relevant symbols.

To promote Poznań's unique asset - its educational offer in the field of foreign language teaching - a project called **Poznań na Językach** (Poznań in Languages) was established - a translation competition organised by the Council for Education of the School of Language and Literary Studies at the Adam Mickiewicz University in cooperation with the City of Poznań and representatives of the modern services sector. The result of the competition was the selection of the best student translation of two texts on the subject of Poznań into languages that can be studied at the Poznań-based University, and a publication featuring the texts of the translations, as well as business cards of companies offering jobs for philology graduates.

Investor Relations Department also sees the development of creative industries in Poznań. **Let's Play in Poznań** is a catalogue created to promote and support the growing game dev sector and attract new investors. It includes data on local gaming studios, game development majors, and sector initiatives.

The above figures show that Poznań's modern services sector is steadily developing, and new players can still find space in the city.

Author:

Investor Relations Department

"Investor Relations Department keeps a close eye on emerging trends and requirements in the modern services sector. We try to adapt our activities to the new needs of investors. According to investors, the intellectual potential, the academic nature of Poznań, and cooperation with universities determine its choice as a location for businesses. In response, we are seeking to promote the sector to students and to deepen cooperation with Poznań universities. We connect the worlds of science and business, organise events together and participate jointly in projects that promote the economic potential of Poznań. We are pleased that entrepreneurs appreciate the work and contact with us, as well as the city's efforts to improve its residents' quality of life. Poznań's residents are our greatest asset, which is why the City strives to be as attractive as possible to potential residents. All companies participating in the survey answered in the affirmative when asked if they would recommend Poznań to other investors. For us, this is the best proof that our activities are not only impactful but above all effective. Let's experience Poznań together!"



Katja Ložina

Head of Investor Relations Department,
Poznań City Hall

POZnań*

Investor Relations Department in a nutshell

Investor Relations Department is responsible for providing comprehensive services to investors in priority industries for Poznań and promoting the economic potential of the city. As part of its activities, the Office offers support to investors on a one-stop shop basis.

How does this look like in practice?



Quality of life



Employer Branding

help creating the employer image in the Poznań labour market by:

- organising press conferences, distributing materials to local media,
- using social media Invest in Poznań and the website <http://www.poznan.pl>,
- implementation of non-standard solutions in order to recruit the best employees, e.g. organisation of events, competitions for candidates for specific positions,
- assistance in establishing contacts with universities and career offices run by universities,
- support for the investor's cooperation with the universities, e.g. creating or adapting course programmes to the investor's needs,
- free assistance from the Powiatowy Urząd Pracy (District Employment Office).

Poznań in numbers

1. Human potential:

545,000 inhabitants of Poznań

670,000 people staying in Poznań on working days

1 million inhabitants of the Poznań agglomeration

2. Scientific potential:

24 universities

102,500 students

24,500 graduates

+50 number of foreign languages that can be studied in Poznań

+7,000 foreign students

Students/graduates of majors important for the modern services sector:

- **philological studies** – **8,400** students/**1,500** graduates
- **engineering studies** – **6,900** students/**1,770** graduates
- **IT studies** – **6,350** students/**1,350** graduates
- **Business and administration** – **22,000** students/**5,700** graduates

3. Modern services sector environment:

146 companies

over **27,000** employees

thriving Chapter **ABSL**

4. Location:

A2 motorway

3 h distance by car/train from Berlin and Warsaw

over **80** flights from Poznań Ławica airport

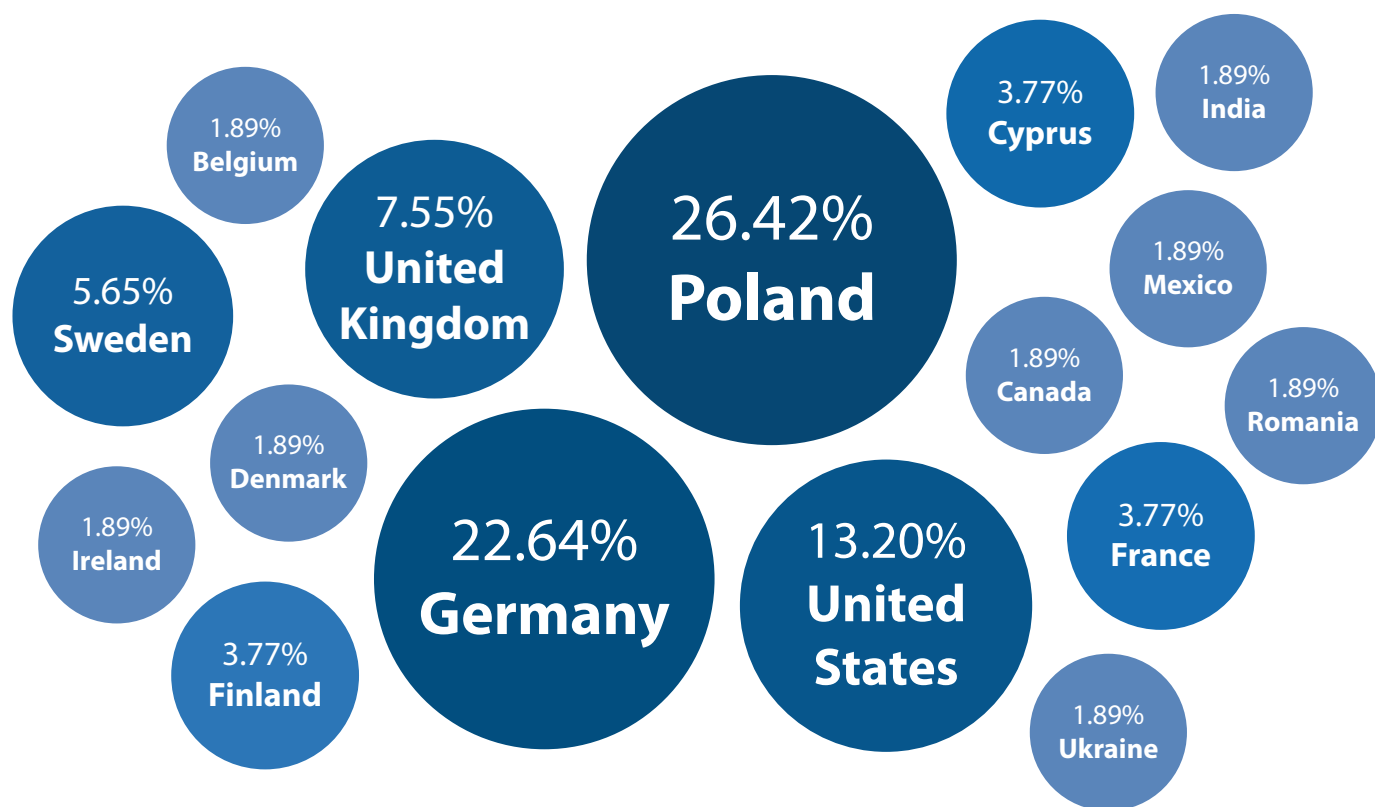
and over **2.25 million** passengers served in 2022

Survey of Investor Relations Department and Cpl Poland

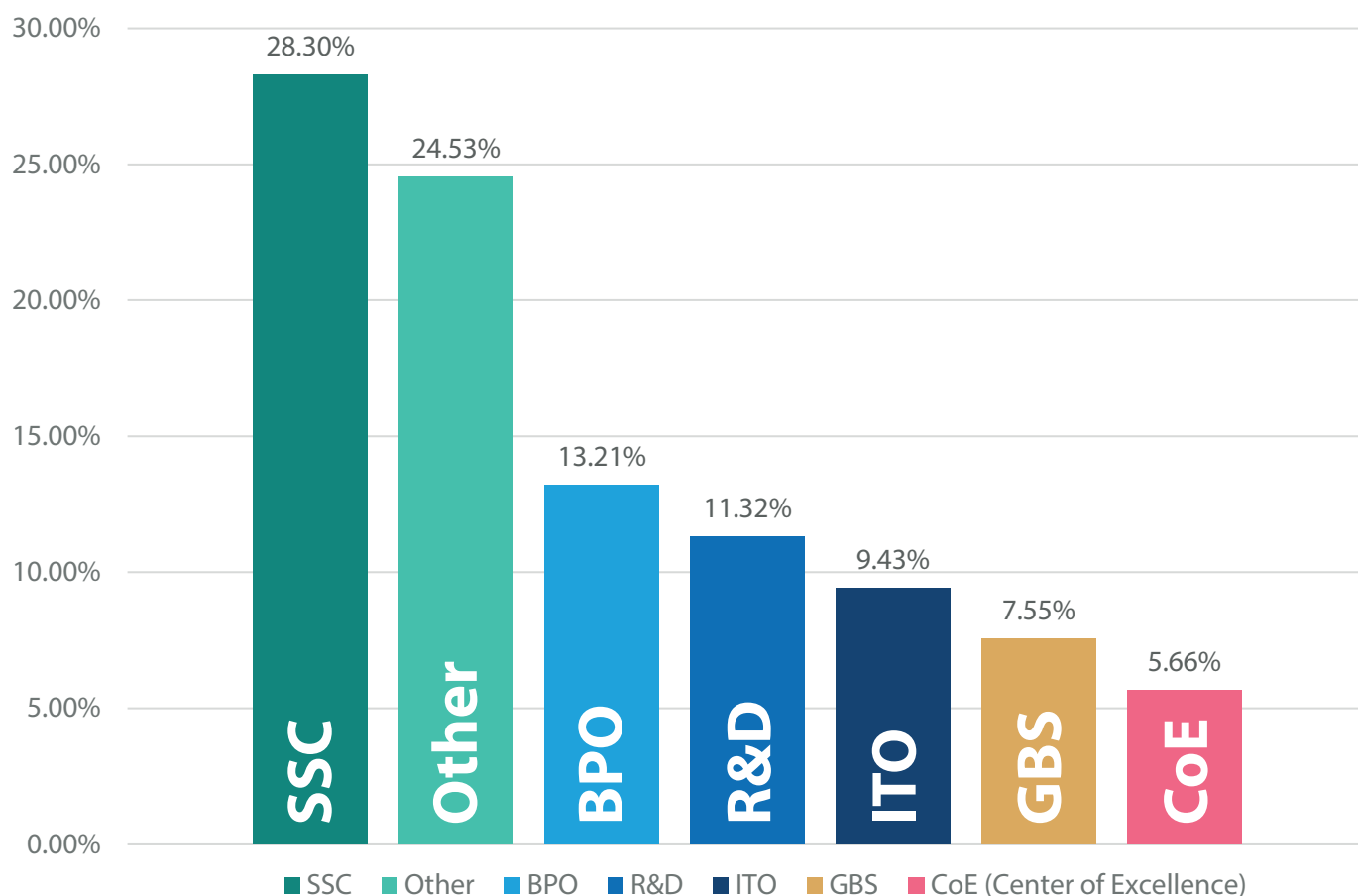
Cpl Poland and Invest in Poznań prepared a survey on the investment potential of the City of Poznań among the companies in the business services sector.



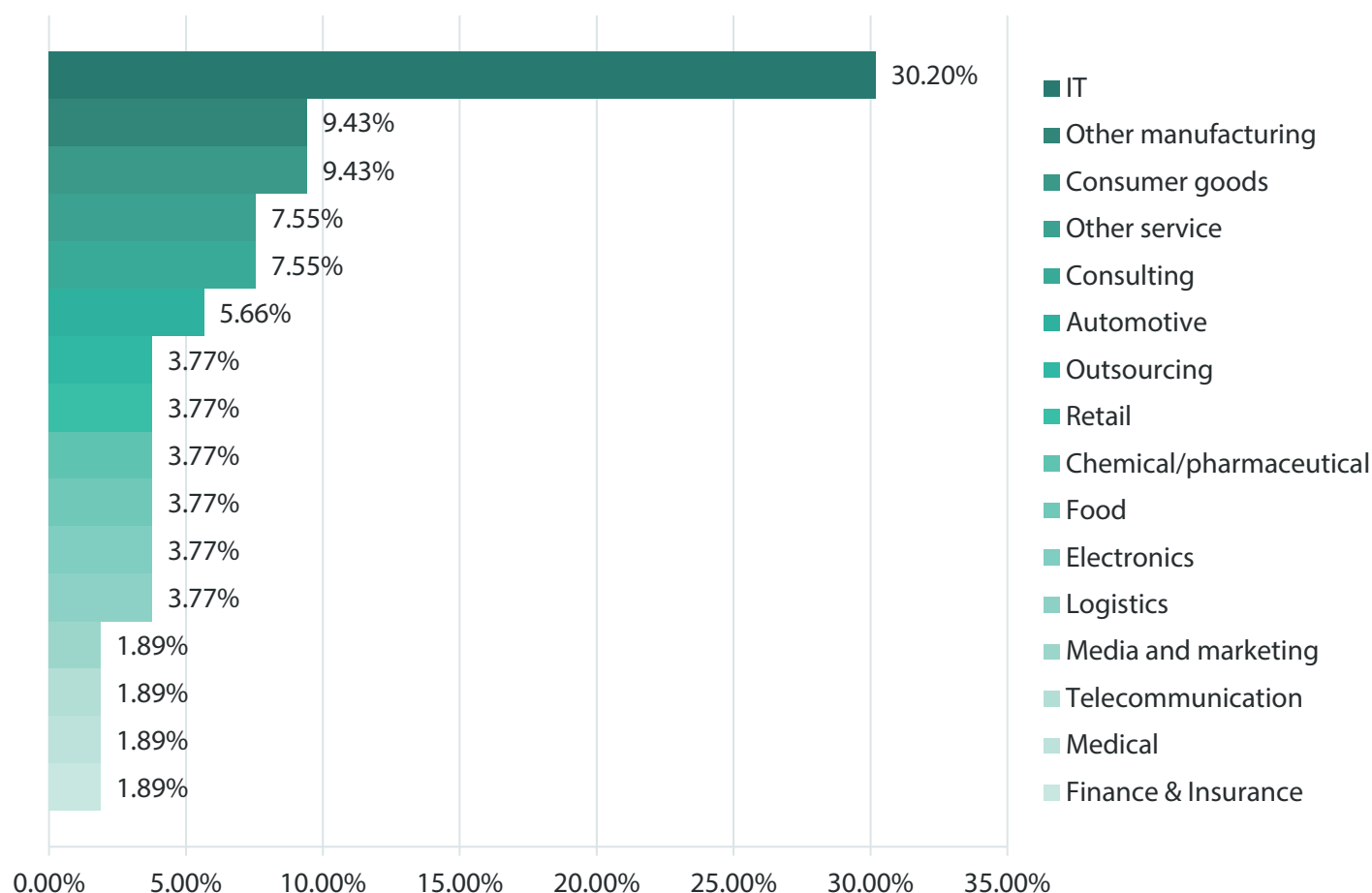
Country of origin of the company's capital:



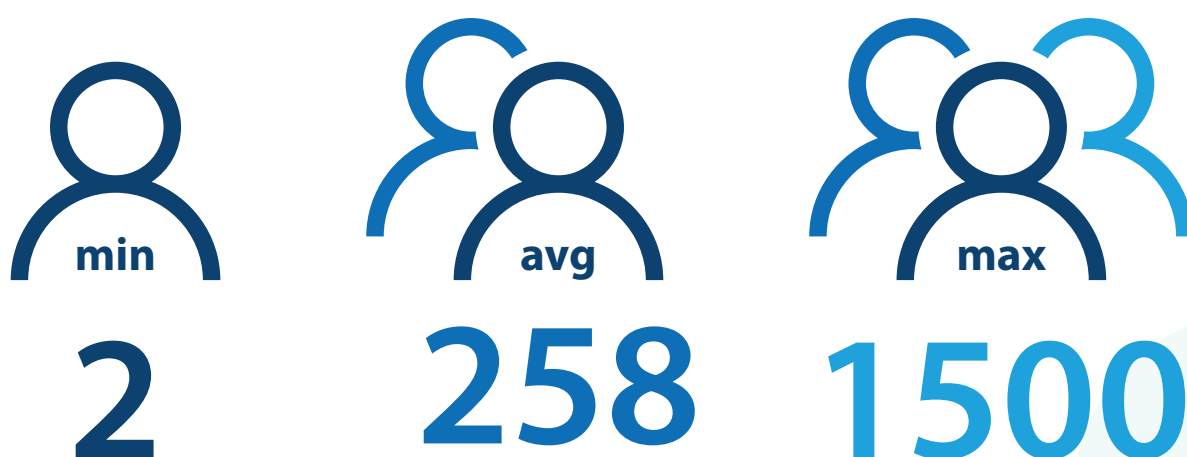
Type of company activity:



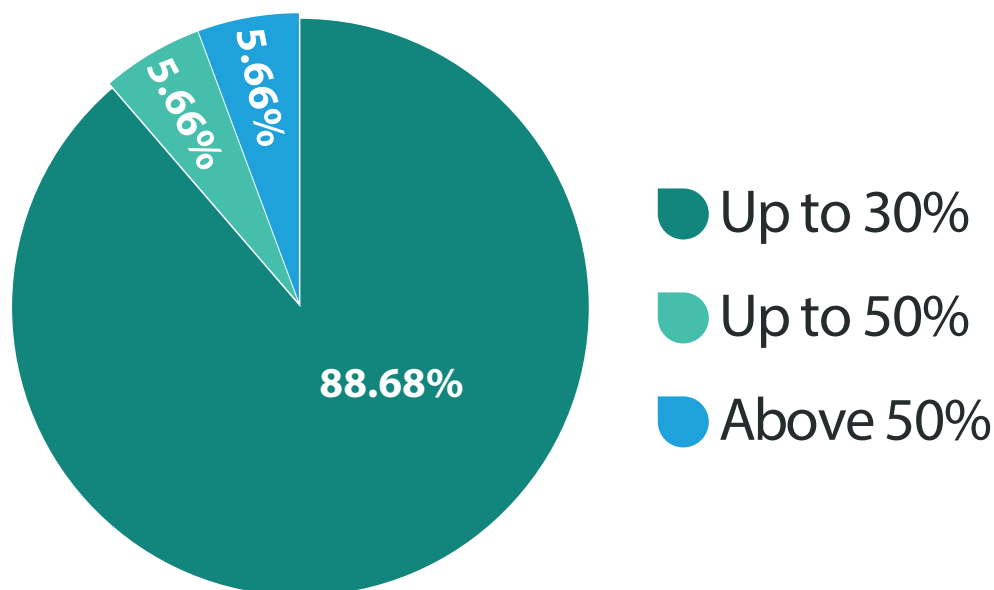
Industry sector of the parent company:



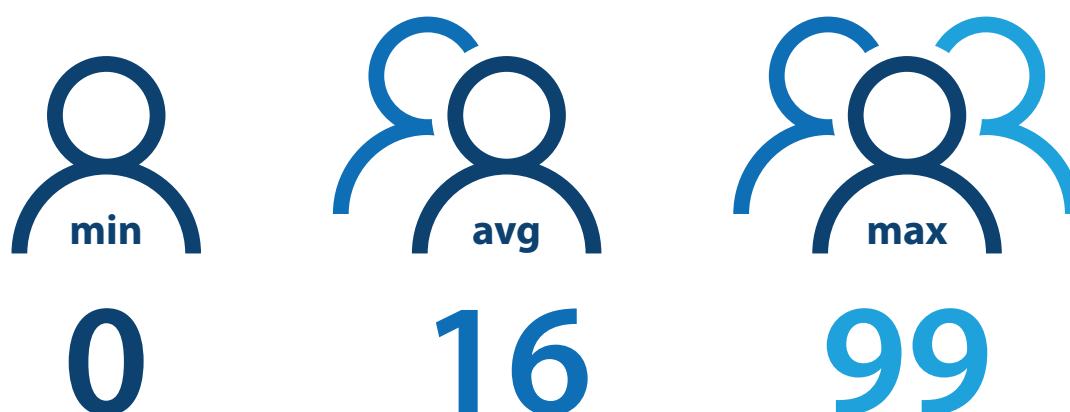
The number of people employed at the Poznań branch of the company:



Projected growth in the branch in Poznań in 2023:



How many non-Polish nationals are employed in your company in 2023 (as a percentage of total employment)?



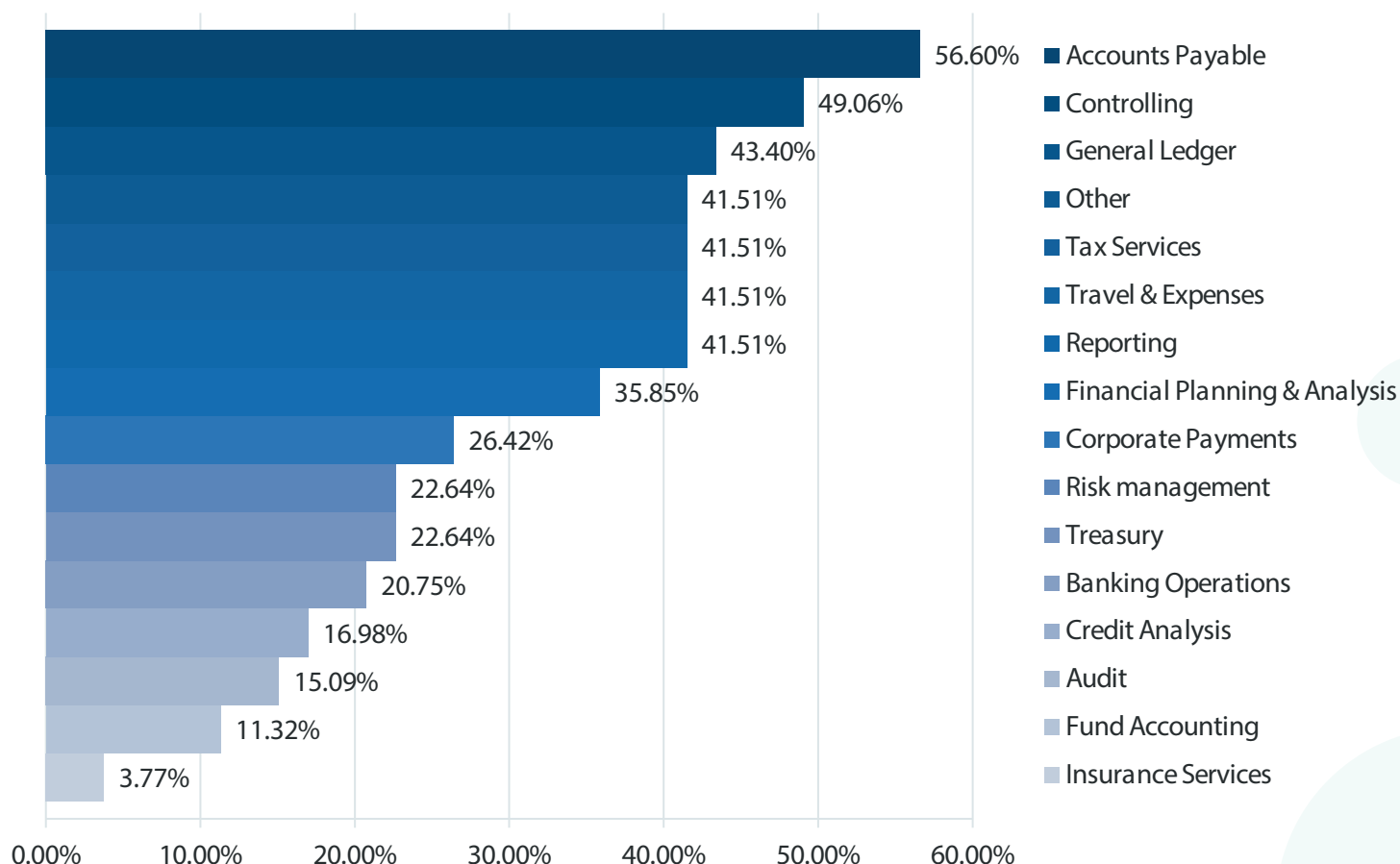
Does your company work in a shift system?



“24.53% of the modern shared services centres work in shifts, which may reflect the handling of business processes from distant countries - such as Canada or the USA - as well as the handling of European processes providing 24-hour services. The shift work system is particularly attractive for students, who can combine studying and working thanks to this solution. However, the vast majority of centres, as much as 75.47%, do not work in shifts, which is certainly a very good solution for people who appreciate the standard work rhythm.”

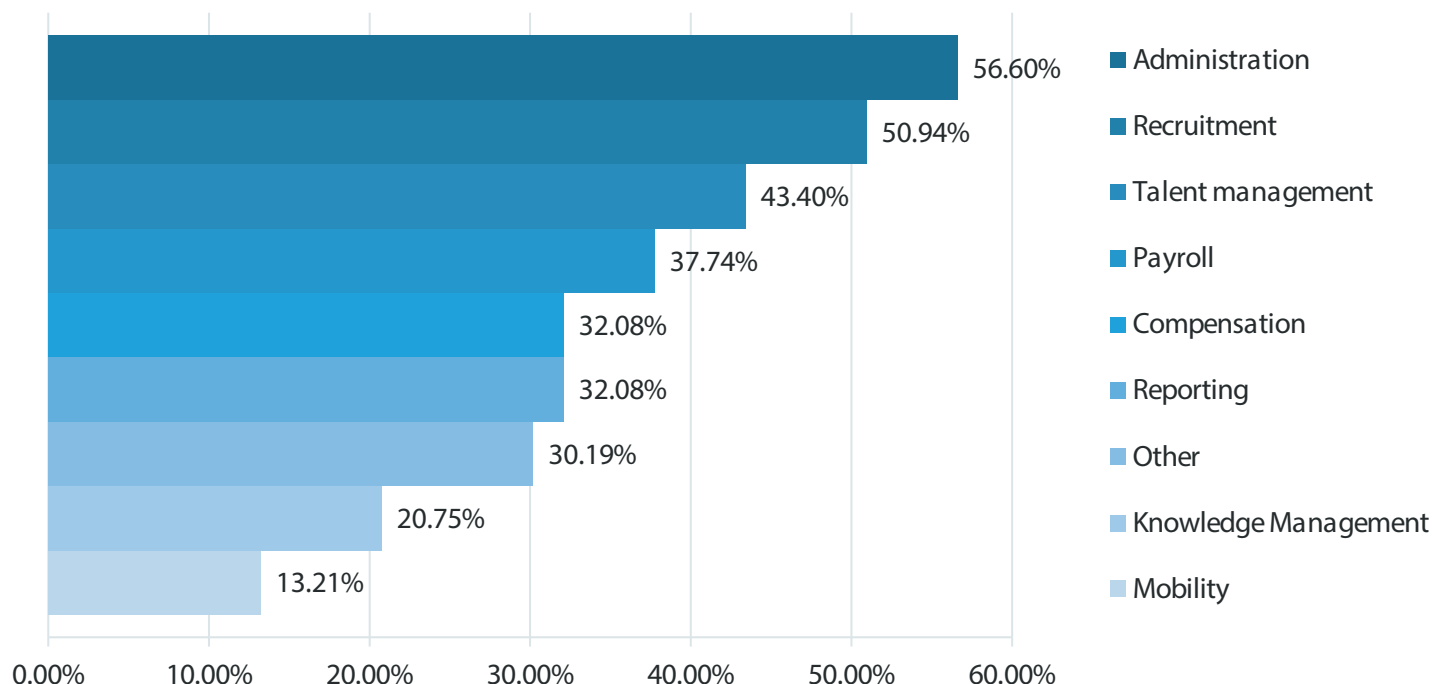
Processes overseen from Poznań:

• Finance & Accountancy



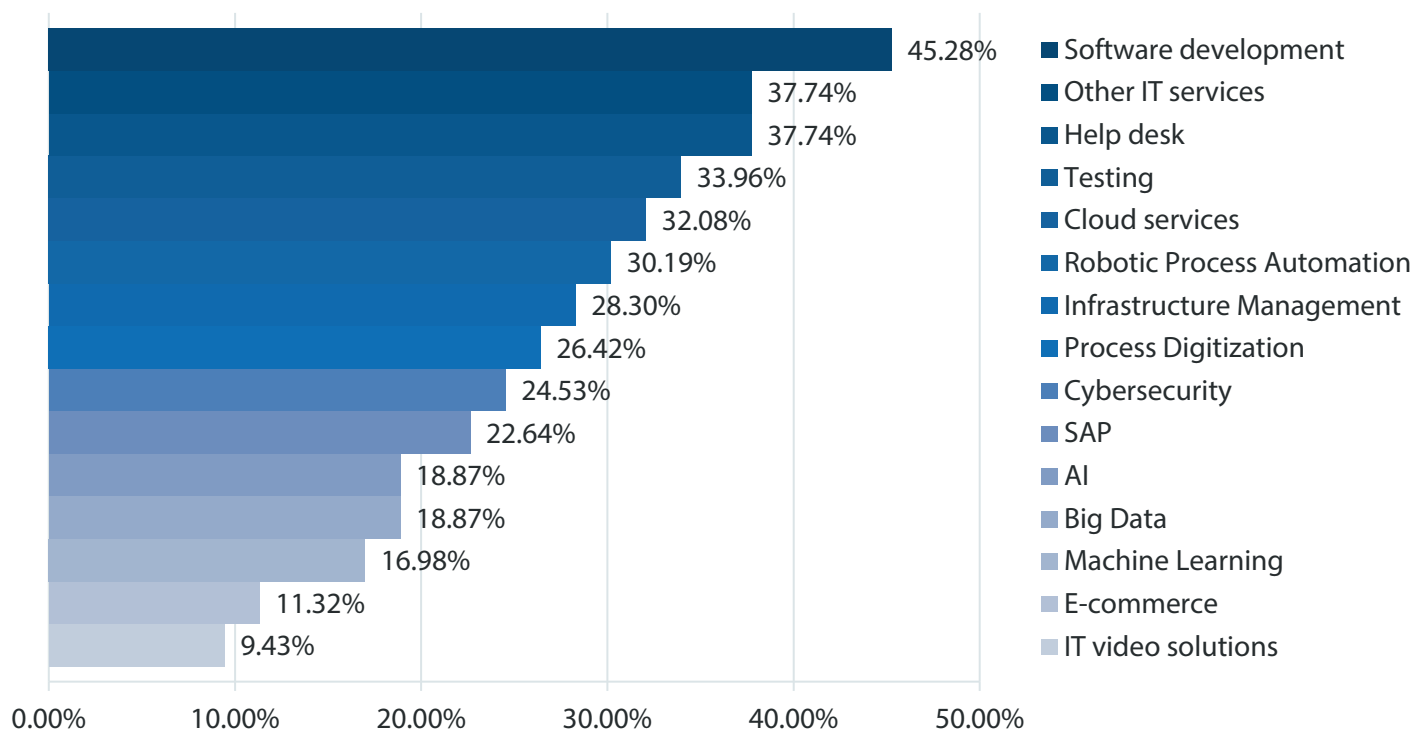
Processes overseen from Poznań:

• HR



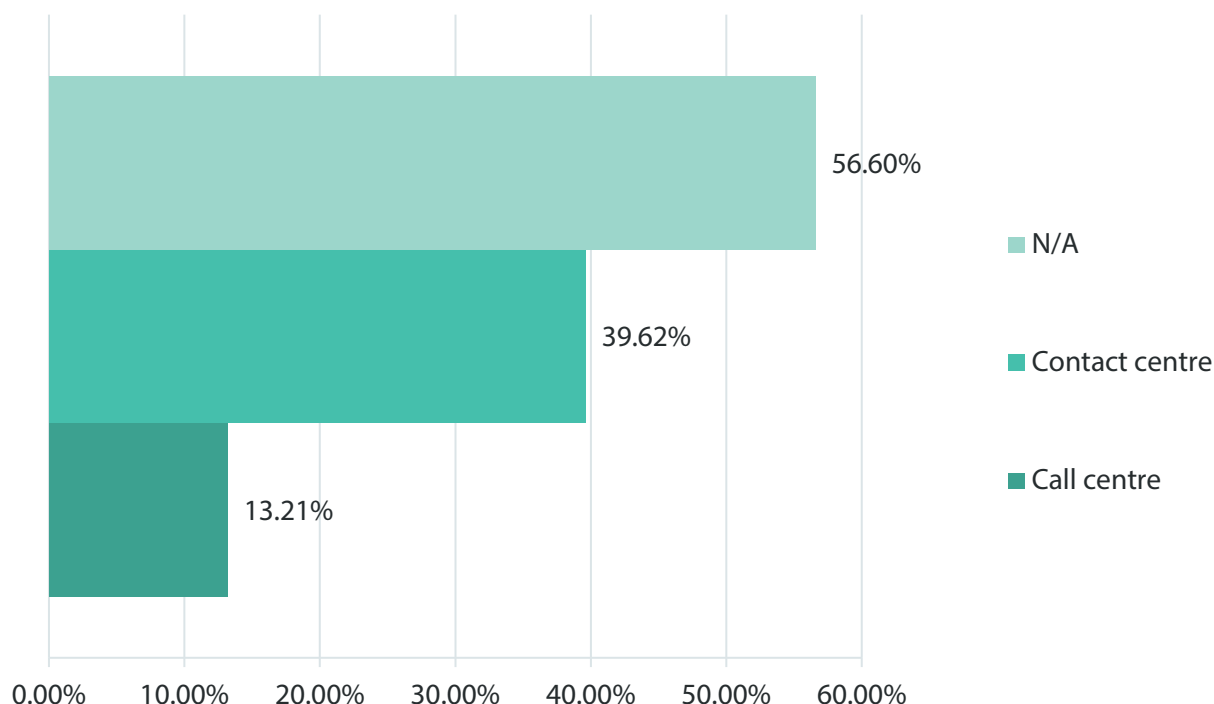
Processes overseen from Poznań:

• IT



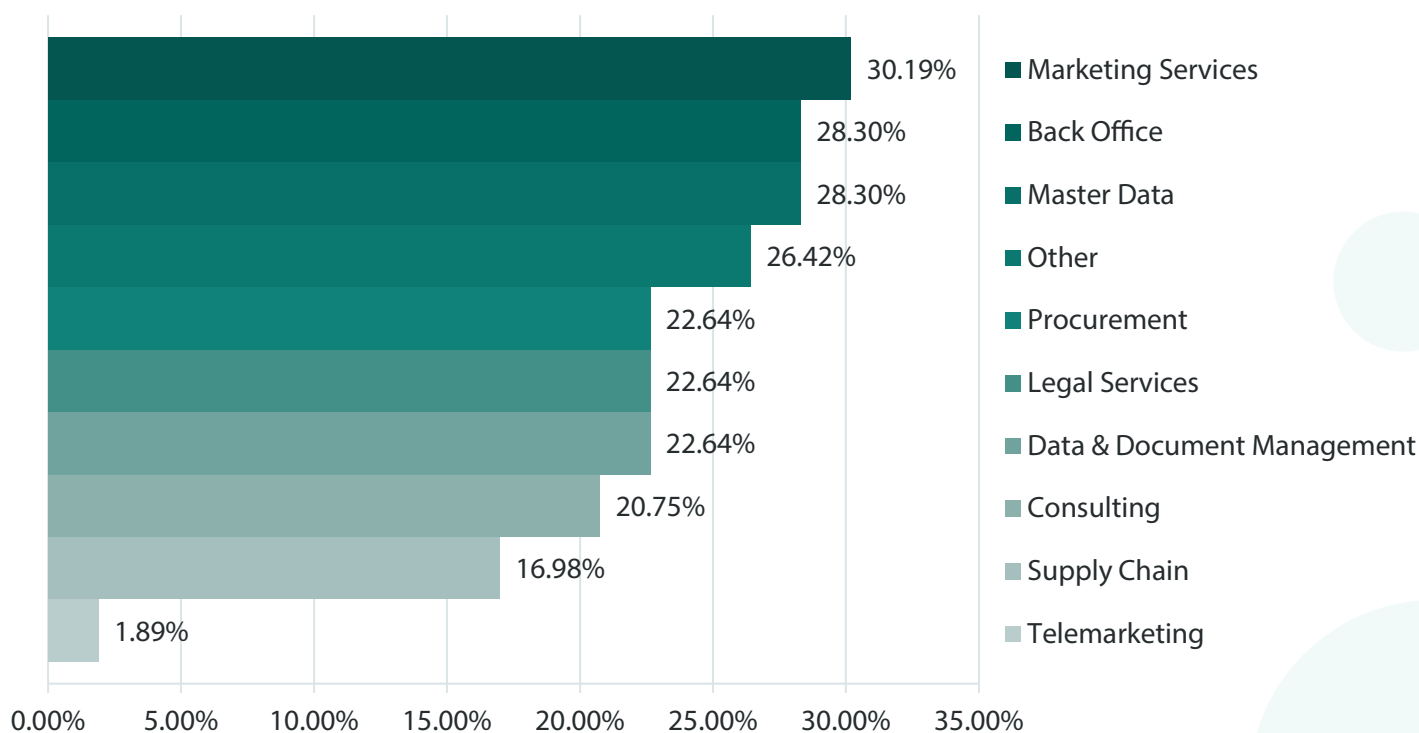
Processes overseen from Poznań:

• Customer Service

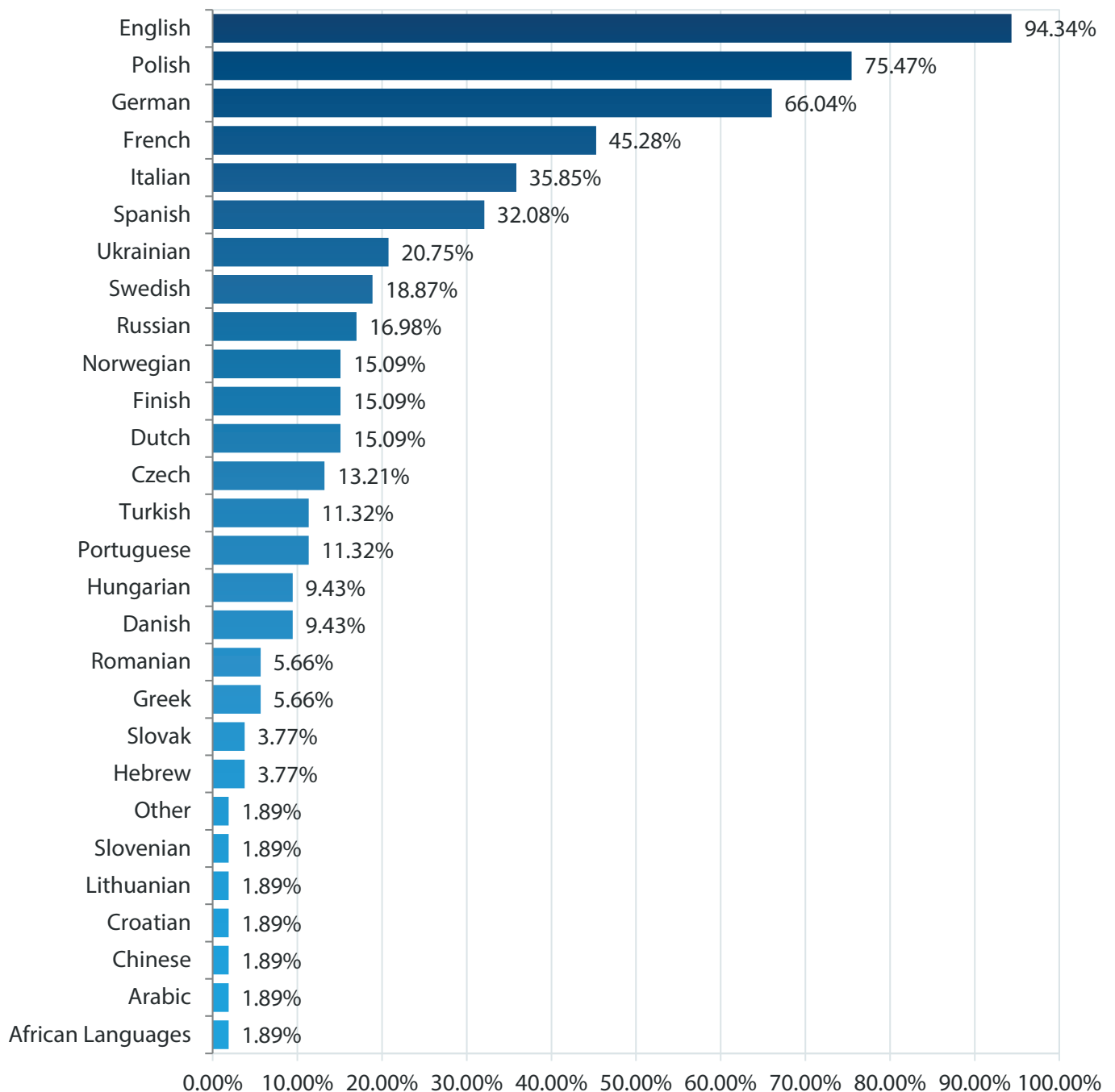


Processes overseen from Poznań:

• Other

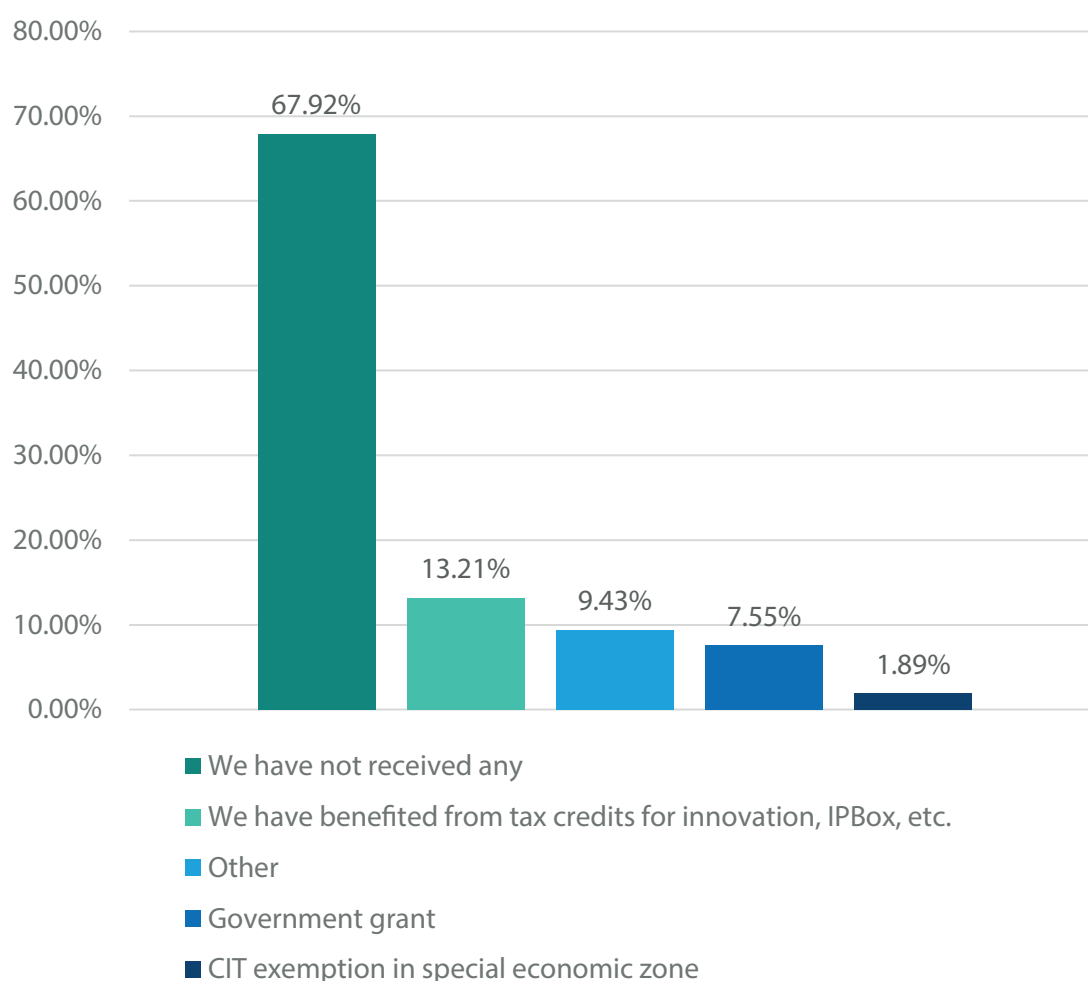


Foreign languages supported by processes in Poznań:

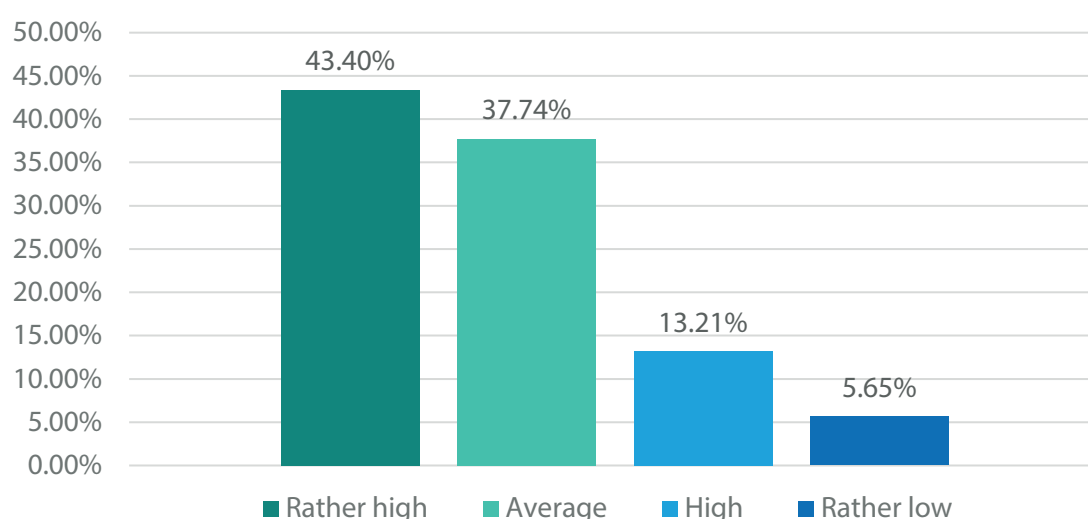


“The centres of modern shared services in Poznań support business processes in more than 30 languages. 94.34% of the companies surveyed responded that processes are handled in English, followed by Polish at 75.47%, and the podium is rounded off by German at 66.04%. There is also a year-on-year increase in the number of processes handled in French 45.28%, Italian 35.85% and Spanish 32.08%, which shows that more and more companies with capital from these countries are locating their businesses in Poznań.”

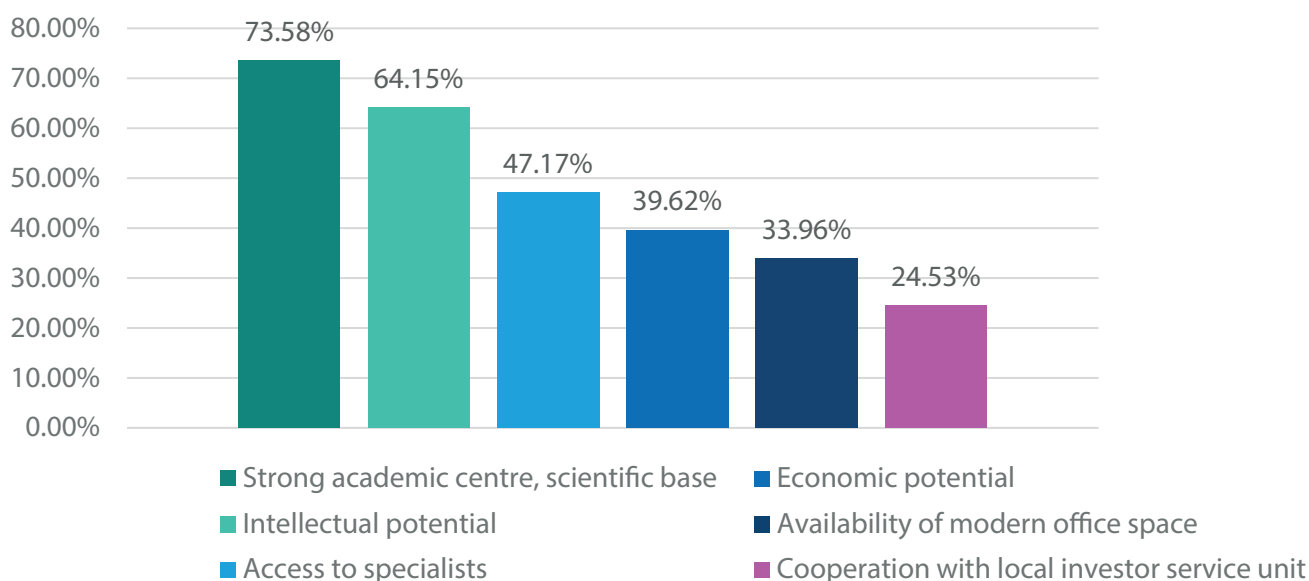
Has your company received financial support, e.g. a grant or tax relief?



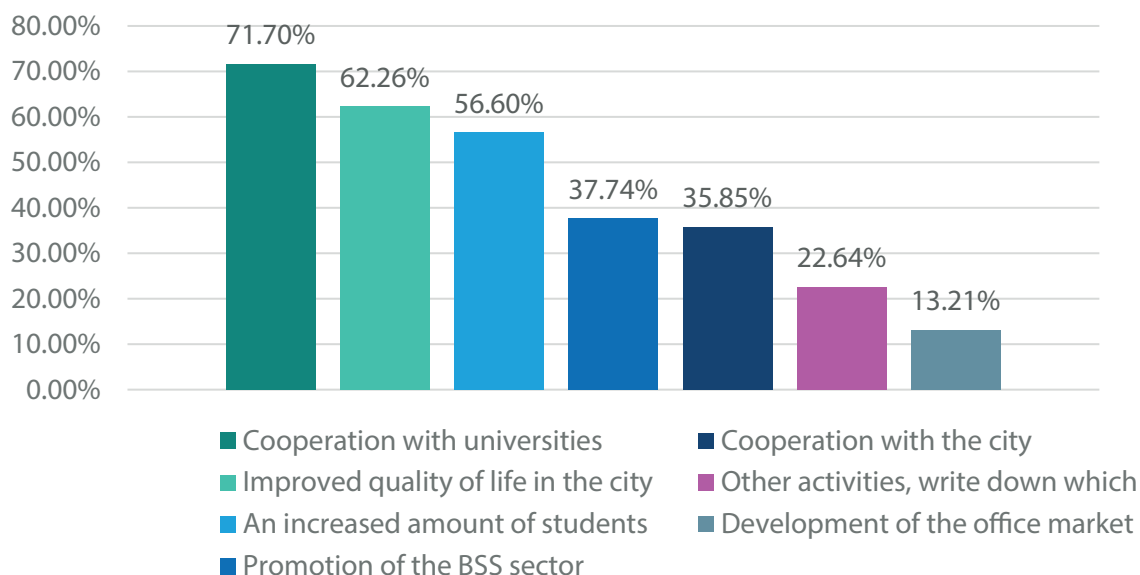
How do you rate the potential of Poznań for the development of SSC/BPO/GBS/CoE/R&D:



What factors determine your choice of Poznań as a business location?



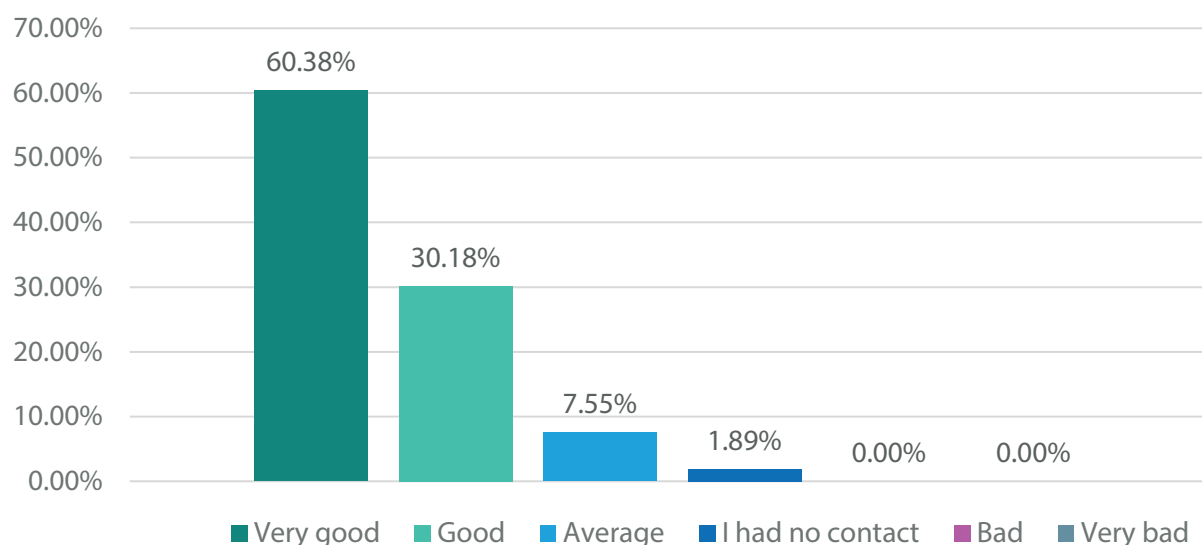
What is the most important to support the development of the BSS sector in Poznań?



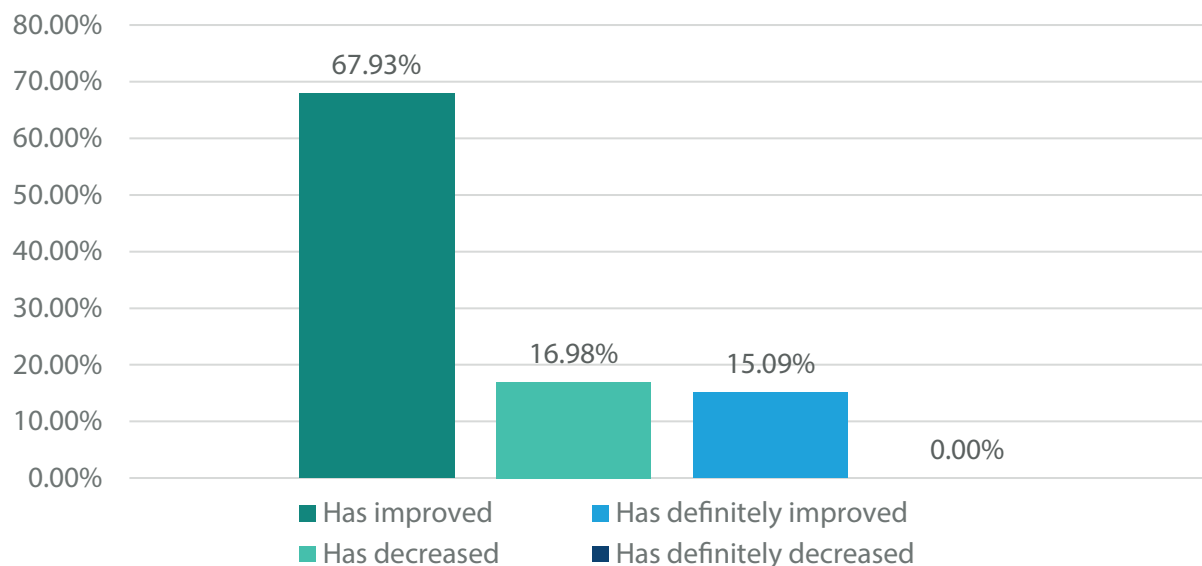
Would you recommend Poznań to other investors?

Yes
100%

How do you rate the cooperation with the representatives of the City of Poznań?



How would you rate the quality of life in Poznań over the last few years?



„From a business perspective, the quality of life in Poznań itself, which is improving significantly year on year, is not without significance. 83.01% of the companies surveyed responded that the quality of life in Poznań has improved or has definitely improved in recent years. Such results may strongly encourage local candidates to further develop in Poznań and candidates from outside the city to relocate. With such expertise, the Poznań market is also becoming attractive for new investors to locate their next business.”

Poznań has many features that caught our attention. Three of them that particularly encouraged us to invest here are: firstly, the location. Secondly, in Poznań we find well-educated specialists and finally, talented people who speak many languages that enable us to conduct global business. Cooperation with universities is our key activity, we believe in the potential of young people. We want to give opportunities to people at the beginning of their career. Graduates of Poznań universities are well educated and speak many languages. We chose Poznań because we see great economic, intellectual and administrative potential in it. In many rankings, Poznań appears at the forefront of Polish cities, we like its development very much.



Goektuerk Simsekol
Head of MKS'
Competence Center

Potential of the Poznań labour market



Potential of the Poznań labour market

Poznań is the fifth most populous city in Poland. Intensified activities of the City authorities aimed at improving the quality of life of residents and creating good conditions for business development mean that the capital of Wielkopolska has been in the sights of Polish and foreign companies from the business services sector for years. In addition, Poznań is popular with candidates from this industry - as evidenced by the generally low unemployment rate, which in March 2023 amounted to 1.1%.

A source of talents from all over the world

Poznań effectively attracts talents not only from other parts of Poland and neighbouring countries, such as Ukraine or Germany, but even from such distant corners of the world as India, Mexico or the USA. As a result, the city gains a team of qualified specialists who speak various foreign languages, necessary in the sector of modern business services. However, the migrant staff is not the only advantage of Poznań in the context of the availability of qualified specialists.

Strong educational base

Poznań is a **city with a rich history, cultural heritage and a significant role in the development of science. It is one of the largest scientific centres in Poland**, and each year universities attract thousands of students from Poland and abroad. **89.76%** of the respondents in our study (detailed results in the further part of the report) **indicated that Poznań has a rich education offer**, and 45.57% confirmed that it was the education offer that prompted them to live in the capital of Wielkopolska. There are both public and private universities in the City, offering various fields of study and opportunities for scientific development. Every year, **24 universities** provide the labour market with thousands of graduates of economics, IT and foreign language philologies, which are the most popular among employers and potential investors present in the business services sector market in Poznań.

Students/graduates of majors important for the modern services sector:

- **philological studies – 8,400 students/1,500 graduates**
- **engineering studies – 6,900 students/1,770 graduates**
- **IT studies – 6,350 students/1,350 graduates**
- **Business and administration – 22,000 students/5,700 graduates**

Source: Poznań City Hall

A good place to work and live!

Educational opportunities are not the only advantage for native and immigrant residents. The rich offer of the labour market in the sector of modern business services means that more and more people choose Poznań as a city to live in. Both graduates of linguistics, economics, and IT, as well as people with experience in this field, cannot complain about the multitude and richness of offers on the labour market. 87.40% of our survey respondents indicated that Poznań is a good place to work and develop professionally. 81.10% of the respondents confirmed that the labour market in Poznań is attractive, and 85.83% of the respondents would recommend Poznań as a place to work. But that's not all - Cost of living in Poznań is lower than Warsaw, Kraków or Wrocław. Both from the perspective of an employee and an investor, the constantly developing market of modern office space is a magnet that attracts people to the City. Every year, modern office complexes are built in various parts of the city. Thanks to the diverse and attractive offer of the local real estate market, the City can offer solutions that meet the new needs of both investors and candidates. The

capital of Wielkopolska is attractive to residents who value it for its high quality of life and safety. 76.38% of our survey respondents answered that Poznań is a safe city, and 70.87% of respondents would recommend Poznań as a place to live. All these factors make the City attractive to both investors and candidates. The portfolio of projects currently supported by the Poznań City Hall shows that interest in the capital of Wielkopolska is still growing. In addition, entrepreneurs already present in the City declare their willingness to further develop their activities, which allows us to look at the further development of the modern services sector in the City with optimism.

Talent pool - candidates with foreign languages in Poznań - examples

Chinese	405
Danish	140
Dutch	406
English	70628
Finnish	74
French	4292
German	17151
Italian	1795
Norwegian	203
Spanish	5455
Swedish	393
Arabic	288
Bulgarian	60
Croatian	136
Czech	286
Estonian	7
Greek	77
Hebrew	41
Hungarian	56
Japanese	325
Latvian	15
Lithuanian	36
Polish	177030
Portuguese	558
Romanian	79
Russian	10449
Serbian	100
Slovak	79
Slovenian	21
Turkish	608
Ukrainian	1525



Anna Mastalerz

Division Manager ML & Business Services,
Cpl Poland



Poznań is a very family friendly city with great infrastructure and, on the other hand, quick developing city with many universities, opportunities, and young talents. Based on that our employees chose this city for a living, and we decided to open our office too. Poznań is also a twin-city of our Ukrainian headquarters – Kharkiv.



Michael Smolin
Head of Poznań Office
Sigma Software

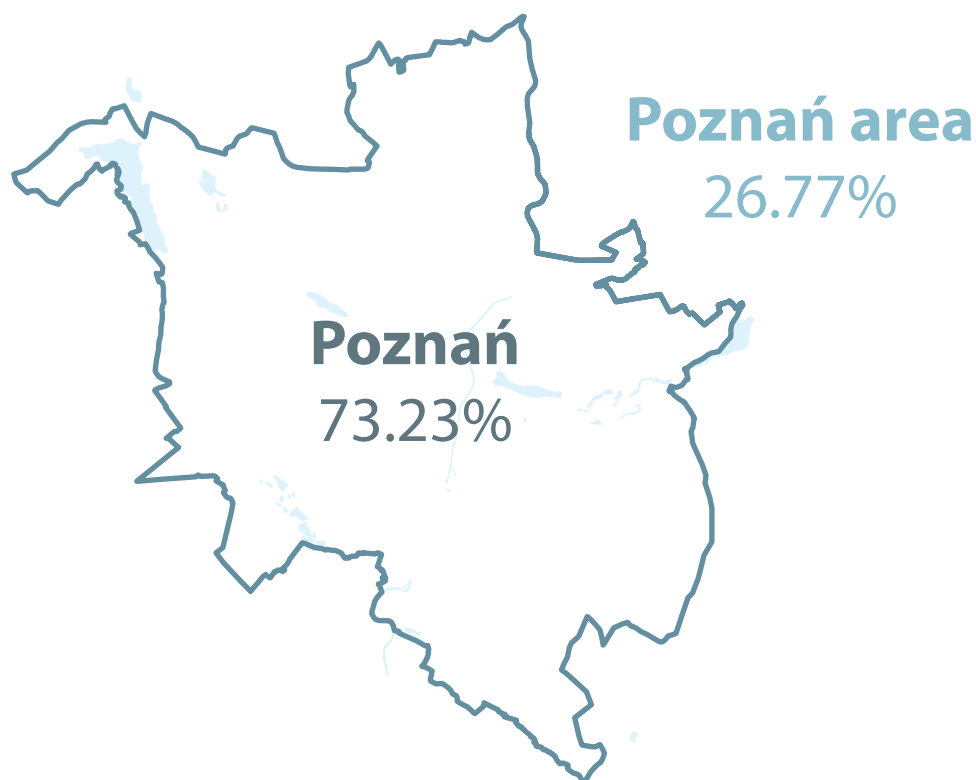


Survey of Investor Relations Department and Cpl Poland

Cpl Poland and Investor Relations Department prepared a survey about standard of living and labour market in Poznań among the employees in the business services sector.



Name your place of residence:



What is your current mode of work?



Hybrid 95.28%

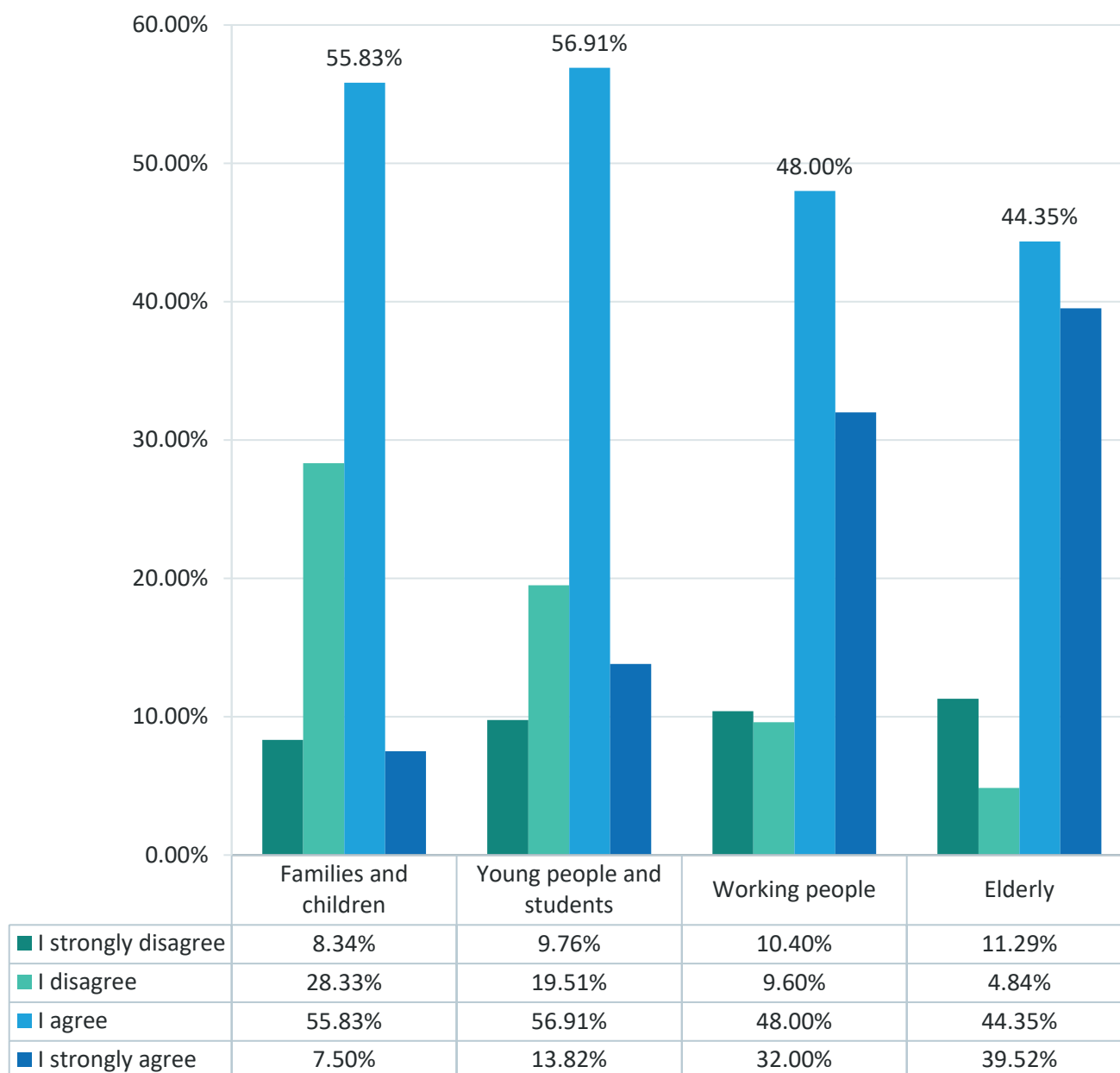


Remote 3.15%



Office 1.57%

Poznań is a good place to live for:



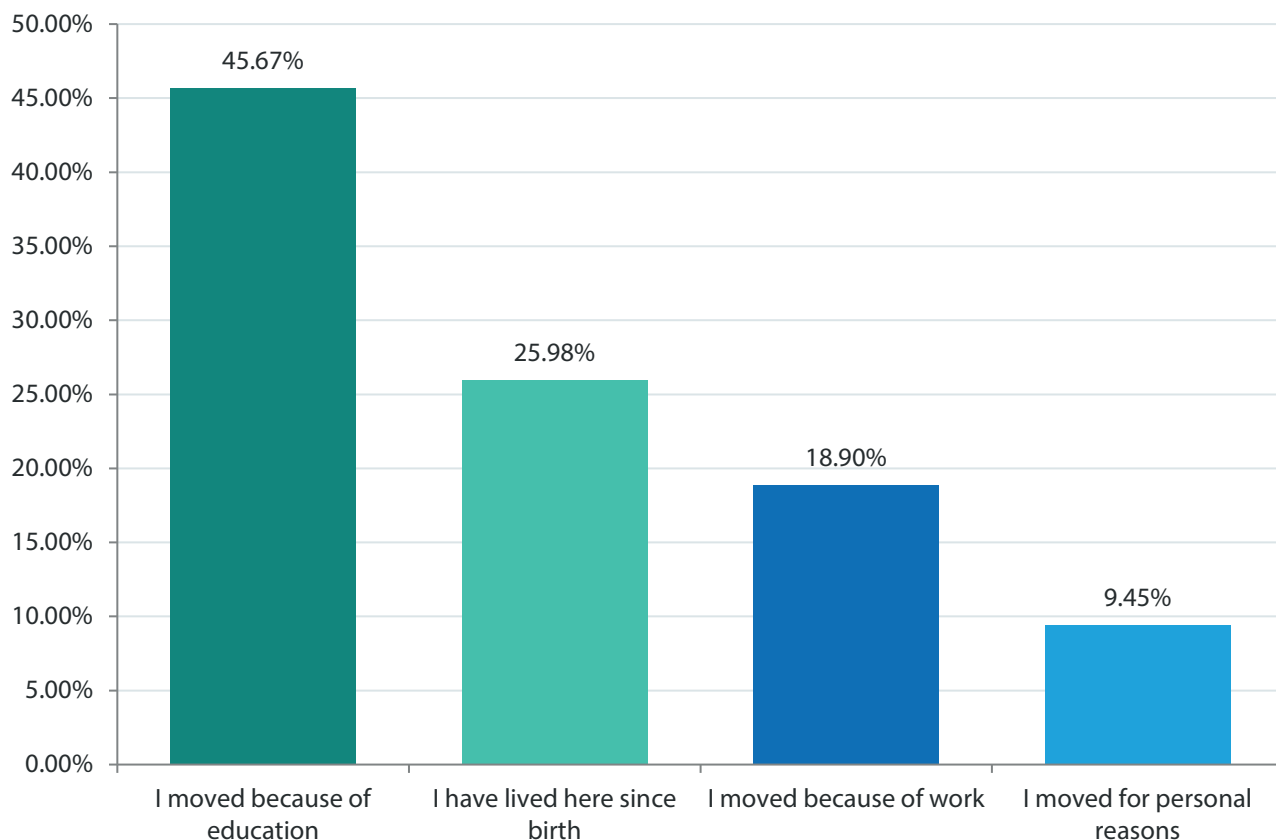
Are you employed based on:

An employment contract
98.43%

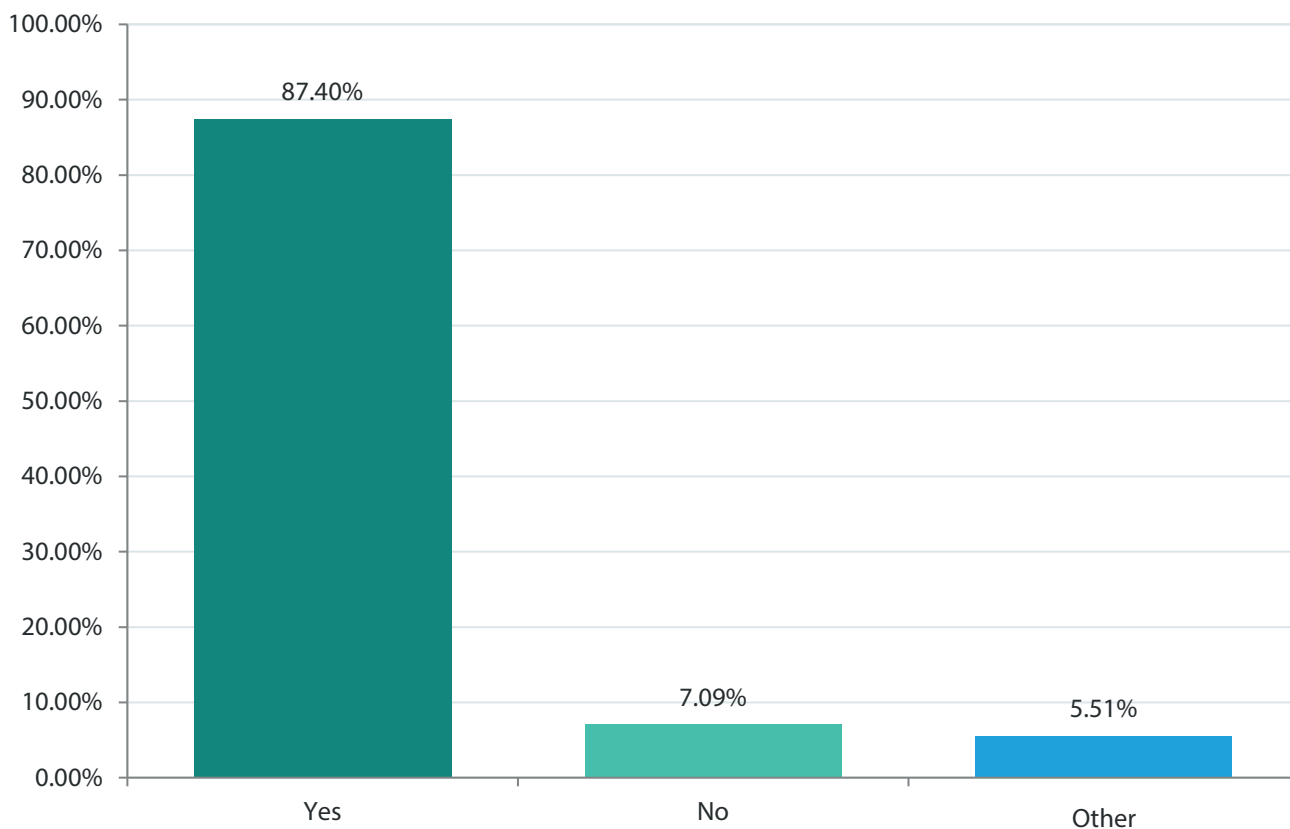
Other type of contract
1.57%

B2B
0%

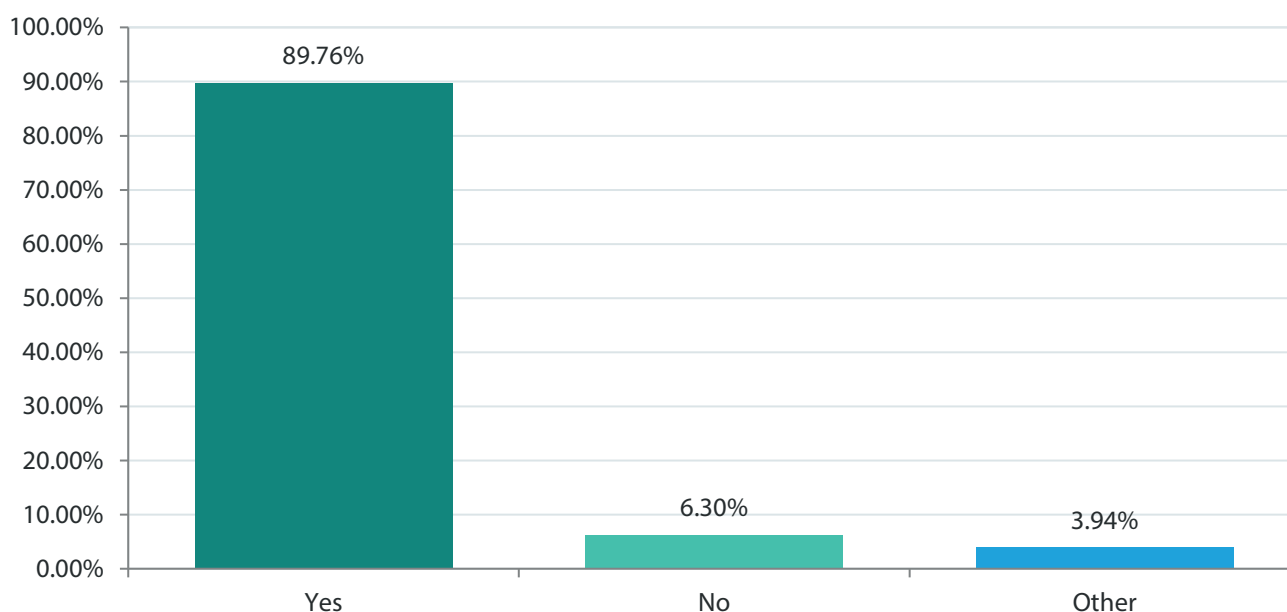
What made you decide to live in Poznań:



Is Poznań a good place to work and develop professionally?

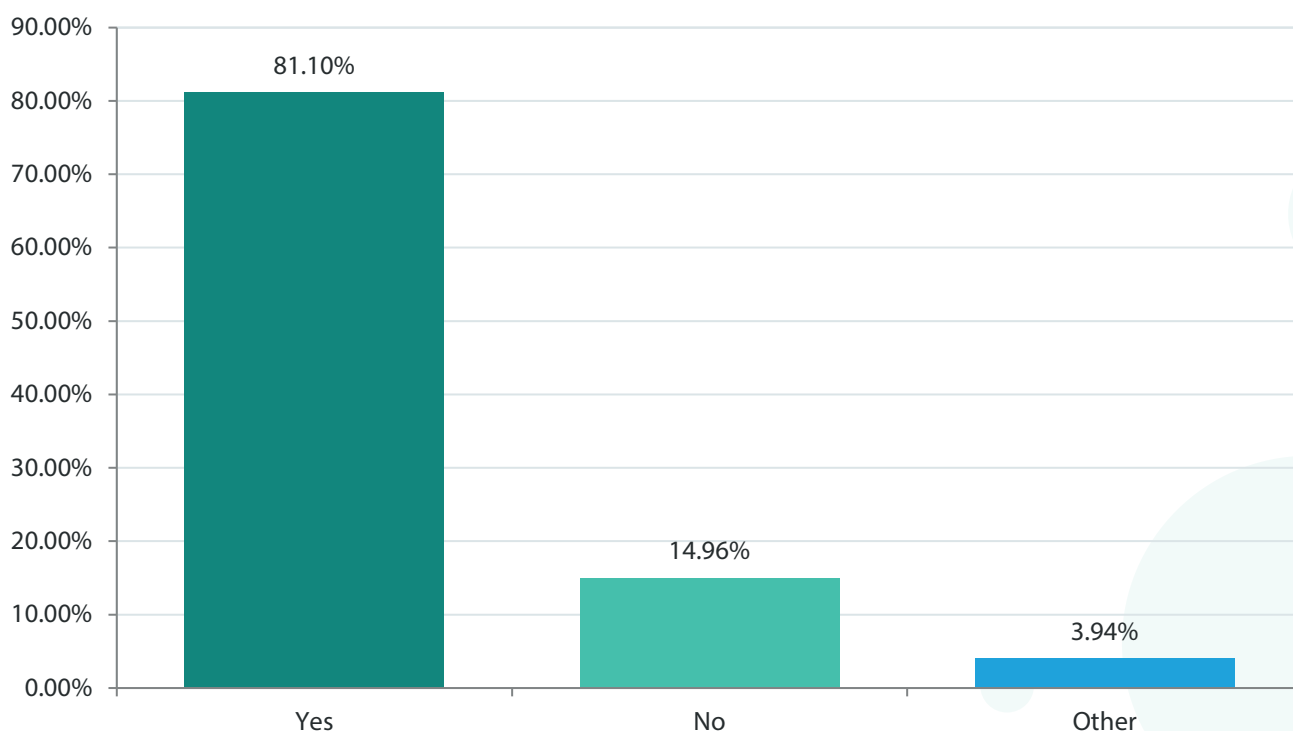


Do you think that Poznań has a good range of educational opportunities?

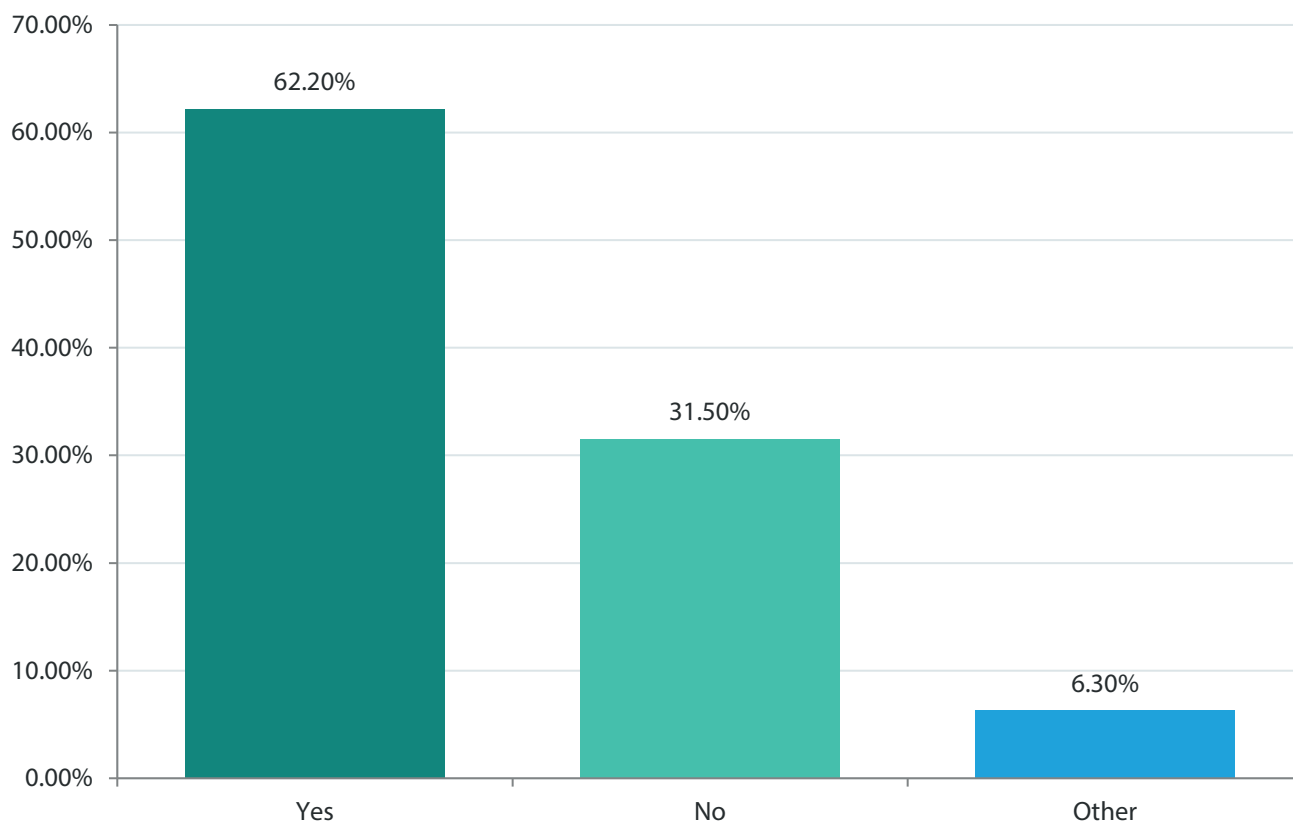


"Poznań is a city with a rich history and cultural heritage and plays a significant role in the development of science. It is one of the largest scientific centers in Poland. Every year, universities attract thousands of students from Poland and abroad to the city, so it is not surprising that nearly 90% of the respondents answered that Poznań has a wide range of educational opportunities."

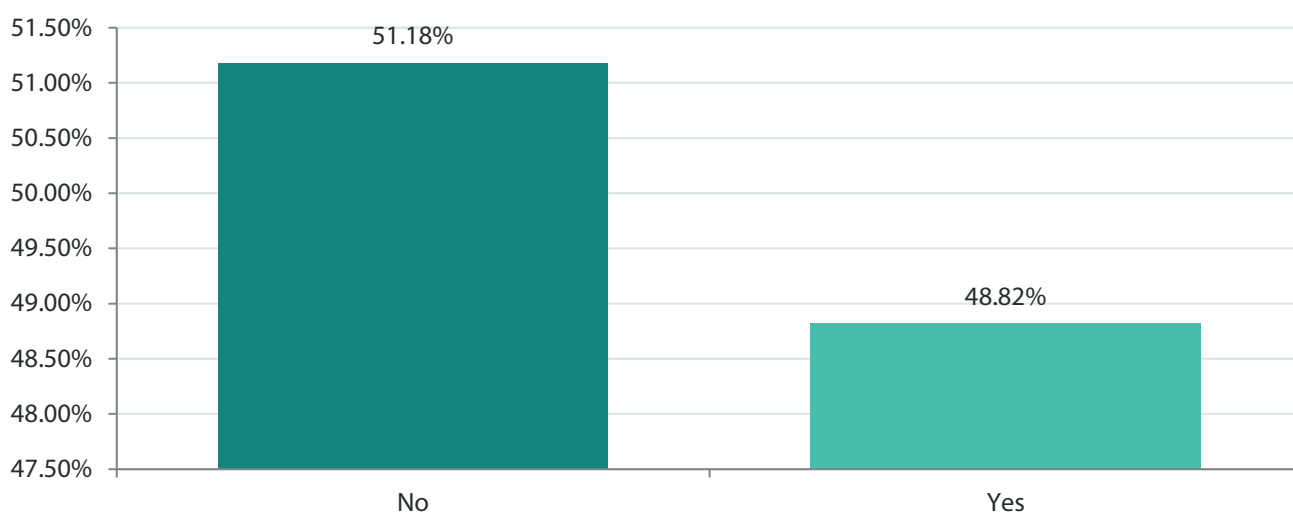
Is the job market in Poznań attractive?



Do you believe that Poznań has a rich commercial/cultural/sports/entertainment offer?

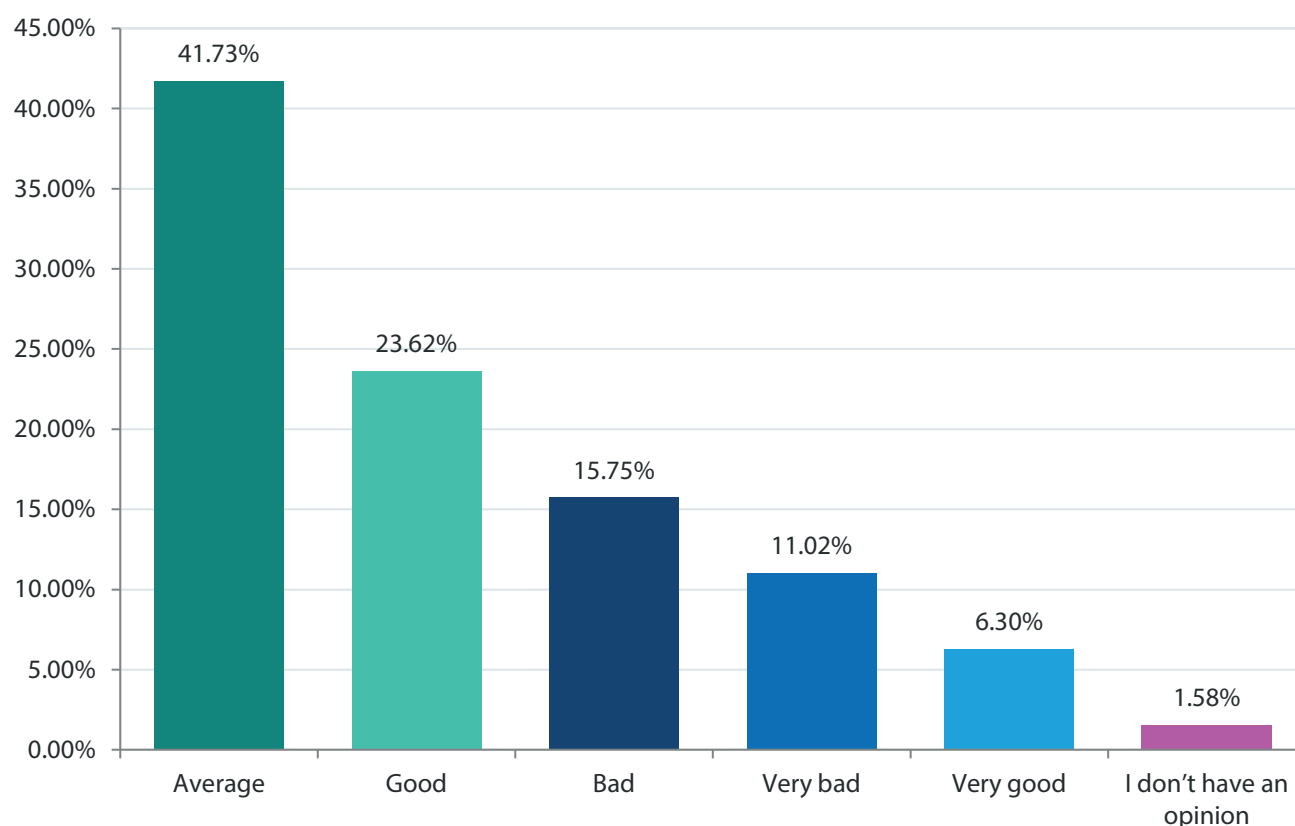


Do you find public transportation in and around Poznań has attractive offer?

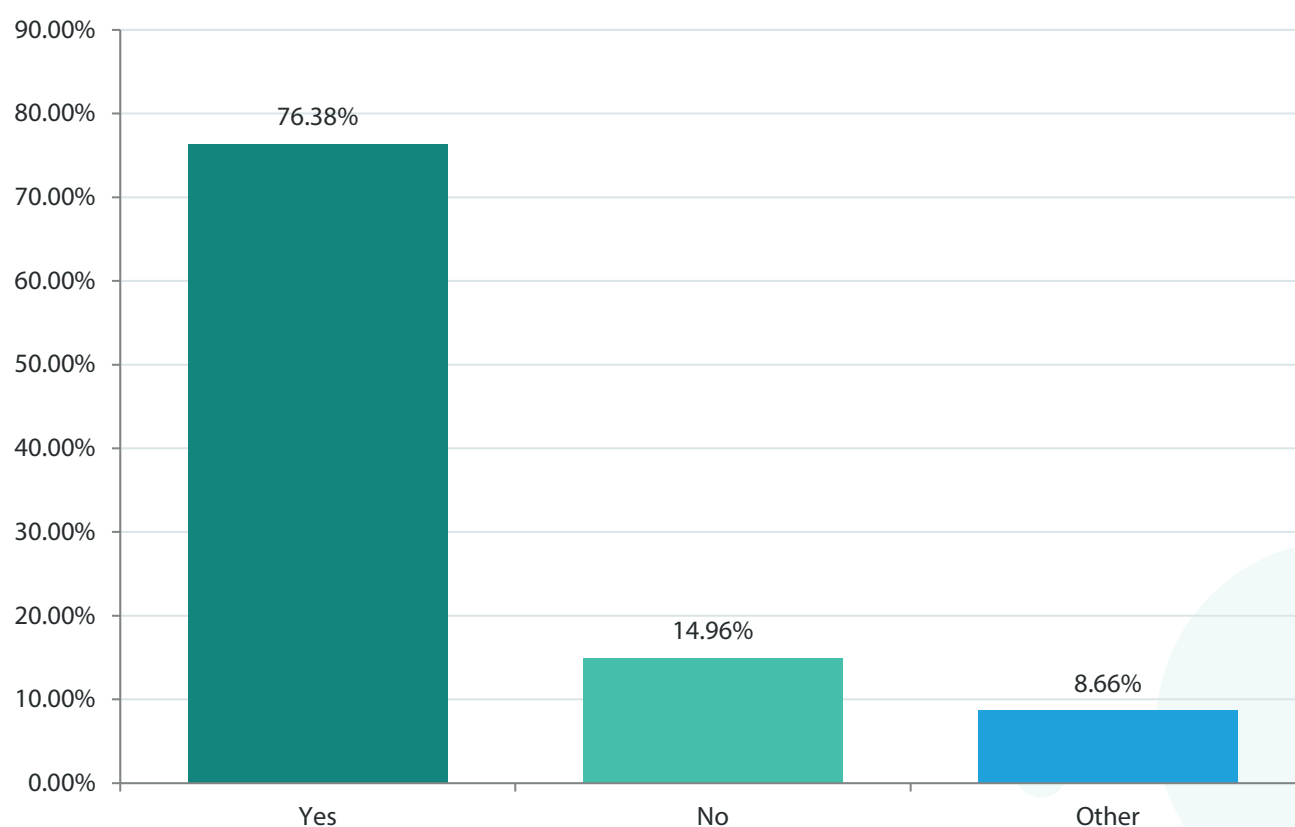


"Poznań has one of the most extensive public transport networks in Poland. Nevertheless, a number of renovation and modernization works are currently being carried out in the city, which inevitably interfere with the functioning of public transport in some parts of the city."

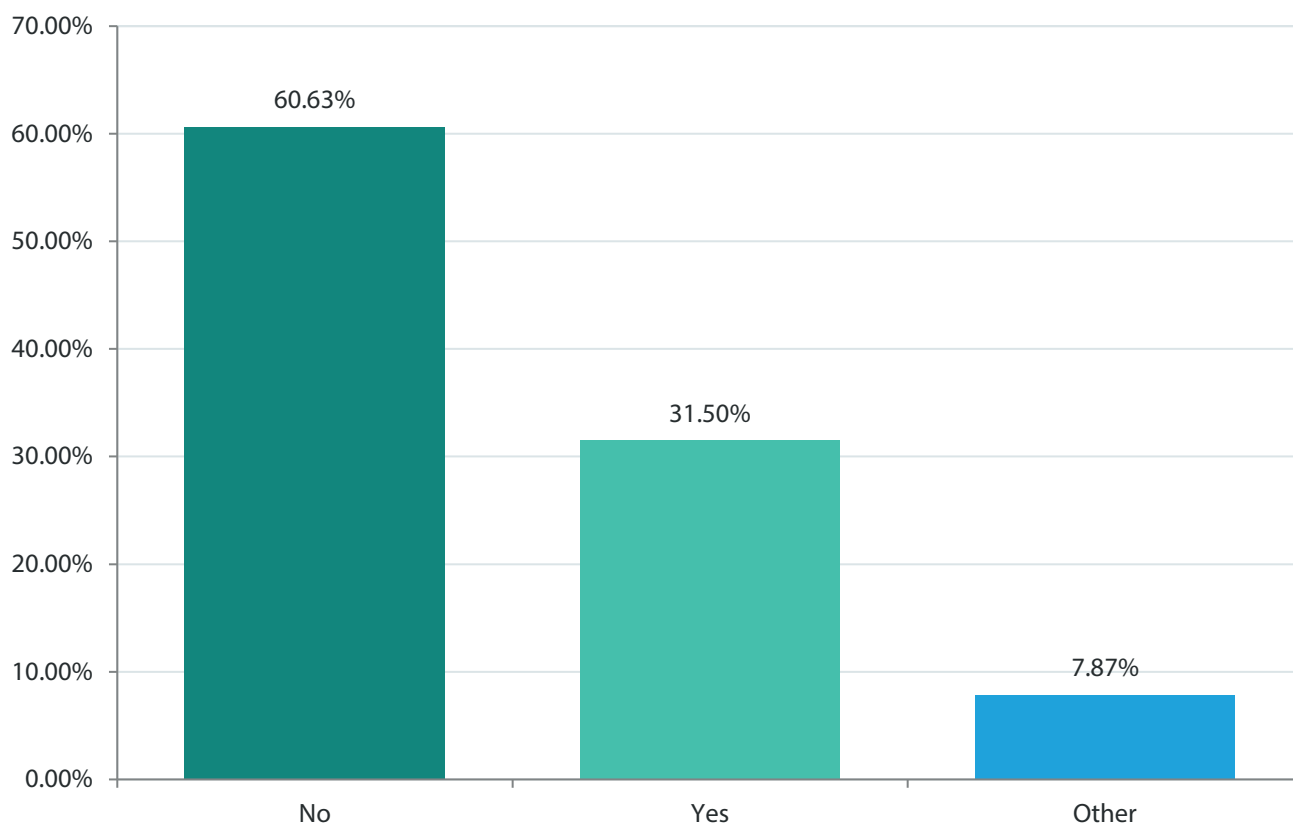
How would you rate the public space and aesthetics of the City of Poznań?



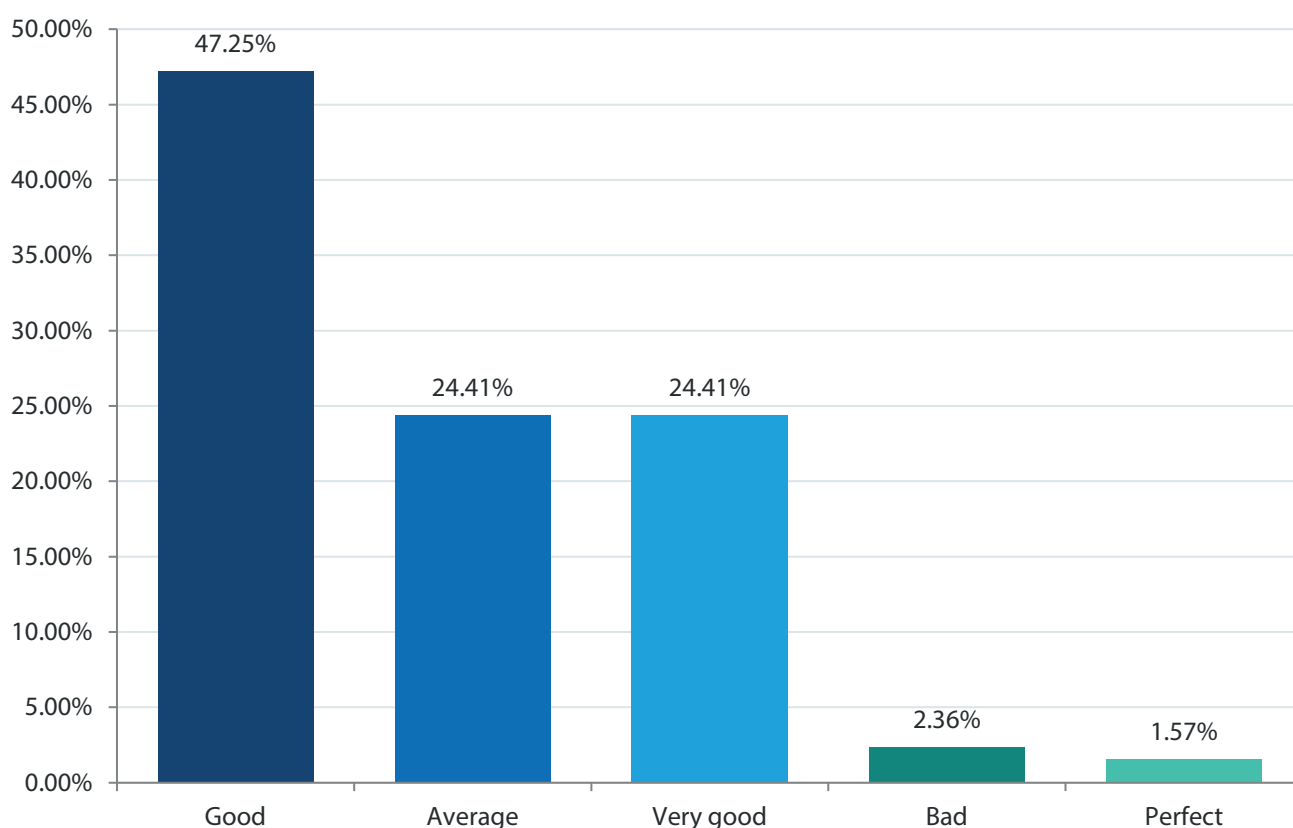
Is Poznań safe?



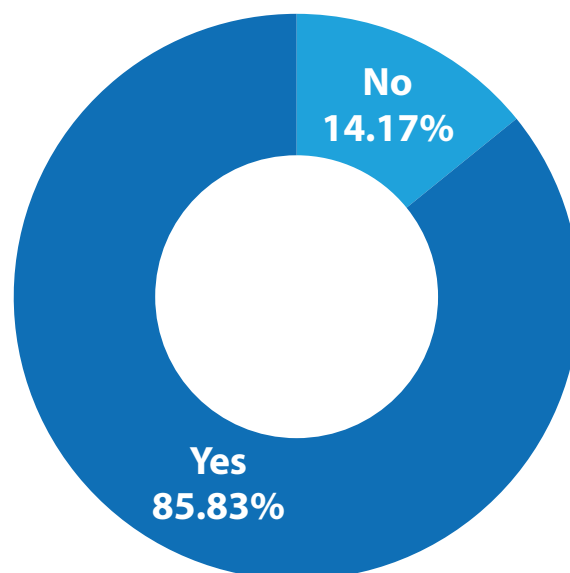
Do you find the quality of air in Poznań good?



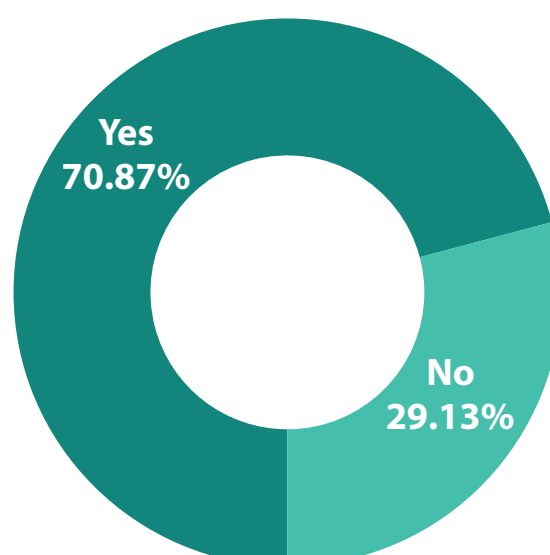
How would you rate the quality of life in Poznań?



Would you recommend Poznań to others as a place to work?



Would you recommend Poznań to others as a place to live?



"The results of the study in the context of education, the labour market, quality of life and the sense of security show that Poznań is a very attractive city both for living and professional development. It is not surprising that nearly 71% of the respondents would recommend Poznań to others as a place to live."

"I would definitely recommend Poznań as a place to work for the following reasons:

- the city and the neighbouring towns are very well connected (train, suburban bus, expressway network and motorway)
- a large number of green areas as well as attractions and monuments
- safety
- modern office buildings and numerous shopping centres
- rich educational offer

Those wanting to work will definitely find a job in Poznań (in fact, it is the employer who will find them)."

Przemysław

Fishing Financial Manager
SHIMANO POLSKA SP. Z O.O

"There are currently more than a dozen SSC companies in Poznań, such as MAN, Carlsberg, GSK or Bridgestone, that belong to the world's largest corporations.

Such a developed market of financial services means that anyone looking for an adventure in the world of finance or accounting has the opportunity to find the perfect job for themselves, and the reputation of the concerns guarantees a very good and interesting entry in the CV. Having new shared service centres springing up in Poznań also means that the market is developing at a good pace, which increases the competitiveness between companies."

Tymon

Senior Controlling Specialist
MAN SSC

Salary rates for selected positions in the business services sector

The ranges of salaries presented in this Report have been compiled based on data collected during recruitment projects conducted by Cpl Poland.

The presented pay rates for selected positions are the average gross monthly salary offered for a given position. The salary does not include any additional cash or non-cash benefits offered to employees by their employers.



All salaries are the average gross monthly basic salary offered for a given employment contract.

Customer service	MIN PLN	AVG PLN	MAX PLN
Junior Customer Service	5000	5500	6000
Customer Service Specialist	6000	6500	7000
Senior Customer Service	7000	7500	8000
Customer Service Team Leader	9000	10500	12000
Customer Service Manager	14000	16000	18000

Procurement	MIN PLN	AVG PLN	MAX PLN
Junior Procurement Specialist	5000	5500	6000
Procurement Specialist	6000	6500	7000
Senior Procurement Specialist	7000	7500	8000
Procurement Team Leader	10000	11500	13000
Procurement Manager	15000	17000	19000

HR/Payroll/Learning&Development	MIN PLN	AVG PLN	MAX PLN
Junior Talent Acquisition	4800	5400	6000
Talent Acquisition	6500	7000	7500
Senior Talent Acquisition	7500	8250	9000
Talent Acquisition Team Leader	9000	10500	12000
Talent Acquisition Manager	14000	16000	18000
Junior HR&Payroll Specialist	5000	5500	6000
HR&Payroll Specialist	6000	6500	7000
Senior HR&Payroll Specialist	7500	8250	9000
HR&Payroll Team Leader	10000	11500	13000
HR&Payroll Manager	14000	16000	18000
Junior Learning&Development Specialist	5000	5500	6000
Learning&Development Specialist	6000	6500	7000
Senior Learning&Development Specialist	7500	8250	9000
Learning&Development Team Leader	10000	11500	13000
Learning&Development Manager	14000	16000	18000

Reporting	MIN PLN	AVG PLN	MAX PLN
Junior Reporting Specialist	5500	6250	7000
Reporting Specialist	8000	8500	9000
Senior Reporting Specialist	8500	10250	12000
Reporting Team Leader	11500	12750	14000
Reporting Manager	14500	16250	18000

Experience: Junior: 0-0,5 year; Specialist: 1-2 years; Senior: 3-4 years

All salaries are the average gross monthly basic salary offered for a given employment contract.

Accounting	MIN PLN	AVG PLN	MAX PLN
Junior AP/AR Accountant	5500	6000	6500
AP/AR Accountant	7000	7500	8000
Senior AR/AP Accountant	8000	9000	10000
AP/AR Team Leader	9000	10500	12000
AP/AR Manager	12000	14000	16000
Junior GL Accountant	6000	6500	7000
GL Accountant	8000	8500	9000
Senior GL Accountant	8500	10250	12000
GL Team Leader	11000	12500	14000
GL Manager	14000	16000	18000

Tax	MIN PLN	AVG PLN	MAX PLN
Junior Tax Specislist	6000	6500	7000
Tax Specislist	7500	8250	9000
Senior Tax Specislist	8000	9500	11000
Tax Team Leader	11000	12500	14000
Tax Manager	14000	16000	18000

IT Technical Support	MIN PLN	AVG PLN	MAX PLN
Junior Technical Support	5000	6000	7000
Technical Support Specialist	7000	8500	10000
Senior Technical Support	10000	11500	13000
Technical Support Supervisor	13000	14000	15000
Technical Support Team Leader	14000	15000	16000
Technical Support Manager	16000	18000	20000

Administration	MIN PLN	AVG PLN	MAX PLN
Network Engineer	14000	17000	20000
Applications Administrator	11000	15000	19000

Database	MIN PLN	AVG PLN	MAX PLN
Database Administrator	14000	16000	18000
Database Developer	15000	17500	20000

IT Security	MIN PLN	AVG PLN	MAX PLN
SOC Analyst	11000	15000	19000
Security Engineer	15000	19000	23000
Security Manager	23000	26500	30000

All salaries are the average gross monthly basic salary offered for a given employment contract.

Business Intelligence	MIN PLN	AVG PLN	MAX PLN
Junior Business Intelligence Developer	8500	9750	11000
Business Intelligence Developer	11000	13500	16000
Senior Business Intelligence Developer	16000	18500	21000
Big Data Engineer	20000	25000	30000
Data Scientist	15000	19000	23000
RPA Developer	11000	14500	18000

Cloud Computing	MIN PLN	AVG PLN	MAX PLN
Junior DevOps Engineer	12000	14000	16000
DevOps Engineer	16000	19000	22000
Senior DevOps Engineer	22000	24000	26000
Cloud Engineer	16000	21000	26000
Cloud Architect	24000	28000	32000

Software Development	MIN PLN	AVG PLN	MAX PLN
IT Director	35000	37500	40000
Software Development Manager	25000	30000	35000
Team Lead Software Developer	20000	25000	30000
Junior Software Developer C/C++	7500	9750	12000
Software Developer C/C++	12000	15000	18000
Senior Software Developer C/C++	18000	20500	23000
Junior Software Developer Java	8500	10250	12000
Software Developer Java	12000	16000	20000
Senior Software Developer Java	20000	21500	23000
Junior .NET Developer	7000	9000	11000
.NET Developer	11000	13500	16000
Senior .NET Developer	16000	19000	22000
Junior Python Developer	8000	10500	13000
Python Developer	13000	16000	19000
Senior Python Developer	19000	21500	24000
Junior PHP Developer	6500	8250	10000
PHP Developer	10000	12500	15000
Senior PHP Developer	15000	17500	20000
Junior Ruby on Rails Developer	7000	9500	12000
Ruby on Rails Developer	12000	15000	18000
Senior Ruby on Rails Developer	18000	20000	22000
Junior Angular Developer	8000	10500	13000

All salaries are the average gross monthly basic salary offered for a given employment contract.

Software Development	MIN PLN	AVG PLN	MAX PLN
Angular Developer	13000	16500	20000
Senior Angular Developer	20000	22000	24000
Junior React Developer	8000	10000	12000
React Developer	12000	15500	19000
Senior React Developer	19000	21000	23000
Mobile Developer	13000	16500	20000
Junior Manual Tester	6000	7000	8000
Manual Tester	8000	9500	11000
Senior Manual Tester	11000	13500	16000
Junior Automation Test Engineer	11000	12000	13000
Automation Test Engineer	13000	14500	16000
Senior Automation Test Engineer	16000	18000	20000
Test Manager	19000	21500	24000
Software Architect	20000	25000	30000
System Analyst	12500	15250	18000
Business Analyst	10000	13500	17000
IT Project Manager	12000	15000	18000
IT Product Owner	16000	18500	21000
Scrum Master	14000	18000	22000
UX/UI Designer	11000	14500	18000

Experience: Junior: 0-0,5 year; Specialist: 1-2 years; Senior: 3-4 years

Language	Additional salary - AVG PLN
German	1000-2000
French	800-1500
Italian	500-1000
Spanish	500-1000
Portuguese	700-1000
Croatian	500-1000
Greek	500-1000
Czech	700-1000
Slovak	700-1000
Norwegian	800-1200
Swedish	800-1200
Danish	900-1500
Finnish	900-1500

When deciding to open a multifunctional competence centre for the ROCKWOOL Group, we wanted to choose a location that would be culturally close to us and that would guarantee us access to qualified employees. Poznań turned out to be a place that has the energy of a modern European city and offers high quality education. One of the key factors was the availability of skilled workers. There are as many as 26 higher education institutions in Poznań, including 4 universities. This is a huge potential and the main source of acquiring talented staff.



Ewelina Płocieniczak
Head of ROCKWOOL GBS



ROCKWOOL®

Poznań Office Market Potential



Poznań Office Market Potential

Poznań, with its diversified economy, is the largest urban and academic centre in the north-west of the country. The headquarters of companies from sectors such as automotive, logistics and modern business services are located there. The city attracts investors from various industries and local universities adapt their education programmes to labour-market needs, especially from the business services sector. Poznań stands out due to its favourable geographical location and well-developed road infrastructure. Another advantage is the city's proximity to Berlin, Hamburg and Dresden as well as numerous international air connections. The availability of modern office space is one of the most important factors determining the location of an investment in each city. Demand for modern office space is generated primarily by companies in the modern business services sector. Over the past few years, Poznań has become an important centre for shared service centres and is continuously strengthening its position in this sector.

Modern office supply

Poznań modern office stock in Q1 2023 totaled to 623,000 m². About 40% of the stock is concentrated in the city centre with its borders defined by the streets of Solna, Małe Garbary, Matyi, Królowej Jadwigi, Roosevelta, and the Warta River to the east. The other two office hubs are located in the vicinity of Malta Lake and the western part of the city on Bułgarska Street, where the Business Garden Poznań complex, the largest office park in the city (86,700 m²), is located. In 2022 there were no office developments delivered to the market which implies a new supply gap. **Recent new completions include two office projects – Nowy Rynek D (35,800 m²) and Wilczak 45 (1,700 m²) delivered to the market in 2021.**

Currently, almost 70,000 m² of office space is in the construction stage and is scheduled for completion in the years 2023 - 2025. **Two new projects will be delivered in the coming months with Nowy Rynek E (27,300 m²) being the largest one.** A further 65,000 m² is in the planning phase and is scheduled for completion in 2024-2026. The most vibrant development projects include the Stara Rzeźnia mix-use complex located centrally prepared by Vastint. The developer will restore old buildings of former meat processing plants and transform an area of approximately 5.5 ha in the city centre into a multifunctional complex with office, retail, and residential, as well as artistic and exhibition functions. The multi-stage investment BPI Real Estate Poland and Revive in the centre of Poznań in former military barracks that combines residential, retail, and office space and revitalizes historic buildings, will significantly boost the city's development.

The flex office sector is in the early stage of development in Poznań and covers approx. 7,000 m² — with major active operators – Regus and Business Link.

Demand for modern office space

The total transaction volume in 2022 reached 46,500 m² which shows a drop of 37% compared to the result recorded in 2021 - 73,500 m². The office demand and tenants' activity in Poznań indicate a cyclical character. Typically, after the development phase resulting in the completion of new office projects, developers reduce activity to allow the newly delivered office space to be absorbed. Over the past two years, the market has seen increased interest from tenants and investors in Poznań office buildings, so developers have started several office developments. Delivery of new office premises will influence the existing tenants; pool in the city and encourage new investors to lease office space in Poznań.

The largest share in total demand in Q1 2023 is attributable to new transactions – 68%. Renewals of existing contracts amounted to 25% of quarterly take-up volume and expansions as much as 7%. Pre-let contracts accounted for 2,000 m² of rented space (20% of quarterly demand) showing stable interest of tenants in pipeline projects.



The vacancy rate has been on a downward trend over the past few years starting from a 13% at the end of 2020. At the end of Q1 2023, the vacancy rate in Poznań had decreased to 11.3% which equals 70,500 m² of available space. Approximately 23% of available space is located within nine buildings of Business Garden Poznań office park. Two projects are offering vacant units of over 5,000 m² in total – Giant Office and Skalar Office Center.

Rental rates for office space remained at a stable level for several quarters. Rents in modern A-class projects stood at EUR 14.50–16.25 m²/month in the central zone and EUR 13.25–15.25 m²/month in non-central zones at the end of Q1 2023. Rental rates in Poznań are at a comparable level to Katowice, Kraków, Wrocław and Tricity.

Office market trends

The office demand is returning to the market, the tenants are seeking buildings with ecological certifications such as LEED and BREEAM, which ensure high energy efficiency and minimal environmental impact. Growing environmental awareness is driving an increasing demand for sustainable offices equipped with the latest technological solutions, such as smart building management systems, fast internet access, and remote work capabilities. Those are measured by WiredScore and SmartScore certificates focusing on a building's infrastructure and connectedness and reflecting the property's overall state of the technology. The introduction of hybrid work models has led to a growing interest in hybrid offices. Companies are looking for spaces that enable a flexible transition between remote work and office work, providing the necessary tools and infrastructure. The importance of employee well-being in the workplace is growing. Companies are increasingly looking for offices that offer recreational areas, fitness facilities, relaxation zones, as well as access to natural light and greenery. Among the key challenges in 2023, there are growing restrictions in the collection of funding for new office developments, increasing construction costs and the necessity to seek savings due to energy price rises - both for tenants and office building owners.

Market Summary Q1 2023

Total modern supply (m²)



Vacancy rate (%)



Flex space supply



Prime asking rents (EUR/m²/month)



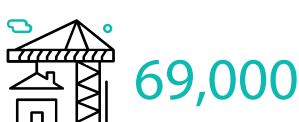
New supply 2023 (m²)



Office demand 2022 – Q1 2023 (m²)



Office space under construction (m²)



Olga Drela
Associate Director, Colliers



Poznań on the map of the modern services sector



Poznań on the map of the modern services sector

Poznań. One of the most important regional cities in Poland. The capital of Wielkopolska and at the same time an urban center for many decades associated with St. Martin's croissant on the one hand, and with various business branches, including automotive, IT and the BPO/SSC sector, on the other.

If we look at the development of the modern business services sector in Poland over the last quarter of a century, we will see that **Poznań has been and still is a location that effectively tempts and invites projects of international organizations, which are implemented here in the form of operating centers of BPO (business process outsourcing), SSC/GBS (shared service centers), R&D (research and development) or IT profiles.**

Poznań is a multiple winner of the Outsourcing Stars award in the City category, which is awarded to the fastest-growing locations in relation to BSS (Business Support Services) investments.

The development of the modern business services sector in Poznań is possible thanks to several factors that cooperate and interact in a perfect way in the capital of Wielkopolska. On the one hand, it is an **educational system**. At local universities, there are courses of study, from which the modern business services sector draws massively. Educational programs are tailored to the needs of the labour market and local employers, and what is more, they maintain the interest of students who, despite the demographic decline, attend classes and obtain education every year.

Another important element for the development of the BSS sector in Poznań is **the base of office real estate**. The office urban tissue in Poznań is developing steadily, which means that office buildings gain new tenants on an ongoing basis. The city does not have one office zone, but at least several such areas, which is also important from the perspective of new investors (who also care about operating at a certain distance from their competitors). Office projects are among the most modern in Europe.

Looking at the BSS sector in the city, one cannot overlook the support and care for investments that comes directly from the Poznań City Hall. The investor service team is a group of high-level specialists, communicating in foreign languages and perfectly familiar with the needs of both smaller and larger organizations that create IT, financial and accounting, analytical centers or those whose domain is multilingual customer service, and basically its next stage of development, i.e. CX (Customer Experience).

Poznań is one of four cities from the so-called Tier 2, i.e. a basket of regional cities, which is characterized by high business maturity, availability of employees with various competences, a balanced level of business costs, and available to international and local businesses. Own airport, train station in the city center and location directly on the A2 motorway are also factors that are important for many companies.

Finally, one tip - business is one thing, and knowledge sharing is another. Poznań is a city of many excellent business conferences, including Impact or Pozitive Technologies, whose regular guests are experts from the world of modern business services.



Wiktor Doktor
CEO
Pro Progressio



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