

A background image of space. On the left, the curved horizon of Earth is visible, showing a blue atmosphere and white clouds. The rest of the image is a dark field filled with numerous stars of various colors and sizes. A bright light source, likely the sun, is partially visible at the top left, creating a lens flare effect.

HOW FAR CAN WE GO?

ARE WE GETTING TOO EXPENSIVE?

Salaries in Kraków

presented by:

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Investors coming into town are buying off our employees

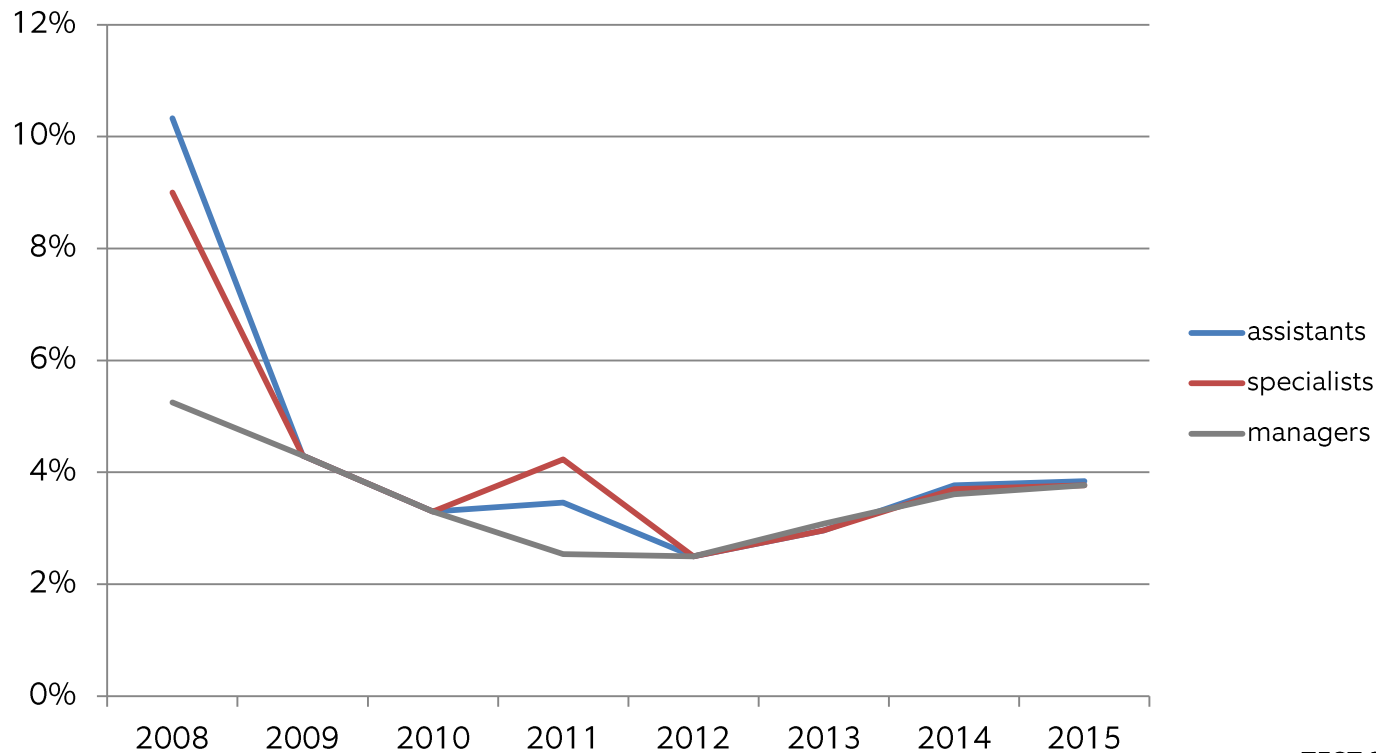
WE NEED TO KEEP RAISING SALARIES TO KEEP OUR STAFF!

Made in Kraków | New entrants: 5 year Trend, 1995-2014

ASPIRE 



Average raise rate in SSC/BPO



Source:
TEST Salary Survey 2008-2015

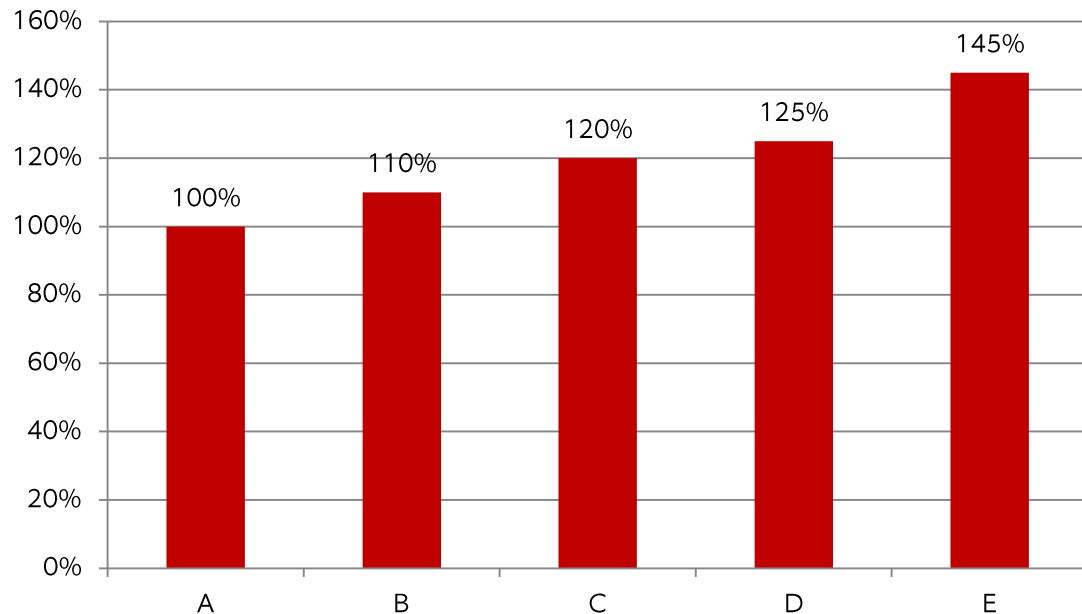
Some of our positions are very pricey

IT USED TO BE MUCH CHEAPER!

Language	Poland	Kraków	Language	Poland	Kraków
English B1-C2	78,73%	84,28%	Czech B1-C2	0,33%	0,41%
German B1-C2	12,05%	10,61%	Danish B1-C2	0,04%	0,06%
Italian B1-C2	1,27%	1,92%	Portuguese B1-C2	0,21%	0,36%
Spanish B1-C2	2,02%	2,68%	Slovak B1-C2	0,15%	0,31%
French B1-C2	2,81%	4,34%	Croatian B1-C2	0,12%	0,21%
Norwegian B1-C2	0,07%	0,13%	Serbian B1-C2	0,10%	0,16%
Dutch B1-C2	0,14%	0,18%	Hungarian B1-C2	0,05%	0,10%
Russian B1-C2	6,69%	5,30%	Greek B1-C2	0,08%	0,11%
Swedish B1-C2	0,11%	0,19%	Romanian B1-C2	0,03%	0,09%
Bulgarian B1-C2	0,08%	0,07%	Finish B1-C2	0,02%	0,04%

Source:
pracuj.pl candidate database, April 2014, 78 803 observations, candidates aged 25-40 with university degree

Language premium



A - English

B - English + Spanish, Portuguese, Russian, Italian

C - English + French

D - English + German, Arabic, Croatian, Czech, Estonian, Greek, Latvian, Romanian, Slovak, Slovenian, Swedish, Turkish, Hungarian

E - English + Danish, Flemish, Norwegian, Finish, Dutch

Source:
TEST Salary Survey 2015

Over 30% of Krakow business centres'
headcount is in IT → 13.000 FTEs

8-13% staff turnover in ITO

2,498 openings in Kraków – 655 of them in IT

2,200 IT graduates in Małopolska

Sources:

ASPIRE survey 2012, ABSL report 2014, Pracuj.pl 14 May 2015, GUS 2013

Polish & local economy are growing fast

SOON IT WILL BE NO CHEAPER HERE THAN IN OUR HQ!

Labour cost €/hour
(excluding agriculture & public administration)

	2004	2008	2012	2013	2014	2014 non- wage costs	change 2014/2013
EU-28	19	21,5	23,9	24,2	24,6	24,4%	1,4%
Germany	26,8	27,9	30,5	31	31,4	22,3%	1,5%
France	28,2	31,2	34,3	34,3	34,6	33,1%	0,7%
Poland	4,8	7,6	7,9	8,1	8,4	18,7%	3,8%
UK	21,5	20,9	21,7	20,9	22,3	16,5%	6,7%

THANK YOU

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