



ASPIRE

BEYOND THE *BUBBLE*

WORLD STAGE 

WE'RE NOT ALONE.

THREATS AND OPPORTUNITIES FOR
KRAKÓW AS A LOCATION

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Locationperspectives



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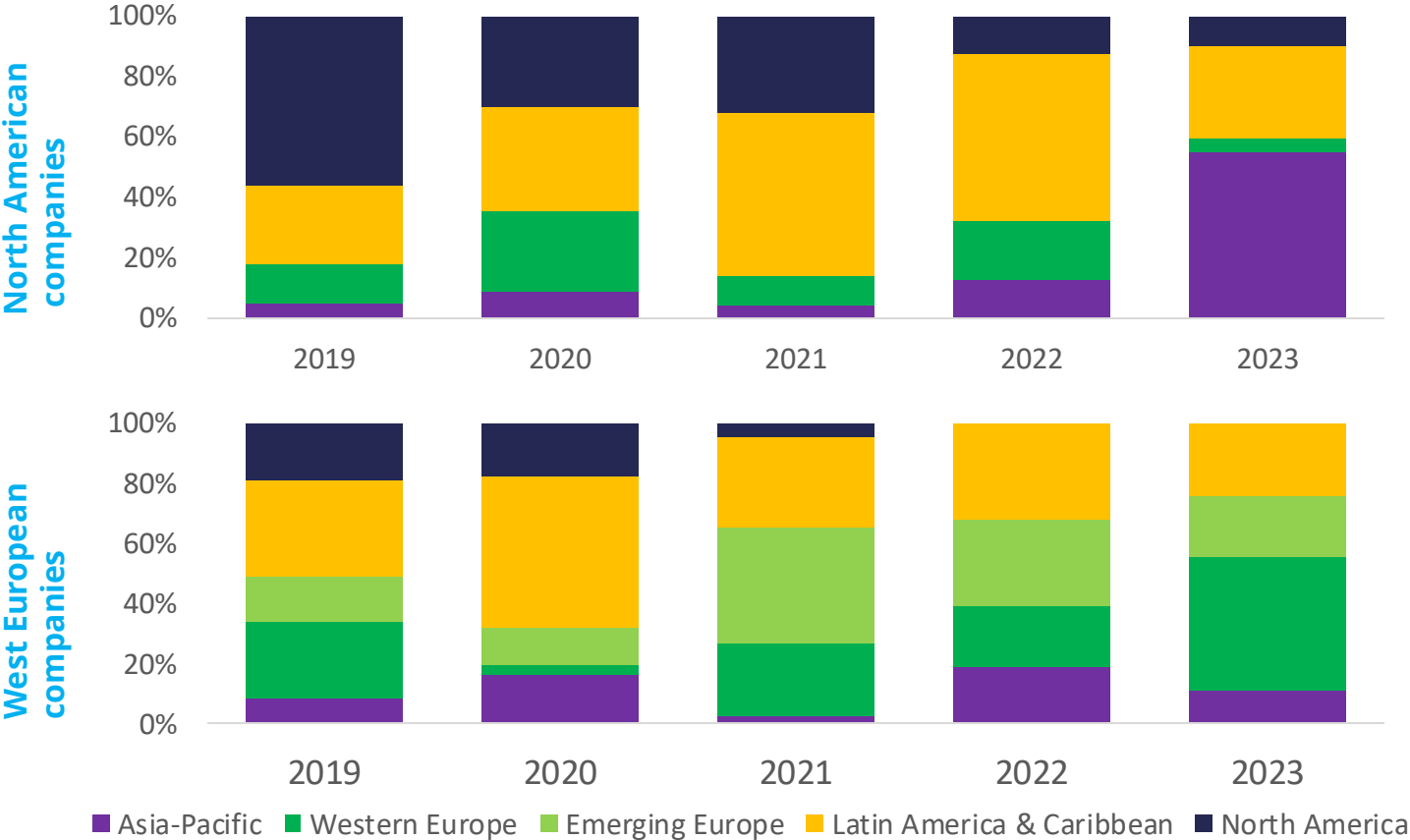


Dark cloud coming down?

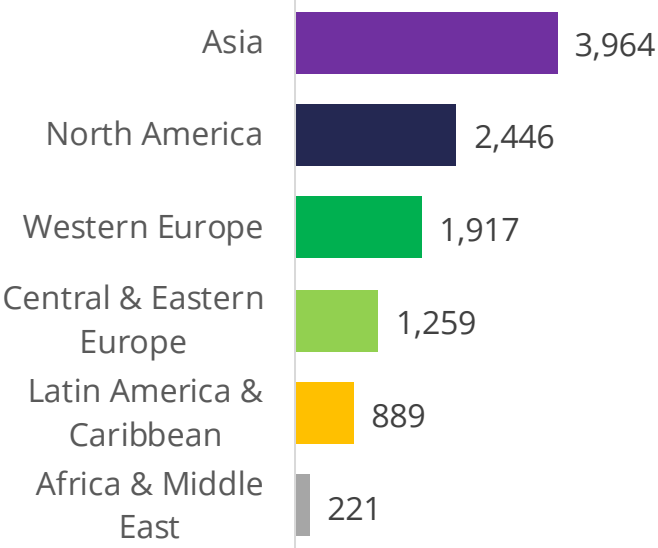
- Impact of global trends on Krakow's global competitiveness as industry hub:
 - **42.3%** Improving/weakening the position
 - **15.4%** No significant impact
- Outlook on Krakow's role:
 - **51.9%** Strong hub for tech/business services across delivery lines/Specializing in specific niche areas
 - **17.3%** Transitioning to different economic focus
 - **5.8%** Declining as a tech and business services hub
- Krakow's biggest challenges to overcome to remain competitive globally:
 - **76.9%** Rising costs
 - **55.8%** Competition from other emerging tech hubs
 - **42.3%** Talent shortage in specific skills

Notes: Based on ASPIRE Leaders' Survey (Sep 19, 2024).

Shoring trends



Delivery Centers



Notes: Based on job announcements for shared services, tech support and customer service drawing on fDi Markets, a service of The Financial Times Ltd. Used with permission and SSON Research & Analytics.

What type of city do you think Krakow is?

Switch to Eventree platform???

Please use the Eventree app to rate Krakow against the opposite 4 criteria

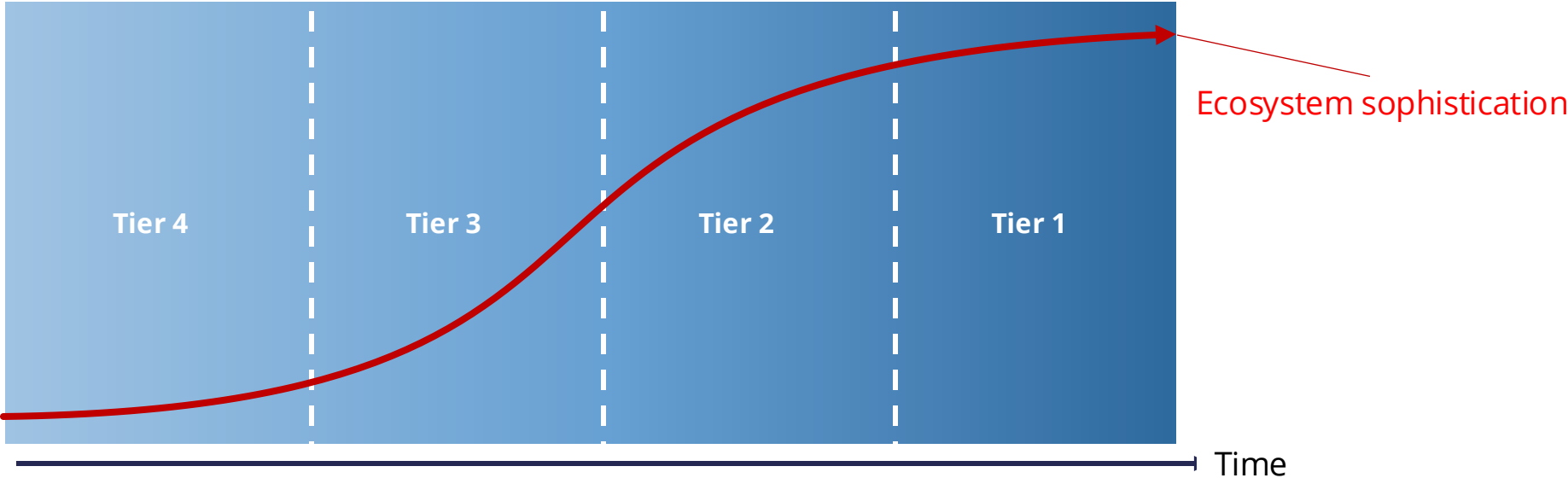
How would you characterise Krakow against 4 criteria?

Eventree app QR code, URL and login number

| | From | | | | | To |
|--|----------------------------|---|---|---|---|-------------------------------|
| Nature of the processes | | | | | | |
| | Predominantly script-based | 1 | 2 | 3 | 4 | Predominantly knowledge-based |
| Wages | | | | | | |
| | Low | 1 | 2 | 3 | 4 | High |
| War-for-talent | | | | | | |
| | Low | 1 | 2 | 3 | 4 | Fierce |
| Number of delivery centres in Krakow vs. that of cities with centres having a reach to my Krakow centre | | | | | | |
| | Low | 1 | 2 | 3 | 4 | High |

What you think Krakow is

Results of Slido interaction



Nature of the processes

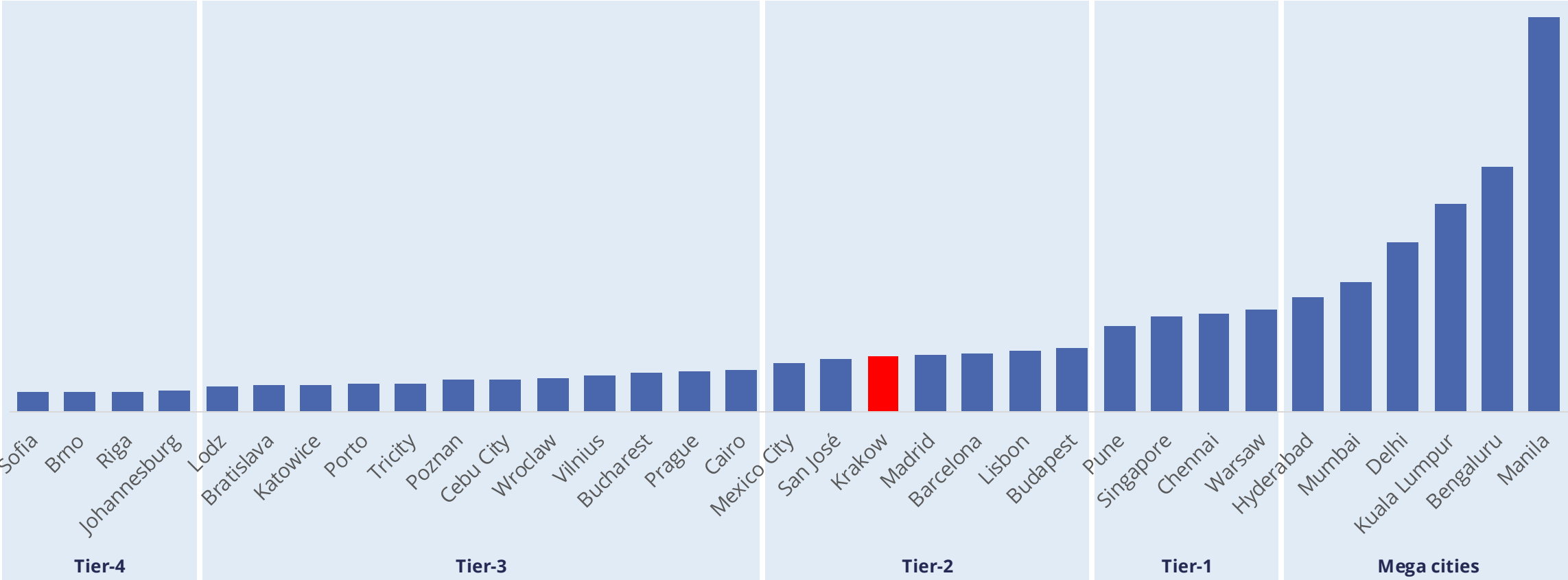
Wages

War-for-talent

Number of delivery centres

The big picture

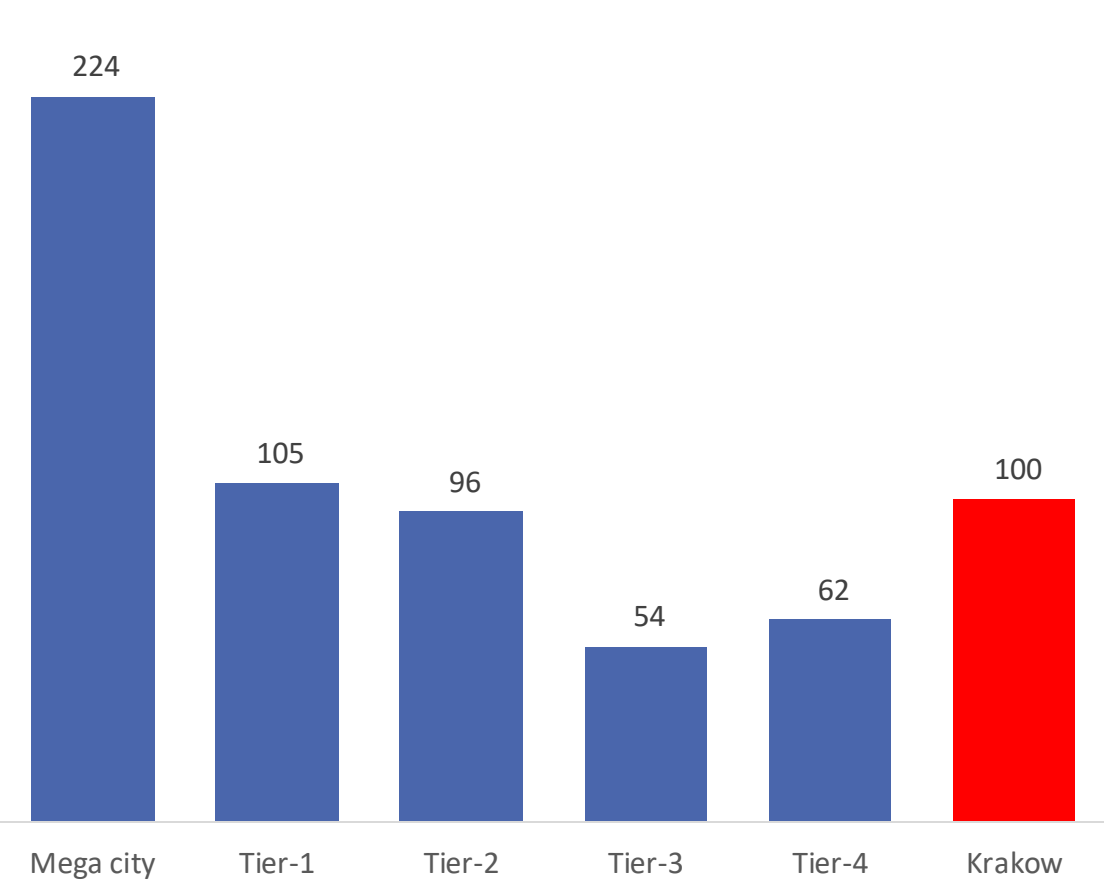
Categorising the Peer Group by Number of Delivery Centres



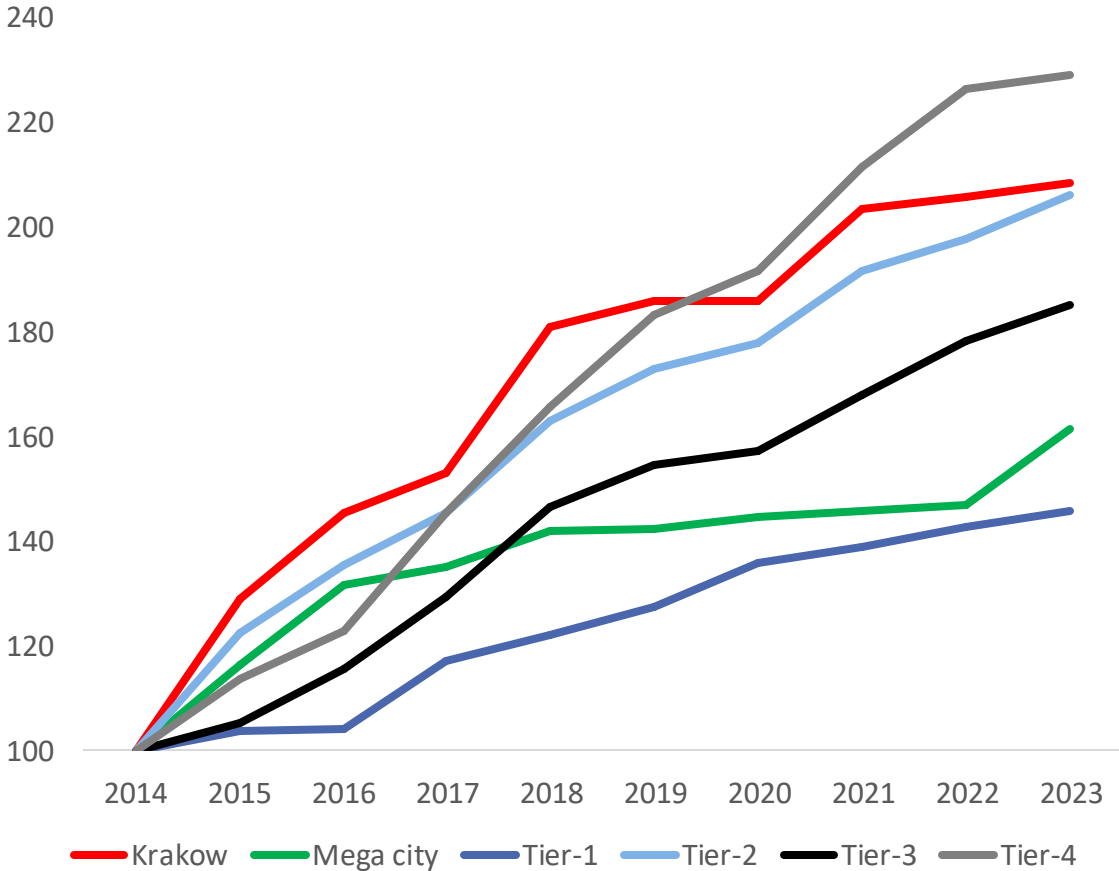
Notes: Segmentation based on a globally harmonized indicator for number of Delivery Centres, Sources: Locationperspectives, SSON Research & Analytics, 2024.

Krakow positioned

Job Creation per City Type (KRK = 100)



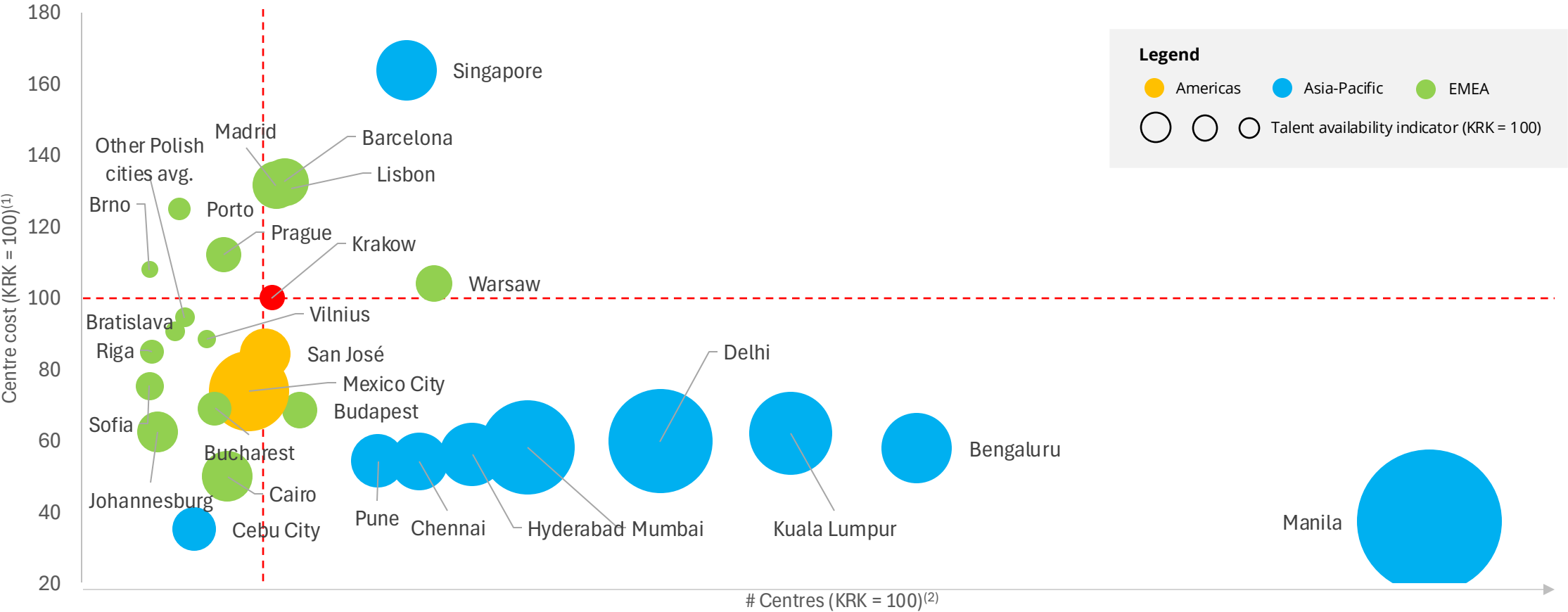
Accumulated job creation (2014 = 100)



Notes: Based on job announcements for shared services, tech support and customer service drawing on fDi Markets, a service of The Financial Times Ltd. Used with permission.

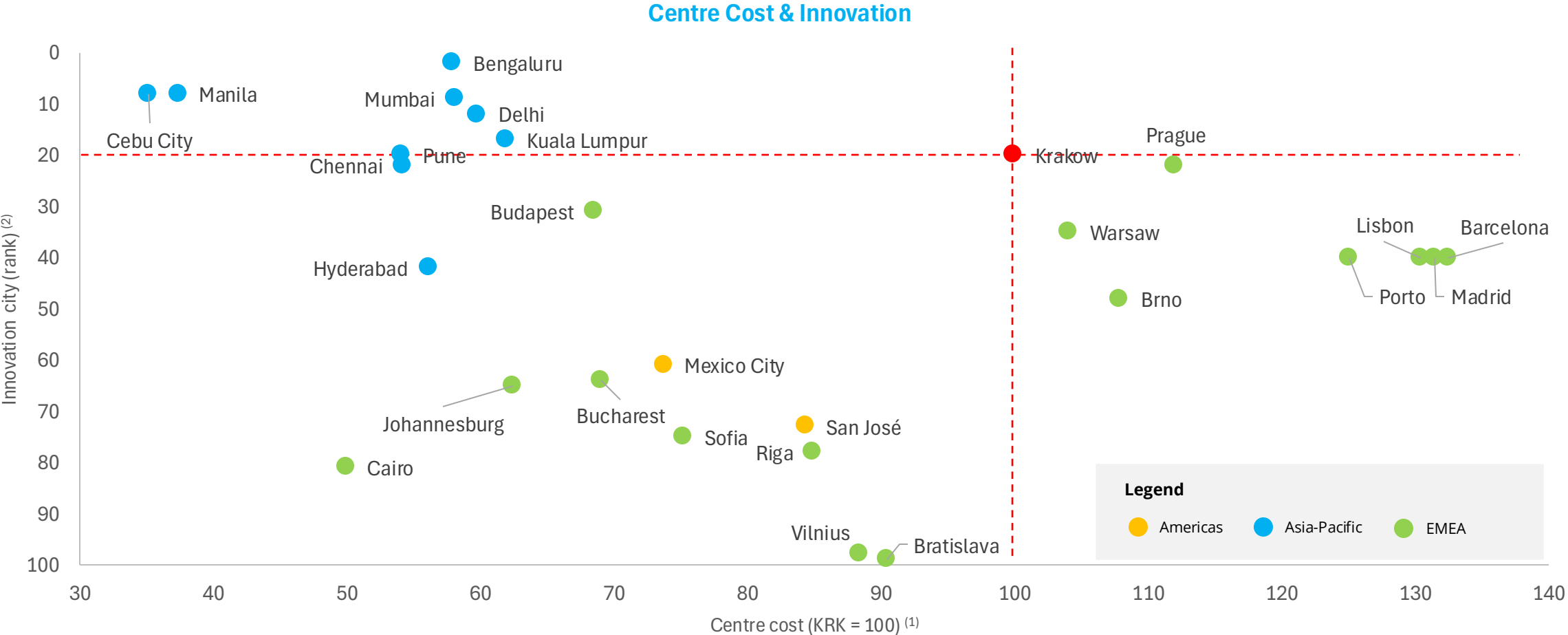
Krakow positioned

Number of Delivery Centres, Centre Cost and Talent Availability



Notes: (1) Based on average cost (salary + rent) for F&A, HR, Marketing, Procurement and Supply Chain centres. (2) Based on harmonized centre definition. Sources: Locationperspectives based on SSON Research & Analytics.

Krakow positioned



Sources: (1) Average cost (salary + rent) for F&A, HR, Marketing, Procurement and Supply Chain centres, based on SSON Research & Analytics. (2) Based on Tholons Super Innovation Cities, 2021.

Discussion



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THANK YOU
