



BPO/SSC/IT SECTOR

Lublin is a strong academic centre. Universities with their scientific and research background make for one of the greatest strengths of the city and provide opportunities for the development of specialized IT and business services based on knowledge and modern technologies (BPO/SSC). Availability of qualified staff, friendly business climate, competitive costs and increasingly improving transportation infrastructure are significant incentives for investors looking for a convenient location for their modern service centers.



HUMAN RESOURCES

More than 80,000 students yearly attend universities in Lublin. Taking into account the ratio of the number of students to the total population (ca. 350,000), Lublin is one of the leaders in Poland. The city is full of young, well-educated and ambitious people.

Among the students there are 2.3 thousand foreigners which places Lublin in the 5th place in Poland in terms of the number of foreign students in the city. Majority of them come from Ukraine, the USA, Taiwan, and Norway.

Among the fields of study related to the sector of modern business services, the greatest number of students choose Law and Administration (ca. 9,000), Economics (ca. 3,000) and Finance and Accounting (more than 2,000). Foreign language studies are also popular (over 3,000 students) where apart from traditional courses such rare languages as Dutch or Slavonic studies with Bulgarian, Ukrainian and Belorussian are also available. There is equally a strong center of Portuguese language and undergraduate Chinese language program has been launched recently.

In IT category high potential is formed by students of Information Technology (ca. 2,200) and related majors, such as IT Education, Mathematics or Electrical Engineering (ca. 5,800). Also, the number of IT specialists working in the Lublin-based companies is significant, estimated at more than 5,000 people.

In order to support the growth of IT industry, a project "Lublin IT Upland" is being implemented by the Lublin Municipal Office in cooperation with the Eastern ICT Cluster. The initiative is intended to emphasize IT potential in the city and create a favorable climate for the development of the IT industry in Lublin.

OFFICE SPACE MARKET

Up to 10 years ago in Lublin there was only 28,000 m² of modern office space. Along with the development of the services sector in the city, subsequent facilities were gradually established, built mainly by local developers. Currently, the existing office space in Lublin exceeds 100,000 m². In 2011 alone more than 23,000 m² of offices was delivered. At present, ca. 60,000 m² is under construction, including 14,000 m² within the LUBLIN Subzone.

One of the factors encouraging to locate operations in the city are the monthly rents whose cost vary between 9-12 EUR/m². At the same time, the city prepares subsequent areas for construction of office buildings. One example is the planned office district in Helenów, the area of today's trolleybuses depot, where tall buildings are to be built for services, offices and housing. Additional office space for service-oriented companies created as a result of the project is expected to reach as much as 100,000 m².

OFFICE AREA



total office area
107 563 m²



offices under construction
61 700 m²



planned offices
100 000 m²



STRENGTHS

- broad availability to well-qualified employees
- over 20,000 university graduates yearly
- growing number of foreign students at full-time programs
- low risk of attrition rate as compared to other regional capitals
- competitive level of remunerations
- dynamically developing market of office space
- office rents up to 20% lower than in central and western Poland
- Lublin Airport and growing number of direct flights to European capitals



Source: Asseco Business Solutions S.A.

BUSINESS SERVICES LEADERS |

ORANGE CUSTOMER SERVICE (OCS)

OCS is an integral part of Orange Polska. It was established as a merger of Telekomunikacja Polska and PTK Centertel customer service operations. The Lublin branch is responsible for comprehensive phone service of individual and corporate clients. It is the largest branch of the company providing this type of services in Poland.

PKO BANK POLSKI RETAIL CUSTOMER SERVICE CENTER

The Center is responsible for a comprehensive phone and e-mail service of PKO BP bank individual clients as well as companies belonging to the Group in Poland and abroad. The Center was awarded many times as the best contact centre in the banking sector in Poland.

ORANGE POLSKA ACCOUNTING SHARED SERVICES CENTRE (ASSC)

The Lublin-based Centre has operated since 2006. It performs comprehensive processing of the financial and accounting services for Orange Polska companies. ASSC has been awarded twice with a prestigious prize of SSON Excellence Awards in EMEA region: in 2009 it was recognized as the best Shared Service Center operating up to 3 years and recently, in May 2013, it won the title of the best SSC in the category of "Excellence in Culture Creation".

PROAMA

Proama is the fastest developing insurance company in Poland. It offers property insurance via Internet, telephone and agent network. The company currently employs 300 people, out of whom 220 work in Customer Service Department in Lublin in sales, claims adjustment, sales support, helpdesk, IT and HR.

IT LEADERS |

ASSECO BUSINESS SOLUTIONS S.A.

www.assecobs.pl

The company offers modern IT solutions such as integrated ERP systems supporting business processes in medium and large companies, applications for the management of small companies, advanced applications supporting HR departments, commercial data exchange platforms and comprehensive applications for businesses providing factoring services.

COMPUGROUP MEDICAL POLSKA SP. Z O.O. (CGM)

www.cgmpolska.pl

CGM is a manufacturer of modern software for the health care sector, including hospital systems and imaging diagnostics. The company owes its high position on the market to its comprehensive offer and innovative solutions based on Internet technologies. The solutions of the company are applied by the largest private medical practice networks and more than 150 hospitals in Poland and abroad.

BRITENET SP. Z O.O., BRANCH IN LUBLIN

www.britenet.com.pl

Britenet deals with overall outsourcing of IT resources, processes and business services. The company offers not only human resources takeover or comprehensive management of the client's staff, resources and technical infrastructure but also IT systems or the whole business process management. The offer of the company is targeted both at IT companies manufacturing software for third parties and organizations in need of software for their own use.



Source: Asseco Business Solutions S.A.

CLUSTERS

Lubelski Klaster Teleinformatyczny (ICT Lublin Cluster)

www.klaster.wlublinie.pl

An organization associating natural persons and companies operating in the broadly understood data communications industry, focused on supporting innovation, promoting companies, institutions, local government units, products, services and staff.

Wschodni Klaster ICT (Eastern ICT Cluster)

www.ecict.eu

An organization associating 97 entities from the IT and telecommunication industries, intended to generate competitive advantage and development of innovative projects.

Benefits for members of the cluster:

- common research-development actions permitting development of market advantage,
- increase in innovation,
- possibility to extend operations, mainly by small economic entities,
- optimisation of process of supplying products and services,
- easier access to EU funds.

Benefits for the cluster's clients:

- access to complex knowledge including several fields,
- in emergency situations support of reliable and competent group of service providers, experts in their areas of operation,
- optimization of costs of using external services,
- receiving of premium products and services,
- standardization of the service process.



Source: eLeader Sp. z o.o.



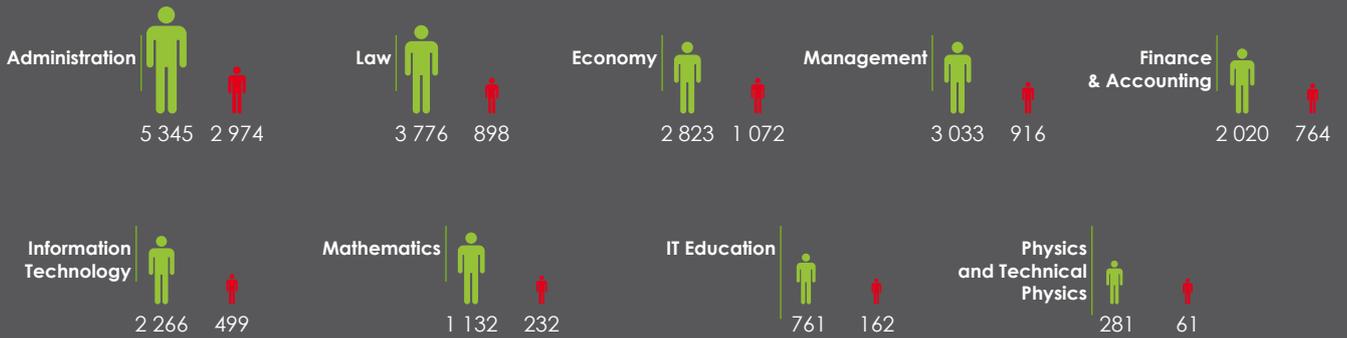
Source: UMCS

INTELLECTUAL POTENTIAL

FIELDS OF STUDY |

 **number of students** – academic year 2012/2013

 **number of graduates** – academic year 2012/2013

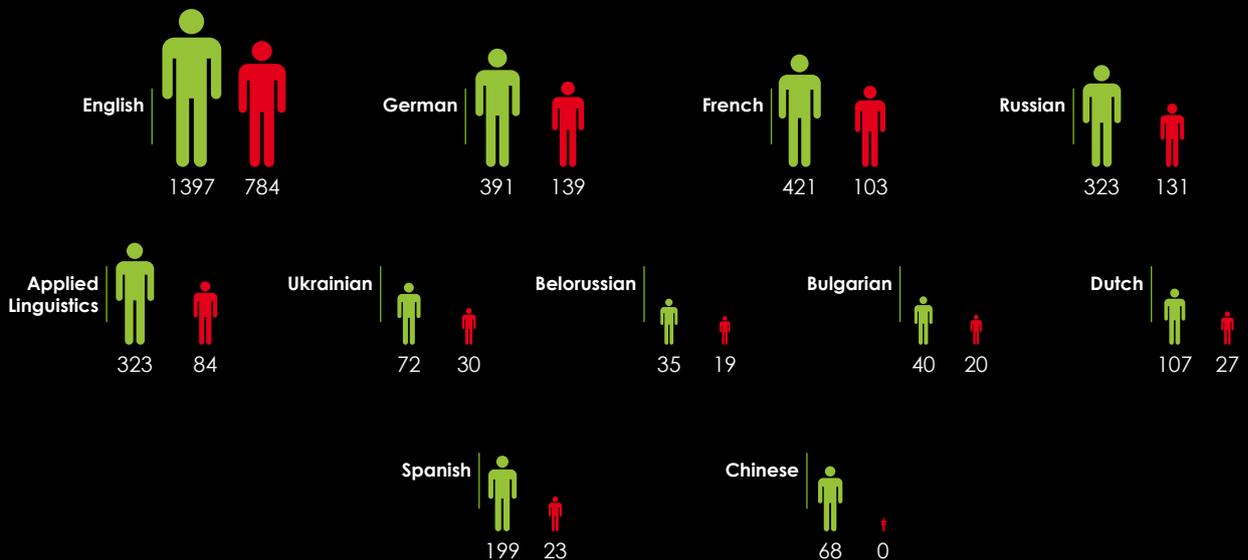


Self-study based on the data collected from universities and colleges in Lublin

FOREIGN LANGUAGE PROGRAMS |

 **number of students** – academic year 2012/2013

 **number of graduates** – academic year 2012/2013



Self-study based on the data collected from universities and colleges in Lublin

SUCCESS STORIES

Genpact Poland Sp. z o.o.

www.genpact.com

The world leader in business services and technology solutions, it provides services with regard to finance and accounting, debt collection, customer service, procurement and logistics, financial analysis and IT. The unit operating in Lublin deals with finance and accounting operations for foreign clients.

The decision to open the centre in Poland was an element of our global strategy and expand our capabilities to achieve best language competencies for Russian language delivery. In 2008 a decision was made to open an operations centre in Lublin. It was influenced by several factors such as high number of university graduates, young population, constantly developed infrastructure, lower costs of running a business and relatively lower attrition rate. The support provided by authorities of the Lublin City at the initial phase of operation was also of key importance.

Magdalena Dąbrowa-Karasińska
Director of Genpact Lublin

eLeader Sp. z o.o.

www.eleader.pl

The company is a world leader in mobile technologies and a supplier of smartphone applications for businesses. The innovative solutions designed here are applied in over 70 countries around the world. The company is also a certified Microsoft partner.

eLeader has been connected with Lublin since the very beginning of its operation. It is here that we have managed to develop a well-integrated team of specialists, consisting of graduates of the Lublin universities. Currently we carry out international projects, and our products are used in more than 70 countries worldwide, among others, by the greatest representatives of consumer goods sector, as well as the financial or FMCG sectors. Last year the company opened two foreign branches in order to support foreign expansion of the offered solutions. In terms of development opportunities for the scientific and business community, Lublin is by no means inferior to other large cities in Poland, and the local companies may conquer foreign markets with no complex whatsoever.

Piotr Jamrogiewicz
Marketing Manager

Infinite Sp. z o.o.

www.infinite.pl

The leading activity of the company is providing solutions within the scope of B2B integration in order to optimize transactions by automation of business partners' relations regardless of their sizes and technological resources.

Over the years much has changed in Lublin when it comes to the interest of the city authorities in IT industry; the universities are also more open to cooperation. We are continuously looking for people who want to work and develop in Infinite and so far we have achieved it in Lublin.

From the very beginning, namely since 2002, we have been employing graduates of the Lublin universities, among managerial staff many people began work as interns, currently they determine the directions of the company's development. In January this year we merged with one of the Lublin IT companies and we currently employ 180 people, providing solutions for companies in Poland and the whole Europe.

Mariusz Sławek
Vice President of the Management Board

Eastern ICT Cluster

www.ecict.eu

Majority of IT/ICT businesses in Lublin and Lubelskie region account for small and medium-sized companies which became a stimulus to create the Eastern ICT Cluster and co-operate in carrying out joint projects. Today, the cluster associates almost 100 companies which makes it one of the largest organizations of the kind in the country.

The cluster is an initiative functioning for over 6 years and the last three years brought along extraordinary growth in the number of: participants, national and international contacts, project initiatives and cooperation quality - entering areas of using, to a greater extent, B+R or greater complexity of projects and inter-sector projects. All this indicates the dynamics of the industry and good condition of the sector in our region. Achievements of the cluster indicated by external observers are, among others, organization of the only 3D technology fairs in Poland, significant position of the cluster on the market of SmartGrid experts or common participation in fairs of the Cluster members in the largest in Europe ICT Fairs - CeBit (with an innovative product "Lublin.location.2.0" developed as a result of cooperation of Teatr NN and companies from the cluster).

Robert Szlęzak
President of the Management Board