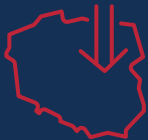


# AMERICAN FIRMS IN BUSINESS SERVICES IN POLAND, 2022



United States is the **NO. 1.**  
**FOREIGN INVESTOR**  
in business services sector in Poland



Source: ABSL

Business services sector  
in Poland includes



**1 714**  
**centers** employing **400 700**  
**people**

Source: ABSL



from **5.2% in 2020**  
to **6.2% in 2022**

share of business services employment  
in total business employment has increased,  
despite COVID-19 pandemic

Source: AmCham, Statistics Poland

Number of  
US-owned  
firms

**340**

20% of total number of  
business services centers  
92% growth since 2015



Source: ABSL

Employment  
in US-owned  
firms

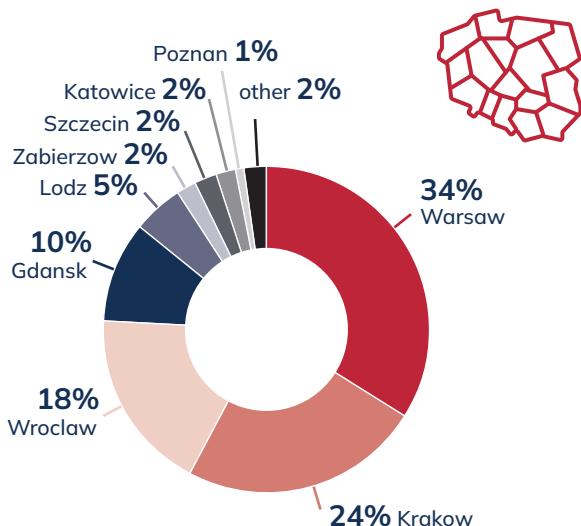
**112.3 K**

28% of total employment in the sector  
85% growth since 2015



Source: ABSL

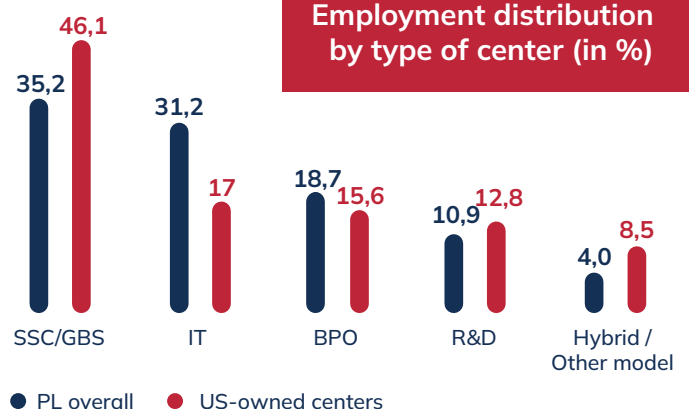
Location of US firms in business services  
sector by city (by employment)



Source: AmCham database, Orbis

**330 HEADCOUNTS**

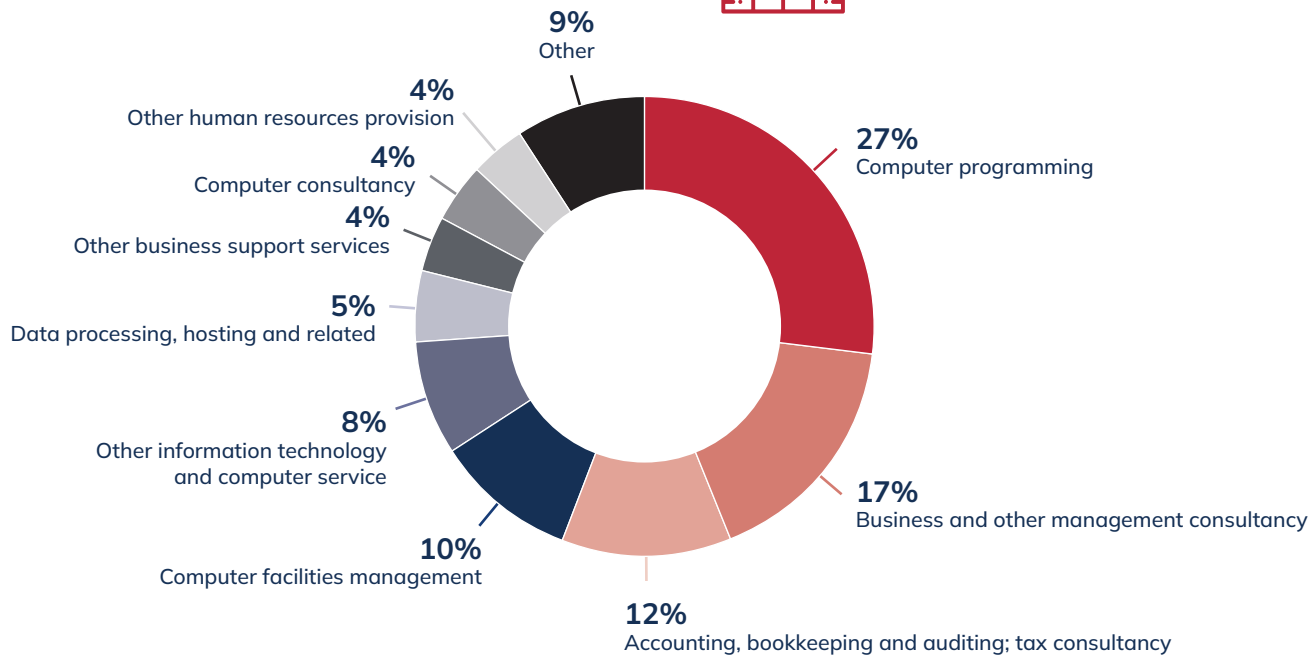
Average employment in US-owned centers  
in Poland in 2022 (average overall: 234 persons).



● PL overall ● US-owned centers

Source: ABSL

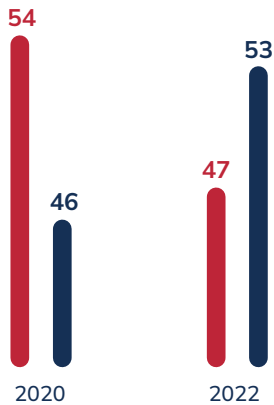
## Employment distribution by type of activity in US business service centers



## Distribution of activities in major cities, by employment

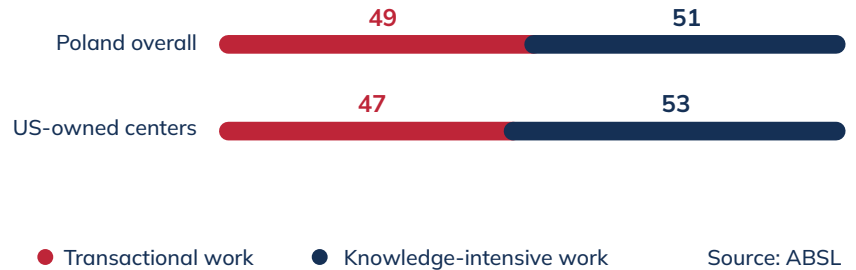
Activity	Major cities		
Computer programming	Warsaw (35%)	Krakow (29%)	Gdansk (18%)
Business and other management consultancy	Warsaw (69%)	Krakow (22%)	Wroclaw (5%)
Accounting, bookkeeping and auditing; tax consultancy	Wroclaw (39%)	Krakow (28%)	Warsaw (12%)
Computer facilities management	Wroclaw (89%)	Warsaw (11%)	
Other information technology and computer services	Warsaw (61%)	Krakow (37%)	Gdansk (2%)
Data processing, hosting and related	Wroclaw (40%)	Katowice (23%)	Gdansk (18%)
Other business support services	Warsaw (58%)	Krakow (31%)	Katowice (10%)
Computer consultancy	Gdansk (53%)	Szczecin (30%)	Warsaw (15%)
Other human resources provision	Lodz (100%)		
Other software publishing	Krakow (76%)	Gdansk (14%)	Szczecin (9%)
Activities of call centres	Krakow (89%)	Wroclaw (10%)	Warsaw (1%)
Publishing of computer games	Szczecin (96%)	Krakow (4%)	
Public relations and communication	Warsaw (62%)	Lodz (38%)	
Legal	Warsaw (69%)	Wroclaw (31%)	
Photocopying, document preparation and other specialised office support	Warsaw (91%)		
Employment placements	Warsaw (98%)		
Specialised design	Tychy (100%)		
Web portals	Krakow (79%)	Kobylanka (21%)	Warsaw (1%)
Other professional, scientific and technical	Warsaw (86%)	Gdansk (14%)	
Market research and public opinion polling	Warsaw (100%)		

US-owned companies have recently moved their activities into knowledge-intensive processes, which have increased from 46% to 53% in their total activities.



US-owned companies are operating in knowledge-intensive activities more than the sector average.

Proportion of Transactional work vs. Knowledge-intensive processes in 2022



## LATEST NEWS

In I'2021-VI'2022  
US firms hired

# 1 482 people



placing US investors as top foreign employers in the sector.

### Employment and number of centers established in I'2021-VI'2022

	employment	number
USA	1 482	9
Japan	1 415	6
Germany	881	8
France	650	3
Other	1 953	20
<b>Overall</b>	<b>6 381</b>	<b>46</b>

Source: ABSL

### Top 10 largest US business service centers

opened in I'2019-VI'2022 – list of largest contracts by office space leased

1. **Rockwell Automation**
2. **Motorola Solutions System**
3. **Sabre**
4. **Cisco**
5. **3M**
6. **IBM**
7. **Akamai**
8. **DXC Technology**
9. **Google**
10. **Intel**

Source: JLL

Space leased by **540 000 m<sup>2</sup>**  
U.S. companies in the period from the beginning of 2019 to July 2022.



Source: JLL

## Top US-owned business service centers in Poland by employment

	Company	Established	Activities	Location	Employment (2022)
1.	<b>CITI SOLUTIONS CENTER</b>	2005	Data processing, hosting and related; Computer programming	Warszawa, Olsztyn	6 004
2.	<b>STATE STREET</b>	2007	Accounting, bookkeeping and auditing	Krakow, Gdansk	6 000
3.	<b>KYNDRYL GLOBAL SERVICES DELIVERY CENTRE</b>	2009	Computer facilities management	Wroclaw, Katowice	5 231*
4.	<b>INTEL TECHNOLOGY</b>	1999	Computer programming	Gdansk	2 848
5.	<b>MOTOROLA SOLUTIONS SYSTEMS6p</b>	1999	Computer programming	Krakow	2 540
6.	<b>IBM BTO BUSINESS CONSULTING SERVICES</b>	2000	Accounting, bookkeeping and auditing	Krakow	2 214
7.	<b>BNY MELLON</b>	2007	Accounting, bookkeeping and auditing	Wroclaw	2 200
8.	<b>DXC TECHNOLOGY</b>	2016	Other information technology and computer services	Warsaw	2 100
9.	<b>PMI SERVICE CENTER EUROPE</b>	2005	Business and other management consultancy	Krakow	1 835*
10.	<b>PROCTER AND GAMBLE</b>	1991	Computer programming	Warsaw	1 817*
11.	<b>LUXOFT</b>	2010	Computer programming	Zabierzow	1 700
12.	<b>CISCO SYSTEMS</b>	1997	Other information technology and computer services	Krakow	1 655*
13.	<b>3M SERVICE CENTER EMEA</b>	2015	Data processing, hosting and related	Wroclaw	1 575
14.	<b>UPS GLOBAL SERVICES</b>	2014	Combined office administrative services	Wroclaw	1 492
15.	<b>EPAM SYSTEMS</b>	2011	Other software publishing	Krakow	1 364*
16.	<b>SABRE</b>	2000	Computer programming	Krakow	1 310
17.	<b>COGNIZANT TECHNOLOGY SOLUTIONS</b>	2011	Computer consultancy	Gdansk	1 292*
18.	<b>DIEBOLD NIXDORF BPO</b>	2001	Computer programming	Warsaw	1 161*
19.	<b>FRANKLIN TEMPLETON INVESTMENTS</b>	1997	Business and other management consultancy	Warsaw	938*
20.	<b>LIONBRIDGE</b>	1995	Computer programming	Warsaw	929*
21.	<b>HEWLETT PACKARD ENTERPRISE GLOBAL BUSINESS CENTER</b>	2004	Accounting, bookkeeping and auditing	Wroclaw	879
22.	<b>PEPSICO GLOBAL BUSINESS SERVICES</b>	2019	Computer programming; Accounting, bookkeeping and auditing	Krakow	681