



BPOland

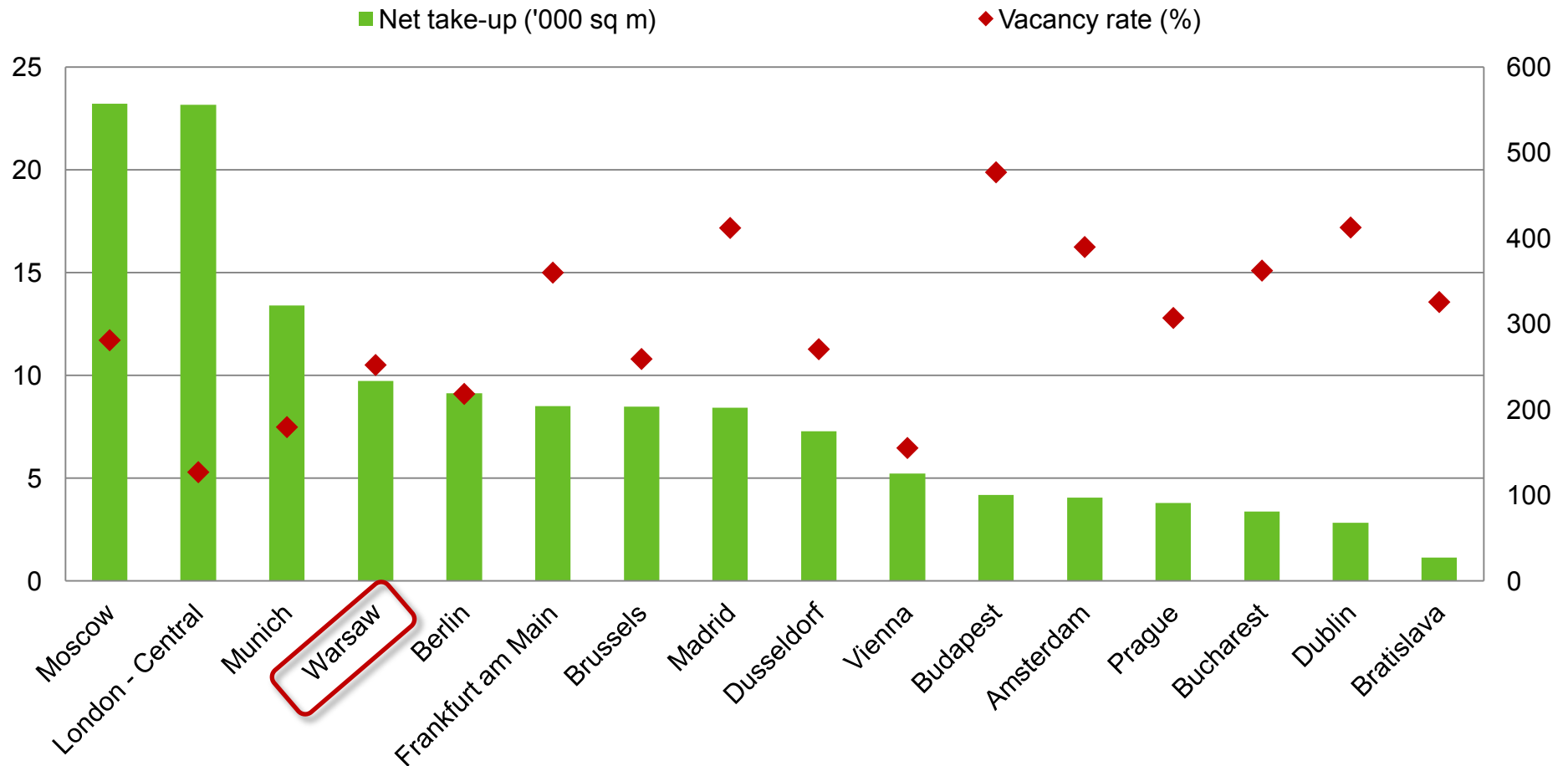
Office market

CBRE



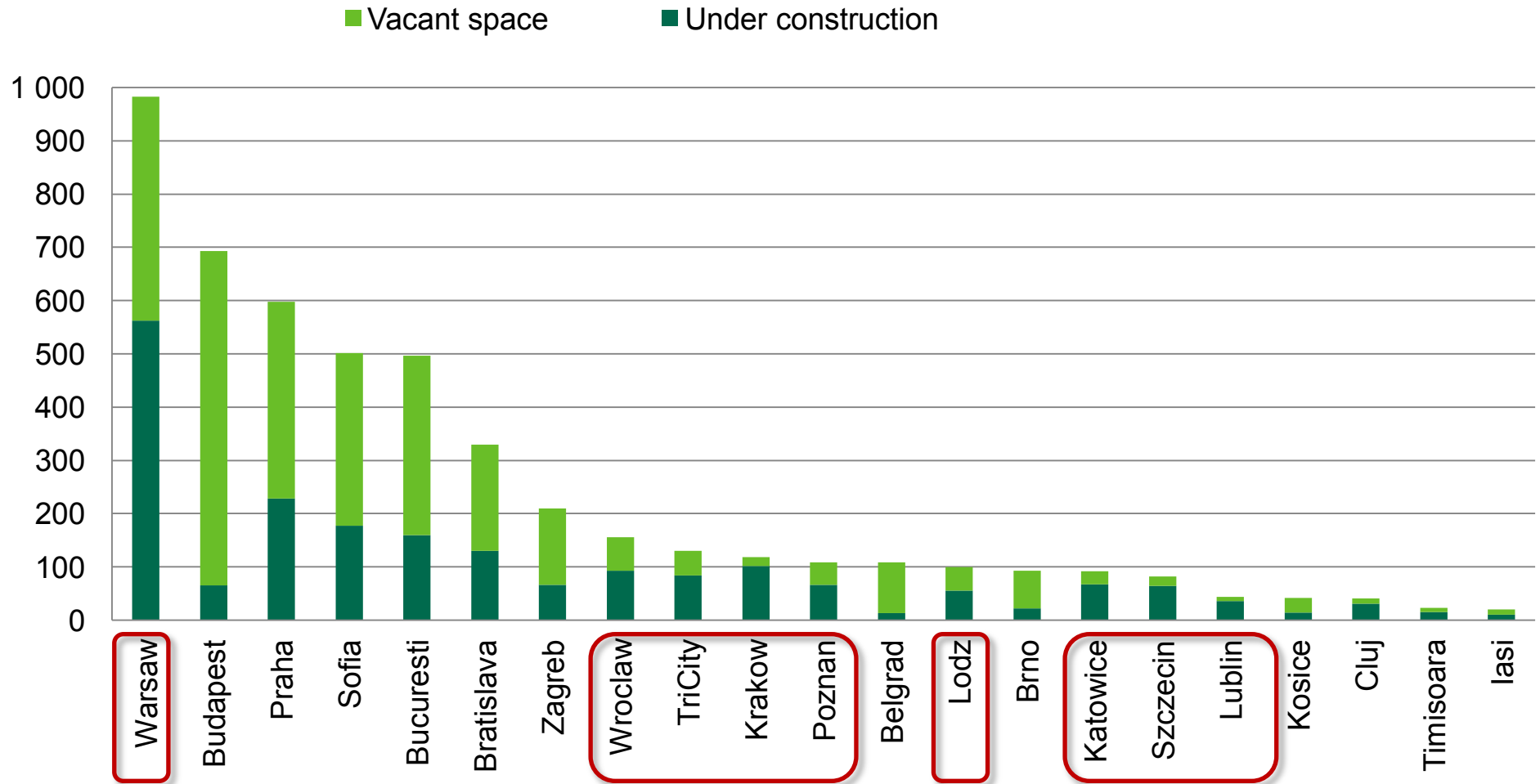
DEMAND AND VACANCY RATE IN H12013

➤ Warsaw among top locations in Europe in terms of leasing activity



OFFICE AVAILABILITY IN CEE (SQ M)

➤ Much higher office availability in regional cities in Poland than any other CEE country



OFFICE DEMAND IN MAJOR CITIES*

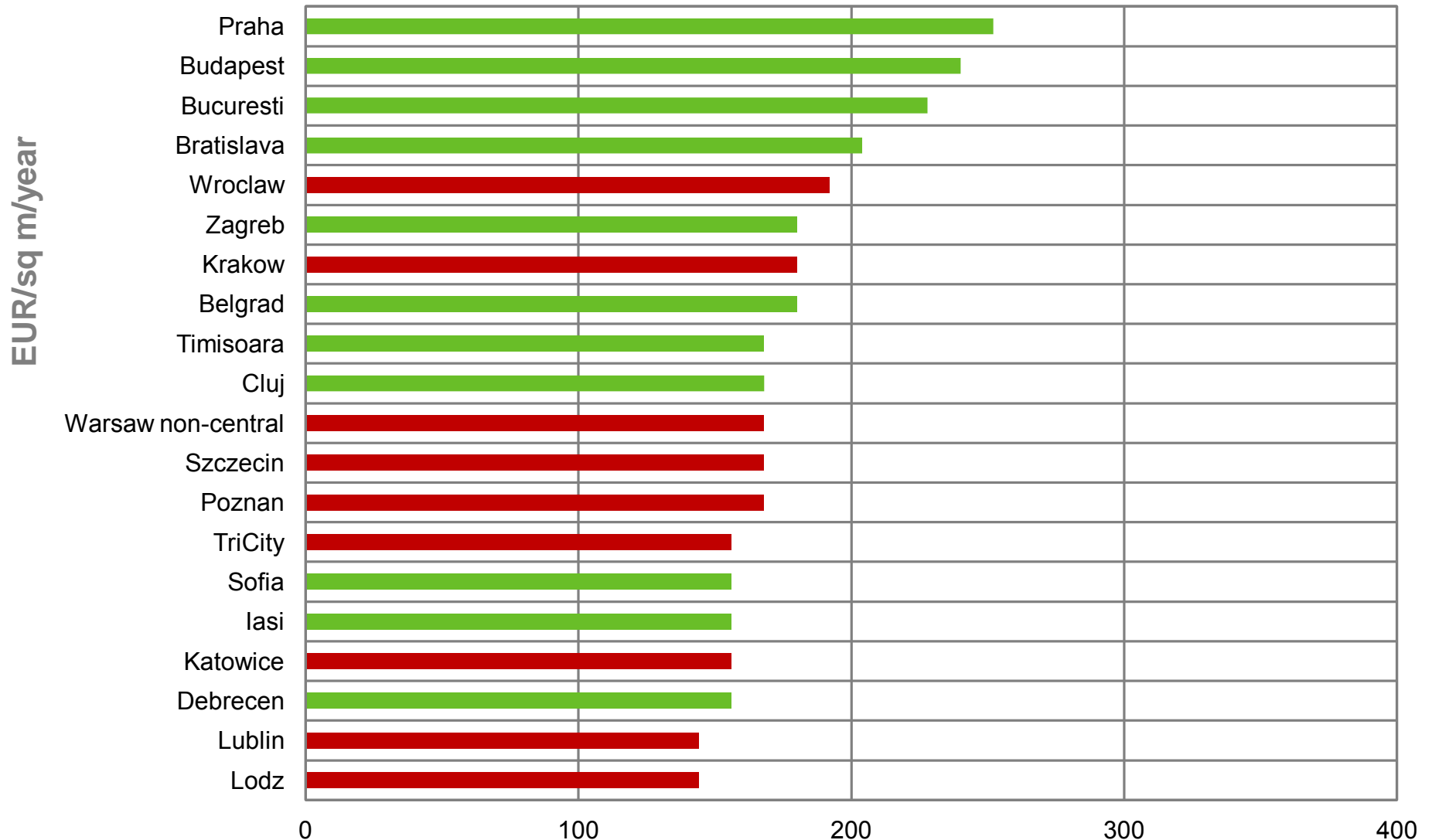
➤ SSC/BPO sector generates majority of the office demand in more and more cities



*(Leased space in 2011 – 2013 in sq m)

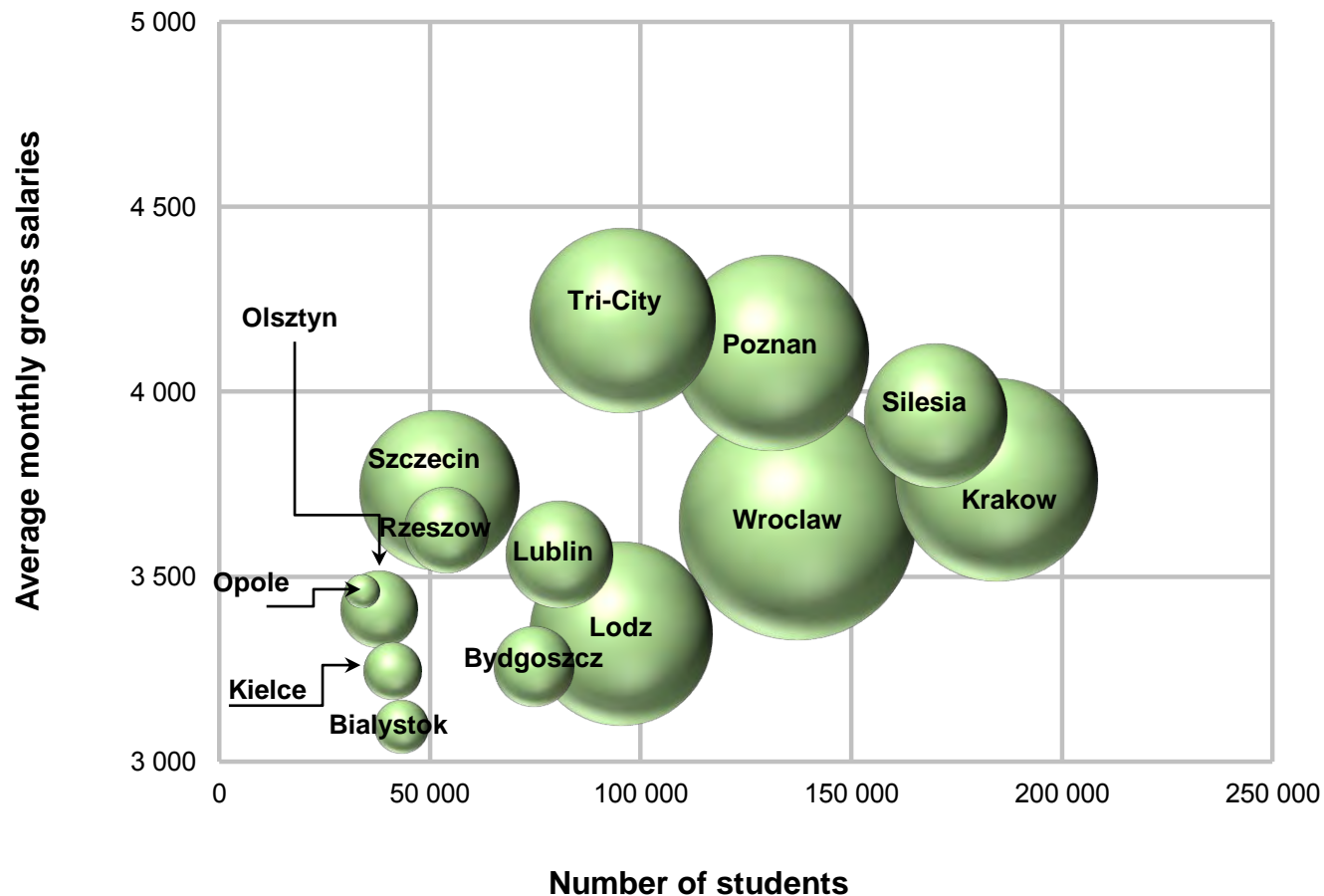
PRIME HEADLINE RENTS IN MAJOR BPO LOCATIONS

➤ Rents lower in Polish cities than in major competitors



REGIONAL CITIES COMPETITIVENESS MATRIX

➤ Tough competition between regional cities, difficult but not impossible task for aspiring cities



Source: Main Statistical Office, 2012, The size of the bubbles relates to the current availability of modern office space in sq m. i.e. space under construction and vacant;

QUESTIONS?

For more information regarding the Office Markets in Poland, please contact:

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