



Rybník

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THE ADECCO GROUP



Destination - Rybník

Labor market
and investment potential of Rybník

Destination – Rybník

1. Introduction

Foreword from Mayor of Rybník.

2. City outlook

Thanks to its location, combined with well-developed rail and road networks, Rybník has access to approx. 3.5 million potential employees and business partners able to commute in under an hour.

3. Human capital

Rybník, once associated primarily with mining and heavy industry is now considered to be a good location for modern industries and technologically advanced solutions.

4. Office market

In recent years one could notice increased activity of companies from the modern business services sector, who have been expanding their activities and hiring new employees in the region, which results in increased demand for office space.

5. Investor support and services

Investor relations and services are handled by dedicated employees of the City Hall, ensuring that investors will receive support at each stage of their business.

Rybnik, located in the Silesian province, forms the heart of an agglomeration inhabited by over 600,000 people. This location, in-between strong regional centers of Katowice and Ostrava (Czech Republic), combined with well-developed rail and road networks give the city access to approx. 3.5 million potential employees and business partners able to commute in under an hour.

Rybnik's key advantages include its inhabitants and entrepreneurs, who have been greatly changing its economic outlook over recent years. They are further supported by international companies, who chose to invest in Rybnik as a base from which they supply their goods and services to foreign markets.

As the city's mayor, I focus on development of necessary infrastructure to ease doing business in Rybnik. It includes, for example, extension of a two-lane expressway enabling quick travel between downtown and the A1 highway, crossing Rybnik's eastern districts. I also intend to strengthen the rail connections and cycling infrastructure, to act on Rybnik's strengths as a friendly European city open for new challenges and opportunities brought on by the inevitable energy transition of the region and country.

In Rybnik, we have been consistently developing recreational and sport areas and focus on investment lands. Particular care in this regard has been given to a downtown area marked for development of high-class office and business services sector properties. Mentioned area greatly increases the availability of modern office space and has already been popular among numerous companies with strong market positions domestically and internationally.

I heartily welcome you to reading this report on our city and to get in touch with one of many employees supporting entrepreneurs on all stages of investment.

Piotr Kuczera
Mayor of Rybnik



The "Śląskie 2030" regional development strategy for Silesia named Rybnik as so-called growth center, that is areas leading numerous economic and social processes.

Growth centers are of key importance for province's development and its position within the country and Europe.



How Rybnik is perceived?

Rybnik, as the centre of the functional agglomeration area, having access to over 600,000 residents, is an important socio-economic hub of the region, which actively strives to attract domestic and foreign investors.

Effective cooperation of local authorities with the commercial real estate industry, recruitment companies, universities and financial institutions allow to create a strong brand as an investment-friendly destination. Competitive advantages of Rybnik presented in this report, implies that the city has a potential to become a part of the Polish modern business services ecosystem.

Paweł Panczyj

Managing Director Strategy & Partnerships
ABSL



City outlook

Information on Rybnik and Rybnik agglomeration

Rybnik is among the largest and most populous cities in the Silesian province, being the center of an agglomeration* of over 600,000 people. Thus, the Rybnik agglomeration is the second largest urban area within Silesia and places among ten largest agglomerations in Poland, directly behind Szczecin.

The "Śląskie 2030" regional development strategy for Silesia named Rybnik as so-called growth center, that is areas leading numerous economic and social processes. Growth centers are of key importance for province's development and its position within the country and Europe.

The vicinity of A1 and A4 highways crossroad - one of Europe's largest motorway interchanges, well-developed road network, good transportation links, availability of wide recreation options are among Rybnik's key advantages contributing to its attractiveness and make it so well-suited for fostering business development.

Approx. 460 km of public roads crosses Rybnik, including: A1 highway, national way no. 78, voivodeship roads no. 935, 929, 925 and 920.

As a business center, Rybnik is railway hub of regional and national importance. It is well regionally connected with such cities as: Katowice, Bielsko-Biała, Wodzisław Śląski, Żory and Racibórz. The trains also depart towards Bohumín and Ostrava in Czech Republic. Rybnik also has regular train connections to Poland's key cities, such as Warsaw, Kraków, Wrocław, Poznań or Gdańsk, as well as nearby European capitals such as Prague, Vienna, Bratislava and Budapest.

Local public transportation services are rendered by Rybnik's Public Transport Authority. There are 40 daytime bus lines and 3 night lines operating in the city.



photo: Rybnik City Hall

* Rybnik agglomeration is continuous, functional urban area comprising of Rybnik - its center - and nearby towns and communes linked functionally and through transport links. Apart from Rybnik itself, the largest towns of the agglomeration include: Jastrzębie-Zdrój, Żory, Racibórz and Wodzisław Śląski.

Population, 2019



138,098

Rybnik
City

632,825

Agglomeration

4,517,635

Silesian
Province

Unemployment rate, 2020



4.4%

Rybnik
City

5.5%

Agglomeration

4.9%

Silesian
Province

Average gross monthly salary (in PLN), 2019



4,785

Rybnik
City

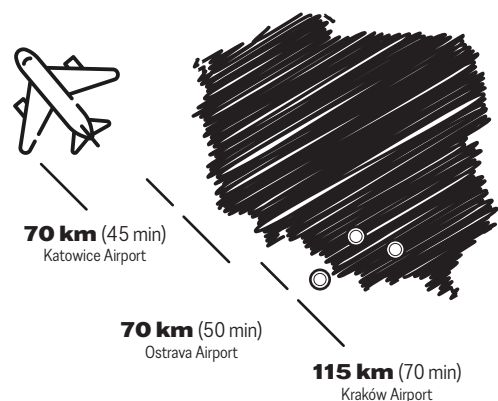
5,700

Agglomeration

5,178

Silesian
Province

The nearest international airports



Awards and distinctions

- **“Leader of local government investments 2017-2019” ranking of “Współnota” magazine:**
7th place among 48 cities with district status
- an average investment expenditure per capita of PLN 1,972.79.
- **“Leader of local government procurement of EU funds 2014 -2019” ranking of “Współnota” magazine:**
6th place among 48 cities with district status -
an average investment expenditure per capita of PLN 2,703.23.
- **Ranking of local governments by “Rzeczpospolita” magazine:**
12th place among 65 cities with district status
in ranking concerning sustainable development.
- **National ranking of the “Rowertour” magazine:**
15th place in 2018 national ranking for the most
bicycle-friendly city.



photo: Rybnik City Hall

How Rybnik is perceived?

We're a commercial research entity and Rybnik offers us the right conditions to work with innovative businesses and scientists from across the country and to globalize our offer.

The local market is brimming with experts and specialists who combine academic education with economic and commercial experience. It allows us to work with the leading global pharmaceutical brands and medical research centers, as well as to implement R&D projects for national and international market operators. We create our own research tools and online communication platforms used by hundreds of thousands of users. Rybnik is very conveniently linked with airports in Katowice, Kraków and Ostrava. The highway network practically nullifies any communication barriers, so that reaching Kraków, Wrocław, Warsaw or Vienna by car poses no problems.

Ewa Tkocz-Piszczyk, PhD

Vice Chairman of BioStat R&D Center and MedFile S.A.



Shopping facilities

The Rybnik agglomeration offers over 220,000 m² GLA of modern retail space, spread across 19 facilities. In Rybnik itself, there are 8 shopping centres with a combined 87,000 m² GLA. Among them, the largest are Focus Park and Rybnik Plaza, both built in 2007.

Focus Park is a shopping and entertainment centre of 17,900 m² GLA. It hosts, among others, a Multikino cinema and stores of Media Expert, C&A, New Yorker, Sinsay, Bershka, Stradivarius, Medicine, 4F, Smyk, Empik as well as KFC and Pizza Hut Express restaurants. Rybnik Plaza, on the other hand, provides 18,000 m² hosting, among others, a Stokrotka supermarket, stores of RTV Euro AGD, H&M, Reserved, Carry, CCC, Martes Sport, a Multikino cinema and the PINK bowling alley.

All major food operators active in Poland are present in Rybnik, including Auchan, Carrefour, Kaufland, Lidl, Netto and Biedronka. One can also find here a multitude of smaller retail centres and parks, as well as convenience centres- such as DH Domus, CH DL or PH at Kotucza street. Gastronomy and small shops are concentrated near the town square and Jana II Sobieskiego street as well as city promenade Powstańców Śląskich street. Rybnik agglomeration's retail offer is balanced both quantitatively and qualitatively and the combined annual purchasing power of its inhabitants amounts to PLN 16 bn.

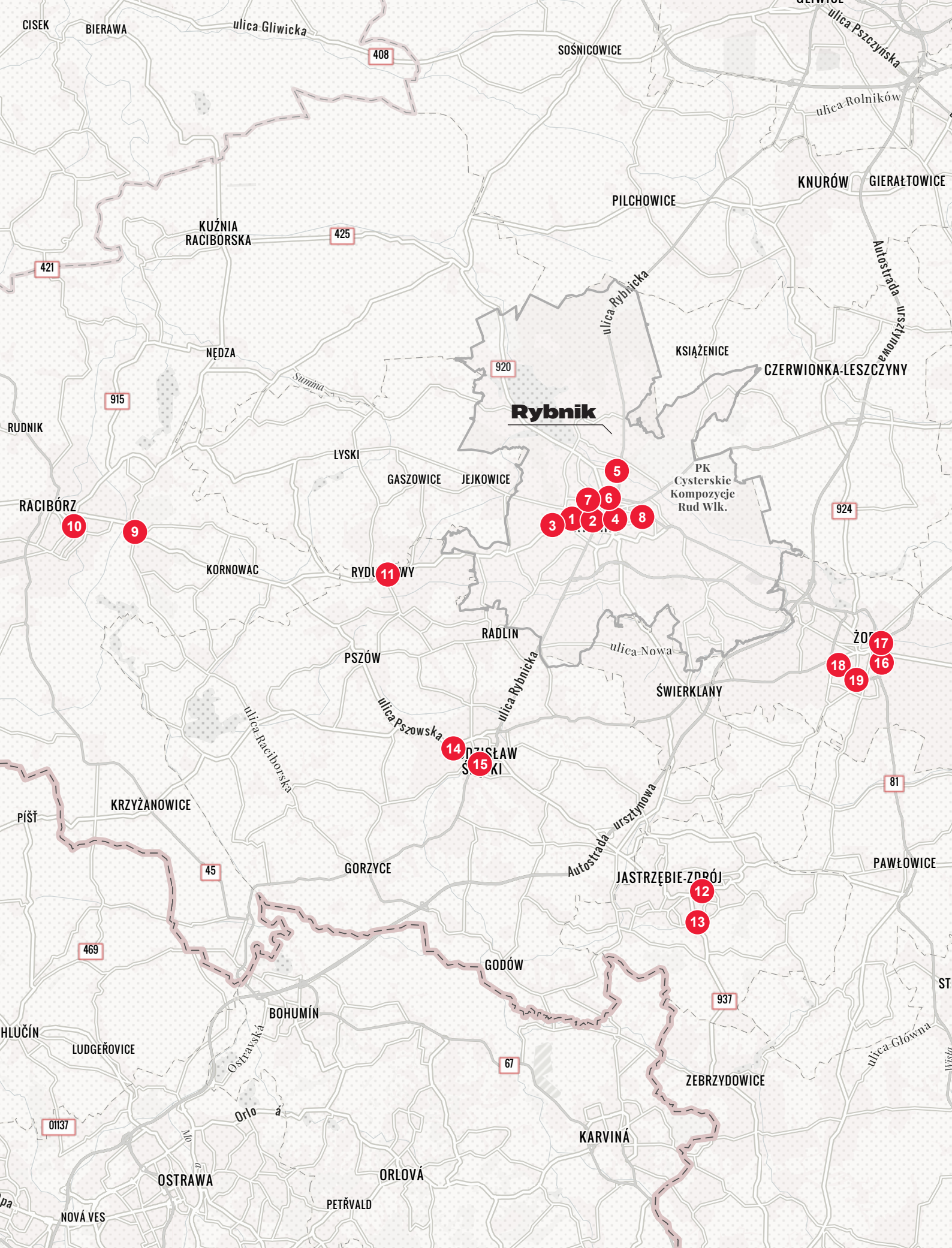
** Centrally managed modern retail space of over 5,000 m², with at least 10 retail and service outlets.*

Map of shopping centres:

- 1 - Auchan Rybnik
- 2 - DH Domus
- 3 - DL Shopping Center
- 4 - CH Focus Park
- 5 - Galeria Śląska
- 6 - Retail Park at Kotucza street
- 7 - Rybnik Plaza
- 8 - Tesco Rybnik
- 9 - Auchan Racibórz (Racibórz)
- 10 - Galeria Młyńska (Racibórz)
- 11 - Galeria Rydułtowy (Rydułtowy)
- 12 - Galeria Jastrzębie (Jastrzębie-Zdrój)
- 13 - Galeria Zdrój (Jastrzębie-Zdrój)
- 14 - Carrefour Wodzisław Śląski (Wodzisław Śląski)
- 15 - Galeria Karuzela (Wodzisław Śląski)
- 16 - Auchan Żory (Żory)
- 17 - Galeria Wiślanka (Żory)
- 18 - Żory Retail Park (Żory)
- 19 - S1 Center Retail Park (Żory)



photo: Rybnik City Hall



Recreational areas

Quality of life and recreational infrastructure is of vital importance for city's inhabitants, students and tourists alike. Rybnik hosts numerous restaurants and catering establishments, located primarily in the city center - particularly around the main square and along the promenade leading to Saint Anthony of Padua Basilica.

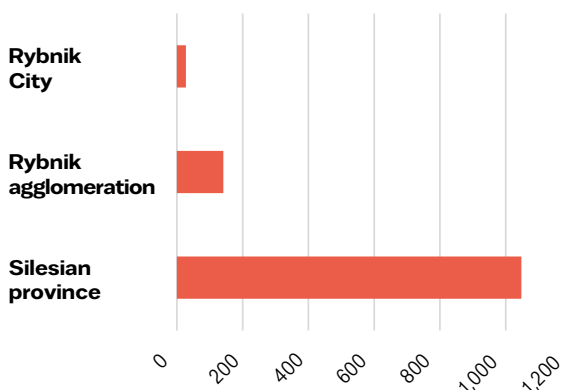
The city also has a rich cultural offer, including the renowned Rybnik Theater and other public and private cultural institutions. Many concerts, conferences and other cultural events are organized here, including Ogólnopolski Festiwal Piosenki Artystycznej OFPA, Rybnicka Majówka, Górnośląska Nagroda Literacka „Juliusz” or Rybnicka Jesień Kabaretowa „Ryjek”.

The city also offers many recreational areas, such as: the Rybnik Lake, perfect for relaxation, yachting or windsurfing or the Ruda river, on which many kayaking trips are organized. Another of the city's key advantages is the Rybnik-Gotartowice civil sport airfield. These are further strengthened by a wide recreational base in the form of athletics stadium, numerous sports pitches, gyms, parks, open-air and indoor swimming pools, narrow gauge railway, rollerskating track and the bicycle track in the Wiśniowiec Park, ensuring the city may provide active recreation options for everyone.

Cycling infrastructure

For several years, Rybnik had seen investments related to development of modern, low-emission transportation, including expansion of cycling infrastructure. Currently, there are approx. 30 km of cycling routes and their further extensions are under development. Notably, the city also has a well-developed network of recreational cycling routes, of over 170 km total length. Currently, 38 public bicycle stations have been made available.

Length of bicycle paths, 2019 (km)



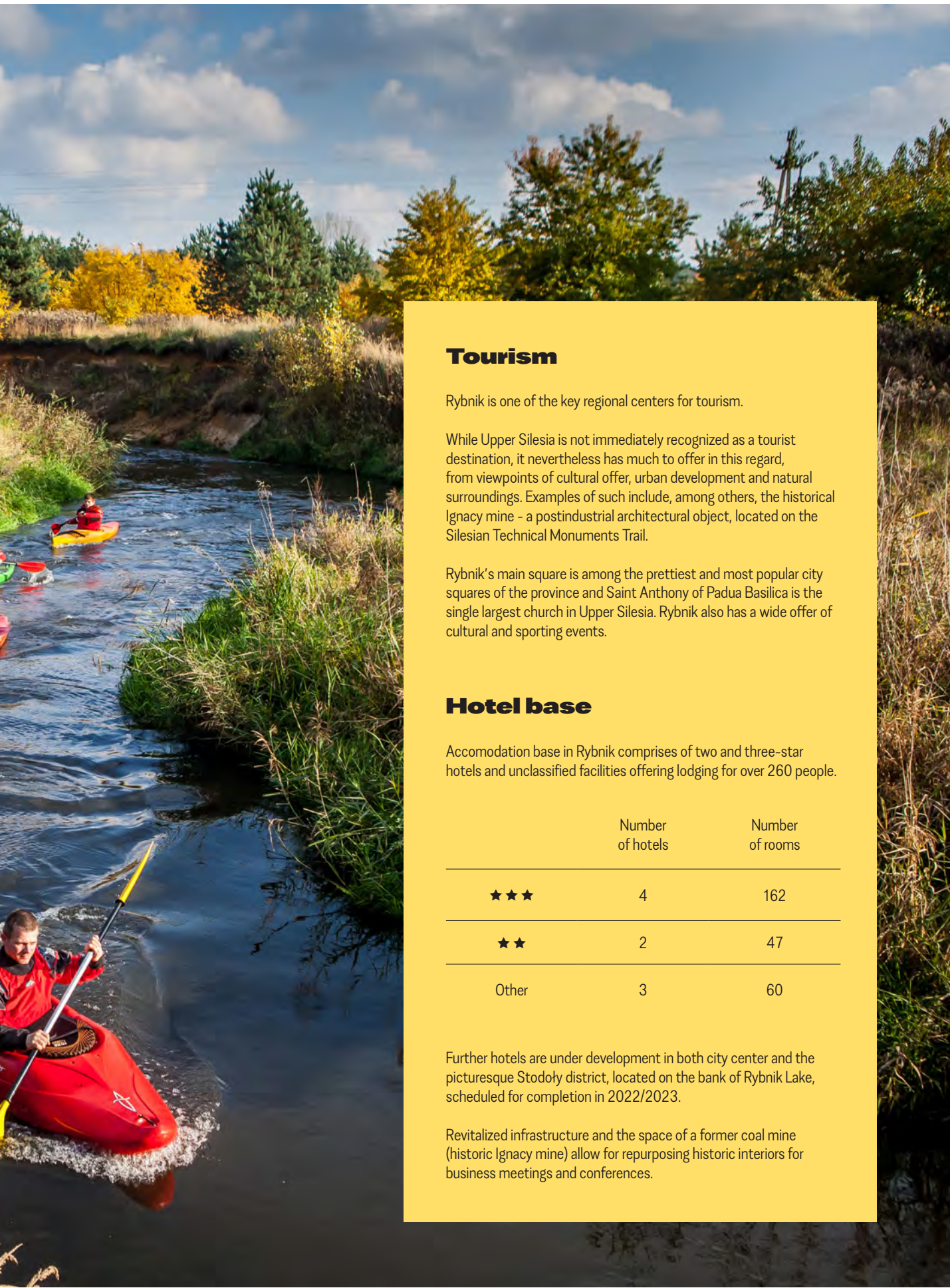


photo: Rybnik City Hall

Tourism

Rybnik is one of the key regional centers for tourism.

While Upper Silesia is not immediately recognized as a tourist destination, it nevertheless has much to offer in this regard, from viewpoints of cultural offer, urban development and natural surroundings. Examples of such include, among others, the historical Ignacy mine - a postindustrial architectural object, located on the Silesian Technical Monuments Trail.

Rybnik’s main square is among the prettiest and most popular city squares of the province and Saint Anthony of Padua Basilica is the single largest church in Upper Silesia. Rybnik also has a wide offer of cultural and sporting events.

Hotel base

Accommodation base in Rybnik comprises of two and three-star hotels and unclassified facilities offering lodging for over 260 people.

	Number of hotels	Number of rooms
★★★	4	162
★★	2	47
Other	3	60

Further hotels are under development in both city center and the picturesque Stodoły district, located on the bank of Rybnik Lake, scheduled for completion in 2022/2023.

Revitalized infrastructure and the space of a former coal mine (historic Ignacy mine) allow for repurposing historic interiors for business meetings and conferences.

An aerial photograph of Rybnik City Hall, a large, historic building with a red-tiled roof and multiple dormers. The building is surrounded by lush green trees. In the background, a city skyline is visible under a dramatic sunset sky with golden light and scattered clouds. An orange text box is overlaid on the left side of the image.

The Fraunhofer Project Center

The Fraunhofer Project Center is planned to be established in Rybnik at the Silesian University of Technology bringing together scientists and entrepreneurs. The center is to operate under the name of Advanced Intelligent Technologies for a Green Future.

Higher education

Silesian Province is among Poland's strongest provinces when it comes to higher education - at over 110,000 students and approx. 30,000 graduates each year. There is a total of 8 universities within the Rybnik agglomeration, three of which are located in the city of Rybnik itself and educate highly qualified cadres in many disciplines, including:

- **Finances and accounting,**
- **Management,**
- **Business and management psychology,**
- **English, German, Czech language studies,**
- **Graphic design,**
- **Pedagogics,**
- **Academy of Business Management 3.0 (postgraduate studies taught in English),**
- **English for Business, Law and Administration (postgraduate studies taught in English),**
- **MS Excel and VBA in business (postgraduate studies taught in English),**
- **Master of Business Administration (MBA).**

Furthermore, there are ongoing plans to create a medical university in Rybnik. The works to that end are based on a letter of intent, signed in December 2020 by Marshal's Office of the Silesia Province, City of Rybnik and the Association of Municipalities and Districts of Western Sub-region of Silesian Province. The Ministry of Education is currently involved in the project. The university is to operate on the campus near Rudzka street, in close vicinity of the Economic University branch and is to offer both both stationary and non-stationary studies.

According to a letter of intent, signed in January 2021 by Marshal of the Silesia Province, Mayor of Rybnik and Rector of the Silesian University of Technology, the city is also to see the opening of Fraunhofer Project Center. The center is to operate under the name "Advanced Intelligent Technologies for a Green Future". It will work in close cooperation with the Fraunhofer Society in Munich and the Fraunhofer University in Chemnitz - one of the largest, most innovative and influential scientific organizations supporting European industries.



Number of universities in Silesian Province, 2019

Students and graduates, 2019

Area	Students
Racibórz county	1,306
Wodzisław county	120
Jastrzębie-Zdrój City	56
Rybnik City	360
Żory City	407
Silesian Province	112,696

Universities

Rybnik City

Branch of the Silesian University of Technology
- Center for Lifelong Learning

Branch of the University of Economics in Katowice

Branch of College of Business and Health Sciences

Agglomeration

University of Security - Jastrzębie-Zdrój branch

Katowice Business University - Żory branch

State Higher Vocational School in Racibórz

University of Humanities and Economics in Łódź
- Wodzisław Śląski branch

University College of Enterprise and Administration in Lublin
- Wodzisław Śląski branch

Human capital

Labor market

In the recent years, Rybnik's labor market has undergone a transformation that further accelerated in early 2021. The city, once associated primarily with mining and heavy industry is now considered to be a good location for modern industries and technologically advanced solutions

The above statement has been reflected in the unemployment rate, which had been systematically decreasing between 2013 (8.3%), to eventually reach the record low of 3% in Q2 2019.

The past year, 2020, saw the unemployment rate rise to 4.4% in Q4, with a slight growth tendency remained throughout early months of 2021, according to GUS data. However, it bears mentioning that increased unemployment in said period is a national trend related to the COVID-19 pandemic. From that viewpoint, Rybnik has a lower average unemployment rate than the entirety of Silesia (in Q4 it amounted to 4.9% for the entire province).

The city's location supports its dynamic growth and closeness to the Czech Republic and major urban centers, with their dense population and infrastructure, imparts pressure to maintain competitiveness. The nearby Katowice agglomeration and Bielsko-Biala, with their record low unemployment rates (1.7% and 2.7%, respectively, by the end of 2020) create a comfortable situation for Rybnik. High density of businesses in the abovementioned locations has caused a reduction in the number of available workers, also in the closest cities and districts. Rybnik, with its large area (16th largest in Poland, at 148.36 km²), 140,000 inhabitants (25th largest in Poland) and nearby towns (Żory, Jastrzębie-Zdrój, Wodzisław Śląski, Racibórz - all with higher unemployment rates) has become a natural destination for investors and jobseekers.

The direction of Rybnik's development, in terms of the labor market, is set by its administration, investors and inhabitants alike. Recently, we have seen the announcement of upcoming modernization of Rybnik's power plant, to be retooled from coal-powered to gas-powered, in order to reduce its emissions. It coincided with recent protests against exploitation of a new coal vein, which saw the city administration fully agree with the protesting inhabitants. In 2020 the RYFAMA machine factory (of FAMUR group) has been closed, after over a century on the market. It does not, however, mean that heavy industry in Rybnik is in a bad shape. Competitive and modern companies can utilize the support of local administration, best exemplified by Tesko Steel, a steel distributor, who in the recent years had implemented record-breaking investments and expanded its team by a notable number of specialists. One can observe a restructuring of the economy and - what naturally follows - Rybnik's labor market.

Rybnik is a place where new technologies are being developed and the number of job offers for specialists in this area is ever-increasing. The IT sector is a great example of this. Despite the pandemic and downsized recruitment over 2020 - leading to a 40% drop in the number of published offers, as compared to 2019 - IT was the only sector to still mark an increase (+17.6%).

A positive trend is also visible among the unemployed, with the share of unemployed people with middle and higher education steadily decreasing (from over 35% in 2016 to 30.7% in 2020). This data allows us to retain a certain optimism towards the situation of workers, who increasingly often find work within this region of Poland.



photo: Shutterstock

Employed in communes*

Area	2018	2019
Silesian Province	1,248,744	1,260,365
Rybnik Agglomeration	147,272	150,249
Rybnik City	39,591	41,094

* not including those employed in state entities acting within the scope of national defense and security, working in individual agricultural holdings, priests and employees of NGOs, foundations and associations; not including economic entities employing only up to 9 people (since 2000). Based on actual places of work and type of activity (since 2004).

How Rybnik is perceived?

Digitree Group S.A. has been linked with Rybnik for many years. In 2011 it became the first local company with an IPO on NewConnect stock exchange and in 2016 it moved to the the primary market of the Warsaw Stock Exchange.

Ever since founding of our company, we have created and developed the e-mail marketing industry, earning distinctions from Deloitte or Puls Biznesu magazine, among others. Nowadays, as a technological group consisting of several dynamically operating companies, we provide comprehensive solutions for the e-commerce sector, develop marketing automation technology and e-mail marketing and implement innovative development projects in close cooperation with the National Centre for Research and Development. Last year, we have reached an income of PLN 54 million, placing us in close leadership within the industry on a national scale.

The company is headquartered in Rybnik. Two out of our seven offices are located here, as well as 150 out of 300 highly qualified IT, digital and e-commerce marketing specialists. Rybnik's location grants access to a large labor market and moreover it has a very interesting cultural, recreational and sporting offer.

Rafał Zakrzewski

CEO Digitree Group





How Rybnik is perceived?

Rybnik is a city where new technologies are developing, and thus there more job offers for specialists in this area appears.

A good example is the IT industry, which, despite the pandemic and limited recruitment in 2020, was the only one to record increases (+ 17.6%).

Adam Gałeczka

The Adecco Group
Branch Director – Silesia Region

photo: Rybnik City Hall

Office market

Modern office space

Rybnik offers the largest supply of office space within the agglomeration. In the past few years, city hall actively worked towards promoting Rybnik as an attractive destination for tenants from the modern business services sector, highlighting its advantages and potential.

There is a total of 8 modern office buildings in Rybnik, with a combined 27,000 m² of office space up to the modern standards. It can be read as an indicator of the market's early stage of development. Much of the existing office space is located in tenements, older office buildings and repurposed residential apartments. Their tenants comprise mostly of local businesses. Moreover, banks and other financial institutions tend to prefer tenements in the city center, due to their recognizability. New office projects over the past 10 years were developed primarily by local developers, who themselves are often also their main tenants.

Office buildings are concentrated primarily in the central part of town - the Śródmieście district and ones adjacent to it: Rybnik-Północ, Paruszowiec-Piaski, Smolna and Zamysłów - due to its great transport accessibility.

The largest existing office projects include K1, a class A office building modernized in 2016. The 12-floor, glazed skyscraper offering 11,000 m² of office space in the highest of standards is a flagship project of the agglomeration. Since the project has been of high interest to corporate tenants, the developer had decided to renovate the neighboring 1,500 m² building to prepare it for office tenants.

The newest projects include the headquarters of Gral Aluminium, put into market in 2018 and offering office space to other entities. The Ballyvessey Business Park, located by the power plant, has been offering office and warehousing space since 2012. Rybnik also has an active business incubator, "Ośrodek Biznesu", operating under Upper Silesian Agency for Enterprise Development and located at Jankowicka 23/25 street.

When describing Rybnik's office market one has to mention the projects of DMS, a local developer. These include the historic "Trzynastka" building, covered with the protection of the city historic preservation officer, the renovated building of former Silesia Ironworks and the sole project currently under construction - an office building occupying the space of a former PKS depot at Jankowicka street. There is high interest in the project and negotiations with a company from IT sector wanting to adapt the building for their needs are underway.

A single office building is currently in the planning phase, set to replace a parking lot near the City Hall and to offer approx. 8,000 m² of office space.

In recent years one could notice increased activity of companies from the modern business services sector, who have been expanding their activities and hiring new employees in Silesia, which results in increased demand for office space. Typical tenant requirements depend on their business activity profiles and the size of rented office space. Business services companies - law firms, consultancies and financial institutions, prefer office buildings in the city center.



photo: Rybnik City Hall

An important factor such tenants take into account when choosing a location is the transport accessibility by car and public transport, number of parking spaces, public transport stops and the visibility of the office building itself, which supports company's image and prestige.

Office projects located outside the city center attract primarily tenants from the industrial, pharmaceutical and technological sectors, as well as so-called back office services for BPO/SSC. The tenants renting space outside city centers are usually less demanding and accept lower standards of office space (class B). Instead, they prefer greater availability of parking spaces and public transportation.

The vacancy rate in Rybnik, for the class A and B buildings depicted on map amounted to 4% by the end of May 2021, which amounts to approx. 1,100 m² of available office space.

The average rent rate in older buildings amounts to approx. EUR 5-6.5/m²/month, while in the newer buildings it's closer to EUR 7-9/m²/month.

Rybnik's potential will be increasingly noticeable for developers and tenants alike, resulting in systematic growth of office investments in the city. For the coming years, we expect the market growth to continue and the tenant interest to grow.

Selected tenants in Rybnik

Tenant	Building
Coca Cola HSBC	Ballyvessey Business Park
Beghelli	Ballyvessey Business Park
Nexum	Ballyvessey Business Park
Future Processing	Ballyvessey Business Park
ING Bank Śląski	K1
FireUp Software	K1
Creativestyle	K1
Politan	K1
PKO BP	K1
SEKOM	Silesia
ZAKS	Silesia





How is Rybnik perceived?

Rybnik distinguishes itself within Silesia as one of the largest and most populous cities in the region, forming perfect environment for business development.

Close vicinity of the A1 highway and two key airports - Katowice-Pyrzowice (70 km) and Ostrava (70 km) - makes Rybnik's location particularly attractive for entrepreneurs working on both national and international scales. Moreover, the dynamically growing local economy, numerous infrastructural investments and care for the natural environment make Rybnik very attractive for living and work.

Barbara Pryszcz

Regional Director | Katowice
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Colliers

Investor support and services

Investment offer

Rybnik is very open towards the modern business services sector. Its Mayor had established a special project group, involving City Hall officials, business representatives, architects and urban planners.

Their works focus on amending the local spatial development plan and pre-existing road layout in a selected area within the city center. The city is preparing a real estate offer for potential investors - both municipal and private - and leads talks with real estate owners willing to implement office investments for future BSS sector tenants. It is within this area that the highest quality office space is being developed. The area has great communication links - its vicinity includes a train station and cycling routes and the A1 highway lies mere 10 minutes by car.

Rybnik has very attractive investment areas, prepared for modern production, service and warehousing facilities. Great placement near critical transportation links - A1 and A4 highways, expressway no. 78 - forms a strong impulse for the city's economic development. At the same time, it pushes towards creation of further investment areas, which in the near future will form an attractive offer for potential investors.

Support of dedicated employees

Investor relations and services are handled by dedicated employees of the City Hall. It ensures that investors will receive support at each stage of their business. The team has been highlighted in this year's "Gmina na 5!" report, created by the Institute of Enterprise of the Warsaw School of Economics.

To ensure comprehensive investor services, the city also cooperates with Polish Agency for Information and Foreign Investments, Silesian Investor and Exporter Service Center, as well as various business organizations and entrepreneurs associations. A key advantage of Rybnik is preferential income tax benefits for new investments, implemented with the help of Katowice Special Economic Zone.

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photo: Rybnik City Hall

Selected companies operating in Rybnik:



CENTRUM BADAWCZO-ROZWOJOWE

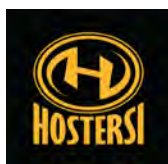




photo: Rybnik City Hall

Destination – Rybnik

Labor market
and investment potential of Rybnik



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