

# INVESTMENT POTENTIAL OF POLISH CITIES. REPORT

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# **INVESTMENT POTENTIAL OF POLISH CITIES REPORT**

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POLISH CITIES  
FORUM ABROAD

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# CITIES TO CARRY POLAND INTO THE FUTURE

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**Ladies and gentlemen,**

Not so long ago, Poland, like other countries in our region, was a country of structural change, which dramatically needed investment. In return, we offered low costs of conducting business activity, combined with great commitment and fast growing competence of Polish employees.

However, a lot has changed since the beginning of the transformation. For years, Poland has been one of the European leaders in terms of GDP dynamics, with its economy evolving towards more and more innovative industries, and the benefits of cheap production have been replaced by increasingly higher competences and flexibility of the talent pool, the possibility of creating technologically advanced supply chains and openness within the European Union market. And now it is all the more important not to stop. Cities, especially the large ones, will play a huge role in sustaining the dynamic development of the economy and, above all, in giving it a new quality. They will serve as an inspiration and a model for others to follow.

All around the world, agglomerations are becoming catalysts for change, attracting new residents and, with them, new businesses and, what is particularly important in the era of economy based on innovation and creativity, new ideas. Metropolises often initiate these changes themselves, thanks to more and more active universities and money coming for instance from EU subsidies, which allows to support innovative projects. However, this does not mean that cities, while developing, at the same time depreciate what is around them. On the contrary—they activate their closer and more distant surroundings. It is on the outskirts of cities that large logistics centres, modern warehouse space and new production plants are located. The role of agglomeration areas is also growing thanks to the fact that the whole country has been included in the Polish Investment Zone project, which grants all investors—under certain conditions, of course—similar concessions and incentives as those available in special economic zones. Besides, cities themselves have also changed. Each is different, each has its own strengths, which it is aware of and which it wants to use as an incentive attracting new investors instead of tempting them with the promise of low wages and high tax allowances. Polish cities know their value. They know that it is the right quality of life and satisfied residents that best appeal to the imagination of potential investors. And exactly this sphere is to work like a magnet for modern business, and at the same time a stimulus for further sustainable development, which the whole country will benefit from. What are the big Polish cities like today? Modern, dynamic, creative and open. We have attempted to paint a portrait the 10 key cities, which can freely compete for new investments with the agglomerations of Europe and the world. It is worth looking at our cities from this perspective, if only to see how far we have come in the last 30 years.

**Enjoy this report!**

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# THE UGLY DUCKLING TURNING INTO A BEAUTIFUL SWAN

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prof. Witold M. Orłowski

The history of building Poland's investment attractiveness can be compared to Andersen's fairy tale about the ugly duckling. When in 1990 we started our march towards normality, the situation seemed almost hopeless. The economy was ruined after decades of communism, Poles' income was low and factories based on archaic technologies were falling into ruin whilst underinvested infrastructure was disintegrating. Czechoslovakia and Hungary at that time seemed happy and rich compared to us, and Prague and Budapest—when compared to Warsaw—looked like royal peacocks confronted with a wet hen—or rather a starving, ugly duckling. No wonder that despite the interest in our reforms, foreign investors tended to avoid Poland by all means.

And yet something unexpected happened. Doomed to fail, Poland has moved forward, recorded the largest increase in production among all the countries undergoing transformation, and has been one of the fastest growing countries in Europe for the last twenty five years. Already in the mid-1990s it became the largest recipient of foreign investment in the region. Thanks to its economic growth and financial stability, the affluence of Poles and the size of the domestic market have increased. Thanks to Poland's membership in the European Union, manufacturers have gained unrestricted access to the Community market. Thanks to a radical improvement in the state of infrastructure, both large industrial investments as well as new projects in the service sectors, using the opportunities created by new technologies, have become possible.

The ugly duckling from the early 1990s may not yet be a beautiful swan, but it has certainly gained a lot of attractiveness and has become one of the most highly ranked investment locations in the world.

## **The changing investment attractiveness**

In the Doing Business ranking prepared by the World Bank, which analyses the ease of conducting business activity, Poland currently ranks as 33<sup>rd</sup> in the world among the 190 analysed

**Is Poland  
an attractive  
country for  
potential  
investors?  
And if so, what  
can we do to  
maintain and  
strengthen our  
position in this  
area?**





countries. This places Poland ahead of its main regional rivals (the Czech Republic, Hungary, Romania, Turkey) and above the average for the EU countries (it is much easier to do business in the UK, Scandinavian and Baltic countries; similarly easy in Germany and France and more difficult in most countries in the eastern and southern part of the EU).

Poland offers relatively low taxes and decent conditions for entrepreneurs. Out of the 10 areas surveyed by the World Bank, in two cases (ease of conducting cross-border business and obtaining credit) Poland's result makes us one of the world's leaders, in another two (ease of starting a business and access to the media) just behind the leaders, and in the remaining areas (level and ease of tax settlement, obtaining a building permit, property registration, enforcement of contracts and liquidation procedures) definitely above the average. The dynamics of an indicator's changes is as important as the indicator itself. Today, Poland ranks 33<sup>rd</sup> globally in terms of ease of doing business, whilst in the first survey conducted in 2004 it ranked 111<sup>th</sup>. Since then, the indicators in all the surveyed areas have significantly improved, from a 10 per cent increase in the protection of investors' rights to a 126 per cent increase in liquidation procedures. The country, which at the beginning of the 1990s was far behind its Central European rivals, over the past decades has attracted investments worth almost a quarter of a trillion dollars—as much as the Czech Republic and Hungary combined and several times more than Turkey and Romania. On a global scale, in terms of FDI (foreign direct investment), Poland now ranks 25<sup>th</sup>, behind the economic giants (with the USA, China, Great Britain and Germany in the lead) and the largest tax havens, but ahead of all countries that have undergone economic transformation (except Russia) and most of Europe.

The situation looks even better in terms of the number of new investments (greenfield), where Poland has ranked 9<sup>th</sup> in the world in recent years. On the one hand, this result reflects the country's objective economic success, on the other hand, it is a reflection of the investors' assessment of Poland's investment attractiveness in comparison with our rivals. In the attractiveness rankings, Poland is now ranked around 30<sup>th</sup> position (although it is often at the top of industry-specific rankings, e.g. when it comes to opening business services centres). This means that today we have a good position to attract investments and—what is more—we still have a chance to improve it by undertaking effective measures.

### **What attracts investment to Poland**

What attracts investment? The answer depends on which projects we are talking about. A.T. Kearney's research shows that for most investors, access to clients and the macroeconomic environment (i.e. market growth

“

**Today, our gross domestic product (per capita) exceeds 70% of the EU average, while in 2004, when we joined the EU, it did not even exceed half of the EU average.**

**PLN 2,116 billion**

**GDP in 2018 (current prices)**

**over**

**PLN 163 billion**

**the amount of EU subsidies received by Poland during the last 15 years**

and stability) are of key importance, followed by other investment risks (including regulatory risks) and cost factors. In the case of Poland, we usually deal with one of the three types of projects. The first type are projects aimed at the whole European market (or part of it)—this is the nature of most investments in the processing industry. The key factor of attractiveness here is Poland's membership in the European Union (access to the market) combined with cost attractiveness (moderate cost of labour combined with a good education of employees).

The second type of projects is oriented towards meeting the needs of the national market, with typical examples being investments in the banking sector or in trade. The growing purchasing power of the Polish society and the country's significant development potential, resulting from a fast GDP growth rate and macroeconomic stability, are of the greatest importance here. Finally, the third type of projects, very popular in recent years, is investments intended to meet the needs of the whole world (a typical example of which are shared services centres of global concerns). In this case, the attractiveness of Poland results from the availability and reasonable cost of employing highly qualified employees, with simultaneous investment security and a radical drop in technological barriers to cross-border provision of services.

### **Demand for a new strategy**

We must remember, however, that the investment attractiveness of a country is not given once and for all. For years, we have been accustomed to the fact that countries offering significantly lower labour costs and creating appropriate conditions for development automatically gain a competitive advantage in many areas. Successful transformation and EU membership have resulted in our country's rapid economic development, increased prosperity, a sense of economic and political stability and secure access to the most important export markets, with an average much lower than that of Western Europe. However, the continuation of such a development model may no longer be viable for two reasons.

First of all, the times of cheap labour are slowly beginning to become a thing of the past in Poland. On the one hand, we should be happy about it as this is what economic development is all about. On the other hand, the more the cost of labour increases, the easier it is to find investment locations in Europe and worldwide that are more attractive in terms of costs than Poland. The second reason, however, is more important. The world is witnessing the fourth industrial revolution, a new great wave of changes connected with digitisation, production robotization and the use of artificial intelligence. All this may quickly lead to a change in business models of international corporations. According to some estimates, intensive use of industrial robots, with a simultaneous drop in their prices, may reduce labour costs in the German automotive industry by over 40 per cent by 2025. In just a few years' time, a car

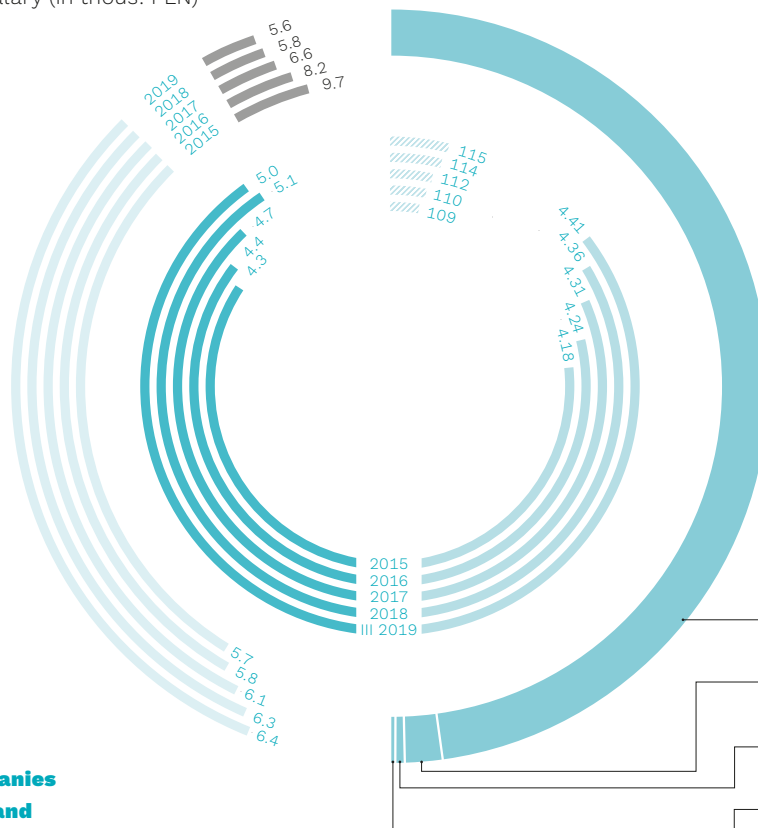
factory in Germany serviced by robots may become more competitive than a factory in Poland operating at the middle technological level, and an autonomous German truck will become cheaper than a truck with a Polish driver behind the steering wheel.

If our country is to maintain its investment attractiveness, it must seek new, clear competitive advantages. For further development, we need investment that creates jobs with high added value, is innovative and uses labour-saving technologies. The most important condition for attracting such investments is proper education of Poles, their ability to absorb new technologies and accept changes. However, it is also necessary to ensure that the quality of life is as high as possible (because people must simply want to live in our country), that state institutions

## COMPANIES IN POLAND

- Average employment in the enterprise sector (in millions of people)
- Unemployment rate (per cent)
- Average salary (in thous. PLN)

- Companies operating in Poland (in millions)
- ▨ Companies operating on territory of Poland per 1,000 inhabitants



**392,7**

**thousand of new companies  
were registered in Poland  
last year**

## COMPANIES ACCORDING TO EMPLOYMENT

- 96.0%** of micro companies (up to 9 employees)
- 3.2%** of small companies (10–49 employees)
- 0.7%** of medium-sized companies (50–249 employees)
- 0.1%** of large companies (over 249 employees)

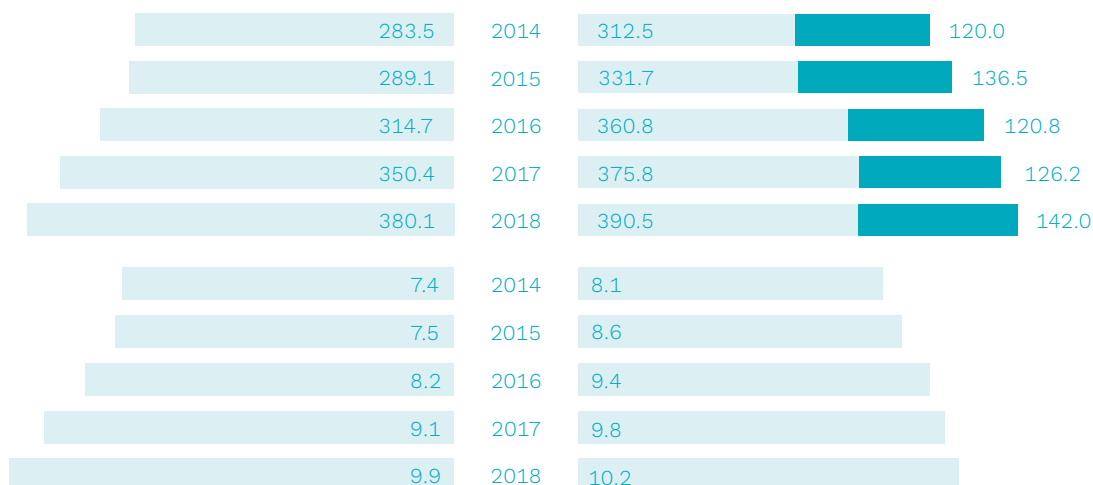
Source: GUS, internal sources.

## STATE BUDGET

Revenues (in billions PLN))

Expenses (in billions PLN)

■ Investment outlays (applicable to economic entities keeping accounting books, with over 49 employees)



Income per capita (in thous. PLN)

Expenditure per capita (in thous. PLN)

operate as efficiently as possible and that the business environment is as good as one can only imagine.

For over a quarter of a century, Poland plagued by high unemployment was looking for investors who would create new, permanent jobs. Today, it must look for those who create jobs with high added value by relying heavily on modern technologies. In other words, investments typical of the fourth industrial revolution. This requires appropriate economic promotion of the country and effective cooperation with potential investors. It also requires skilful use of the existing support instruments and incentives to encourage investment (due to the still lower level of economic development of most regions of Poland when compared with the regions of Western Europe, investors implementing their projects may benefit from government grants, tax exemptions, as well as support instruments co-financed from European funds).

But most of all, it requires actions aimed at making Poland a country where highly qualified people want to live and work, and developing

companies can count on kindness and a friendly environment fostering development.

## **Special role of Polish metropolises**

Polish metropolises should play a key role in such a new strategy of acquiring desired investments because in the times of the fourth industrial revolution the centres for manufacturing goods and services will draw their strength not from cheap labour, but from the proximity of centres of knowledge and culture. They will be located there, where employees will be able to enjoy a high quality of life. The best conditions can be found in the vicinity of large, dynamically developing metropolises.

To what extent are the Polish metropolises ready to face this challenge? According to research that PwC has been conducting for over a dozen years now, membership in the EU has allowed for a huge expansion of their development capital. The quality of urban infrastructure and services has radically improved, as well as the standard of life of their inhabitants, and metropolises have taken intensive measures to strengthen their role as centres of knowledge and culture. They are also better managed today and better equipped to efficiently communicate with their own inhabitants and investors.

Today, metropolises and metropolitan areas are the main centres of Poland's economic development. The 12 cities covered by the PwC survey are inhabited by 6.7 million people, i.e. 18 per cent of the total population of the country, generating 32 per cent of the total GDP. On the other hand, the 12 metropolitan areas around these cities are inhabited by 16.1 million people, i.e. 42 per cent of the total population, generating as much as 55.2 per cent of Poland's GDP. But GDP indicators do not fully reflect the economic importance of metropolitan areas: 76 per cent of all Polish IT companies are located there as well as the overwhelming majority of businesses operating in the area of innovation and new technologies. Metropolises are cultural centres as well as centres of the greatest scientific, artistic and educational activity. The 12 metropolitan areas are inhabited by 55 per cent of the population with university degrees. They are home to 89 out of 100 best academic universities and 84 per cent of all university students study there.

Of course, there is still much to be done. It is necessary to find a recipe for improving the state of the natural environment and we also have to improve the quality of many services (especially health care and education), optimise strategic planning of development with the use of modern smart city solutions, intensify the cooperation of cities with their surroundings and the world of business and science. But the most important thing is that Polish metropolises must clearly define what kind of investments they want to attract. Innovative, technologically advanced and fully exploiting their cultural potential, which combines the historical past with the economic future of Poland.

**The author is the main economic advisor to PwC in Poland and a lecturer at the Vistula Academy of Finance and Business.**

# WE ARE AN IMPORTANT PART OF THE LOCAL ECONOMY

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## **IBM has been present in Poland for many years. Do you like the country on the Vistula River?**

The company operates in many market segments and the business I am in charge of manages IBM Shared Service Centers for our external customers around the world. These are mainly IT projects, we are present in Wrocław, Katowice and, on a smaller scale, also in Warsaw. Altogether, we employ several thousand people, but this is a dynamic number, which is constantly growing. We have been operating in Wrocław for a decade now and in Katowice since 2013. The choice of these locations was a good decision and we appreciate our good cooperation with the authorities of these cities.

## **In Katowice, you probably blazed the trail when it comes to companies from the new technologies sector?**

Maybe it used to be like that, but nowadays the city is developing very dynamically in the direction of new technologies. Now, it's no longer only about heavy industry or mining, but you can also see innovative sectors, which are becoming more and more visible in the city. Today, we are a part of a rapidly changing city, which also focuses on innovation.

## **What were you guided by when choosing these locations?**

We noticed their enormous potential. And the current development of these cities shows that it was the right decision. In our industry, the level of services offered is determined simply by people, so the key is to build an agile team. On the one hand, these are, of course, graduates of Polish universities, or colleges, from economic to technical ones—but we also employ foreigners in our centres. We are not talking about marginal cases here as we have representatives of 90 countries in the Polish team, from the USA or Western European countries, from Ukraine, India or African countries. It is an extremely multinational environment, and this is also the reason why it can respond so efficiently to various challenges, which suits our customers and works perfectly well in practice.

And thanks to the fact that we are open to new problems and challenges, the level of services offered in our centres is growing. When we started our business, we were engaged in quite simple help desk operations, database operations or similar activities in the IT sector. Today, when you can see how well the team is

**“In Poland we cooperate widely with universities, they’re the apple of the eye for us,” says Izabela Olszewska, general manager at IBM Global Services Delivery Centre Poland.**



working, we are increasingly receiving much more advanced projects. We are working on solutions using the latest developments, such as artificial intelligence, blockchain, new possibilities of cloud systems and big data. In addition, the team often comes up with ideas which later, together with IBM programmers from other divisions or companies, are implemented at the customers' and which are also used as a foundation for new services. There will be more and more such examples, because we are still developing strongly.

**How is international recruitment conducted?**

We use many possibilities and, of course, in Poland we widely cooperate with universities, they're the apple of the eye for us. We organize classes taught by our employees. We also focus on maintaining good relations with the local authorities, so we are perceived as a reliable and honest employer. We have a number of internship programs or competitions for students, under the framework of which you can start an internship with us and later many participants of such programs become our employees. Of course, we also recruit outside Poland and in case of such projects the IBM structures prove extremely useful as many of our employees were previously employed by our companies from other countries. The fact that we are a part of an international corporation helps us a lot.

**Have you checked what IBM's contribution to the development of local economies is?**

We have not made such estimates, but I can think of a lot of evidence proving that we are an important part of them. The company is a reliable taxpayer, but it is not only about CIT, our employees also pay PIT. Moreover, with such a number of employees, their expenses on consumption are an important part of the local economy—expenses in shops, rental income, etc. However, I also see our importance much more broadly as we promote employment of people with disabilities, to whom we offer a number of improvements to facilitate their everyday life. We also focus on the employment of women. Despite the seemingly technical nature of our work, women already constitute a large part of our team. We also continue to promote technological professions among young women, which is very important for us.

Moreover, like all our other companies in the world, we have a number of solutions that support mothers in returning to work. These include flexible forms of employment and remote work, but we also promote initiatives that support fathers' involvement in bringing up children. I've had three children myself while working for IBM, so I can confirm that these solutions are very useful for women.

**Is it likely that new IBM service centers will be opened in Poland?**

The existing ones are developing, but they also have limited capacities. On the other hand, the efficiency of employees is growing and they are ready to face new challenges. Therefore, there are no such plans at the moment.

# UNIVERSITIES NURTURE NEW TALENT POOL

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**You have been operating in Poznań since 1993. What were the beginnings of Volkswagen in the capital of Wielkopolska region?**

We started with a company employing 62 people, and now the number of employees exceeds 11 thousand. Today, the daily production reaches 1170 cars and we also make more than 4.5 million castings per year. Since 2014, we have invested heavily in the construction of the factory in Września and now we are investing in the expansion of the plant in Antoninek. In total, in the years 2019-2020, we will have spent approximately EUR 450 million on investments. In Antoninek, we have already built a logistics hall with an area of approximately 46,000 sqm and we have also invested in the expansion of the welding shop hall, where 450 robots are currently being installed. As a result, the level of automation will increase significantly. All these investments are to prepare us for the production of a new car.

**When will the new model become available?**

Volkswagen Caddy has been manufactured for 16 years now. Of course, there are plans for the future, but I cannot reveal more details at the moment.

**How do you assess the impact of the new factory in Września on the surroundings of the plant? What was the significance of its construction for strengthening the economic attractiveness of the region?**

Since 2014, when we started our investment in Września, we have spent a total of PLN 4 billion. Currently, we employ 3.4 thousand people in this factory and produce 420 cars a day, including the MAN e-TGE electric van. When we started construction, the unemployment rate in the Wrzesiński powiat amounted to 13-14 percent and now it has dropped to 3.6 percent. I do not claim that it is solely due to the Volkswagen's factory, but our investment has certainly contributed to it. Moreover, the construction of the factory attracted other suppliers, such as Sitech, Benteler or Gestamp. Although this third company had already appeared earlier in the region as a supplier of components for Caddy, it is launching another production line near our plant in Września. Overall, our investment has contributed to the improvement of the economic situation of both the city and the municipality of Września.

**“One of the key advantages of Poznań and its surroundings is the high potential of employees despite the relatively low unemployment rate,” says Jens Ocksen, President of Volkswagen Poznań.**



**A barrier to further development of the automotive industry in Poland is the difficulty in recruiting new employees and rising labour costs. How does VW Poznań cope with this?**

We are in a good situation in this respect. We managed to complete the workforce for the third shift in Września without any major problems and we recruited Polish employees. It's the same at practically all of our sites, which proves that we are still an attractive employer. Of course, we can see a tendency to increase employees' salaries in CEE countries. This makes automation in some production areas profitable. In September, for example, the level of automation at the welding plant will reach 80%. We will also be approaching the same level of automation at the welding plant in Antoninek. The advantage is that thanks to good cooperation with the Poznań University of Technology we can gain highly qualified employees.

**Speaking of this cooperation: what does it look like and what are its results?**

This is not just a collaboration with universities. We have patronage classes in two schools, educating young people in five professions. Every year they produce 80 graduates and, altogether, almost half a thousand people have completed these specialized courses. As far as universities are concerned, our qualifications system is based on the so-called dual study, thanks to which our graduates study at the university of technology and at the same time obtain their professional education while working for Volkswagen Poznań. As a result, at the end of their studies, they have a two-field diploma, i.e. together with a certificate of the Polish-German Chamber of Commerce and Industry. Last year, together with the Poznań University of Technology, we prepared a large project under the framework of which a group of about 30 students from various faculties constructed a racing car. Some of these people have found employment with us in the technical development department.

**How do you assess the attractiveness of Wielkopolska region for automotive investments? What is the region's advantage and what are the barriers?**

One of the key advantages is the high potential of employees despite the relatively low unemployment rate. Another is the developing infrastructure: there is a motorway to Germany, which makes our transport more efficient. We have 112 suppliers from all over Poland, including 17 from Wielkopolska. Eight of these companies are based in a supplier park in Września and seven in Swarzędz. This shows how big the investment increases the attractiveness of the region and attracts more companies.

**Automotive companies are focused on the construction of electric vehicles. Such a car is already under construction in Września, will it be manufactured in Antoninek?**

We want our vehicles and services to make mobility cleaner, safer and more efficient. As a manufacturer of light commercial vehicles, we can influence the shape of urban logistics. Together with our customers, we are striving for zero emissions.



# WE ARE OPTIMISTIC ABOUT THE FUTURE

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## **How important is the role of Polish investments in the Whirlpool group?**

What we have done in Poland in recent years shows that it is one of our strategic markets. Only in the last three years, we have invested PLN 1.3 billion in Poland, and the merger and integration of companies previously operating within Indesit Polska and Whirlpool Polska was very advanced and challenging.

Now we are entering a new stage. In the tumble dryer factory opened at the end of 2018, we want to produce even more than 1 million pieces of equipment a year. This is the only plant of this type in the whole region, which shows Poland's importance is in the group's strategy. This plant alone cost almost PLN 200 million and it is not just about production. We have prepared a completely new concept of this type of equipment, meticulously developed also with a significant participation of the Polish team. Our investments don't end with Lodz, though. We are developing a production line of dishwashers in Radomsko and in Wroclaw we are focusing on the refrigeration sector. Let me emphasize again that it was an extremely complicated operation, so now we need time to be able to take advantage of the achieved outcomes.

## **Does it mean that there are no plans for further investments?**

Whirlpool in Poland is developing all the time, the product life cycle lasts several years, so before we start thinking about new products, let's use the ones already developed. Especially that, trying to meet the production-related needs in Poland, new concepts of equipment have been developed, including not only the visual aspect but also the functional one. Now, this equipment will only begin to be marketed, first in France and Great Britain, then in Poland, Russia and other countries.

## **Whirlpool in Poland is not only a factory, but also a strong R&D division.**

This is an extremely important sector of our business activity and the Polish centre does not only work for domestic plants, but it also develops concepts that are then implemented across our plants all over the world. In total, we are talking about a team of around 300 people who develop new products and modernize those already produced.

## **Does it employ mostly people from Poland?**

Yes, but it's a very international environment, we have employees

**“Poland is one of our strategic markets,” says Fabio Pommella, President of Whirlpool Company Polska.**



from all over the world. It is a part of an international corporation, which produces the largest amount of household appliances in the world. We also have a financial Shared Services Centre in Lodz, which serves the entire EMEA region, i.e. Europe, the Middle East and Africa. It is also an international project.

**Taking into consideration the low unemployment rate, is there a problem with finding people willing to work in factories?**

There's no way we can ignore the macroeconomic realia, so finding workforce is really challenging, especially in Lodz. Due to the high density of plants around the city, as well as other companies operating in our industry, we have to compete for an employee. Staff turnover is also a challenge, because each new person is an effort for us as we need to devote time to training. When, after a few months, such a freshly trained employee resigns to go to another plant, it is an additional loss and cost for us. In Radomsko, on the other hand, there is another problem as there are big cities in the vicinity and their residents rather do not want to move to Radomsko with a view to work there. That's why we put a lot of effort into initiatives aimed at encouraging people to choose our plants for employment—also the one in Radomsko. In Wroclaw the problem is smaller.

**Are you also looking for staff abroad?**

Of course, today, opening up for people from Ukraine, for example, is an absolute market necessity. We are already thinking about new directions and conducting analyses of how to start employing people from Asia, these processes have not started yet, but they are being analysed.

**Are good relations with local authorities helpful?**

Definitely, and our relations with the authorities of the cities in which we are present, as well as with the economic zone, are excellent. This is our conscious approach: we decided to start our business in a certain region in order to stay there for a long time. We want to be a part of the local community and therefore we are willing to get involved in various initiatives and events, thinking not only about our employees, but also, more broadly, about the whole local community.

**Do you also cooperate with educational institutions?**

Yes, because through such cooperation we can participate in some way in the training of our future engineering staff as well as the lower level employees. We cooperate with one high school in Radomsko and technical universities in Lodz and Wroclaw. We have high hopes related to such projects, although they are definitely more forward-looking initiatives.

**How do you assess the prospects of the Polish market?**

We are very optimistic about the future and expect the market to grow this year. This is a result of both the good economic situation and many social projects aimed at improving the housing conditions of Poles. As a result, the funds allocated to the market will certainly affect the market situation, also in the household appliances sector.

# COLLABORATION OF SCIENCE AND BUSINESS IS THE KEY TO SUCCESS

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**Berlin has gained a reputation as a new-business boomtown. Is that true? If so, which industries are especially innovative?**

That's right. Today we can say that Berlin is one of the engines of Germany's economic growth. Our city is developing both economy-as well as population-wise. Berlin is booming and every year it attracts around 40,000 people who want to live and work here. Everything connected with digitisation is at the top of our agenda. Digitisation is an area that permeates all other sectors. We have always relied on cooperation of science and research on the one hand and the economy and businesses on the other hand. This is our recipe for success and we can see impressive creativity developing in this area. This is also the reason why, as head of the city, I have also become responsible for science, research and universities.

**What is the best way to attract investors? What are your strategies? Which strategy worked and which turned out to be ineffective for Berlin?**

Money alone is not the solution. Of course, we also offer financial incentives. But the most important thing is to promote business and investment in a comprehensive way. If a company that wants to come to Berlin has problems with plots of land or administration, we offer quick, comprehensive solutions. The main factor determining the international success of Berlin is the liberal and tolerant climate of the German capital. Moreover, our city is also exciting as a German cultural metropolis. It is easier for companies to bring rare and sought-after specialists to Berlin than to any other German city.

**Which cities would you point as role models? Why?**

I do not think that other cities could be mentioned as direct role models in this regard. I am also the President of the largest global network of cities—Metropolis uniting almost 140 cities around the world. My basic experience is that, while we can learn a lot from each other, we rarely adopt ready solutions

**“Berlin is the capital of start-ups. It is in them that we see our future,” says Mayor of Berlin Michael Müller.**



from others. Berlin, for example, as a formerly divided city, has its own history of a 'freedom city' as we put it. No other city in the world has such a history. But it is also clear that we are aware that there is still room for improvement. In many ways, we are still far behind metropolises such as London, Rome and Paris. But we still want to catch up with them.

**What are the most preferable investment sectors? Why?**

Berlin is the capital of start-ups. It is in them that we see our future. We need new companies in new industries. The boom in Berlin has been very dynamic in recent years. And the situation after 1945 was determined by the fact that important company headquarters or large banks had left Berlin. As far as the economic policy is concerned, the cake was split in Germany after the fall of the wall when we had the chance for a new opening. So we had to discover something new that didn't exist elsewhere. That is why we are now focusing on digitisation, and one of the most recent great successes is the 600 million-worth investment by Siemens.

**What are the most important megatrends changing big cities?**

The future of humanity is connected with the big cities. This applies not only to Europe, but also to other continents. It is about increasing the number of people and securing the resources needed for life, such as housing, energy and water, but above all it is about managing traffic in these agglomerations and, in connection with this, about controlling air pollution.

**What is the role of the city in improving the quality of life?**

The main task that cities and their administration face is to make living conditions attractive. A metropolis must also be a place worth living in. For me, social cohesion and the promotion of volunteering are priorities in Berlin. These are also the main forms of civic involvement of individuals in civil society. This is a task which can only be carried out close to people, i.e. at urban or local level.

**What is the biggest challenge for a mayor?**

The biggest challenge is to constantly bring together people with divergent political views and to find common ground between the interests of various associations so that all together can ultimately cooperate in the interests of citizens. This is the purpose of our work when we are at the head of a metropolis as big as Berlin, which is growing steadily.

# TEN MINUTES TO THE CITY CENTER

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**Brussels is the capital of the EU and the seat of the EU institutions. Sometimes we forget that it is also a city with its inhabitants. Is it more difficult to manage such a place?**

We've decided to turn it into our advantage. We are the capital of Europeans, one of the most cosmopolitan cities in the world with 184 nationalities living side by side and working together here in Brussels. It is unprecedented that a city of 1.2 million people is so well-known in the world, because it makes decisions regarding 70% of the EU's legislation. We are now the second most cosmopolitan place in the world, after Dubai, but before London, Paris and New York. There are 50-60 thousand EU officials, one thousand foreign media correspondents, 15 thousand lobbyists and over 10 thousand international organizations in Brussels. Yet, apart from that Brussels is simply a normal city at this great crossroads of cultures.

**European cities are facing an important moment of change today. We need to make them more friendly for the residents, but at the same time they have to attract business. How does Brussels cope with it?**

Firstly, Brussels is a complex of interconnected quarters. There is no single centre, there are many. We have a rule that there must be a nursery, a school, a cultural centre, public transport, shops and a green area within a 10-15 minute walking radius. Secondly, as I said, we are an international city. And on this basis we are building our image as a congress centre. We are the second, after Singapore, largest congress centre in the world. We spend hundreds of millions of euros to renovate and build new hotels, congress and exhibition centers, also on the premises of Brussels Expo (world exhibitions area from 1935 and 1958, where the famous Atomium is located—ed.). But we are also changing the centre of our city, creating new museums and new tourist attractions.

**I have lived in Brussels for many years and I have always had the impression that it was a big city with the atmosphere of a small city. Is this just the way it is or is it a conscious policy?**

In Brussels you can be in a rich neighbourhood and then walk half a kilometre to find yourself in a poorer neighbourhood. But the atmosphere doesn't change, it's always a city with a neighbourly

**“Brussels was a utility city. You worked here and slept somewhere else. It's different now,” says Philippe Close, Mayor of Brussels.**

atmosphere, where people say good morning to each other. As a result, Brussels is a city that is neither too big nor too small. With big ambitions, but on a human scale. It's not a city that is too expensive to live in. This is exactly this simplicity that we care about very much, while at the same time we strive to fulfil our ambitions.

**Are rich people moving out of the city?**

We are dealing with two parallel phenomena. We can see a middle class that left the city in the 1990s and is now returning to the city centre. But at the same time there are those who are moving to the suburbs. Our suburbs are rich, not like in Paris, where poverty is being pushed out. There is poverty in the city, but at the same time there is extreme wealth in the city centre. Our strength is diversity. I prefer such a mix to ghetto quarters, whether rich or poor.

**And what do you do to prevent ghettos from being formed?**

If the neighbourhood is getting too poor, we try to bring the middle class to move there, using various incentives. If it becomes too rich, we put social housing there. There is not a single monolithic quarter inhabited by a single type of community in Brussels.

**I can see more and more bus lanes in Brussels, more and more bicycles, more scooters, more shared cars. Is it chaos or is there some general plan?**

Our plan is to introduce a hierarchy of means of transport. We promote getting around on foot, then using bicycles, public transport and private cars. And we focus on huge investments in public transport amounting to more than EUR 5 billion. This is absolutely at the top of our agenda. If we want people to switch from their private cars to public transport, they must have more opportunities, and public transport must be faster. We are not against cars, but we are saying that they are not a priority. Change is already underway, 40% of Brussels citizens do not have a car. At the same time, we need to create a city offering smart transport, where an identity document, a credit card or any other card will let you use all means of transport.

**It's a big change. Because for decades Brussels was a city of cars, even if only because of the impressive tunnels surrounding the city centre.**

It was a utility town. You worked here and slept somewhere else. And that's why a motorway was built in the city. But those times are over.

**You are creating a pedestrian zone in the centre of Brussels. This raises protests, even from the side of the trade industry.**

I do not know a single pedestrian zone in big cities, which wouldn't be controversial. It is complicated, but there are certain things we cannot put off. Firstly, it's about limiting air pollution. Secondly, sometimes it takes political courage to move forward.



# LEAVING NO ONE BEHIND

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**You head the Executive Committee of the Global Parliament of Mayors. From this perspective, what is the most important problem for modern city authorities?**

The Global Parliament of Mayors is a movement of Mayors from different countries. It is obvious that Mayors from very different regions face individual challenges. However, I believe that there is one question every Mayor has to deal with: how to organize transformation? We have to cope with transformation caused by digitalization, we need a tremendous ecological transformation in order to reduce CO2 emission and avoid putting too much strain on our planet. At the same time, we have to assure social cohesion and strive for reducing spatial inequality. Keeping that in mind, the main approach of GPM is to empower Mayors and their cities by advocating allocation of adequate financial resources, competencies and a redefined role of cities in the global arena.

**Why is cooperation between mayors so important?**

Although it has already been said, cooperation between Mayors and cities is an important source of knowledge and a valuable instrument for peer-learning. Innovation cycles are getting shorter and shorter. The same is true for the time that cities have to adapt to new challenges. Let's take the example of mobility: at the same time we are facing bad air quality in cities, growing urbanisation as well as new opportunities coming from digitalization and new transport modes, such as e-scooters. We can adopt new solutions much faster and—what is even more important—avoid making mistakes if we as Mayors learn from each other's experience. That's why European and international city networks, like EUROCITIES or ICLEI, are so important. We do not have to reinvent the wheel in every city.

**Benjamin Barber told me once: "Cities can be champions of progressivism, tolerance, inclusion and measures to limit climate change even if national governments become obstructive and reactionary". Would you agree?**

Yes, they can! And they demonstrate it on a daily basis. Local governments worldwide, regardless of the size of the city or the political affiliation of the Mayor, have a more non-partisan

**"Local governments worldwide have a more non-partisan and pragmatic approach to governing than the central government," says Peter Kurz, Mayor of Mannheim.**





pragmatic, solution-oriented approach to governing. Let me give you a specific example: the national migration policy often does not reflect the local situation. As Mayors we have to deal with all the city inhabitants, regardless of the legal status of a given person. If we leave people for a month or even for years with an unsettled legal status, for example because an asylum procedure hasn't come to an end, the local community will have to pay the price of missed integration. That's why we postulated in our 'Mannheim Manifesto', which we presented at the Habitat III conference in Quito that "Cities need the right to assign urban citizenship to all residents regardless of their status. Residence in the city should confer full membership and rights."

### **How do you understand inclusive growth?**

Inclusive growth lies at the very heart of the UN Sustainable Development Goals and the New Urban Agenda. It is brilliantly described with the terms "leaving no one behind" and "leaving no place behind".

To achieve these goals a multitude of measures have to be taken at the same time and on different political levels. Breaking silos within organizations such as a local authority but also defining new modes of governance is essential. In our mission statement "Mannheim 2030" we defined as a goal that "Mannheim guarantees educational equality and prevents poverty. The social and cultural integration of all Mannheim residents is guaranteed."

In order to facilitate inclusive growth, Mayors of many cities have to pay particular attention to the 'arrival districts' in cities, as they are the most vulnerable areas. Interventions must take place on a micro-level (even a single 'problematic property' can affect a whole quarter) and need to be quick and coordinated.

# COMPANIES OPERATE MORE EFFICIENTLY IN AGGLOMMERATIONS

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**Although a lot has been said about the need for deglomeration in Poland recently, it seems that the Polish economy is quite balanced in the spatial sense. We don't have one very strong centre, but a lot of quite strong ones. What does the situation look like elsewhere?**

Generally speaking, globally we can see tendencies to shift activity towards very large cities. The UN estimates that 55 per cent of people live in urban areas today, compared to 30 per cent in 1950. It predicts that this figure will reach 68 per cent by 2050. This will be accompanied by a further increase in the so-called megacities with more than 10 million inhabitants. Currently, there are 33 of them in the world, and by 2030, according to the UN, another 10 will have appeared globally. However, within the borders of the country, cities often follow the pattern of the so-called Zipf distribution. For example, New York City has just over 8.6 million inhabitants, Los Angeles has about 4 million inhabitants, Chicago 2.7 million, and Houston 2.3 million. In Poland, this regularity is disturbed by Lodz.

**Is the development of large cities taking place at the expense of villages and smaller towns a positive phenomenon from the economic point of view?**

It certainly helps achieve higher productivity. Companies in larger agglomerations are more productive. First of all, the bigger the city, the more potential employees, so it is easier to find an employee who is ideally suited to the needs of the company. Secondly, the size of the city is also important for the flow of knowledge between employees from different companies, as well as for the availability of subcontractors, sub-suppliers, business services, etc. Metropolises therefore facilitate cooperation between companies for the benefit of all parties involved. Thirdly, cities create a particularly good environment for the most innovative companies, for which human capital, flow of information and ideas from other industries and other companies are important.

**Large cities have disadvantages, e.g. higher property prices or labour costs. Moreover, they are often congested and polluted.**

**“A well-managed city may prosper even with many millions of inhabitants,” says Beata Javorcik, professor at Oxford University, Chief Economist at the European Bank for Reconstruction and Development since September this year.**

**Isn't it so that at some point the price of metropolis growth starts to outweigh its benefits?**

It may be so, but it is impossible to say what city size is optimal. A well-managed city with good infrastructure can prosper with many millions of inhabitants. What's important is not only the infrastructure within the city itself, but also the external infrastructure. In a way, the size of cities in a given country depends on central politics.

**In this context, is the deglomeration proposed by some representatives of the Polish government a good idea?**

First of all, it is not clear to me whether it is possible to effectively oppose the agglomeration forces. Of course, one may wonder how to help smaller towns, which are becoming depopulated, which causes various problems. However, we must remember that the consequences of various instruments are not fully predictable. Let us assume that we are introducing a very fast railway connection between Warsaw and Kraków. On the one hand, some companies might think that rents in Warsaw are too high and move to Kraków. But on the other hand, residents of Kraków could want to commute to work in Warsaw.

**Let's change the subject a little bit. Should local governments choose the industries they want to see developed? Should they execute some economic policy, or should they rely on market forces and accept all willing investors?**

It is often so that the development of a particular industry in a given place is not the result of a conscious policy of the authorities. The location of technological clusters, such as the Silicon Valley and Road 128 in Boston, is dictated by the excellent universities that are there. Adopting a policy aimed at the development of an industry chosen by the authorities is risky. Cities should rather promote themselves as a good place for a specific type of activity, e.g. provision of services, conducting research, etc. This type of support for the development of selected industries is safe, because the costs of a possible mistake are small.

**How should cities build their investment attractiveness if tax breaks are a bad idea?**

First of all by developing the infrastructure in such a way so as to eliminate traffic jams in the city, so that it can be reached by different means of transport. Also the telecommunication infrastructure plays an important role. The quality of life in the city is another crucial aspect. Both entrepreneurs and employees want to settle in clean, green areas with a wide range of leisure activities. It is also worth promoting the city by disseminating information important for investors. A good information policy is relatively cheap and can be very effective.

**Is it possible for cities to cooperate in attracting investments?**

Certainly, cities cannot compete for investors with taxes. This is a harmful practice, which causes that companies start to expect reliefs throughout the country. Cities should agree that they will not compete in this way, however they can cooperate in the development of infrastructure.



# THE OFFICE MARKET IN FULL SWING

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**The available office space in Warsaw reached almost 5.5 million sqm at the end of March while in eight other large agglomerations it reached 5.2 million sqm in total. The most attractive office buildings find a set of tenants before they are put into use. How long will this go on?**

The office market is developing so fast that the available resources will exceed 12 million sqm in the next two years. Such a perspective results from the good economic situation, but also from the position achieved by Poland on the market of service centres. Currently, there are about 1.24 thousand centres employing 280 thousand people with annual growth of about ten percent. On a global scale, further growth of the BPO market is forecast to reach about 11 per cent by 2023, while changing its character to provide more specialized services with automation of repetitive services.

Poland is well prepared for this. The processes that are currently being implemented are more and more often tasks using advanced technologies and at the same time, one can still find urban centres with academic facilities providing highly qualified employees at relatively lower costs in relation to Western Europe.

**The regions have almost caught up with Warsaw in terms of available office space, in Kraków and Wrocław it is over 1 million sqm while Szczecin and Lublin with resources of 0.2 million sqm are at the other extreme. Which markets have the greatest growth potential? How do these smaller cities attract companies and developers?**

No other country in Europe has such a large number of steadily growing regional office markets. Today, not only Kraków and Wrocław, but also Tri-City, Poznań, Łódź and Katowice are recognized markets. We owe this development, on the one hand, to the economic strength of individual cities and, on the other hand, to a large academic base.

New services transferred to Poland increase the demand for qualified employees. Due to noticeable problems with finding employees on the main markets, other smaller cities with an

**“Poland’s main advantages in terms of locating investments are its good location, a very good economic situation and a competitive labour market,” says Charles Taylor, managing partner in the Polish branch of Cushman & Wakefield.**

academic base are starting to attract tenants' attention. And developers are following their interests.

Today, for large corporate tenants, when considering several locations, very often the speed of delivery of space plays the crucial role. Attracting one or two large tenants to a given market usually results in its accelerated development. Today, Szczecin and Lublin are in the center of corporate tenants' interest and other cities popular among tenants are Rzeszow or Białystok.

**The warehouse space market in Poland is developing very fast. At the end of March, the available warehouse space increased to 16.3 million sqm, which means a growth of 17% year-on-year. How do you assess the perspectives for this sector?**

In Europe we can observe a gradual shift of the logistic hub from Germany to Poland, which is currently the market leader in Central and Eastern Europe with over 50% share in resources. Dynamic development of e-commerce remains the driving force on this market. Poland's main attributes in the context of locating investments are: a good location enabling cross-border logistics, a very good economic situation due to high consumption, a competitive labour market and further development of transport infrastructure enabling the development of completely new locations.

Labour costs are more than three times lower than in Germany and still significantly lower than in the Czech Republic or Slovakia. Lease costs are lower than in the Czech Republic, Romania, Slovakia and Hungary. An additional advantage of the Polish market is the unwavering interest of tenants, which translates into high activity of developers. The investment process in Poland lasts from 6 to 12 months and is the shortest in the region.

**Commercial properties are popular with foreign investors. In 2018 a record was set—transactions amounting to 7.2 billion euro were concluded. What is the secret of the attractiveness of assets in Poland in comparison with the markets of our region and Western European countries?**

Transactions in Poland accounted for over 55% of the total value of transactions in Central and Eastern Europe, which proves the high liquidity of the market. Capitalization rates in Poland are still more attractive than in the West and allow investors to generate higher returns with a relatively low risk. Macroeconomic factors combined with a strong GDP growth will drive tenant demand and play a key role in attracting capital. At the same time, the fact that Poland is now considered to be one of the developed countries according to FTSE Russell proves its strong economic foundations and will allow to further boost the interest of global capital.





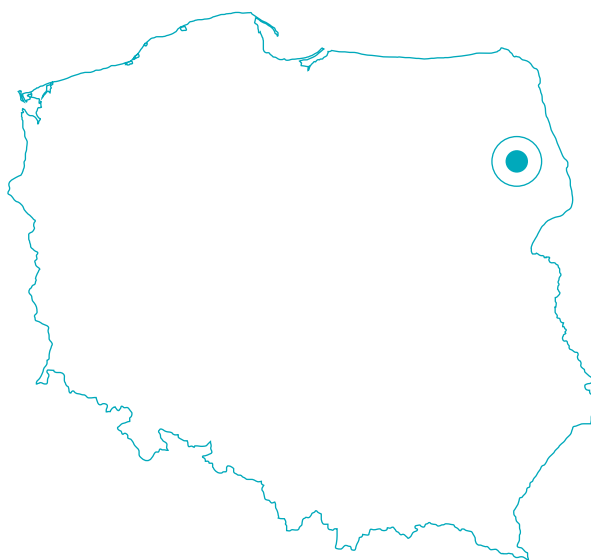
**CITIES**

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# BIAŁYSTOK

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Voivodeship	Podlaskie
Mayor	Tadeusz Truskolaski
Area	102 sqm
Population density	2,911 people per sqm
Population	297,459
Granting urban rights	27.07.1691

## CONTACT DETAILS

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# GREEN MEANS MODERN

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## **TADEUSZ TRUSKOLASKI, MAYOR OF BIAŁYSTOK**

People are attracted to Białystok by good living conditions and investors will appreciate its modern internal infrastructure and no traffic jams. Until recently, the barrier for investors could have been poor access to Warsaw, but that's a thing of the past now. And soon the accessibility of Białystok will be even better thanks to the construction of Via Carpatia. We are particularly interested in the development of environmentally friendly companies and we also focus on the development of the IT industry.

## **MARCIN JOKA, CEO, PHOTON ENTERTAINMENT**

Białystok is a city of ambitious people who are hungry for success. Over the last years, an atmosphere of local cooperation and mutual support in the implementation of unique initiatives has developed in Białystok. Although Białystok has a much smaller area and population than the largest Polish cities, it has an infrastructure that enables good standard of life and is conducive to doing business.



## **MAREK SIERGIEJ, PRESIDENT OF PROMOTECH**

Why Białystok? Because it is a dynamically developing city, full of young, well-educated and creative people well prepared for work. A good road structure in the city itself and good communication with Warsaw, cultural infrastructure plus good schools for children—all these factors make Białystok a city good for both working as well as relaxing.

## **DOROTA JAGODZIŃSKA, MANAGING DIRECTOR, PANATTONI EUROPE**

Białystok is the most dynamically developing city in the Podlasie region. Dynamic growth of the e-commerce sector and the development of infrastructure in Poland have made this region attractive for many investors from Poland and abroad. After the S19 road (Via Carpatia), running through the main cities of Eastern Poland, has been completed, Białystok will become an important industrial centre not only in Podlasie.



In terms of GDP growth, Białystok has not been one of the fastest growing Polish cities in the last dozen years or so. This shows very clearly that GDP is too narrow a measure to illustrate the real development. The city has an optimal size: it is large enough to provide a rich cultural and recreational offer, but also small enough to move around easily. The above mentioned advantages combined with an attractive neighbourhood attract new residents. And a favourable demographic situation is one of the factors encouraging investment.

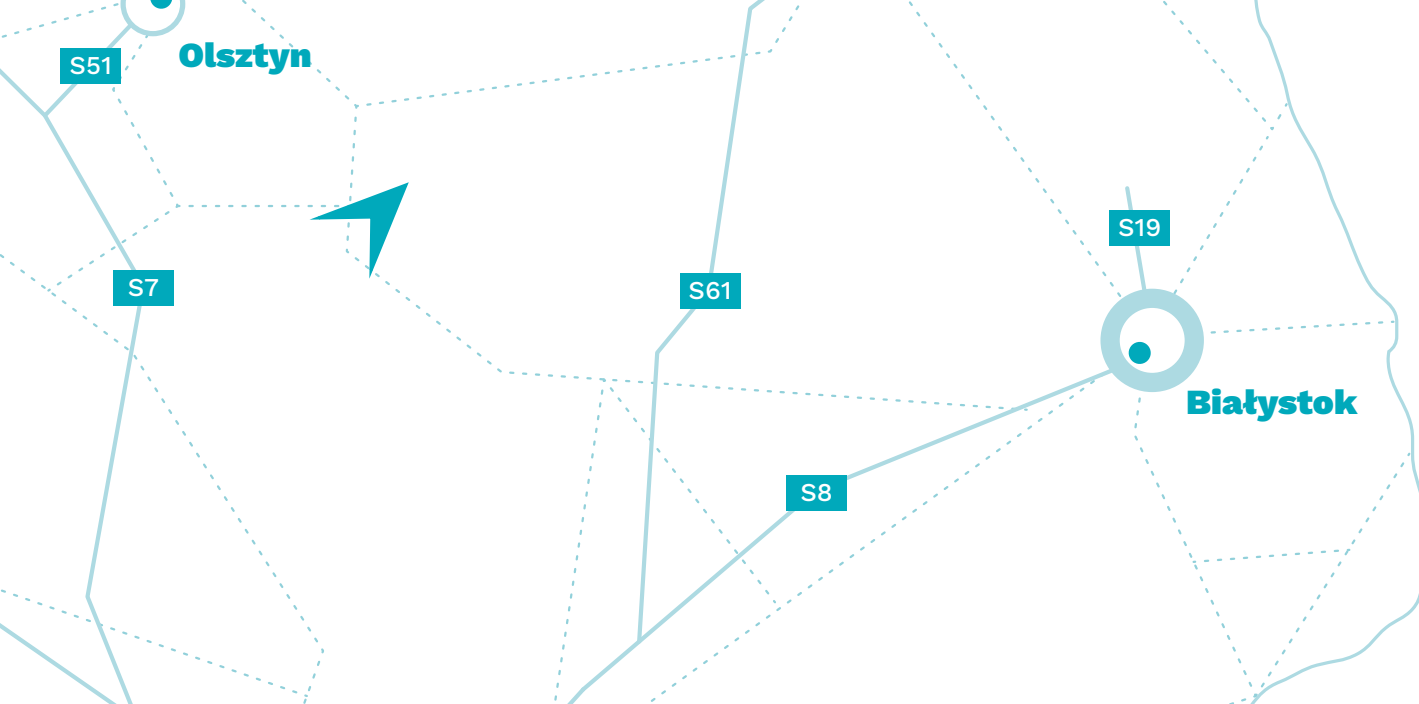
Today, Białystok has a population of about 297.5 thousand people. What is important for employers, the city is relatively young. In 2018, the share of people at working age was 61.1%, compared to 60.6% countrywide. In contrast to many other cities, Białystok still has reserves on the labour market. The registered unemployment rate amounted to 6.1% in April 2019 compared to 5.6%, which is the Polish average. The quality of human capital is ensured by three public universities (Białystok University of Technology, University of Białystok, Medical University of Białystok) and a number of private universities. Although Podlasie enjoys the image of an agricultural region, which also influences the perception of Białystok, the branch structure of the local economy is diversified.

Among other things, the electromechanical and electro technical industry, food processing and alcohol production are developing here. The city also attracts more and more companies providing services for business, including the IT industry. The largest companies in Białystok with foreign capital include Standard Motor Poland (production of automotive components), Nibe Biawar (production of heating devices), Rosti (plastic products) or Asahi (owner of Kompania Piwowarska, which owns the Dojlidy brewery in Białystok).

Recent years have brought a dynamic development of the business services sector. The ABSL industry organization estimates that in terms of employment growth dynamics in this sector, Białystok ranked second in 2018 among 17 Polish metropolises.

“Białystok is a very business friendly city with a huge potential, sometimes invisible and underestimated from the outside. From the point of view of the IT industry, the availability of potential employees is crucial. It is a comfortable place to live on a European level,” says Konrad Świrski, President of Transition Technologies, an IT company which has had an office in Białystok since 2008 and today employs 250 people. “Białystok is the most dynamically developing city in the region. We are glad to be a part of this dynamic process and we know that there are great conditions for business here,” adds Krzysztof Granicki, President of Pilkington IGP in Poland, which has been present in the capital of Podlasie region since 1991.

**The capital city of Podlasie, promoting itself with the slogan “Rising Białystok”, has already outgrown it. It’s a dynamic city with robustly developing modern branches of industry and the business services sector.**



383.8 km

hard surface public roads

## GATE TO THE EUROPEAN UNION

The key road route important for Białystok is the S8 route leading to Warsaw (which you can reach in 2 hours by car). It is a part of the E67 route connecting Helsinki with Warsaw and Prague. Also the national road 19, connecting three agglomerations of Eastern Poland (Białystok, Lublin and Rzeszów), runs through the city. Ultimately, it will be a part of the Via Carpatia route. The capital city of Podlasie is also an important railway junction. The railway line from Helsinki to Warsaw and further to Berlin goes through Białystok. Ultimately—upon completing its modernization—it will be known as Rail Baltic, which is to increase the travel speed to 160 km/h.

In Białystok there is an airport (Krywlany), which until now has been used only for sport. In autumn 2018, the construction of a runway was completed there, thanks to which—after obtaining the necessary certificates—the airport will be able to handle passenger airplanes carrying up to 50 people. “Access from Białystok to Warsaw is so good today that the lack of a cargo airport is not a problem. A port serving passenger traffic will be useful for business,” says Piotr Sosnowski, President of SMP Poland, which has been operating in Białystok since 2006.

- motorways and expressways
- - - railways
- ↗ airport
- railway station

“**Completion of S8 in 2018 radically improved access Białystok, which translated into a significant increase in investors’ interest,” says Tomasz Buczek, Director of Strategy and Development Department at the City Hall**

## NOT A CITY FOR SOLO PLAYERS

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The Economic Council operating at the President of the city is composed in the current term of office of 63 experts from the world of business and science. The council makes sure that Białystok is a friendly place for companies. In the City Hall, there is also an Investor Service Office within the structure of the Department for Strategy and Development, which supports entrepreneurs at all stages of investment. BOI not only prepares individual offers for companies interested in doing business in Białystok, but also actively seeks such companies, e.g. by participating in various fairs and organizing study visits. Its activity is growing rapidly. In 2018 the Office established contacts with 91 investors from 17 countries, compared to 68 on average in the previous three years. The Podlasie Regional Development Foundation based in Białystok also provides support for enterprises in the whole Podlasie region. The PFRD provides entrepreneurs not only information about subsidies, but also offers loans and guarantees.

Since 2008 there has been a subzone of the Suwałki Special Economic Zone in Białystok, where one can conduct business activity on preferential terms. Investors can count on CIT relief of up to 70% and exemption from property tax. According to the new regulations, since 2018 all investment areas in the city have been covered by investment tax reliefs. In the vicinity of the subzone we can find the Białystok Science and Technology Park, whose mission is to incubate start-ups, support the already established companies conducting innovative activities and help in commercialization of scientific research results. BPNT performs these tasks, among others, by renting office, service, technological and laboratory space as well as conference and exhibition space on preferential terms, and also by offering consulting, legal and accounting services and training. Almost 70 entities operate in two buildings of this complex (office and laboratory). In the capital of Podlasie there are also Academic Business Incubators.

Collaboration of enterprises in Białystok and their cooperation with institutions from the business environment and universities is facilitated by clusters: existing since 2007. The Metalworking Cluster unites companies from the metal-machinery industry, which is very important for the city and there are also the Eastern Construction Cluster and the Infotech Technology Cluster, representing the IT industry, which is flourishing in Białystok. Apart from IT also the medical, bio-technology, automotive and machinery sectors are very active in the city.

**From a business perspective, communicative and flexible officials open to entrepreneurs' needs are even more important than a formalised network of institutions supporting investors. However, this network is also extensive in Białystok.**

## MAGNET FOR EMPLOYEES

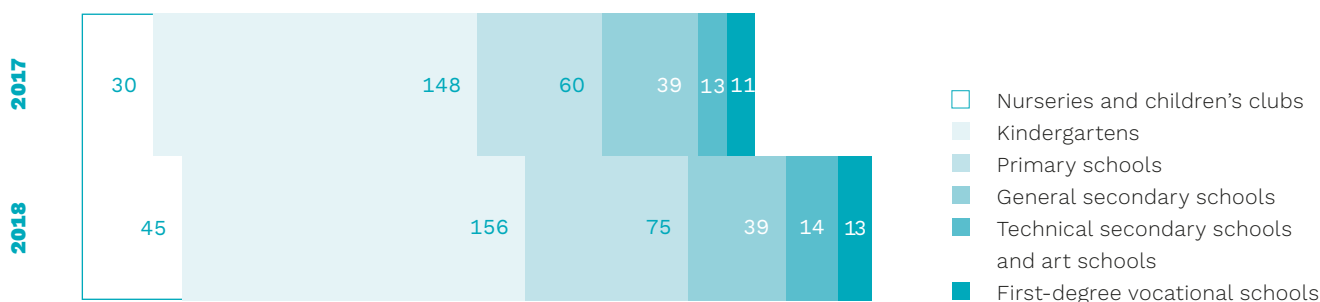
According to the European Commission data, almost half of industrial enterprises in Poland consider the shortage of workers as a significant barrier to development. This percentage is higher only in few EU countries. The situation looks similar in the construction industry, and in the services industry every fourth company reports a shortage of labour. Compared to the general situation, Białystok is an oasis where recruitment of employees, including specialists, is easier. It may be proved by the fact that in 2018 employment in the enterprise sector both in Białystok and in the whole voivodeship grew faster than the country's average, and companies do not have to look for employees abroad.

There are 10 higher education institutions in the capital of Podlasie region, including three public ones. In total, they are educating over 26 thousand students, and the number of graduates exceeds 8 thousand a year. "Young people from Białystok often go to study in larger cities, but our universities are very attractive for people from smaller towns in Podlasie," explains Tadeusz Truskolaski, Mayor of Białystok. "Białystok, as the only big city in the region, is a magnet attracting people from all over the region. Its population is growing slowly but steadily," he adds.

Public universities operating in the capital of Podlasie include the Medical University, the University of Białystok and the Technical University of Białystok. All three declare their openness to cooperation with business, both in terms of personnel training and research projects. The technology transfer centres, which operate at each of them, are responsible for this cooperation. "When we started our business activity in Białystok, we considered the competitive salary level to be a great asset of the city. With time, access to technological thought became more and more important for us. Every year we introduce

**Compared to other large Polish cities, the capital city of Podlasie stands out due to its favourable demographic situation. Numerous universities and schools, open to cooperation with companies, ensure a large supply of qualified staff.**

### EDUCATION



130 new products. Out of 750 employees, 60 are engineers. And most of them are graduates of the Technical University of Białystok,” says Piotr Sosnowski, President of SMP Poland. As he adds, the company also cooperates with the Technical University of Białystok in the field of research and joint doctoral theses are being prepared. Such cooperation has become an everyday occurrence, not an exception in the capital of Podlasie region.

The boards of Białystok universities (these are advisory and opinionating bodies established under the Act of 2018) include representatives of local companies, and new fields of study and specialisations are created taking into account the needs of the local economy. What does it look like in practice?

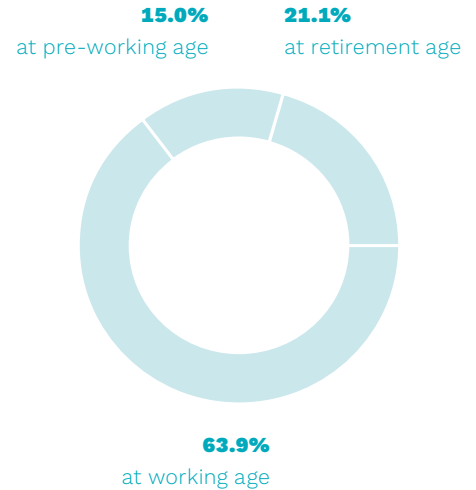
The Białystok University of Technology offers courses in construction process engineering and practical electrical engineering (with specialisation in industrial automation). The latter is a dual course, i.e. it is conducted in cooperation with 12 industrial companies, which not only provide traineeships and internships to students, but also influence the curriculum and conduct workshops. For several years now, the University of Białystok has been cooperating with the IT company Asseco Data Systems in the field of traineeships, internships, diploma theses and scientific projects. The university offers as many as 11 philological faculties (excluding Polish philology), including many bilingual ones. The Medical University of Białystok, although it educates mainly doctors and pharmacists, is also open to cooperation with business.

“At the Medical University of Białystok we conduct research programmes on commission, but we also search for technologies developed at the university which can be translated into a business idea and we try to make investors interested in them,” explains Dr. Andrzej Małkowski, Head of Technology Transfer Bureau at the Medical University of Białystok.

Qualified employees are educated not only by universities, but also by technology and vocational schools. Many of them cooperate with enterprises on a regular basis, e.g. by creating patronage classes. For example, in the Complex of Vocational Schools No. 5 there are six classes under the patronage of companies from the construction industry, which not only provide additional equipment for workshops, but also organize training and internships. In the multiprofessional classes of ZSP No. 5 there is a dual system of education, under which, apart from school lessons, students take practical classes in 41 workplaces. The dual system of educating specialists for two industries, catering and automotive-mechanical has also been implemented at the Władysław Anders Technical School Complex.

## POPULATION

2018



“

**Right after establishing our office in Białystok in 2008, we immediately signed cooperation agreements with universities. Our cooperation includes, among others, conducting classes at the university, traineeships and student internships,” Konrad Świrski, President of Transition Technologies.**

## IT'S NOT ONLY ABOUT MONEY

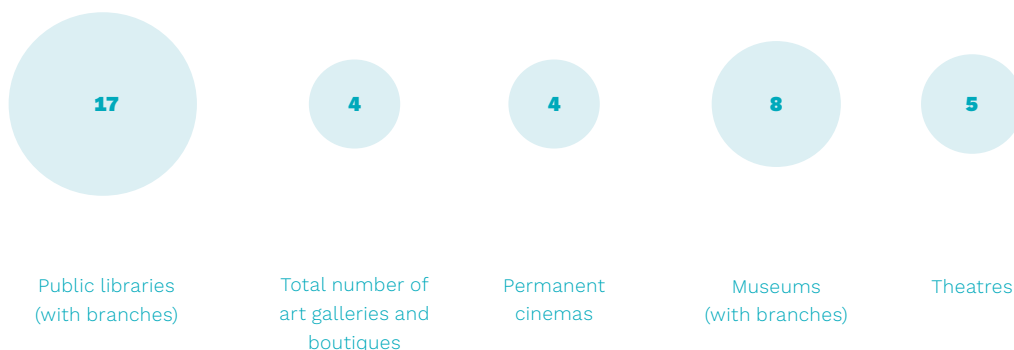
The fact that high quality of life is the greatest asset of the capital of Podlasie region is confirmed by numerous rankings from recent years. It started with the ranking published by British daily newspaper "The Guardian" in 2014, based on surveys conducted among inhabitants of 79 European metropolises. Białystok ranked 19th, higher than any other Polish city. In the surveys taking into account Polish cities, the capital city of Podlasie was always in the lead if not the winner.

"Living conditions are Białystok's greatest asset. The city's population is large enough to provide a good cultural and recreational offer, but at the same time the city itself is small enough to be easy to navigate and it's also easy to get out of the city. Białystok will appeal especially to all those who value family life. I wouldn't change Białystok for Warsaw, where I studied," says Mariusz Bednarko, Business Development Director at Infinity Group. "I lived and worked in Warsaw and Łódź. Compared to them, Białystok is a perfect place to live. Even when you live outside the city, you can quickly reach the city center," adds Marta Karpińska-Cukierman, co-owner of Dynamic Solutions, a software company.

The characteristic feature of Białystok is the ubiquitous green areas, which occupy more than a quarter of the city's area and contribute to good air quality. According to analyses of the Polish Smog Alert, Białystok is one of the cities with the lowest average annual concentrations of PM10. However, the city authorities are not resting on their laurels and are taking actions to further improve air quality, e.g. by promoting the use of public transport and cycling. Białystok takes care of the latter by expanding the network of cycling routes. At the end of 2018 it was 128.4 km long. Since 2014, Białystok has been offering a system of BiKeR bicycle rental services (Białystok Cycling

**Although Białystok is one of the least affluent voivodship cities, it is a leader in terms of living conditions. The city is green, safe, and it can boast a very rich cultural offer.**

### CULTURE





Communication, which also covers a part of the metropolitan area, including Choroszcz and Juchnowiec Kościelny). Currently, it offers 659 bikes in 63 points, including tandems and children's bicycles.

Bicycles and a well-developed public transport system (buses), as well as investments in downtown roads cause that Białystok is easy to navigate by car. The company TomTom, which has been analysing car traffic in more than 400 agglomerations around the world for many years, consistently ranks the capital of Podlasie among the least congested large cities in Poland. Thanks to a good transport infrastructure and a relatively small area of the city in the opinion of its residents all key services are easily accessible.

The city centre of Białystok (Kościuszki Market Square) closed to car traffic, provides a rich gastronomic offer. Fans of cultural life cannot complain either. The capital of Podlasie is home to the Aleksander Węgierka Dramatic Theatre, the internationally renowned Białystok Puppet Theatre, as well as the Podlasie Opera House and Philharmonic. There are also four permanent cinemas, including one studio cinema. In Białystok the largest museum investment in Eastern Poland is currently underway: construction of the Siberian Memorial Museum. A growing tourist attraction of Białystok is its Halfway music festival (which was held for the eighth time in June 2019) and UpToDate Festival (which will be held for the 10th time in September). The capital of Podlasie is also a convenient starting point for exploring the entire region, including Białowieża Forest, Knyszyńska Forest, Biebrza National Park, Supraśl health resort, as well as the Tatar towns of Kruszyniany and Bohoniki. Sports enthusiasts appreciate the opening of the City Stadium in 2014, where matches of Jagiellonia Białystok, which plays in the first division of the Jagiellonian League, are held.

When asked what they lack in Białystok's recreational and cultural offer, entrepreneurs mention, among others, a golf course that could serve integrational purposes and informal business meetings. This inconvenience may soon be a thing of the past, because in the vicinity of Zabłudowa, located within the borders of the Białystok functional area, the construction of such a facility is planned. In Białystok itself, a sports and entertainment hall in the coming years will be added to the city's numerous attractions. The quality of life in Białystok is highly rated, thanks to which not only people from smaller towns in the region come to Białystok, but also young people who have gone to study in larger cities come back to the Białystok willingly. When it comes to foreigners settling in Białystok, apart from a vast offering of apartments, there are also several English-language kindergartens and schools in the city.

## HEALTHCARE\*

2017 | per 10,000 inhabitants

50 25

beds

doctors

\* data regarding

Podlaskie voivodship

“

**Białystok stands out from other cities in terms of its functionality. For a city of about 300 thousand inhabitants, it also provides a lot of attractions,” Piotr Sosnowski, President of the Białystok branch of the American company Standard Motor Poland.**

## SUPPLY MEETS DEMAND

In the Białystok subzone of the Suwałki Special Economic Zone, located in the south-eastern part of the city in the vicinity of Krywlany airport, with a total area of about 94 ha, at the end of 2018 investors had access to about 50 ha of developed areas, offering the advantage of being prepared for a quick investment process, as well as a good connection with the main national roads in the region. In 2018, Panattoni, a developer company, built a complex of warehouse and production halls with an area of 40,000 sqm in the north-western part of the city, near the S8 road. One of the first tenants is Pilkington, a glass producer operating in Białystok since 1991, which has been a part of the Japanese NSG Group for over a dozen years.

"Apart from the availability of warehouse and production space, there is a visible increase in the availability of high-class office space," says Tomasz Buczek, Director of Strategy and Development Department at the Town Hall.

These words can be confirmed by the fact that at the end of 2018, Białystok offered 67.3 thousand sqm of office space, 20 thousand sqm more than two years earlier. The A-class office space available in the city at that time almost tripled from 13,000 to 33,000 sqm. Within two or three years, this area will increase by another 45,000 sqm.

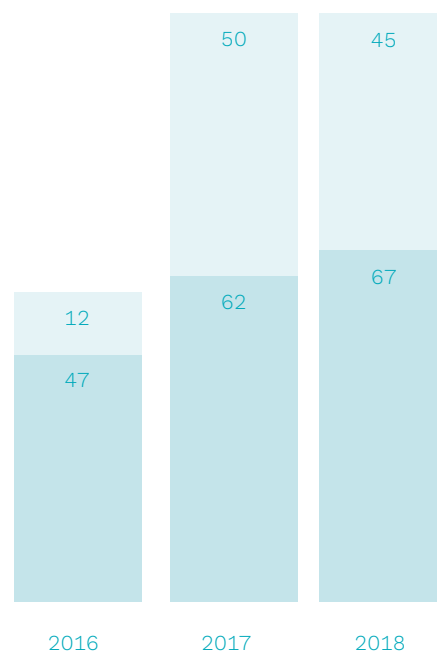
"Smaller companies should already have no problem with finding office space with an attractive rent rate in Białystok," says Marta Karpińska-Cukierman, co-owner of Dynamic Solutions, an IT company employing 18 people. Micro-enterprises can also choose from more and more coworking space. It is offered, among others, by the Białystok Science and Technology Park, but also by more and more numerous private entities, e.g. Explorer HQ and Hacklag. Białystok also provides a rich and constantly expanding accommodation base. In 2018, there were over 2.5 thousand places (8% more than in the previous year) in 29 facilities, including three four-star hotels.

**Developers have noticed a growing demand for office space and are beginning to respond to it.**

**Area covered by the zoning plan**

53.6%

### MODERN OFFICE SPACE



- Area covered by the zoning plan (in thousands of m²)
- Usable area under construction (in thousands of m²)

## SILICON PRIMEVAL FOREST

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In Białystok, the sector of modern business services, including IT services, is thriving. The ABSL industry organisation estimated that in terms of relative increase in employment in this sector between Q1 2018 and Q1 2019, the capital city of Podlasie ranked second largest among 17 Polish metropolises. Foreign companies (Soft-Serve, CERL International, TranscomWorldwide), as well as local companies (Intratel, Infinity Group, SoftwareHut) are more and more willing to open offices here.

The number of creative and technologically advanced companies from outside the IT industry is also growing rapidly. In Białystok there are, among others, Plytan, a manufacturer and contractor of energy-efficient building foundations, and Alex Electro, a manufacturer of small urban architecture with autonomous charging systems for mobile devices. In Zaścianki near Białystok there is Kotniz, a manufacturer of yacht jewellery (i.e. all metal elements used on yachts, usually produced in short series, often by hand), which is the second most important player in this market in the world.

The Białystok Science and Technology Park contributes to the development of innovative companies. Its tenants include ChM, the largest Polish manufacturer of implants and tools for orthopaedics and traumatology, Pakomatic, a manufacturer of intelligent mailboxes, or Technology Applied, a company providing services using 3D printing. Support for start-ups is also provided by other business incubators, operating, among others, at the University of Białystok and the Białystok University of Technology.

Soon the new innovative companies will get another boost of energy as the Bitspiration Booster investment fund, which received PLN 15 million from the regional operational programme to support Podlaskie Starups, is starting its activity.

Craft production flourishes in Białystok and its surroundings, especially when it comes to breweries. At least ten new breweries have been opened in Podlasie in the recent years. In Białystok itself, there is Gloger Brewery, in the nearby towns we can find the breweries Waszczukowe and Zaścianki. Referring to Podlasie's traditional agri-food specialisation, the functional area of Białystok also includes many producers of healthy and ecological food, such as Olejowy Raj (Oil Paradise) from Wasilków.

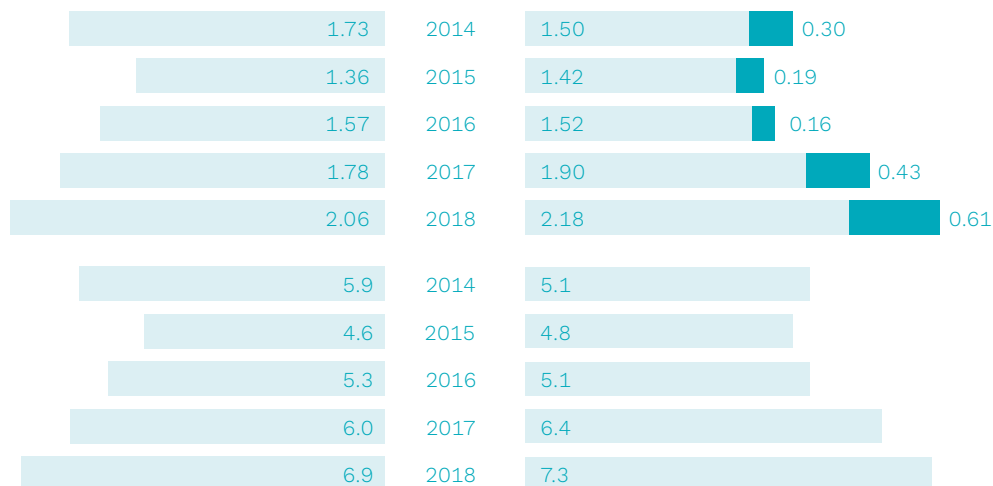
**Podlasie is not associated with modern technologies, it is perceived rather as a typical agricultural area. This image is becoming more and more distant from the reality.**

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues (in thousands PLN per inhabitant)

Expenditure (in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

2017/2018

2018/2019

**10**  
universities

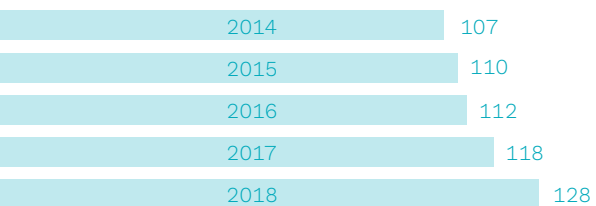
**26,671**  
students

**10**  
universities

**25,086**  
students

## BIKE ROUTES

(in km)



## ELECTRIC CARS

2018

**1**  
charging station

**HOUSING RESOURCES**

2017

**2,033**68 flats per  
10,000 people

2018

**1,928**64 flats per  
10,000 people**Completed  
flats****26.8%****of the city is covered  
by green areas****HOTELS****18****hotels with  
conference facilities**

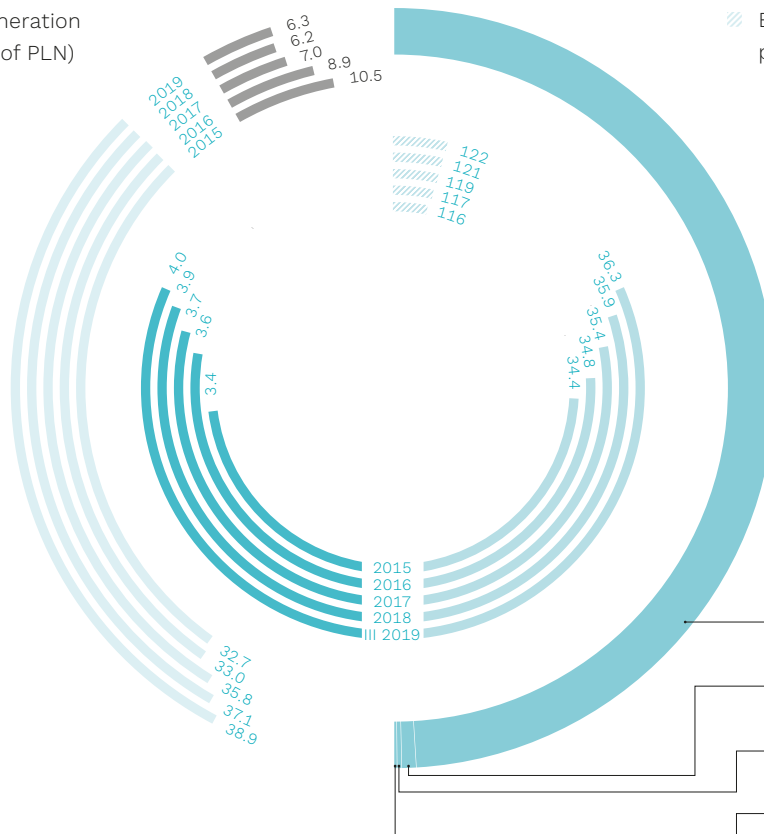
- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)

**COMPANIES IN THE CITY**

- Enterprises operating in the city (in thousands)
- ▨ Enterprises operating in the city per 1,000 inhabitants

**3,471**  
new companies were  
registered last year

**10.6%**  
of all the companies  
registered are  
foreign companies

**COMPANIES  
ACCORDING  
TO EMPLOYMENT**

- 96.2%** of micro companies (up to 9 employees)
- 2.8%** of small companies (10–49 employees)
- 0.9%** of medium-sized companies (50–249 employees)
- 0.1%** of large companies (over 249 employees)

Sources: Central Statistical Office (GUS),  
survey conducted in the city, own sources









## BYDGOSZCZ

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Voivodeship	Kujawsko-pomorskie
Mayor	Rafał Bruski
Area	176 square km
Population density	2,002 people per square km
Population	350,078
Granting urban rights	19.04.1346

### CONTACT DETAILS

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85-059 Bydgoszcz  
phone: +48 52 585 88 23  
e-mail: barr@barr.pl

# BYDGOSZCZ: GOOD INVESTMENT CLIMATE

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## **RAFAŁ BRUSKI, MAYOR OF BYDGOSZCZ**

Bydgoszcz is an important centre of modern technologies, industry and business services. Its biggest assets include a good location in terms of communication, wide access to investment areas as well as young and well-educated inhabitants. Experts confirmed in the World Bank report that Bydgoszcz is the easiest place to do business in the country. More and more IT companies decide to locate their offices in our city.

## **RAFAŁ JERZY, CEO OF THE CAPITAL GROUP IMMOBILE**

Bydgoszcz has rich industrial traditions and a great investment potential. In contrast to drained and expensive leading investment centres, it still offers a large pool of qualified staff and interesting office space. Adding to this its location at the main communication routes and the friendly climate of the city—Bydgoszcz is a great place for business development.



## **DARIUSZ TOPOLEWSKI, CEO OF OPONEO.PL**

The beginnings of Oponeo.pl are connected with the registration of several dozen Internet domains in 1999 and the concept of creating trade information portals by a few friends from Bydgoszcz. To this day, the company has not changed its seat. The advantage of Bydgoszcz, in terms of attractiveness for business activity, is good accessibility of transport and a vast pool of human resources.

## **ROBERT WICHŁACZ, IDM GDC POLAND, MEMBER OF THE MANAGEMENT BOARD OF ATOS POLAND GLOBAL SERVICES**

Our office in Bydgoszcz is the company's headquarters and the largest office of Atos GDC Polska. The Bydgoszcz office currently employs over 3,500 people, including 400 foreigners from all over the world. The development of the company is possible thanks to implementation of the concept of a city open to outsourcing, availability of office space and local IT specialization. We also rely heavily on the increasingly desirable qualifications of the inhabitants of the whole region.





Bydgoszcz has undergone a fantastic transformation over the last two decades, becoming a thriving business centre and home to companies from Poland and abroad. It is here that the big e-commerce player Oponeo was created, and such companies as Frosta or Athos also have their branches in the capital of the Kujawsko-Pomorskie Voivodeship. Bydgoszcz has a thriving economy boasting a well-developed and constantly growing sector of modern business services—headed by the IT industry, represented by many local and international companies, a strong warehouse and logistics market, as well as what Bydgoszcz has been associated with for decades: production and industry.

Pesa is undoubtedly the flagship company of Bydgoszcz. The trains, locomotives and trams produced by the company serve passengers not only in all regions of Poland. They can also be found on the railway routes of Kazakhstan, the Czech Republic, Germany and Italy, as well as in the cities of Central Europe and Moscow.

But Bydgoszcz is not only famous for its industry. It is in this city that the share of IT services in the structure of BPO, SSC, IT and R&D centres is the largest in comparison with other centres in Poland. The Bydgoszcz ICT sector is, to a large extent, made up of branches of international corporations.

In 2019, the successively developing Bydgoszcz branch of Atos was transformed into the headquarters of Atos Global Delivery Center Polska. The company employs over 3,500 people and is the largest employer in the city. The Bydgoszcz specialists are involved in such prestigious projects as e.g. IT support for the Olympic Games.

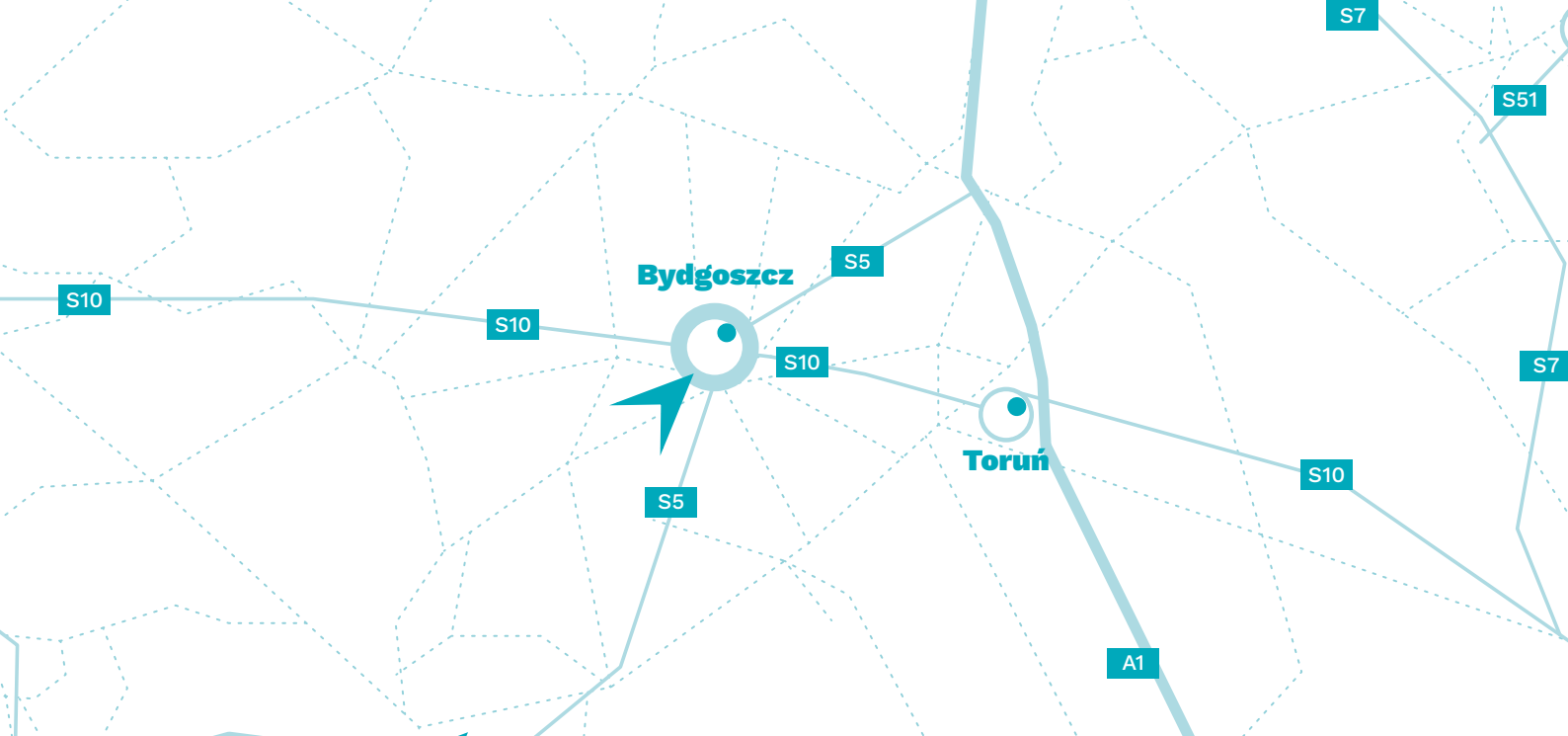
Bydgoszcz's position as an important Polish technological centre is strengthened by the presence of companies such as Mobic, Meelogic, Cybercom or Nokia. According to the ABSL report "Business Services in Bydgoszcz", almost half of the business services centres operating in the city have their headquarters outside of Poland—the Bydgoszcz region hosts, among others, American, French, German, Dutch and Swedish companies.

"We are glad that other international companies can find a good investment climate in Bydgoszcz. Access to technical knowledge, competent human resources and excellent infrastructure are undoubtedly the assets of our city," says Edyta Wiwatowska, President of the Bydgoszcz Regional Development Agency (BARR).

Among the factors that encourage investors to create new jobs in the region, the President of BARR mentions the activities of local government, good cooperation with local secondary schools and universities and the involvement of entrepreneurs themselves. Not without significance is the wide offer of investment areas, all the more attractive as we are talking about a total of about 150 ha located within the city limits, of which about 70 ha remain to be developed in the Bydgoszcz Industrial and Technological Park.

Highly educated staff consisting of young employees, increasingly better offer of the office, warehouse and industrial market as well as the growing quality of life make Bydgoszcz climb up in the rankings of Polish business centres. In terms of employment in BPO, SSC, IT, R&D service centres, Bydgoszcz is already the eighth largest city in the country.

**Bydgoszcz, which until recently was associated mainly with modern industry, is now becoming one of the key IT and business services centers in Poland.**



539,8 km

**hard surface public roads**

- motorways and expressways
- railways
- airport
- railway station

## LOCATION AS AN ADVANTAGE

One of the strongest assets of Bydgoszcz is its transport location. The capital of the Kujawsko-Pomorskie Voivodeship and the eighth largest city in Poland is located on the route of the pan-European transport corridor VI A, which runs along the route E261, providing good connections with Poznań or Wrocław, as well as access to the A1 motorway and Gdańsk, 170 km away. The S5 expressway, which is currently under construction and the planned S10 expressway strengthen the transport attractiveness of Bydgoszcz. The plans also include modernization of railway lines, of which the most important project is the improvement of the transport route between TriCity, Bydgoszcz and Silesia. For investors, the international airport in Bydgoszcz, located near the city centre, which provides a direct connection with Frankfurt am Main, London or Warsaw, is a significant transport facility.

## TAKING CARE OF INVESTORS

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Bydgoszcz prides itself on providing efficient services to investors, who can count on many incentives and comprehensive assistance. Attracting new companies to the city, creating friendly conditions for their development and supporting them in particular stages of investment implementation are the responsibility of two specially established municipal companies: Bydgoszcz Regional Development Agency (BARR) and Bydgoszcz Industrial and Technological Park (BITP). BARR operates in a valued “one stop shop” model. For investors, it means that they can do a number of things in one place, instead of running between different institutions. Thanks to BARR they will sort out administrative and formal issues, find appropriate space in the database of investment offers: office, warehouse or plot, obtain assistance in the recruitment of employees and get information about available forms of investment incentives. One of them is exemption from property tax in return for the creation of new jobs or investments in high standard office properties in newly built buildings.

Each investment project is accompanied by a manager who accompanies the investor at every stage of the process, facilitating contact with the network managers, DDMiKP or the substantive departments of the city office. BARR also provides services in the so-called post-investment assistance and facilitates cooperation between business and local government.

The second municipal company, besides BARR, which supports investors in Bydgoszcz, is Bydgoszcz Industrial and Technological Park. BITP is one of the largest parks in Poland, offering land with a total area of 286 ha, where investors can still find 70 ha of land for investment, it undertakes a number of activities including the separation and geodetic division of plots for the investor's needs, hydrogeological surveys of land, construction of new infrastructure and expansion of existing infrastructure.

Bydgoszcz as an attractive place to do business has been appreciated not only by investors. This is confirmed by numerous awards and distinctions, and the first place in the World Bank's report “Doing Business in Poland 2015” can be considered one of the most important. The authors recognized Bydgoszcz as the city offering the best conditions to run a business.

**Two municipal companies make sure that investors are never left alone in Bydgoszcz.**

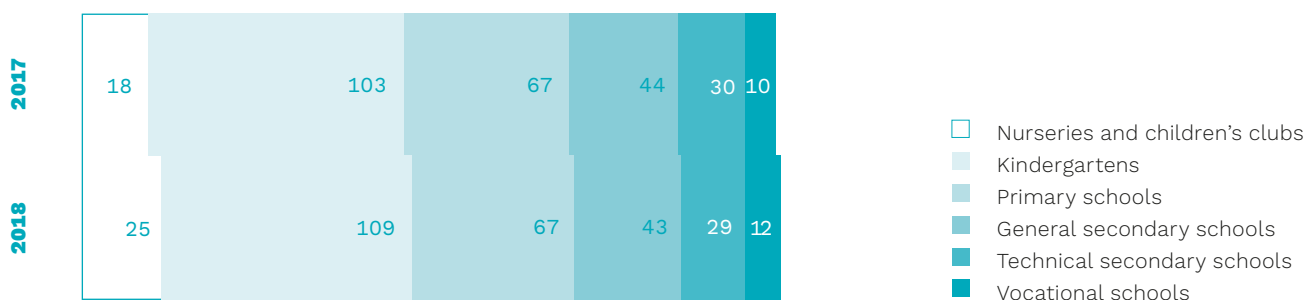
## INNOVATIVE BUSINESSES WITH SPACE FOR DEVELOPMENT

Young, creative entrepreneurs in Bydgoszcz can count on, among others, assistance from the Bydgoszcz Regional Development Agency, which comprehensively supports them by offering various instruments. Within the framework of the Acceleration Action BARR organizes “meetings with entrepreneurship”, simulations of running a business or creating a business plan. Throughout the year it also invites you to participate in dozens of free training courses and conferences. Their aim is to develop personal and professional competences of entrepreneurs, employees and people who intend to start their own business. Contacts between entrepreneurs are fostered by networking meetings organized by BARR, such as the conference “Start-up Bydgoszcz”!

Young companies in Bydgoszcz can also use coworking offices, such as MDD Work Together, or the Idea Przestrzeń Biznesu building dedicated to the development of start-ups in BITP. Innovative businesses have a chance to develop in cooperation with the University of Technology and Life Sciences and Kazimierz Wielki University in the technology transfer centres created there. Young people can learn how to transform the broadly understood artistic activity into business at the Department of Creative Industries at the University of Economics in Bydgoszcz. So the right environment is there. And what does it foster? For example, RevDeBug, an innovative project that allows even a hundred times faster diagnosis and repair of errors in applications and systems based on Microsoft technology. The company came from Bydgoszcz directly to the Silicon Valley. In the Californian business and new technologies area, Tomasz Kruszewski, the owner of the Bydgoszcz-based company, also left his mark on the company.

**Bydgoszcz is a good place to develop any business. In recent years it has been particularly well visible on the example of young and innovative companies.**

### EDUCATION



T-Komp, which since 1996 has been developing advanced IT products and introducing innovative IT solutions onto the market.

In this context, Oponeo.pl—today an important player in the Polish e-commerce industry, which was established in Bydgoszcz in the 1990s by a group of friends—cannot be omitted. “Many factors influenced the development of Oponeo.pl: investments in new technologies, e-commerce market, capital raised from the company’s debut on the stock exchange or professional staff, which we have been recruiting for years mainly from the city of Bydgoszcz,” says Monika Siarkowska, responsible for investor relations at Oponeo.pl. Today, the company is one of Bydgoszcz’s business flagships and a popularly mentioned example confirming that the city is as industrialized as it is digital and innovative..

## LIFE CENTERS AROUND WATER

If we were to point out only one thing because of which Bydgoszcz should be associated with a place friendly and pleasant to live, it would be the Brda River. Flowing through the city centre, it is available to residents, tourists and participants of various cultural and sporting events. You don’t have to look far to find examples. Bydgoszcz hosts the largest open water swimming competition in Poland—Woda Bydgoska, in which the Rio de Janeiro Olympic Games Joanna Zachoszcz and Hanna Bakuniak, world record holder at a distance of one kilometre in winter swimming, took part.

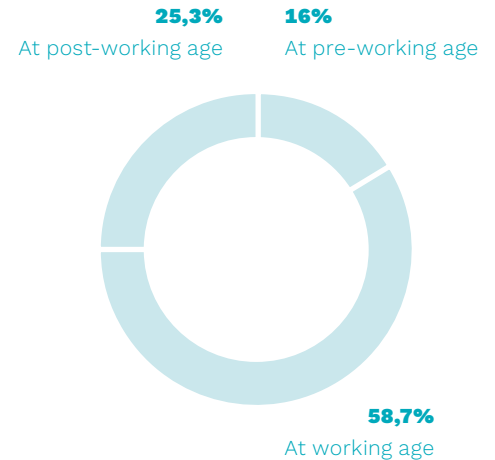
For almost 12 years now, the city has been hosting a water festival called Ster in Bydgoszcz, along with concerts, meetings with travellers and events for the youngest ones. The inhabitants’ involvement in the life around the Brda River is best confirmed by the fact that they set the Guinness record in the largest number of canoes participating in the parade on the water.

“An important aspect for the city are the cultural events in the vicinity of water. In July and August, free concerts, small theatrical forms and cabarets are held by the river at the Opera Nova,” says Łukasz Krupa, Director of the City Promotion and International Cooperation Office, adding that the time from May to the end of September is the time when Bydgoszcz hosts most of all the events, including the cultural ones. Charming boulevards by the river and numerous attractions nearby are a kind of magnet for residents and Polish and foreign tourists.

Both guests and Bydgoszcz residents actively use numerous parks and forest complexes, charming space located in the heart of the city of Mill Island, as well as the largest municipal park in Poland, which is Myślęcinek Bydgoszcz. All this makes it easy to find such a desired—and usually elusive—work-life balance in Bydgoszcz.

## POPULATION

2018



**Bydgoszcz is getting more and more beautiful. One of the greenest cities in Poland has a friendly atmosphere and numerous attractions, especially for those who like spending their time by the water.**

Besides the lively main streets and squares, there are many quiet side streets and alleyways that offer unusual, yet ambient places that are winning more and more awards in industry competitions. In Bydgoszcz there are plenty of alternative cafes, small pubs with a local brewery, restaurants serving delicacies from all over the world, Art Nouveau architecture or unique museums presenting the industrial history of the city. Plans of the local authorities include further projects aimed at revitalizing the city centre and riverside areas in order to turn them into a space for cultural, recreational and business development for the inhabitants. The city has bought, among others, a 100-year-old exhibition hall and today conservation works are being carried out, which will enable the adaptation of the facility and the restoration of its commercial and gastronomic character inspired by Hala Koszyki in Warsaw.

The authorities are also planning a large investment in an impressive complex of Rothera Mills, located on Mill Island, in the very centre of the city. The idea is to create such attractions as Water Gardens, Brain Museum and recreation zones. "We believe that the revitalization of this place will make Bydgoszcz even a more lively place," says Łukasz Krupa.

## HEALTHCARE\*

2017 | per 10,000 inhabitants

47 25

**beds**

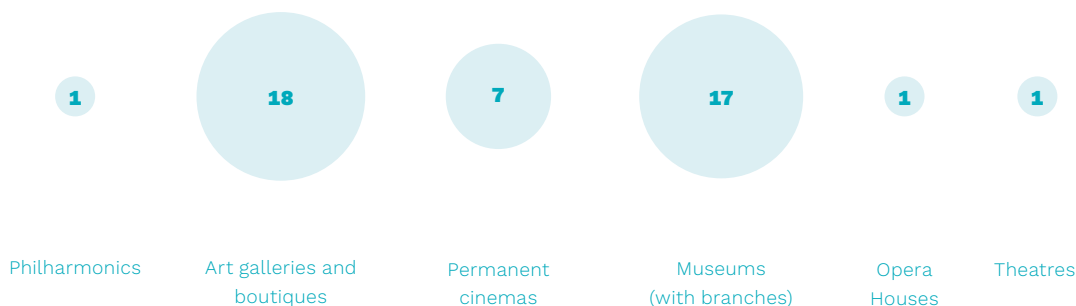
**doctors**

\*data regarding Kujawsko  
-Pomorskie voivodeship

## TOWARDS A CLASS

It's a cliché, but it's worth remembering—what business needs in the first place is space: office, warehouse, retail, i.e.—commercial space. The capital and the largest city of the Kujawsko-Pomorskie Voivodeship offers more and more commercial space, and the market's appetite for modern office buildings will encourage developers to make further investments.

## CULTURE



“Thanks to a noticeable trend of decentralization of companies from the business services sector, we can observe an increased tenant activity, not only in medium-size centres such as Łódź, Poznań or Katowice, but also in smaller cities,” says Jan Szulborski, consultant in the research and advisory department of Cushman & Wakefield. He also mentions Bydgoszcz as one of such centres.

According to calculations by the Bydgoszcz Regional Development Agency (BARR), the office space in Bydgoszcz this year reached the level of over 108,000 thousand square meters, projects under construction include another 20,000 thousand square meters, and over 61,000 thousand of square meters of office space are being planned. Recently, a new class A facility—Immobile K3 office building—has been put into use. It offers 8,800 thousand square meters of office and retail space. Among others, Sii, an IT company, which already operates in 12 Polish cities, decided to open its office there. On the office market it is known for its taste for locations of only top quality. If it had not found such a location in the capital of Kujawsko-Pomorskie, the Sii branch would probably have to be established in another city.

“There is still a need for new office space in Bydgoszcz. Along with the implementation of further projects, new tenants will appear,” says Maciej Wawrzyniak, Director of Sales and Property Management at CDI Konsultanci Budowlani (part of Immobile SA Capital Group), the owner of K3 office building. The building was put into use in 2018, and in autumn 2019 its usable area was leased in 65 percent.

One of the most characteristic examples of class A office buildings in Bydgoszcz is Arkada Business Park at Fordon Roundabout, near the Brda River. One of the companies that decided to locate its office in this modern 10-storey building with a usable area of over 11 thousand square meters was Meelogic, which—as we could expect in Bydgoszcz—is an IT company. “The city has more and more to offer to the sector of modern business services, being a significant and strong center of the IT industry, among others thanks to the greater availability of office space,” says Bartłomiej Łepkowski from the consulting company Savills.

Apart from modern buildings, the office market in Bydgoszcz also offers historic tenement houses, whose ambient spaces have been adapted to create modern, creative places, ideal for smaller businesses. Many companies appreciate such locations, due to the cosy climate, as well as—usually—the proximity of the city center. Buildings dedicated to business from the very beginning are becoming more and more important on the increasingly competitive employee market. They should be preferably built in an attractive location and offer interior standard and amenities of the highest quality. “The competition on the labour market will drive companies to relocate their offices,” stresses Maciej Wawrzyniak from CDI Construction Consultants.

By constantly improving the quality of its office offer and communication accessibility Bydgoszcz can count not only on internal migration of companies, but also on IT companies looking for new opportunities

**Bydgoszcz office buildings are becoming home to more and more companies. Also those that expect space of the highest quality.**

as well as financial and customer service companies from all over the country and abroad.

According to the data for 2018 presented in the BARR and ABSL report, the number of employees in Bydgoszcz's BPO, SSC, IT, R&D centres providing services in foreign languages amounts to approx. 9,500. Together with the centres that provide services in Polish only for customers located in Poland, the number of jobs in this sector has already exceeded 11 thousand people. Since 2016, employment in service centres has increased by 28%.—which shows that with the growth of the sector the supply of commercial space is growing.

At the same time, the market of production and warehouse space for lease is developing very strongly, where every piece of free space is rented in the blink of an eye. The Bydgoszcz offer on the logistics and warehousing market is very strong and currently amounts to over 350,000 square meters whereas nearly 200,000 square meters remain under construction and planning. In 2019, the construction of Panattoni Park Bydgoszcz II, a distribution and logistics centre with an area of 40,000 square meters began. The large logistics and industrial complex Waimea Logistic Park Bydgoszcz is also developing intensively.

## SCIENCE AND BUSINESS GO HAND IN HAND

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As a significant academic centre, Bydgoszcz pays great attention to the education of qualified, future employees. No wonder—the dynamically developing business services sector and a strong manufacturing sector need fresh and talented minds. And there is no shortage of these in Bydgoszcz. “Investors appreciate Bydgoszcz also because of the potential of local human resources. Within 50 km of Bydgoszcz there are over a million people, which puts the city in a privileged position in terms of the availability of personnel,” says Edyta Wiwatowska, President of the Bydgoszcz Regional Development Agency (BARR). This is confirmed by the big business. “Bydgoszcz's location on the map of Poland, the network of connections (road and air traffic), but above all the access to qualified specialists are the main factors that convinced us to open our 12th branch here,” says Anna Boruszkowska-Becmer from Sii Bydgoszcz.

About 29 thousand people study in Bydgoszcz, and every year 8,600 graduates from ten universities enter the labour market. Taking into account the students from the whole voivodeship (about 59 thousand), the number of graduates will increase to about 17 thousand. Some of them, of course, decide to emigrate, but Bydgoszcz itself offers so many opportunities for professional development that

**Bydgoszcz universities meet the demand of business providing highly qualified personnel and supporting companies by, among other things, conducting research work.**



international career becomes only an alternative, not necessarily the most tempting one.

Universities are open to cooperation with business. "The companies we cooperate with are willing to support students and, for example, give them the opportunity to familiarize themselves with the most modern research and production equipment that universities cannot always afford. We are talking about various industries here: purely technical, such as IT, but also medical and agricultural and food industries. This is a benefit for students and universities, but it also allows entrepreneurs to look at students as future employees. It is extremely valuable for them," explains Franciszek Bromberek, PhD, spokesman for the University of Technology and Life Sciences in Bydgoszcz (UTP).

A characteristic example of cooperation between science and business is Atos, one of the largest employers in the region. Thanks to the Atos Academy programme, students in their final years of studies and graduates with junior professional experience can take part in specialist, free training in the company, conducted on a weekend basis. Atos pays attention not only to students, but also to high school students, to whom it offers IT and language training.

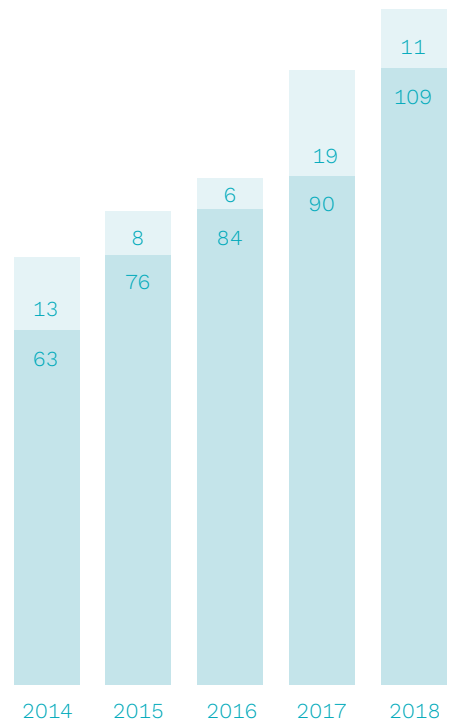
It also runs a partner class with a mathematical and IT profile in one of the schools in Bydgoszcz. Another example of such activities is the Nokia branch in Bydgoszcz. "We are an attractive place to work for highly qualified specialists and students, and hence we attract them to Bydgoszcz. We provide our employees with attractive working conditions, development opportunities, numerous benefits, but also take care of their well-being. A well-developed student internship program offers students from the region the opportunity to develop under the guidance of experienced Nokia engineers," says Henryk Hruszka, Nokia Software CE Signaling & Media R&D Head. The company is working closely with UTP to develop a curriculum in the field of ICT.

Like Athos, Nokia supports and fishes out talents already at lower levels of education. Cooperation with the 8th General Secondary School in Bydgoszcz consists in participation in the creation of the curriculum and organizing programming workshops for students. Every year, several hundred students from secondary schools in Bydgoszcz have a chance to learn about the advantages of working in IT during the conference "IT Women" organized by Nokia. Cooperation at the intersection of science and business in Bydgoszcz is developing rapidly. This is evidenced by the activities undertaken by universities and entrepreneurs: conducting research and development works, creating unique fields of study, such as dual studies at UTP to educate staff for companies from the polymer processing industry thriving in the city, membership and cooperation with clusters, including the Bydgoszcz Industrial Cluster, or the construction of joint laboratories. The effectiveness of these activities is confirmed by numerous awards received by universities in Bydgoszcz, e.g. UKW was awarded the Polish Intelligent Development Award 2017 in the category of "Higher education and science".

### Area covered by the zoning plan

37.87%

### MODERN OFFICE SPACE



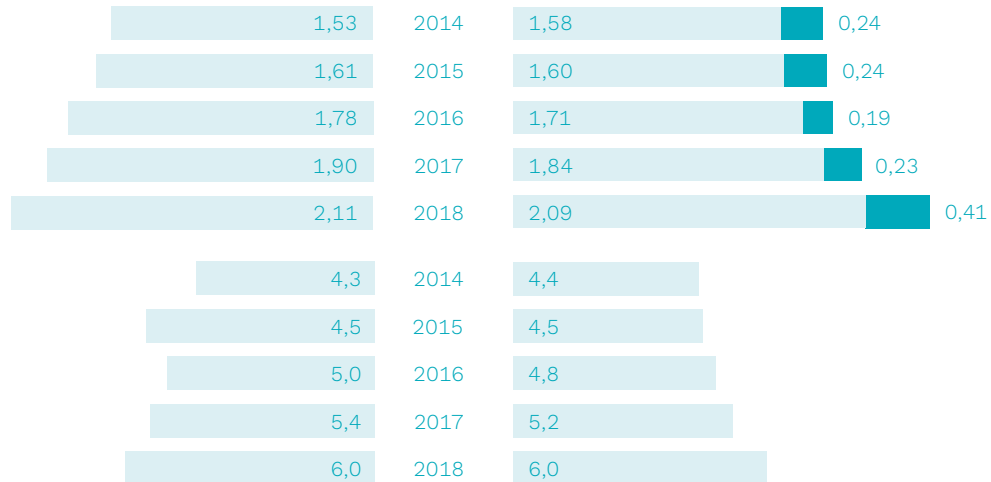
■ Usable area (in thousands of m²)  
 ■ Usable area under construction (in thousands of m²)

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues

(in thousands PLN per inhabitant)

Expenditure

(in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

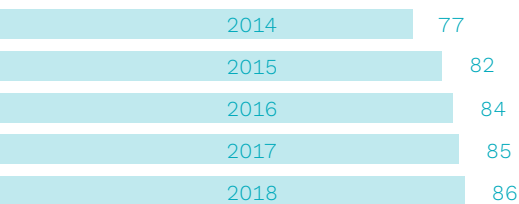
2017/2018

**10**  
universities

**28,813**  
students

## BIKE ROUTES

(km)



## BYDGOSZCZ AGGLOMERATION BIKE STATIONS

2018

**55**  
BRA stations

## HOUSING RESOURCES

2018

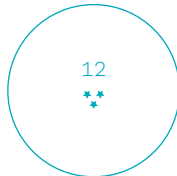
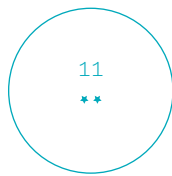
**1,139** Completed flats

33 flats per  
10,000 people

**36.95%**

of the city is covered  
by green areas

## HOTELS



**23**

hotels with  
conference facilities

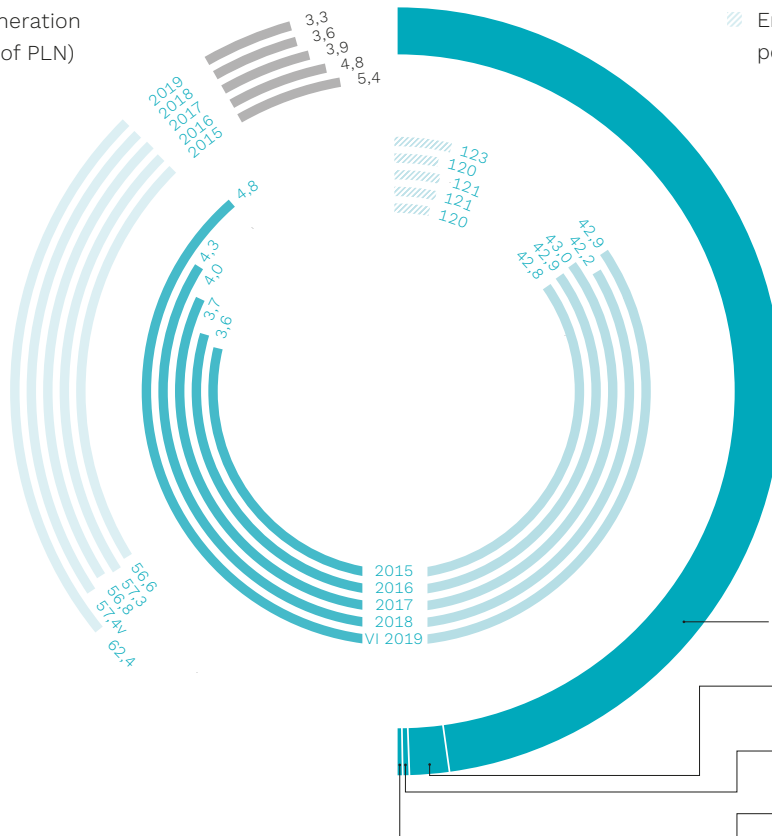
- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)

## COMPANIES IN THE CITY

- Enterprises operating in the city (in thousands)
- ▨ Enterprises operating in the city per 1,000 inhabitants

**3,509**  
new companies were  
registered last year

**0.39%**  
total number of  
economic entities

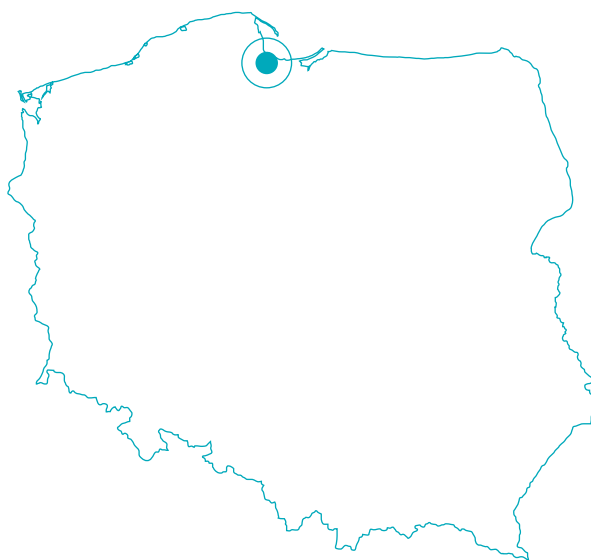


## COMPANIES ACCORDING TO EMPLOYMENT

- 95.7%** of micro companies (up to 9 employees)
- 3.3%** of small companies (10–49 employees)
- 0.9%** of medium-sized companies (50–249 employees)
- 0.1%** of large companies (over 249 employees)







# GDAŃSK

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Voivodeship	Pomorskie
Mayor	Aleksandra Dulciewicz
Area	262 m2 km
Population density	1787 people per square km
Population	468, 158
Granting urban rights	1263 r.

## CONTACT DETAILS

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80-560 Gdańsk  
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e-mail: office@investgda.pl



# FROM THE BALTIC HUB TO ADVANCED SERVICES

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**ALEKSANDRA DULKIEWICZ, MAYOR OF GDAŃSK**

Gdańsk is a unique city, open to the world, new ideas and creative people. Our assets include high quality of life confirmed by rankings, access to qualified staff from various industries, dynamic real estate market and key location on the map of world transport routes, where we have become a real gateway to the countries of Central and Eastern Europe.

**ZENON ZIAJA, CEO OF ZIAJA MEDICINE MANUFACTURING PLANT**

Gdańsk is an open and business-friendly city. In addition, over the years the city authorities have taken care of good transport connections: road, air and rail. Gdańsk, as a university city, offers great opportunities for scientific cooperation. The inhabitants of Gdańsk are modern people, open to the world and innovations.



**PATRICIA CRAMER, CEO OF LUFTHANSA SYSTEMS POLAND**

The main reasons why foreign companies invest in Gdańsk are good education and knowledge of English by the residents, their behavior characterized by high professionalism, commitment and willingness to achieve success. Gdańsk is a truly international city and offers high quality of life.

**MACIEJ KOTARSKI, DIRECTOR OF THE COMMERCIALIZATION  
DEPARTMENT OF OLIVIA BUSINESS CENTRE**

The interest in Gdańsk is constantly growing, more and more investors want to start their business here. This is related to the availability of human resources, which in the agglomeration of more than a million people is of paramount importance. The scale of the phenomenon has an invaluable impact on the development of the city—more office buildings are being built, ports and the tourism sector are developing. The combination of these three branches makes the seaside location highly attractive.



The capital city of Kashubia, located on the Baltic coast and at the same time in the mouth of the largest Polish river—the Vistula—is the most important centre of maritime economy and a transport hub. The most important role is played by the port, which breaks new records of transshipments every year. In 2008, 17.7 million tons of cargo were transshipped there, and in 2018 it was already 49 million tons. Containers are the dominant category, last year 1.94 million TEU. This is due to the gigantic DCT terminal, which is the so-called hub, i.e. a port handling large intercontinental cargo, which serves smaller ports. Following its expansion in 2016 DCT has become the largest terminal in the Baltic Sea. Gdansk's industry also includes strong sectors: shipbuilding, fuel, energy and construction. Lotos, the second largest fuel company in Poland, has its seat here. At the same time, the broadly understood sector of advanced services is developing dynamically. "The data show that the highest growth rate and new investments are recorded in the sector of modern IT services, financial services, research and development or the broadly understood shared services. It is there that the highest employment dynamics can be observed," says Alan Aleksandrowicz, Deputy Mayor of Gdańsk.

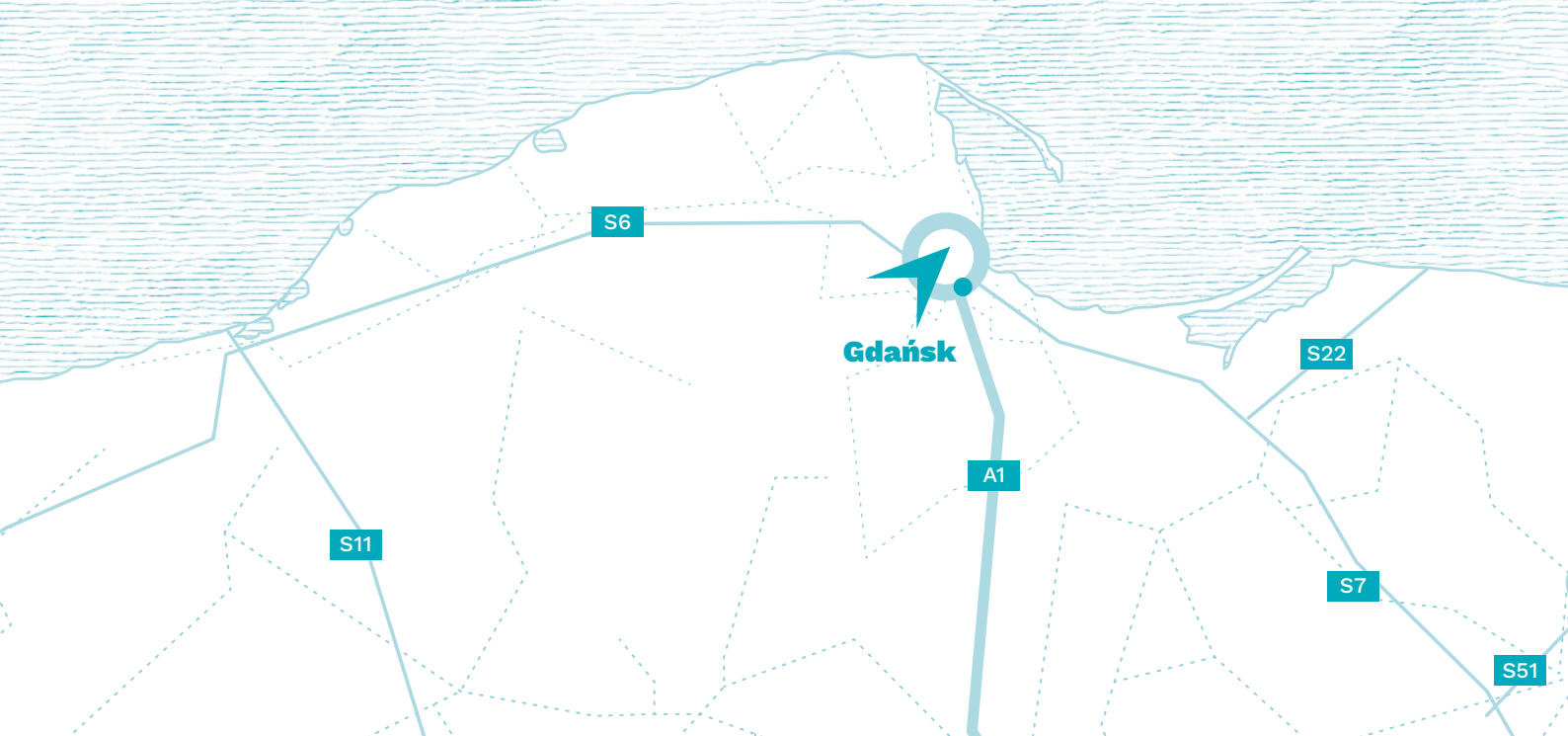
Over the last two decades, world players such as PwC, Bayer, Intel, Amazon, Nordea, Boeing and Luthansa Systems have located their headquarters or powerful branches in Gdańsk. The latter one has been operating in Gdańsk for 20 years now and employs almost 800 people.

An important role is played by tourism, which drives gastronomy and new construction investments. The city centre is a dynamic construction site. The most rapid changes are taking place in the area around the Gdańsk Old Town, where revitalization of further areas is progressing. This year, the Granary Island complex was launched, incorporated into the old town buildings. Tourism drives prosperity not only in gastronomy, but also in the whole sphere of the so-called leisure industry.

"This is the third sector, i.e. what TriCity is known and famous for. It encompasses the entire hotel and catering industry, all service providers who provide services for visitors to Gdansk. It also includes the whole public sector, i.e. museums, zoological gardens and other places," explains Aleksandra Dulkiwicz, Mayor of Gdańsk. Gdańsk is a city where brands known not only in Poland, but also in the world were created. It is here that LPP, one of the tycoons in the clothing industry, has its headquarters. The company has 5 brands, including Reserved, which it sells in 1700 stores on 3 continents. Thanks to this, it creates 25 thousand jobs in total. What is important, however, is that over 1800 people work in Gdańsk alone. These are highly specialized professionals. The Research & Development department alone employs 1100 creative people and developers, who create 41 thousand projects every year.

"LPP is not only a Polish clothing manufacturer, but also a very prosperous technology and logistics company. We rely heavily on proprietary IT solutions developed by over 300 IT specialists we employ here in Gdańsk," says Marek Piechocki, President of LPP.

**The economy of Gdańsk is largely determined by its geographical location. But apart from the port, the development of the city today is determined by industry, modern services and tourism.**



# 972,4 km

**Length of roads in Gdańsk**

- motorways and expressways
- railways
- airport
- railway station

## FERRIES FROM SWEDEN, CONTAINERS FROM SHANGHAI

Gdańsk is an important node in maritime transport. Shipping routes lead from Gdańsk to ports all over the world, including two regular oceanic connections with Asian ports carried out by global shipping alliances: 2M Maersk Line and Ocean Alliance. Gdańsk also has daily ferry connections with Sweden operated by the Polish Baltic Shipping Company and its two ferries.

Air traffic takes place through the Lech Wałęsa Gdańsk Airport. It is the third airport in Poland in terms of the amount of traffic handled (according to estimates, in 2019 it will handle about 5 million passengers). It offers 81 connections to 21 countries, including 10 air hubs. Land transport is carried out, among others, via the A1 motorway, which connects Gdańsk with Toruń, Łódź and the border with the Czech Republic. In the southern direction there is also the S7 expressway, which connects Gdańsk with Warsaw and Kraków. The planned S6 will in turn lead to Szczecin. Gdańsk is located along the railway line E65, which is part of the VI European Transport Cor-



ridor connecting the Baltic countries with the Adriatic Sea. In Poland, the route runs through Warsaw and Katowice.

## ONE WINDOW FOR INVESTORS

In Gdańsk, investors can count on the comprehensive support of many institutions, such as Invest in Pomerania, InvestGda and the Pomeranian Special Economic Zone. In order to make it easier for investors to contact officials, a so-called one-stop shop has been introduced. In practice, it boils down to the fact that already at the stage of first inquiries there is an investor's guardian whose task is to coordinate activities and support the investor at every stage of his activity in Gdańsk: in the period of location analysis, preparation and implementation of the investment, as well as in the post-investment period.

A special role is played by the Gdańsk Economic Development Agency, which operates under the InvestGDA brand. This urban company has been operating since 2008. It deals with the commercialization of investment and office space, sales, support for investors and promotion of Gdansk metropolis projects.

"The task we have been carrying out recently is the support we provide to local companies from the SME sector. Using EU funds, under the „Export Broker” tool, we co-finance export activities of Pomeranian companies. For this group of recipients we would also like to prepare appropriate infrastructure in the Pomeranian Investment Centre, i.e. squares and halls, which are to complement the offer of smaller warehouse and production areas in the port of Gdansk,” explains Marek Ossowski, CEO of InvestGDA.

An important place is the Gdańsk Science and Technology Park, operating under the aegis of the Pomeranian Special Economic Zone. It is a friendly ecosystem for the development of start-ups, mainly from the IT/ICT, life science and energy industries. Currently there are 71 entities located in GPNT, they are larger companies employing many employees, developing start-ups, as well as sole proprietorships renting space in the coworking zone.

Entrepreneurs, especially start-ups, can also count on the help of the Gdańsk Business Incubator Starter. "It is a place whose aim is to catch talents and lead them through the next stages of development. We initiate the involvement of entrepreneurs in supporting young people in their professional careers by enabling them to exercise their competences in a real business environment."—he explains.

Agnieszka Pyrzanowska, Marketing and PR Manager of the Gdańsk Starter. At the Starter's headquarters, entrepreneurs can rent office space, take part in numerous training sessions and receive support in the field of promotion, e.g. through participation in trade fairs or foreign economic missions.

In 2004, the Pomeranian Loan Fund was established to support micro, small and medium enterprises. Over 84% of shares are held by the authorities of the Pomeranian Voivodeship, and 5.7% by the city of Gdańsk.

**Creating favourable conditions for business is a priority for the Gdańsk authorities.**

**What is important, the city cares not only about big companies. Fledgling businesses and start-ups can also count on strong support.**

Since the beginning of its operations, the fund has granted over 6 thousand loans in the amount of PLN 336 million. About 40% of borrowers are start-ups, i.e. companies operating on the market for no longer than 24 months. Gdańsk is a leader in the area of large infrastructure projects implemented in PPP. An example of successful cooperation between the city and business is the development of the northern end of the Granary Island, the development project of the Hay and Crayfish Market and the implementation of a large-scale revitalization of the Lower City, which is being prepared right now. The commitment of the Gdańsk authorities to increase investment attractiveness and the support provided for new investments resulted in the awarding of the European Entrepreneurial Region 2020 award and title to the city of Gdańsk and the Pomeranian Voivodeship by the European Committee of the Regions.

## THE MARITIME NATURE OF SCIENCE

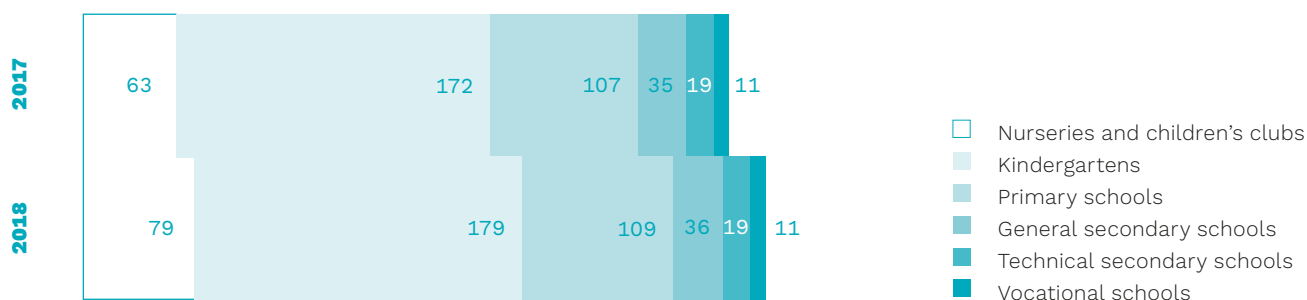
The largest university is the University of Gdańsk, which has been operating since 1970. Over 23 thousand students study at 11 faculties located on three campuses. The university offers 87 fields of study and 277 specialisations.

Every year the University of Gdańsk expands its offer. In recent years the following faculties have appeared: practical computer science, management of health care institutions, production of audio-visual forms, protection of natural resources, genetics and experimental biology, mathematical modelling and data analysis, medical biology and chemical business.

"We belong to the elite group of the network of consortia of European universities selected in the European Commission's competition – made up by only five Polish universities," says Prof. Jerzy Piotr Gwizdała, Rector of the University of Gdańsk. "The UG forms a consortium of the European University of the Seas."

**Today, 13 universities operate in Gdańsk and their graduates are not their only contribution to the development of the city. The collaboration between scientists and business is also getting better and better.**

## EDUKACJA



We have established two international research agencies—the International Centre for Research on Anticancer Vaccines and the International Centre for Quantum Technology Theory—innovative centres of excellence involving the best scientists from all over the world.

Science and education at the University of Gdansk is distinguished by its maritime character. We actively participate in Baltic cooperation through the implementation of international projects, we are the leader of the Consortium of the National Centre for Baltic Research, we have world-renowned scientific stations,” says the Rector.

The University of Gdańsk is also distinguished by its infrastructure. In Gdańsk Oliwa, one of the most modern campuses in Europe has been built in recent years, featuring new faculty and institute buildings and unique equipment. The UG campus has completely changed this part of the TriCity—modern business centres have been established here that strengthen our cooperation with the world of economy.

The second largest university is the Gdansk University of Technology, where over 15 thousand currently study at its 9 faculties. “In the competition organized by the Ministry of Science and Higher Education, the Gdańsk University of Technology was recognized as the best „technical research university” in Poland, but also no 2. among all types of universities, just after the University of Warsaw.

“It is undoubtedly a great success for us,” says Prof. Krzysztof Wilde, Rector of PG. Since 2017 has had the right to use the HR Excellence in Research logo. It is a distinction awarded to elite research universities. “The Gdańsk University of Technology is also the only technical university from Poland that has been included in the prestigious, international Times Higher Education World University Rankings 2016-2017,” adds Prof. Krzysztof Wilde.

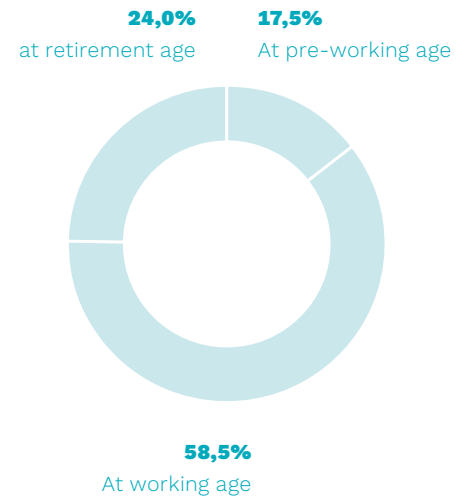
The Gdansk University of Technology cooperates with the business community on various levels. The company Excento, which has been operating since May 2013, aims to promote activities related to the practical application of science and was the first company of its kind in Poland established by the university. An example of cooperation between researchers and business can be e.g. eco-cutlery made of an innovative polymer mixture created by a team of scientists from the Polymer Technology Department of the Chemical Faculty of the Gdansk University of Technology.

The Gdańsk Medical University, educating almost 6 thousand students, doctoral students and post-graduate students, including 935 foreigners (one third of all the foreigners studying in Gdańsk), occupies a high position in the country. Every year, about 180 people from abroad study at GUMed, most of whom are Scandinavians.

The pillar of artistic education is the Academy of Fine Arts, which was founded on the basis of the State Higher School of Visual Arts. The Academy has 4 faculties and its seat is located in the middle of the medieval Old Town, in the very heart of Gdańsk. In 2018, 66 thousand students were studying at all Gdańsk universities. However, the academic potential of Gdańsk expands beyond the borders of the city itself. The Tri-City agglomeration consisting of Gdańsk, Sopot and Gdynia forms a single complementary organism. Higher education institutions located e.g. in Gdynia also provide talent pool for Gdańsk employers. In

## POPULATION

2018



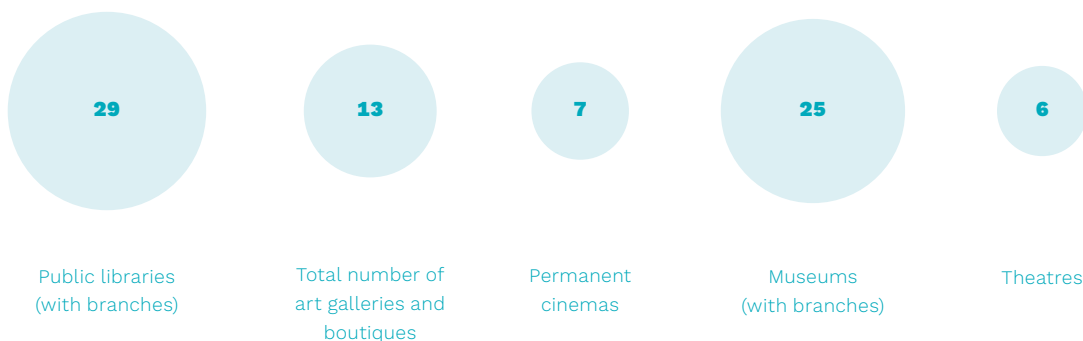
Gdynia we can find, among others, the specialist Maritime University and the Naval Academy. In Sopot, on the other hand, historically connected with Gdańsk, there is a campus of the University of Gdańsk.. An extremely important element of the education system and the labour market is the network of vocational schools. In Gdańsk there are 19 technical and artistic schools, 36 general secondary schools and 11 first-degree vocational schools. The city implements support programmes for education. The newest one is Gdańsk as the City of Professionals, which has covered 9 schools and is supposed to raise the standard of facilities and provide modern equipment. Within the framework of the programme, the famous shipbuilding schools Conradinum—the oldest secondary school in Gdańsk, as well as schools educating staff for the automotive, communication, energy, sea, gastronomy and hotel industry, will be equipped with additional equipment

## SEA, AIR AND CLEAN ENERGY

“Compared to other Polish or European cities, we have clean air, which we owe to our geographical location, but also to a well-thought-out, long-term environmental policy,” says Alan Aleksandrowicz, Deputy Mayor of Gdańsk. “We started in the 1990s, shortly after the political changes, when multi-million dollar investments in water and sewage infrastructure or investments in stoves replacement throughout our metropolis were implemented,” he recalls. Communication—the bloodstream of the metropolis—is an important area where ecological and innovative activities are combined. The city has invested in modern trams and buses. In the case of communication, however, the wider context is important—Gdańsk is not only the capital city of Pomerania, but also the largest center of TriCity, which also includes Sopot and Gdynia. For many years, the main transport tool has been the above-ground SKM railway, and recently—the modern Pomeranian Metropolitan Railway, built from scratch, which connects TriCity with the region. Gdańsk and other local governments participating in the so-called metropolitan ticket project are planning a revolution in

**Gdańsk is strongly committed to ecology, because it improves the quality of everyday life of its inhabitants. After all, air quality is one of the most important indicators of the quality life.**

## CULTURE



travel planning and ticket purchasing. Advanced works are already underway on a system worth over 106 million, which is to serve all transport operators in the region. Travellers will be able to pay with an application which will determine by itself what means of transport there are using and will choose the most favourable fare

“First of all, we focus on modern public transport and allocate hundreds of millions to new trams and buses. Secondly, we are still implementing the stove replacement programme. Thirdly, there is the gigantic, the largest and the best located park in Poland, named after President Ronald Reagan, and many other smaller new parks and squares,” says Alan Aleksandrowicz. “Finally, we mustn't forget about the so-called soft activities, i.e. the educational programme “Gdańsk without plastic”, addressed to all residents of Gdańsk, but also to companies and enterprises operating in the city,” he adds.

“Gdańsk Without Plastic” is an action that started this year. It aims to promote an ecological lifestyle, as part of which the city council and companies have declared a gradual abandonment of plastic products. The Clean Energy Port, which is under construction, is also to combine ecology and innovation. “It is the only installation of this type in Poland, designed from the start to be used for the combustion of residual fractions, i.e. residues from mechanical-biological processing installations (MBP),” says Sławomir Kiszkurko, CEO of PCE. “The main objective of this installation is to manage waste—residues from other MBP plants—which are only suitable for thermal management with simultaneous recovery of electricity and heat in high-efficiency cogeneration. The state-of-the-art heat and power plant built for over PLN 450 million is to be put into operation in 2023. It is to produce 509 TJ of heat and 109 GWh of energy annually from incinerated waste. But the list of elements that make Gdańsk a smart city is much longer. “We cannot forget about the whole e-government. We are preparing new investments, e.g. Nowa Świętokrzyska Street, in the form of electro-mobile bus passes. We want to develop the infrastructure thanks to which we can recharge electric cars, because without it we will not be able to gradually switch to electro-mobility. When it comes to smart solutions we have projects and applications that are related to the functioning of the city, waste or traffic distribution. It is worth mentioning here the establishment of such centres as for instance the Gdańsk IT Centre, the Gdańsk Shared Services Centre or the Gdańsk Contact Centre, which to a large extent is also based not only on this traditional „call centre” but also on electronic contact.

All the time in Gdańsk we are carefully watching what's going on elsewhere and trying to implement modern solutions on our ground,” says Alan Aleksandrowicz. Gdańsk owes its greatest asset, which makes the quality of life here one of the highest in Poland to nature. This city located on the Baltic coast, surrounded by sandy beaches on the one hand, and hilly Kashubia on the other, is a popular place of settlement for Poles from the farthest corners of the country. The Baltic Opera House and the Polish Baltic Philharmonic are the most important institutions of the so-called higher culture. Mass events take place in the modern Ergo Arena. The pride of the city is one of the most modern and beautiful football stadiums in Poland, built for Euro 2012..

## HEALTHCARE\*

2018 | per 10,000 inhabitants

61

**beds**

45

**doctors**

## TRICITY AND ITS MILLION SQUARE METERS OF OFFICE SPACE

The Tricity market is already one of the largest in Poland. According to Colliers International data, at the end of the third quarter of 2019 the total office space in Tricity amounted to 798,000 square meters and 167,000 square meters of space was under construction. This gives Tricity the fourth place in Poland, after Warsaw, Kraków and Wrocław. What is important, Tricity has the lowest vacancy rate. At the end of the third quarter of 2019 it amounted to only 4.8%. According to forecasts, within a year office space in Tricity will exceed 1 million square meters. More than two thirds of the Tricity's office space is located in Gdańsk.

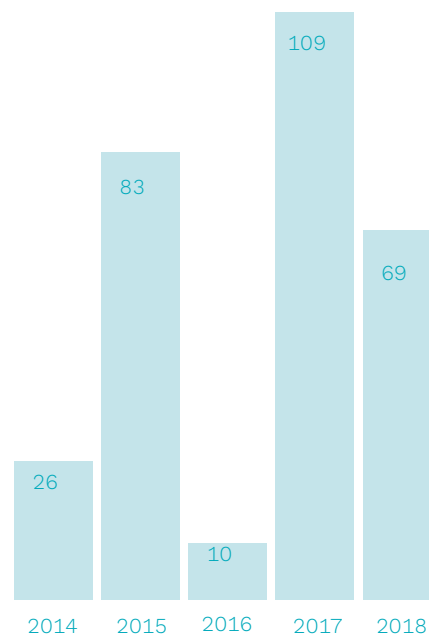
The leader is Olivia Business Centre, located in the Oliwa district. It is the largest office complex in Poland. It has been built since 2010. Tenants are already using the area of 150,000 square meters, and next year – after completion of another building—there will be new 175,000 square meters of office space, and in the following years the complex will reach 230,000 square meters. “The size was not of paramount importance,” says Maciej Kotarski, OBC leasing director. “The most important thing was to use a unique plot of land located almost exactly in the middle of the agglomeration to create a unique business community that would significantly support the development of our beloved Tricity.

There are 200 companies with 12 thousand employees operating on the OBC premises. The distinctive feature of the complex is the highest office building in northern Poland—Olivia Star.

Right next to OBC—also in Gdansk Oliwa—the second largest complex of Gdansk was built—Alchemia, erected by Torus. So far, four buildings with a total area of over 122,000 square meters have been built, 112,000 of which are office spaces. Three buildings have already been sold. The fourth one is still owned by Torus, which manages the whole complex and is also building new ones. “With the completion of the last stage of Alchemia, a certain stage in the history of our company has been completed, but we are facing new challenges. We have secured land for the construction of over 120 thousand square meters of office space in several different locations in Tricity,” says Sławomir Gajewski, CEO of Torus. The largest of the planned investments in Gdańsk is Airport City Gdańsk. It is a project of Gdańsk Airport, in which the city of Gdańsk holds over 33% of shares. In the vicinity of the airport there will be seven buildings with a total area of 120 thousand square meters. The names of the office buildings are to refer to the aviation alphabet: Alpha, Bravo, Charlie, Delta, Echo, Foxtrot, Golf and Hotel..

**Convenient location and availability of qualified talent pool encourage global brands to place their headquarters and branches in Gdańsk. As a result, new office space is constantly being created.**

### MODERN OFFICE SPACE



■ Usable floor area of new and developed buildings (in thousands of m2)

## SPACE TECHNOLOGIES AND MARINE CRUSTACEANS

The incubator of new technologies is the Gdańsk Science and Technology Park, operating in the Pomeranian Special Economic Zone, which focuses on supporting innovative solutions for industry. There are many start-ups here and acceleration programs, including Space3ac Intermodal Transportation. The mission of this accelerator was to develop the Polish space sector. It is worth mentioning that the Polish Space Agency has its seat in GDPNT. Thanks to the program, 23 start-ups have designed solutions for 11 large companies.

The activity supporting and promoting innovativeness is the Technology Incubator run by GPNT for the newly established companies of high innovative potential, operating on the market for no longer than 2 years. Under the framework of the MOLANOTE project, the PSSE has created 6 modern research laboratories to conduct research related to energy-efficient construction and renewable energy sources (RES). The GPNT also hosts conferences and training sessions, such as TrojQA—meetings of the Tricity Testing Community, Young Business Festival or Baltic Robot Battles.

Innovative companies include NNT, which participated in the space technology accelerator Space3ac, co-organized by PSSE, during which it received the award for the best invention. NNT's mission is to implement innovative solutions in the field of steel structure diagnostics in industrial practice. In November, the company signed an agreement concerning the presence of NNT on the market, among others in the USA, Canada and Australia—mainly in the mining industry. On the other hand, thanks to Pirxon, the first Robotics Employment Agency in Poland was established. Pirxon deals with the robotization of back office processes based on Robotic Process Automation (RPA) solutions. In its work he uses Augmented Reality technologies combining the real world and virtual world.

Another company, Chitone, is involved in the industrial use of chitosan, a natural polymer derived from marine crustacean shells or fungal cells. The products are successfully used in the production of hypoallergenic cosmetics, dressings and as an ecological food protection coating. This company, founded by a team of scientists from the Gdańsk University of Technology, is an example of synergy between the local science and business. In 2019, the company, together with the Gdańsk University of Technology, received an award in the 21st edition of the Polish Product of the Future competition and obtained approximately PLN 5.5 million for the development of ChitoVelum® Pro technology – a patented method of dissolving chitosan with carbonic acid. The Pomeranian Interizon Cluster is also located in the GPNT. "The cluster brings together 91 entities, 70 of which are companies. Most of them represent the ICT industry, however there are also many software and electronics manufacturers," says Jarosław Parzuchowski, CEO of the Interizon Foundation.

**Effective incubation of new technologies and new companies is one of the showpieces of Gdańsk. It helps local start-ups expand their reach.**

**Area covered by the zoning plan**

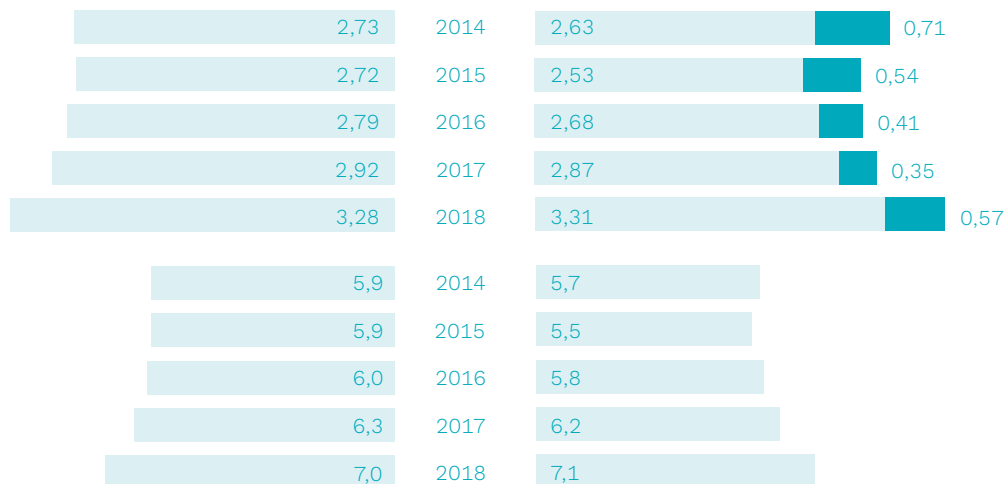
**64.70%**

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues (in thousands PLN per inhabitant)

Expenditure (in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

2017/2018

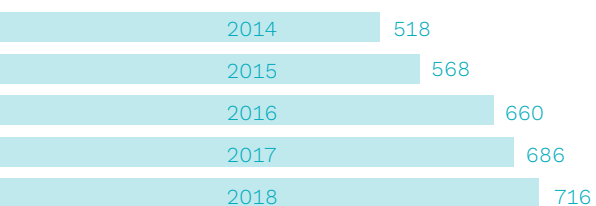
2018/2019

**13** **67,773**  
universities students

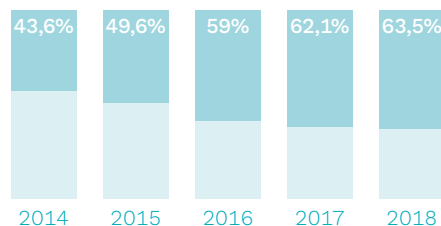
**13** **65,825**  
universities students

## BIKE ROUTES

(km)



## “TEMPO 30” ZONE



■ Streets in Gdańsk  
■ Share of streets included in the “Tempo 30” zone (streets with slow traffic)

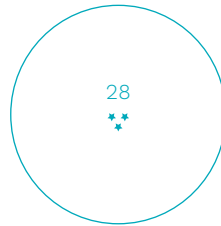
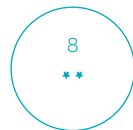


**HOUSING RESOURCES**

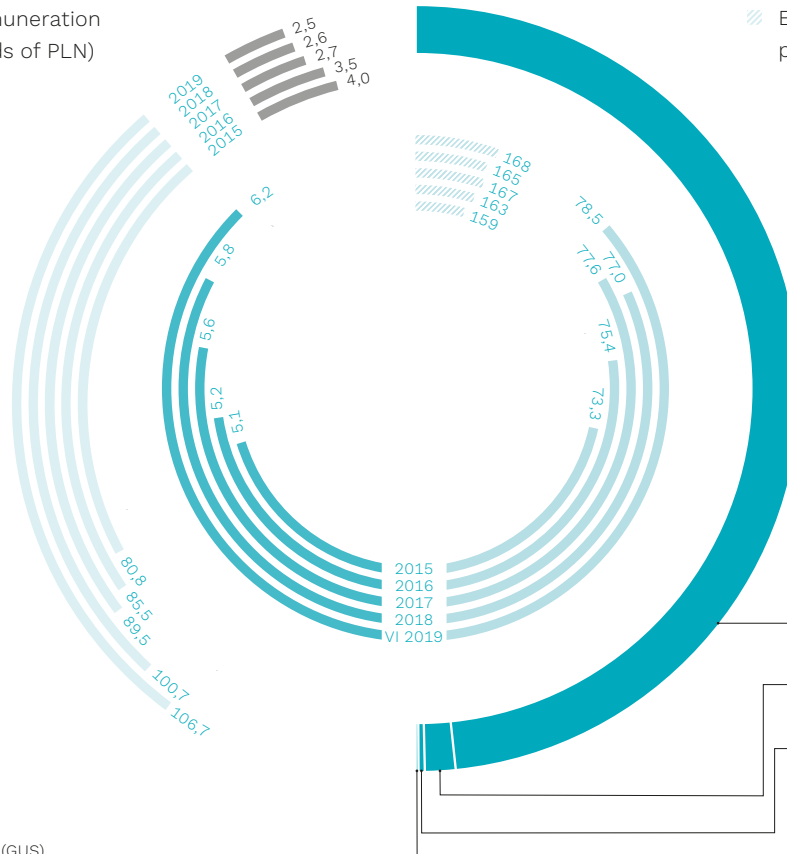
2017

**6,442**54 flats per  
10,000 people

2018

**6,851**67 flats per  
10,000 people**Completed  
flats****24.1%****of the city is covered  
by green areas****HOTELS****36****hotels with  
conference facilities**

- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)

**COMPANIES IN THE CITY**

- Enterprises operating in the city (in thousands)
- ▨ Enterprises operating in the city per 1,000 inhabitants

**7,263****new companies were  
registered last year****1.7%****of all the companies  
registered are  
foreign companies****COMPANIES  
ACCORDING  
TO EMPLOYMENT**

- 96,6%** of micro companies (up to 9 employees)
- 2,7%** of small companies (10–49 employees)
- 0,6%** of medium-sized companies (50–249 employees)
- 0,1%** of large companies (over 249 employees)

Sources: Central Statistical Office (GUS), survey conducted in the city, own sources









# KATOWICE

Voivodeship	Silesian
Mayor	Marcin Krupa
Area	165 sqm
Population density	1,800 people per sqm
Population	294,510
Granting urban rights	11.09.1865
Mirror reflection	Liverpool, Essen, Ostrava
Aspirations	Berlin, Oslo, Vienna

## CONTACT DETAILS

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[mariusz.jankowski@katowice.eu](mailto:mariusz.jankowski@katowice.eu)  
+48 32 259 38 23

# A RE-INVENTED CITY

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## **MARCIN KRUPA, MAYOR OF KATOWICE**

It is definitely worth investing in Katowice, which is best proven by the renowned, global brands such as IBM, Fujitsu or Capgemini, which have decided to operate in our city. The success of Katowice in attracting investors is due to offering exactly what they need. We are a bit like a tailor who can sew a perfectly measured brand suit. Apart from such assets as human capital or excellent office infrastructure, we are distinguished by focusing on the leisure time industry.

## **JAROSŁAW SZYMCZUK, GENERAL MANAGER AT IBM POLAND AND BALTIC STATES**

Its big labour market, excellent infrastructure of the agglomeration and the support of local authorities make Katowice is a very good place to do business. With the opening of our Client Innovation Center here, Katowice has also become an important center in the global IBM service delivery network, becoming one of the key centers responsible for management of our customers' systems.



## **JAKUB KAPUŚCIK, CEO, CO-FOUNDER ABYSS GLASS GROUP**

The city of Katowice is currently definitely one of the best places to start a business in Poland. Since the moment of starting our company, we have received invaluable support from the City Hall and local companies, which resulted in the first projects in Silesia. The city of Katowice is currently changing and developing very dynamically, creating unprecedented opportunities and fostering the sharing of knowledge between companies.

## **GEORGE SLAWEK, CEO, CYBERUS LABS**

Just like such industrial cities as Manchester and Leeds in the industrial North of England, the city of Katowice is turning into a modern post-industrial power, ready to support companies in many industries—IT, automotive, cyber security. Cyberus Labs cooperates with the city in order to secure the smart city infrastructure.



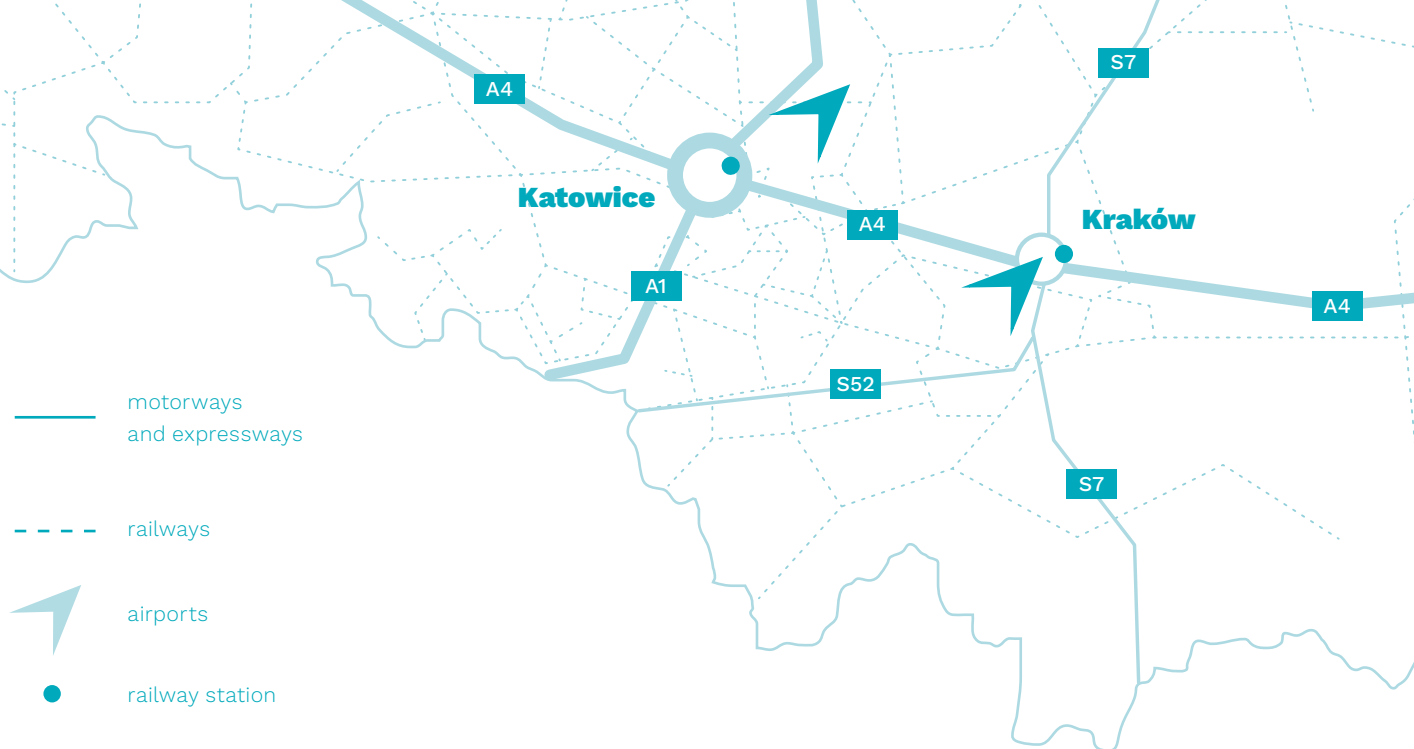
Qualified staff, paying attention to constant improvement of the quality of life and clean air, which is particularly important nowadays, as well as favourable location and convenient connection with the Polish motorway network—these are the main advantages of Katowice, the capital of the region and the only formal metropolis in Poland with over two million inhabitants. Its potential can only be compared with Warsaw—both the city and the entire Upper Silesian and Zagłębie Metropolis are today one of the five most developed centres of modern business services in the country, and at the same time an emerging office space market.

Low unemployment rate, which at the end of March 2019 amounted to 1.7%—the third best result in the country after Poznań (1.3%) and Warsaw (1.5%) is the best proof of investors' interest in Katowice. According to the Central Statistical Office (GUS), the unemployment rate in the entire Silesian Voivodeship amounted to 4.2%. However, lack of labour force is not a big problem—new talent pool is being nurtured at the Silesian universities, and the city has strong arguments in hand to attract people from other regions of the country. Still 20 years ago, two mines and a steelworks operated in the very centre of Katowice. Today, only some symbols are left to remind of the industrial past of the city, such as the renovated Warsaw II winding shaft, which is incorporated into the modern Silesian Museum. The showpiece of the capital of the region is the Cultural Zone, which has been created in the heart of the city, in the place of the Katowice mine. It connects the International Congress Centre, which hosts prestigious events such as the European Economic Congress, the modernized Spodek hall and the wonderful seat of the National Polish Radio Symphony Orchestra, which is famous for one of the best concert halls in the world. The whole is complemented by the unique Silesian Museum, where most of the exhibitions and galleries are located 14 meters underground. In the revitalised post-industrial areas, shopping malls (e.g. Silesia City Center) and innovative parks (Science and Technology Park Euro-Centrum) are being created.

Dynamic changes are reflected in prestigious rankings. According to “fdi Magazine”, the city of Katowice is the leader in terms of the strategy implemented to attract foreign investors (Polish Cities of the Future 2019/2020), and at the same time it is the most civic city in the region and the fifth in the country (Schuman Foundation). As the only city in this part of Europe with the title of the City of Creative Music UNESCO, it is also the organizer of two most important global events—COP24 (in 2018) and the World Urban Forum in 2022.

“Today it is the educated and creative employees with foreign language skills and high quality of life in the city that are the key elements taken into account when choosing an investment location,” emphasizes Mariusz Jankowski, head of the Investor Service Department of the Katowice City Hall. And this is also what the capital of Upper Silesia has to offer.

**From an industrial capital to a modern metropolis, no city in Poland has ever made such a spectacular transformation as Katowice. Now it is time to harvest the fruits of this hard work.**



296.1 km

**hard surface public  
roads per 100 km<sup>2</sup>**

## A METROPOLIS AT THE INTERSECTION OF HIGHWAYS

Katowice and the Upper Silesian and Zagłębie Metropolis are one of the best connected regions in Poland. It is located at the junction of A1 highways (Gdańsk-Gorzyczki, leading further to the Southern European countries) and A4, running from the border with Ukraine to Germany. The S1 expressway, which encircles the city from the South and east, leading to the border with Slovakia, is also of key importance. There are three international airports within 70 km distance from the city: Katowice Pyrzowice, Kraków Balice and Ostrava Airport in the Czech Republic. The city is also an important railway junction for both passenger and freight traffic, which is particularly important for the development of intermodal transport supported by the European Union. In the metropolitan area there is an intersection of the railway lines running from the sea ports in Gdynia and Gdańsk to the South and those leading from the East to the West of Europe. Mobility within the agglomeration is facilitated by the modern diametral highway connecting Katowice with Gliwice.

## THE BEST CLIMATE

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“The advantage of the city is its dynamic authorities that are good at identifying the needs of investors and residents,” admits Barbara Makowska, Global HR Business Partner in Capgemini, in charge of the HR policy. The company is one of the pioneers of the modern business services sector in Katowice, and currently employs almost 24 thousand people in the entire metropolis. Almost 83 thousand people work in hard coal mining in the whole country, including 64,257 underground (ARP data).

It is thanks to a proper analysis of the needs of entrepreneurs interested in the development of their business in Silesia that a special department providing services to investors has been established in the Katowice City Hall. It consists of several specialists fluent in English, German and French. Each company can count on its account manager, who supports it during the investment process. “We are constantly analysing, for example, the needs of the modern business services sector, which has found ideal conditions for development in Katowice. The best source of information is the investors themselves, therefore we focus on direct dialogue,” explains Mariusz Jankowski, Head of the Investor Service Department at Katowice City Hall. Such a policy is very effective, which can be seen in the growth of the city budget revenues from CIT (in 2014 it was PLN 54.2 million, and in 2018—PLN 78.2 million) and PIT (slightly more than PLN 410 million in 2014 and more than PLN 559.8 million in 2018).

The city can also support a marketing campaign to promote a given company. Companies interested in this form of support can count on an arrangement of a suitable venue for a press conference and support in inviting journalists to the event. An unusual form of assistance is the option of creating new, additional bus stops along the existing public transport lines, especially for the employees of a strategic investor. It is also possible to introduce additional connections if needed.

The city of Katowice also focusses on the development of small and innovative enterprises. Still in 2019, the Municipal Incubator of Entrepreneurship Rawa.Ink is to be opened, which is to serve as a catalyst for cooperation of companies from the sector of modern business services or scientists with the start-up environment. “In order for the city to develop in a sustainable way, it should be attractive both for large investors and for the smallest, often family-type entrepreneurs,” emphasizes the Mayor of Katowice Marcin Krupa. By launching the incubator, the city wants to boost the number of innovative companies in Katowice, while undertaking joint actions with investors and secondary schools and universities, the aim of which is to better match the professional qualifications of school and university graduates to the needs of the labour market.

**A special account manager, assistance in organizing a promotional campaign, possibility to adjust public transport to the needs of investors, networking—all this creates a friendly investment climate in Katowice.**

## PEOPLE ARE THE MAGNET

“The city of Katowice has a lot of advantages that attract more investors, including many innovative companies. The city owes its success to its excellent location, developed infrastructure, as well as a large number of students and graduates from various fields of study,” stresses Paweł Mleczek, Managing Director of PwC Service Delivery Center in Katowice.

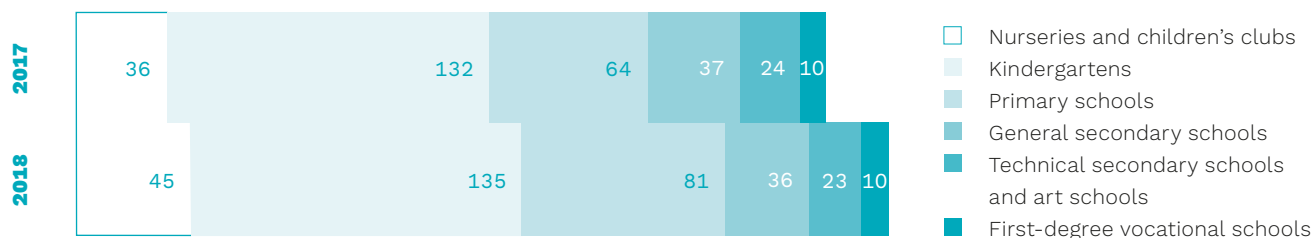
The city and the metropolis are a human resources base for many companies from the IT sector and business services centres represented here. Therefore, it is not surprising that the city is involved in the process of educating future employees for the companies operating in the city. There are as many as 35 higher education institutions in the region with 118 thousand students, and every year about 38 thousand of them join the group of graduates. There are 13 such institutions in Katowice alone—in 2018 they were attended by over 42 thousand students. The largest one is the University of Silesia, which last year had about 5.7 thousand graduates. “We want them to enter the professional life with open minds, curiosity and willingness to explore,” says Prof. Andrzej Kowalczyk, Rector of the University of Silesia in Katowice.

“The high supply of jobs helps us to keep students in the city. They do not have to go to the largest Polish cities or abroad, looking for a job,” emphasizes Marcin Krupa, Mayor of Katowice. The universities themselves provide help in liaising employers with future employees. Companies can publish recruitment offers for students and graduates free of charge, e.g. on the website of the University of Economics in Katowice. The publicly available database includes annually about 1,500 job offers and nearly 700 offers of internships and traineeships.

Such cooperation is mutually beneficial. The University of Economics in Katowice educates, among others, economists, financial experts, managers, entrepreneurs, analysts, IT specialists and communication specialists. In an effective way—according to the third ELA study commissioned by the Ministry of Science and Higher Education, graduates of University of Economics in Katowice (I and II degree studies combined) are the first to find a job after obtaining a diploma (1.88 months)

**Educated, creative, dynamic, fluent in foreign languages—these are the people who the capital of Silesia owes its potential to.**

### EDUCATION





and sign their first employment contract (2.46 months). The university can also boast the best results—category A—in terms of the quality of scientific and research and development activities of as many as three faculties of economics.

“These optimistic statistics are connected with the prestige of the diploma of the University of Economics in Katowice, but also with the social and economic conditions of our region, where unemployment is currently at a very low level. Numerous investors opening their offices in Silesia, e.g. Amazon, Fujitsu, Capgemini, IBM, are looking for highly qualified staff and we provide them with what they need,” says Robert Tomanek, PhD, Professor and Rector of the University of Economics in Katowice. As many as 275 agreements on exchange of employees and students within the Erasmus+ Programme, most of which are concluded with universities in Germany, Spain, France and Italy, help students of the University of Economics to get to know how things work in other countries.

At the University of Silesia, besides traditional courses, one can study game and virtual space design, environmental hazard engineering or micro—and nanotechnology. To develop innovation, the university plans to establish SPINplace—a business centre for creativity, coworking, prototyping and animating projects on its campus. “It will allow to use the potential of the university in creating and implementing products and services and will create an opportunity for students, doctoral students, young companies and inhabitants of the region to develop,” adds professor Kowalczyk. For many years the university has been one of the leading non-technical universities in Poland in terms of the number of patent applications and granted industrial property rights, mainly patents for inventions—which it has over 500.

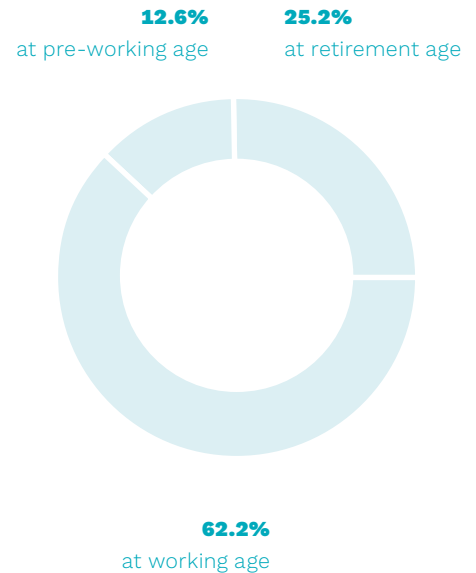
But this is not the only formula that will bring business closer to science. Representatives of companies and administration conduct classes with students, they also opine on education curricula, so that graduates can find a job in the profession they are interested in as soon as possible. For 8 years now, the university has been operating a knowledge and technology transfer centre, responsible for searching for buyers of research and development services and partners interested in implementing the results of research conducted at the university. The research potential and inventions of the university are promoted at industry events. The University is also the first university in the region to have established a special purpose vehicle to commercialize research results by establishing spin-off companies.

The same path is followed by the University of Economics in Katowice, where we can find the Office for Cooperation with Economy and Graduates (which until March 2019 concluded 90 contracts with external entities) and the Centre for Research and Knowledge Transfer (CBiTW), which carries out research and prepares reports for external entities. In the years 2014–2018, the CBiTW implemented 105 such projects with a total value of over PLN 5.3 million.

However, companies operating in the city and region of Katowice are also thinking about adapting curricula to the market needs in case

## POPULATION

2018



of secondary education. For example, X LO high school has a special class with Chinese under the auspices of the University of Silesia, and V LO high school has an IT class under the auspices of the eSport Association and the University of Technology created for people interested in modern information technologies, creating computer games and e-sport.

Barbara Makowska, Global HR Business Partner in Capgemini, Katowice, Poland, has been living in Katowice since 2006. "The city has successfully overcome stereotypes from previous decades, which is good, because the quality of life in a simple way translates into the willingness of young people to work and stay here, which is now one of the key aspects driving investments."

## SUCCESSFUL FIGHT AGAINST STEREOTYPES

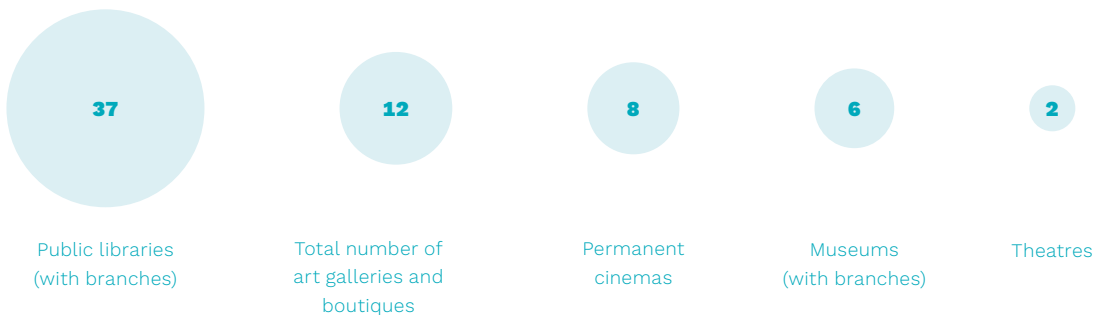
Her opinion could be endorsed both by other investors as well as representatives of the city authorities. Although Katowice residents value the city for well organised public transport and access to workplaces, urban greenery, parks and a large number of cultural and other events are also becoming increasingly important.

Someone who comes to Katowice for the first time may be surprised by how green this city is. Green areas constitute more than 45% of the once industrial capital, including Murckowski Forest reserve with a beech forest as old as 220 years. The city does not limit itself to improving the quality of life, but it also tries to develop the whole leisure time industry by creating new recreational areas (e.g. in the Katowice Valley of Five Ponds Morava in the quarters of Szopienice and Burowiec), expanding the network of bicycle routes (currently there are 180 km of bike routes in the city) or developing a city bicycle rental system.

More than 600 Nextbike bikes are expected to appear at 75 stations this year, but the number is expected to double in the coming years. Bicycles are to become a real alternative to cars. The incentive

**In the past the city was characterized mostly by heavy industry and mines. Today, the most important thing is to improve the quality of life of its inhabitants, which is facilitated by the development of the leisure industry.**

### CULTURE



to use public transport will be, among others, three interchange centres (in Ligota, at the entrance to the centre of Katowice, the so-called Sądowa centre, which will also become a new bus station, as well as in Zawodzie and Brynow). The city is also building a new tram line to the Southern districts.

All these efforts are undertaken not only to reduce traffic jams, but also—and above all—to improve air quality. In terms of the scale of activities and invested resources, the city of Katowice is a leader in the region in the fight against smog. The city is covered by the AWAIR system, the largest system of air sensors in Poland, and the chimneys are controlled by the drone belonging to the Municipal Police. By 2030 the city hall wants to spend half a billion zlotys on improving air quality. This amount will include high subsidies for the replacement of furnaces and thermomodernisation, as well as the development of electromobility.

Katowice is today one of the leading Polish cities with the most developed infrastructure for recharging e-cars. It consists of 31 public stations located in private and urban areas (68 charging points), and further investments are planned. The stations will be opened, among others, in the city centre, at transfer centres and in the largest housing estates. The development of electro-mobility also includes the purchase of 20 electric buses, of which 5 already travel along Katowice streets.

An important element in the development strategy of the leisure time industry is consistent support for the most important music events (OFF Festival Katowice or Tauron Nowa Muzyka, attracting 10 thousand participants each) or sports events (Volleyball Nations League or Intel Extreme Masters—World Championships in e-Sports—which attract 25 thousand and 170 thousand fans respectively). And thanks to the Zone of Culture, which was created several years ago in the post-mining areas in the city centre, Katowice can boast the best concert hall in Poland (and one of the best in the world), the National Polish Radio Symphony Orchestra, distinguished not only by its beautiful architecture, but also by its extraordinary quality and clarity of sound.

The safety and wellbeing of the residents of Katowice is ensured by a growing number of smart city solutions. The city has the first in Poland intelligent monitoring system consisting of 260 cameras, which detects and alarms dispatchers about several specific events—e.g. collision of vehicles or when it notices a man lying on the street. In the Kościuszko Park special sensors have been installed, which—when “activated” by a pedestrian or cyclist—temporarily increase the intensity of light in the traffic area by 70%.

The efforts of the city authorities are noticed and appreciated by the inhabitants. Over 70% of respondents believe that living conditions in the city have improved over the last three years, and almost 80 per cent of the respondents recommend Katowice as a place to live.

## HEALTHCARE\*

2017 | per 10,000 inhabitants

55 25

**beds**

**doctors**

\* data regarding  
Silesian voivodship

## A GREAT PLACE FOR BUSINESS

"Our role is to stimulate the activity of local entrepreneurs and attract new investors to Katowice. Every year we can see an increase in the number of investments in the city, which proves the growing attractiveness of the city and confirms that our individual approach to each investor brings measurable results," emphasizes Mariusz Jankowski, head of the investor service department of the Katowice City Hall.

"As an investor we look at Katowice in a broader perspective. We perceive the city through the prism of the entire GZM metropolis. It is an area of great potential, inhabited by over 2.2 million people. The advantages include, among others: an extensive transport network, large green areas, a thriving event industry, rich cultural, recreational and sports infrastructure," emphasizes Maciej Wójcik, managing partner in TDJ Estate, which is building housing estates and office buildings in Katowice (including the representative KTW in the Culture Zone).

The city of Katowice can boast a modern and still expanding hotel base—more than 20 hotels with 2,090 beds (one five-star and seven four-star hotels). Six more hotels are planned to be built.

In 2014 Katowice had over 280,000 sqm of office space at its disposal, in 2017—446,000 sqm. Currently, the city offers over 520,000 sqm of space for lease, which ranks it fifth in Poland. What is important, office space of the highest quality prevails. In 2018, the usable area of office space under construction amounted to 64,883 sqm and was the largest in recent years. The demand for office space in Katowice in 2018 reached 38,000 sqm and 77,000 sqm of office buildings were under construction—according to the latest ABSL report on the modern business services sector. The biggest ones under construction are Face2Face (developer: Echo Investment) and DL Center Point II (developer: DL Invest).

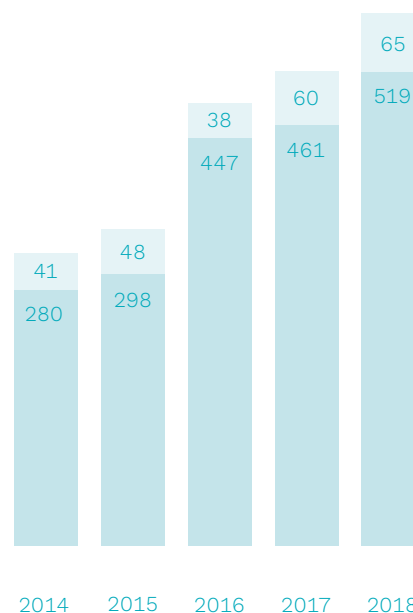
But offices aren't everything. The city also wants to attract companies that will locate new plants here. The investment offer currently includes 19 areas encompassing over 49 ha. The most attractive plots, located in the city centre, are intended for the construction of offices, hotels and flats. These include a plot of 0.75 ha for service and residential development at Al. Korfantego, or 6.4 ha at Bocheńskiego Street, where a technology park could be built. On the plots in Sezamkowa, Brynowska and Korczaka Streets residential investments are planned. Local development plans cover 26.7% of the city's area.

**Global brands are attracted to Katowice by the increasingly better offer of offices and attractive investment areas.**

### INVESTMENT AREAS

49.05 ha

### MODERN OFFICE SPACE



- Area covered by the zoning plan (in thousands of m²)
- Usable area under construction (in thousands of m²)

## IN SEARCH OF A CREATIVE INDUSTRY

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"Mainly thanks to the Silesian University of Technology we have a huge pool of talented, young people here. More and more often, their goal is not to get a good job in a corporation, but to do something of their own, and to pursue their own ideas. In order to succeed, there must be fuel, i.e. private capital. I believe that exactly this area needs to be developed," says Oskar Kiwic, President of Cardio Cube, a start-up in Katowice, who created software for supervising patients with heart failure.

Innovative companies such as Netizens, Netology, 3soft, Abyss Glass have become well established in the post-industrial spaces of the Silesian Porcelain plant. In the city and its surroundings, initiatives aimed at residents with entrepreneurial drive who run businesses and those who are just thinking about starting their own businesses are being developed.

The "breeding ground" for creative ideas is to be the Municipal Business Incubator Rawa.Ink. There will be a coworking zone, a space for individual work, a business zone and a Fab-Lab i.e. a small laboratory there. The city pays a great deal of attention to the development of the service sector and creative ideas from the IT, gaming, computer design and artificial intelligence industries.

The success of the Euro-Centrum Science and Technology Park operating in Katowice proves how absorbing the market of companies based on innovations is. But the park is not only the seat of innovative companies. "It is also a modern data processing centre, a research and laboratory field for universities and industry organisations cooperating with us, as well as a centre supporting the technology companies at an early stage of development," explains Roman Trzaskalik, Vice-President of PNT Euro-Centrum. Currently there are about 100 companies involved in environmental protection, energy-efficient construction and renewable energy sources.

Academic Incubators of Entrepreneurship also provide assistance for start-up companies. They operate at the University of Silesia and the Wojciech Korfanty Upper Silesian School of Commerce.

Investors also appreciate the offer of the Katowice Special Economic Zone. There are over 400 companies operating there, which have invested over 36 billion PLN and created nearly 80 thousand jobs.

"We attract business with a wide range of pre—and post-investment services, as well as available properties, whose offer has been increased by 30% to 773,4 ha. We have expanded and modernized the technical infrastructure and together with local partners we have invested 60 million PLN in the preparation of investment areas," says Janusz Michałek, President of the KSSE.

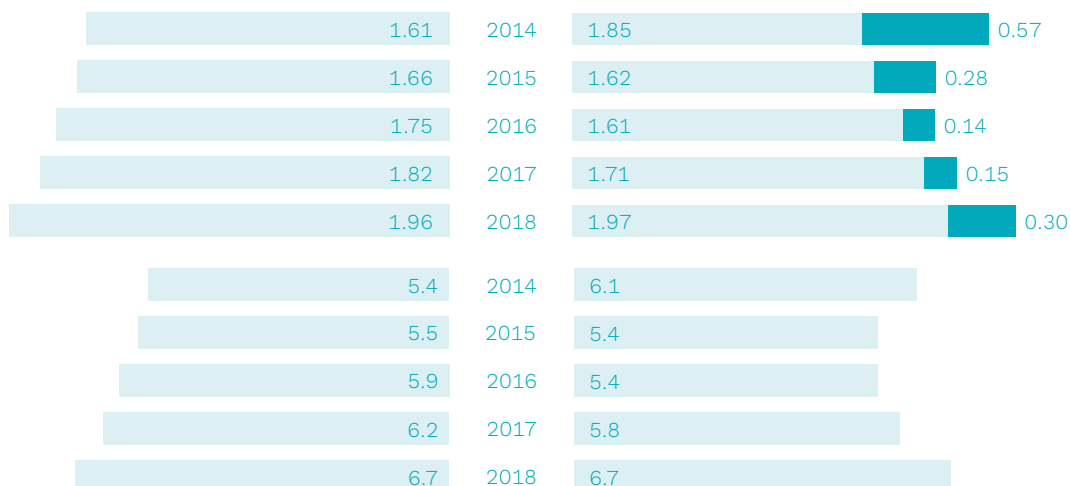
**The city of Katowice wants to become a heaven for start-ups—an annual competition with one million zlotys up for grabs for young companies that will start their operations in the city, has been announced by the city's Mayor Marcin Krupa.**

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues (in thousands PLN per inhabitant)

Expenditure (in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

2017/2018

2018/2019

**13**  
universities

**44,679**  
students

**13**  
universities

**42,620**  
students

## BIKE ROUTES

(in km)



## ELECTRIC CARS

2018

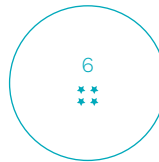
**29**  
charging stations

**HOUSING RESOURCES**

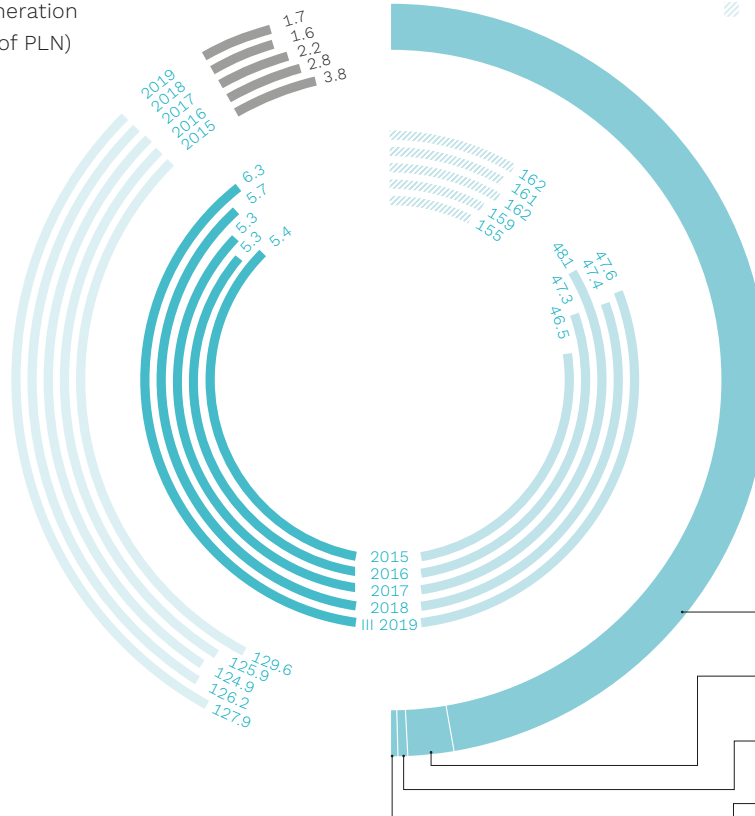
2017

**1,642**55 flats per  
10,000 people

2018

**894**30 flats per  
10,000 people**Completed  
flats****47.4%****of the city is covered  
by green areas****HOTELS****17****hotels with  
conference facilities**

- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)

**COMPANIES IN THE CITY**

- Enterprises operating in the city (in thousands)
- ▨ Enterprises operating in the city per 1,000 inhabitants

**3,547****new companies were  
registered last year****12.4%****of all the companies  
registered are  
foreign companies****COMPANIES  
ACCORDING  
TO EMPLOYMENT**

- 94.5%** of micro companies (up to 9 employees)
- 4.4%** of small companies (10–49 employees)
- 0.9%** of medium-sized companies (50–249 employees)
- 0.2%** of large companies (over 249 employees)

Sources: Central Statistical Office (GUS), survey conducted in the city, own sources







# KRAKÓW

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Voivodeship	Małopolskie
Mayor	Jacek Maria Majchrowski
Area	327 sqm
Population density	2,358 people per sqm
Population	771,069
Granting urban rights	5.06.1257
Mirror reflection	Nuremberg, Leuven, Milan
Aspiration	Barcelona, Vienna, Bilbao

## KONTAKT

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# TRADITION COMBINED WITH MODERNITY

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## **JACEK MAJCHROWSKI, MAYOR OF KRAKÓW**

Kraków is a European metropolis combining tradition with modernity. The city is an important tourist and business center recognized worldwide. Kraków is also one of few large Polish cities with a constantly growing number of inhabitants. What is more, the city has been involved in implementing projects focused on supporting entrepreneurship and start-ups for years.

## **JOANNA SZTEFKO, OPERATIONAL DIRECTOR, WAWEL**

As a candy producer from the Kraków region, we feel that we can draw some significant benefits from our company's location in the vicinity of an agglomeration with such a large intellectual potential. Thanks to it we can deal with technological and technical issues in cooperation with technical schools and universities and we can count on the availability of educated and experienced staff.



## **KONRAD TARAŃSKI, VICE PRESIDENT OF COMARCH**

Today, Kraków is perceived as one of the best places to locate investments in the field of technology, mainly due to access to well-educated graduates of Kraków's universities. After all, it is human capital that largely determines a company's success, especially in the high-tech industry. The strength of the city is also evidenced by the efficient cooperation with the local government, universities and the KTP (Kraków Technology Park).

## **MAŁGORZATA PODRECKA, VICE PRESIDENT OF THE CANPACK GROUP**

Over the last years we have seen a dynamic flow of investment into Kraków—many international corporations have decided to place their shared services centers here. Due to its academic character, the city has become a unique platform for cooperation between science and business. Entrepreneurs from all over the world are also drawn to Kraków thanks to its cultural diversity and thriving cultural scene.





The capital of Małopolska, due to its demographic, economic and cultural potential, is the second largest city in Poland after Warsaw. In the classification of the European urban centres, it is often compared to Barcelona, Edinburgh or Nice. The magnet that every year attracts crowds of tourists to Kraków is its unique historical architecture. It is a very strong magnet—in 2018 the city was visited by 13.5 million people, including as many as 9.65 million tourists who left almost PLN 6.5 billion in the city (this amount has doubled in the last six years). But looking at the city only through the prism of a tourist Mecca is wrong.

Kraków is a pioneer in many initiatives that set trends for other large cities, such as its fight against advertising, too much concrete in the city, poor quality air or traffic jams. “We always try to be a step ahead,” says Mayor Jacek Majchrowski.

In 2010, Kraków was the first city in Poland to enact the creation of the Cultural Park Old Town to protect the cultural landscape, monuments and the historical urban layout. Kraków is struggling to improve air quality in an unprecedented way—in September 2019, a total ban on burning coal and wood will come into force in the city, which is steadily reducing the number of old stoves (over the last six years, 21,000 furnaces have been closed down, and the cost of the entire operation amounted to over a quarter of a billion zlotys). Kraków was the first city to adopt an anti-smog resolution, paving the way for others, such as Silesia, Małopolska, Poznań or Warsaw.

The authorities of Kraków listen to the city's residents, so they are trying to reverse another nationwide trend—too much concrete in the city. How? For three years now, they have been buying land for future parks and green areas, a total of tens of hectares. By 2030 as many as 70 new parks are to be established in the city (today there are 47 of them). The city already has nearly 800 thousand inhabitants (the entire agglomeration has as many as 2.5 million inhabitants), 80 percent of whom highly assess the quality of life in the capital of Małopolska. In its latest report on the condition of Polish cities, PwC, a consulting company, assessed that Kraków made the biggest development leap among the 12 largest metropolises in Poland.

Therefore it's not surprising that Kraków is a leader in terms of investment attractiveness—in 2018, according to Tholons Services, Globalization City Index it was recognized as the best location among European cities for BPO/SSC investments.

**One step ahead—  
the Kraków  
authorities have  
been setting  
trends in city  
management  
for years.**



300.7 km

**hard surface public  
roads per 100 km<sup>2</sup>**

- motorways  
and expressways
- railways
- airport
- railway station

## **CLOSING THE RING ROAD AROUND THE CITY**

Kraków is located at the A4 motorway connecting Wrocław with Rzeszów. The largest regional airport Kraków-Balice is located along this route, about 15 km from the centre of Kraków or 25 minutes by car. But this is not the only airport, which can be used by Cracovians. Motorway A4 goes to Rzeszów Jasionka airport which is 165 km away and the airport Katowice Pyrzowice is only 108 km away (also by A4).

The distance between Kraków and Warsaw is almost 300 km, and Warsaw, and the fastest route leads along the S7 and DK7 roads. This year the construction of the 14.8 km long northern ring road of the city has begun, 12.5 km of which is the construction of a new road and 2.3 km is the adaptation of the existing route to the parameters of an expressway. The investment is to be completed at the turn of 2023 and 2024. Kraków already has the following ring roads: western (DK94,

S52 and A4), southern (A4) and eastern (S7). The commissioning of the last one will create a ring road around the city.

Some large railway investments are underway and some are planned in the vicinity of the capital of Małopolska. Thanks to the modernisation of the Kraków-Katowice line (to be completed in 2020), trains will reach the speed of 160 km/h on this route.

## **COMPANIES BLOSSOM AT WAWEL**

There are 142.3 thousand registered business entities operating in the city (thanks to which the city receives over PLN 551 million in taxes). Kraków (except for Warsaw) is the best regional centre in terms of the number of Polish entities. The development of companies is to be supported by the Kraków Programme for Supporting Entrepreneurship and Economic Development of the City for the years 2016-2020, dedicated to the sector of small and medium enterprises, including start-ups. The city applies local tax reliefs (in 2017 235 entrepreneurs benefited from tax reliefs amounting to nearly PLN 2 million), and another half a thousand companies received one-off support to run their business. There is a special application dedicated to business: Virtual Clerk (available at [www.business.krakow.pl](http://www.business.krakow.pl))—it contains the most important information on entrepreneurship and its support offered by the city authorities, as well as information about the service points for entrepreneurs organized by the Kraków Town Hall, i.e. the Kraków “one-stop shop”. It is here that entrepreneurs, in one place and at a time convenient for them (7.40-18.00), can perform most of the activities related to setting up and running a business.

For years, Kraków has held leading positions in rankings of investment attractiveness and business conditions prepared on the basis of opinions of foreign investors. The key sector in the city is outsourcing of services. At the end of 2017, almost 5 thousand commercial companies with foreign capital were registered in the city. Their number increased by over 8% during the year, which means that 375 foreign companies “have come” to Kraków during this time.

A huge role for the development of entrepreneurship in the city and the agglomeration is played by the Kraków Technology Park, which manages the special economic zone (within 20 years it has issued 263 business permits, and investors declared to incur nearly PLN 5 billion in total investment outlays, creating over 28 thousand jobs). Since the new regulations came into force (the government programme of the Polish Investment Zone assumes that the whole of Poland is one large special economic zone), the KPT has already issued over 20 decisions regarding support, and more are in the pipeline.

There are also many clusters operating in Kraków, including LifeScience Kraków, Małopolsko-Podkarpacki Cluster of Clean Energy, Kraków Film Cluster and Digital Entertainment Cluster.

**The scale of entrepreneurship of the inhabitants of Kraków can be described with one number—185. There are so many companies per thousand inhabitants.**

## TALENT POOL NOT ONLY FOR IT

Sebastian Drzewiecki, managing director of Sabre Polska, which has been operating in Kraków for 20 years, employs over 1500 people now. And there is no doubt about what attracts investors here. The choice of Kraków was and is associated with the availability of talented engineers and programmers, which, for a company focused on innovation, is a very important element in building a long-term strategy.

And Kraków attracts new residents not only because of its rich educational and cultural offer. It is a city of young people who can find not only a job here, but also a dream place to settle down for good. The authors of the fourth edition of the “Report on the State of Polish Metropolises” by PwC indicated a very high quality of education at all levels of education among the distinguishing advantages of Kraków.

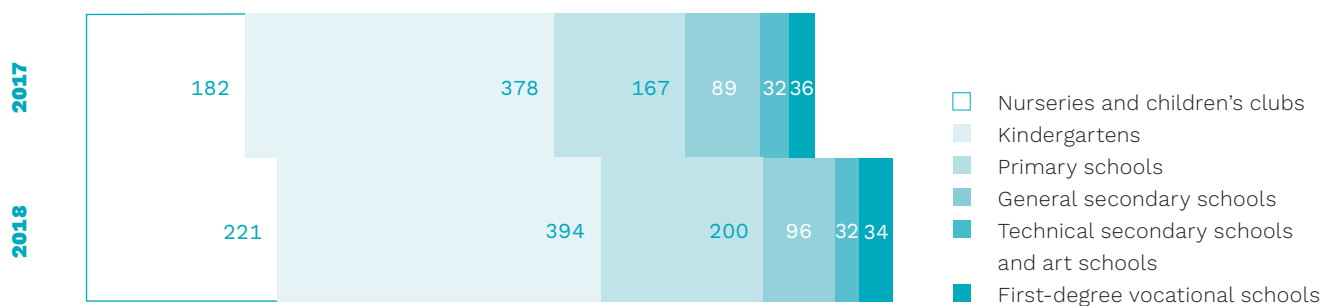
This is evidenced, among others, by the secondary school final exams—the so called “matura” (with 86% pass rate—the third place in the country), which is the result of an above-average level of education in Kraków’s secondary schools. While the average results of the matura exam are slightly above the average for 12 metropolises, the number of school competition laureates is the highest in the country and per capita it is approximately twice as high as the average, according to the authors from PwC.

Kraków is the largest academic city in Poland after Warsaw—there are almost 135 thousand students studying at 23 universities here (students of first and second degree studies, master degree studies), including over 8 thousand foreigners.

The oldest university in the country—the 655-year-old Jagiellonian University—has been one of the two highest ranked universities in the country for years—in the latest ranking of the “Perspektywy” magazine it was chosen (ex-equo with the University of Warsaw) the best university in the country (the University of Mining and Metallurgy named after Stanisław Staszic in Cracow got the fourth place). The ranking examines 29 indicators in the following criteria: prestige,

**High quality of education translates into a fast development of the knowledge-based economy.**

### EDUCATION





graduates on the labour market, scientific potential, scientific effectiveness, innovation and internationalisation. The 16 faculties of the Jagiellonian University educate over 40 thousand students. In 2018, the university opened a large campus (the Jagiellonian Innovation Centre and the CITTRU Technology Transfer Centre are located here), which is called the Silicon Valley in Kraków. Innovative companies (start-ups) operate in its area.

Adrian Ochalik, spokesman at the Jagiellonian University, emphasizes that the university is the largest Polish applicant at the European Patent Office—it filed 12 applications, which gave it the first place on the list of Polish applicants for European patent protection in 2018.

Mateusz Hołda, PhD, co-founder and head of the HEART scientific team at the Jagiellonian University Medical College, was among the Europeans under 30 who were leaders in their respective fields. Hołda was the first student in Poland, who without having finished his studies—received the title of Doctor of Medicine (this is possible thanks to the Diamond Grant programme, of which he was a laureate).

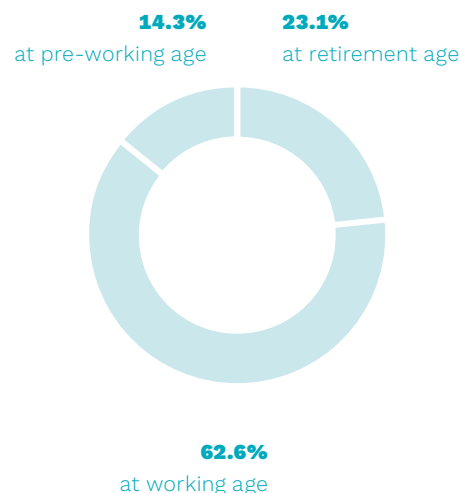
Kraków is considered to be a national hub of technical specialists desirable on the labour market. Of the approximately 50,000 graduates leaving the universities in the capital of Małopolska every year, over 13,000 are graduates of technical schools (almost twice as many as in Warsaw). This is no coincidence—Kraków's technical high school education has been ranked among the very best in the country for years. In the "Perspektywy" ranking for 2017, in the top ten there were as many as three technical high schools operating in Kraków. The city can also boast a much higher pass rate of the math matura exam than the national average. Kraków's universities also have 3.1 thousand graduates of creative faculties every year.

The strong position of education is supported by excellent research and development infrastructure. There are as many as 37 research institutes and research and development centres (R&D) in the city. Prometheus—the fastest supercomputer in Poland and Central Europe (located at the AGH University of Science and Technology) and Solaris—the first Polish synchrotron and the only such multifunctional laboratory in Poland (it is owned by the Jagiellonian University and financed by the EU)—serves scientists in Kraków.

The satisfaction of employees of Kraków's companies is also growing—70.8% of respondents expressed their satisfaction in the last year's survey conducted in the city (in 2014 it was only 44%), and the type of work performed was positively assessed 84.5% of people. Unemployment in Kraków at the end of April 2019 amounted to 2.4%. (data from the Poviát Labour Office). The enterprise sector employs 222.4 thousand people, which is by 20 thousand more than four years ago. The average monthly salary currently amounts to PLN 5.7 thousand gross. An increasingly important group of employees are foreigners—Małopolska is, after Mazovia, the second largest labour market for foreigners. The residence permit has been granted to 40 thousand foreigners in the region (data from the Office for Foreigners), more than half of whom are citizens of Ukraine.

## POPULATION

2018



## SETTING ECOTRENDS

Every day Kraków is the centre of activity for over 1.1 million people—students, tourists and employees, more than 780 thousand of whom are its permanent residents.

No wonder that in the second largest Polish city, car traffic is a very big problem. Every day 120 thousand cars enter the capital of Małopolska. The northern ring road of Kraków running along the S52 expressway, which is currently under construction, is supposed to help the city relieve traffic from the A4 exit in Modlnica to the Kraków-Mistrzejowice junction.

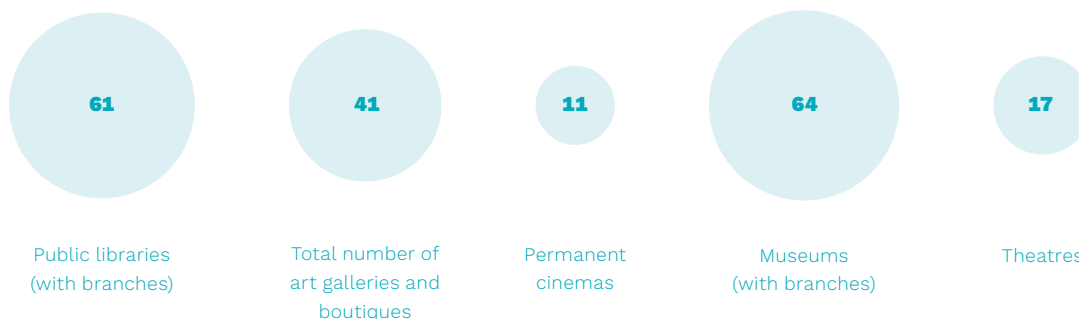
The city has been developing public transport for years not only because of traffic jams, but also in an attempt to ensure cleaner air—the network of connections has been optimized, all city buses meet the highest ecological standards (six have photovoltaic batteries on the roofs). In the center of the city there are 28.6 kilometres of bus lanes and joint lanes for buses and trams, which give them a privileged place in traffic. Also four interchange hubs with Park & Ride car parks with over 500 parking spaces, another 1.9 thousand parking spaces in the Paid Parking Zone, and 165 bicycle stations (Wavelo system) are to encourage car owners to resign from the currently used means of transport.

The Intelligent Transport Systems, which monitor public transport, and the Urban Traffic Control System (UTCS), which mainly regulates car and pedestrian traffic, help improve traffic management.

The city spends as much as 18 percent of its over five billion zlotys budget on transport. It is a deeply thought-out and well analysed decision, mainly related to the fight for improvement of air quality. Every four years, the Kraków authorities conduct research into the quality

**Fewer cars, better air quality, more green spaces—it was the needs of the residents that set the objectives for the city's development strategy in the coming years.**

## CULTURE



of life in the city. In 2014, among the most important aspects of the city's functioning, the residents indicated: communication, housing conditions and safety. Four years later, the priorities of the Kraków's inhabitants were completely different: all of them concerned ecology and health. 95% of respondents indicated clean air as the most important issue, 93% indicated green areas and the cost of living, and 91% the cleanliness of the city space.

Kraków's efforts to improve air quality (poor air quality is largely due to the city's location) can be described as pioneering: in 2016, the councillors adopted a total ban on coal burning in stoves from 2019. Between 2012 and 2018, a total of almost 21,000 furnaces were liquidated, and in 2018 alone—almost 4,000. Over the last four years, the city has spent over 265 million zlotys on smog control. The improvement of the quality of life in the city will also be supported by, among others, a special noise protection programme (e.g. replacement of tracks or construction of screens) and the development of a network of parks and green areas. Only in 2017 the city allocated a record amount in its budget—PLN 130 million to the purchase of land for new green areas—thanks to which, among others, the huge park Zakrzówek is being built.

The goals of the newly adopted Kraków Development Strategy "This is where I want to live. Kraków 2030" include the creation of as many as 70 new parks, including pocket parks. Kraków, which sets ecological trends, has also built a modern eco-incineration plant with an annual capacity of 220 thousand tons to burn municipal waste—it generates heat (meeting 10% of the city's demand) and enough electricity to meet the annual demand of city trams.

Kraków is one of the few large cities that has no problem with depopulation (in 2018 the population growth per 1000 inhabitants in Kraków was 2.7 and was significantly higher than the average for Poland). This is due to many initiatives. For example, the City Hall has decided to award 120% subsidies (the statutory rate is 100%) for the so-called cheap private kindergartens ("for 1 PLN"), which there are already 84 of. The city also has the most extensive network of childcare facilities for children under 3 years of age among the largest cities (next to Poznań and Wrocław)—nurseries, children's clubs, day caretakers. Every year about 1000 new places providing care for the youngest children in the city appear on the map of Kraków.

Kraków is also the most recognizable Polish tourism brand in the world. This is due to the unique monuments (St. Mary's Church, the Wawel Castle, the Main Market Square, Kazimierz quarter or the Crypt of Honour under the Church "on the Rock". Last year, the city was visited by 13.5 million people, including 9.65 million tourists. It is here that almost one third (about 4.3 million exhibits) of all museum collections in Poland are located, and the register of monuments includes 1207 objects. Only here, in the National Museum in Kraków, you can see live "Lady with an Ermine" by Leonardo da Vinci.

## HEALTHCARE\*

2017 | per 10,000 inhabitants

44

**beds**

24

**doctors**

\* data regarding  
Małopolskie voivodship

## NEW SPACE

Artur Paszko, President of Kraków Nowa Huta Przyszłości: “Investors are very interested in the Kraków Nowa Huta Przyszłości project. This year we will announce the first commercialisations on a 6-hectare property. We are looking for an investor for a life science research and development centre. It will also be a test for the market.

This visionary project is intended to give the city a boost of energy—its aim is to revitalise more than 586 hectares of post-industrial land in Nowa Huta—the project is huge due to the dispersed ownership and the number of plots—around a thousand or so. This strategic project is supposed to serve as a new impulse for the development of the entire city, not only business and science, but also culture and recreation. Part of the area, the so-called Błonia 2.0 (with an area of 40 hectares), is to be the centre of the largest outdoor cultural events, and Przylasek Rusiecki, where a bicycle route, volleyball pitch or a harbour with a beach are to be built, will be a place of rest (works around the marina are to start in 2019). The new Science and Technology Park Branice and the Logistic and Industrial Centre Ruszcza will occupy a significant part of the area.

The second of the city’s flagship projects for the future is Kraków-New Town. On 441 ha a zone friendly to high-rise buildings is to be created (Kraków—Płaszów/Rybitwy); in its eastern part it will be possible to locate high-rise buildings (up to 250 m).

The city has also great plans connected with the Kraków Airport project—it covers an area of 260 ha (Kraków-Zwierzyniec) and is a strategic project of metropolitan character. It includes, among others, the expansion and modernization of a Balice Airport: from a conference centre, through the science and technology park, to an exhibition centre and hotels.

The capital of Małopolska is a leader among regional cities in terms of the available office space. In 2018, the supply in the city exceeded 1.2 million sqm, and in four years it has almost doubled (in 2014 there were 714 thousand sqm of office space). However, the market is still far from saturated—at least 17 more buildings are under construction for office lease, totalling 260,000 sqm.

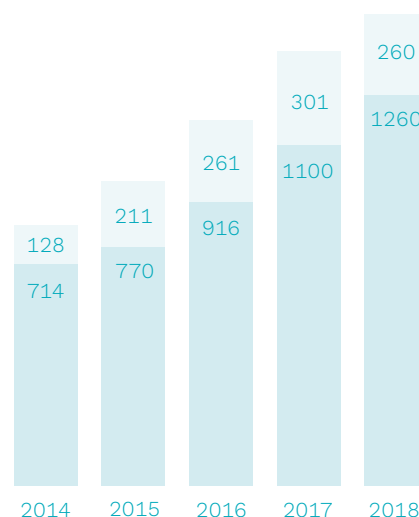
Investments in office space are supported not only by the development of the market, but also by local amenities. Over 64% of Kraków is covered by the local zoning plan (it includes 191 plans, of which 63 are being prepared), which is a kind of record in comparison to large cities (Warsaw—37%, Łódź—21%). This allows not only to shape the spatial order, but also makes it easier for potential investors to plan their investments, while limiting the risk.

**Błonia 2.0,  
economic activity  
zone—a modern  
city is being built  
in the city.**

### INVESTMENT AREAS

1287 ha

### MODERN OFFICE SPACE



- Area covered by the zoning plan (in thousands of m²)
- Usable area under construction (in thousands of m²)

## **A PLACE FOR SMALL AND LARGE INVESTORS**

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Assistance in investment activities is provided by the Investor Support and Innovative Economy Centre—a specialist unit of the City of Kraków, where competent employees provide assistance at every stage of investment. The Centre provides services to foreign and domestic investors, monitors the investment process of customers, advises investment recipients, maintains databases of municipal investment offers and promotes the investment offer of the city in the country and abroad. The Centre's services are addressed to all those interested in the development of business in Kraków—from small investments, through the locations of modern service centres, to large investment projects.

The Business Center in Małopolska (CeBiM) offers, free of charge, an integrated system of investor service (one stop shop), which deals with the comprehensive preparation of investment offers from the region of Małopolska and Kraków—it has several dozen properties for investment.

The leader providing support for the video games industry in Poland and a candidate for the leader in supporting companies operating on the Industry 4.0 market is the Kraków Technology Park. “The latter topic is an area of natural synergy between industrial companies from the Polish Investment Zone and technology companies in the park, creating a unique and fast growing ecosystem,” emphasizes Wojciech Przybylski, President of KPT.

Kraków Technology Park provides support for over 300 companies on a daily basis.

“We effectively help giants such as Comarch, Azoty Tarnów and Tauron, emerging global start-up stars such as Synerise and rising stars such as Autenti and Reality Games. The KTP implements a positive scenario of structural transformation of the Polish economy, from a low-cost model to a knowledge-based economy, technology and intellectual property produced in Poland,” Wojciech Przybylski enumerates.

KPT has, among others, a modern office and laboratory facility in the area of the Third Campus of the Jagiellonian University, which has become one of the most important places in the Kraków start-up ecosystem. Start-ups from the IT sector can count on the help of the Technology Incubator. Its results are impressive: out of more than 140 companies that it has helped to develop over 10 years, 80% still operate. The well-known start-up Autenti, within six months from its establishment, has gained 6.3 million zlotys from two investors, and Seedia has received 3 million zlotys from the investment fund Value. It is a good place for beginners without experience—it offers a wide and complete range of services—from infrastructure, through incubation and acceleration programs, consulting and training, to capital tools in the form of seed funds.

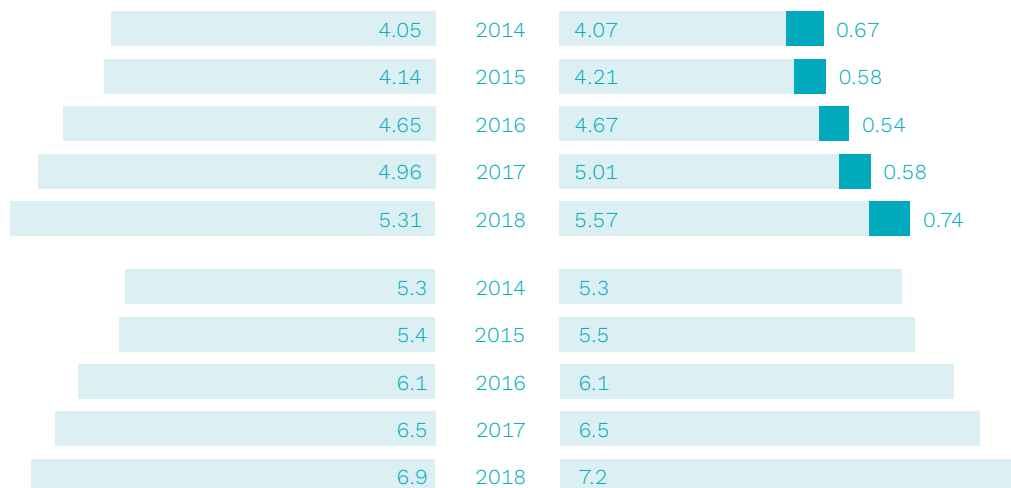
**It doesn't matter  
if it's an  
international  
corporation  
or a start-up.  
Every business  
will find its place  
in Kraków and will  
receive the support  
of specialized  
institutions.**

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues (in thousands PLN per inhabitant)

Expenditure (in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

2017

2018

**22**  
universities

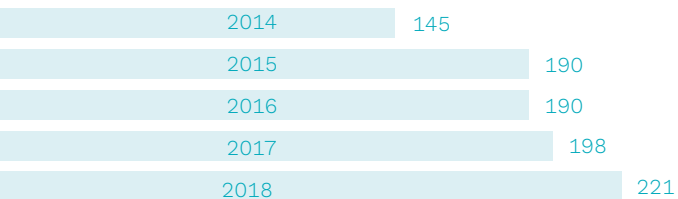
**144,349**  
students

**23**  
universities

**134,969**  
students

## BIKE ROUTES

(in km)



## ELECTRIC CARS

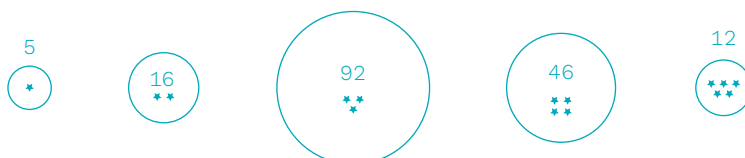
2018

**44**  
charging stations

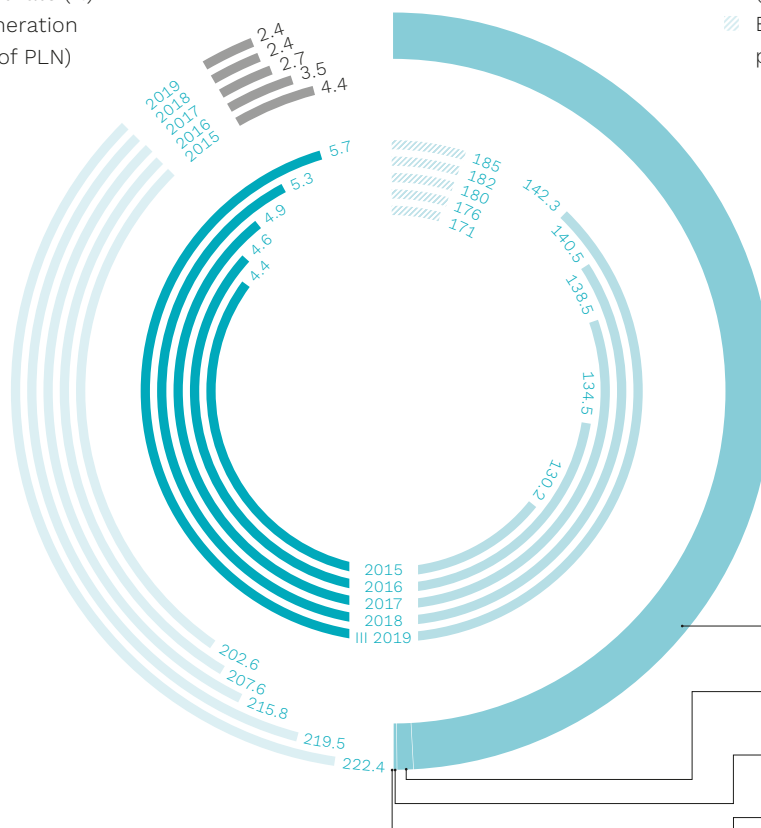
**HOUSING RESOURCES**

2017

2018

**9,606**125 flats per  
10,000 people**11,044**143 flats per  
10,000 people**Completed  
flats****60%****of the city is covered  
by green areas****HOTELS****136****hotels with  
conference facilities**

- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)











# ŁÓDZ

Voivodeship	Łódzkie
Mayor	Hanna Zdanowska
Area	293 sqm
Population density	2,354 sqm
Population	685,285
Granting urban rights	29.07.1423
Mirror reflection	Lyon, Manchester
Aspiration	Grenoble

## CONTACT DETAILS

Office for Economic Development  
and International Cooperation  
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+48 792 261 910

# A CITY OF NEW OPPORTUNITIES

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## **HANNA ZDANOWSKA, MAYOR OF LODZ**

We want to become the most resident friendly city in Poland. We invest in transport, public space and historic buildings. We have focused on cooperation with investors who want to co-create this proud metropolis with us. The proximity of Warsaw, which used to be a curse, serves us now as an impulse for development. Lodz is cheaper, more comfortable and more friendly. This is what distinguishes us.

## **ARTUR CHABOWSKI, PRESIDENT OF MABION**

Lodz is the dynamically developing heart of Poland. There is no denying that in recent years the city has changed dramatically, and considering the ongoing investments—this is only the beginning. As Mabion, we are very satisfied with the level of education at the local universities. University graduates are now the backbone of our company. In my opinion, the potential of Lodz is still underestimated.



## **CEZARY KOCIK, VICE-PRESIDENT OF THE MANAGEMENT BOARD, HEAD OF RETAIL BANKING AT MBANK**

mBank started its operations in Lodz and we are very happy here. Apart from a fairly large market of highly qualified employees, Lodz also has the energy needed for development. And, of course, it also offers lower operating costs and close proximity to the capital city. The city has changed a lot over the last 10 years. The infrastructure has improved and the office market is developing very dynamically.

## **KONRAD POKUTYCKI, CEO OF BSH**

The company BSH Household Equipment has been associated with Lodz for 25 years now, which is the best proof that it is worth investing in this region. I must mention that in this context the Lodz Special Economic Zone and the city authorities are doing an incredible job. Also the Technical University of Lodz and the University of Lodz cooperate with companies more and more frequently and willingly.



“Łódź owes its great potential to the fact that it is not trying to become similar to other cities, but it focuses on drawing benefits from its unique potential and characteristic buildings, which other Polish agglomerations do not have. This builds its attractiveness. People looking for an alternative to crowded Warsaw or Kraków can come here. The city is also on the short list of foreign investors who have been feeling great in Łódź for several years,” says Krzysztof Witkowski, President of Virako, investor at Monopolis, one of the most famous revitalization projects in Poland.

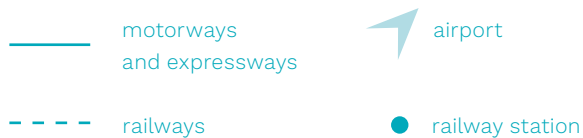
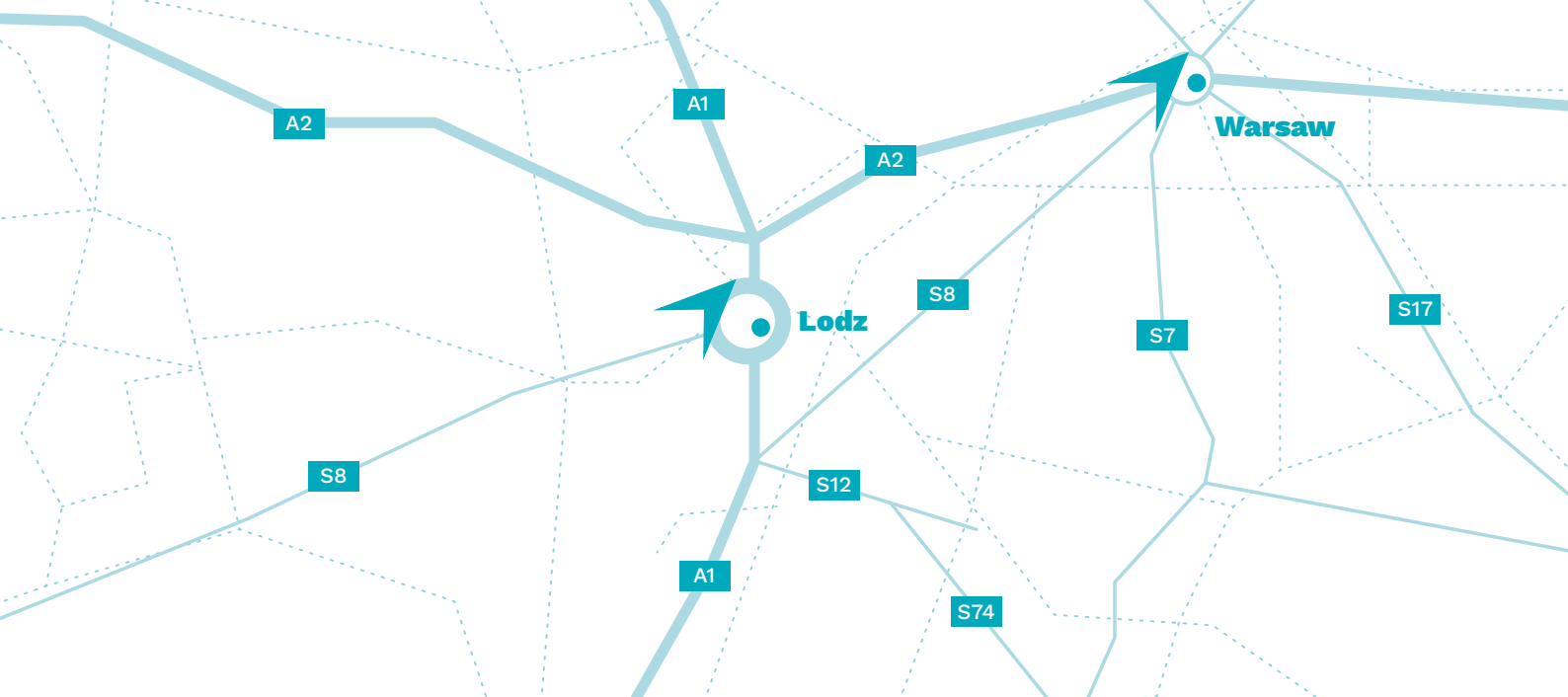
The first years of political and economic transformation were a destructive time for Łódź. Collapse of the textile industry put the city on the verge of economic disaster. New investments, however, are changing the city’s image rapidly and more and more investors see its advantages. Today, Łódź is one of the most important business services centres (BPO) and modern factories of e.g. household appliances are established around the city, for instance in the Łódź Special Economic Zone and the IT sector is developing dynamically. Łódź universities do their best to ensure a proper pool of human resources and they are improving the effectiveness of their cooperation with entrepreneurs. At the same time—due to its location in the very centre of Poland, at the crossroads of major communication routes, Łódź is becoming one of the main points on the logistic map of the country, it also has a chance to become a significant transfer hub of the New Silk Road. At the same time, the average salary here is lower than in the nearby capital city—in 2018 it amounted to PLN 4.6 thousand. And the unemployment rate—5.9%—shows that the city has not yet exhausted all its reserves.

Today’s Łódź is a city of constant change. It is here that the largest public investment in Europe—the construction of the New Centre of Łódź is being carried out. The projects that will be implemented in the NCK have been planned until 2030, and their total cost may exceed PLN 3 billion, excluding private investments. After the revitalization process is completed, this 100-hectare post-industrial area will be used for commercial, public and cultural purposes.

This massive transformation of the city would not have been possible without EU funds. According to the CSO report, in terms of the value of investments co-financed with EU funds (over PLN 7.2 billion), Łódź ranked second in Poland, just after Warsaw.

The key factor influencing the direction of development is the identification of priority industries for the city in the Strategy for the Integrated Development of Łódź 2020+, which is related to attracting investors. The identified industries should create added value and offer good quality jobs, i.e. BPO, SSC or IT sectors.

**Over the last thirty years Łódź has undergone a transformation from a centre on the verge of collapse, ashamed of its poverty and with no will to fight, to a proud, dynamic and changing metropolis.**



253.7 km

hard surface public  
roads per 100 km<sup>2</sup>

## A VERY GOOD LOCATION

A great advantage of Lodz is its central location. It lies at the junction of the A1 and A2 motorways, which are part of the trans-European transport network (TEN-T) connecting Western and Eastern Europe and the Baltic States with the southern part of the continent, the S8 expressway leading towards Wroclaw.

Lodz also has good railway connections with the largest cities in Poland, and its pride is the underground Lodz Fabryczna station. Opened in December 2016, the facility cost nearly PLN 1.9 billion. Until 2022, under the city centre a railway tunnel will be completed with new underground stops, which will make Lodz the central transit point on the railway map of Poland. Equally important is the direct rail freight connection to Chengdu in China, which is part of the New Silk Road.

Residents of Lodz can use two international airports. The Wladyslaw Reymont International Airport is located about 10 minutes away from the city centre by car. Whereas 130 km further, in Warsaw, there is the biggest airport in Poland—F. Chopin Airport.

## THE INVESTOR IS NEVER ALONE HERE

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Lodz has a simple and effective way to attract investors. The office of economic development and international cooperation takes care of everything—this is the name given to the unit of the City of Lodz, whose main task is to provide one-stop-shop services to investors. Each of them receives its own investment tutor, who—supported by officials and specialists—has a complete set of information on the availability of staff by specialization, as well as information regarding the availability of real estate, warehouses and office space. The unit prepares a list of necessary permits and procedures for obtaining them, it also has knowledge about possible public aid and its sources. The unit currently employs over 30 people.

„In 2018 Lodz has been evaluated by ABSL as the second self-government in Poland that best supports the BSS sector. The main tool is the “Youth in Lodz” programme, which has been implemented for several years now and which consists of activities aimed at helping employers to find the right talent pool, such as: co-financed internships, scholarships, trainings and promotional support,” says Michał Śmiechowicz, director of the economic development and international cooperation office of the City of Lodz.

The city also supports entrepreneurs in finding suitable areas for investments. Since the city's own resources are limited (currently 182 644 sqm) and there are not many areas left for sale, the local government has prepared a project addressed to private property owners. The Lodz Special Economic Zone also has its offer for investors. „We guarantee professional service and substantive support at every stage of the investment. We invest in technologies important for modern business, such as 5G, which we implement together with the Technical University of Lodz. Besides, this region is a great location with a very well-prepared infrastructure, interesting investment areas and a great human potential,” explains Marek Michalik, President of the Lodz Special Economic Zone.

The city also supports smaller companies. The Bionanopark or the Lodz Regional Development Agency and the business incubators established by them are institutions that perfectly match the expectations of investors. The Lodz Business Incubator offers office space on preferential terms, assistance in establishing cooperation with business networks and scientific institutions, training and consulting. In turn, the offer of the Lodz Bionanopark includes cooperation of enterprises and institutions from the new technologies sector.

„The location in a science and technology park was important for our company. Such institutions are well known all over the world, so the very fact that we have our headquarters here, to some extent, makes us credible to foreign customers. It is also worth mentioning great cooperation with the managers of the Bionanopark,” explains Adam Trojańczyk, Co-Founder & CTO Tap to Speak, CEO of the Black Code Software.

**Entrepreneurs planning to invest in Lodz can count on comprehensive assistance in carrying out their investments. The city cooperates with them at every stage of its implementation.**

## TAILOR-MADE STAFF

Lodz is constantly changing. From a city famous for textile industry it has transformed into a modern business services centre (BPO/SSC, IT and R&D), a place friendly to the logistics industry, household appliances production and electronics industry, as well as biotechnology and modern textile industry. It is also a centre of creative industry.

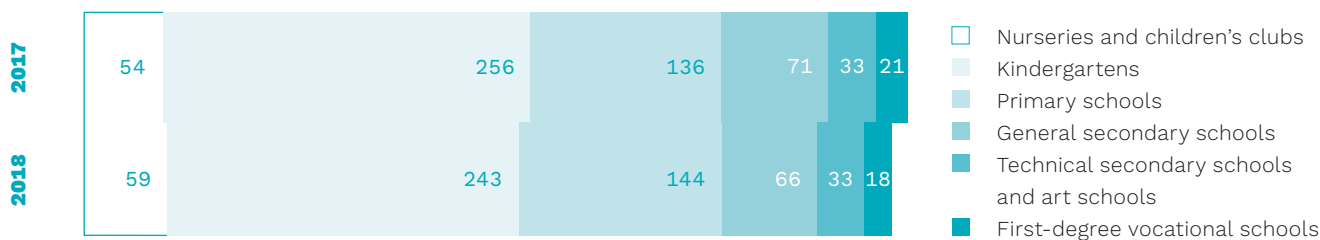
The dynamic development of these industries is facilitated by appropriately qualified staff—Lodz is one of the most important academic centres in Poland. There are 22 universities and colleges in the city, 6 public and 15 non-public ones. Every year over 73 thousand students attend the Lodz universities, including nearly 5 thousand foreign students, and about 20 thousand graduates receive their diplomas. The University of Lodz offers 86 faculties and over 167 specialisations. Thanks to its cooperation with foreign universities, it is possible to study here in fields whose completion guarantees obtaining diplomas of two universities. Within the framework of the Socrates/Erasmus programme, students of the University of Lodz can continue their studies in 32 European countries.

The Technical University of Lodz has been ranked among the leading technical universities for many years now. It is the winner of the competition for the most innovative and creative university in Poland in creating career prospects. Other public universities operating in the city include, among others, the Medical University, the Film School, the Academy of Music and the Academy of Fine Arts.

Both the Technical University of Lodz and the University of Lodz provide training in close cooperation with companies operating in the area. „Contacts with entrepreneurs allow us to introduce changes in curricula and create new educational paths,” says Prof. Sławomir Wiak, Rector of the Technical University of Lodz. „There are many examples. In the academic year 2019/2020 we launched dual education in cooperation with the company BSH Sprzęt Gospodarstwa Domowego. Apart from classes at the university, students spend at least one day a week at BSH. We also conduct dual studies in the

**The strongest asset of Lodz? Apart from the location and the authorities open to cooperation, well-educated, creative people with foreign language skills.**

### EDUCATION





field of management and production engineering, as well as design. Students of the Technical University of Lodz acquire skills in many companies in Lodz.

For example, Airbus Helicopters, which opened a design office in Lodz, employs our graduates, and we have launched a special English language course to meet the needs of the company.

The Technical University of Lodz also cooperates with such companies as Veolia Energia Lodz, Corning Optical Communications, Wiel-ton, Tubądzin, Mabion, Apator and IT sector, which are united in the ICT Polska Centralna Cluster, created from the university's initiative.

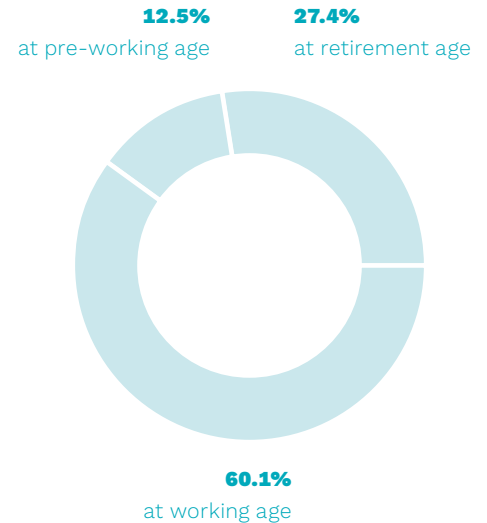
"Long-term cooperation between the university and business allows to exchange experience, enables to identify the needs and expectations of employers and lets adjust the educational offer to them," says Prof. Antoni Różalski, Rector of the University of Lodz. The university, together with Accenture and mBank partner companies, has opened a Banking and Digital Finance faculty, and with Infosys and Fujitsu companies—a Linguistics for Business Faculty (L4B). "We believe that nothing is impossible and that it is worth learning at every stage of life. That is why we have created the IT Graduate project for 500 graduates of the University of Lodz. Our goal is to increase their IT competence. We lack about 50 thousand IT specialists on the Polish market. Project participants will be able to choose one of four paths of further development: programmer, graphic designer/UX specialist, database administrator or availability auditor," adds profesor dr hab. Antoni Różalski.

The city also makes sure that the young people stay here for longer. The "Youth in Lodz" programme, which has been implemented for several years now, supports the professional career development of students, encouraging young people to plan their future in the city. At the same time, it helps local entrepreneurs and investors in attracting highly qualified staff.

However, profiling of education for future careers starts at secondary level. This year, the Automation and Robotics Technical School is going to be opened.

"There is no other such school in Poland. Firstly, the governing body of the technical secondary school is the Education Zone, a company in which 75 percent of shares are held by the State Treasury in the form of the Lodz Special Economic Zone, and the remaining 25 percent belong to private companies—10 percent to Miele Technika and Ceramika Tubądzin each, and 5 percent of Delia Cosmetics. Secondly, the technical school will offer a specialization which is not yet included in the classification of professions of vocational education. Automatics and robotics can be found at universities, but not in secondary school," explains Wiesław Zewald, President of the Education Zone.

## POPULATION



## A SURPRISING CITY

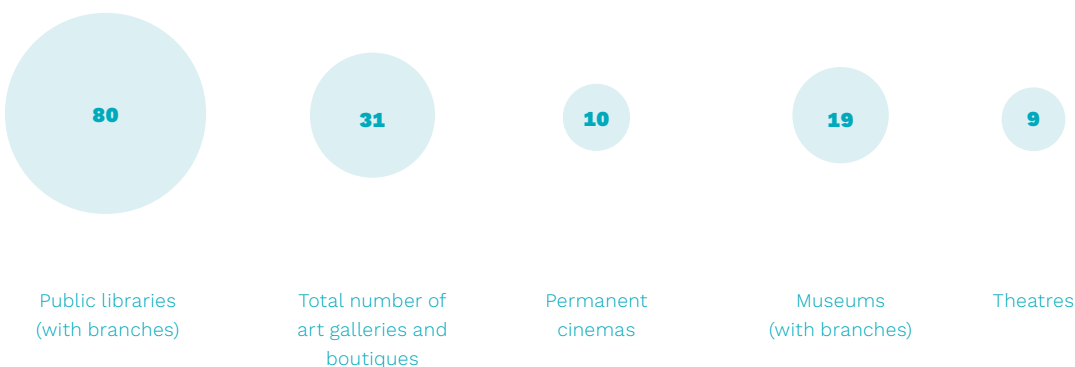
As the latest research on the quality of life in the city commissioned by the magistrate shows, the most frequently mentioned advantage of Lodz is its geographical location—it is simply close to any destination from here. The Lodz Agglomeration Railway is also extremely important—the city itself are also important—streets in the city centre are being rebuilt, tram lines are being renovated. A few years ago, the Centrum Tram Station, called in Lodz the Stable of Unicorns, was opened, connecting the two main arteries of the city: the W-Z Route and the Lodz Regional Tram.

In Lodz, a large-scale revitalisation programme is being carried out, not only in terms of the area, but also covering several dozen projects in various fields: social, spatial and economic. „We started with single investments—transformations, and now we are bringing whole quarters back to life. The revitalisation programme we are currently conducting in Lodz is the largest undertaking of its kind in Poland,” says Joanna Skrzydlewska, director of the revitalisation office in the Lodz magistrate.

The New Centre of Lodz is becoming a symbol of the city—on almost 100 hectares, surrounded by unique recreational areas, modern housing estates, office buildings and cultural and commercial facilities are being built, creating attractive spaces not only for residents, but also for investors and tourists. The fact that the city is becoming more and more attractive for tourists is confirmed by the results of the Best in Travel 2019 ranking recently announced by Lonely Planet, which indicated the most recommended destinations in the world. Lodz was ranked second.

**Lodz is not ugly or boring at all. It is extraordinary. Green, one of its kind and still surprising. The inhabitants of Lodz assess the living conditions in their city as better and better and the majority of them want to stay here for good.**

## CULTURE



Few agglomerations in Poland can boast of so many parks (there are over 30 of them with a total area of 500 ha) as well as the largest forest complex located within borders of the city. Łódź was the first city in Poland to create woonerfs—inhabitant-friendly places with calm traffic, which the city is becoming famous for. And the number of attractions is increasing. In the revitalised EC1, the most modern planetarium in Poland has been built, there is also the Science and Technology Centre here whilst the National Centre for Culture and the Centre for Comics and Interactive Narration are being established.

The offer of leisure time activities is attractive. In recent years, Łódź has become famous for its big festival organized in the urban space—Light Move Festival, which is attended by several hundred thousand spectators every year. Festivals devoted to various fields of culture and art—Łódź Design Festival, Fotofestiwal, Transatlantyk, Festival of Good Taste, Łódź of Four Cultures Festival, International Festival of Comics and Games, Soundedit and many others—are known abroad. The city has also become one of the most important points on the Polish map of concert events. All thanks to the Atlas Arena, which has hosted such stars as Shakira, Justin Bieber, Elton John, Sting, Aerosmith, Rod Stewart, Eric Clapton, Sade, Lenny Kravitz, Depeche Mode and Muse. It also hosts major sports events, such as World League volleyball matches.

Nobody can complain about the availability of trade. With a retail space exceeding 550,000 sqm and a saturation of 567 sqm per thousand inhabitants, Łódź is one of the leading Polish cities. The most famous shopping facility is Manufaktura in the revitalized Izaak Poznański factory, although it is more of a cultural and entertainment space and commercial functions are only a part of the offer.

The city also relies on pro-ecological activities. Cyclists can use 157 stations and 1,584 city bikes and 200 kilometres of cycling routes. This year, 150 electric scooters have appeared in the city, you can also rent 50 electric mopeds. Programs have been introduced to replace and modernize heating installations, which are often in very poor condition, and thermal modernization of old residential buildings has also been taken care of.

Łódź is also implementing many smart city solutions. The city already has an area traffic control system in place, including intersection monitoring, remote control of traffic lights, driver information boards and passenger information system. Another smart solution used in public transport is an electronic system for settlement of tolls and proximity payments with payment cards. In order to enable the residents to suggest new solutions to the authorities, the Vox Populi platform was launched, using which they can cast their votes in important municipal matters.

## HEALTHCARE\*

2017 | per 10,000 inhabitants

52 27

**beds**

**doctors**

\* data regarding  
Łódzkie voivodship

## OFFICES AND WAREHOUSES: AN IMPORTANT PLAYER

The latest report entitled Office Market in Lodz 2019, prepared by OPG Property Professionals in cooperation with the Department of Investment and Real Estate at the University of Lodz, shows that there is already 505,000 sqm of office space in Lodz (as at the end of 2018). „Last year, for the first time in the history of the city, A-class office buildings constituted the majority of the available space. And they have the lowest vacancy rate,” says Monika Hryniewicz, Head of Leasing OPG Property Professionals. Class A buildings already occupy 275,000 sq.m, which constitutes 52% of the total office space in the city.

According to the report, 78.4 thousand sqm was under construction at the end of 2018. Still in 2019, such office buildings as Brama Miasta, Imagine, Lodz.Work or Monopolis will be opened, and in the following years Hi Piotrkowska 155 or Textorial Park II. „Vacancy rates with stable supply, good access to qualified workers and lower rental rates than in other cities of similar size are a good portent for stable development,” says Michał Styś, President of OPG Property Professionals. A class space will cost between EUR 11 and 15.5 sqm/month whilst in the lowest standard office buildings located on the outskirts the prices are between EUR 5 and 7.5 sqm/month.

The hotel offer is also important for the development of business, and it is growing year by year. There are 34 categorized hotels in the city, offering a total of more than 3,200 rooms, including 7 four-star, 16 three-star, 9 two-star and 2 one-star facilities. Grand Hotel, which is currently being renovated, is to become a five-star hotel.

Since the location helps execution of logistics projects, the largest logistics and industrial park in this part of Europe is being built in the eastern part of the city, close to the A1 motorway. It is 181 ha of buildings with halls where not only logistics but also industry will be located. About 7 thousand people will find a job there. In 2018, the first investment was launched in the New Industrial District of Jędrzejów in Lodz: the BSH logistics centre with a private railway siding and the multi-tenant building where the companies Compin and Whirlpool have located their operations. The construction of two buildings, in which Smyk and Media Expert have located their central warehouses, is nearing completion (its warehouse is already in the process of being equipped).

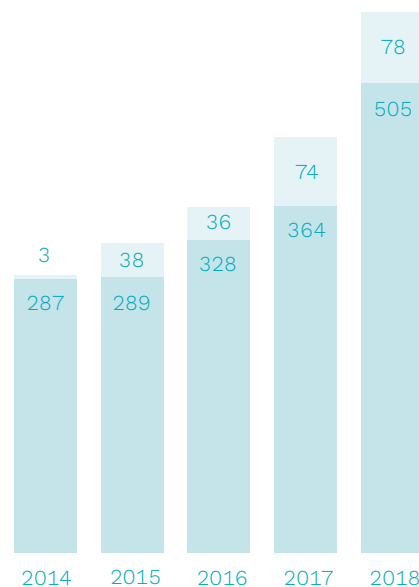
Last year, developers delivered over 730,000 sqm of modern warehouse space in the entire voivodship. „Lodz and the entire region guarantee us access to top-class employees and very good infrastructure. We are also very grateful for the involvement of local authorities who supported the construction of the new Amazon e-commerce logistics centre near Lodz,” says Steven Harman, Vice-President for Operations Amazon in Europe.

**The office market in Lodz has exceeded the magical threshold of half a million square meters. It offers mostly modern A-class space.**

**Area covered by the zoning plan**

**21.7%**

### MODERN OFFICE SPACE



■ Area covered by the zoning plan (in thousands of m²)  
■ Usable area under construction (in thousands of m²)

## ON AN INNOVATIVE BOAT

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XOXO WiFi is a start-up from Łódź that has created a mobile router, thanks to which travellers can avoid high roaming costs and get access to the Internet. The company is located in the Bionanopark Incubator. They started from the Young in Łódź competition and today their services are available not only in Europe, America or Australia. They are also available in the farthest corners of the world—in Fiji, Madagascar, Kyrgyzstan and Nepal.

“We came up with this business idea during one of our Asian travels. At that time, we had a problem with access to the network, and we had to stay in touch with our employers, despite our holidays. We were looking for such a service, but it turned out that there wasn't any. So we decided to create it,” recalls Katarzyna Przybył, co-founder of XOXO WiFi.

Today they can be sure that the most valuable thing was not the success itself but the participation in the competition and access to experienced specialists and businessmen. “For young people starting their adventure with their own business, the opportunity to talk and analyze their ideas with people from the industry is really invaluable,” says Katarzyna Przybył. “On top of that, a package of training courses, such that do not waste time, on the contrary, each thoughtful and conducted at a high level.”

It is not enough to say that start-ups are the driving force in Łódź now. In Bionanopark alone, over 140 companies have used the offer of the incubator operating there so far, and several dozen are in the incubation period.

The Łódź Special Economic Zone is also very active in accelerating start-ups. The Startup Spark 2.0 programme has just started there, which is to offer support to 66 young and innovative companies. The Zone ensures participation of 12 business partners in the project and almost PLN 14 million will be allocated for the development and creation of innovation by start-ups.

„Start-ups are an alter ego of corporate R&D departments. They are an additional channel for introducing innovations to large companies, presenting a fresh approach. The combination of creative ideas with the knowledge and experience of large companies results in the creation of technologies that are able to change reality. The future of business means close cooperation with startups,” says Agnieszka Sygítowicz, Vice-President of ŁSSE.

Another important point on the start-up map is the Art\_Inkubator in the Łódź Art Factory. So far, 58 companies from the creative industries have found their place here, including designers, architects, photographers, creative agencies, filmmakers and graphic designers. Gathering so many different entrepreneurs under one common roof gives unlimited possibilities of cooperation and networking.

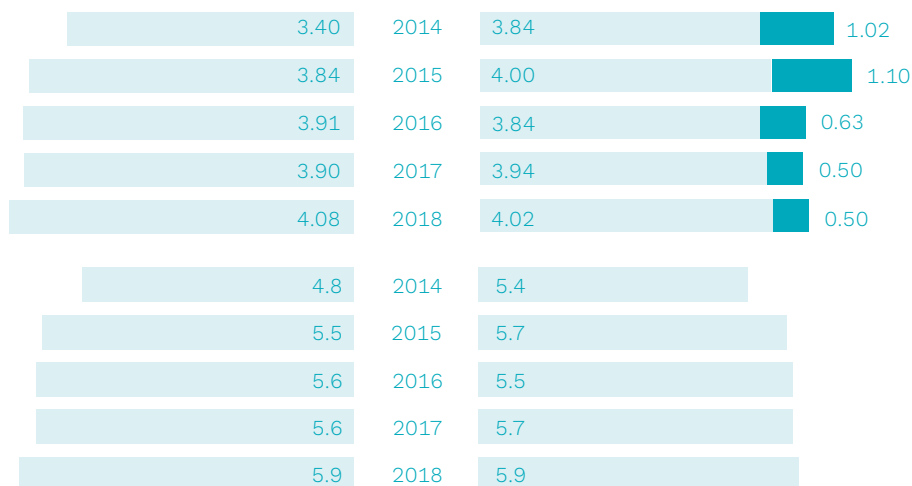
**Start-ups, creative industry, coworking zones—fashionable words that define what entrepreneurship is today. And Łódź supports young people in developing their talents and implementing their ideas here.**

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues (in thousands PLN per inhabitant)

Expenditure (in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

2017

2018

**20**  
universities

**73,961**  
students

**22**  
universities

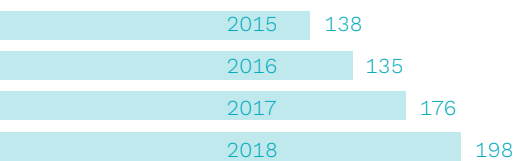
**72,019**  
students

## BIKE ROUTES

(km)

## EXPENDITURE ON CITY REVITALIZATION

2018 (in thousands PLN)



**204,835**



**HOUSING RESOURCES**

2017

**3,700**54 flats per  
10,000 people

2018

**4,600** Completed  
flats67 flats per  
10,000 people**11.42%**of the city is covered  
by green areas**HOTELS**2  
★9  
★★16  
★★7  
★★**37**hotels with  
conference facilities

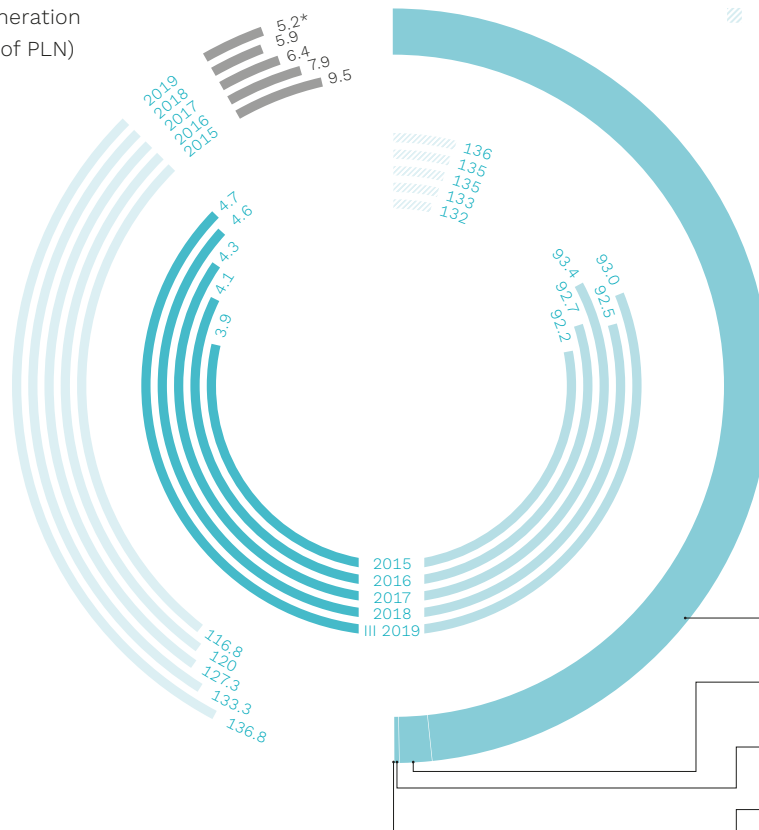
- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)

**COMPANIES IN THE CITY**

- Enterprises operating in the city (in thousands)
- ▨ Enterprises operating in the city per 1,000 inhabitants

**7,685**  
new companies were  
registered last year

**13.7%**  
of all the companies  
registered are  
foreign companies

**COMPANIES ACCORDING TO EMPLOYMENT**

- 95.8%** of micro companies (up to 9 employees)
- 3.5%** of small companies (10–49 employees)
- 0.6%** of medium-sized companies (50–249 employees)
- 0.1%** of large companies (over 249 employees)

\* Data as of the end of June 2019

Sources: Central Statistical Office (GUS), survey conducted in the city, own sources









# LUBLIN

Voivodeship	Lubelskie
Mayor	Krzysztof Żuk
Area	148 sqm
Population density	2,358 people per sqm
Population	339,682
Granting urban rights	13.08.1317
Mirror reflection	Ghent, Cluj, Vilnius
Aspiration	Eindhoven, Graz, Munich

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# LUBLIN ON A RISING TIDE

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**KRZYSZTOF ŻUK, MAYOR OF LUBLIN**

Lublin is experiencing one of the best periods in its history. In the last decade we have built a modern city, recognized as one of the Polish cities of the future by the renowned “fDi Magazine”. Lublin is a modern economic ecosystem based on such pillars as innovation, human capital, quality of life and business, cost-effectiveness and smart development in line with the smart city concept. I encourage you to invest in Lublin.

**BEATA STELMACH, PRESIDENT OF PZ-ŚWIDNIK,  
VICE PRESIDENT OF LEONARDO HELICOPTERS**

Lublin and its neighbouring towns are one of the most attractive regions in Poland for foreign investments. Leonardo Group discovered the business potential of this region over 20 years ago. Over the years, the role of PZL-Świdnik in the Leonardo structures has been growing thanks to the experience and competence of the employees from Świdnik.



**PIOTR ROMANCEUK, VICE PRESIDENT OF LUBELLA COMPANY**

Lublin is a region which definitely encourages investments. Thanks to its traditions, location in the centre of a significant agricultural region and infrastructure, Lublin is an important, business-friendly centre for the development of the food processing industry. As a producer that is strongly connected with the region, we can confirm that cooperation with local, trusted partners brings the expected benefits to all.

**MARCIN STANISZEWSKI, PRESIDENT OF SDS OPTIC**

Lublin is a very dynamically developing city, both in terms of infrastructure and access to facilities improving the quality of life of its inhabitants. It is an excellent choice for investors looking for lower operating costs. Apart from financial considerations, we can also see a huge educational potential here. The city abounds in well-educated scientists.



“Lublin has become synonymous with rapid promotion and development in practically every area of social and economic life,” says Mariusz Sagan, Director of the Strategy and Entrepreneurship Department at the Lublin City Hall.

In the ranking “Investment attractiveness of voivodships and sub-regions of Poland” (Institute for Market Economics) Lublin sub-region is ranked 10th among over 70 Polish subregions in terms of attractiveness for modern services industry and 9<sup>th</sup> for technologically advanced activity. This is in line with the development strategy of the Lublin local government, which considers information technologies, modern business services, biotechnology and pharmacy, as well as the automotive and food processing industries to be the most promising specialisations.

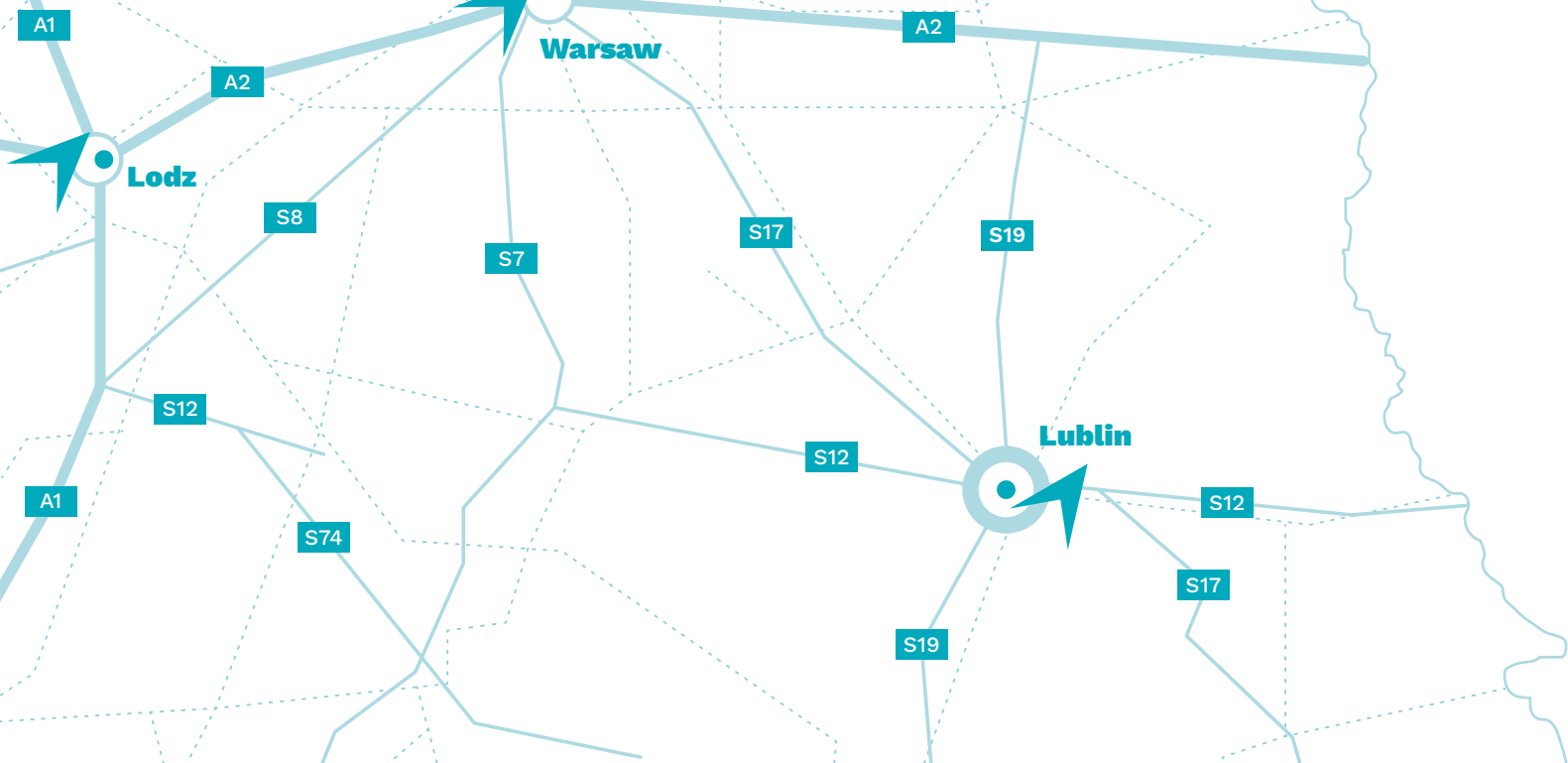
The fastest developing sector in the city is the business services sector. Currently (data for 2018 provided by ABSL consulting company), there are 64 BPO, SSC, IT and R&D centres in Lublin, more than half of which were established after 2012. In total, they employ over 7 thousand people, i.e. almost three times more than before 2012. IT services are crucial from the point of view of the city authorities.

“The choice of Lublin as the location of our first office in Poland was determined by several factors,” says Jarosław Diatczyk, member of the Management Board of DataArt Poland, a company which opened its software development centre here in 2014. “Good access by transport was very important. We have offices and customers in European countries, and the opening of the airport meant we could travel easily. Besides, Lublin is an academic, multicultural city, full of young, educated people, with a creative approach to life and work. High quality human capital is one of the biggest assets.”

Fast development is a consequence of the strategy adopted by the authorities in 2010, which aimed at strengthening the economic potential of Lublin. It allowed to change the image of the city and to rebuild it economically, after it had been strongly affected by the systemic transformation. The local authorities decided to turn Lublin's weak points into its strengths. Insufficient development of traditional, labour-intensive industry gave way to the development of an economy based on new technologies, knowledge and skilled workers. The location in the East of Poland, previously treated as a limiting factor, has become an opportunity, for example, to create an export hub connecting the East and West of Europe.

“In less than a decade, Lublin has made a great progress,” says director Mariusz Sagan from the Lublin City Hall. “But we want to go further. We no longer want to catch up with other Polish cities. We want to outperform them. With favourable economic situation, good management and the use of optimal strategy, we will enter the first league of European medium-sized metropolises.”

**It is the largest economic, academic and cultural centre of Eastern Poland. The city is developing dynamically, and its growing attractiveness is determined by the combination of many positive phenomena, such as pro-investment activity of the local government.**



317.4 km

**hard surface public  
roads per 100 km<sup>2</sup>**

- motorways  
and expressways
- - - railways
- airport
- railway station

## ON THE TRANS-EUROPEAN ROUTE

Lublin is the largest transport hub of eastern Poland. The trans-European transport corridor Via Carpatia, which connects northern and southern European countries (from Greece to Lithuania), goes through the city.

Thanks to the modernisation and expansion of the expressway network (S12, S17 and S19) and the construction of a ring road, the city has become much more accessible. In 2020, the entire S17 route connecting Lublin with Warsaw is to be completed. An important point is the Lublin Airport, which provides connection with the capital city and quick access to the most important cities and transport hubs in Europe. The airport is located less than 15 kilometres from the city centre. Railway connections, including the line connecting the city with Warsaw, are also being modernised, so that the journey between these cities will be reduced to 90 minutes.

Due to its location, Lublin has convenient connections with border crossings—with Ukraine in Dorohusk and Hrebenne and with Belarus in Terespol.



## A DENSE SUPPORT NETWORK

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"I am very satisfied with operating in the Special Economic Zone "Euro Park Mielec", in the Lublin subzone," says Jan Kidaj, President of Aliplast, a company producing aluminium profiles, including window profiles. "The areas are developed, we can see a friendly attitude of the administration towards business when dealing with the necessary issues."

Although the Lublin subzone itself does not have any vacant areas (there was no need to expand it after the introduction of the Polish Investment Zone program in 2017, thanks to which every company investing in any part of the city can count on the support once available in SSE), the experience of Aliplast reflects well that the Lublin self-government cares for the economic development and is open to the needs of investors. A few years ago, specialised units were established in the city hall to provide services to entrepreneurs. Each company has a project manager who helps it both at the stage of preparing and conducting the investment. However, this is not the end of cooperation—entrepreneurs can count on various types of support for business development, from assistance in organizing industry meetings to facilitating contacts with universities.

These activities are appreciated—in the report "Antal—Business Environment Assessment Study", which was published in the spring of 2019 and which presents the investment potential of eight Polish cities, Lublin ranked the highest in the category "Public administration support". The companies operating here appreciated not only the activities of the administration in the field of business support, but also the ease of communication with the representatives of the City Hall. This proves that building partnership relations between entrepreneurs and self-government brings results.

Other business support institutions operate in the city, including business incubators and technology transfer centres at universities, development agencies and associations or many industry clusters. The key to creating business ecosystems is the idea of Lublin Economic Highlands. It is the creation of cluster links, which are to foster the development of industries presenting the greatest potential in the region. The stakeholders include academic centres, public authorities, business environment and NGOs.

The Lublin IT Upland (LWIT), which brings together the entire industry, is of particular importance. "We cooperate, among others, with universities—we organize meetings and lectures for students, presenting them with IT issues from the practical as well as business side. We take part in numerous conferences and events organized by the IT environment," says Katarzyna Wolska, HRM specialist at Asseco Business Solutions. Apart from the IT Highland, the city also has a Medical Highland, Biotechnology Highland, Automotive Highland, Machine Highland and Aviation Highland.

**Lublin has managed to create an effective business development support system by, among others, ensuring partnership relations between entrepreneurs and local government.**

## AVAILABLE PROFESSIONALS AND TECHNICIANS

Lublin is the largest city in eastern Poland. It is inhabited by nearly 340 thousand people, and in the entire Lublin Metropolitan Area (i.e. the city and surrounding communes) there are over 600 thousand people. If we take into account the areas located within one hour's drive from the city—there is a total of over 1.2 million people here. Lublin is a young city, almost half of the population is under 40 years old, while 60% of the population is at working age. The unemployment rate in April 2019 amounted to 5.4%.

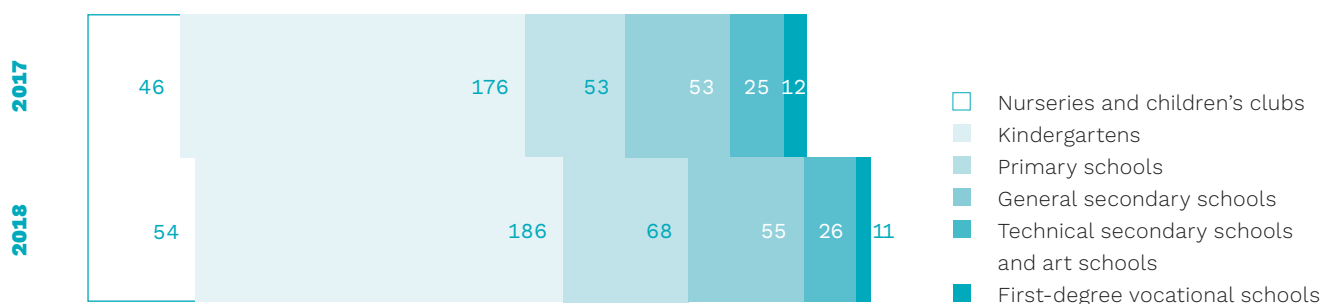
Lublin is also the largest academic centre in the eastern part of Poland. There are 9 universities here (including a Medical University and a University of Technology), which educate about 65 thousand students. 10 percent are foreign students, which is the highest rate of internationalisation of universities in Poland. Every year nearly 18 thousand graduates leave them. As many as 91% of all graduates speak English, 31% speak German, and 20 percent Russian.

For ABM Greiffenberger Polska, manufacturer of electric motors, the availability of personnel was the main element determining the location of the investment in Lublin. "Different locations across Europe were considered, including the Czech Republic, Hungary, Italy and Austria, but in most of them there is a shortage of employees with high technical and engineering skills. In the Lublin metropolitan area, the availability of people with such skills profiles is still high," says Robert Bronisz, Vice-President of the Management Board, Plant Director at ABM Greiffenberger Polska.

"Looking for a place for our new location, it was important for us to have access to people who speak German. It turned out that there are many of them in Lublin," says Justyna Daniel, site manager at Concentrix (formerly Convergys). This American company from the

**High quality human capital is a very important asset of Lublin. Cooperation between local universities and business helps to prepare employees for the needs of the labour market.**

### EDUCATION



business services sector in Lublin currently employs about 500 people. The BPO industry, which is developing here, has already created an ecosystem of specialists whose services can be used and on the other hand, the competition for employees is not so strong yet.

More and more people decide to stay in Lublin after their studies, because they can work here professionally. This means that employee turnover in companies, which is an important indicator for employers, is lower than in other metropolitan areas.

Such opinions are confirmed by the research—in the aforementioned study by Antal Lublin, Antal Lublin was ranked second, together with Tri-City, in the category “Educational potential, understood as the availability of future employees” and a leader in the category “Employment potential”, showing the availability of already trained staff.

“In the world or even in Europe you can find places with much lower labour costs. For us, however, the most important aspect is the ratio of skills to earnings, and in Lublin this ratio is the best in the country. In our plant we need not only hands to work, we need people who have both hands and a head, i.e. knowledge, qualifications and willingness to engage in work,” says Robert Bronisz, the director.

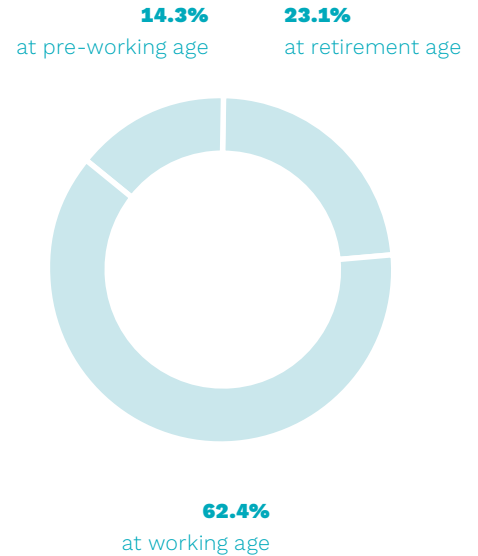
Because Lublin has ceased to be a city that attracts investors with low wages—the level of wages is about 97% of the average for the whole of Poland and 73% of average wages in Warsaw. What counts is the high potential of human resources and high quality of life. The city pays a great deal of attention to the cooperation between universities and business, both in terms of knowledge and technology transfer, as well as the adjustment of education to the needs of the labour market. A good example is the Faculty of Economics of Maria Curie-Skłodowska University (the Maria Curie-Skłodowska University, UMCS), where, among others, two new courses with a practical profile have been launched, which perfectly respond to the challenges of modern economy—logistics and economic analytics.

“As part of the standards developed in the project Synergia, the university organizes internships for students in specific, appropriately selected companies, and business representatives are invited to conduct classes, lectures and workshops,” says Prof. Zbigniew Pastuszek, Dean of the Faculty of Economics of the Maria Curie-Skłodowska University. The Faculty has a Council of Entrepreneurs, with which all substantive changes in educational programs are consulted.

Needs of the labour market are already taken into account at the secondary level of education. At present, in two schools run by the city of Lublin, apprenticeship is provided in a dual system. These are the Building Schools Complex and the Craft and Entrepreneurship Schools Complex (where e.g. car mechanics are trained).

## POPULATION

2018



## A GOOD PLACE TO LIVE AND WORK

The city has become such an attractive place to live that in recent years it has managed to stop the outflow of talents. Today it is the other way around, university graduates have reasons to stay, and many residents who had previously left for Warsaw, Berlin or London to find a job there are also returning to the city, because now it is possible to make a career here and enjoy life.

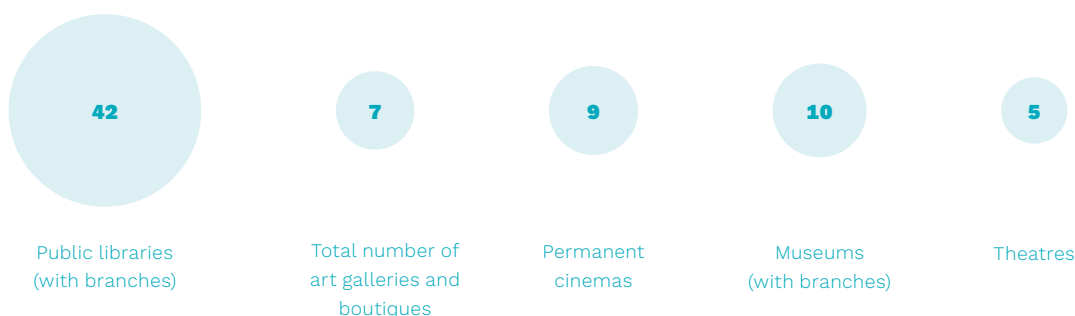
This is confirmed by independent studies. In the last edition of the “Report on Polish Metropolises” of the consulting company PwC Lublin, in the category of quality of life, received the highest score among the 12 surveyed cities. The research took into account, among others, the state of the natural environment, availability of high quality medical and educational services, sense of safety and road traffic nuisance. This is partly due to the fact that the local government authorities were very actively involved in efforts aimed at environmental and climate protection. These include activities aimed at the elimination of inefficient heat sources (e.g. replacement of household stoves, thermal modernisation of buildings, expansion of heating and gas networks) or promotion of renewable energy sources. More and more public and private buildings are equipped with photovoltaic cells, and solar energy is also used by 30 city buses and bicycle stations.

The city invests heavily in the development of public transport to reduce emissions and the use of passenger cars, and urban transport in Lublin is one of the most ecological in Poland. The city is surrounded by a network of 12 trolleybus lines with 123 trolleybuses, and “regular” buses are gradually replaced by hybrid and fully electric vehicles. Lublin transport is used by more and more people. In 2018, passengers used it 131.7 million times, i.e. over 30% more than in 2012.

Cycling infrastructure is also developing dynamically. In 2018 alone, 8.6 km of new cycle paths were built and the entire network is already 155 km long. The Lublin Municipal Bicycle System consists of 97 stations, 950 bicycles for rent, over 95 thousand users and almost 700 thousand rentals per year (data for 2018.).

**Investments in ecological transport, clean air, interesting cultural offer, compact character of the city—all this makes the quality of life in Lublin above average.**

### CULTURE



Also in the eyes of its residents Lublin is a very friendly place to live. According to a study commissioned by the magistrate in 2018, they are most satisfied with the quality of urban mobility, sense of security and the available offer of leisure time activities. And this one is indeed very rich, both in terms of sport and recreation, as well as culture. In recent years, a city stadium has been built (where international sports competitions are organized, e.g. FIFA U20 World Cup) as well as a speedway stadium and an aqua park, whilst city parks and recreation areas are being revitalized. The cultural infrastructure is impressive, with the monumental Centre for the Meeting of Cultures at the forefront, and Lublin's showpiece are now open-air festivals, such as the Night of Culture (concerts, exhibitions, theatrical performances, film screenings, etc.), Carnaval Sztukmistrzów or Wschód Kultury-Inne Brzmienia Art'n'Music Festival (presentation of the most interesting musical phenomena). Such events are becoming an increasingly stronger magnet for tourists, effectively attracting guests for a short stays (so called city break). As a result, in 2018 the city was visited by as many as 1.5 million people.

Lublin is a beautiful city situated on the hills. It is now 700 years old, so it is full of historic gems of architecture. At the same time, it manages to combine tradition with modernity. Within the framework of the smart city concept, Lublin successfully implements new technologies, e.g. in the public transport management system, in the traffic management system or in other urban services. The Lublin authorities treat the smart city slogans more broadly than only referring to a digital transformation; for them it is another stage of development and a possibility to positively influence the life of the residents (smart people, smart living, smart governance), economy, technology and the environment.

## **EAST FULL OF OFFICES**

At the end of 2018, the city had about 205,000 square metres of office space available in total, almost 50% more than at the end of 2014. The fastest growth is observed in A-class office buildings, which already offer 107,000 sqm of office space, i.e. twice as much as four years ago. And developers are planning to build another 77,000 sqm of office space. Prices are also important—in the most attractive locations they start at EUR 12 per square meter, according to reports by Cushman & Wakefield. This is slightly less than in other cities (e.g. in Krakow or Wroclaw prices start from EUR 14.5 sqm/month). C&W experts note that the growth of the commercial office real estate market in Lublin is a result of intensive interest of the business services sector in the city.

Lublin is also developing its hotel facilities. Currently, there are about 30 hotels with nearly 3 thousand beds, including those of the highest

## **HEALTHCARE\***

2017 | per 10,000 inhabitants

53 25

**beds**

**doctors**

\* data regarding  
Lubelskie voivodship

**The number of modern office buildings in Lublin is rapidly increasing. They perfectly harmonize with the urban tissue of historic buildings.**

standard. In the coming years, more hotels are to be built in order to keep up with the growing demand from tourists and business. The conference and exhibition space is provided primarily by the Lublin Trade Fair, the Lublin Science and Technology Park and the Lublin Conference Centre. The Lublin Trade Fair has a 20-year-long tradition, is one of the most important centres in Poland, boasts over 12 thousand internal exhibition space and organizes over 60 events a year. The new player is the Lublin Conference Centre located in the very centre of the city (it started operating in 2016), which—in combination with the neighbouring Meeting of Cultures Centre—can organize world-class conferences for thousands of participants.

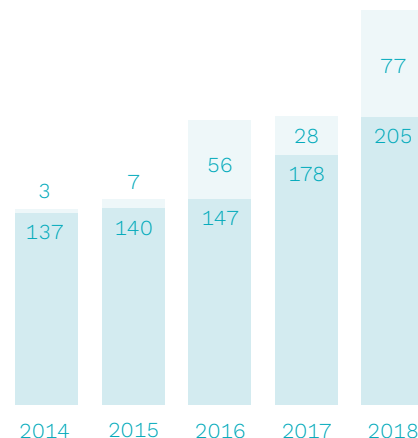
There are also more and more production and logistics centres in the city. Marek Dobrzycki, Managing Director of Panattoni Europe, the largest developer of this type of space in Poland, notes that this is an effect of improving road infrastructure and development of e-commerce. The company's latest investment is Panattoni Park Lublin II, with space for both light production and warehouses. Ultimately, the Park will consist of 4 facilities with a total area of approx. 70,000 sqm. Currently, modern industrial and warehouse facilities located in the city offer approx. 180,000 sqm of space, which may increase to even 300,000 sqm by 2020.

In the vicinity of the Lublin Subzone SSE, conveniently located investment areas are still available, and the city is preparing further plots that can serve not only production but also economic activity in the broad sense of the term. Works are currently underway to create a new business district in the immediate vicinity of the integrated transport station, and ultimately 250 ha of new investment areas are to be made available in Lublin in the coming years.

## THIS IS WHERE INNOVATION IS BORN

Lubelskie voivodship occupies a high, fifth position in the country in terms of regional innovation potential in the ranking prepared by Bank Millennium. Still in 2014 it was on the 9<sup>th</sup> position. Such a good position is due to relatively high expenditures on research and development and a high number of patents obtained. In 2018 alone, 168 patent applications were filed in the whole region (120 in Lublin alone) and 304 invention were submitted (217 in the city). The leader is the Lublin University of Technology. It is therefore not surprising that the whole region—according to Bank Millennium data—can boast the highest percentage of innovative companies in the industry sector in Poland, as well as the fourth highest percentage of net revenues from sales of products of entities classified as high and medium-high

## MODERN OFFICE SPACE



- Area covered by the zoning plan (in thousands of m²)
- Usable area under construction (in thousands of m²)

## INVESTMENT AREAS

300 ha

**Thanks to its skilful approach to the development of start-ups, Lublin has made it to the first league of the most innovative and creative centers in Poland.**



technologies. The region's innovativeness is fostered by the cooperation of enterprises within the cluster initiative and other formal forms of cooperation. The percentage of companies that engage in such initiatives puts the region in second place in Poland.

"Under the framework of such cooperation we are working on the project of an autonomous transport vehicle for our company," says Robert Bronisz, Vice-President of the Management Board, and plant director at ABM Greiffenberger Polska. "We produce electric motors ourselves, and the IT company prepares software for such a robot, so in this way we use local synergy."

The leader of digital transformation and industrial revolution 4.0 in the Lublin metropolitan area is Lubella—pasta producer, which belongs to the Maspex Wadowice Group. Lubella, whose traditions go back to the end of the 19<sup>th</sup> century, can boast a fully automated production and storage complex. The logistics base of the company, in which integrated industrial and warehouse automation systems work, is more than impressive. They place goods on pallets, transport and put them into the warehouse, support order picking and prepare them for dispatch.

"Such investments boost our productivity, but contrary to fears, they do not lead to laying workers off," stresses Piotr Romańczuk, Vice-President of the Management Board, Logistics Director at PZZ Lubella GMW. "The use of new technologies in the industry is the only way to develop, but it is worth noting that more and more advanced solutions are also used by farmers with whom we cooperate," says Piotr Romańczuk.

The start-up environment in Lublin is also growing dynamically. Since 2017, the city has been a national partner of Creative Business Cup, a competition for start-ups, the world final of which takes place every year in Copenhagen. Over 70 countries are associated in the Creative Business Cup network. There are also two start-up platforms in Lublin, financed under the Operational Programme "Eastern Poland". These are "Unicorn Hub", supporting projects in the smart city/transport and automotive industries, medicine/public health, IT/ICT, run by the Polish Foundation of Economic Development Support Centres "OIC Poland" and "Idealist" (energy, tourism, medicine and health, IT/ICT), operating within the framework of the Science and Technology Park for Energy. The Lublin Science and Technology Park also participates in supporting start-ups.

The total number of start-ups in the city is estimated at over 400. In 2019, Samsung launched its incubator for digital security start-ups in Lublin. Partners in this project are NASK National Research Institute, Lublin University of Technology, HugeTech and the city of Lublin. One of the start-ups that will operate in the incubator is Cyberstudio. The company is working on special AI algorithms for companies without IT security management specialists.

### **Area covered by the zoning plan**

53.3%

### **Patent applications filed in 2018 in Lublin**

120

### **Inventions submitted in the city in 2018**

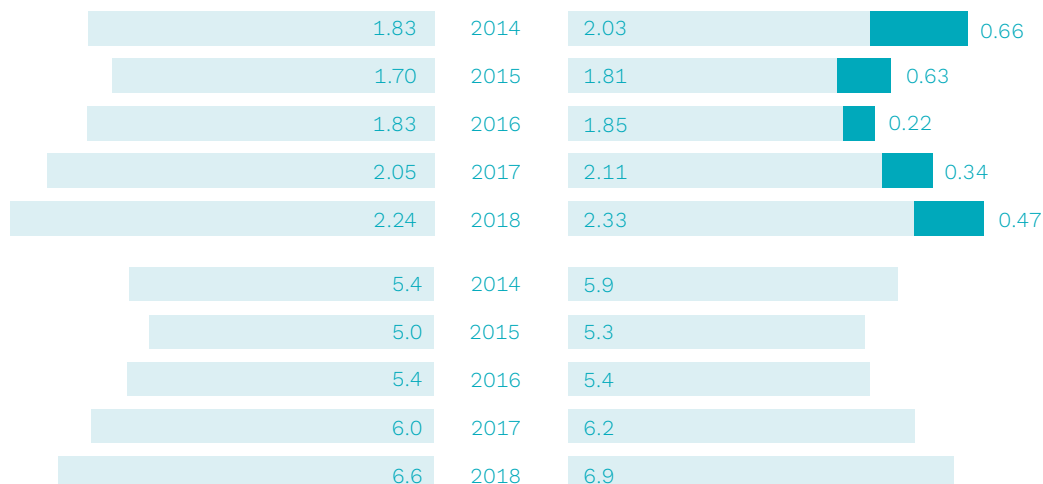
217

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues (in thousands PLN per inhabitant)

Expenditure (in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

2017

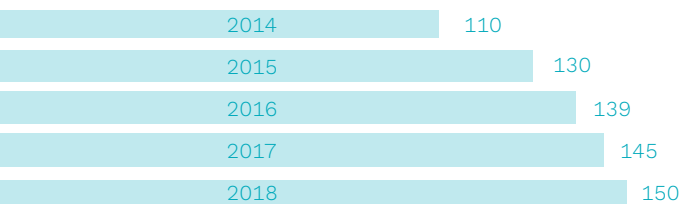
2018

9 universities  
64,330 students

9 universities  
62,977 students

## BIKE ROUTES

(in km)



## ELECTRIC CARS

2018

4 charging stations

**HOUSING RESOURCES**

2017

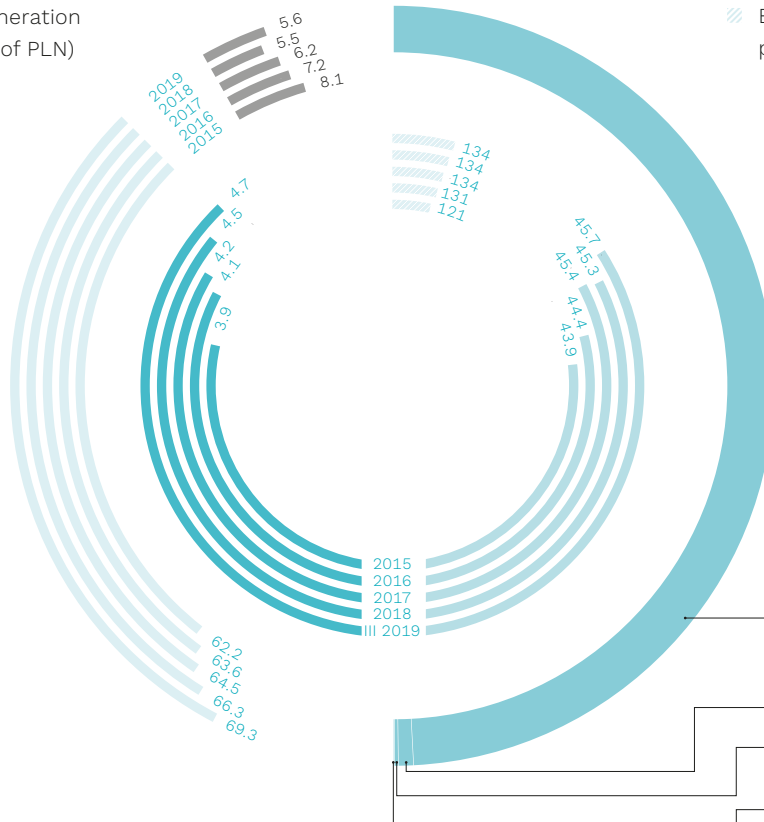
2018

**2,716**80 flats per  
10,000 people**2,889**85 flats per  
10,000 people**Completed  
flats****17%****of the city is covered  
by green areas****HOTELE**2  
\*1  
\*\*20  
\*\*3  
\*\*1  
\*\*\***31****hotels with  
conference facilities**

- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)

**COMPANIES IN THE CITY**

- Enterprises operating in the city (in thousands)
- ▨ Enterprises operating in the city per 1,000 inhabitants

**4,202****new companies were  
registered last year****11%****of all the companies  
registered are  
foreign companies****COMPANIES  
ACCORDING  
TO EMPLOYMENT**

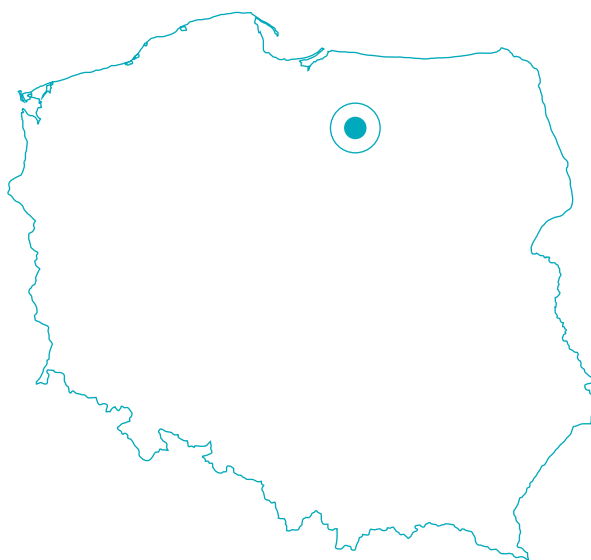
- 96.3%** of micro companies (up to 9 employees)
- 2.9%** of small companies (10–49 employees)
- 0.7%** of medium-sized companies (50–249 employees)
- 0.1%** of large companies (over 249 employees)

Sources: Central Statistical Office (GUS),  
survey conducted in the city, own sources









# OLSZTYN

Voivodeship	Warmińsko-mazurskie
Mayor	Piotr Grzymowicz
Area	88 sqm
Population density	1,959 people per sqm
Population	172,623
Granting urban rights	31.10.1353
Mirror reflection	Split, Segedyn, Burgas
Aspirations	Lubeka, Dijon, Saint-Etienne

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# GARDEN OF DEVELOPMENT

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## **PIOTR GRZYMOWICZ, MAYOR OF OLSZTYN**

Olsztyn is developing dynamically, and the investments of recent years have brought about huge, favorable transformation of the city, positively affecting its attractiveness. That is why Olsztyn is an ideal place for business development. The capital of Warmia and Mazury is characterised by compact development, which facilitates moving around quickly, without wasting time on long journeys. Slower and quieter pace of life than in metropolises means that employees are not so overtired and stressed out.

## **PIOTR KULIKOWSKI, PRESIDENT OF INDYKPOL**

Indykpol has been associated with Olsztyn since the 1970s. We positively perceive the improving quality of roads. What we value the most, however, is the cooperation with local authorities based on mutual trust. Both the company and the city are constantly developing. We are connected by topics related to investments, communication and access to qualified employees.



## **BŁAŻEJ SZPAKOWSKI, OWNER, MEMBER OF THE BOARD OF SAL MULTIROTOR**

The biggest advantage of doing business in Olsztyn is the fact that the city is located in the macro-region of Eastern Poland. The region is currently highly subsidized by the EU and government. Lack of developed industry means that there is a smaller local market and local competition.

## **JAROSŁAW MICHALAK, PRESIDENT OF MICHELIN POLSKA**

The Michelin Group has already invested more than EUR 1 billion in the Olsztyn factory not only because of the strong position of our plant in the group, but also because of a number of factors facilitating investment. I would mention here the openness of local authorities to cooperation or the activity of the Warmia and Mazury Special Economic Zone. The investment potential of Olsztyn is growing, mainly due to the improving transport infrastructure.





Do you prefer living close to nature or in a modern city? You don't really have to choose. A city with 11 lakes, surrounded by forests, which—for many years—has been treated by visitors as a stop on their way to Masuria. However, those who have not been in Olsztyn for several years may be surprised by the transport system, newly built housing estates, modern infrastructure at Lake Ukiel or the largest residential, service and office complex in the region, growing in the Centaurus centre. Although Olsztyn has been referring to the idea of a garden city offering relaxation in a green environment for already 10 years now, this idea has been evolving and adjusting to the requirements of modern agglomerations.

"Olsztyn is an ideal place to invest," says Piotr Grzymowicz, Mayor of the city. "It is developing dynamically, and the investments of recent years have brought about a huge, positive transformation of the city. For several years now, the city has been a destination for many tourists, not just a gateway to Warmia and Mazury, which is confirmed by a 40% increase in tourist traffic."

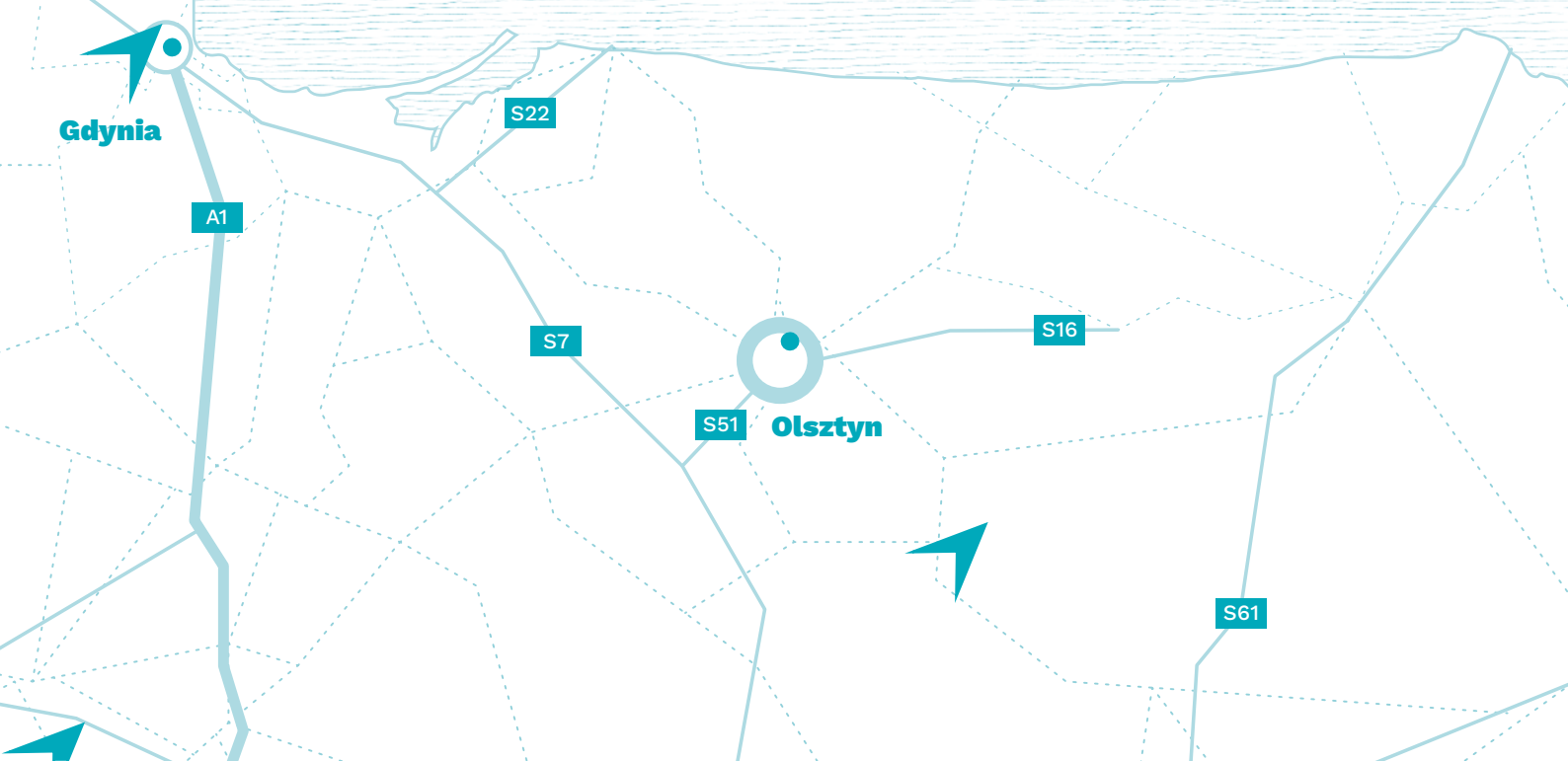
The city with a population of 172 thousand inhabitants also helps run a business. Olsztyn's asset is its human potential and the facilities of the University of Warmia and Mazury, attended by 20 thousand students. The unemployment rate in Olsztyn at the end of April 2019 fell to a record low of 3%.

The economic landscape of Olsztyn is dominated by small and medium-sized enterprises, but the giants of the city also feel very good here: Michelin with its distribution centre or City Handlowy and its clearing centre. The same applies to local brands already known in the world: Wipasz, DBK, Sprint, Ogram, Zortrax. An original place of creation of modern and innovative companies is the Olsztyn Science and Technology Park.

The companies established and operating in the city provide the world markets with revolutionary solutions in technology, which is more readily associated with the Silicon Valley in California. The special economic zone is operating more and more dynamically. In recent years, express roads to Tri-City and Warsaw have been modernized. The good condition of the city is confirmed by financial data. Olsztyn's income in 2014 was still below PLN 963 million and in 2018 it already amounted to PLN 1.2 billion. Last year was a record year in terms of CIT revenues. The data of the Central Statistical Office show that the value of goods marketed by Olsztyn companies in 2017 exceeded PLN 6.7 billion, which is the highest rate in recent years.

"Many people are surprised at the pace of change, but although I am in favour of sustainable development, an acceleration was necessary because Olsztyn was many years behind in terms of investment," says Mayor Grzymowicz. "We have been given a huge development opportunity in the form of the European Union's funds and we took advantage of it."

**Combining the climate of a leisurely, picturesque tourist destination with the vision of a modern agglomeration, Olsztyn has been experiencing a phase of bloom for several years now**



341 km

**hard surface public  
roads per 100 km<sup>2</sup>**

## EXPRESS ROADS

Olsztyn, hidden among lavish greenery, is undergoing a revolution in terms of transport accessibility. The 24.5 km long southern ring road of the city, which has just been completed, is a link between the East and the West. New exit roads connected with the ring road have been built in the city. For half a year now it has been possible, using the express road S51, to get in less than 20 minutes from Olsztyn to the national expressway S7 between Warsaw and Gdańsk (the capital of Tricity can be now reached in 1 hour 40 minutes). When the Olsztyn-Mazury Airport in Szymany, 56 km away, was opened four years ago, the self-government of the voivodeship launched a rail bus, which in 40 minutes carries passengers comfortably from the Olsztyn Główny Railway Station to the airport terminal itself.

The communication system in the city has undergone the most profound revolution. After exactly 50 years, in December 2015, trams returned to the city. At the expense of almost PLN 0.5 billion, three lines were built connecting the largest housing quarters with the railway station, shopping centers, the Old Town, the city center and the university. By the end of 2022 the construction of two new tram

- motorways  
and expressways
- railways
- airport
- railway station

lines is to be completed: from Pieczew to Olsztyn-Główny Station and to Śródmieście.

The 83-kilometre Olsztyn-Działdowo railway line, which will connect the capital city of Warmia to the fast railway infrastructure network, is being completed. The investment will cost PLN 260 million and speed up the journey in this section by 15 minutes.

## **SLOW-TYPE BUSINESS**

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How to conquer the market of a country whose inhabitants are not sure whether Poland is the name of a New York rap band and who cannot pronounce the name Olsztyn? "We start our economic mission by showing a map," admits Patrycja Kaczmarczyk, project manager from the Olsztyn branch of Enterprise Europe Network at the Warmia and Mazury Regional Development Agency. Economic missions organized by the EEN are aimed at establishing foreign contacts and discovering new markets. How to find such a fertile, and sometimes far away land?

EEN is the largest international network of 600 organisations from 62 countries whose aim is to support SMEs with international ambitions. Thanks to this, the Olsztyn entrepreneurs have access to hundreds of offers from foreign investors. Hence, for example, inquiries from the UK about natural food products and from Germany about furniture. "Our region is known as ecological, with a dynamically developing wood and furniture sector and educated staff. Our companies offer a good raw material and moreover they benefit from organizational innovations and develop industrial design. They are often small, family-run, but conscious companies," says Patrycja Kaczmarczyk.

EEN is of course not the only institution operating in Olsztyn the aim of which is support business. The Warmia-Mazury Special Economic Zone manages an area dedicated to supporting new investments encompassing 33,000 km<sup>2</sup> (3.3 million hectares). Two subzones are located in the city, a dozen or so more in its immediate vicinity. There is also the Olsztyn Science and Technology Park. It offers investors not only offices, but also specialist, equipped laboratories, conference rooms, halls and coworking spaces. In addition, free training and substantive mentoring.

Two other institutions that support investors and local entrepreneurs are the Olsztyn branch of the Państwowa Gospodarka Rolnicza and the Institute of Entrepreneurship and New Technologies. The first one provides financing instruments for companies: a loan fund using EU funds, subsidies for starting business activity and a development services fund, which allows reimbursement of training courses or workshops. IPiNT is a leading company in Olsztyn, supporting the development of entrepreneurship and institutions in its ecosystem through modern solutions: consulting

**Small family businesses are turning into international companies. Often thanks to the help of business support institutions operating in Olsztyn.**

and training. “What we perceive as key in providing real support for enterprises, regardless of their size or time of existence, is market practice and real experience, supported by professional successes, both ours and those of our experts,” emphasizes Anna Ciesielska, Vice-President of the Institute.

## WORKING IN THE COMPANY OF BIRDS

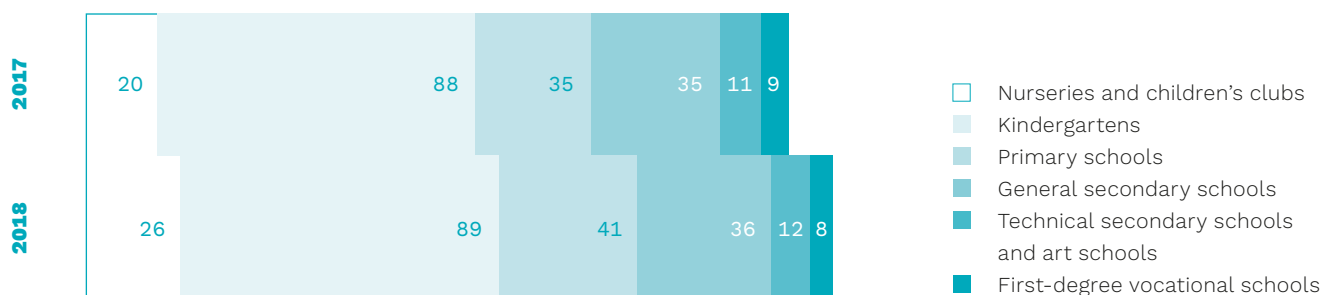
Olsztyn’s advantage is its beautiful but also convenient location. Developed infrastructure, construction of new roads and the Olsztyn-Mazury Airport, established in 2016, provide investors and entrepreneurs with excellent logistics and communication. Today there are over 23.2 thousand business entities operating in the city. These are mainly micro-enterprises (96.1%), but there is no shortage of global tycoons either: Michelin, Wipasz, BRW Comfort or Indykpol. The city takes pride in, among others: DBK, Sprint, Oram or Zortrax. In order to meet the requirements associated with the dynamic development of the local economy, the city must focus primarily on human capital.

Five universities with a total number of students exceeding 22.5 thousand play a key role in preparing human resources for business. The University of Warmia and Mazury leads the way and can boast the most beautiful academic campus in Poland. Its 17 departments and 75 faculties located among lakes and greenery are educating almost 19,000 students (including 366 foreigners). Last year, the number of university graduates reached 5,401.

“The University undertakes and implements activities aimed at facilitating the entry of graduates onto the labour market,” emphasizes dr hab. Jerzy Przyborowski, Professor at UWM, Vice-Rector for education and students. “Apart from the tasks carried out by the Career Office and the Business Academy, an important element is the practicalisation of the education process, which includes tasks facilitating the creation

**A dozen or so lakes and the largest forest complex in Europe situated within the administrative boundaries of the city, also provide an excellent space for business development.**

## EDUCATION



of curricula meeting the needs of the national and regional entities representing the social and economic ecosystem and dual education, consisting in conducting both classes at the university and practical classes to gain work experience at the employer's premises. UWM has signed relevant agreements with, among others Michelin Polska, Ogram, Zortrax, Social Insurance Institution and Citi Handlowy

Another unit of UWM taking care of science-business relations is the Centre for Innovation and Technology Transfer, which aims to better utilize the intellectual and technical potential of the university and transfer the results of scientific research and development work to the economy.

The activities of the university are reflected in the latest report of the Educational Foundation Perspective. "This relatively young university, which is celebrating its 20<sup>th</sup> anniversary this year, ranked ninth among 22 Polish universities, and 22nd among all higher education institutions in Poland in terms of the market position of graduates and 21st in the category taking into account employers' preferences," stresses dr hab. Jerzy Przyborowski.

Educating staff for local business is also taken seriously by the authorities running secondary schools. The city focuses on the development of vocational education. In Olsztyn, there are 11 technical schools and eight first-degree vocational schools whose curricula have been adapted to suit the most dynamic branches of the economy in the region. In 2016, the Warmia and Mazury Education Authority signed a cooperation agreement with the Warmia and Mazury Special Economic Zone, under the framework of which students take part in internships and apprenticeships organized in many companies in the city and region, and may also benefit from special scholarship programmes.

Attractive internship options are sometimes the result of the efforts of teachers working in particular institutions. The Olsztyn "chemist", i.e. Technical School No. 8, within the Erasmus+ programme offers students work experience in Seville in Innoagral laboratories together with accommodation, meals and a rich cultural programme.

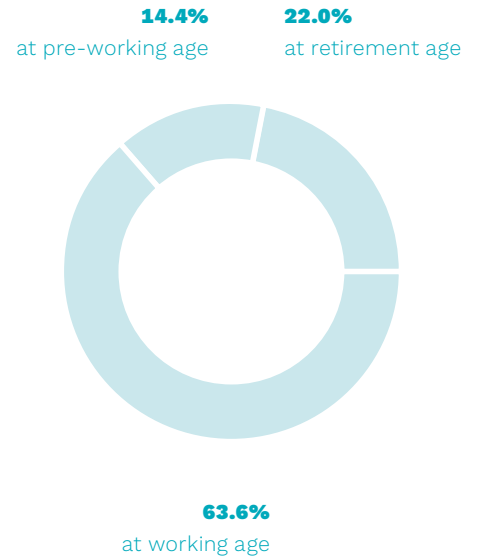
Olsztyn is an almost ideal place for freelancers and people working remotely. Teleworking seems to be more attractive when birds are singing outside the window and you are far away from the hustle and bustle of city life. The city authorities are aware that putting greater emphasis on Internet development and popularisation of access to the world wide web will pay off. Especially that more and more coworking spaces are being created in the city.

Projects implemented by the Olsztyn Science and Technology Park provide a good start for innovative companies from the SME sector. They are used to incubate companies in the initial phase of business development and, as a result, to strengthen their market position.

The result? A more and more visible trend of young people returning to their hometown. "It is often the case that we recruit people who

## POPULATION

2018



come from here, but who had left earlier to go to large agglomerations in search of employment,” says Łukasz Kujawa, owner of the Olsztyn-based Falken-Trade company operating on the market of functional food additives (he founded the company himself while still a student in Germany, to finally bring it to his hometown of Olsztyn). “It is easier to persuade them to come back because they know that our region is the best place to live. And if someone has experienced the local climate, they know what it’s worth and they like to come back here. This way we have encouraged a few people from Germany and England to come back. These are the people who went there to work, but deep down inside they were only waiting for an opportunity to come back here.”

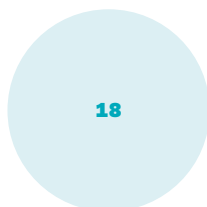
## HOLIDAY ALL YEAR ROUND

The space of the capital of Warmia and Mazury favours those who are keen on the idea of work-life balance. The natural potential of the capital of Warmia and Mazury and its recreational infrastructure encourage people to be active and relax in any season of the year. Within the borders of Olsztyn there are 11 lakes with a total area of over 700 ha and five smaller water bodies. On the shores of the largest lake Ukiel (over 400 ha), there is a modern, year-round infrastructure with sports equipment rentals. The unique architectural design of the Sports and Recreation Centre Ukiel has received many industry awards and has made it to the finals of the international competition World Architecture Festival. Last year, the lakes were visited by over 1,300 thousand people. One of the events taking place at the lakes is the Olsztyn Green Festival, at which for the last six years the stars of the Polish music scene have been performing for the audience of 30 thousand people. The organized sports events include the European Triathlon Cup.

Green areas, in combination with water bodies, create a spectacular space for work and relaxation. Nowhere in Europe is there such a huge area of forest located within the administrative boundaries of the city. The Municipal Forest in the northern part of the city with an area of over 1,400 ha offers plenty of tourist and bike routes.

**Being among the top cities with the cleanest air in Poland brings measurable benefits. Close contact with nature, combined with business potential and modern infrastructure, attracts investors to Olsztyn.**

## CULTURE



Public libraries  
(with branches)



Total number of  
art galleries and  
boutiques



Permanent  
cinemas



Museums  
(with branches)



Theatres



A garden city is one of the advertising slogans of Olsztyn, which refers to, among others, six parks. The largest of them, the revitalized Central Park and Podzamcze, are a photogenic background for the Gothic castle of the Warmia Chapter, where Copernicus lived, or the 14<sup>th</sup> century cathedral. In the amphitheatre located in the heart of the Old Town, some of the events of the Olsztyn Artistic Summer organized by the Municipal Cultural Centre take place. This summer alone there are more than 110 concerts, performances and projections on the schedule. The local Stefan Jaracz Theatre has also been operating since 1925. It is the organizer of the prestigious Olsztyn Theatre Meetings and the Demoludy Festival. The Warmia and Mazury Philharmonic has been operating for several years now in a modern building with an interesting architectural design.

One of the investment priorities of the commune is pro-ecological activities. These include, among others, the construction of tramway networks, road repairs and building ring roads, or offering subsidies for the replacement of sub-standard household stoves, for which the city allocated PLN 220 thousand this year. Last year, 25 smog detectors appeared in the Olsztyn housing estates. The parameters of dust concentration can be checked by means of an application.

The sustainable development of Olsztyn is confirmed by its high positions in the rankings of Polish cities. Last year it was ranked first in terms of the use of EU funds. The jury of the Eco-City 2018 competition gave Olsztyn an award in the category of sustainable mobility and urban greenery. And this year, in the Smart City Award competition, the city received awards for promoting the idea of modern technologies to improve the quality of life of residents and tourists. The verdict was justified by road and public space investments, intelligent lighting, traffic management system, city monitoring and integrated ICT system supporting services, as well as the “Safe Olsztyn” application. This assessment was also influenced by the introduction of the latest generation city bike system, equipped with a GPS module. Bicycle paths in the city are more than 100 km long and more are still being built.

As experts from the real estate market, which is very dynamic in Olsztyn, point out, the trend of buying apartments for rent has been strong for several years. This is because Olsztyn has become an attractive place to live, work and study. The University of Warmia and Mazury, which is celebrating its 20<sup>th</sup> anniversary this year, contributes to this trend. Among the best rated faculties we can find zootechnics and veterinary science.

Graduates of the Faculty of Medical Sciences will find jobs in the seven hospitals in Olsztyn—winners of prestigious awards for innovative medical practices. Next year, the Adam Mickiewicz High School No. 1 in Olsztyn will be the first in the region to join the world network of IB World School schools. The two-year International Baccalaureate educational programme, implemented in a foreign language, will end with an international final exam. The IB diploma is a kind of window to the world—it is honoured by the best universities in Europe and beyond. Thus, Olsztyn is marking its position more and more clearly not only on the tourist map.

## HEALTHCARE\*

2017 | per 10,000 inhabitants

**47** **21**  
**beds** **doctors**

\* data regarding  
Warmińsko-mazurskie voivodship

## GREEN OFFICE

It is important that the capital city of Warmia and Mazury hasn't lost its green climate. "We want the direction of development to be in line with urban strategies, using the natural values of Olsztyn and minimally invasive for the environment, which is our potential and treasure. A good example would be investments in the BPO sector and shared services centres. We have not been, are not and will not be an industrial city. What motivates the efforts of the city self-government now are the ideas of sustainable development, innovation, open, people-friendly administration," explains Piotr Grzymowicz, Mayor of Olsztyn.

The city is already the largest office centre in north-eastern Poland. Entrepreneurs have 52 thousand sqm of office space at their disposal. Currently, most of the office space is available in the investment complex Cezal Business Center (13 thousand sqm) and Europa Center office building (8 thousand sqm).

The Olsztyn office real estate market is young—about 70 percent of offices were developed after 2012. Business facilities are located mainly in the city centre. The market rate for renting space in class B office buildings is EUR 7.5-0.5 per sqm per month, in class A—EUR 11-13.

Further investments are being completed—at the beginning of 2021 Centaurus, the largest residential, office and service complex in the region, will be ready for use. By the way, this 18th storey and 55 meter high sky scraper is the highest building in this part of the country. Centaurus will offer 8.5 thousand sqm of office space of the highest A standard. "We can see the growing social and economic potential of Olsztyn and its surroundings, and that is why we decided to invest here," says Dorota Bereza, Marketing Coordinator of Inopa, which apart from Centaurus in Olsztyn has made such investments as Sea Towers in Gdynia.

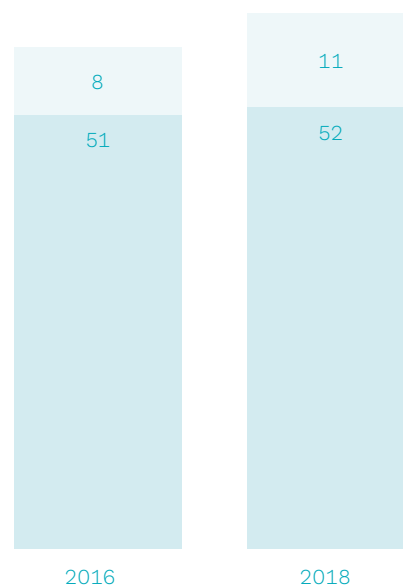
But offices aren't everything. Olsztyn also has areas prepared for investments. Currently, the city offers 13 plots of land. 58% of the city's area is covered by the zoning plan. Olsztyn is also a perfect place for business meetings. There are 10 hotels in the city, including 3 of four-star standard. It is also possible to use 13 facilities with modern conference rooms. The most popular ones are those located at the largest lake Ukiel. It is no secret that nothing will make the conference any more pleasant than a beautiful view outside the window.

**Local government officials try to attract business to the developing Olsztyn, but not by all means.**

**Area covered by the zoning plan**

58%

### MODERN OFFICE SPACE



■ Area covered by the zoning plan (in thousands of m²)  
■ Usable area under construction (in thousands of m²)

## **PARKS, INCLUDING THOSE WITH TECHNOLOGY**

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The most vibrant area on the technology map of Olsztyn is the Olsztyn Science and Technology Park located at one of the dozen or so lakes in Olsztyn. Since 2013, a total of over 150 companies have found their place there. Today, 74 entrepreneurs employing over 650 people operate here. Apart from 140 office premises, they can use the laboratories of the Innovation Centre and support of the Entrepreneurship Incubator. OPN-T is a place where modern companies are born and where thoughts, experience and technologies are shared and exchanged. The leading businesses focus on geoinformatics, satellite and space technologies, IT and bioeconomy.

Entrepreneurs are supported by searching for technological offers in foreign and domestic databases, searching for partners, supporting participation in exhibitions and fairs. The original facility whose services they can use is the Centre for Geomatics and Modern Satellite Technologies, operating based on research and development projects in the field of new satellite positioning technologies.

One of the projects implemented by OPNT is Warmia and Mazury Startup Incubator. The undertaking was created with a view to the development of young enterprises from the region. The most important goal is to make it possible for the 53 innovative small and medium enterprises to operate independently on the market within at least three years from the beginning of their operation. Until April 2021, the incubation programme for young companies will be carried out by four centres (apart from OPN-T, also the Science and Technology Park in Ełk, the Entrepreneurship Incubator in Biskupiec and the Warmia and Mazury Regional Development Agency).

The Centre for Innovation and Technology Transfer at the University of Warmia and Mazury is an important institution directing its activities to innovative entrepreneurs, but also to students, universities and research institutions from the region. Since April 2008, it has been a member of the international Enterprise Europe Network. It consists of almost 600 organizations from Europe, USA, China, Chile, Russia. Its task is to support small and medium-sized enterprises on the international arena in developing their innovative potential and ability to introduce innovative projects.

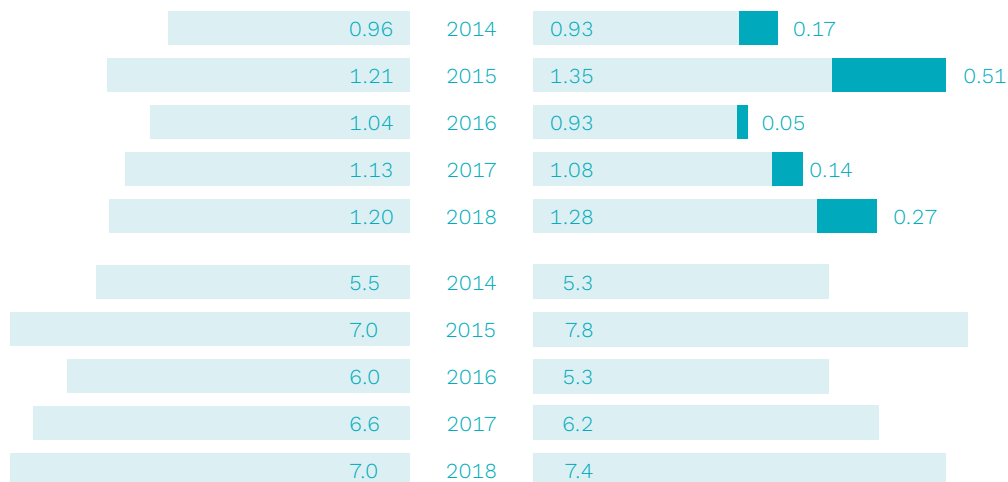
**Olsztyn is  
a place created  
for innovative  
and creative  
activity.  
The proximity  
of nature and  
places where you  
can work and  
rest help in the  
creation of such  
businesses.**

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues (in thousands PLN per inhabitant)

Expenditure (in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

2017

2018

**6**  
universities

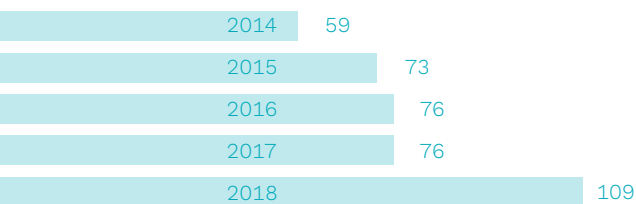
**23,421**  
students

**5**  
universities

**22,519**  
students

## BIKE ROUTES

(in km)



## ELECTRIC CARS

2018

**3**  
charging stations

## HOUSING RESOURCES

2017

847

49 flats per  
10,000 people

2018

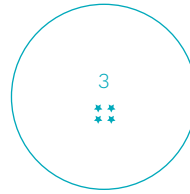
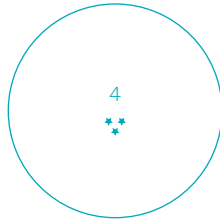
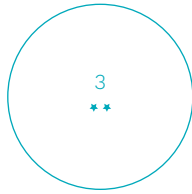
663

39 flats per  
10,000 peopleCompleted  
flats

37%

of the city is covered  
by green areas

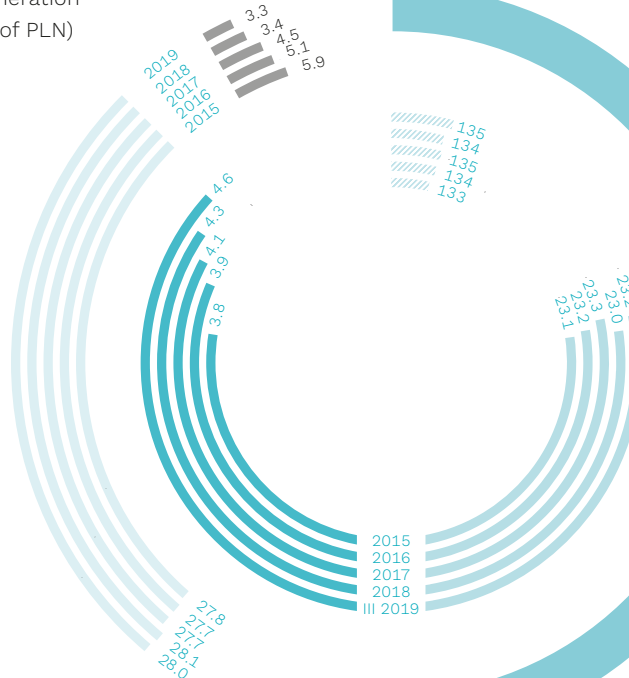
## HOTELS



13

hotels with  
conference facilities

- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)



1,979

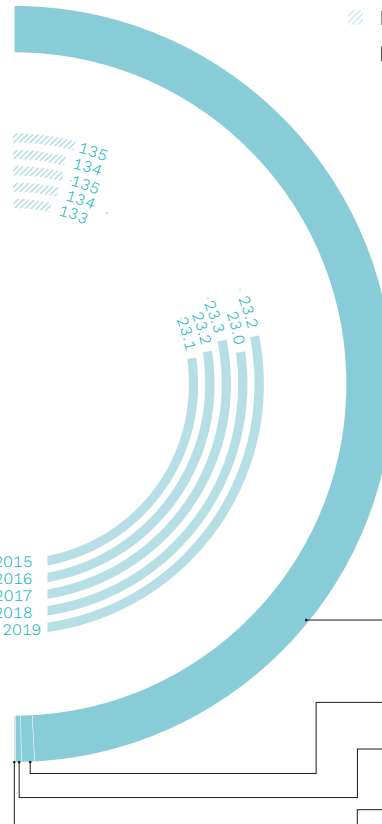
new companies were  
registered last year

7.5%

of all the companies  
registered are  
foreign companies

## COMPANIES IN THE CITY

- Enterprises operating in the city (in thousands)
- ▨ Enterprises operating in the city per 1,000 inhabitants



## COMPANIES ACCORDING TO EMPLOYMENT

- 96.1% of micro companies (up to 9 employees)
- 3.1% of small companies (10–49 employees)
- 0.7% of medium-sized companies (50–249 employees)
- 0.1% of large companies (over 249 employees)

Sources: Central Statistical Office (GUS),  
survey conducted in the city, own sources









# RZESZÓW

Voivodeship	Podkarpackie
Mayor	Tadeusz Ferenc
Area	127 sqm
Population density	1,630 people per sqm
Population	194,298
Granting urban rights	19.01.1354
Mirror reflection	Enschede
Aspiration	Göteborg

## CONTACT DETAILS

Investor Assistance Desk  
Przemysław Stolarz  
pstolarz@erzeszow.pl  
+48 17 875 47 43, +48 607 608 819

# EASTERN HOSPITALITY

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## **TADEUSZ FERENC, MAYOR OF RZESZOW**

Every investment is important to me. And it is worth investing in Rzeszow, because it is considered to be the cleanest and safest city in Poland. I would like Rzeszow to grow by “swallowing up” the neighbouring communes or villages, but I would also like to see it improving. Developers are already planning to build several dozen very tall buildings here. Besides, the city is well connected with the rest of the country, Europe and the world.

## **ADAM GÓRAL, PRESIDENT OF ASSECO POLAND**

I never thought that the dream of creating a strong Polish software company would come true. However, I always knew that Rzeszow is a good place for business. This city gave me everything I needed as a young entrepreneur. After 28 years of hard work of the whole team, Asseco is a large, international company, and I am very proud that the company's headquarters is still located in Rzeszow.



## **MARTA PÓŁTORAK, PRESIDENT OF MARMA POLSKIE FOLIE**

Rzeszow, as a medium-sized city, has the advantages of a large city, but none of its disadvantages. Sustainable development allows to create perfect conditions for work and life. It is important to have access to well-prepared staff and modern technologies. Excellent communication and proximity to Slovakia, Ukraine and Hungary help organize top class business events.

## **MAREK DARECKI, PRESIDENT, GENERAL MANAGER OF PRATT & WHITNEY RZESZOW, PRESIDENT OF THE AVIATION VALLEY ASSOCIATION**

Rzeszow is an open, clean, well-maintained and safe city. The city is inhabited by 200 thousand people, but it seems cosy and well organized. There are no traffic jams and the administration is efficient and friendly. Business has good access to well-educated and talented employees. I am convinced that Rzeszow has still the most beautiful years ahead of it. There is potential and ideas here.



The capital of the Podkarpace region is systematically expanding its administrative borders. In 2005, the city had an area of 54 km<sup>2</sup> and 159 thousand inhabitants. By 2019 it has grown to nearly 127 km<sup>2</sup> and over 194 thousand residents, mostly young people, because the average age was only 39 years.

Since 2006, the local government has invested more than PLN 2 billion in the newly incorporated areas. Developers feel great here and entrepreneurs are moving to Rzeszow from other regions of Poland.

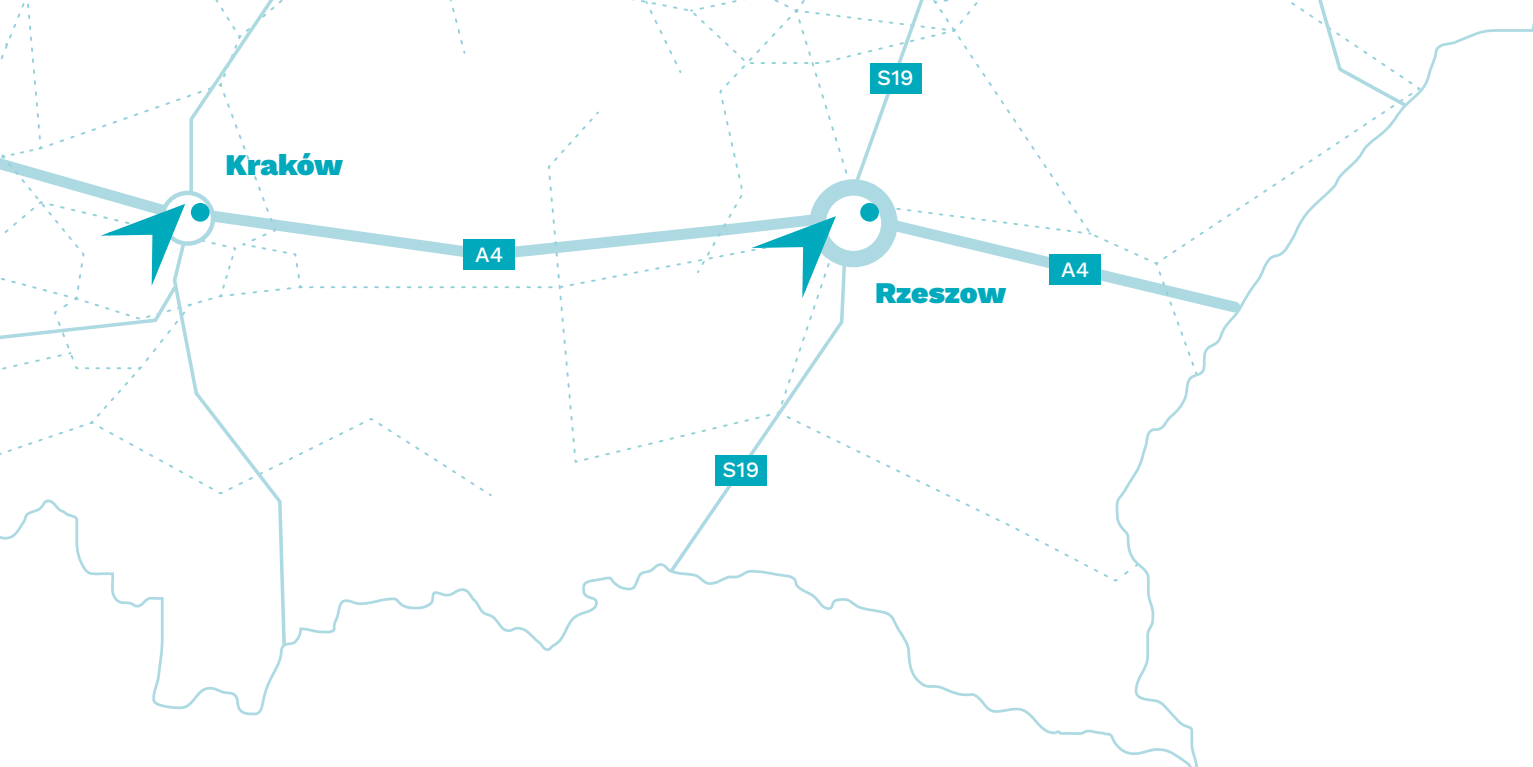
Today, there are over 28 thousand companies operating in Rzeszow (including over 4,000 commercial law companies and 686 companies with foreign capital) serviced by over 800 institutions supporting business. The average remuneration in the enterprise sector is PLN 4.9 thousand. Aviation is the leading industry here—Rzeszow is the capital of the Aviation Valley, one of the largest clusters of this type in the world. Practically most of the world's aviation companies have their offices here. However, other sectors are also becoming more and more important, such as IT (the largest Polish company in this sector, Asseco Poland, has its headquarters here), construction and chemical industry, pharmaceutical and automotive industry, modern business services and the sector of renewable energy sources, all of which are developing in the city. Thanks to its location, Rzeszow is an important trade and logistics centre for companies from Ukraine, Slovakia, Hungary and Romania.

“The business success story of Rzeszow and the whole Podkarpace region is largely due to the Aviation Valley, which today is made up by more than 160 companies and institutions operating in the aviation industry. Among them there are such global giants as Pratt & Whitney, Lockheed Martin, Safran, Rolls & Royce or Lufthansa, but also dozens of small and medium-sized enterprises making up the supply chain,” says Michał Tabisz, Vice President of Rzeszow-Jasionka Airport. “Every year the list of companies in the Valley is extended by new ones, attracted not by cheap labour, but by the quality and experience of staff, because aviation craftsmanship has been handed down here from generation to generation for over 80 years. The airport in Jasionka near Rzeszow has been also operating for a similar time and it is the leader among Polish regional airports with less than one million passengers.

Rzeszow is also becoming a place of important economic events. Next to the Rzeszow-Jasionka airport there is the G2A Arena Exhibition and Congress Centre of the Podkarpackie Voivodeship, the most modern facility in the Podkarpace region. Every year it hosts, among others, the economic Congress 590, which in 2019 gathered about 6 thousand participants from the world of politics, business, science and sport.

Unemployment rate in the city amounts to 5.2%. (March 2019), so it is close to the Poland's average. This means that the labour market is not yet fully drained. Rzeszow is also one of the first places where Ukrainian emigrants stay. But the real potential lies in the power of education—Rzeszow is a modern academic centre today. In terms of the number of students per thousand inhabitants, Rzeszow is the highest ranked city in the European Union. Not only people from the neighbouring cities come to Rzeszow, but also from all over Poland, because they can find work and good living conditions here.

**It is one of the most dynamically developing Polish cities. In recent years Rzeszow has changed beyond recognition.**



237.9 km

**hard surface public  
roads per 100 km<sup>2</sup>**

- motorways and expressways
- - - railways
- ↗ airport
- railway station

## AT A CROSSROADS

Rzeszów is one of the best connected cities in Poland. Important road routes intersect here: the A4 motorway included in the 3rd Pan-European Transport Corridor, leading from Ukraine to Germany, as well as national roads No. 9 and 19, which are the shortest connection between Scandinavian and Baltic countries and the countries of Central and Eastern Europe. After the completion of the S19 road, i.e. Via Carpatia, the quality of transport on the North-South axis will improve significantly. E30 railway line connecting Germany, Poland, and Ukraine also goes through the city.

An important point near the city is the international airport Rzeszów-Jasionka, which can accommodate the largest planes. The airport has one of the two crossings with phytosanitary inspection in Poland and the port itself has signed a cargo transport agreement with Miami, Florida. Apart from LOT, also Lufthansa and Ryanair operate from Jasionka near Rzeszów.

## WITH AN INVESTMENT PILOT

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"Investors will find fully developed investment areas in the Rzeszow-Dworzysko economic activity zone, where the Science and Technology Park also operates. But land is not everything. Entrepreneurs can receive the help of an "investment pilot", a substantive employee of the Investor Service Office at every stage of executing a the new venture," says Jerzy Bieniek, Director of the Rzeszow Investor Service Office. "We also support the creation of classes with a specialized profile and patronage classes in Rzeszow vocational and secondary schools with technical profiles, according to the needs of companies. Moreover, we organize a business tour for entrepreneurs interested in investing in Rzeszow as well as prepare conferences and B2B meetings of local companies with foreign entrepreneurs. This year Rzeszow was visited e.g. by a business delegation from the Netherlands.

BOI can facilitate contacts with entrepreneurs and developers operating in Rzeszow, representatives of HR agencies, business support institutions and real estate agencies. The office can also help connect investors with universities and university career offices and academic business incubators, in which the city has a long experience. It also cooperates with Rzeszow Regional Development Agency in Rzeszow, Industrial Development Agency in Tarnobrzeg, Association of Promotion and Entrepreneurship, local Chamber of Commerce and Industry and Chamber of Crafts, as well as business associations and clusters.

The Economic Activity Zone and the Rzeszow Dworzysko Science and Technology Park are a good place for companies looking for land for new investments. Eventually, the area of the Zone will encompass 450 ha and the companies will employ over ten thousand people. Currently, 180 ha are waiting for investors there. The Zone is a project of the city of Rzeszow, and the PNT is an investment carried out by the Rzeszow powiat. The park is located close to A4 motorway, S19 expressway and Rzeszow-Jasionka airport.

The main assumption of the Rzeszow-Dworzysko Economic Activity Zone is to create favourable conditions for starting business activity, especially for companies using innovative technologies. One of the forms of aid offered by the city of Rzeszow is exemption from property tax and transport tax for new investments for a period of five years. Entrepreneurs who decide to invest within the borders of a special economic zone, as well as in other investment areas in Rzeszow, in accordance with the provisions of the Act on supporting new investments can also count on income tax reliefs.

**Rzeszow Investor Service Office has been operating for 5 years now. Qualified employees can help any company that wants to invest in the city, regardless of its size.**

## ACADEMIC AVANT-GARDE

Nearly 40% of the Rzeszow population have higher education. It is not surprising as the capital of the Podkarpacie region is one of the key academic centres of Eastern Poland. There are five universities in the city, where nearly 40 thousand students can gain knowledge in more than 60 fields of study.

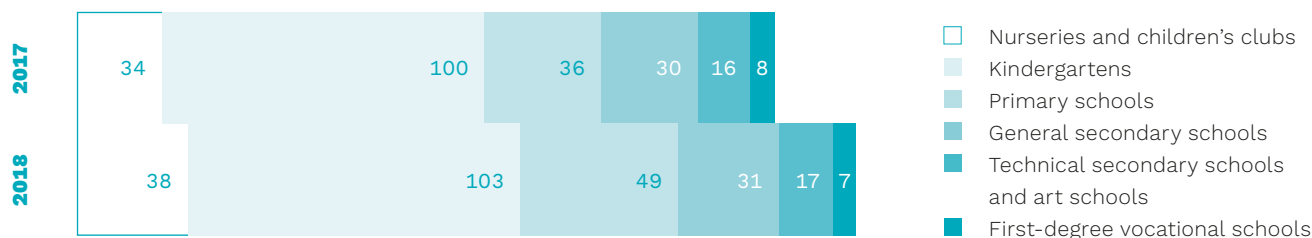
The educational symbol of the city is the Rzeszow University of Technology—one of the first Polish universities educating future pilots of civil aviation in the field of aviation and cosmonautics. But it also offers other future-oriented faculties, such as automation and robotics, computer science, mechatronics, medical engineering, mechanics and machine building. The university has infrastructure and modern scientific and educational facilities at its disposal. At the Rzeszow University of Technology, the only Polish centre has been opened, which allows to gain qualifications as a civil aviation pilot. Its graduates receive, in addition to the professional title of Master of Science in Mechanics (or Engineer) specializing in aviation, a professional pilot licence for CPL aircraft with the right to perform flights using instruments (IR) and multi-engine aircraft (ME). The University is also a member of the Aviation Valley cluster.

The Rzeszow University of Technology cooperates very actively with business. In 2018 alone, it conducted 150 research projects and implemented 320 research contracts for industry, filed 85 patent applications and submitted 11 industrial designs. Thanks to cooperation with key aviation companies—Pratt & Whitney, Hispano Suiza and MTU—the university earns a lot of money. At the moment, more than a quarter of the university's budget (excluding EU funds) comes from work for business, and in 2020 it is expected to be 35%.

In April 2017, the first in Europe Samsung Incubator, established by the South Korean electronic giant in cooperation with the Aviation Valley Association of the Aviation Industry Entrepreneurs Group and the university, was launched at the Rzeszow University of Technology

**Rzeszow is a young city as the average age of its inhabitants is only 39 years, largely thanks to the universities educating specialists for companies located in the city and its surroundings.**

## EDUCATION





Within the framework of the incubation programme, innovative projects from the aviation, space, automotive and virtual reality industries are implemented. In addition to traditional courses, the University of Rzeszow also focuses on innovative courses such as nanotechnology, microelectronics, innovative use of forests, biotechnology, renewable energy sources, logistics in the agri-food industry, having at its disposal modern facilities, such as the Centre for Microelectronics and Nanotechnology, the Centre for Innovation and Transfer of Technical and Natural Knowledge or the interdisciplinary Computer Modeling Centre.

The University of Information Technology and Management in Rzeszow is the largest non-public university in the Podkarpace region. UITM is the fourth facility in Europe and the first in Poland to have introduced studies in English in aviation management to its teaching offer. The university cooperates not only with companies from the Aviation Valley, but also with technology companies from the Silicon Valley in California.

There is also another college in Rzeszow—WSPiA, which offers studies on the following faculties: law, administration, management and internal security, boasts a modern Forensic Science, Criminology and Forensic Medicine Centre and a perfectly equipped electronic shooting range. The educational offer of the city meets the needs of investors from various industries.

## LIFE LIKE A BARCELONA

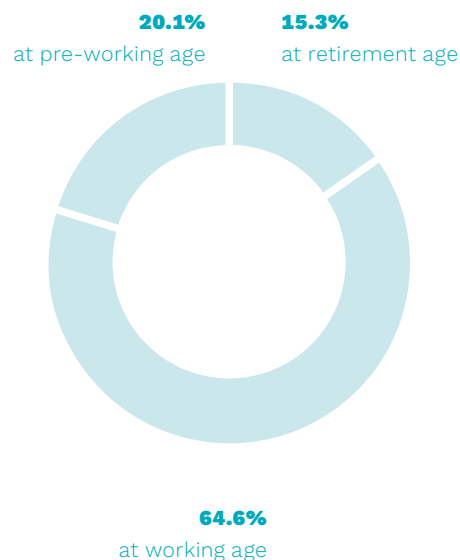
“When I arrived in Rzeszow in 2001, the city looked completely different. Since then it has grown very big and now looks very nice. Often, I had the pleasure to hear from people who came here for the first time for business purposes that Rzeszow is very well maintained, green and that they are very impressed,” says Radosław Walas, member of the Board of Developres. “It is a good place to live, the city is not large in size, so you can quickly get to work or take your children to school or kindergarten.”

This is a city that is easy to live in, clean and attractively located. And it is getting more and more beautiful. Visitors appreciate the vast range of revitalisation activities undertaken by the authorities. In total, 30 projects are planned to be completed by 2023.

Smog is a rare occurrence in Rzeszow and air quality is constantly monitored. “Developers and cooperatives sell apartments immediately. Thanks to co-financing from the European Union, a modern transport system has been introduced in the city. Car traffic is controlled by cameras, and information boards display information for drivers about the situation on the streets. As part of this project, we are systematically replacing our bus fleet with ecological vehicles. Bus stops in the city centre are air-conditioned in summer and heated

## POPULATION

2018



**To which cities would the residents of Rzeszow like to compare the city in the future? Barcelona, Vienna, Göteborg. In other words, to cities with character.**

in winter,” says Marzena Furtak-Żebracka, director of the Promotion and International Cooperation Department. The modern system integrating public transport cost PLN 415 million.

In the rankings of quality of life in cities Rzeszów was ranked 4<sup>th</sup> among voivodship cities and 5<sup>th</sup> in the general ranking. The authors of the ranking took into account the criteria collected in 10 thematic categories, including: education, work, housing, environment, health, safety, community, free time, self-government, transport and communication.

Rzeszów received the highest marks in such categories as: health of residents (1st place), civic involvement (3rd place), education (4<sup>th</sup> place). In order to ensure that the residents do not have problems with official matters, service points for the residents in have been established in shopping malls in Rzeszów. There, they can, among others, exchange their ID card or driving licence, register a car, get a PESEL number or leave correspondence for the office. There is also a system of city text messages. It is a platform through which residents are informed about important events.

An important element affecting the quality of life is the cultural offer. In addition to cinemas, theatres, museums and galleries and the underground tourist route, which is an attraction for visitors, the city also hosts many important cultural events.

These are, among others, the Festival Wschód Kultury—European Stadium of Culture, World Festival of Polish Folk Groups, International Song Festival Rzeszów Carpathia Festival, Concert of One Heart, One Spirit, Rzeszów Jazz Festival, Reggae on Wisłok, Rzeszów Breakout Days or Urban Space Festival. Rzeszów is also the venue for many sports events, such as the Rzeszów Marathon and Half Marathon, Rzeszów Rally, Podkarpacki Ultramarathon or Skoda Inter-Auto Rzeszów Streetball Challenge.

## HEALTHCARE\*

2017 | per 10,000 inhabitants

48 22

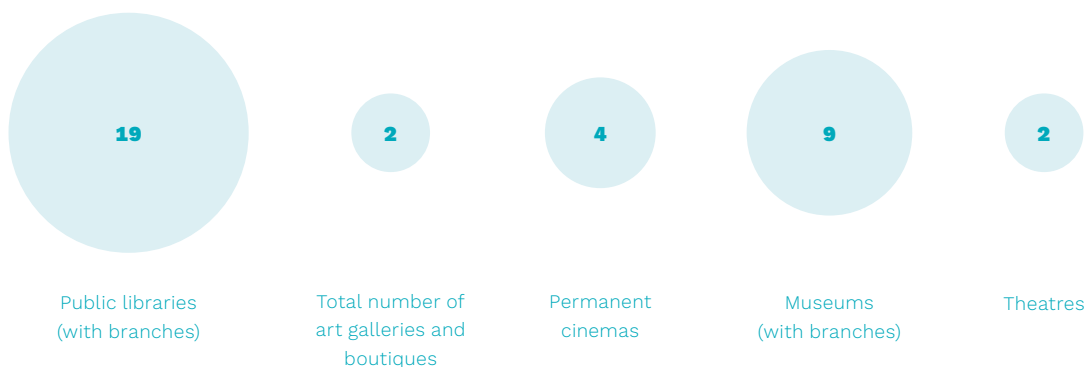
beds

doctors

\* data regarding

Podkarpackie voivodship

## CULTURE



Residents can also use numerous tennis and squash courts, modern SPA centres, karting tracks or golf and paintball courses located near the city. The residents of Rzeszow also have at their disposal a constantly modernized and expanded network of bicycle paths, which are already 153 km long.

## ENOUGH SPACE FOR EVERYONE

Jones Lang LeSalle estimates that the city already has more than 100,000 sqm of modern office space. Several interesting buildings are still under construction, such as Rzeszow Business Park or Resovia Office. The Rzeszow-based IT giant, Asseco Poland SA, is building a new headquarters for Asseco Innovation Hub—an innovative research and development centre. The swimming pools of the Rzeszow Sports and Recreation Centre have been reconstructed. And local developers have already built such large A-class office buildings as SkyRes Warszawska, with an area of over 20,000 sqm, where Deloitte, PwC, Mobic and Premium Mobile have their offices. Further investments are planned.

G2A Arena Exhibition and Congress Centre of Podkarpackie Voivodeship in Jasionka quickly found its place on the map of important economic events. It is a new, multifunctional facility in which the exhibition and congress parts can operate independently of each other or create a common space, depending on the needs. The facility is perfectly located, right next to the airport in Jasionka near Rzeszow.

The hotel base is developing very well. According to the data of the Marshal's Office of the Podkarpackie Voivodeship, in the middle of 2018, there were 30 categorized facilities in the city, offering slightly more than 2 thousand beds in 1,207 rooms, including 14 three-star and five four-star hotels. Interestingly, two of the Rzeszow hotels have a double category: Bristol Tradition & Luxury has 43 five-star rooms and 23 four-star rooms, while the Presidential hotel offers three—and four-star rooms.

"The Rzeszow hotel base is specific and dominated by private facilities. International chains include the Hilton Garden Inn and the Holiday Inn Express Rzeszow Airport. "For the time being, accommodation is used primarily by business, because the city is not a typical tourist destination," says Wojciech Dobrowolski, director of the newly created facility belonging to the Polish Hotel Holding—Holiday Inn Express at the Rzeszow-Jasionka Airport. "But while observing the development of the Aviation Valley, Rzeszow-Jasionka Airport and

**Specialist staff and a slightly lower average salary than in other cities encourage to start a business in Rzeszow.**

**Area covered by the zoning plan**

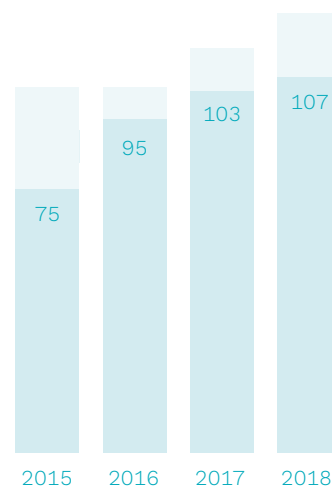
**16.8%**

big events taking place in G2A Arena, I can see a great demand for a typical business hotel located at the airport.”

Thanks to its location Rzeszów is becoming an important logistics hub. The city has already built 8 large logistics centers and more are under construction. In the spring of 2019 the construction of 7R Park Rzeszów, located in the immediate vicinity of the special economic zones and the Aviation Valley—the largest industrial cluster in Poland, began. The first building of 7R Park Rzeszów will be ready for use in the fourth quarter of 2019. Modern warehouses will be located only 6 km from the city centre.

“Rzeszów can boast a well-developed transport infrastructure and a high availability of qualified employees. The first lease agreement that has already been signed with a large logistics operator and the interest of the next ones confirm the attractiveness of smaller agglomerations and the fact that we adopted the right strategy by locating further 7R investments in such places,” says Bartłomiej Krawiecki, Member of the Management Board of 7R SA.

## MODERN OFFICE SPACE



## BIG COMPANIES NEED STARTUPS

Rzeszów actively participates in the development of the Podkarpackie start-up community. It enables people with business ideas to cooperate with city departments in the implementation of smart city projects, for example through the Rzeszów Start-up Accelerator acceleration program, implemented in cooperation with HugeTECH. “We provide young companies with support in the form of a series of training courses preparing them to enter the market. We also offer the possibility of individual consultations with experts selected according to the needs of a given project. The most promising ideas have a chance to obtain financing for further business development,” says Katarzyna Szewerniak, Marketing Director at HugeTECH, a company specializing in incubating and supporting the development of start-ups or combining technological projects with large companies.

The presence of giants, especially in the aviation industry, is creating a growing demand for the services of small, innovative companies.

The IDEA Global Accelerator, a three-year-long project aimed at supporting 48 beneficiaries, is also a springboard for innovative companies. Each of them may receive financial support in the amount of even PLN 200 thousand for the development of a product or service, as well as mentoring and consulting support

- Area covered by the zoning plan (in thousands of m²)
- Usable area under construction (in thousands of m²)

**The presence of giants, especially in the aviation industry, is creating a growing demand for the services of small, innovative companies.**

in the commercialization of the project. The Accelerator's partners include the Warsaw Stock Exchange, Samsung Electronics, Coface and Olimp Laboratories. Ideo, a Rzeszow-based IT company, is the author of the idea. The main industry paths within the IDEA Global program include: fintech, Internet of Things (IoT) and pharmaceutical biotechnology.

Another space for the development of young companies is Samsung Rzeszow Incubator, launched in cooperation with the Rzeszow University of Technology and the Aviation Valley. Individuals or teams that have already developed a business concept or a prototype of their product may come here. During a few-month-long incubation program Samsung provides creative space for work, the latest equipment, but also support of mentors and consultations with specialists. Within the framework of the incubator, participants can count on various types of training and assistance in finding financing and business or technological partners.

KWADRAT—Podkarpackie Creative Space, which hosts the most popular cyclical technological and networking meetings in the city, also provides young entrepreneurs from Rzeszow with an opportunity to develop. It also offers space to work together and private boxes where innovative ideas have been created for over 2 years.

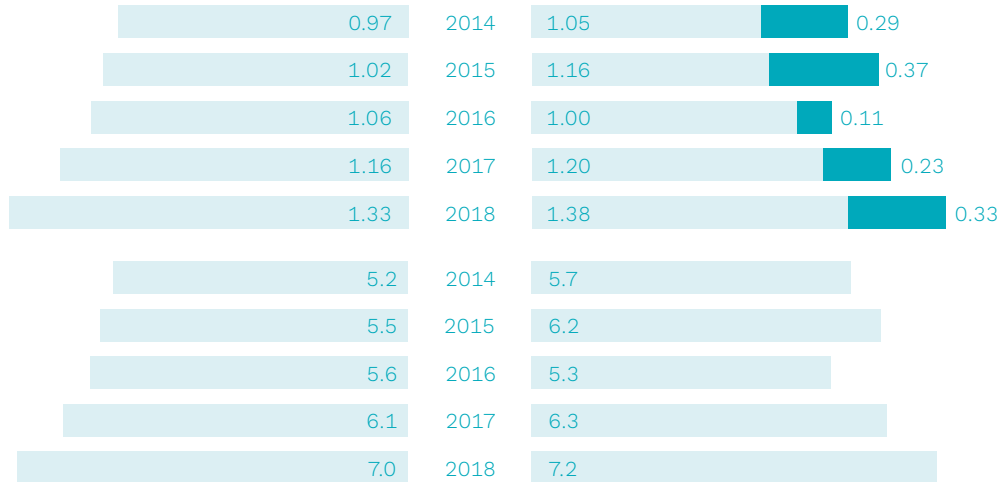
Asseco, which established the Asseco Innovation Hub in Rzeszow, also has extensive experience in cooperation with start-ups. "Nowadays, our clients expect more and more innovative and secure solutions from IT vendors. The Asseco Innovation Hub department provides a friendly environment for the development of innovative ideas and the possibility to transform them into commercial products and launch them on the market. The development of new projects takes place in four stages and lasts for a total of approximately 15 months," says Jarosław Bryl, managing director of Asseco Innovation Hub. "The establishment of AIH is the realization of our vision of how a large corporation should collaborate with start-ups."

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues (in thousands PLN per inhabitant)

Expenditure (in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

2017

**5**  
universities

**41,787**  
students

2018

**5**  
universities

**40,016**  
students

## BIKE ROUTES

(in km)



## ELECTRIC CARS

2018

**3**  
charging stations

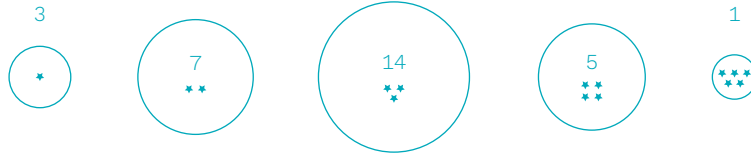


**HOUSING RESOURCES**

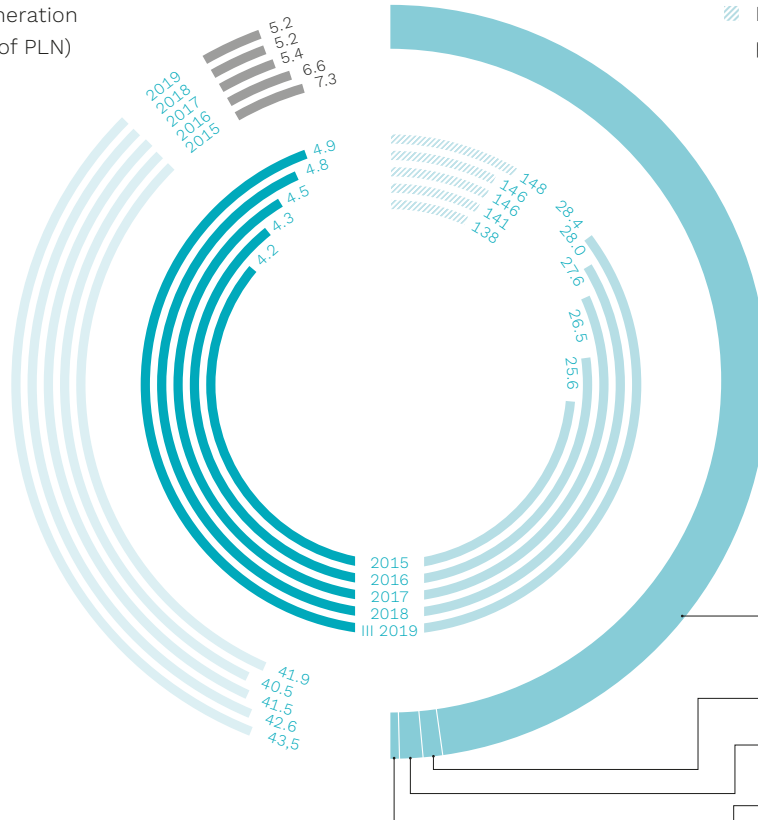
2017

**2,601**137 flats per  
10,000 people

2018

**2,307**120 flats per  
10,000 people**Completed  
flats****4.33%****of the city is covered  
by green areas**(maintained by the office  
of Zarząd Zieleni Miejskiej)**HOTELS****31****hotels with  
conference facilities**

- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)

**COMPANIES IN THE CITY**

- Enterprises operating in the city (in thousands)
- ▨ Enterprises operating in the city per 1,000 inhabitants

**2,333****new companies were  
registered last year****13.2%****of all the companies  
registered are  
foreign companies****COMPANIES  
ACCORDING  
TO EMPLOYMENT**

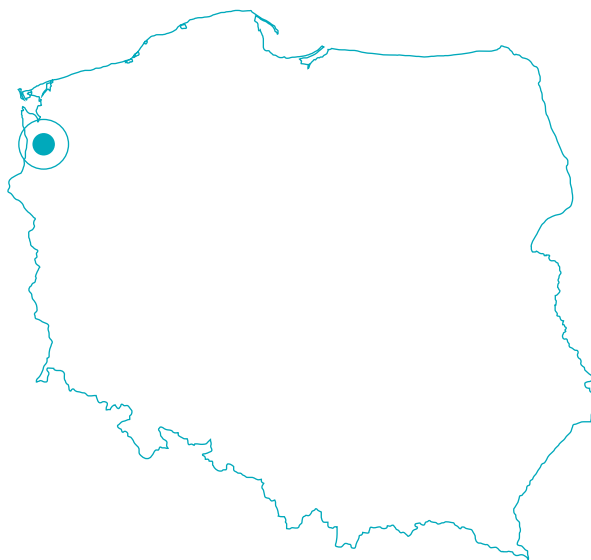
- 96.1%** of micro companies (up to 9 employees)
- 3.0%** of small companies (10–49 employees)
- 0.8%** of medium-sized companies (50–249 employees)
- 0.1%** of large companies (over 249 employees)

Sources: Central Statistical Office (GUS),  
survey conducted in the city, own sources









# SZCZECIN

Voivodeship	Zachodniopomorskie
Mayor	Piotr Krzystek
Area	301 sqm
Population density	1,347 people per sqm
Population	402,465
Granting urban rights	3.04.1243
Mirror reflection	Malmö
Aspiration	Copenhagen

## CONTACT DETAILS

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Marek Kubik, President of the Management Board  
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+48 91 333 97 71

# BORDERING ON GERMANY AND SCANDINAVIA

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## **PIOTR KRZYTEK, MAYOR OF SZCZECIN**

Szczecin is a modern metropolis that is not overwhelming and, at the same time, it is one of the greenest cities in Poland. You need just a few minutes from the very city center to reach truly wild nature. We have built the city around water and we fully exploit its advantages. This is noticed by, among others, entrepreneurs, who value Szczecin for non-existent traffic jams and a much more peaceful lifestyle. The number of companies operating in the city is constantly growing, which for me as the city's mayor is the greatest satisfaction.

## **MAREK SAMBORSKI, CEO OF GARO POLSKA**

Szczecin is an ideal location in many respects, easy access to the main communication arteries and ferries practically allows you to deliver goods to Scandinavia on the next day, and the dynamically developing region provides good access to suppliers. As the first investors in the economic zone, we could count on the support of the city hall, the Marshal's Office and the ARP.



## **SEBASTIAN MULIŃSKI, VICE PRESIDENT OF IAI**

Szczecin has a huge investment potential in terms of geography. But let's take a broader look at what Szczecin looks like, what its nature is like, how clean the air is—all this can be a great incentive to relocate employees to Szczecin. The city itself is compact. You don't waste a lot of time to get around, and on the other hand, the prices of flats and life are still attractive.

## **ŁUKASZ RAJECKI, PRESIDENT OF FOSFAN**

For years Szczecin has been one of the most dynamically developing centres of modern technologies and scientific-research centres, also in the chemical industry. We have a perfect location, and the multitude of investment areas and access from the water side make Szczecin even more competitive. A lot of greenery, no traffic jams, openness and friendly atmosphere are the advantages of this city.



The port, shipbuilding and shipping industries are traditional, although no longer dominant, economic areas of the capital of Western Pomerania. Next to them, the IT sector operates dynamically, business service centres have been established, and manufacturers operating in the field of biomedicine as well as logistics giants have built their plants. The biggest advantage of the city is its location. It is the only agglomeration in Poland lying practically on the border, a bridge not only with Germany, but also with Scandinavia.

The location alone is not enough, however. Sustainable investments are needed. It is primarily a large seaport and a road network. "The city has an excellent railway connection, also with the Western European motorway system via A6 and with new express roads and motorways in Poland via the S3 expressway. We also have good air connections," says Marek Kubik, President of the Agency for the Development of the Szczecin Metropolis. These assets are taken advantage of, among others, by the logistics industry. The e-commerce giants Zalando and Amazon have built their huge centres here. Thanks to these companies, among others, there are 6 logistics and industrial parks in Szczecin, and the two economic zones located around the city—in Goleniów and Stargard—virtually blossom.

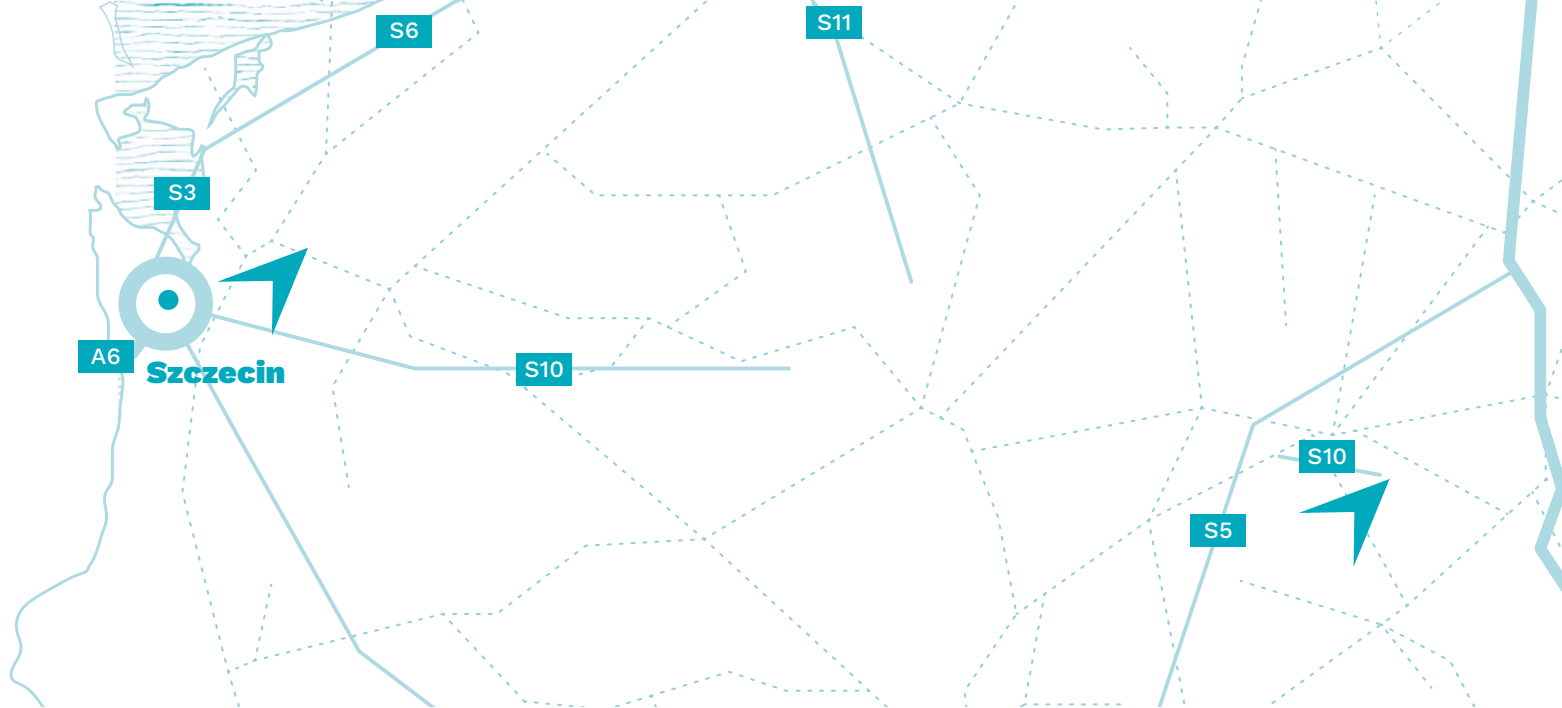
Other modern services have also appreciated the location and connections of the city with the rest of Europe. "Currently, there are 43 service and business centres operating here," says Piotr Krzystek, Mayor of Szczecin. The IT industry, which specializes in creating software for the automotive industry, has a strong position here. In this respect, Szczecin is one of the largest centres of this type in Poland and Europe. On the other hand, the IT sector employs 2.5 thousand people in the city. It is in Szczecin where the Internet service provider—home.pl—has its registered office.

The capital of Western Pomerania has been associated with the Baltic Sea and the navigable Oder River for centuries. "Maritime economy, although not on such a scale as it was a dozen or so years ago, still plays an important role in Szczecin. Many private entrepreneurs who offer world-class modern products and services successfully operate here," says Mayor Piotr Krzystek.

Most of the Polish merchant fleet is based in Szczecin—the state-owned Polish Shipping Company and the private Euroafrica Shipping Lines. There are also shipyards here, including the Gryfia Repair Shipyard and the Szczecin Shipyard. The latter entity serves as an industrial park, where several dozen companies providing various shipbuilding services operate. "Szczecin's companies most often manufacture hulls or individual ship's blocks, less often 'turnkey' construction," says Arkadiusz Świech, the proxy of Finomar.

The heart of the maritime economy is the port connected with Świnoujście, which is located to the North of Szczecin. Together, they operate as the Szczecin Świnoujście Seaport Authority. It is a universal port: general cargo accounts for 47% of transshipments, mass solids to 39% and mass liquid to 14%. In 2018, it closed the year with a result of 28.6 million tonnes and an increase of 12.5% in relation to 2017.

**The port, shipbuilding and shipping industries are traditional, although no longer dominant, economic areas of the capital of Western Pomerania.**



224 km

**hard surface public  
roads per 100 km<sup>2</sup>**

## PORT, ROADS AND BERLIN

Szczecin is the best connected Polish city with the countries of Western Europe. The A6 motorway leads from the city centre to the border with Germany, which is just a few kilometres away. The A11 road takes you to the centre of Berlin within 90 minutes. An important southern artery—S3, running from Świnoujście to Lubawka, located on the border with the Czech Republic also goes through Szczecin. Szczecin Goleniów Airport is 40 km away from the city. It can be reached by the S3 road or rail. The airport offers 11 permanent connections, mainly with Warsaw, but also with Dublin, Copenhagen and London. However, the proximity of Berlin means that Szczecin's inhabitants intensely use the local airports Berlin Schoenefeld and Tegel. From Szczecin you can get there not only by train but also using a regular bus connection.

Szczecin has a large sea port, connected by a waterway with Świnoujście and the Baltic Sea. Its length is 67 km, and it runs across the Oder River and the Szczecin Lagoon, and can be used by ships with a draught of up to 10.5 meters.

The Szczecin agglomeration also has a railway junction. In 2022 the Szczecin Metropolitan Railway (120 km long with 40 stops) is to be launched..

- motorways and expressways
- - - railways
- ↗ airport
- railway station



Aglomeracja szczecińska to także węzeł kolejowy. W 2022 roku ma wystartować Szczecińska Kolej Metropolitalna (długość 120 km i 40 przystanków).

## EVERYTHING FOR BUSINESS: FROM CONSULTANCY TO A LOAN

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The Agency for the Development of the Szczecin Metropolis is responsible for supporting business in Szczecin. It provides guarantees to secure loans and supports potential investors. It helps in the search for employees, guides the circulation of documents, organizes promotional meetings, and also helps in finding the right property.

Entrepreneurs who decide to start a business in Szczecin can choose between the Pomerania Technopark operated by the Szczecin Science and the Technology Park. It is a complex of facilities where projects supporting the development of companies are executed and start-ups are born and developed, with particular attention to the ICT sector. Currently there are 64 companies operating in the park. "Since the beginning of its activity, over 100 companies from the ICT sector have been operating in the Pomerania Technopark," says Andrzej Fetorowski, President of SPNT.

The ICT Cluster, which brings together the IT industry, also has its seat here. It includes 85 companies in Western Pomerania with 60 from Szczecin. The sector employs 5 thousand people. "Within the framework of creating an ecosystem for IT companies Technopark Pomerania cooperates with schools and universities in the field of modernising the education of IT specialists and with local authorities in the field of taking into account the needs of IT companies in planning the economic policy of the region," says Andrzej Fetorowski.

Szczecin actively participates in financial programs for business. Support is possible at practically every stage. Starting from the grant from the poviát employment office to set up your own business, through obtaining grants under the RPO WZ framework for the years 2014–2020, to a loan from the Szczecin Loan Fund. This institution, established in 2004, supports micro, small and medium enterprises. "Since the beginning of our activity, we have granted 420 loans amounting to over PLN 126 million" says Krzysztof Nowak, President of the Szczecin Loan Fund.

Szczecin's entrepreneurs are associated in chambers, the largest of which—not only in Szczecin, but also in Poland—is the Northern Chamber of Commerce. It has over 1500 members. The Polish-Scandinavian Chamber of Commerce with its seat in Warsaw, which unites over 60 companies from Szczecin and Western Pomerania, is also very popular.

**Assistance with selecting real estate, help in searching for employees. These are just some of the services that urban agendas provide to entrepreneurs.**

## FOR SEAMEN AND BIOMEDICINE

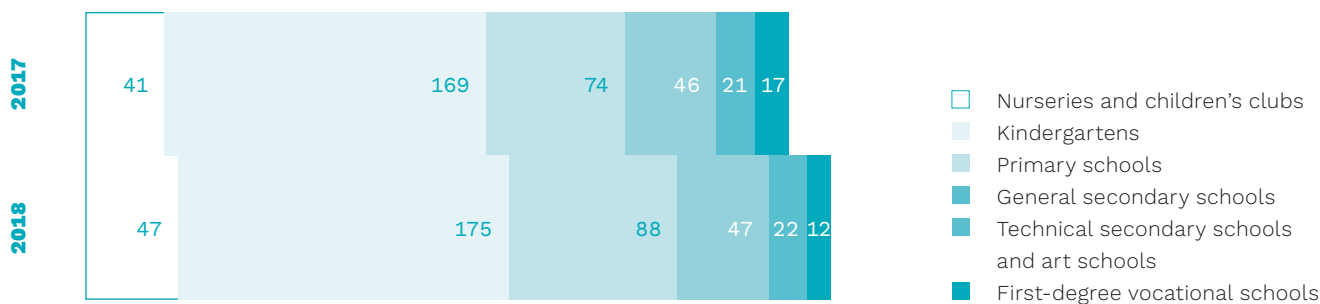
The biggest university in the city is the University of Szczecin. This relatively young university, which has been operating for over 30 years, today educates 14 thousand people in 70 fields of study. The West Pomeranian University of Technology has a longer tradition and was established as a result of the merger of the Agricultural Academy and the Szczecin University of Technology. It has 7.8 thousand students. The most popular faculties are computer science, automation and robotics. Companies from the construction, chemical, IT, production engineering, logistics, renewable energy sources and biotechnology sectors in particular can count on fresh staff from here.

“For many years ZUT has been putting great emphasis on cooperation with business, both global and regional. We cooperate with such giants as Samsung, with which for five years now we have been running a joint course for students, or with Grupa Azoty. In this case, together with the Chemical Plant in Police, we cooperate both in the field of education and research,” says Prof. Jacek Wróbel, Rector of ZUT. The University—observing changes on the market—is trying to adjust to them on an ongoing basis, introducing new fields of study. This year, we debuted in the field of combat and special vehicles engineering and nanobioengineering. The Career Office, which connects graduates with companies, and the Regional Centre for Innovation and Technology Transfer, which provides services for business, operate here. All faculties have special councils for cooperation with the social and economic environment, whose aim is, among others, to adjust education to the needs of the market.

“We are involved in more and more projects implemented by companies. We are also constantly looking for contractors that would be interested in the solutions emerging at the university, such as inventions or know-how. We use for this purpose, among others, presence at industry events or cooperation in national and European networks

**15 universities, an extensive network of vocational schools and the best high school in Poland—this is where the highly qualified staff entering the labour market comes from.**

### EDUCATION



associating institutions acting for the benefit of enterprises,” says Prof. Jacek Wróbel.

The Maritime Academy is a unique university. It is a school that educates highly qualified staff for commercial fleets—future officers working on board (navigator officer) and under it (mechanic officer). Unlike many other countries where learning takes place through courses, the Maritime University prepares its students for work at sea during five years of study.

“Due to our unique, highly specialized character we cooperate with shipowners and companies from the industry,” says Prof. AM, dr hab. Eng. captain Wojciech Ślęczka, Rector of AM. “This allows us to adapt our training facilities and the graduate model to the needs of the market.

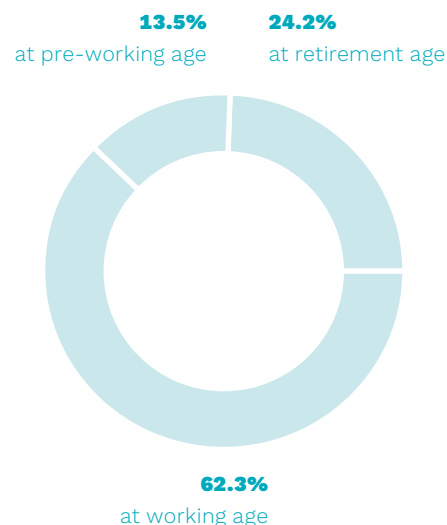
The prestige of the university goes far beyond Szczecin. Out of the 3 thousand people currently studying, many come from other parts of Poland, but also from abroad (10%), including Canada, Italy, Tunisia, Congo and Indonesia. The studies are conducted in English. “The number of foreigners interested in our studies is on the rise, which makes us happy,” says Dr. Agnieszka Deja, Vice-Rector for teaching process at the Maritime Academy. “We cooperate with universities in the world and in the future we will conduct student exchanges with universities from China or Croatia.”

According to estimates, currently over 35,000 students study at 12 universities in Szczecin. 1,400 of them are foreigners who willingly chose not only the Maritime Academy but also the Pomeranian Medical University. Since 1996, classes have been held in English at the faculties of medicine and dentistry, and the university has also implemented a programme addressed to German students. PUM is a strong base for business. It is here that Professor Jan Lubiński, a geneticist, developed innovative tests to detect gene mutations that cause cancer and created the world’s largest register of people with BRCA1 gene mutations, which increases the risk of developing breast and ovarian cancer. Thanks to the research at PUM, the International Centre for Heritable Cancer was established and its commercial tasks are carried out by Read Gene company..

However, good education should be started earlier. One of Szczecin’s secondary schools—XIII High School is considered to be the best in Poland. In the annual prestigious ranking of secondary schools in Poland, it took the first place most times and also won the title of the school of the last twenty years. The best universities in the country are very much interested in the graduates of this high school.

An important background for the economy is extensive vocational education. In Szczecin there are 12 vocational schools and 1 independent technical school. Dual education is of great importance. It is addressed to students of vocational schools, primary schools and vocational training centres. In such a system, students gain knowledge in general subjects at school, and practical teaching is carried out directly by the employer, so that they have contact with technological processes. A dual education school reacts quickly to market demands. In this way, students of the Craft School Complex in Szczecin can choose from 61 professions for which there is a demand on the market.

## POPULATION



## GREEN CITY ON THE WATERFRONT

Today, air quality is a basic indicator of quality of life. In this field Szczecin stands out from the rest of the country. "Air quality, especially when compared to other cities, is very good here," says Piotr Krzystek, Mayor of Szczecin. "However, recently we have started to pay even more attention to air quality in our city. The fact that it is not bad in comparison with the rest of the country does not mean that it cannot be much better. That is why we spend large amounts of money on investments in environmentally friendly urban transport. Under the "Climate for Health" project and the "Seagull" programme, we subsidise replacement of heating stoves with more ecological and friendly sources of heat. We run a huge programme of planting trees and shrubs in urban space. We install photovoltaic panels on our facilities. Szczecin is a green and friendly city, so we do everything we can to keep it that way," he says.

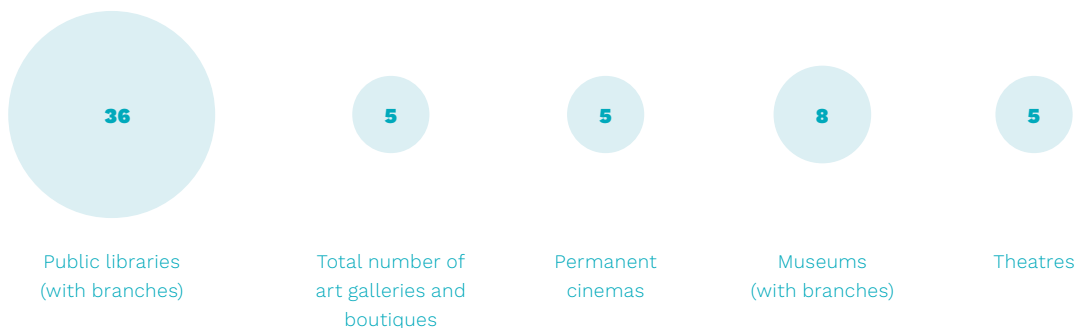
Szczecin is certainly favoured by nature—it is surrounded by large water reservoirs, forests, and not far from here—there is the Baltic sea. Besides, Western Pomerania is the most forested region in Poland, and Szczecin itself has an above-average number of parks, avenues and flower beds, also in the very center of the city. Last year alone, under the "Platan" programme, 2.5 thousand trees and shrubs were planted in 100 places. For years, the city has been implementing the Floating Garden strategy, the key elements of which are water and greenery.

"The key is to be aware that taking care of the environment will guarantee us and our children a friendly and clean living space. That is why, not without reason, our Floating Garden strategy is about respecting the nature around us. We are not afraid to take actions aimed at ecology, because we know how valuable it is for the residents to have close contact with nature," says Piotr Krzystek.

"The biggest ecological investment of the city in the last decade is EcoGenerator, i.e. Thermal Waste Disposal Plant, one of the most modern incineration plants in Europe, transforming 150 thousand tons of rubbish annually into energy. It provides electricity to 30,000 people

**Most greenery and water, most sailing marinas, the biggest tennis tournament in Poland, modern technologies and clean air. Szczecin is not only a comfortable, but also a healthy place to live.**

## CULTURE



per year and heat to 30,000 flats. For several years now, the city has also been developing a network of ecoports. These are places which accept waste that is not eligible for standard segregation. Currently, the construction of the ninth point is underway.

Szczecin introduces innovations that help its inhabitants in their everyday life. Great emphasis is placed on communication. The residents have Szczecin Fast Tram and modern bus fleet at their disposal, including low-emission hybrid buses. Now the city is planning to buy electric vehicles. In 2018, the first city stations for charging electric cars appeared, and for years traffic in the city centre has also been adjusted to the needs of cyclists, among others thanks to contraflow lanes. It is not surprising that the city bike system and intelligent street lighting management system operate successfully. Selected lamps can be switched on, off or dimmed to a certain level at any time, depending on the occasion, time of day or season. But that's not the end of urban experimentation. At the beginning of 2018, a pilot programme was carried out to investigate the phenomenon of the urban heat island. The basic scope of the pilot included remote, automatic temperature measurement in 10 points of city space, data transfer, data recording in a database and visualization in a dedicated tool application.

"Szczecin is a smart city. We are committed to providing the best possible services to residents and guests, so we try to implement smart solutions in virtually every area. We are the first city in Poland to implement a remote lighting management system Philips City Touch," explains Piotr Krzystek. But being smart is not only about technologies, it is also about the quality of public space. This is where the Szczecin Philharmonic, or more precisely its headquarters, which is a contemporary icon of the city, comes to the fore. Designed by Estudio Barozzi Veiga from Barcelona, the unique facility was built in 2014 at the cost of PLN 100 million and has won many global awards."

The youngest Academy of Art in Poland is located near the Philharmonic. Established only nine years ago, it has not only a modern base, but also the only art school in the country that combines visual arts with music. The Szczecin opera, which in 2015 received a new seat for PLN 80 million, also has some modern facilities, one of the best in Europe. Soon, one the two main theatres in Szczecin—Teatr Polski will undergo a complete reconstruction. An innovative Marine Science Centre, similar in scope to the Copernicus Science Centre in Warsaw is being built in Łasztownia, a former industrial quarter.

Szczecin is also a perfect place for sport. The city has some leading first-class sports teams in most disciplines, and the most famous sports brand is the football Pogoń Szczecin. But tennis is also very important. The biggest men's tournament in Poland—Pekao Szczecin Open—has been held here for 27 years.

Due to its location, Szczecin also invests heavily in sailing. Thanks to the creation of two modern city marinas and the newly built marina

## HEALTHCARE\*

2017 | per 10,000 inhabitants

46 25

**beds**

**doctors**

\* data regarding

Zachodniopomorskie voivodship

at the hotel and conference complex, the city was ranked first in Poland in terms of the number of berths for yachts. Szczecin is also the main point of the Zachodniopomorskie Sailing Route, which has been built for years—it comprises nearly 40 modern marinas and 380 km of sailing routes.

**Area covered by the zoning plan**

**53.6%**

## THE LOGISTICS INDUSTRY CHOOSSES SZCZECIN

Although the Szczecin office market is the smallest one when compared with other major agglomerations in Poland, it can boast one of the largest development potential. According to a report by Colliers International, it recorded the lowest vacancy rate in the country (5.1%) in 2018, and it also offers very attractive rental rates (11 to 14 euros per square meter).

“The interest is enormous,” says Michał Przepiera, Deputy Mayor of Szczecin. “Many of the companies already operating on the Szczecin market are planning to move to larger facilities within the next two years. To a large extent, this is related to the planned increase in employment. We already have one of the lowest unemployment rates and the demand for employees is not decreasing. There are also enquiries from potential investors looking for locations for new projects.

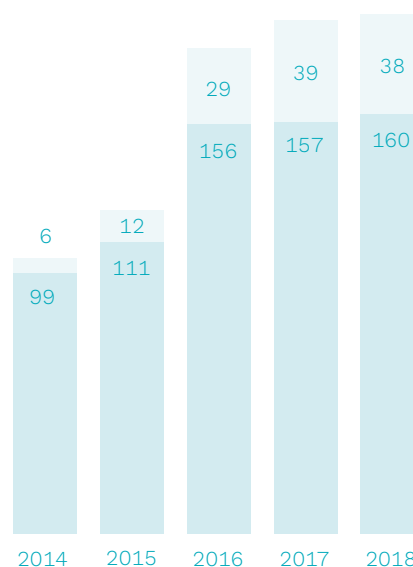
Currently there is 160,000 sqm of office space in Szczecin. Another 44,000 sqm is under construction. Poseidon, located in the very centre of the city, deserves a special mention among the newest buildings. It will include 18,000 sqm of office space, a congress centre and two Marriott hotels—a three-star Moxxy and a four-star Courtyard. The new hotels show that the hotel and congress industry is also developing strongly. Western Pomerania, whose capital city is Szczecin, is the Polish leader in terms of the number of overnight stays. Last year, their number amounted to over 15 million, by far more than in all the other regions. Szczecin itself ranked 23<sup>rd</sup> among poviats with 924 thousand overnight stays. In the city there are mostly 2-star and 3-star hotels.

The warehouse base is also developing intensively, Szczecin already has the largest hall area in Northern Poland, and potential investors are still awaiting well-connected areas, including industrial areas, such as the Szczecin Euro-Park Mielec Subzone.

“Other interesting areas in Szczecin are the areas around the port, characterized by a valuable, developed infrastructure, as well as Kołbaskowo near Szczecin, adjacent to the Polish-German border, in which Amazon invested a few years ago,” says Marek Kubik, President of the Agency for the Development of the Szczecin Metropolis. Prices of industrial and warehouse land are among the lowest in the Polish agglomerations, in 2018 they ranged from 20 to 40 Euros.

**160,000 sqm of office space, another 40,000 sqm under construction—these are the city’s assets for potential investors.**

### MODERN OFFICE SPACE



■ Area covered by the zoning plan (in thousands of m²)  
■ Usable area under construction (in thousands of m²)



## MASTERS OF VIRTUAL REALITY

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The “breeding ground” of many new and successful companies is the municipal Technopark Pomerania. Today 64 start-ups and more mature companies, mainly from the IT sector operate there. This is where the wedding.pl platform, the largest virtual wedding organizer in Poland, is created, and wspieram.to—a social financing portal. A strategic tenant is Sagra Technology, supplier of technologies supporting companies in the field of strategy building, management and analysis of business activities. But there are also others who have something to boast about, such as Consileon Polska that designed and implemented the system for one of the European leaders in the banking industry. It was the first project of this kind in the world, currently used in financial institutions from Hong Kong to New York. Tenoite, in turn, is the creator of solutions used by the largest Hollywood film studios, such as Paramount Pictures, Warner Brothers, Sony Pictures Entertainment, Universal Studios and 20<sup>th</sup> Century Fox.

Because there are reasons to be proud of, the city tries to support start-ups not only by providing infrastructure and services for the Technopark, but also by running additional programs. This year a new mentoring project was announced—Szczecin\_UP! It attracted a lot of interest and there were 69 applicants.

Szczecin's universities have plenty of good ideas. Paweł Fornalski graduated from the Szczecin University of Technology and Sebastian Muliński from the Szczecin University. Together they founded IAI SA, which today is a real tycoon when it comes to developing solutions for the e-commerce market. Their mechanisms are used by several thousand online stores in Poland, including recognized brands.

On the other hand, Pixel Legend, which was founded by Jan Flipowski, a graduate of the University of Szczecin and the West Pomeranian University of Technology, successfully creates programs in the field of virtual reality (VR) and augmented reality (AR). The company has also created, among others, a virtual interior program for architects and an application for tourism, thanks to which you can move into the virtual past in a chosen place. Autocomp Management, founded in 1989 by five engineers, employees of the Szczecin University of Technology, has a much longer history. It produces, among others, advanced systems for the army—battlefield simulators and even tanks. As you can see, Szczecin offers a good ground for innovation, and educated and bold people take care of the rest.

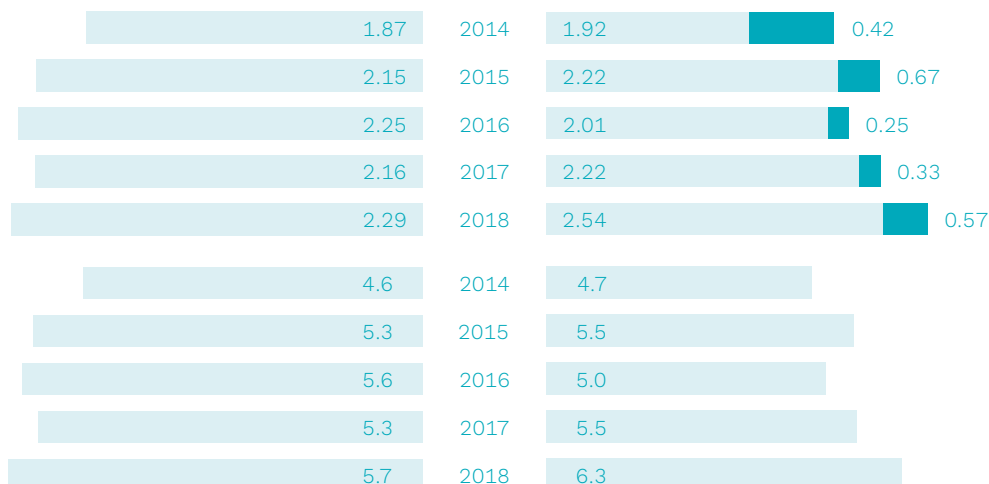
**Modern technologies and the IT sector are steadily increasing their share and importance in the Szczecin's economy. The once small businesses or start-ups have become competitors for European giants.**

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues (in thousands PLN per inhabitant)

Expenditure (in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

2017

2018

**12**  
universities

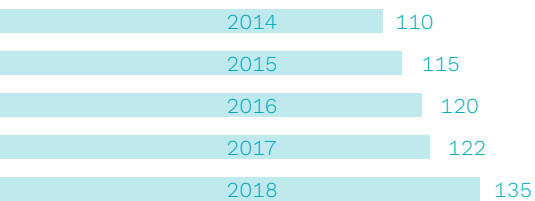
**37,254**  
students

**12**  
universities

**35,043**  
students

## BIKE ROUTES

(km)



## ELECTRIC CARS

2018

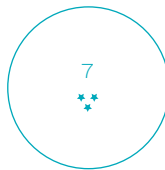
**18**  
charging station

**HOUSING RESOURCES**

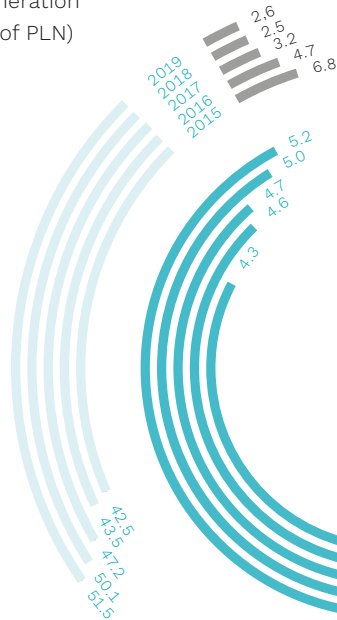
2017

**2,662**66 flats per  
10,000 people

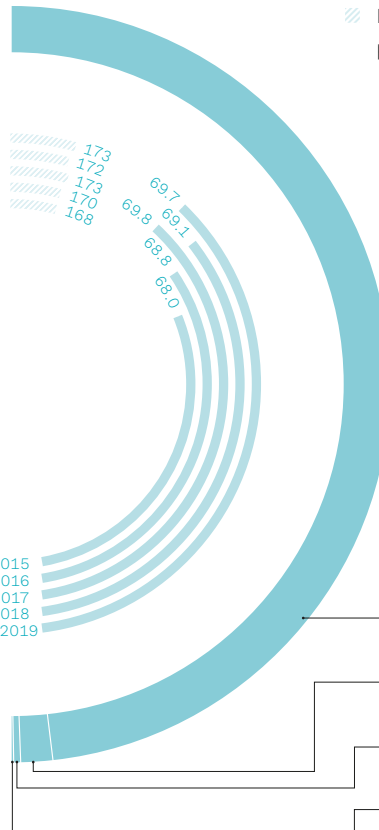
2018

**2,300**57 flats per  
10,000 people**Completed  
flats****17%****of the city is covered  
by green areas****HOTELS****22****hotels with  
conference facilities**

- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)

**COMPANIES IN THE CITY**

- Enterprises operating in the city (in thousands)
- ▨ Enterprises operating in the city per 1,000 inhabitants

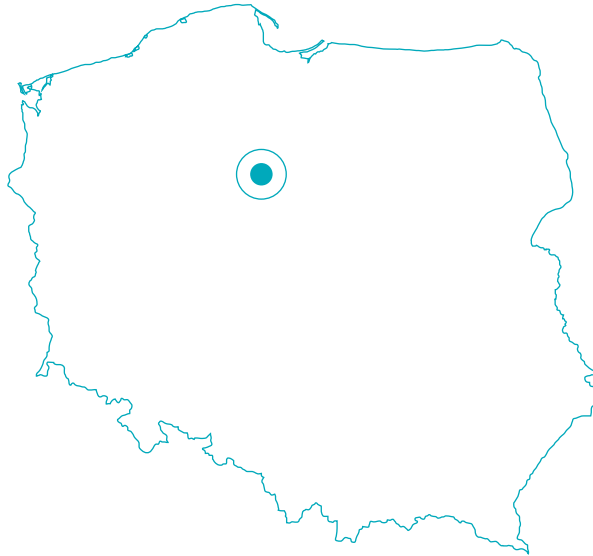
**5,561****new companies were  
registered last year****20.8%****of all the companies  
registered are  
foreign companies****COMPANIES  
ACCORDING  
TO EMPLOYMENT**

- 96.7%** of micro companies (up to 9 employees)
- 2.7%** of small companies (10–49 employees)
- 0.5%** of medium-sized companies (50–249 employees)
- 0.1%** of large companies (over 249 employees)

Sources: Central Statistical Office (GUS), survey conducted in the city, own sources







# TORUŃ

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Voivodeship	Kujawsko-Pomorskie
Mayor	Michał Zaleski
Area	293 square km
Population density	1,705 people per square km
Population	202,740
Granting urban rights	28.12.1233

## CONTACT DETAILS

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Business Support Centre in Toruń  
Łukasz Szarszewski—Director  
kontakt@torun.direct  
+48 56 611 89 30

# TORUŃ—A GREAT CITY TO LIVE IN AND DEVELOP BUSINESS

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## **MICHAŁ ZALESKI, MAYOR OF TORUŃ**

For many years now Toruń has been at the forefront of the rankings of Polish cities, which take into account the economic potential, human capital and quality of life. Businessmen, residents and guests appreciate the low cost of living, good communication and attractiveness for entrepreneurs. Another advantage is its good location—proximity to Tricity or Warsaw and good transport connections thanks to the A1 motorway. Last but not least one cannot forget about the Nicolaus Copernicus University, which educates specialists for the local labour market.

## **JAROSŁAW JÓZEFOWICZ, CEO OF TZMO**

We are proud that the name of our company helps us emphasize that we come from Toruń. Cooperation of TZMO with the authorities of Toruń and the academic community has a huge impact on our dynamic development. People are the driving force behind every business. Due to the fact that Toruń is an academic city, we are sure that we employ the best talents who contribute to the development of our brands in Poland and globally.



## **MIROSŁAW KLEPACKI, CEO OF APATOR**

For a company which, like Apator, builds its competitive advantage on development of innovative products and production automation, investment support offered by the Pomeranian Special Economic Zone, where we currently operate, is very important. We cooperate with the authorities of Toruń, institutions and universities, and most of our qualified staff are from Toruń.

## **PIOTR SUCHARSKI, CEO OF NEUCA**

When I came to this city because of my professional arrangements nearly 20 years ago, I didn't know anything about it. I met wise, hard-working and kind people here. Together, we have built a company which, today, is one of the leaders on the health care market in Poland. Thanks to the fact that Toruń is a beautiful and friendly city, we have managed to attract managers from other parts of Poland.





First of all, good location. The proximity of Tricity or Warsaw and good communication with these metropolises is the most important asset of Toruń, which investors pay attention to. Attractive prices of real estate are also tempting. It is impossible to ignore the importance of universities, including the largest one—the Nicolaus Copernicus University—which every year provides the market with almost 7.5 thousand well-educated graduates.

What else contributes to the business attractiveness and potential of Toruń?

For Łukasz Broniszewski from the Stabilo Foundation operating in Toruń, which deals with social and professional activation of people at risk of exclusion and building civil society, the answer to this question is simple: “I think that this potential lies primarily in socially active people who want to participate, for instance, in consultations and act for the benefit of their city,” he believes.

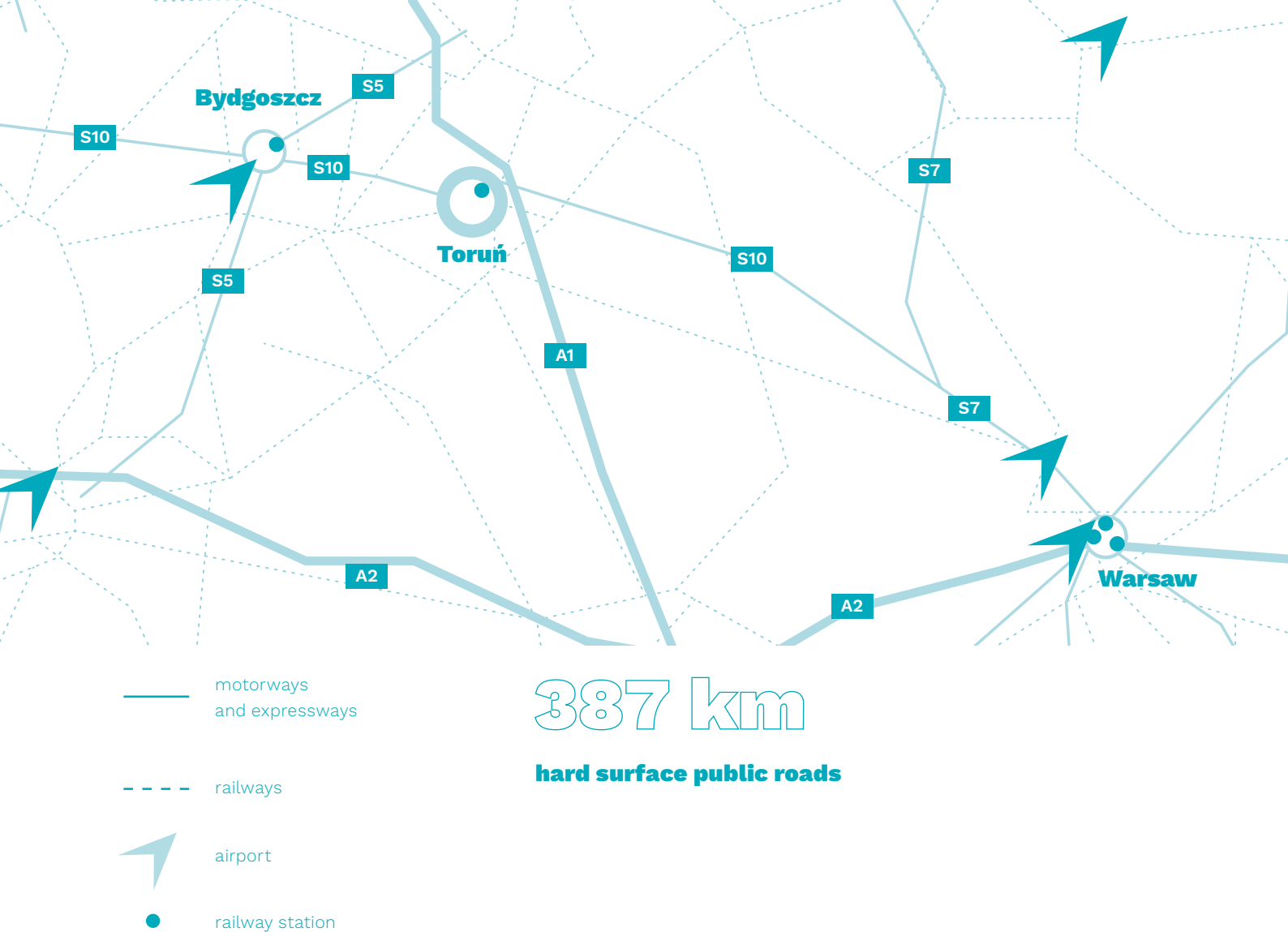
Thinking about business in Toruń, one should not forget that it is a “slow” type of city with a slower pace of life. For those working in large agglomerations, tired of the constant haste and the hustle and bustle of the city, this may be the main argument to move here.

Flat prices, which in October 2019 amounted on average to PLN 5850 per square meter, may also attract people to Toruń. In the ranking of Polish Cities of the Future 2017/2018, prepared by fDi Intelligence, Toruń ranked among the five most attractive medium-sized cities in two categories. Its potential in terms of human capital, quality of life and attractiveness for business was noticed.

Fifty cities from all over Poland were analysed in the ranking, so the success of Toruń is beyond a shadow of a doubt. In the city and around the city, especially in the Pomeranian Special Economic Zone, modern factories are located, which produce, among others, home appliances, the IT sector is developing rapidly, and well-educated staff is provided by the universities located in Toruń, which are increasingly effectively cooperating with entrepreneurs. Due to its location at one of the main communication routes, the Toruń agglomeration is becoming one of the most important points on the logistic map of the country.

At the same time, the average salary, which is lower than in the capital city or Tricity (in 2018 it amounted to PLN 4.6 thousand in Toruń) and the unemployment rate (4.1% in August 2019) prove that the city has not yet exhausted its reserves. Today's Toruń is a city of constant change. Over the 15 years of Poland's presence in the European Union, Toruń has transformed itself in an unprecedented way in its history (it invariably ranks high in the top rankings of centres using EU funds most effectively). Also in the region, it is the leader in terms of the amount of obtained funds. In 2018 alone, 125 contracts for co-financing of projects were signed, the total value of which exceeded PLN 1 billion.

**Toruń awaits  
and welcomes  
all the companies  
looking for  
an alternative  
to Warsaw,  
Krakow  
or Tricity.**



## TWO HOURS TO GET ANYWHERE

Toruń plays an important role as the main transport hub in the Kujawsko-Pomorskie Voivodeship. Four national roads currently converge in the city. A1 motorway, which is a communication link with the north and south of the country, and provides quick access to the airport in Gdańsk also runs through the city.

Road transport is complemented by the S10 expressway, which is the southern ring road of the city. Thanks to that, in less than two hours you can get from Toruń to Gdańsk and Łódź. You will need a little more, two and a half hours, to get to Warsaw.

The inhabitants of the birthtown of Nicolaus Copernicus have no reason to complain about the railway connections either. From Toruń you can easily get by train to the largest cities in Poland: Warsaw, Tricity,

Katowice, Kraków and many smaller towns. Toruń is one of the most important railway junctions in the region, and the city is located along the railway line no. 353 (Poznań-Inowrocław-Toruń-Olsztyn-Korsze) running from the western to the eastern border of Poland.

The nearest passenger airport is located about 50 km away, in Bydgoszcz. The airport in Gdańsk is about 175 km away from Toruń. The city has a civil airport, operated by the Pomeranian Aeroclub. It can be used by business planes providing general aviation services.

## INVESTOR IS NOT ALONE

Toruń's approach to investors is not complicated. Everything is handled by the Business Support Centre, whose tasks are clearly defined. "We promote the investment offer of the city, encourage investment and, above all, attract new investors to Toruń, which is our main objective," says Łukasz Szarszewski, Director of the Centre. "We offer assistance to investors along the entire investment process, from finding a location, through obtaining the required permits, to recruiting employees."

The city, through the Centre, supports entrepreneurs also in the promotion of areas designated for investments. It is worth knowing that by the end of the year it plans to have sold 36 plots of land with a total asking amount of almost PLN 60 million. The total area of plots is over 48 ha. Most of them have been allocated for investment such as services, production, storage and warehouses. The Toruń Regional Development Agency also has its offer for investors. TARR offers land belonging to the Toruń Technology Park and located in the left-bank part of the city, close to the S10 route.

In total, it is 16.83 hectares divided into 33 plots. Roads and the necessary media are available. All the plots are undeveloped.

The business environment institutions operating in Toruń perfectly fit in with the expectations of investors. Apart from investment areas, the Toruń Technology Park offers office space on preferential terms, assistance in establishing cooperation with business networks and scientific institutions as well as training and consulting.

It is best known for its first data processing centre in Poland—Exea Data Center. Tomasz Urbanowicz, Director of TPT, emphasizes that it is here that the idea of building a data center designed specifically for cloud solutions was implemented for the first time in Poland. This allows TPT to offer cheaper, faster and more efficient services. The proposed solutions are based on technologies and know-how of world leaders in the ICT industry.

The city has successfully used EU funds for activities aimed at increasing the investment attractiveness of Toruń. It develops new investment areas, implements projects promoting economic potential, and initiates innovative tasks to support small and medium enterprises. A particularly interesting example is "Toruń Space Labs"—a project whose aim is to create space for the space industry in Toruń. For

**Entrepreneurs planning to invest in Toruń can count on comprehensive assistance in carrying out their project. The city cooperates with them at every stage of its implementation**

this purpose, a facility with modular laboratories, research rooms and multimedia studios will be created, technologically adapted to carry out development work, such as the preparation of exploratory robots, testing the durability of materials or the use of 3D printing for prototypes and telemedicine.

## EFFECTIVE PATENTS FOR DEVELOPMENT

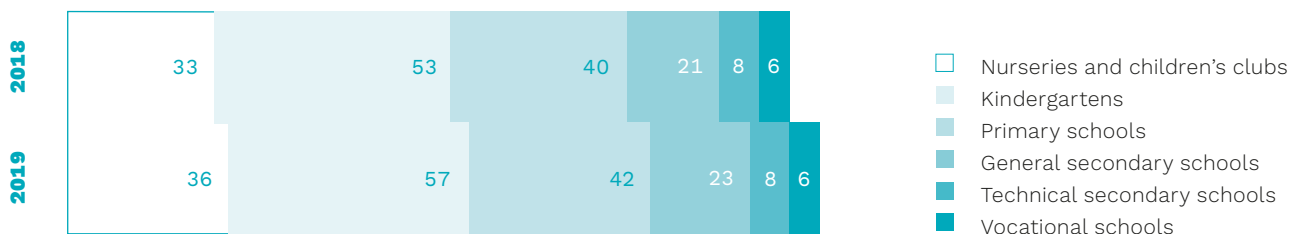
Future staff are educated, among others, by the Nicolaus Copernicus University. It is one of the largest universities in Poland, both in terms of the number of students and offered faculties. The Nicolaus Copernicus University, which as one of only 10 universities in Poland has obtained the status of a research university in the competition of the Ministry of Science and Higher Education, and can boast a rich offer, is currently attended by over 20 thousand students.

For many years, the offer of the Nicolaus Copernicus University has been adjusted to the expectations of the labour market, institutions employing graduates and new civilizational challenges. This is possible thanks to the broad cooperation with both domestic and international business. One can find plenty of examples of such cooperation. It is enough to take a look at the Faculty of Economic Sciences and Management, which is constantly developing cooperation with dynamically operating companies from the country and the region. Partner companies form the Advisory Council of Business Representatives at the department. Contacts with enterprises enable students to take part in numerous lectures and workshops conducted by experienced managers, as well as internships.

The Faculty of Chemistry cooperates, for example, with several large chemical companies, including Ciech and Anwil, but also with smaller companies developing modern technologies, such as Biogas Investor.

**The demand for employees in the city is growing. And employers appreciate that almost 30% of Toruń's population aged 25-29 have higher education.**

### EDUCATION



The Faculty of Physics, Astronomy and Applied Informatics of the Nicolaus Copernicus University, which is among the top five science departments in Poland (out of 26 evaluated units), also cooperates with business. In recent years, the department has managed to gain about PLN 80 million for research, including research projects conducted in cooperation with the industry and ending with implementations. The biggest achievement in terms of deployment was the commercialization of the SOCT spectral optical tomography, which was recognized by government experts as one of the three “Polish photonic products that reached the global level and commercial success on the global market”. The vast majority of patented inventions created by WFAiIS employees are commercialized already at the stage of invention ideas and purchased by private companies.

The Faculty of Law and Administration, on the other hand, using the rich practical experience of its former and current employees: legal advisers, judges, lawyers, experts and expert witnesses, cooperates with the most important state institutions, including, for example, the Public Procurement Office. It also has extensive contacts with legal self-governments, which are involved in the process of educating students.

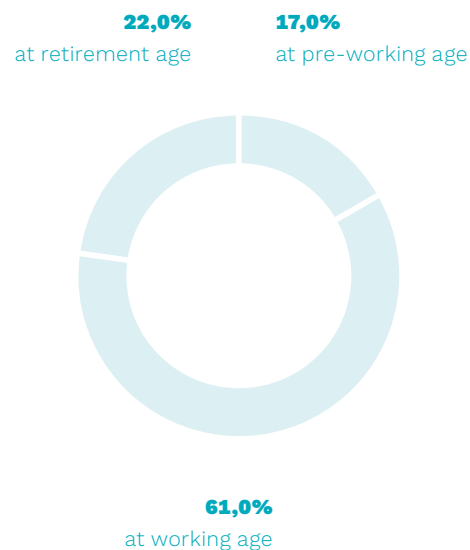
Professionals for the world of business are also educated by the University of Banking, a non-public university with economic profile, where classes are conducted by renowned specialists and excellent practitioners. The University has a wide range of business partners, including the largest companies from the region. This cooperation includes counselling and consultations on the creation of study programmes, conducting classes, as well as indicating the subject of diploma theses related to the scope of activities of a given company.

There are two more private universities in the city: The Higher School of Social and Media Culture, offering, among others, the following faculties: journalism and social communication, political science, computer science, and the Jagiellonian College—the Higher School in Toruń, offering the following faculties: administration, national security, pedagogy and international relations.

However, in order to meet the needs of investors from various industries, professionals with secondary education are also needed. This year, 2,336 primary and junior high school graduates can be educated in six vocational schools and eight technical schools in Toruń.

Young people who choose vocational training can gain one of the 43 professions. Tinsmith, confectioner, hairdresser or mechatronics technician are just some of the professions that have been included in the rich educational offer of Toruń's vocational schools and technical schools for 2019/2020.

## POPULATION



## HOW IS LIFE IN TORUŃ? GOOD!

The best recommendation for each city is its inhabitants. Educated, active and using modern communication tools, the citizens of Toruń like their city and feel happy in it. They appreciate the fact that Toruń is a beautiful place on the map of Poland, but also a perfect place for scientific and professional development. Connections with the motorway, convenient communication between the right and left bank of the city, as well as the metropolitan communication system have a positive impact on the mobility and quality of life of the residents.

They cannot complain about the availability of services or retail outlets either. With a retail area exceeding 150,000 sqm and a saturation of 656 sqm per thousand inhabitants, Toruń ranks 12th among Polish cities.

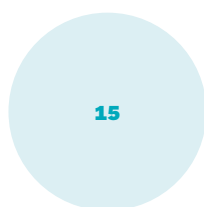
The city also focuses strongly on pro-ecological activities. Cyclists have 40 stations and 400 city bikes at their disposal. In this field Toruń is one of the leaders in the country. The city has created 108 km of various cycling paths and lanes, as well as walking and cycling routes for cyclists. You can leave your bicycle on one of the more than 5 thousand parking spaces scattered all over the city.

This year, 150 electric scooters and 50 mopeds have also appeared in the city. An interesting fact may be that scooters cannot be parked in the historic Old Town of Toruń. The city authorities, who care about maintaining order in the very centre, which is listed on the UNESCO World Heritage List, have concluded such an agreement with the operator.

Sports fans in Toruń will also find something for themselves. It is a city known primarily for its love of speedway. Top class entertainment is provided by teams belonging to the strict national lead, including the local KS Toruń.

**It is a city that excels at combining tradition with innovation. That's why it hasn't been associated with gingerbread and Nicolaus Copernicus for a long time now.**

### CULTURE



Public libraries  
(with branches)



Art galleries and  
boutiques



Permanent  
cinemas



Museums  
(with branches)



Theatres



Every year the Speedway Grand Prix finals are held on the Motoarena built 10 years ago. Moreover, the city provides a rich cultural offer. Hundreds of events take place here every year, the biggest being the Bella Skyway Festival of Light, the Tofifest International Film Festival and the Contact International Theatre Festival. In the coming years, the establishment of the European Film Centre Camerimage in Toruń is planned. The investment will cost about PLN 600 million and will be completed by 2025. The state budget will allocate PLN 400 million for the construction of the Centre, and the remaining PLN 200 million will be allocated to the city of Toruń.

The local authorities also devote huge funds to renovations under the Toruń Revitalisation Programme, which made it possible to carry out conservation works of an unprecedented scope in the history of the city.

They covered the most beautiful and valuable objects in Toruń. Among other things, the town hall and the ruins of the Teutonic castle gained new glory. Thanks to EU funds, the Baj Pomorski Theatre has been renovated, the Centre for Contemporary Art and the Centre for Modernity "The Mill of Knowledge" have been established, and the latter one is currently being expanded to include other exhibition areas. In 2015, the Jordanki Cultural and Congress Centre, a facility of European scale, was opened to host concerts of world-class stars. The modern architecture of the building based on the concept of the Spanish Menis Arquitectos studio has brought Toruń fame and many awards in prestigious architectural competitions.

## EMERGING OFFICE MARKET

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Toruń is undoubtedly one of the biggest tourist attractions in Poland. The city is visited by nearly 2.5 million tourists a year, who generate a significant part of the income earned by Toruń's business. However, this is not the only way the citizens of Toruń make money, nor is it the only business branch driving the development of the city.

In the report "Modern Business Services Sector in Poland" prepared by the Association of Business Service Leaders (ABSL), Toruń is mentioned as one of the best developing locations in terms of office space in the country. The total supply of office space in Toruń in the first quarter of 2019 amounted to 57,400 sqm. The total supply of office space in Toruń in the first quarter of 2019 amounted to 57,400 sqm. Most of the office space was allocated to single offices and small office complexes, but recently modern offices for service centres have also started to appear in the city.

A class space costs from 11 to 15.5 EUR/sqm per month, whilst in the lowest standard office buildings prices range from 6 to 10 EUR/sqm per month.

**The city offers a wide range of office space; mostly single offices and smaller complexes, but there are also high-standard large spaces available for service centres.**

The hotel offer is important for the development of business, and it is improving year by year. There are 25 categorized hotels in the city, offering a total of nearly 2,000 rooms, including six 4-star hotels, ten 3-star hotels, eight 2 stars hotels and one 1-star hotel. In the coming years there are plans to build more hotels, including Hilton Garden Inn Toruń Old Town, which will be erected in the very heart of Toruń's Old Town, thanks to the adaptation of the old brewery and adjacent tenement houses.

Since Toruń's location is great for logistic projects, a modern distribution centre is being built near the A1 motorway. In July this year, just 10 km from the city centre, right next to the Lubicz junction, the construction of Panattoni Park Toruń II, with an area of over 57.5 thousand sqm, started. The Toruń distribution centre will be put into use as early as in the first quarter of 2020 and will become an extremely important logistic hub for Kujawy and Pomerania.

Panattoni Park Toruń II is yet another investment of the developer in the Kujawsko-Pomorskie region. So far, the company has developed its own BTS Nestle Papowo park and two BTS facilities (for Carrefour and Kaufland) with a total area of 61,000 sqm.

According to Dorota Jagodzińska, Managing Director of Panattoni Europe, Toruń is a market that has been underestimated by the warehouse industry. However, the city of over 200,000 inhabitants, of which over 130,000 are at working age, located at the junction of the A1 motorway and the S10 expressway, is slowly becoming one of the most important places on the logistic map of Poland.

It is worth noting that Toruń still has over 75 hectares of land designated for production or warehouse construction.

## SPACE INDUSTRY ONLY IN TORUŃ

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The fact that Toruń is a perfect place for business is confirmed by independent rankings, in which the city occupies top positions. The list of 500 largest Polish companies prepared by "Rzeczpospolita" also proves it. Seven of them come from Toruń, and one has its registered office in Łysomice near Toruń (Neuca, Krajowa Spółka Cukrowa, Grupa TZMO, ThyssenKrupp Materials, Nova Trading, Apator, Cereal Partners Poland Toruń-Pacific, UMC Poland).

It is a city that is simply friendly to business, not only the big one. According to a report prepared by the World Bank, which covered 18 largest Polish cities, Toruń ranked fourth in terms of the conditions created for entrepreneurs by local authorities. Four criteria were taken into account in the assessment: number of days needed to establish a company, time needed to obtain a building permit, waiting time for entry in the land and mortgage register and number of days needed to collect receivables.

**Start-ups, IT and space industries, coworking zones—the words that define entrepreneurship today. And Toruń supports young people to develop their talents here.**

The city also offers development opportunities to fledging companies and start-ups, often created by students. For their benefit and needs, the Nicolaus Copernicus University has created the Interdisciplinary Centre for Modern Technologies—a place where interdisciplinary scientific research is conducted. Professor Jerzy P. Łukaszewicz, Director of ICNT, believes that this is a good way to prepare qualified research staff. However, the main goal of the project is the transfer of scientific discoveries to companies, so that they can be applied in practice. The construction and equipment of the facility cost over 70 million PLN. The purchase of modern equipment used in the facility alone cost PLN 40 million.

Many business environment institutions work for the benefit of Toruń entrepreneurs: the Toruń Technology Park, the Subzone of the Pomeranian Special Economic Zone in the city and close proximity to the subzone in Łysomice as well as numerous business incubators.

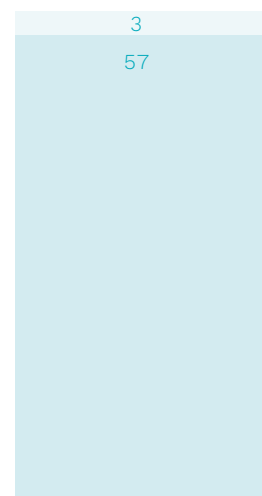
A few years ago, a new technology incubator was created for their needs: Exea Smart Space, a thousand square meters of modern office space where IT start-ups are located.

It is impossible not to notice that in recent years Toruń's companies from the broadly understood space industry have been growing dynamically. It is here that, for instance, the Golden Fleece technology is developed, related to an innovative space propulsion system based on the impact of solar wind on the sail. It is being developed by specialists from ABM Space. The potential of the Toruń space sector is also focused on space robotics and robotic astronomical observatories, satellite tracking and solutions for human astronautics.

ABM Space conducted its activity in Toruń Business Link, one of thirteen facilities of this type operating in the country. Although the smallest in the group, it takes the second place, just behind Warsaw, in terms of the number of start-ups developed in it. It is a place of development for even 200 start-up companies. Toruń's entrepreneurship is confirmed by statistics on start-ups and growing budget revenues from PIT and CIT taxes. There are 3,100 commercial law companies operating in Toruń today, including 260 with foreign capital participation, and 13,800 sole traders and civil partnerships. In 2018 alone, 2,358 new companies started their business activity. The city budget for 2019 assumes an increase in income from PIT and CIT taxes by 15.5 million PLN to 329.9 million PLN in comparison to 2018.

## MODERN OFFICE SPACE

1Q 2019



2019

- Usable area (in thousands of m²)
- Usable area under construction (in thousands of m²)

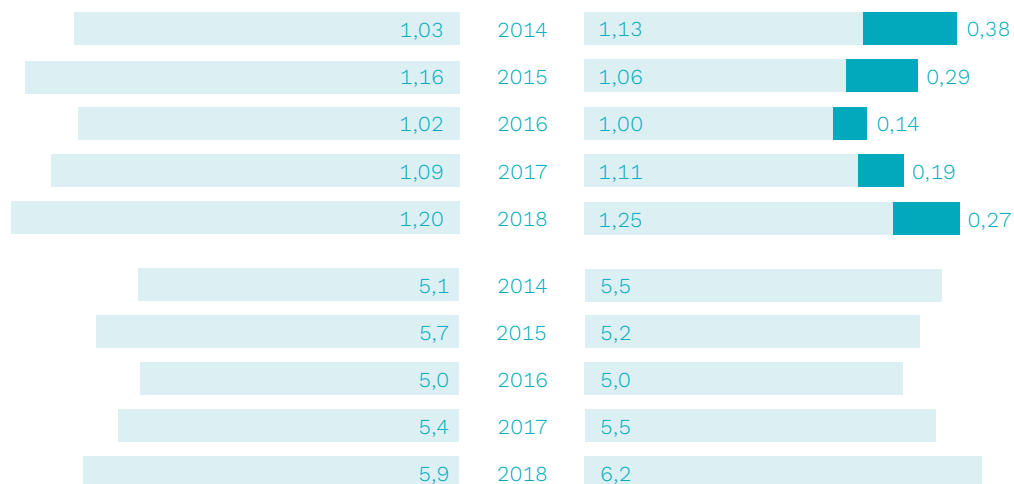
Źródło: JLL

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues

(in thousands PLN per inhabitant)

Expenditure

(in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

2018

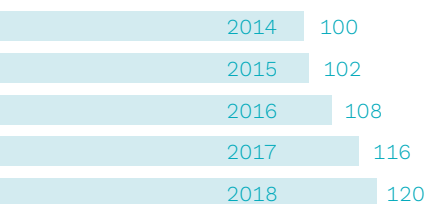
**6** universities  
**26,972** students

2019

**6** universities  
**22,005** students

## BIKE ROUTES

(km)



## ELECTRIC CARS

2018

**7**  
charging station

## HOUSING RESOURCES

2017

1214

60 flats per  
10,000 people

2018

990

49 flats per  
10,000 peopleCompleted  
flats

30%

of the city is covered  
by green areas

## HOTELS

1  
★8  
★★10  
★★★6  
★★★

23

hotels with  
conference facilities

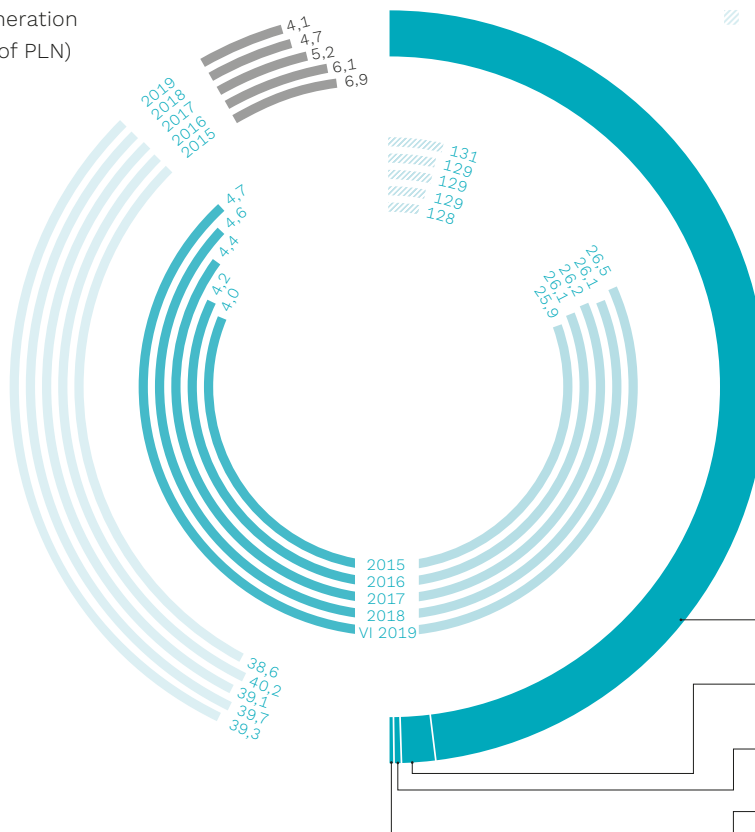
- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)

## COMPANIES IN THE CITY

- Enterprises operating in the city (in thousands)
- ▨ Enterprises operating in the city per 1,000 inhabitants

2,358  
new companies were  
registered last year

26,138  
total number  
of economic entities



## COMPANIES ACCORDING TO EMPLOYMENT

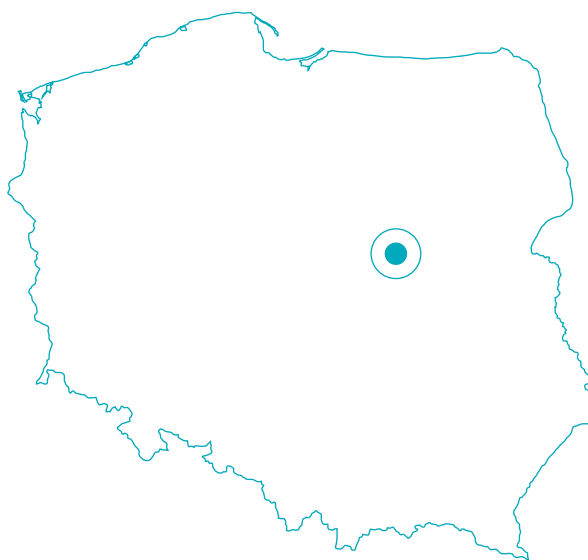
- 96.7% of micro companies (up to 9 employees)
- 2.7% of small companies (10–49 employees)
- 0.5% of medium-sized companies (50–249 employees)
- 0.1% of large companies (over 249 employees)

Sources: Central Statistical Office (GUS),  
survey conducted in the city, own sources









# WARSAW

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Voivodeship	Mazowieckie
Mayor	Rafał Trzaskowski
Area	517 sqm
Population density	3,412 people per sqm
Population	1,777,972
Granting urban rights	1323
Aspiration	Berlin, London, Vienna

## KONTAKT

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+48 22 443 07 56, +48 22 443 22 20

# GLOBAL METROPOLIS

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**RAFAŁ TRZASKOWSKI, MAYOR OF WARSAW**

Open and friendly Warsaw is an excellent place for innovations in the world of science and business. Investors, ambitious students and specialists who want to be part of the city due to the availability of capital, its attractive location, architecture and high quality of life. It is the creative people who develop our economy. We offer them a wide range of office, warehouse and retail properties. Warsaw is a leader in the region, well connected with the rest of Europe, full of ideas and opportunities.

**ADAM KICIŃSKI, CEO CD PROJEKT**

Warsaw is a city that has been consistently investing in the development and improvement of the standards of local community and business for years. The combination of direct cooperation with the best universities in Poland, access to outstanding specialists and supportive approach of the city make Warsaw a true centre of new technologies, and at the same time a leader in this part of Europe, both in the economic and cultural sphere.



**SŁAWOMIR S. SIKORA, CITIGROUP COUNTRY OFFICER AND CEO OF CITI HANDLOWY**

Warsaw has extraordinary assets: a fantastic central location in Europe, from where it is similarly close to London, Milan or Moscow. For companies investing in the city it is also important that they can employ very well educated graduates of many local universities. It is a city of start-ups, new technologies and modern office space as well as a city of culture and great infrastructure.



**ADAM ROŚ, VICE PRESIDENT OF THE RESEARCH AND DEVELOPMENT CENTER SAMSUNG**

Warsaw is an incredible place to invest and open offices because of its unique character. Foreign investors will find here a fantastically educated, experienced and talented staff from various fields. There are great schools in Warsaw, the city is quite well communicated and offices can be found in almost any quarter. Warsaw is a constantly changing, open city of people with passion.



“Warsaw is an exciting, global city and one of the most attractive markets for investors in Europe. From our perspective, the development of the capital is driven, above all, by the impressive increase in the purchasing power of its inhabitants. As an investor planning our activities in the long term, we see the advantages of this market,” says Hadley Dean, President of EPP, the portfolio of which covers, among others, the recently opened shopping mall Galeria Młociny and the multifunctional project Towarowa 22, which is under construction.

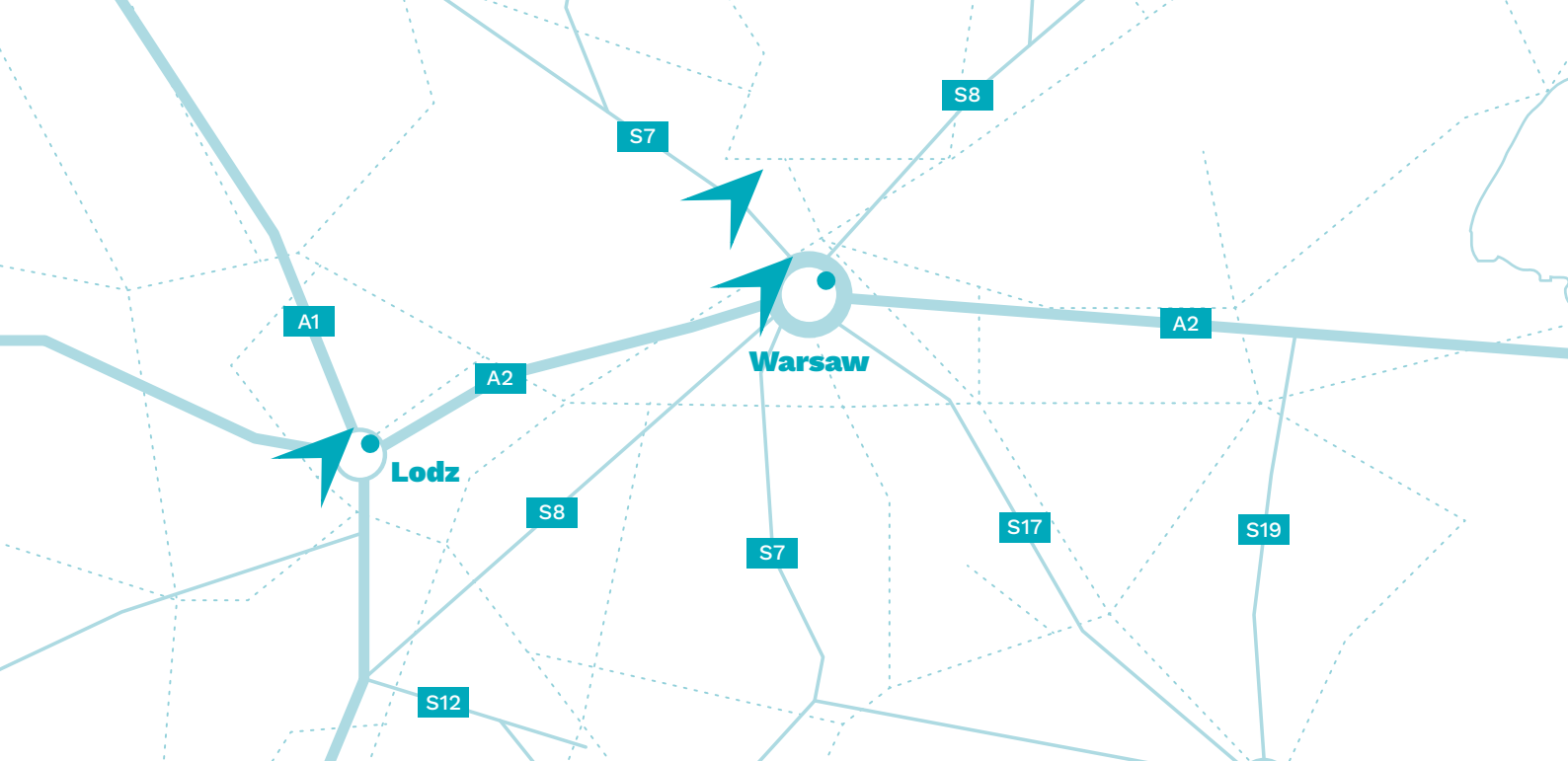
The investor stresses that the investment attractiveness of Warsaw is confirmed by, among others, strong macroeconomic foundations and favourable forecasts for the city. And as one of the symbols of Warsaw’s transformation into a global metropolis he points out the dynamically transforming Wola quarter. Formerly industrial and neglected, in recent years it has become one of the most desirable regions for locating investments. It is there that modern skyscrapers such as Warsaw Spire have grown in recent years, and new ones, the best example of which is Mennica Legacy Tower or The Warsaw Hub, are under construction.

The city cares about the quality of life of its inhabitants; it’s constantly improving the quality of communication and enriching its cultural offer. But there’s no denying that Warsaw—above all—is supposed to be a magnet for business. And what does business need above all else? Educated employees and offices. “In recent years Warsaw has doubled the size of office space, we have twice as much office space as Budapest or Prague,” says Michał Olszewski, Deputy Mayor of Warsaw, adding that the strength of the capital’s office market is not only supply, but also high quality.

We are talking about buildings that have been built mostly over the last few or several years and meet the A-class standards. This is one of the main factors—apart from well-educated and ready to work graduates and promising economic forecasts—which attract money and business to Warsaw. According to the City Hall, there are nearly 24 thousand companies with foreign capital in Warsaw, i.e. about 36 percent of all the companies with foreign capital in Poland. “Companies deciding where to locate their headquarters are most likely to choose strong, local markets. For this reason, most large corporations have their headquarters in Warsaw. From a city that has always been the second choice after Prague or Budapest, we have become a leader in the region for investors,” says Michał Olszewski.

You don’t have to look far to find examples. In Warsaw you can find JP Morgan, Accenture, Goldman Sachs, Google, Procter & Gamble, Samsung and Facebook. But the biggest Polish companies are also flourishing here, such as for instance CD Projekt RED, which, like Warsaw itself, is already a truly global brand.

**According to Eurostat data, the capital city is already one of the richest regions in the European Union. In 2017, the gross domestic product per capita in Warsaw reached 152 percent of the EU average.**



382 km

**hard surface public  
roads per 100 km<sup>2</sup>**

- motorways  
and expressways
- railways
- airport
- railway station

## IN CONNECTION WITH THE WORLD

Warsaw is the best connected Polish city. Two airports—Chopin Airport located within the capital city and Warsaw-Modlin Airport about 30 km from the city centre—provide connections with 51 countries and the most important transfer centers of the world. And the Central Transport Port, which is to be a regional transfer hub, is to be built relatively close to Warsaw (approx. 40 km).

In Warsaw we can also find the intersection of the most important European road routes, including the E30/ A2 motorway (the route running from Ireland to Russia), E77 (from Russia to Hungary) and Via Baltica (from the Czech Republic to Finland). Not to forget the S7, S8 and S17 expressways, which provide convenient access to most of the large urban centers in Poland. The same applies to the railway routes that run through the Central Warsaw railway station in the middle of the capital city. Not only domestic trains but also those from Prague, Berlin, Vienna or Budapest come to Warsaw. There is also a freight connection with the Chinese Suzhou.

## KNOW HOW FOR ENTREPRENEURIAL PEOPLE

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“The most important goals for Warsaw are supporting the development of entrepreneurship and acquiring new projects. That is why we try to support investors at every stage—from inviting them to a meeting with a presentation of the city’s potential, through connecting them with local partners, to post-investment service,” says Grzegorz Wolff, Deputy Director of the Economic Development Bureau. The office operates within the structure of the City Hall and is the first contact for investors. Each of them can count on comprehensive information on modern business services in the city, as well as know-how on moving around the capital and its institutions.

The BRG also acts as a link between investors and potential partners, such as HR agencies, universities and NGOs. “We know who to turn to and what questions to ask. As an institution of public trust, which cares about attracting investors, we are taken seriously by partners and therefore, acting as a kind of matchmaker, we have high effectiveness,” says Wolff.

The role of the Economic Development Bureau is not limited to introducing the investor to the secrets of the business environment of the city, but it is also about providing services after the investment is completed. There is also a possibility of exemption from property tax on condition that at least 500 new jobs are created. The relief lasts for 12 months—to take advantage of it for a longer period of time, you need to create another minimum 500, and maximum 1,000 jobs; in the third year the threshold rises to 1,500. The investor can also count on the support of the Labour Office, which can search for suitable employees not only among the registered unemployed, but all those who apply to the office.

Start-ups also play an important role for the city, and cooperation with the broadly understood creative industry is an important point of the City Hall’s strategy. There is a good reason why Warsaw has already spent PLN 640 million on investments in the local start-up eco-system.

The first Warsaw incubator of the Smolna Entrepreneurship Centre (CPS) has been operating for six years and is part of the “Innovative Warsaw 2020” programme. If the company meets certain requirements, it can apply for a place to work in the incubator at preferential rates, but perhaps an even more important function of CPS is to provide specialist legal, accounting and financial consulting, as well as workshops and networking meetings for entrepreneurs. In the immediate vicinity of the city there are two subzones of special economic zones. Investors can therefore benefit from exemptions from CIT/PIT, R&D allowances or grants for innovative projects.

**Warsaw cares not only about providing assistance and incentives for the largest players on the local and international market, but also has an offer for innovative companies.**

## MELTING POT OF EXPERTS

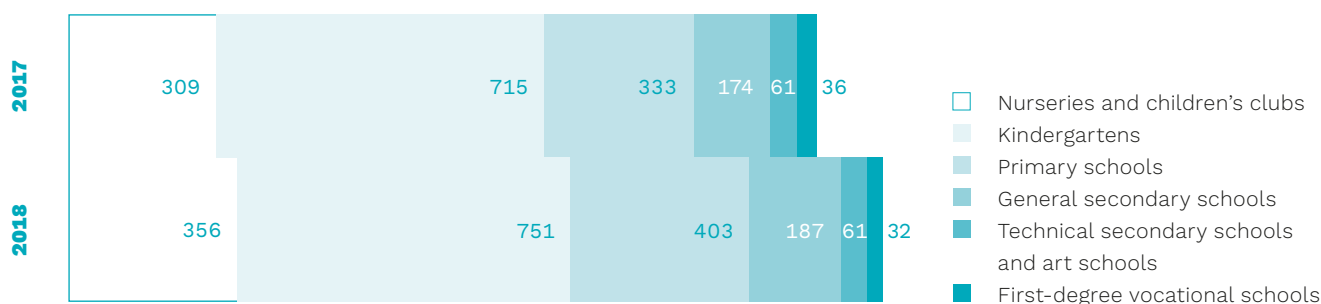
Officially in Warsaw in May 2019, there were about 38 thousand foreigners with permanent and temporary residence permits—according to the Data provided by the City Hall. As compared to September 2018, it means an increase of 24 per cent, which clearly shows that Warsaw is more and more willingly chosen by foreigners as the destination of migration. We do not know how many foreigners there are in fact in Warsaw. The above are official data that do not reflect the actual number of foreigners staying in the Polish capital. The largest group of officially registered immigrants are Ukrainians—there are almost 14 thousand of them living in Warsaw. The second place belongs to Belarusians and Vietnamese (about 3,000 people representing each nation).

This is an extremely important group for the Warsaw market. With unemployment amounting to 1.5 per cent, every person ready to work counts. The gap is filled, among others, by Ukrainians who find employment in service points, trade, transport or construction, but also in large international companies, which have their branches and headquarters in Warsaw. Citi is an example of such an employer. The Warsaw shared services centre (CSC Poland) employs over 4000 people and every tenth person is a foreigner. Not only from the East—in the CSC building you can hear 30 different foreign languages.

Companies choose Warsaw largely because of its well-educated staff. The capital city is a real factory of graduates—between 2016 and 2017 over 53 thousand students left university walls with a diploma. There are 216 thousand students in Warsaw, attending a total of 68 universities. “Not everyone knows that Warsaw is the largest academic market in Central and Eastern Europe. Our universities produce graduates with high qualifications and thanks to that

**Warsaw is one of the largest cities in Central and Eastern Europe. The administrative borders are inhabited by 1.7 million people, and the whole agglomeration by over 3 million, including more and more foreigners.**

### EDUCATION





we can compete with highly qualified staff. Today, graduates don't have a problem to find a job in Warsaw. This makes us a stable labour market," emphasizes the Deputy Mayor of Warsaw Michał Olszewski. According to the EF English Proficiency Index, in the capital city one can find the largest number of people in Poland whose level of English proficiency is described as very high. The capital city scored 64.4 points in this ranking. The first place in the world belongs to Stockholm, which has 71 points.

In the QS EECA University Rankings 2018, the University of Warsaw (the largest university in Poland) ranked 6<sup>th</sup> among the 200 best universities in Emerging Europe and Central Asia. It is also at the top of the Ranking of Higher Education Institutions prepared by Perspektywy 2018, which classifies the best higher education institutions in Poland. The third place among public universities belongs to the Warsaw University of Technology, and Kozminski University of Technology is ranked the highest in the group of non-public universities in Poland.

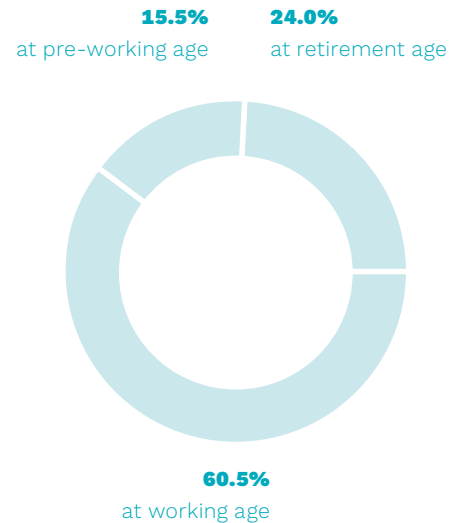
Warsaw universities support entrepreneurship and closely cooperate with business. An example is the Warsaw University Incubator, launched in 2017 which provides students, doctoral students and university employees with expert assistance, individual team mentoring, training courses and workshops, as well as space to work. UW is also involved in the Santander Universidades programme, under the framework of which companies support the organisation of scholarship programmes, the implementation of scientific projects and initiatives to commercialise research results, and promote entrepreneurship among students.

But it's not just the students that companies are interested in. The search for talents starts already in Warsaw high schools and technical schools. As part of the project of the organization Exempted from Theory and the Association of Business Service Leaders (ABSL), with the support of JPMorgan Chase Foundation, a program is organized for students of 40 schools from Mazovia, under the framework of which they will gain soft skills and will be able to perform 150 jobs in companies associated in ABSL.

"Project participants will receive advice and support in choosing the most suitable position for them. They will also be invited to a job fair organized in Warsaw, during which they will be able to meet and talk to representatives of the largest employers in the sector," says Marcelina Godlewska, managing director of ABSL.

## POPULATION

2018



## A COMPLETE LIFE

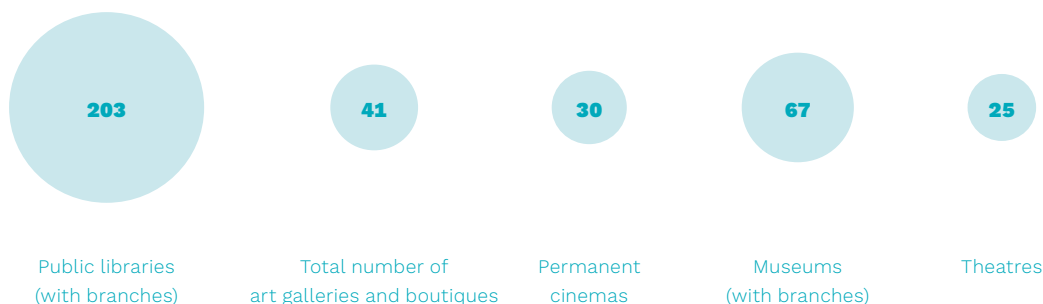
30<sup>th</sup> place in the world, behind Seoul and before New York. This is the result of Warsaw in the latest Deutsche Bank ranking of the best cities to live in. According to this ranking, the capital city is the leader in this field in Poland. While talking about the factors that distinguish the capital city from other Polish cities in terms of quality of life, it is impossible not to mention public transport. The city is the national leader in financing public transport, which allocates the largest percentage of its budget to it in comparison with other large Polish cities. However, it is difficult to find a better investment in Warsaw in 2018, when the underground line alone has been used by about 234 million passengers, which gives over 640 thousand people a day.

However, you don't have to take the underground, you can take a bike instead. The public urban bike system is another aspect affecting the quality of life in the city, which is strongly emphasized by the town hall. The Veturilo system is one of the most developed in Europe: it has 368 bicycle stations and about 5,300 bicycles for rent. You can ride along the constantly growing number of bicycle paths—today there are over 500 km of them, and the plan is to build more along the banks of the Vistula River. The capital city is also putting great emphasis on the development of car-sharing, with one of the largest in Europe systems of electric car rental for minutes run by Innogy, and rental of city electric scooters, which there are already a few thousand of in Warsaw.

But Warsaw is not only the administrative capital of Poland, it is also the cultural one. Organization of the largest sports events in the country is facilitated by the availability of such venues as the Torwar sports and entertainment hall or the PGE National Stadium. These venues have already hosted, among others, Elton John, Ed Sheeran, Rammstein, Beyonce and Rihanna. In more intimate conditions, you

**Perfectly connected, green, modern, full of events and cultural events, and at the same time constantly changing—this is how Warsaw is briefly described as a place to live.**

## CULTURE



can watch burlesque shows, improvised theatre, listen to stories from expeditions around the world in one of the traveling cafes or take part in the “Concert under the stars” in the planetarium of the Copernicus Science Centre. At the same time, Warsaw is a very green city. Parks and green areas cover over 20 per cent of the city’s area. Warsaw is proud of its Vistula boulevards, which are gradually transformed into a summer salon of the capital. The Vistula River itself is one of the European wonders—few cities on our continent can boast of a river with a wild bank in the very centre.

Warsaw’s commercial offer is second to none in Poland. It is here that most of the shopping malls and boutiques are located. This encourages investors to seek new ways of attracting customers. “We are moving away from the commercial giants and focusing more and more on individual projects, integrated into our surroundings, with an extensive gastronomic component. Young people expect access to many functionalities at the same time—to trade, restaurants with exotic cuisine and top class culture. This results in a rapid scale of transformations and revitalisation of degraded areas, where modern multifunctional facilities are being built,” says Hadley Dean from EPP. Such as, for example, Koneser in Warsaw’s Praga quarter, Powiśle Power Plant or the planned Towarowa 22. They have been designed in such a way as to make it possible to live, work and have enjoy life.”

Other modern accents in Warsaw are smart city solutions. According to the City Hall, in 2019 Warsaw will provide a self-service e-services platform, thanks to which residents, entrepreneurs and tourists will be able to handle many matters without a visit at the office. Support for local taxes, garbage collection, building permits or payment for services will be available after logging in to My 19115 system. The platform will be successively connected to further digital services of the city, with time also offered by external suppliers.

And guests, apart from the excellent cultural facilities and beautifully restored Old Town, are tempted by the rich offer of hotels and apartments for rent. The Booking base consists of approx. 3,000 places, where you can stay overnight and Airbnb offers over 5,000 apartments for short-term rental in Warsaw. In contrast to towns located at the seaside or in the mountains, the season lasts all year round.

## HEALTHCARE\*

2017 | per 10,000 inhabitants

48 27

**beds**

**doctors**

\* data regarding  
Mazowieckie voivodship

## SKYSCRAPERS AND FLEXIBLE SURFACES

The office market in Warsaw has made a huge progress in recent years, both in terms of the amount of office space offered and its quality. According to JLL estimates, last year over EUR 2 billion was invested here, which is one of the reasons why the Polish capital has been recognized by the company as one of the best places in the world for locating foreign projects. Experts are of the opinion that the demand for offices in Warsaw will be growing, and in the future we can expect a steady interest of investors, and thus—more office buildings changing the panorama of the city.

Today, the capital city provides approx. 5.5 million sqm of modern office space—this is more than the all the resources of other large Polish cities, and another 800 thousand sqm is under construction. Most of the available office space is A-class. After a very good year 2017, the Warsaw office market maintained a high pace of development also in 2018. The result is a steadily growing interest of tenants and developers and a falling vacancy rate in the capital city, currently at the level of 11%. The downward trend of this ratio should continue at least until the end of 2019.

New office buildings are changing the face of Warsaw. Glass buildings, in which large corporations, among others, have their headquarters, can be found not only Służewiec in Warsaw. The second business centre of the city became Wola, or more precisely the area around the Daszyńskiego roundabout. In 2017 Citi Service Center rented nearly 19 thousand sqm in one of the buildings in this area, (setting a record that has not been broken until now on the Warsaw office market), located in the immediate vicinity of Warsaw Spire (60,000 sqm of usable space) or The Warsaw Hub (113,000 sqm) and Generation Park (80,000 sqm). Other noteworthy new office investments in Warsaw include Central Point at the junction of I and II metro lines or Varso Central Station, which will become the tallest building in the EU, measuring 310 metres.

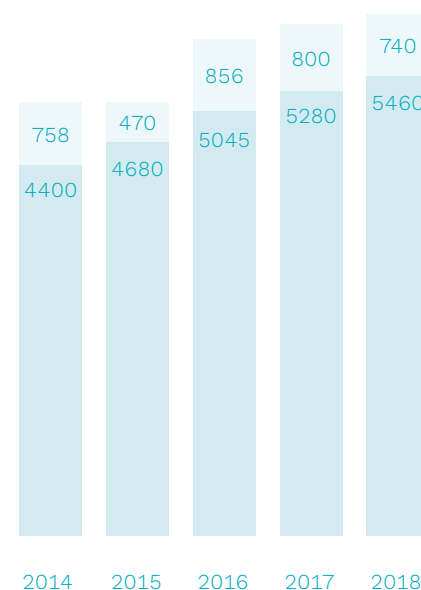
Not only the biggest tenants will find a place for themselves in the Warsaw office space. It is also home to small businesses, start-ups and freelancers, largely thanks to the dynamic development of coworking offices. Over 77,000 sqm of space has already been allotted for flexible lease, and by the end of 2020 the available space will increase to 151,000 sqm. “We expect that four out of five investment transactions on the office market of the Warsaw COB will concern buildings in which coworking operators operate,” says Soren Rodian Olsen, partner in Cushman & Wakefield. The development of the flexible office space sector is driven by, among others, WeWork, the largest coworking operator in the world. The company has recently opened its first location in Warsaw and is planning to expand further.

**The number of offices in the capital is growing exponentially. And coworking offices are the future of the local market.**

**Area covered by the zoning plan**

37.9%

### MODERN OFFICE SPACE



■ Area covered by the zoning plan (in thousands of m²)  
■ Usable area under construction (in thousands of m²)

## AN OPEN CITY

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Warsaw as the main economic centre of Poland is valued for its openness—it is the third city in Europe (after London and Dublin) in the category of business-friendliness according to the ranking “European cities and regions of the future 2018/19”. Capital is welcomed here with open arms regardless of the country of origin, and tolerance for cultural diversity is a driving force for innovation and creativity in itself.

Multiculturalism itself can be a source of ideas. Multilesson is a Warsaw start-up valued at PLN 4 million, which used the idea behind Multisport cards and which adapted it to the needs of language learning. Just as sports cards allow unlimited access to some gyms and other facilities, Multilesson subscription allows almost unlimited language learning with professional teachers, live or via Skype. The service is addressed primarily to companies, as they are supposed to offer their employees language learning packages as a perk. “We are not reinventing the wheel here. People learn and will always learn languages. And the fact that Warsaw is a multicultural place only reinforces such a need. A Spaniard, an Indian and a Ukrainian can meet here in one place of work. And they want to talk,” says Łukasz Skrzypek, one of the founders of Multilesson.

Innovation is fostered not only by openness and multicultural environment, but also by acceleration programmes for new enterprises. In #Warsaw\_booster in 2018, 40 teams representing insurance and financial technologies—insurtech and fintech—took part. 30 mentors and representatives of 12 business partners provided the participants with 600 hours of mentoring and business consulting. Other acceleration programs, such as Be Creative in Warsaw or Startup Hub Warsaw, helped new entrepreneurs from such industries as computer games, design, fashion and the Internet of Things.

The Warsaw start-up ecosystem has several flagship locations, including Google Campus Warsaw, the Smolna Entrepreneurship Centre, the Fair's Creative Centre and the emerging New Prague Creative Centre. Each of them is to provide space for innovators, craftsmen and artists. And if someone feels like a start-up and wants to meet similar people, they will not be bored in Warsaw. In 2018 alone, 138 environmental events took place in the city, and initiatives such as Carrots Meetup, OpenReaktor or Startup Wednesday are excellent opportunities to meet teams open to new members, verify their ideas with other entrepreneurs, and even meet an investor or a business angel.

The environment of innovative businesses is also supported by universities. The Centre for Entrepreneurship and Technology Transfer at the Warsaw School of Economics runs the Entrepreneurs' Club, fostering contacts between science and business. The Innovation Incubator of the Warsaw University of Technology offers infrastructural and content-related facilities for the academic community and start-ups. The University of Warsaw Incubator operates on a similar basis. And coworking offices are the future of the local market.

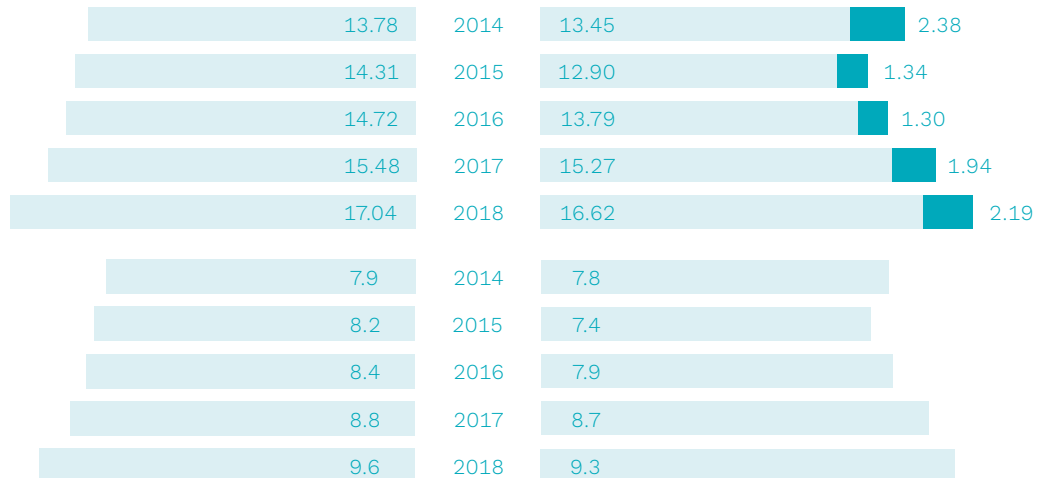
**The capital city is referred to as “the start-up city” for a good reason. The ecosystem for innovation is particularly favourable here.**

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues (in thousands PLN per inhabitant)

Expenditure (in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

2017

2018

**70** **230,268**  
universities students

**68** **216,600**  
universities students

## BIKE ROUTES

(km)



## ELECTRIC CARS

2018

**30**  
charging station



**HOUSING RESOURCES**

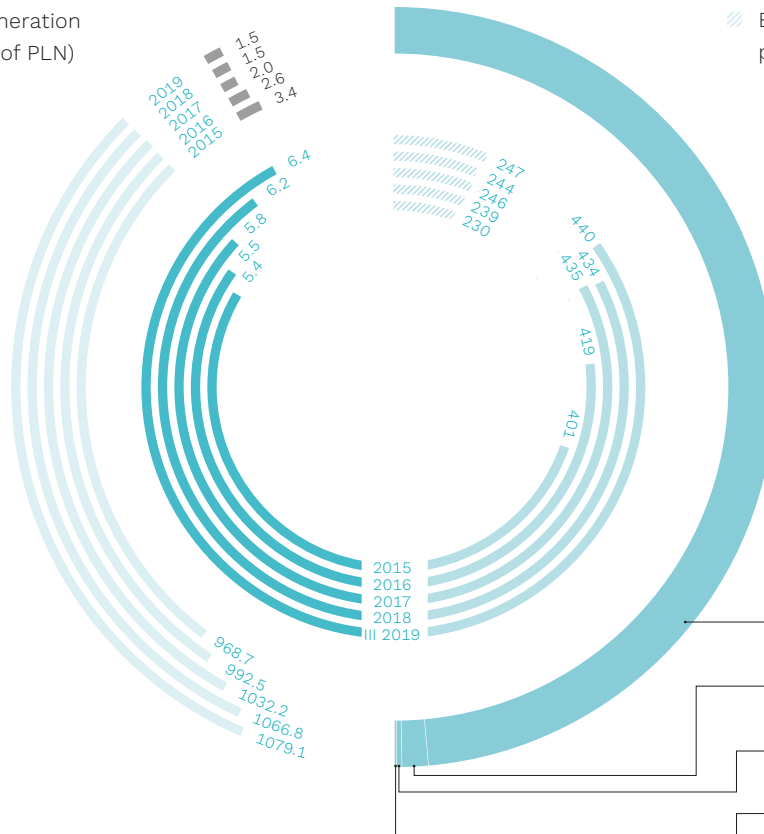
2017

**20,346**115 flats per  
10,000 people

2018

**23,498**132 flats per  
10,000 people**Completed  
flats****40%****of the city is covered  
by green areas****HOTELS****97****hotels with  
conference facilities**

- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)

**COMPANIES IN THE CITY**

- Enterprises operating in the city (in thousands)
- ▨ Enterprises operating in the city per 1,000 inhabitants

**37,348****new companies were  
registered last year****22.9%****of all the companies  
registered are  
foreign companies****COMPANIES  
ACCORDING  
TO EMPLOYMENT**

- 96.3%** of micro companies (up to 9 employees)
- 2.9%** of small companies (10–49 employees)
- 0.6%** of medium-sized companies (50–249 employees)
- 0.2%** of large companies (over 249 employees)

Sources: Central Statistical Office (GUS),  
survey conducted in the city, own sources







# WROCLAW

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Voivodeship	Dolnośląskie
Mayor	Jacek Sutryk
Area	293 sqm
Population density	2,188 people per sqm
Population	640,648
Granting urban rights	1214
Mirror reflection	Dresden
Aspirations	Munich, Berlin

## CONTACT DETAILS

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Business Support Centre  
araw@araw.pl  
+48 71 783 53 10



# A VIBRANT ECONOMY

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## **JACEK SUTRYK, MAYOR OF WROCLAW**

Wrocław's magnet for investment is its excellent location and accessibility, diversified economy, good infrastructure, high quality of life of its inhabitants and wide access to talented employees. It concerns both the talents already present on the labour market as well as those who will find themselves there after leaving Wrocław's universities, known for providing high quality education. Over 100,000 students studying in Wrocław are the city's incredible intellectual capital.

## **KRZYSZTOF DOMARECKI, CEO OF SELENA FM**

I have been watching this city over the years of Selena's development and I can see how its potential, technological thought and business professionalism are growing. Wrocław is characterized by very good cooperation with local institutions and administration that support entrepreneurs, its developing infrastructure and very good universities, all of which make it a perfect incubator of entrepreneurship on the investment map of Poland.



## **PAWEŁ ROHLEDER, CHIEF TECHNOLOGY OFFICER TECHLAND**

The advantage of Wrocław is a large number of universities, especially technical ones, which produce many young and talented graduates who enter the labour market. In recent years, investors and representatives of companies from all over the world have been dynamically operating in the region, making Wrocław a hub for technology companies. Moreover, Wrocław is an open, European city, which attracts young, unconventionally thinking people with its positive atmosphere.

## **BARTOSZ CIEPLUCH, DIRECTOR OF THE WROCLAW R&D NOKIA CENTER**

Wrocław is, above all, a perfect place to live. The city has a lot to offer practically to every age group, and especially to young people. The city authorities are focused on constant development of the agglomeration, which has a direct impact on the improvement of living conditions of Wrocław's residents. Wrocław is one of the largest academic cities in Poland, which, for corporations, is synonymous with easy access to well qualified personnel.



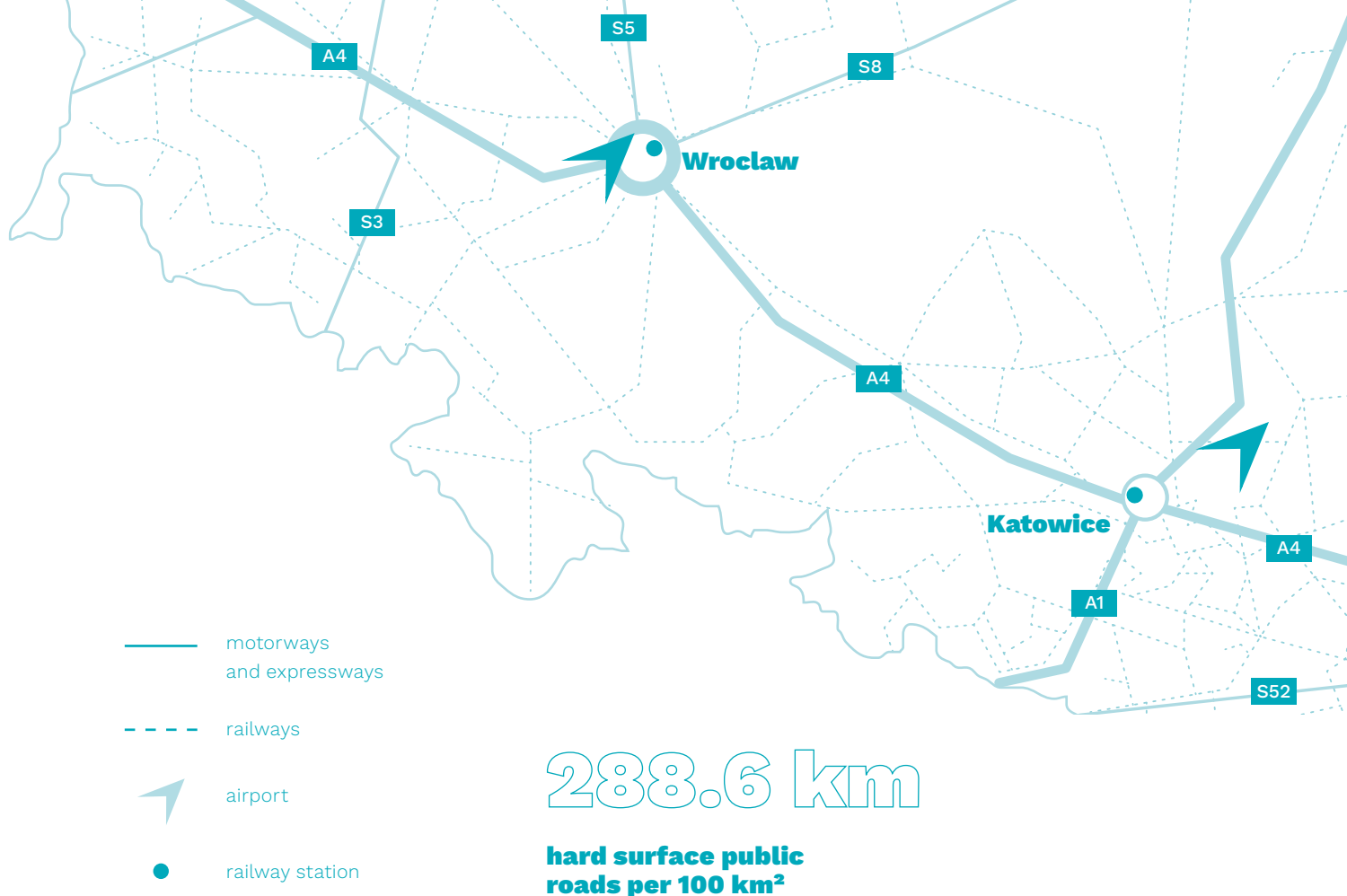
Already fifteen years ago, Wrocław focused on the development of cooperation within the agglomeration and invited neighbouring communes to join it. Today, investors admit that the creation of the Wrocław Agglomeration Development Agency was exactly what the city needed. ARAW already cooperates with 30 communes from Lower Silesia and is so effective that companies indicate its support as one of the investment incentives of Wrocław. Within over a decade, the Agency has brought 200 investors to the city, who created about 95 thousand jobs. “For many years Wrocław has been one of the most attractive investment cities in Poland,” says Ewa Kaucz, President of ARAW.

There isn't one dominating sector in the Wrocław agglomeration, there are both manufacturing companies and giants providing modern business services. Today, the agency focuses on attracting technologically advanced projects such as R&D centres, industry 4.0, intelligent factories. Currently, it is working on 50 projects. The city is also thinking about other projects—from the perspective of the entire agglomeration; at the beginning of 2019, from the initiative of the Mayor of Wrocław, a group of nearly 50 local government officials established the Wrocław Metropolitan Area. This will allow the development of transport within the agglomeration and support the restoration of transport functions of the Oder River.

The household goods sector is represented by Whirlpool, BSH, Electrolux and LG Electronics, the automotive industry by Daimler, Toyota and VW whilst the aviation industry by Ryanair, Collins Aerospace and XEOS. In modern services sector Wrocław is the third largest hub in Poland. There are nearly 170 companies operating in the city, which employ 47.5 thousand people. Some of the brands are really well known, as for instance Google, IBM, Nokia, Credit Suisse or BNY Mellon. Thanks to high quality of life, the city as one of few in Poland has a positive migration balance, which is further strengthened by about 120 thousand students.

Wrocław is friendly to foreigners and especially popular among investors for whom Germany is a key market. Multilingualism of the city is supported by numerous public schools, bilingual classes, where lessons are also conducted in German, English, Spanish or French. Besides the 27 existing universities, this academic year the first students will be invited to take part in a new teaching program offered by a branch of the British Coventry University. The university decided to establish its branch in Wrocław after receiving enthusiastic encouragement from investors i.e. future employers of its students.

**Wrocław has been working for its excellent reputation as an investor-friendly city since the beginning of the 21st century. And it does not slow down.**



## CLOSE TO EUROPE

Wrocław knows how to make full use of the advantages of its location. The city is located along the oldest Polish A4 motorway leading from Ukraine to Germany, S5 expressway (leading to Poznań) and S8 expressway (connecting the city with Łódź and Warsaw) start here whilst S3 route connecting Polish ports in Szczecin and Świnoujście with southern Europe runs nearby. The airport in Wrocław is intensively developing its operations. Within the last decade it has doubled the number of passengers to over 3 million people per year and has helped transport over 10 thousand tons of freight. The network of connections already covers most the EU countries, and the route to Lviv facilitates travelling for the more than one hundred thousand Ukrainians living in the city. Wrocław is connected by rail with the whole of Poland and with cities abroad..



## MENTORS OF ENTREPRENEURS

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“The role of the city’s representatives is to help the investor—not only on the stage of choosing the location for the investment or starting the activity, but also later. We believe that a comprehensive and professional approach is an effective magnet for companies,” says Jacek Sutryk, Mayor of Wrocław. Investors, regardless of the sector or size of the enterprise, can count on the support of the Wrocław Agglomeration Development Agency. The Agency was established in 2005 from the initiative of the Mayor of Wrocław and representatives of the communes surrounding the metropolis, initially a dozen or so, and now already 30. It is made up of a team of several specialists, who, at a request, prepare reports on the labour market, real estate or forms of public aid which meet the needs of specific companies.

They organize meetings with university authorities, companies operating in the region or institutions supporting business, indicate available locations for offices or factories, not only in Wrocław, but also in the surrounding communes. When a company decides to locate an investment, ARAW prepares a scenario of promotional and marketing activities that support e.g. recruitment. What is important, 80% of the agency’s time is devoted to settled investors. The range of services is wide, and includes assistance in relocation, configuration of public transport to meet the needs of the company or establishing cooperation with secondary schools or universities.

“We offer one-stop-shop support, which means that we arrange a fast track for matters that need to be dealt with in public institutions,” stresses the president of ARAW. In the agglomeration there are also other institutions supporting the development of innovative business. These include Wrocław Technology Park, Wrocław Industrial Park, Wrocław Technology Transfer Centre, Lower Silesian Innovation and Science Park or PORT—Polish Technology Development Centre belonging to Łukasiewicz Network—the third largest research network in Europe. Besides property tax relief, Wrocław investors can also receive government support—income tax relief within the Polish Investment Zone, support from the Innovation Box programme and relief for research and development activities.

There are as many as three special economic zones in the agglomeration, although since 2018 companies no longer have to invest directly in the area belonging to the zones in order to receive their support. The leader is the Wałbrzych Special Economic Zone “Invest-Park”, which operates in as many as 174 communes. “In case of large and complex projects, specially appointed teams of experts from WSEZ work together to support entrepreneurs in the investment process,” explains Krzysztof Drynda, Vice President of the WSEZ.

**Strong support for business is one of Wrocław’s main assets and it is reflected not only in the work of individual institutions, but also in the general philosophy guiding the organization of the city.**

## A CITY OF EXPERTS

Wroclaw alone has 640,000 inhabitants, but the metropolitan area is inhabited by even 1.2 million people. Lower Silesia is also a magnet for foreigners, most of whom are Ukrainians and Belarusians. The number of Ukrainians is estimated at even 100 thousand people. Wroclaw is a dynamic labour market, the unemployment rate in Lower Silesia amounts to about 6 percent, but in the city itself it has already fallen to under 3 percent. Investors admit that the image of a friendly place helps in the recruitment of employees from outside Wroclaw. "Today, Volvo Polska employs people representing over 30 nationalities who have moved here especially for us," says Małgorzata Ryniak, director of Volvo Group IT.

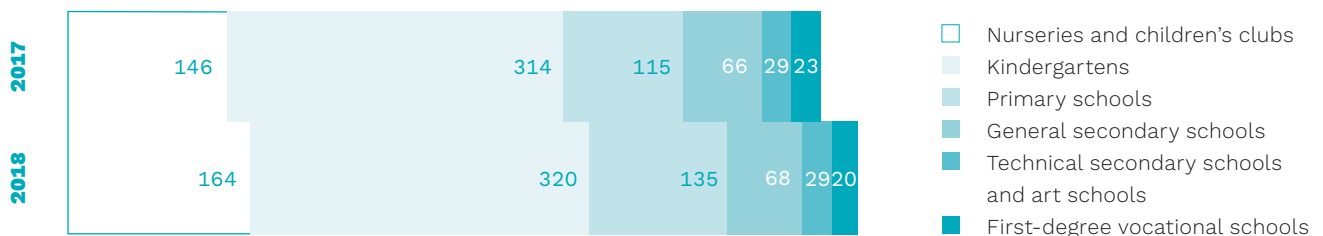
When the Antal group conducted a study on the attractiveness of cities for career development among middle managers, Wroclaw was no 1 twice in a row. The future capital of the city is the group of people that will be entering the labour market, i.e. almost 115 thousand students from 25 universities located in Wroclaw. 60% of these people come from outside of Wroclaw. The Wroclaw University of Technology is one of the leading Polish technical schools. Over 16 thousand students chose IT and related fields of study: telecommunications, robotics, automation.

Soon, Coventry University will open its branch here, offering its students British diplomas and studies that also teach soft skills such as project management. "While studying in Poland, you will be able to obtain a British diploma, and the costs of living here are significantly lower," says John Dishman, Vice-Chancellor of the University. Initially, four faculties will be launched: IT, digital security, business management, tourism and hospitality. The program provides internships in companies, flexible curriculum and teaching mode, and you can join the course of studies every 6 weeks. The university expects students from Central Europe, but also from India, China and Africa.

High level of education offered by schools and a large number of students have a direct impact on business. "We are able to attract

**Companies decide to locate their investment in Wroclaw mainly because of the high-class specialists, they can find here. In Google's office in Wroclaw, employees speak 27 languages.**

### EDUCATION



projects that require highly specialized employees. More and more companies starting their operations in Wrocław choose this city because of its intellectual potential,” says Ewa Kaucz, president of ARAW.

. For seven years now, the city’s “Mozart” program has been operating, the aim of which is to build cooperation between universities and business. Under the program’s framework the city finances the internship of research workers in innovative companies. Today, the largest number of new jobs are created by companies that decided to invest here many years ago. 12 years ago Credit Suisse opened a financial centre for 200 people in the city and today it employs 4,000 people. Volvo started in Wrocław with a 40-person office, today it employs 1000 specialists in the IT centre itself, and in the entire service sector—a total of 1500. “Wrocław is one of the largest and most dynamically developing hubs of new technologies in Poland. Depending on the rankings, it is the second or third in terms of new jobs, and technologies,” says Małgorzata Ryniak. One of the magnets attracting shared services centers to the Oder River is knowledge of foreign languages. Children learn languages in bilingual classes and in the city there are schools teaching in German, English, French and Spanish as well as teaching according to educational programs from different countries, which makes it easier for children of people coming from other countries to continue their education. Universities offer English language courses.

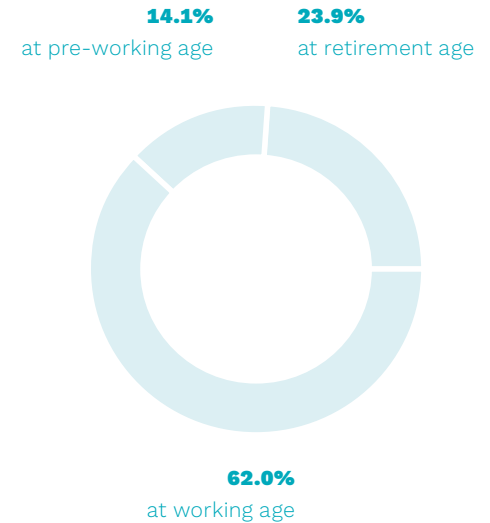
“Wrocław’s universities have several important advantages—they provide the right educational path to students, offering them courses in finance, IT, engineering, and they also put emphasis on English and teaching one more foreign language, says Artur Sawicki, Head of Business Centre Infor Poland.

Many companies for which German customers are the key and which need employees to serve this market have invested in the city. “Wrocław is one of the few cities in Poland where you can find a large number of employees fluent in German. Knowledge of German is so important that it often becomes more important than the specific technical skills that we will teach the employee,” notes the head of Infor.

In Wrocław, cooperation between business and universities is successful in the form of dual studies. This scheme is currently being developed by the University of Technology within the scope of faculties of mechanics and mechanical engineering. Infor provides its IT system, which is used by e.g. Boeing at the Faculty of Computer Science and Management of the Wrocław University of Technology. The University of Life Sciences offers studies in the field of gastronomy organization, private universities—in the fields of management, tourism, finance and logistics. There are plans for a new dual course of study at the University of Economics with the participation of the University of Technology addressed to employees of future global service centers.

## POPULATION

2018



Wrocław also highly values the employees from Ukraine who settle here. The office has appointed the first spokesperson for residents of Ukrainian descent, who helps them gain access to language courses, training and information, as well as facilitates the integration process. Wrocław has also set up an Infolink—an information point for foreigners coming to Wrocław. Employees and volunteers help to legalize the stay and they also help with other formalities completely for free.

## COMFORTABLE LIVING CONDITIONS AS A MAGNET

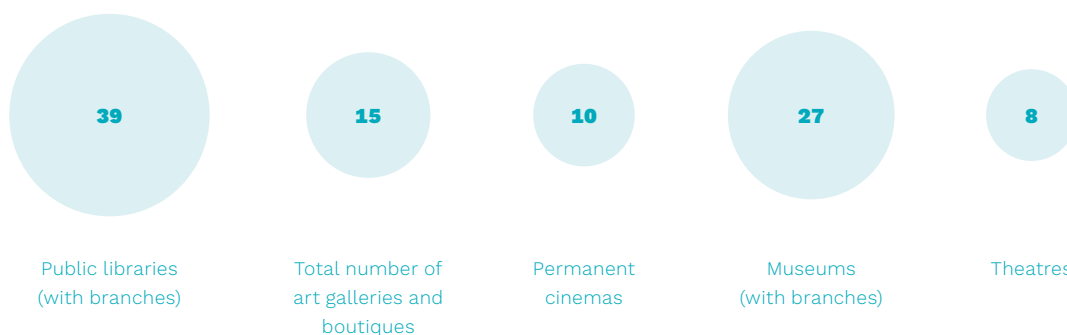
This image of Wrocław is so strong that investors are surprised to discover that foreign workers themselves are willing to move to the capital of Lower Silesia, and the city was chosen as the best Polish city for work and life by Foreigners in Poland in 2016.

As Artur Sawicki, the head of the Polish branch of American Infor, which started its operations in Wrocław three years ago, recalls, the city on the Oder River competed with Krakow for this investment. The final decision was made by the president Charles Phillips, who stated: “We choose Wrocław, because you can see at the first sight that it is a young city, full of people with energy i.e. the kind of people we need.” Recently, the company has opened the European Training Centre—Infor Academy—here. The city won the project for which it competed with Barcelona, and one of its winning cards was logistics, including a dense network of air connections with the most important European destinations.

Tourists who value comfort can use the services of seven five-star hotels, including the phenomenal Monopoly with a view of the Wrocław Opera House. Relocation agencies take care of the comfort of new

**The brand of  
Wrocław attracts  
new residents  
even from abroad.  
It tempts them  
with the promise  
of a perfect  
combination of  
attractive job  
offers and the  
comfort of living  
in a vibrant city.**

## CULTURE



residents, including moving managers. They help with the relocation of families, finding apartments and a place in schools. The International Club of Friends of Wrocław, an informal network of support and information for expats, as well as Internatio, an Internet service for the international community of Wrocław, have been operating here for 15 years.

Wrocław earned the title of the European Capital of Culture in 2016. Tickets for the 40<sup>th</sup> edition of the Actors' Song Review were sold out long before the beginning of the festival, and every July the New Horizons Film Festival takes place in the city.

Jewish culture festivals, Wratislavia Cantans and the International Storytelling Festival are well known. Music fans often direct their steps to the National Forum of Music, one of the best concert halls in Poland. Wrocław also offers easy access to health services in facilities where medical staff speak English. The residential offer is developing dynamically, newcomers can adjust their apartments to their expectations, the market offers luxury apartments in new buildings, stylish old tenement houses, post-industrial lofts or single-family villas with gardens.

In 2018 Wrocław won the title of the European Best Destination. The beauty of the 800-year-old city is the first advantage that visitors see. The centre of the city is the Old town and one of the most beautiful Polish markets. The Old Town is surrounded by the city moat and the Oder River, on which cruise boats, canoes and water bikes circulate. In the summer, the city's beaches are becoming more and more popular, while the local zoo is a year-round attraction, along with the nationally famous Africarium, which is visited by 2 million of people a year. The latest attraction is Hydropolis, a multimedia water museum. Opposite the zoo there is a symbol of Wrocław—the majestic Centennial Hall with Szczytnicki Park occupying 112 hectares around it. Green areas in Wrocław occupy a total of 2630 hectares accounting for almost 40% of the city's area. Parks are even in the city centre and they run along the boulevards along the Oder River and the city moat, up to the botanical garden on Ostrów Tumski, the island with the oldest monuments of the city and the cathedral.

The residents of Wrocław have learnt to love bicycles—in the city itself there are now 434 km of all kinds of bicycle routes, 126 km of which run along embankments and parks. Thanks to annual investments, new routes and parking lots are being built, the Bike & Ride system is working, and cycling projects are notoriously winning in the civic budget. The city is strongly fighting smog—only in 2018 PLN 15 million was spent on this purpose, and the development of modern public transport helps to improve air quality. A car-sharing network with the first electric Vozilla system in Poland has recently been added to the fleet of buses and trams. There are also 74 charging points for e-cars (28 stations).

The great advantage of the city is its location, Wrocław is surrounded by forests, the nearest mountain Ślęza is located 45 minutes away by car, skiers need just two hours to find themselves on the slope and the same applies to tourists who wish to start hiking in the Karkonosze Mountains. It is hard to find a better place to live.

## HEALTHCARE\*

2017 | per 10,000 inhabitants

48 27

beds

doctors

\* data regarding

Dolnośląskie voivodship

## OFFICE FOR EVERYONE

The dynamically developing sector of modern business services needs, above all, attractive offices. Developers are trying to meet the huge demand and the available modern office space has doubled in just four years, increasing from 595 thousand sqm to over a million sqm in 2018. More offices will be opened soon, with 200,000 sqm of space under construction. Wrocław presents its plots and premises on the Real Estate Exchange, on the Town Hall's website, and the fact that 58% of the city's area is already covered by the zoning plan helps in discussions with investors. Only in 2019 Wrocław will be looking for buyers for at least ten investment areas within the city. Within the borders of Wrocław, the Wałbrzych Special Economic Zone also offers investment land for sale, this year it is for example a plot of 32,000 sqm located in Złotniki.

The residential market is flourishing, last year 9.4 thousand apartments were completed and a year before 8.8 thousand. Wrocław offers accommodation for all travellers, guests can choose between seven five-star hotels, ten four-star hotels and a total of 30 hotels of a lower category.

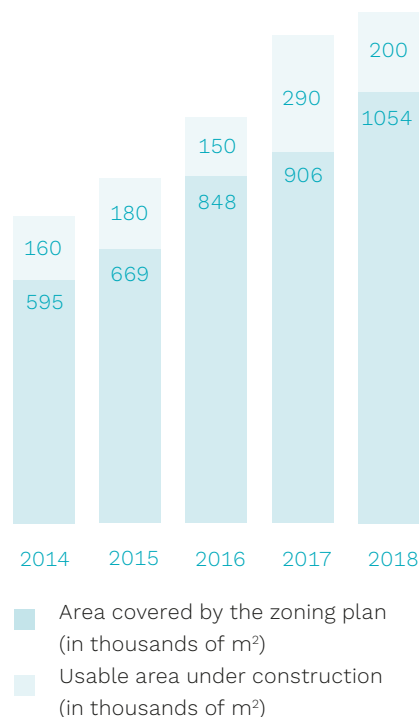
WSEZ offers assistance with the search for large areas for investment. "We have signed cooperation agreements with municipalities, they show us their land and we start looking for a buyer among investors," explains Krzysztof Drynda, Vice President of the Wałbrzych Special Economic Zone "Invest-Park". Unlike the more fragmented eastern areas of Poland, Lower Silesia has large areas of state-owned land at its disposal. What is more, an investor can obtain SSE's support for any plot of land if it is located in one of the 29 poviats where the zone operates.

## START-UPS KNOW HOW TO EARN MONEY

Only last year 11,212 new companies were established in Wrocław, the highest number in five years, and altogether 124,400 companies operated in the city. In this way, the percentage of companies per one thousand inhabitants increased from 15.6 four years ago to 17.5 in 2018. As many as 96 percent of all the companies operating in the city are micro companies, employing up to 9 people, while small companies account to 2.5 percent. Large enterprises, employing 250 people or more constitute only 0.1 percent of the total number of companies.

**Wrocław will find a suitable place for every investor, from an office for a start-up or a freelancer, through half of a high-rise building for a shared services center, to land for building a big factory.**

### MODERN OFFICE SPACE





Growing income of the city proves that Wrocław is a good place to do business—in 2018, Wrocław earned PLN 115.4 million from CIT, with PIT revenues reaching PLN 1.3 billion PLN.

And it may get even better, because the VC funds operating in Wrocław in the coming years may spend up to PLN 700 million on the development of start-ups, according to ARAW's data. According to research conducted in 2018 by the Startup Poland Foundation, young companies in Wrocław focus on big data analysis and analytics, and at the same time they also belong to fundraising leaders. 30 percent of projects that raised over PLN 10 million originate from this group of companies. Infermedica is a recent success story. This company, which uses artificial intelligence for preliminary diagnosis of patients, gained 14 million PLN in the seed round, managed by the Estonian fund Karma Ventures.

Another Wrocław-based start-up Syntoil ranked second this year in the global Chivas Venture competition. Start-ups can count on the ARAW Business Support Centre and its Startup Wrocław team. It cooperates with young technology companies and helps develop connections between the local start-up ecosystem and big business.

"There are a lot of start-ups originating from universities, which operate in the field of science-tech. These companies, such as XTPL, Saule Technologies, Genomtec or Nestmedic, are internationally successful," says Ewa Kaucz, President of ARAW. It is not surprising that Wrocław has gained the title of a European medium-sized city with the best strategy for attracting foreign direct investments (FDI Magazine 2016 and 2017), as well as a city with the best investment support strategy (Emerging Europe Awards 2018).

The Wrocław Technology Park, whose main owner is the commune of Wrocław, is developing rapidly. The company is planning further investments and launching new office space. The parks are designed for micro, small and medium technology companies, which find it much easier to start their business in such a city due to attractive lease rates and the availability of research infrastructure. Entrepreneurs can count on substantive, legal or accounting support.

The technology and creative sector is of great importance for the city's economy, and at the same time its representatives willingly engage in local initiatives. This can be seen at the example of the event Made in Wrocław, which is a combination of a free trade fair for residents and a business conference. Over five thousand guests are invited to see the Wrocław business presenting its innovations, start-ups and global technologies. "The aim is to discuss the economic strength of the Wrocław brand, where it comes from as well as discuss the intellectual and innovative potential of the city. We also show the most modern solutions, such as the electric bus that is being built in the Wrocław factory," says Ryniak.

**The city is developing not only thanks to big foreign investments, but also thanks to vibrant local business.**

**Area covered by the zoning plan**

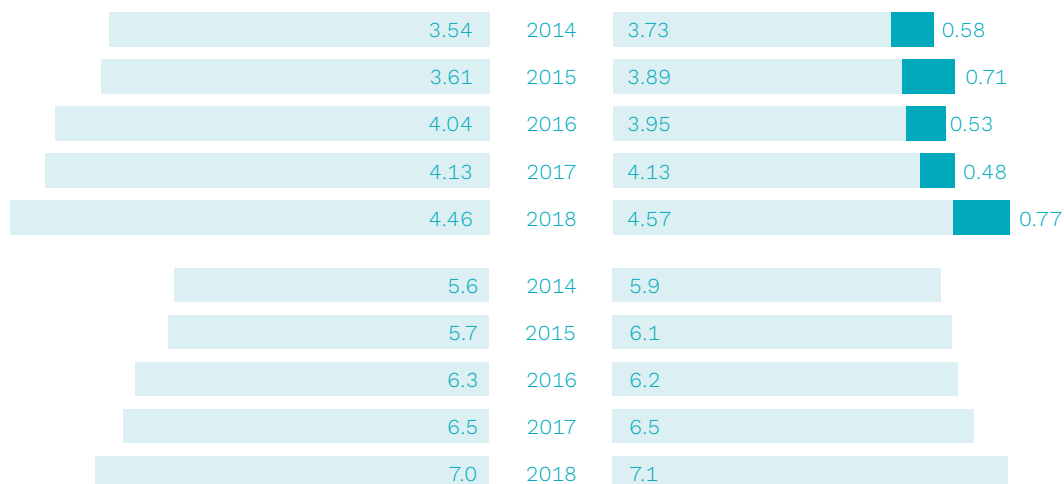
**58.1%**

## BUDGET

Revenues (in billions of PLN)

Expenditure (in billions of PLN)

■ Investment outlays



Revenues (in thousands PLN per inhabitant)

Expenditure (in thousands PLN per inhabitant)

## EDUCATIONAL FACILITIES

2017

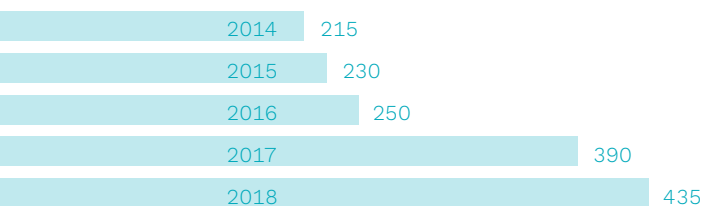
**25** universities  
**119,627** students

2018

**25** universities  
**114,825** students

## BIKE ROUTES

(km)



## ELECTRIC CARS

2018

**28** charging station

**HOUSING RESOURCES**

2017

**8,875**139 flats per  
10,000 people

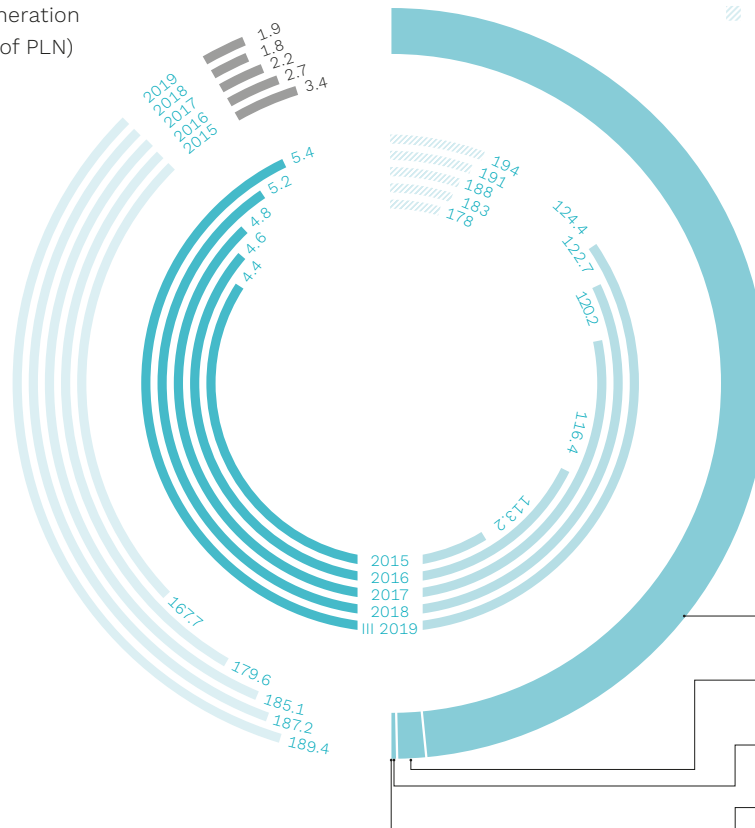
2018

**9,446**147 flats per  
10,000 people**Completed  
flats****40%****of the city is covered  
by green areas****HOTELS**4  
★4  
★★22  
★★★10  
★★★7  
★★★★**48****hotels with  
conference facilities**

- Average employment in the enterprise sector (in thousands of people)
- Unemployment rate (%)
- Average remuneration (in thousands of PLN)

**COMPANIES IN THE CITY**

- Enterprises operating in the city (in thousands)
- ▨ Enterprises operating in the city per 1,000 inhabitants

**11,212****new companies were  
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ACCORDING  
TO EMPLOYMENT**

- 96.9%** of micro companies (up to 9 employees)
- 2.5%** of small companies (10–49 employees)
- 0.5%** of medium-sized companies (50–249 employees)
- 0.1%** of large companies (over 249 employees)

Sources: Central Statistical Office (GUS), survey conducted in the city, own sources

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## Photos of cities

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## Texts

Cities to carry Poland into the future ( Wojciech Romański), Andrzej Krakowiak), The ugly duckling turning into a beautiful swan (Prof. Witold Orłowski), interview with Izabela Olszewska (Piotr Mazurkiewicz), interview with Jens Ocken (Adam Woźniak), interview with Fabio Pommella (Piotr Mazurkiewicz), interview with Michael Muller (Paweł Szaniawski), interview with Philippe Close (Anna Stojewska), interview with Peter Kurz (Paweł Szaniawski), interview with Prof. Beata Smarzyńska-Javorcik (Grzegorz Siemionczyk), interview with Charles Taylor (Adam Roguski), Białystok (Grzegorz Siemionczyk), Bydgoszcz (Wojciech Maroszek), Gdańsk (Michał Stankiewicz), Katowice, Poland (Izabela Kacprzak), Kraków (Izabela Kacprzak), Lublin (Anna Cieślak-Wroblewska), Łódź (Beata and Robert Sakowski), Olsztyn (Beata Waś, Patryk Pułkowski, Magdalena Spiczak-Brzezińska, Sylwia Płaszczyńska-Capła, Michał Bartoszewicz, Rafał Radzyński), Rzeszów (Danuta Walewska), Szczecin (Michał Stankiewicz), Toruń (Beata i Robert Sakowscy), Warsaw (Wojciech Maroszek), Wrocław (Aleksandra Ptak-Igłewska)

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Bydgoszcz Metropolis Association is a union of Bydgoszcz and 19 surrounding partner local governments. The aim of our Association's activity is voluntary cooperation and mutual support of cities, communes and districts, as well as undertaking joint actions for the social and economic development of our metropolis.

The undertaken initiatives are aimed to improve the quality of life of its inhabitants, to build the potential and to promote the area of the Bydgoszcz Metropolis Association as the strongest economic centre in the Kujawsko-Pomorskie Voivodeship.  
The heart of the region beats here!

**Rafał Bruski**

**President of the Board of the Bydgoszcz Metropolitan Association**

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