



Focus on

March 2014

Tri-City

Investment attractiveness

Tri-City is a great example of perfectly cooperating metropolis combining three cities: Gdansk, Gdynia and Sopot, located in the north of Poland. It has a direct access to the sea, its own airport and railway junction. It is one of the fastest growing urban centers in Poland with an area of nearly 415 sq km and a population of over 740,000 inhabitants, which makes this region perfect for outsourcing industry. It is Invest in Pomerania to be responsible for the development of the outsourcing sector in Tri-City - agency recognized by Invest in Poland Agency as the best investor assistance center in Poland. The team of Invest in Pomerania consists of excellent experts specialized in handling BPO, ITO, R&D, SSC and Call/ Contact Centre projects.

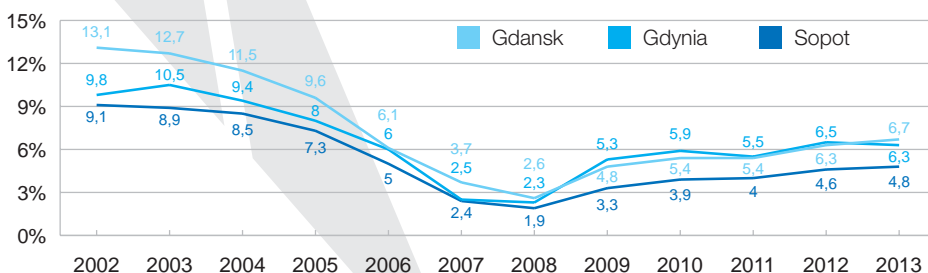
At the time of presenting this report, 69 Outsourcing Centers were conducting operations in Tri-City.

The largest university in the Tri-City is the University of Gdansk. Every year nearly 26,000 students graduate from the University of Gdansk and other universities in the region. Some of the young people entering the labor market are graduates of postgraduate studies concerning BPO. They constitute an excellent staff for the sector of modern business services. Gdansk airport has direct connections to 39 airports in Europe, including the main cities of Great Britain, France, Sweden, Germany, the Netherlands and Ireland. The airport of Gdansk is reachable from European cities within 2-3 hour flight.

Tri-City received Outsourcing Stars award, for the largest percentage increase in graduates of economics and computer sciences in 2013. Local authorities really care for the professional preparation of employees working in the BPO sector, which is constantly being proved by organizing local initiatives.

Welcome to Focus on Tri-City!

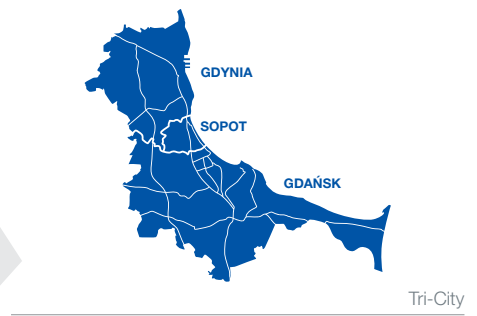
Unemployment rate



Europe



Poland



Tri-City

Tri-City Metropolitan Area:

3,073.21 sq km

Population of Tri-City Metropolitan Area:

1,260,092

Professional activity ratio with regard to population in the age of 15 or more according to the level of education

higher	78,0%
post-secondary and vocational secondary	65,4 %
secondary of general education	53,2%
vocational	64,0%
secondary junior (gymnasium), primary, lower	22,7%

Education

Number of kindergartens: **389**

public: 112	private: 277
in this 2 multilingual kindergartens	

Total number of schools: **375**

data from 2011/2012 including primary schools, gymnasiums, post-gymnasium schools, post-secondary schools

primary schools: 145	secondary junior schools (gymnasiums): 111	secondary schools: 119
Students 36,580	Students 18,655	Students 13,869
Graduates 5,796	Graduates 6,060	Graduates 4,588

Number of language schools: **272**

Number of colleges and universities:

22

Public colleges and universities: **9**

Private colleges and universities: **13**

3 schools of tertiary education offer philological studies

Students	IN TOTAL	Graduates
8,434	Management	3,038
3,758	Philology	887
2,808	Teacher Training and Education science	906
4,475	Finance and accounting	1,417
2,720	Administration	1,180
3,211	Law	497
2,474	Computer Science	599
1,509	Logistics	0
3,261	Economics	1,013
686	Political Science	322
2,196	Mechanics and Mechanical Engineering	271
375	Management and Product Engineering	67
433	International relations	106
1,193	Psychology	161
1,857	International economic relations	496
397	Cultural studies	0
1,332	Automatics and robotics	379
832	Sociology	323
878	Computer science and econometrics	189
1,363	Mathematics	346
1,092	Electronics and telecommunications	0
55,466	Other fields of study	15,878



UNIwersYTET GDAŃSKI

The University of Gdansk:

English, German, Roman, Russian, Polish, Spanish, Sinology, Scandinavian, Slavic, American studies.



Ateneum:

Spanish, Italian, English Philology



Wyższa Szkoła Nauk Stosowanych:

English, Spanish Philology

Transportation

Lech Walesa Airport



Number of arrivals and departures

Year	Total passenger traffic	Regular flights	Charter flights
2013	2 870 321	2 678 250	183 523
2012	2 905 710	2 674 136	223 619
2011	2 463 222	2 267 823	187 990
2010	2 231 610	2 047 904	167 024
2009	1 910 670	1 743 455	154 449



Accessibility of motorways:

**Motorway A1 /
7 national roads S7, S6,
91, 55, 22, 20, 6**



Car rentals: **157**



Number of taxi companies:
29 TAXI companies (3982 cars)



Number of bus lines:
125 day bus lines + 17 night bus lines



Number of tram lines:
12 day tram lines



Number of trolleybus lines:
15 day tram lines



Railway/number of trains:
201 per day

Number of passengers:
38,5 m. annually

Flight destinations: 39

Alesund (Norway)
Amsterdam (the Netherlands)
Barcelona (Spain)
Bergen (Norway)
Berlin (Germany)
Bristol (UK)
Cork (Ireland)
Doncaster-Sheffield (UK)
Dortmund (Germany)
Dublin (Ireland)
Edinburgh (Scotland)
Eindhoven (the Netherlands)
Frankfurt (Germany)
Glasgow (UK)
Goteborg (Sweden)
Hamburg - Lubeck (Germany)
Haugesund (Norway)
Cologne - Bonn (Germany)
Copenhagen (Denmark)

Cracow (Poland)
Kristiansand (Norway)
Liverpool (UK)
London - Luton (UK)
London - Stansted (UK)
Lublin (Poland)
Malmo (Sweden)
Manchester (UK)
Mediolan Bergamo (Italy)
Munich (Germany)
Oslo-Torp (Norway)
Oslo Rygge (Norway)
Paris Beauvais (France)
Poprad (Slovakia)
Stavenger (Norway)
Stockholm-Skavsta (Sweden)
Trondheim (Norway)
Turku (Finland)
Warsaw (Poland)

Distance from Tri-City to other cities in kilometres

Warsaw	Wroclaw	Poznan	Szczecin	Lodz	Katowice	Cracow	Rzeszow	Lublin	Berlin	Hamburg	Prague	Minsk	Kiev	Moscow	Vilnius
354	472	327	348	353	550	601	668	523	490	748	780	716	1127	1461	577

Business

Number of business entities in total:

195 182

Supply of office space	
total existing area of offices of A and B+ class	218,600 sqm
total area of offices of A and B+ class under construction	75,800 sqm
total planned area of offices of A and B+ class	650,000 sqm
average rent of A class offices in Tri-City	EUR 12 - 13
Total existing modern office space	430,400 sqm

Warehouse space	
total existing warehouse space	200,000 sqm
total warehouse space under construction	25,000 sqm
total planned warehouse space	700,000 sqm
average rent of warehouse spaces in Tri-City and in the neighbourhood	EUR 2,90 - 3,70

Class	Number of buildings	Total space
A and B+	30	218,600 sqm
B	47	211,800 sqm

Events in Tri-City

European Forum for New Ideas

Infoshare

Balt EXPO

Amberif

Social Media Convent

TRAKO

Smart Metropolis

Technicon-Innovation

Gdynia Businessplan

Go Creative

Startup Venture

Real Estate Forum

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Examples of office buildings

Year	Status	Building	Address	Owner	Area	Car park places	Certificate
1998 - 2011	EX	Allcon @ Park	Słowackiego 171-175	Allcon Investment	18,900 sqm	595	-
2008 - 2012	EX	Garnizon.biz	Grunwaldzka 184-188	GI Hossa	15,600 sqm	500	-
2008 - 2010	EX	Arkońska Business Park	Arkońska 2-6	SEB / PZU	26,700 sqm	700	-
2008 - 2014	EX	Łużycka Office Park	Łużycka 6	Allcon Investment	27,700 sqm	867	-
2011 - 2014	EX	Olivia Business Centre	Grunwaldzka 472	TPS	38,700 sqm	1,397	-
2012	EX	BCB Business Park I	Azymutalna 9	Bałtyckie Centrum Biznesu	9,250 sqm	316	-
2013 - 2014	EX	BPH Office Park	Jana Pałubickiego 2	Euro Styl	23,900 sqm	600	-
2014	UC	Centrum Biurowe Neptun	Grunwaldzka 107/109	Hines	15,600 sqm	159	BREEAM (application)
2013	EX	Alchemia I	Grunwaldzka 363-417	Torus	16,200 sqm	398	LEED (Platinum) - pre-certified
2015	UC	Tryton I	Jana z Kolna 11	Echo Investment	8,000 sqm	114	-

EX - existing building, UC - building under construction

Examples of warehouse buildings

Building	City	Developer	Existing area	Area under construction	Planned area
Prologis Park Gdańsk	Gdansk	Prologis	91,000 sqm	-	-
Panattoni Park Gdańsk	Gdansk	Panattoni	30,000 sqm	-	17,000 sqm
Kowale 2	Gdansk	7R Logistic	26,000 sqm	-	-
Goodman Pomorskie Centrum Logistyczne	Gdansk	Goodman	14,000 sqm	-	515,000 sqm
Centrum Magazynowe Hutnicza	Gdynia	Mega SA	12,000 sqm	-	-
Segro Logistics Park Gdansk	Gdansk	Segro	5,000 sqm	25,000 sqm	57,000 sqm

Institutions supporting entrepreneurship

Among business - related institutions (except for scientific and research institutes) which influence economic development of the region, there are the following units:

Technology Parks:

Pomeranian Science and Technology Park ■ Gdansk Science and Technology Park

Subzones:

Baltic Port of New Technologies ■ Gdansk Klukowo ■ Gdansk Kokoszki

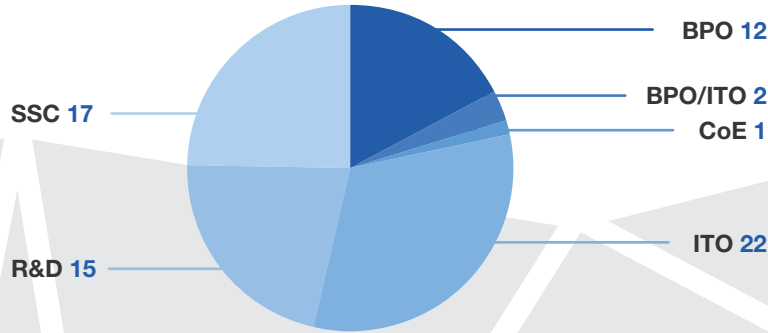
Business Incubators and other organizations:

Starter ■ Pomeranian Innovation Incubator ■ Business Centre Club ■ Agency for Promoting Female Economic Activity ■ Pomerania Development Agency ■ Invest in Pomerania ■ Economic Foundation ■ Gdańsk Entrepreneurs' Foundation ■ Gdynia Entrepreneurship Support Centre ■ Gdansk Business Club ■ Employers of Pomerania ■ Institute for Market Economics ■ Inveno ■ Pomeranian Special Economic Zone ■ Center for Technology Transfer ■ Free Enterprise Association ■ Academic Business Incubator Business Link ■ Gdansk Economic Development Agency

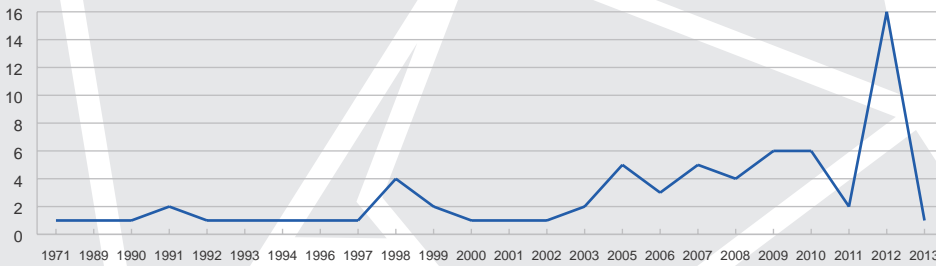
Business: Outsourcing

Innovative business services

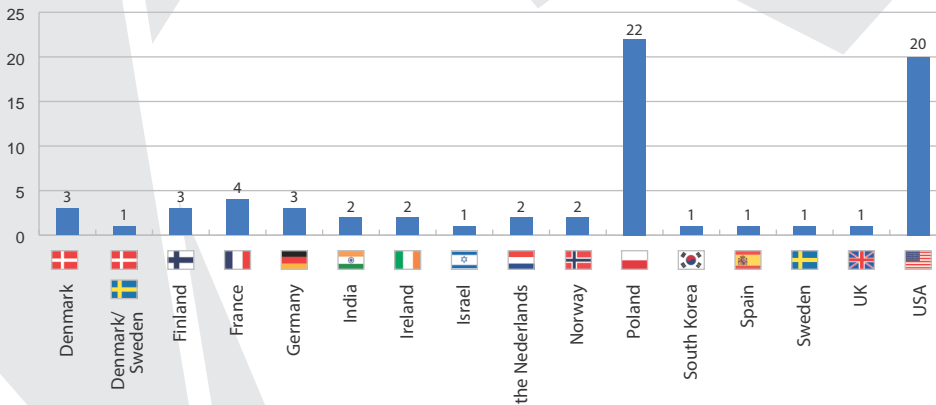
Operating activity



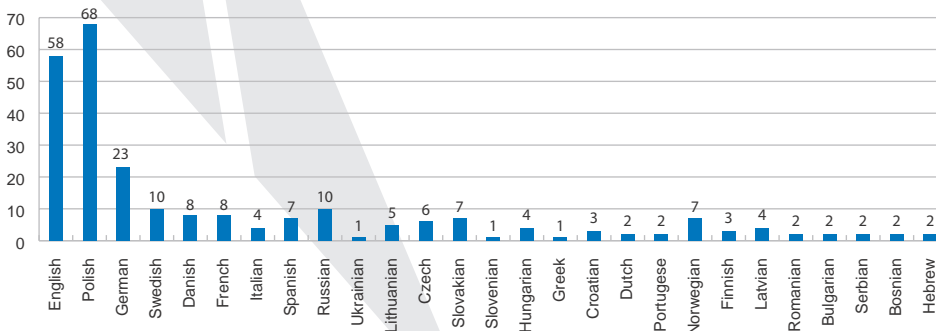
Number of investments annually



Number of investments - country of origin



Outsourcing centres with foreign language services



Organisation/business entity	Services provided
A&A Biotechnology	R&D
Axiom	IT
ADVA Optical Networking	IT / R&D
Arla Global Financial Service Center	F&A
Asseco	IT
Atena	IT
Bank BPH/GE Capital	F&A
Bayer	F&A
BEST	Debt Collection
Blue Media	IT
Call Center 24	CC
Compuware	IT
Contact Center	CC/Telesales/ Databases/ Marketing research
Det Norske Veritas	R&D
Dom Finansowy QS	CC
EATON AUTOMOTIVE	R&D
EATON Truck	R&D
Energa	F&A / HR / Procurement
Fineos	IT
First Data	F&A

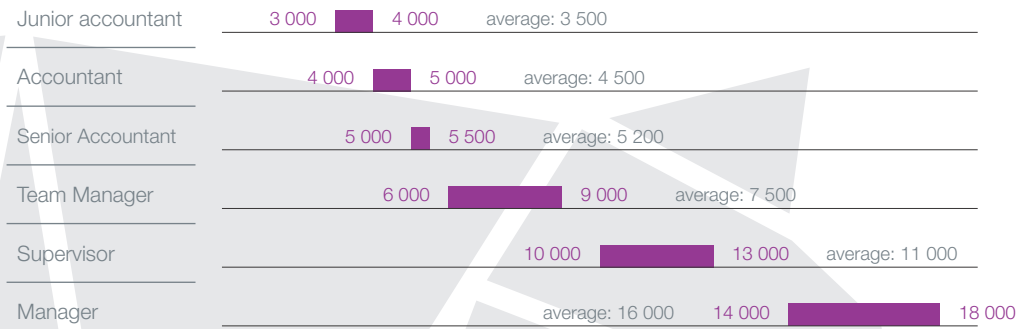
Organisation/business entity	Services provided
Flugger	F&A / IT / HR / Procurement
General Electric	R&D
Geoban	BPO/F&A
Goyello	IT
Gratka Technologie	IT
Hempel	F&A / IT
HK Finance&Accounting	F&A
Humax	R&D
IBM Regional Competence and Implementation Centre	IT
Implix	IT
Intel	R&D
Jeppesen by Boeing	IT
Kainos	IT
Kemira	F&A / IT / Customer Service
Lufthansa	IT
Marine Technology Centre Co.	R&D
Masterlease	F&A
Meritum Bank	F&A
Metsa Group	F&A
Misys	IT
Nation-E	R&D
Ncomputing	IT
Nearshoring Solutions	IT
Nordic Services	F&A / IT

OIE Support	CC
OKE Poland	IT
PBP ENAMOR	R&D
Playsoft	IT
PPG	CC
PZU	F&A
Sigarden	R&D
SII	IT
Solwit	IT
Sony Pictures	F&A
Speednet	IT
Star Reefers	Logistics
Stefanini	IT
Synopsys	IT
Telemobile Electronics	IT
Thomson Reuters	CoE
TIM Call Center	CC
TIM Outsourcing	IT
Transcom	CC
UTC Fire& Security	R&D
Willis	F&A
Wipro BPO	IT
Witax	F&A
WNS	F&A
Young Digital Planet	IT / R&D

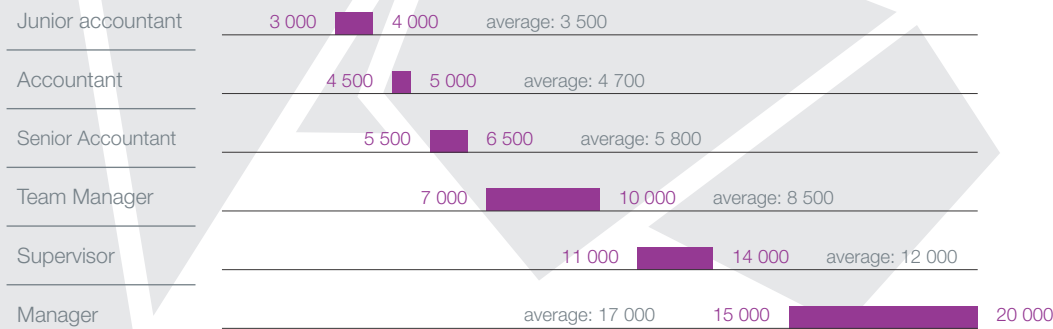
Salaries

Jobs - English speakers (PLN gross)

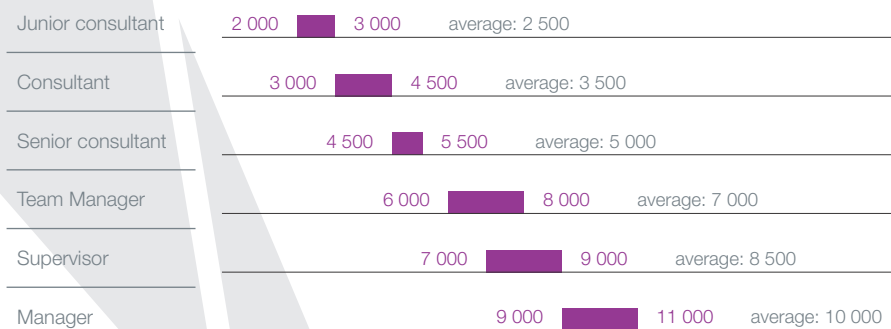
Payables Management / Receivables Management



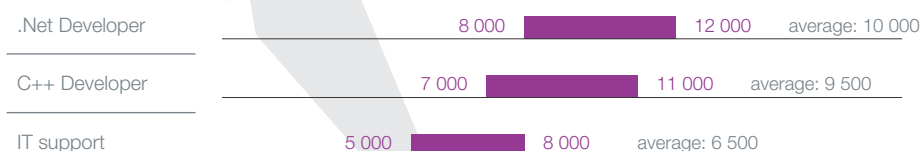
Main Ledger



Call Center



IT



Jobs with other languages - average salaries (PLN gross)

German, French, Spanish, Italian, Russian	Dutch, Swedish
4 000	4500
5000	5500
5500	7000
8500	9500
11 000	11 000
16 000	16 000

German, French, Spanish, Italian, Russian	Dutch, Swedish
4000	4500
5000	5500
6000	7000
8500	9500
12 000	12 000
17 000	17 000

German, French, Spanish, Italian, Russian	Dutch	Swedish
2 500	3 000	3 000
3 500	4 000	4 000
4 500	5 000	5 000
6 500	7 000	7 500
7 000	7 500	8 000
9 500	10 000	10 000

German, French, Spanish	Italian, Russian	Dutch	Swedish
8 500	11 000	12 000	12 000
7 500	9 000	10 000	11 000
4 500	6 000	7 000	8 000

Culture / Entertainment / Recreation



Number of museums: **41**



Number of theatres: **19**



Number of art galleries: **101**



Number of cinemas: **24**



Festivals: **21**



Number of hotels: **109**
50 *** 14 **** 7 *****



Number of shopping malls: **38**



Number of restaurants/ clubs:
**466 restaurants, 242 pubs,
199 pizzerias, 30 clubs**



Fairs: **in 2012; 17 organized fairs, over 2772 exhibitors, 6.534.500 guests**

Sports facilities

4 stadiums
34 indoor swimming pools
613 sports fields
39 sports halls and gyms
14 bowling clubs
16 water ports
33 tennis courts
11 squash courts
14 climbing walls

Major events

St Dominic Fair
Gdańsk Dźwiga Mużę
Open'er Festival
Siege of Malbork
Feta
Ladies' Jazz Festival
Globaltica
Soundrive Fest
Frog
Mozartiana

Conference facilities: **52**

BEST WESTERN Bonum Hotel
BEST WESTERN PLUS Arkon Park Hotel
BEST WESTERN Villa Aqua Hotel
Centrum Galion
Dom Muzyka
Hotel Amber
Hotel Antares
Hotel Artus
Hotel Bartan
Hotel Bayjonn
Hotel Blick
Hotel Dal
Hotel Dom Marynarza
Hotel Dwór Oliwski
Hotel Europa
Hotel Focus
Hotel Gdansk & Hotel Gdansk Yachting
Hotel Grand Cru

Hotel Haffner
Hotel Hanza
Hotel Hilton Gdańsk
Hotel Hotton
Hotel Królewski
Hotel Kuracyjny
Hotel Lival
Hotel Mercure Gdańsk Stare Miasto
Hotel Nadmorski
Hotel Novotel Marina
Hotel Oliwski
Hotel Opera
Hotel Orbis Gdynia
Hotel Orle
Hotel Qubus Gdańsk
Hotel Radisson BLU
Hotel Rezydent
Hotel Różany Gaj

Hotel Scandic Gdańsk
Hotel Sheraton Conference Center & Spa
Hotel Sofitel Grand Sopot
Hotel Szydłowski
Hotel Villa Baltica
Hotel Villa Sedan
Hotel Willa Lubicz
Hotel Wolne Miasto
Hotel Zhong-Hua
OSW Exploris Gdańsk
Ośrodek Szkoleniowo - Wypoczynkowy
Zatoka
Pałac w Leźnie
Stara Wędzarnia
Villa Eva
Villa Pascal
Villa Sentoza

Focus on Tri-City prepared by



PROGRESSIO

in co-operation with



Pro Progressio - foundation supporting growth and promotion of outsourcing industry in Poland. The foundation co-operates with the public and private sector as well as with the international organisations operating in the outsourcing sector.

Pro Progressio is closely related with outsourcing sector media that is with OutsourcingPortal and Outsourcing&More magazine.

Pro Progressio manages the Outsourcing Club, to which it invites business entities providing outsourcing services and organisations operating in direct environment of the sector. The club promotes and supports the development of the outsourcing activities, both in the area of services and production, furthermore, it facilitates the establishment of new contacts and increases the outsourcing brand awareness

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Members of the Outsourcing Club in Tri-City:



Source: Own elaboration, GUS, Randstad, CBRE, PAIIZ, Invest in Pomerania, Lech Walesa Airport