

MOVE TO IMPROVE 2.0



City of POZnań*

Poland



TOP 3 Economic potential
in the fDI ranking – city with
great potential for investors



Outsourcing Stars 2018
The most attractive city
for BPO/SSC sector



A- rating with stable outlook
according to Fitch Ratings,
2019



Municipality for 5!
Awarded by the Institute
of Enterprise of the SGH Warsaw
School of Economics

- 3 Why Poznan?
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10 REASONS TO LOCATE YOUR BUSINESS IN POZNAN



**Business Friendly City –
Local Authority Support**

Title awarded by
Emerging Europe, 2019



**Services centers which expanded
their business in Poznan:**

Franklin Templeton,
McKinsey & Company,
GSK and Rockwool among others



The best quality of life

each month full of unique
and inspirational events



**Convenient infrastructure
and excellent public
transportation**



**Big talent pool with
113,200 students
and about 29,500
graduates annually**



**City support
at every stage
of investment process**

INFRASTRUCTURE



A2 highway connection
with Berlin & Warsaw



Berlin-Poznan, Poznan-Warsaw
2,5h by train



Poznan Metropolitan Railway



Poznan-Lawica airport



Weekly direct flights from Poznan-Lawica



LONDON (STN, LTN)

🕒 1h 10min
✈️ 21 flights a week

PARIS (BVA)

🕒 1h 15min
✈️ 2 flights a week

FRANKFURT (FRA)

🕒 1h 25min
✈️ 20 flights a week

MUNICH (MUC)

🕒 1h 20min
✈️ 18 flights a week

COPENHAGEN (CPH)

🕒 1h 25min
✈️ 6 flights a week

WARSAW (WAW)

🕒 0h 55min
✈️ 30 flights a week

KYIV (IEW)

🕒 1h 50min
✈️ 2 flights a week

PUBLIC TRANSPORT



50 bus lines / 320 buses



20 tram lines / 281 trams



200 x electric scooters sharing



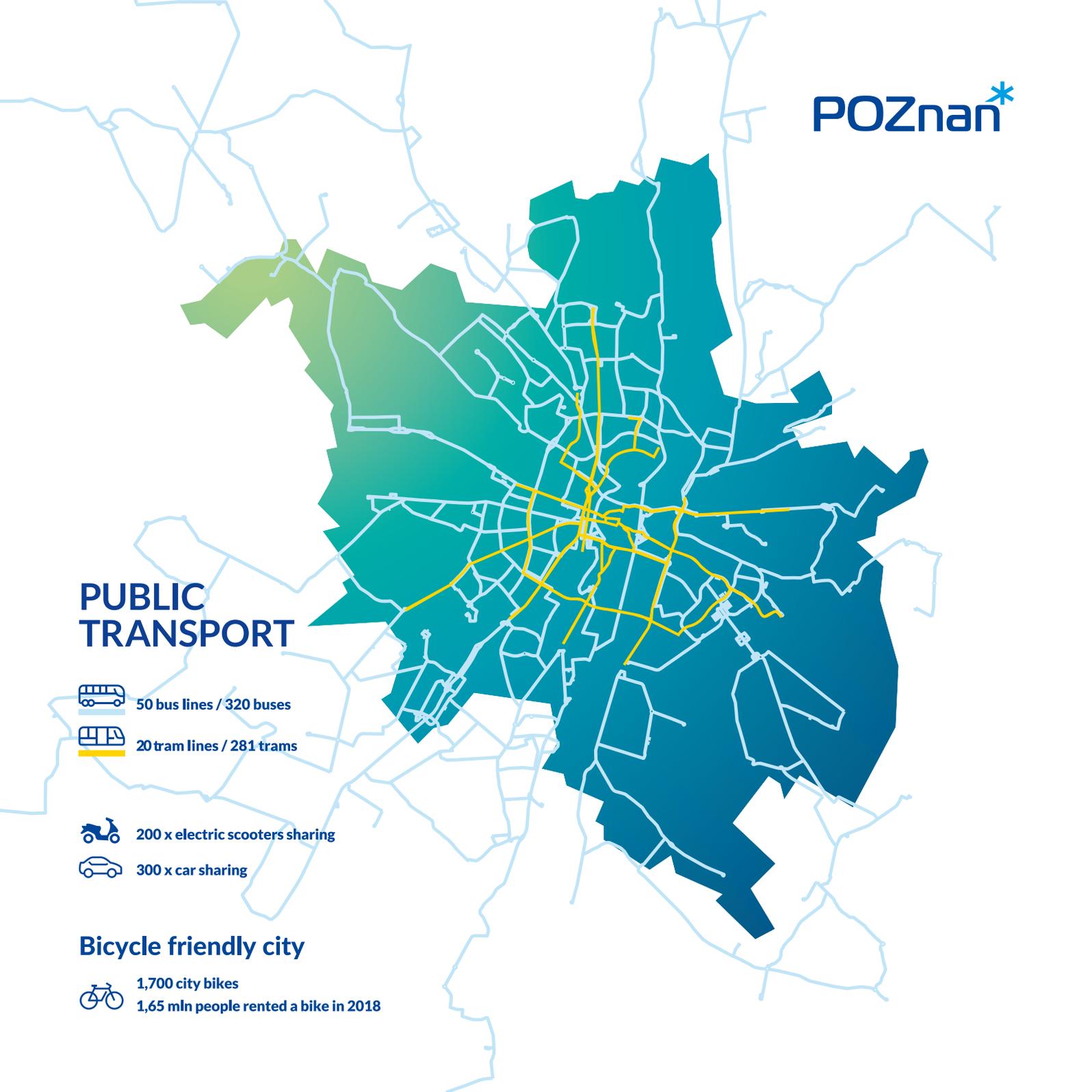
300 x car sharing

Bicycle friendly city



1,700 city bikes

1,65 mln people rented a bike in 2018



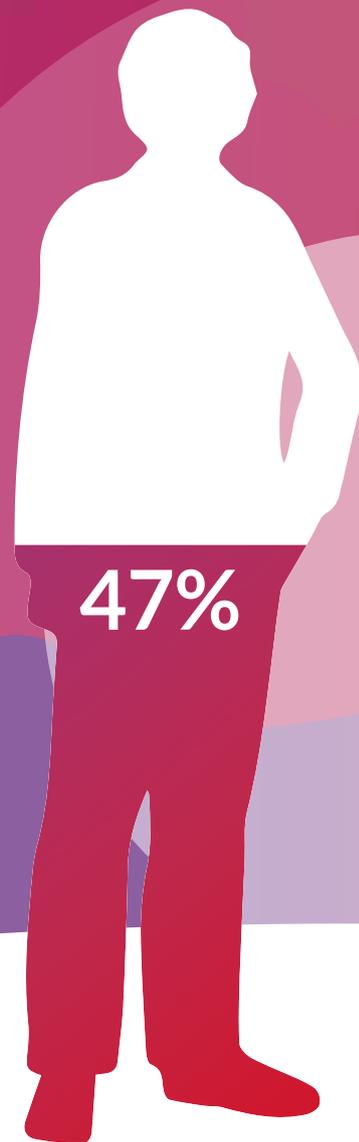


540,400
POPULATION

1,000,000
POPULATION OF POZNAN
AGGLOMERATION

2063.2
POPULATION PER 1 KM²

246,076
people employed in the enterprise
sector in companies of over 9 employees



47%

7,300 FOREIGNERS
FROM OVER 100 COUNTRIES*

87% from Europe, (including 13% from European Union countries)
4,400 foreign students

*Registered for stay longer than 3 months

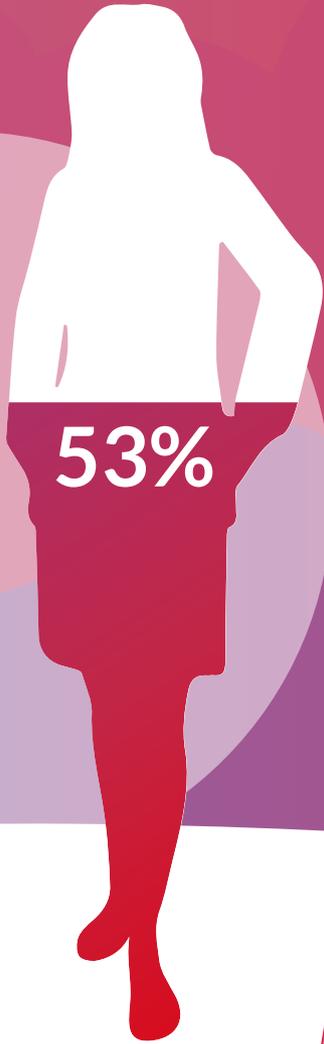


62% Ukrainians

6% Belarusians

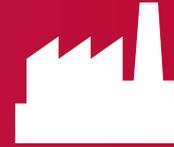
3% Germans

29% Other



111,700

BUSINESS ENTITIES OPERATING IN POZNAN



13,300 € – PER RESIDENT
FOREIGN DIRECT INVESTMENT

208 BUSINESS ENTITIES
PER 1,000 RESIDENTS

641 EMPLOYED PER 1,000 RESIDENTS

200 R&D ENTITIES

20-22% OF SALARY – TOTAL COST
OF EMPLOYMENT INCURRED BY EMPLOYER

1,1% UNEMPLOYMENT RATE

 1,200 €
AVERAGE MONTHLY SALARY

POZNAN REAL GDP
GROWTH RATE (2004 - 2018)
64%



BIG BRANDS

AMAZON, BRIDGESTONE, NIVEA,
SOLARIS, VOLKSWAGEN, WRIGLEY



Poznan International Fair
THE MOST RECOGNIZABLE CENTER
OF CONGRESSES AND CONFERENCES IN POLAND

80 events, 11,000 exhibitors, over 850,000 visitors annually

ACADEMIC 2018

 **19%**
BUSINESS
AND ADMINISTRATION
/ 21,000 STUDENTS

 **14%**
TECHNICAL
AND ENGINEERING
/ 16,200 STUDENTS

113,200
STUDENTS

55%
OTHER
/ 63,000 STUDENTS

 **8%**
MODERN LANGUAGES
/ 8,600 STUDENTS

 **4%**
INFORMATION
AND COMMUNICATIONS
TECHNOLOGIES
/ 4,400 STUDENTS

ENGLISH 2,400 students / 28%
GERMAN 740 students / 9%
RUSSIAN 600 students / 7%
ROMAN 330 students / 4%
SPANISH 330 students / 4%
KOREAN 220 students / 3%
JAPANESE 190 students / 2%
ITALIAN 170 students / 2%
SINOLOGY 160 students / 2%
OTHER 3,460 students / 39%



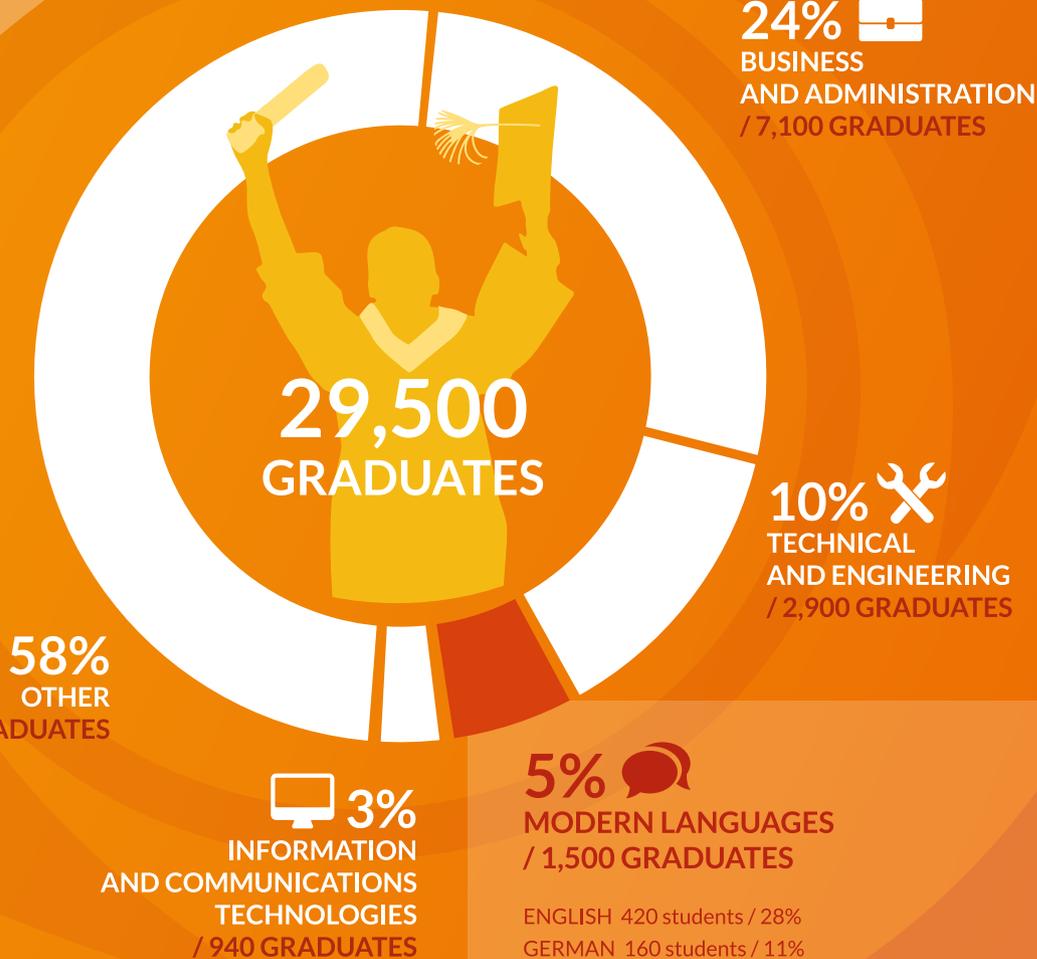
22

YEAR 2019



UNIVERSITIES IN POZNAN

Source: Central Statistical
Office of Poland data



5% MODERN LANGUAGES / 1,500 GRADUATES

ENGLISH 420 students / 28%
GERMAN 160 students / 11%
ROMAN 27 students / 2%
SPANISH 33 students / 2%
RUSSIAN 20 students / 1%
JAPANESE 19 students / 1%
SINOLOGY 18 students / 1%
KOREAN 1 students
ITALIAN 7 students
OTHER 795 students / 53%

BUSINESS SERVICES SECTOR

MORE THAN 90

BPO, SSC, IT and R&D centers in Poznan

9 BUSINESS SERVICES CENTERS

using at least 10 languages

ABOUT 18,000 EMPLOYEES

in BSS sector

Major growth in employment

18% ANNUALLY

9 NEW PROJECTS

in business services sector in 2019

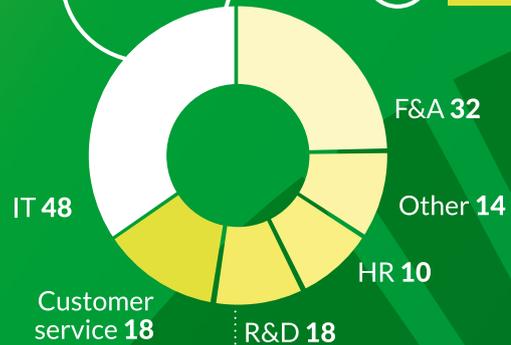
WHERE DO THE INVESTORS COME FROM?



ATTRITION RATE



NUMBER OF BSS CENTERS PROVIDING RESPECTIVE TYPES OF SERVICE



SUCCESS STORIES



is a global investment organization with offices in 34 countries around the world and offering investment solutions in more than 170 countries. We began our operations in Poznan in 2007 and have continued to expand, moving into our brand-new office at Nowy Rynek last year, which is at the heart of the city's rapidly growing business district. The space is designed to foster collaboration and includes conference rooms, game rooms, lounges an auditorium, rooftop terrace, canteen and an onsite childcare facility. Over the years we have grown to more than 1,000 people from various professional backgrounds and experiences – and are still growing. Franklin Templeton is proud to be part of Poznan's exciting growth story and we are always looking for more opportunities to further deepen our existing talent and capabilities, which will ultimately contribute to the city's ongoing development.



is a service provider exclusively for Volkswagen Group brands and companies throughout Europe. Established in April 2016 as an international competence centre for accounting, our main field of expertise, we provide accounting services in General Ledger, Accounts Receivable and Accounts Payable areas. We have also been successfully developing our service portfolio, expanding our scope of activities to IT services or document and data management. Currently Volkswagen Group Services sp. z o.o. hires nearly 300 employees and we are still growing. Located in the center of Poznan, near The Old Market Square, we create modern working environment, considering our clients and employees needs and expectations. Our company is oriented on excellence in service quality and expertise. Our mission is to be an attractive employer on a local market and international business partner of first choice.



aspires to be one of the world's most innovative, best performing and trusted healthcare companies. In Global Tech, we have a unique opportunity to bring industry-leading power, pace and scale to GSK's Strategic Priorities and deliver the benefits they will bring to our patients and customers. GSK's Tech Centre in Poznan works in a truly multinational environment supporting over 100,000 GSK employees from all business units, globally. We currently number about 700 highly-skilled tech professionals. We create modern workplace and we want to make sure that everyone is empowered to be themselves, feel good and keep growing. We encourage experimentation and collaboration across teams to bring innovation to our jobs and we learn from our failures and celebrate our successes together.



is a Global Award-Winning software development company and is the leader in NGDC+ [Next Generation Delivery Center] that builds and manages delivery centers in the areas of ITO and BPO. FlexDev works with major organizations and is a trusted advisor to some of the World largest and most respected brands. FlexDev manages local centers by providing full management, administration, legal support, marketing and finance while their clients have full control and ownership of their assets. FlexDev's main operation is in Poznan [Poland] but also has operations in the UK [London] and the USA [Boston]. FlexDev chose Poznan for it's location and proximity to the UK and Berlin, it's excellent resources, top academic centres and environmentally friendly approach, and the over all quality of life. FlexDev aims to attract and support large US based fortune 500 companies and assist them with future-proofing their business by building them Next Generation Delivery Centers in Poland.



Beiersdorf Manufacturing Poznań is a part of Beiersdorf Group attracting around 500 employees from production, technology and specialist roles. The company was set up in Poznań in 1929. Throughout our history we have built trust by staying close to our consumers and developing innovative skin care brands that are tailored to their needs. In 2009 the site was extended to became one of the global producers of NIVEA and Eucerin cosmetics. Our passion for skin care is what drives us and makes us unique. Our brands and skin care products are trusted by consumers – both locally and regionally. Over 90% of our products is exported to over 30 countries around the world. Facility produces 210 mln pieces of different packing formats on 11 different production lines: bottles/dispensers/jars and tubes. Due to market growth and number of innovations being implemented, site is going to be expanded in upcoming years.

SELECTED BSS CENTERS



A. Schulman	SSC	English, German, total 11 languages
ADM	SSC	English, German, Bulgarian, Dutch, Turkish
Majorel Polska	BPO	German, English, Russian
Bridgestone EBS	SSC	English, German, Danish, Dutch, French, Hungarian, Italian, Spanish
Carl Zeiss	SSC	English, German, Czech, Danish, French, Italian, Spanish, Swedish
Carlsberg Shared Services Centre	SSC	English, German, Danish, Norwegian, Swedish, Polish
Conectys	BPO	Polish, German, English, Russian
Contact Center	BPO	English, German, Czech, French, Greek, Italian, Russian, Spanish, Ukrainian, others
DFDS	SSC	English, Danish, Italian, Swedish
Duni EFF	SSC	English, German, Czech, Danish, Finnish, Flemish, French, Italian, Spanish, Swedish, Russian, Polish
EXIDE Technologies	SSC	English, German, French, Nordic languages, Portuguese, Spanish
Franklin Templeton	SSC	English, German
Grant Thornton	BPO	English, Polish
GSK Finance Hub	SSC	English
Ikea Business Service Center	SSC	English, German, Czech, Danish, Dutch, French, Finnish, Hungarian, Italian, Portuguese, Slovak, Spanish, Swedish, Russian, Polish
John Deere	SSC	English
Jeronimo Martins Polska	SSC	English, Polish
Lorenz Snack-World Services	SSC	English, German, Arabic, Polish
MAN Accounting Center	SSC	English, German, French, Italian, Spanish, Turkish, Polish
Mars Financial Services	SSC	English, German, Arabic, French, Hungarian, Russian, Spanish, Polish
McKinsey EMEA Shared Services	SSC	English, German, Dutch, French, Italian, Nordic languages, Spanish, Russian
Mexichem Shared Services Europe	SSC	English, German, Dutch, French, Hungarian, Italian, Russian, Polish, others
Newell Poland Services	SSC	19 languages
O-I Business Service Center	SSC	English
Osram	SSC	English, German
Raben Management Services	SSC	English, German, Dutch
Rehau	SSC	English, German, French, Serbian, Polish
Roche Polska	SSC	English, Polish
Rockwool	SSC	English, German, Danish, Dutch, French
Starter	BPO	English, German, Polish,
Volkswagen Group Services	SSC	English, German, Portuguese, Slovak, Spanish





SELECTED BSS CENTERS

Allegro	IT	English, Polish
BAE Systems Poland	IT	English
Capgemini Software Solution Center	IT R&D	English, German
CenturyLink	ITO	English, German, French, Italian, Spanish, Polish
Cognifide	IT	English, Polish
Computacenter	IT	English, German
Egnyte	R&D	English, Polish
Etteplan	R&D IT	English, Polish
Fabres	ITO/SSC	English, German, Danish, Norwegian, Russian, Swedish, Ukrainian
Fandom powered by Wikia	R&D	English
GFT Poland	IT	English
GSK Tech Centre	IT	English
Hicron	ITO	English, German, Polish
Huawei	R&D	English
Intitek	BPO/ITO	English, German, French, Polish
itelligence	ITO	English, German, Russian, Spanish
IT Kontrakt	ITO	English, German, Czech, Portugese, Russian, Spanish, Ukrainian, Polish
Netguru	IT	English
Next IT powered by Flex Dev	IT	English
Nordcloud	R&D IT	English
Payworks	IT	English
Polaris Laboratories	R&D	English, Polish
Seargin	ITO	English, German, Polish
Selvita	R&D	English, Polish
Sii	ITO	English, French
SNP Poland (formerly BCC)	ITO	English, German
Sollers Consulting	IT	German, Polish
Sonalake	IT	English, Polish,
TomTom	R&D IT	English, Polish
Transitions Technologies	IT	English, Polish
VentureDevs	IT	English, Polish
Unilever Polska	R&D	English, Polish



OFFICE SPACE

POZNAN Q3 2019

555,100 m² 79,200 m²	total modern office stock under construction	25,800 m²	gross demand Q1-Q3 2019
11,40%	vacancy rate	63,100 m²	vacant space
13,25-15,75 €	prime headline rents in Poznan	78,500 m²	new supply Q1-Q3 2019
36,000 m²	projected pipeline 2020	38%	of occupancy of newly delivered office projects in 2019
38%	share of companies from the business services sector Q1-Q3 2019	6,5%	prime office yields Q1 – Q3 2019
95	number of existing modern office buildings	88,5 million €	office investment volume Q1-Q3 2019

Nowy Rynek D
35,830 m²

Address:
Matyi

Estimated delivery
date: 2021

Giant Office
18,000 m²

Address:
Górki/Głogowska

Estimated delivery
date: 2020

**Zajezdnia
Poznań**
7,200 m²

Address:
Henryka Sienkiewicza

Estimated delivery
date: 2021

GB Office
3,100 m²

Address:
Gdyńska

Estimated delivery
date: 2020



Under construction

Poznan office market



Modern office buildings

555,100 m²
OFFICE SPACE



Pixel II
10,600 m²

Address:
Grunwaldzka
Estimated delivery
date: 2021

Pixel III
10,600 m²

Address:
Grunwaldzka
Estimated delivery
date: 2022



Planned projects

Source: Colliers, 2020

200 STARTUPS OPERATE IN POZNAN

CITY CO-WORKING SPACE "+ JEDEN"

Available for everybody, everyday for free.

CITY DEVELOPMENT STRATEGY 2020+

The city supports the startup environment and engages in events and initiatives aimed at initiating and developing young companies.

STARTUP POZNAŃ PROJECT

A joint initiative for the development of the local startup ecosystem.

STARTUP EVENTS IN POZNAN:

HIVE61

meet.js

Agile Poznan

Blockchain

Laravel meetup

JUG Poznan

Startup Community Poznan

Geek Girls Carrots

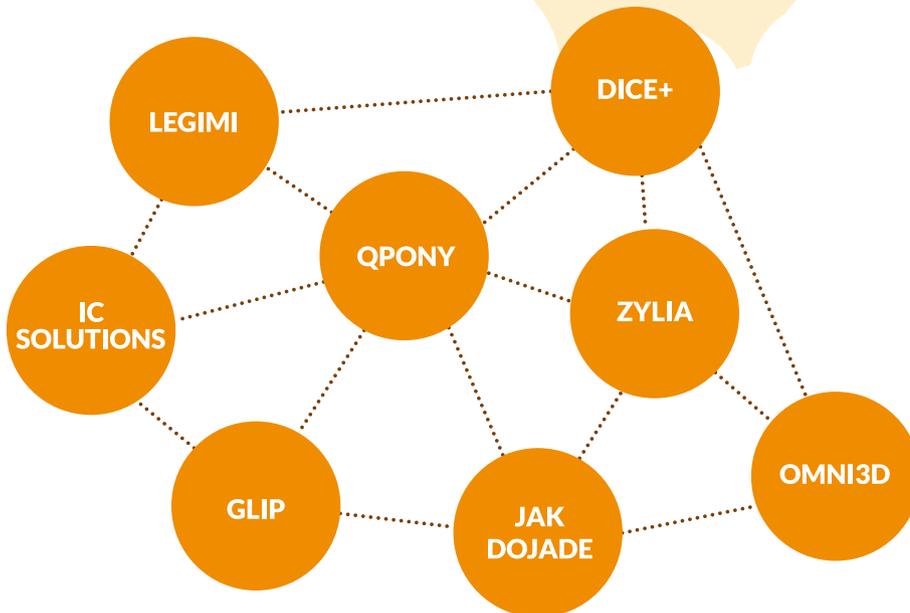
Startup Poland Camp

Ptaq

Serverless Poznań meetup

JavaScript do zadań specjalnych

Startup companies with international success:



SMART CITY

6 SCIENCE AND TECHNOLOGY PARKS IN POZNAN

- Poznan Technology Industrial Park (city ownership)
- Poznan Science and Technology Park Adam Mickiewicz University Foundation
- Wielkopolska Centre for Advanced Technologies
- Eureka Technology Park
- Nobel Tower Centre for Advanced Technologies
- YouNick Technology Park



Electric buses

already 21 electric city buses from Poznan company Solaris



SMART CITY SOLUTIONS IN POZNAN

The city's mobile app helps residents and visitors improve their neighborhoods and report non-emergency issues.



Air quality monitoring drones



Easy access to open mobility data



Carsharing, e-scooters

moving around the city with the care for the environment.



Poznan 3D Model

providing Poznan residents, investors and officials with easy access to spatial data



The website and app providing access to outdoor air quality data (Atmosfera dla Poznania)



GAMEDEV

EU PROJECT

“LET’S PLAY IN WIELKOPOLSKA”

SUPPORT FOR GAMEDEV STUDIOS

EURO 500,000 BUDGET FOR PROMOTION AT INTERNATIONAL CONFERENCES AND FAIRS IN EUROPE AND US

APPROXIMATELY

30



GAME
DEVELOPMENT
STUDIOS
THAT
MADE
ABOUT

150

GAMES
TO THIS DAY



10
STUDIOS



1 BIG STAND
FOR POZNAN
AND WIELKOPOLSKA
GAME DEVELOPERS



CATALOGUE
PRESENTING
GAMEDEV
COMMUNITY
FROM POZNAN



3
EVENTS



THE BIGGEST GAMING
EVENT IN CEE

79,000
visitors

220
exhibitors

1,500
game
stations



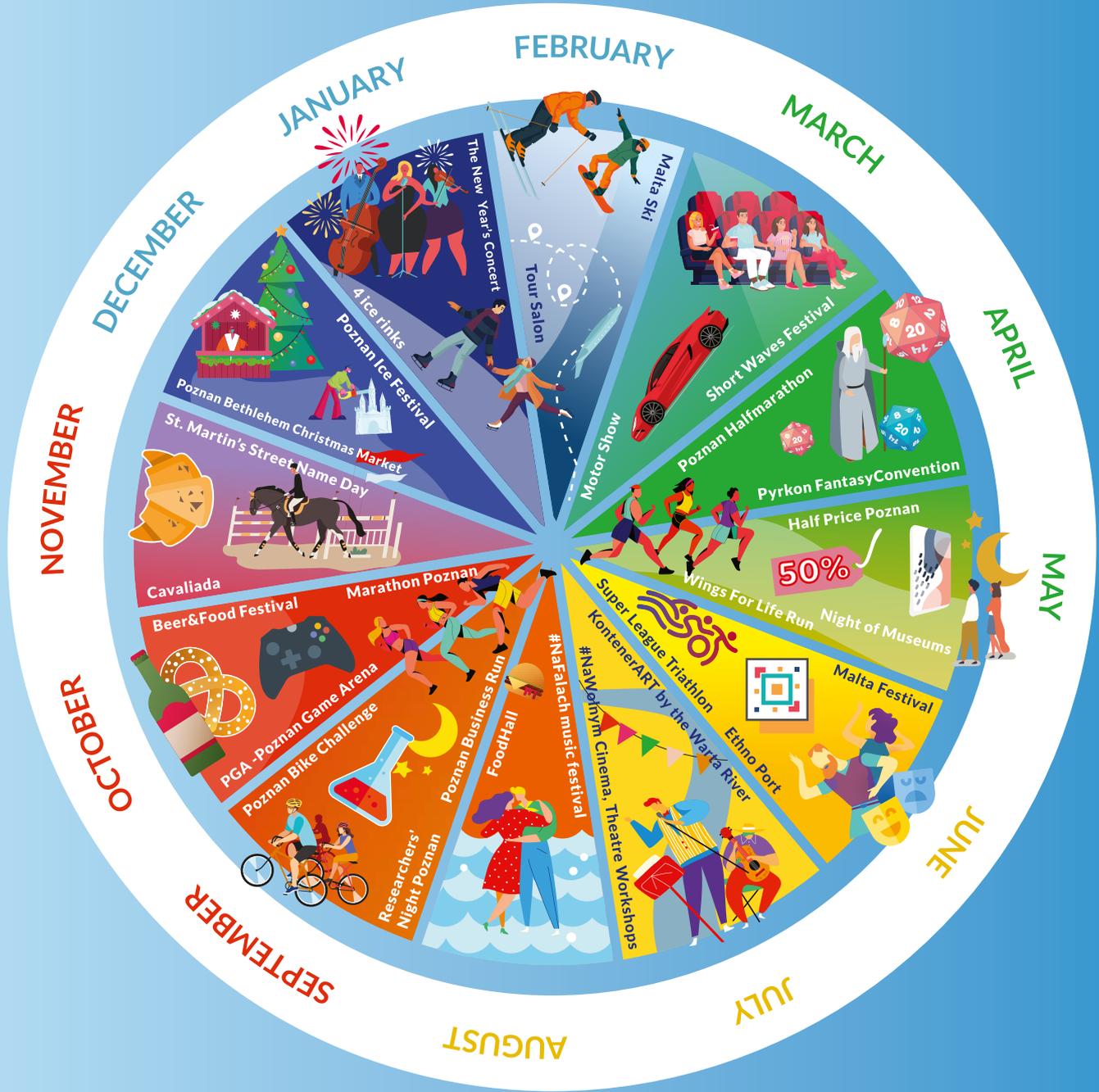
GAME INDUSTRY CONFERENCE
WITH MORE THAN

3,600
attendees

640
companies

160
talks

SOCIAL LIFE



GREEN CITY

Green area per resident: 151 m²

4 lakes within the city limits: Maltańskie, Kierskie, Rusałka, Strzeszynek

Warta Riverside regeneration – cycle path and city beaches



ENTERTAINMENT AND CULTURE

- 13 CINEMAS
- 29 MUSEUMS
- 23 THEATERS
- 40 ART GALLERIES
- 10 STADIUMS
- 138 TENNIS COURTS
- 14 INDOOR SWIMMING POOLS
- 503 SPORTS FIELDS
- 1 CAR TRACK



FOOD & DRINK

- 500 RESTAURANTS AND BARS
- 34 RESTAURANTS IN GAULT & MILLAU CULINARY GUIDE 2019
- 2 TOP CHEF RESTAURANTS



HOTELS

- 3 ★★★★★
- 16 ★★★★
- 37 ★★★
- 13 ★★
- 2 ★
- 11 HOTELS WITH NO CATEGORY
- 319 FACILITIES WITH CONFERENCE ROOMS

TOURIST ATTRACTIONS



Kaiser's Castle
huge neo-Romanesque building,
which now serves as a cultural
centre "Zamek" (exhibitions,
cinema, theatre, concerts)



Bałtyk
the most awarded modern
office building with unique
architecture



**Stary Browar
(The Old Brewery)**
the best shopping center
in Europe



City Stadium
Lech Poznan stadium,
which hosted Euro 2012



Post-Jesuit College
stunning building dating back
to the first half of the 18th
century, now the Poznan City Hall



The Old Town & Town Hall



Poznan Croissant Museum
the most delicious museum
in Poznan

**Maltańskie Lake
(WakePark Malta)**



Cathedral Island

Porta Posnania
museum that tells a story
of the Cathedral Island

COMPREHENSIVE INVESTOR SUPPORT

1 CHOICE OF INVESTMENT LOCATION

PROJECT MANAGER

A person dedicated to the project

Assistance throughout the investment preparation and implementation process

DATA ANALYSIS

Labour market, number of students and graduates, unemployment rate, foreign languages proficiency

Available office and storage premises

Answering other questions from the investor

INVESTOR VISIT

Individually tailored visit programme

Meetings with the city authorities, university, real estate and HR industry representatives

Tour around the city and potential investment locations

2 PREPARATION FOR STARTING BUSINESS

PREPARATION OF THE INVESTMENT

Gathering real estate offers meeting investor requirements

Support in obtaining necessary administrative decisions

Providing conference rooms for recruitment and training needs

Assistance in obtaining state grants

EMPLOYER BRANDING

Creating a positive image of the investor as an employer

Bespoke solutions in order to recruit the best employees

3 AFTERCARE SUPPORT IN ON-GOING ACTIVITIES

FINANCIAL

Scholarships for student internships at Poznan-based companies

INTANGIBLES

Engaging investors in CSR activities organised by the City of Poznan

Other support services, in response to investors needs





Poznan Business Run

Charity run organized by and for business operating within the area of Poznan.



BPO/SSC Week

Workshops for high school students on recruitment and on the work of business service centers provided by BPO/SSC sector representatives.



Scholarships

Scholarships may be granted to Poznan university students who are accepted for an internship at a company in Poznan.



German language promotion

City of Poznan motivates young people to learn German language.



POZITIVE TECHNOLOGIES

Conference for IT sector coorganized by the City of Poznan and IT companies from Poznan.

POZNAN INITIATIVES



POZnan*

Investor Relations Department
City of Poznan



City of Poznan
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