



Business Services in Bydgoszcz





Report prepared for Miasto Bydgoszcz
by the Association of Business Service Leaders (ABS L)

in cooperation with JLL and Randstad



Project coordinator:

Janusz Górecki, Head of Sector Research & Analytics, ABS L

www.absl.pl



Investors support in Bydgoszcz:

Bydgoszcz Regional Development Agency Sp. z o.o.

ul. Unii Lubelskiej 4C, 85-059 Bydgoszcz

+48 52 585 88 23

barr@barr.pl

barr.pl

Layout and printing:

www.ponad.pl The logo for Ponad, featuring a stylized blue "P" icon followed by the word "Ponad" in a blue sans-serif font.

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1

Why Bydgoszcz?

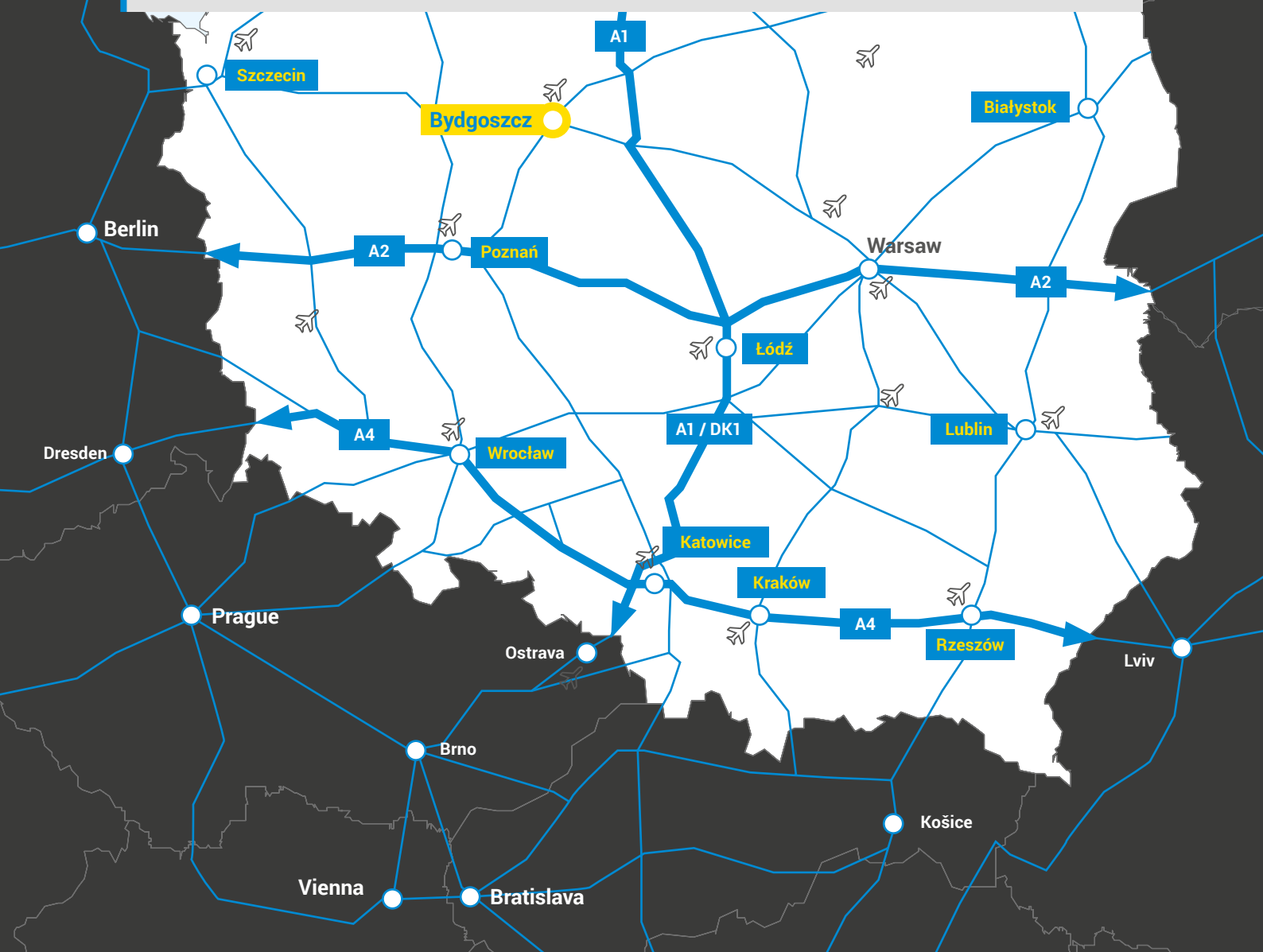
Bydgoszcz is the eighth largest city in Poland (over 350,000 inhabitants), the administrative capital of the Kujawsko-Pomorskie Voivodeship. Together with Toruń, it forms the Bydgoszcz-Toruń agglomeration, inhabited by nearly 800,000 people. The city is a leader of a dynamically developing region, performing numerous social and economic functions. Significant advantages of the city, translating into its attractiveness for investors from the business services sector, are the transport location and high quality of human capital. Bydgoszcz is a city with a huge potential, pursuing a strategy designed to ensure that it is equally friendly to residents and entrepreneurs.



Photo: Robert Sawicki

FIGURE 1

LOCATION OF BYDGOSZCZ AND DISTANCES TO SELECTED CITIES



Source: ABSL own study

	Distance	Travel time by car	Travel time by rail
Poznań	140 km	1h 50min	1h 35min
Gdańsk	167 km	1h 55min	1h 45min
Warsaw	300 km	2h 50min	3h 35min
Szczecin	257 km	3h 40min	4h 42min
Berlin	400 km	4h 00min	5h 20min

Source: ABSL own study based on Google Maps data

According to the TomTom Traffic Index ranking, Bydgoszcz is characterized by a low street congestion rate compared to the largest cities in Poland.

Source: www.tomtom.com/en_gb/trafficindex

Why choose Bydgoszcz?



FIGURE 2

AIR TRANSPORT – BYDGOSZCZ AIRPORT (BZG)



Distance of the airport to the city center

5 km



Number of countries served (regular scheduled flights)

4



Number of destinations (regular scheduled flights)

9



Total passenger traffic

337,600 (2017)
400,000+ (forecast for 2018)



Airlines flying regular schedule flights

LOT Polish Airlines, Lufthansa, Ryanair



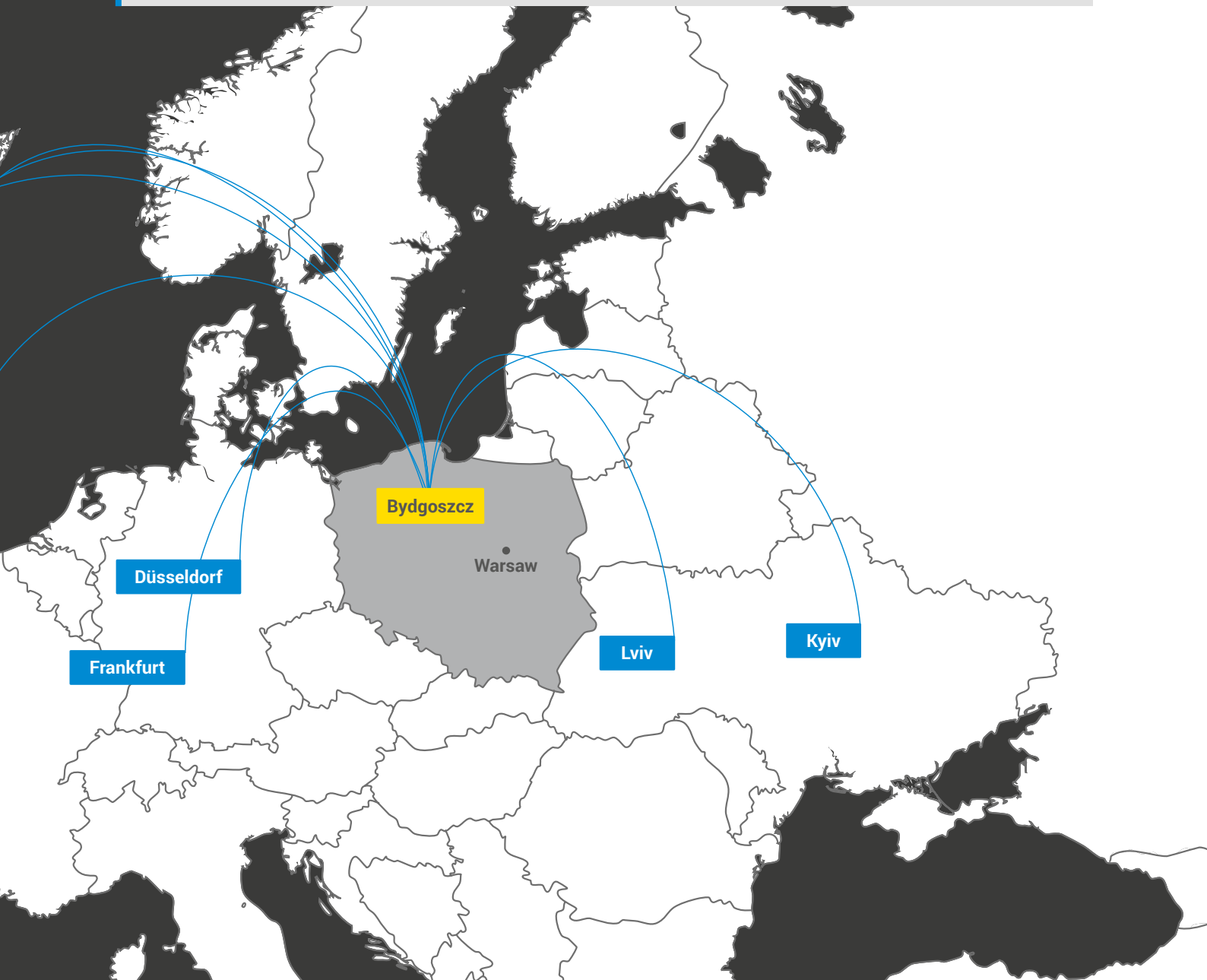
Number of direct flights operated per week to selected destinations:

Londyn (LTN, STN): 11 in all
Frankfurt am Main (FRA): 7
Dublin (DUB): 2

Source: ABSL own study based on www.plb.pl and Google Flights

FIGURE 3

MAP OF REGULAR FLIGHTS FROM BYDGOSZCZ



The Ignacy Jan Paderewski Bydgoszcz International Airport (BZG) serves several important business destinations, including daily flights to Frankfurt (FRA). The airport is located at a very convenient distance from the city center. The journey takes approximately ten minutes. In less than two hours, one can reach Bydgoszcz from two international airports in Gdańsk (GDA) and Poznań (POZ). The journey to the largest airport of the country, Warsaw Chopin Airport (WAW), takes less than three hours.

2

Business services

Bydgoszcz is among the most important investment locations in the business services sector in Poland. In terms of employment in BPO, SSC, IT and R&D centers, it ranks eighth in the country and is dynamically developing. The increasing number of jobs in the sector (28% since Q1 of 2016) is supported by successful cooperation of investors with the commercial real estate industry, recruitment companies, local authorities, universities and other business environment institutions. Bydgoszcz perfectly exploits the opportunities related to the development of the sector, in particular broadly understood IT services, increasingly emphasizing its presence on the national map of business services.



Photo: Shutterstock

FIGURE 4

FEATURES OF BYDGOSZCZ ATTESTING TO THE ATTRACTIVENESS OF THE CITY AS A BUSINESS SERVICES CENTER



City specialization: IT services

One of the most characteristic features of Bydgoszcz as a business services location is its specialization in the field of IT. Among the 11 largest business services locations in Poland, Bydgoszcz is ranked first, taking into account the share of IT services in the employment structure of its BPO, SSC, IT and R&D centers.



Competitive level of labor market pressure

The share of people working in BPO, SSC, IT, R&D centers in the population in the mobile working age (18-44 years) in Bydgoszcz is 7%. This proves that the pressure in the local labor market is lower than in most of the major business services locations in Poland.



Attracting destination for commuters from the region

The proximity of Toruń (approximately one hour by car) positively affects the supply of qualified employees in the local labor market. Many employees of the services centers in Bydgoszcz commute from that town.



Fast-developing office market

Approximately 30% of the office space in the city has been commissioned in the last three years. This confirms the rapid development of the office market and means that a large part of the office space in the city is located in modern buildings.



Success stories of BPO, SSC, IT, R&D centers

In the opinion of the most important investors in the city, Bydgoszcz is a proven business location. Most business services centers have expanded the scope and level of their operations over the last three years, accompanied by a significant increase in employment in companies.



Cost competitiveness

The city is characterized by lower operating costs compared with the largest business services locations in Poland. What is more, in the "European Cities and Regions of the Future 2018/19" ranking (fDi Intelligence, Financial Times), Bydgoszcz ranked seventh in Europe in terms of cost effectiveness in the category of "Medium European Cities of the Future".



Economic strategy

Consistent implementation of the policy of supporting investors and entrepreneurs is the basis for the dynamic development of the city as one of the leading regional economic centers in Poland. It is worth adding that Bydgoszcz has been chosen as the best city for investment according to an independent World Bank report entitled "Doing Business In Poland 2015".



Support for investors

In Bydgoszcz, the comprehensive support for investors is handled by the Bydgoszcz Regional Development Agency – an institution of the business environment established in 2013. The dedicated team provides support during the investment process and professional post-investment support. More information can be found in the "Investor Support" chapter.

FIGURE 5

BUSINESS SERVICES SECTOR IN BYDGOSZCZ – KEY INFORMATION

**9,500**

Number of employees working in BPO, SSC, IT and R&D centers in Bydgoszcz providing services in foreign languages (as of Q1 2018). Together with centers that provide services exclusively in the Polish language to customers located in Poland, employment is over 10,000 persons.

**41**

Number of BPO, SSC, IT and R&D service centers in Bydgoszcz (Q1 2018), of which 44% are foreign entities.

**9**

The number of countries in which companies with their business services centers in Bydgoszcz have their head offices (Poland, United Kingdom, Germany, Sweden, USA, France, Finland, The Netherlands, Canada).

**28%**

Employment growth in the services centers in Bydgoszcz between Q1 2016 and Q1 2018 (just over 2,000 persons in total). The vast majority of newly created jobs in this period were generated by centers previously existing in the city, which developed their activity.

**9**

Number of business services centers established since the beginning of 2016. Plans of companies regarding employment in these investment projects assumed the creation of over 500 new jobs, of which more than half have already been generated.

**IT**

The most important category of services provided at the centers in Bydgoszcz are IT services (including research and development activities in the field of software development). They generate 86% of employment in the industry and are part of the dominant business profile of most centers in the city.

**12,000**

























The number of employees in BPO, SSC, IT, R&D centers providing services in foreign languages projected for 2020 (according to the conservative scenario).

**>50**















The number of BPO, SSC, IT, R&D service centers operating in Bydgoszcz, forecast for 2020 (according to the conservative scenario).

TABLE 1

BUSINESS SERVICES CENTERS IN BYDGOSZCZ

Name of company	Type of center	Year activities began	Location of parent company headquarters	Employment level	Profile of main activities
Atos	IT	2004		>3,500	IT services, among others, Managed Services (MS) and Big Data and Security (BDS)
Nokia	IT	2016 (earlier Alcatel-Lucent)		1,000-1,500	A global center for technological support, professional services and research and development in the field of advanced telecommunications solutions
iQor	IT	2005		1,000-1,500	BPO, customer support and data analysis services
SDL	IT	2012		250-500	Technical support services for localization processes, content management services
Teleplan	IT	2001		250-500	Technical support services for customers in the electronics sector
PZU	SSC	2013		250-500	Customer contact center
Oponeo	SSC	2001		250-500	Customer contact center
PKP Cargo	SSC	2001		250-500	Financial-accounting services
Asseco	IT	1993		100-250	Software development
Teldat	IT	1996		100-250	Software development, technical support services
Mobica	IT	2011		100-250	Software development
Bazy i Systemy Bankowe	IT	1994		100-250	Software development, IT outsourcing
Asseco Data Systems	IT	1966		100-250	Software development
Great Call	BPO	2017		100-250	Customer contact center
Oponeo Brandhouse	SSC	2010		100-250	Customer contact center
Vivid Games	IT	2012		100-250	Software development
Livingston International	BPO	2002		<100	Import, export processes and customs classification of goods services
T Komp	IT	2009		<100	Software development
Sunrise System	IT	2011		<100	Software development
Logon	IT	1992		<100	Software development
Unicall	BPO	2013		<100	Customer contact center
Galactica	IT	2005		<100	Software development
Soft Blue	IT	2012		<100	Software development
PGE Systemy	IT	2017		<100	ITC support services

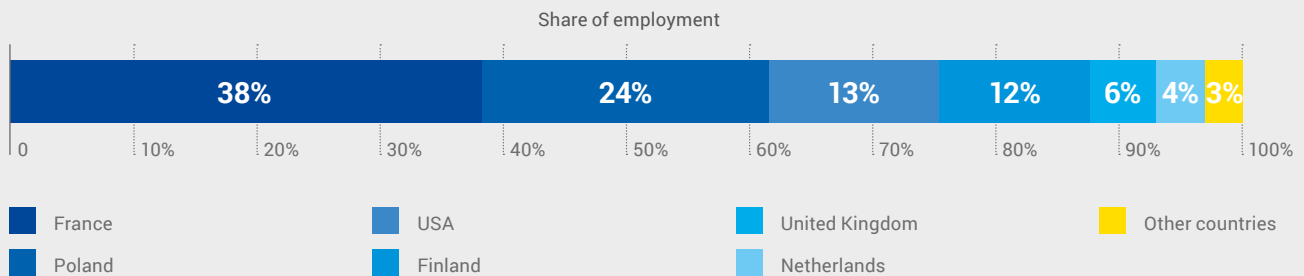
Business services

Name of company	Type of center	Year activities began	Location of parent company headquarters	Employment level	Profile of main activities
Postdata	IT	2002		<100	Software development
Cybercom	IT	2016		<100	Software development
Frosta	SSC	2018		<100	Financial-accounting services, customer contact services, IT services
Eximo Project	IT	2010		<100	Software development
Cognifide	IT	2018		<100	Software development
Quad/Graphics	IT	2016		<100	Software development
SNP Poland	IT	2018		<100	Software development
MSG Media	IT	1997		<100	Software development
SuperControl	IT	2015		<100	Software development
UniDOC	IT	2011		<100	Software development
Bonair	IT	2013		<100	Software development
Ericsson	IT	2015		<100	ICT services
Syneo	IT	1995		<100	Software development
Terra Computer	IT	2015		<100	Software development

Source: ABSL own study

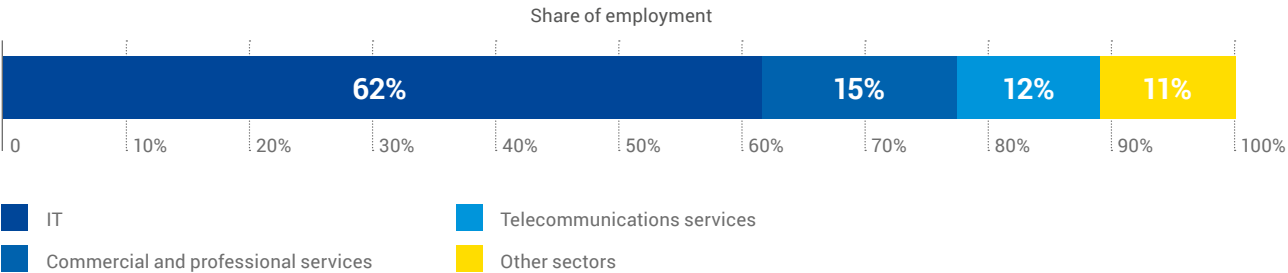
FIGURE 6

EMPLOYMENT STRUCTURE AT SERVICES CENTERS IN BYDGOSZCZ BY THE LOCATION OF THE HEADQUARTERS OF THE PARENT COMPANY



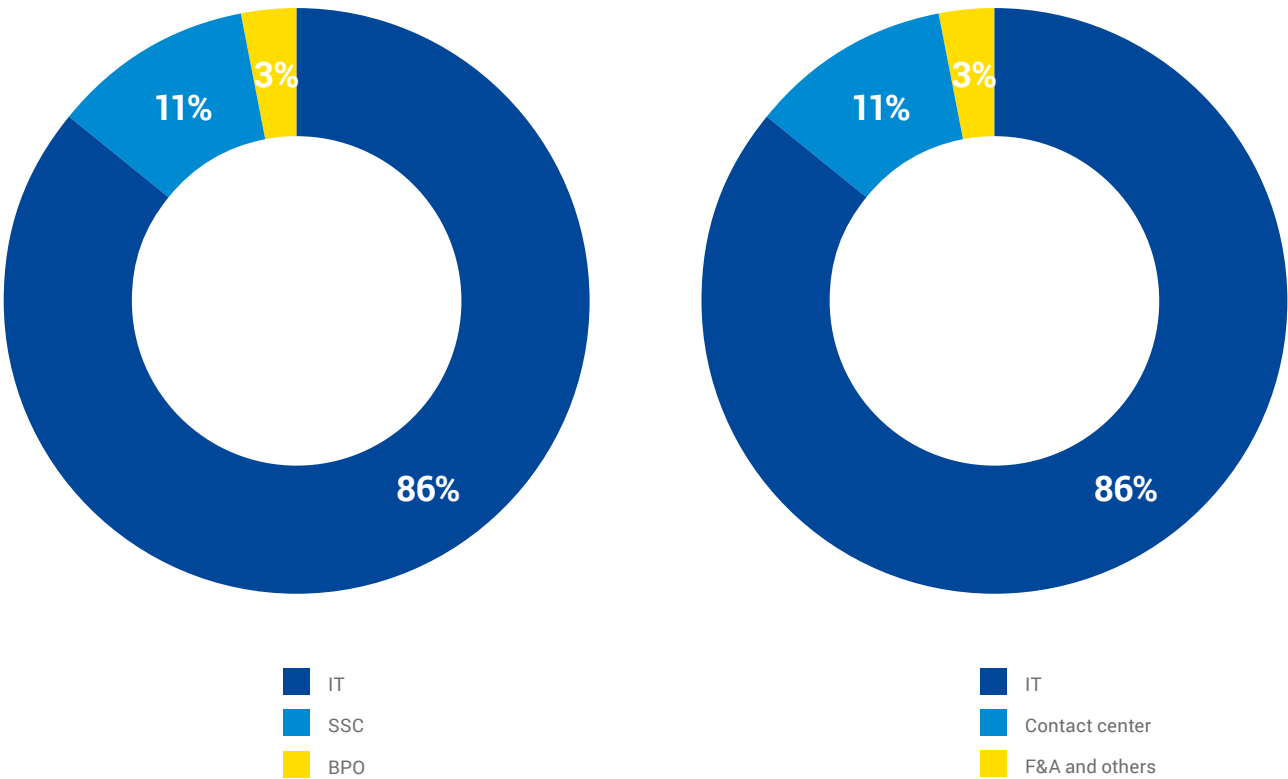
Source: ABSL own study

FIGURE 7
EMPLOYMENT STRUCTURE AT SERVICES CENTERS IN BYDGOSZCZ BY THE SECTORS OF THEIR PARENT COMPANIES



Source: ABSL own study

FIGURE 8
EMPLOYMENT STRUCTURE AT SERVICES CENTERS IN BYDGOSZCZ BY TYPE OF SERVICES CENTER AND CATEGORIES OF PROCESSES HANDLED



Source: ABSL own study

Business services

FIGURE 9

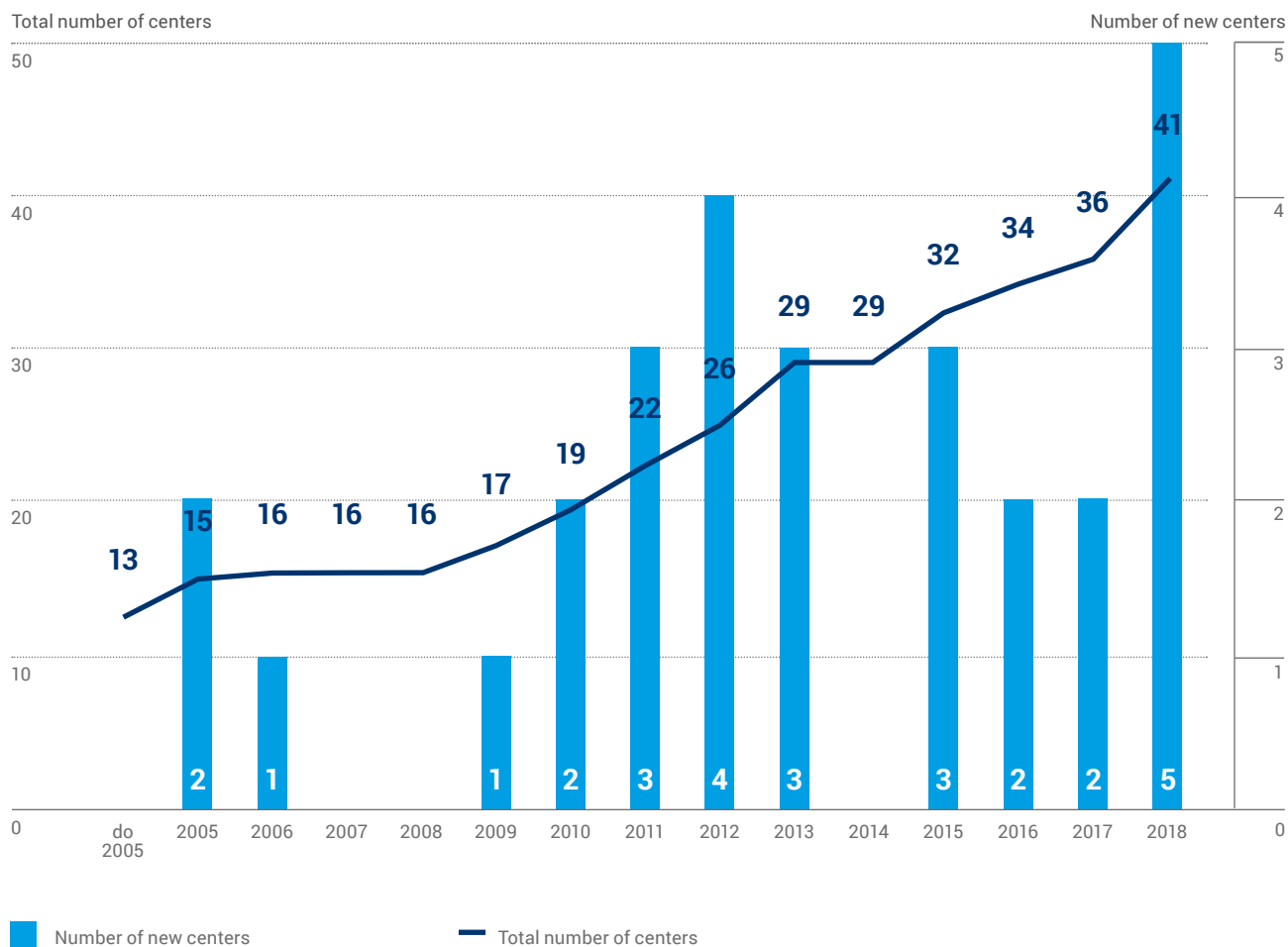
MAIN LANGUAGES USED IN THE SERVICES CENTERS LOCATED IN BYDGOSZCZ



Source: ABSL own study

FIGURE 10

SERVICES CENTERS IN BYDGOSZCZ BY THE YEAR OF ACTIVITY COMMENCEMENT



Source: ABSL own study

TABLE 2

EXAMPLES OF COOPERATION BETWEEN SERVICES CENTERS AND UNIVERSITIES AND SCHOOLS
IN THE BYDGOSZCZ-TORUŃ AGGLOMERATION

Company	Examples of cooperation
Atos	<ul style="list-style-type: none"> » Wide cooperation with leading universities in the Kujawsko-Pomorskie Voivodeship. » The "Atos Academy" program: training courses for students of last years of studies and graduates with junior professional experience. Free classes are taught on weekends by experienced Atos engineers. » Cooperation with the WSB University in Bydgoszcz: a partner of the faculties of Management and Information Technology and postgraduate studies in the fields of Project Management and Advanced Program and Project Management. » The Atos Excellence program: a series of IT and language courses for senior high school students. » Cooperation with the 2nd Senior High School in Bydgoszcz: partner class with a Math-IT profile with extended tuition in two foreign languages.
iQor	<ul style="list-style-type: none"> » Cooperation with numerous high schools and universities in the Kujawsko-Pomorskie Voivodeship, including the Schools of Electronics in Bydgoszcz, which offers a patronage "iQor Class". » The "iQor Team" ["Drużyna iQora"] project: internships and work practice in the company (several hundred per year), implemented in cooperation with secondary and higher schools in the region. Supporting the education process with practical elements use in the company. Scholarships for the best interns and trainees. » Cooperation with the WSB University in Bydgoszcz: partner of the faculties of Logistics, IT in Business, Management Engineering and post-graduate studies in the field of HRM for managers. "iQor aQademy" – a series of free workshops in the field of communication.
Nokia	<ul style="list-style-type: none"> » Cooperation with the University of Technology and Life Sciences in Bydgoszcz: a jointly developed curriculum in the field of Teleinformatics. Work practice, seminars and training courses for students. » Cooperation with the WSB University in Bydgoszcz: partner of the IT Studies. » Cooperation with the 8th Senior High School in Bydgoszcz: participation in the development of the curriculum, programming workshops for students.
SDL	<ul style="list-style-type: none"> » Cooperation with the Institute of Modern Languages and Applied Linguistics at the Kazimierz Wielki University: organization of translation practices. » Cooperation with the Kujawy and Pomorze University in Bydgoszcz: organization of exercises for students of English Philology.

Source: ABSL own study based on the websites of companies and schools

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Investors about themselves

Among more than 40 companies that have opened their service centers in Bydgoszcz, there are globally recognizable brands, leaders of their industries. The city also hosts numerous centers of leading Polish IT service providers. It is worth noting that the majority of investors present in Bydgoszcz expanded their range of services in recent years and increased employment in their centers. This chapter presents selected investment success stories that describe the activities of Bydgoszcz centers and presents plans for the coming years.



Photo: Robert Sawicki



Atos is a global leader in digital transformation with approximately 100,000 employees in 73 countries. European number one in Big Data, Cybersecurity, High Performance Computing and Digital Workplace, the Group provides Cloud services, Infrastructure & Data Management, Business & Platform solutions, as well as transactional services through Worldline, the European leader in the payment industry. The Group is the Worldwide Information Technology Partner for the Olympic & Paralympic Games. Atos has operated in Poland since 2000. The Group employs above 5 000 people in its locations in Bydgoszcz, Warsaw, Wrocław, Gdańsk, Łódź, Toruń, Kraków, Opole and Rzeszów. Our heart is beating in Bydgoszcz – the biggest office in Poland, where the services are delivered from two divisions: Infrastructure and Data Management (IDM) and Big Data and Security (BDS). Because of comprehensive range of IT services, we realize strategic projects for global clients.

The origins of Atos in Poland date back to 2000 – at that time 6 people worked in Bydgoszcz. Currently, the Atos team from Bydgoszcz consist of 3,500 people. By the end of 2018, we plan to employ over 500 people. We are looking for IT specialists and people with foreign language skills, in particular English, German and French. – says Anna Data-Hendler, Recruitment Manager in Atos.

As one of the largest employers in the Kujawsko-Pomorskie voivodeship, we actively participate in the development of the local community. We regularly organize free academies on various IT topics. The best participants receive a job offer in Atos. We have been actively cooperating with universities and high-schools for several years. Our experts, during various lectures and workshops, meet with students providing them practical knowledge in various IT areas. Our specialists have a real influence on the education of young people, both in language and IT area.

In February 2018, Atos was awarded with the title of “Employers of Pomorze and Kujawy 2017” for developing the organizational culture in the company and creating new jobs enabling professional development on the regional market. More information: atos.net/pl/kariera



Cybercom Poland, a digital transformation partner under the Swedish IT group, in the fourth quarter of 2016 launched another consulting unit in Poland. The company operates

in the field of modern technological solutions and is present also in Warsaw and Łódź. Currently, Bydgoszcz department employs 20, out of 1300 in Cybercom Group, highly qualified specialists in software development in .NET and JAVA technologies. After more than a year of work, the Bydgoszcz department is serving international clients, including Great Britain, Switzerland, and Sweden. Cybercom Poland focuses on providing solutions ideally suited to the customer needs, and its portfolio includes projects related to Software Development, Security, Cloud, and IoT. The team from Bydgoszcz specializes in software development by providing scalable scrum teams.

A great example of conducted projects is the support of the leader in video-on-demand (VOD) services. The company cooperates with nearly 650 leading film studios, TV networks, independent film producers and multi-channel networks (MCNs), providing videos to over 1,000 global video distributors. These services are available in over 37 countries, in 15 different languages. Cybercom Poland, in close cooperation with the customer, implements software created in .NET, supporting transmission platforms.

Cybercom Bydgoszcz focuses on further development, based on the creation of a comprehensive Competence Center within .NET and JAVA.



In Mobica we develop software. On a daily basis, we deliver high-end solutions for major companies from various industries including: Automotive, FinTech, Semiconductor, Mobile, TV and Broadcasting as well as Marine and Aviation.

Seven years – such a short period of time was enough for our site to evolve. From a small office in the Bydgoszcz City Center we moved to a new location in Danhouse Business Center, where over 200 people meet every day with one common goal. How did we get so far? The answer is simple. Our people are the foundation of Mobica. The true programming enthusiasts who work with us create the solutions for our clients with real passion. We are a team, not only while working but also in our free time. With that kind of spirit anyone can easily ask questions and learn. And when talking about knowledge sharing let us not forget that our experts were asked to give lectures at University of Science and Technology in Bydgoszcz and Nicolaus Copernicus University in Toruń.

Investors about themselves

Mobica is still growing. New projects enable us to employ more developers. We also run the three-month paid Internship Program where we welcome students, that want to start their adventure with programming.



Conducting business globally requires a resilient, dynamic strategy that is capable of managing the risks and challenges of international trade. Livingston International has a Global Trade Management solution that provides a truly international footprint, providing clients with tailored services spanning all aspects of global import and export trade operations.

Livingston's Global Trade Management team provides regional support and global oversight of your most critical trade activity. Having regional teams worldwide ensures that we can support your local needs, whether it's managing European Union transit reporting, complex Hong Kong licensing requirements, or the high-volume demands of a NAFTA program. We pull this complex model of diverse requirements together under an umbrella of global governance, audit and data management. Our focus on international trade clears the way for you to focus on growing your business faster, smarter and further.

To run our Global Trade Management business efficiently, we needed a dedicated center of excellence from which we could serve our European clients. In 2002, Bydgoszcz was chosen as the ideal location for our Global Trade Management operations in Europe. We started with just couple of employees and now we employ 90 people and the team is still growing.

The city offers a stable environment with skilled resources. It also creates a good climate for investments, business development and entrepreneurship. We have built our European business around talented individuals and the business-friendly culture of Bydgoszcz, placing key management staff in this location. It is a great place to do business.



A global technology leader at the heart of our connected world

Powered by the research and innovation of Nokia Bell Labs, Nokia serves communications service providers, governments, large enterprises and consumers, with the industry's most complete, end-to-end portfolio of products, services and licensing. From the enabling infrastructure for 5G and the Internet of Things, to emerging applications in virtual reality and digital health, Nokia is shaping the future of technology to transform the human experience. Nokia is a truly global company working in multi-cultural environment present in more than 100 countries.

Nokia Bydgoszcz – Technology Centre with a very rich heritage reflecting the history of the telecommunications engineering sector in Poland starting back in 1927 is a branch of the Finnish corporation since 2016. Nokia is the top global producer of ICT solutions, employing over 100 thousand employees worldwide and more than 4500 people in Poland. Only in Bydgoszcz it employs about 900 multidiscipline specialists.

Nokia, appreciating an essential contribution of the Bydgoszcz branch in building the company's global position, plans to continue the branch development, especially in R&D. Several infrastructure investments to be continued in the years to come have already been launched.

Because of its strategic and innovative position, Nokia Bydgoszcz leaves a strong footprint in the city and the region. Nokia local organization runs multiple initiatives to popularize research & development and networking sector within the society at the same time investing in the high schools and universities' students. It translates into such programs like: 'DevOps and Cloud R&D Academy for students', Internship programs, 'Women in IT' workshops, dedicated programs for high schools & universities, programming trainings for kids and many more...

To find out more about the company or career opportunities at Nokia Bydgoszcz Technology Centre, please visit: www.nokia.com or nokiabydgoszcz.pl

A stylish **Class A** office building

in the very heart of Bydgoszcz
Poznańska 3, Bydgoszcz, PL



Reception



Building Management System



Fiber-optic Internet connection



Room height 3.3m



Suspended ceilings



Elevated floors in office areas



Openable windows



Underground garage



3 parking spaces with charging stations for electric cars



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4

The labor market

In the Bydgoszcz-Toruń Agglomeration, there are 12 universities (7 in Bydgoszcz). In academic year 2016/2017, they had a total of almost 56,000 students, and every year send out more than 15,000 graduates. It is worth emphasizing that in Bydgoszcz students can earn degrees and skills particularly useful for work in BPO, SSC, IT and R&D centers. These universities offer programs in business administration, information technology, technical engineering, and philology.

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Randstad Polska Randstad Polska is the largest personnel consulting and temporary staffing agency on the Polish market. By combining passion for people with the power of today's technologies, the company supports people and organizations in realizing their true potential.
More at: www.randstad.pl

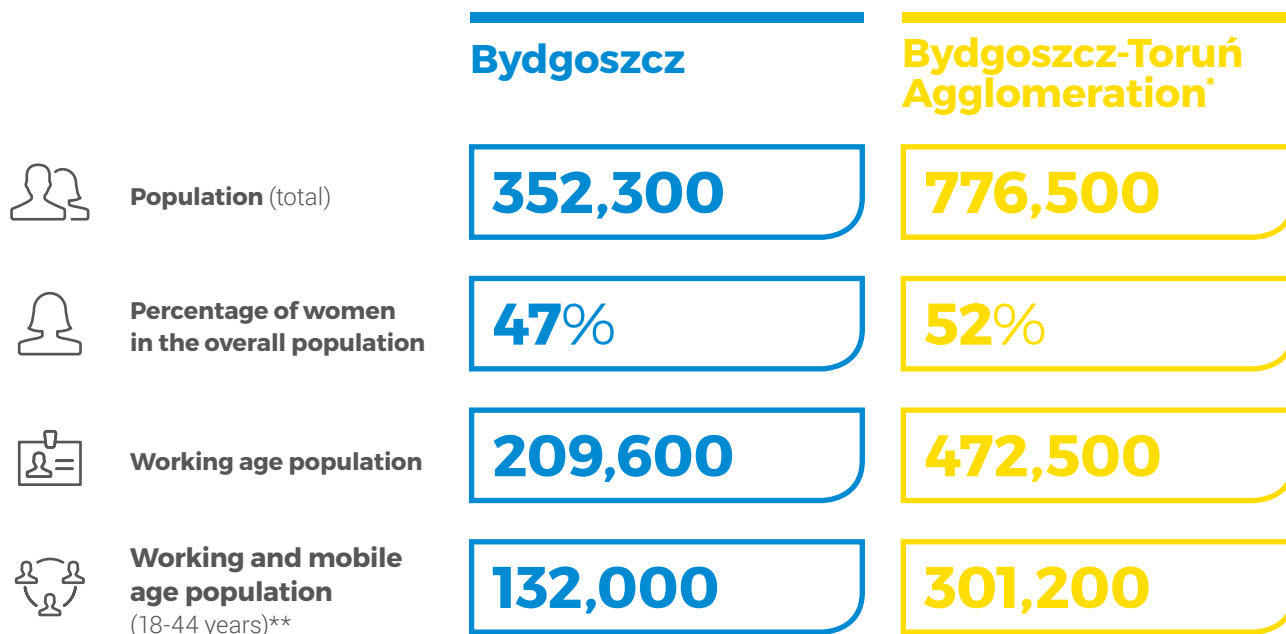
Randstad Sourceright to światowy lider HR wspierający pracodawców w budowaniu strategii pozyskiwania talentów i zarządzania kapitałem ludzkim. Nieustannie tworzymy i udoskonalamy rozwiązania z zakresu: recruitment process outsourcing (RPO), managed services programs (MSP) oraz zintegrowanych programów zarządzania talentami.



Photo: Shutterstock

FIGURE 11

BASIC DEMOGRAPHICAL INFORMATION ON BYDGOSZCZ AND THE BYDGOSZCZ-TORUŃ AGGLOMERATION



Note: figures given have been rounded off

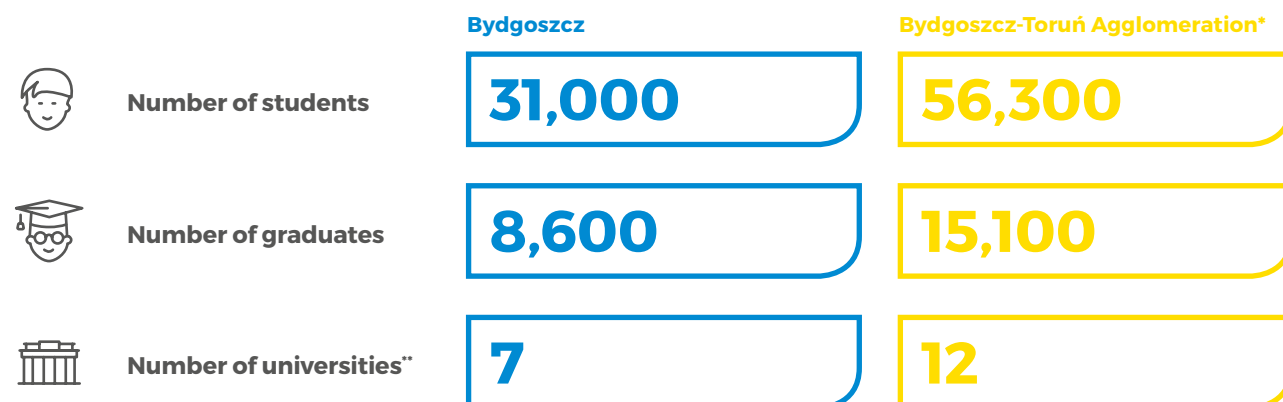
* Bydgoszcz, Toruń

** age range contained within the working age bracket and comprising persons who are able to move to a different position or place of work, or can re-train

Source: Central Statistical Office of Poland (31.12.2017 r.)

FIGURE 12

EDUCATIONAL POTENTIAL OF BYDGOSZCZ AND THE BYDGOSZCZ-TORUŃ AGGLOMERATION



Note: figures given have been rounded off

* Bydgoszcz, Toruń

** excluding affiliates

Source: Central Statistical Office of Poland, Local Data Bank (bdl.stat.gov.pl); Advanced training in academic year 2016/2017 (graduates – state in academic year 2015/2016)

FIGURE 13

NUMBER OF STUDENTS ENROLLED IN EACH OF BYDGOSZCZ-TORUŃ AGGLOMERATION'S UNIVERSITIES



Universities in Bydgoszcz

8,100

KAZIMIERZ WIELKI
UNIVERSITY IN BYDGOSZCZ
Public university

7,800

UTP UNIVERSITY OF
SCIENCE AND TECHNOLOGY
IN BYDGOSZCZ
Public university

5,500

NICOLAUS COPERNICUS
UNIVERSITY
COLLEGIUM MEDICUM
IN BYDGOSZCZ
Public university

3,300

THE WSB UNIVERSITY
IN BYDGOSZCZ
Private university

3,200

UNIVERSITY OF ECONOMY
IN BYDGOSZCZ
Private university

1,800

KUJAWY AND POMORZE
UNIVERSITY IN BYDGOSZCZ
Private university

1,350

UNIVERSITY OF BYDGOSZCZ
Private university

600

THE FELIKS NOWOWIEJSKI
ACADEMY OF MUSIC
Public university

140

THE ACADEMY OF HEALTH
SCIENCES IN BYDGOSZCZ
Private university



Other universities in Bydgoszcz-Toruń Agglomeration

19,000

THE NICOLAUS COPERNICUS
UNIVERSITY IN TORUŃ (NCU)
Public university

4,400

THE WSB UNIVERSITY
IN TORUŃ
Private university

700

THE JAGIELLONIAN COLLEGE
Private university

400

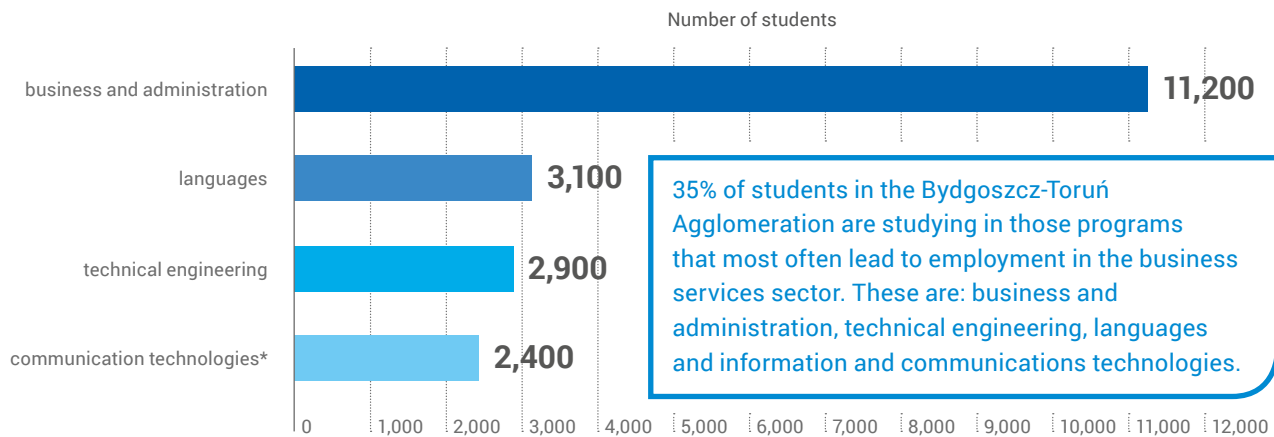
THE COLLEGE OF SOCIAL
AND MEDIA CULTURE (CSMC)
Private university

Please note: the numerical values have been rounded up.

Source: Central Statistical Office: Colleges and universities in the 2016/2017 academic year (students: as at November 30, 2016, graduates: as at the 2015/2016 academic year). Data updated on the basis of the Central Statistical Office report "Higher Education Institutions and Their Finances in 2016" and on the website: www.umk.pl

FIGURE 14

STUDENTS OF LANGUAGES, BUSINESS AND ADMINISTRATION, INFORMATION AND COMMUNICATIONS TECHNOLOGIES AND TECHNICAL AND ENGINEERING FACILITIES IN THE BYDGOSZCZ-TORUŃ AGGLOMERATION (2016/2017 ACADEMIC YEAR)



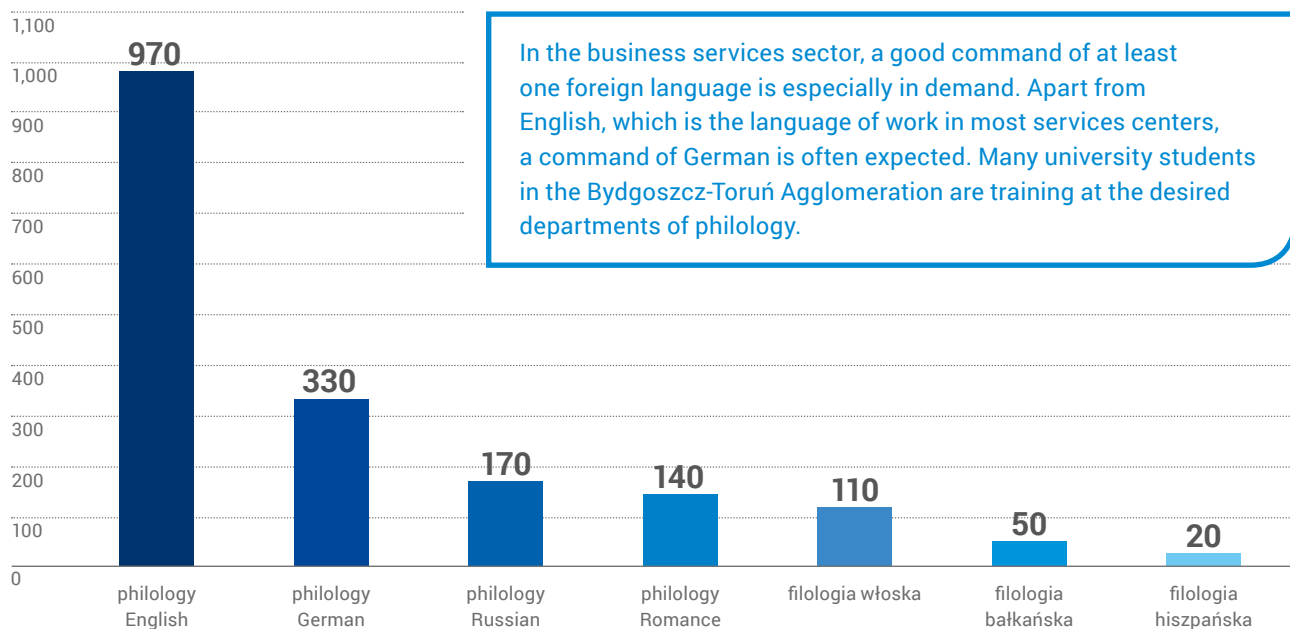
Note: figures given have been rounded off

* together with a subgroup of interdisciplinary programs and qualifications covering information and communications technologies

Source: Central Statistical Office: Colleges and universities in the 2016/2017 academic year (students: as at November 30, 2016, graduates: as at the 2015/2016 academic year). Data does not include affiliates.

FIGURE 15

NUMBER OF STUDENTS OF SELECTED PHILOLOGY PROGRAMS IN THE BYDGOSZCZ-TORUŃ AGGLOMERATION



Note: figures given have been rounded off

Source: Central Statistical Office: Colleges and universities in the 2016/2017 academic year (students: as at November 30, 2016, graduates: as at the 2015/2016 academic year). Data does not include affiliates.

The labor market

TABLE 3

GROSS MONTHLY SALARY (IN EUR) AT BPO/SSC/IT/R&D CENTERS IN BYDGOSZCZ FOR EMPLOYEES WHO SPEAK ENGLISH

The tables of remuneration were prepared on the basis of an analysis by Randstad of remuneration offered during recruitment processes in the business services sector in Bydgoszcz. Data are from Q1 2018.

F&A: GL

	Min	Max
Junior Accountant (1-2 years' experience)	830	1,000
Accountant (2-3 years' experience)	950	1,240
Senior Accountant (over 3 years' experience)	1,190	1,550
Team Leader (team of 5-15 people)	1,790	2,140
Manager (team of up to 50 people)	2,380	3,810

F&A: AP / AR

	Min	Max
Junior Accountant (1-2 years' experience)	760	950
Accountant (2-3 years' experience)	900	1,190
Senior Accountant (over 3 years' experience)	1,120	1,480
Team Leader (team of 5-15 people)	1,550	2,020
Manager (team of up to 50 people)	2,140	3,330

Customer Service

	Min	Max
Junior Specialist (without experience)	670	830
Specialist (more than 1 year's experience)	830	1,070
Team Leader (team of 5-15 people)	1,310	1,790
Manager (team of up to 50 people)	1,790	2,860

IT

	Min	Max
1st Line Support (2 years' experience)	950	1,190
2nd Line Support (2 years' experience)	1,190	1,550
3rd Line Support (2 years' experience)	1,550	2,140
IT Administration (3 years' experience)	1,190	1,900
Network / Security (3 years' experience)	1,310	2,140
Business / System Analyst (3 years' experience)	1,310	2,020
Developer (3 years' experience)	1,670	2,620
Tester (3 years' experience)	1,190	2,140
Team Leader (team of 5-15 people)	1,900	3,100
Project Manager (team of up to 50 people)	2,380	3,570

Source: Randstad Polska & Randstad Sourceright

SPIE Polska

- With around **450 employees**, we provide multi-technical Facility Management services for more than **200 buildings** in Poland in the sectors: office, logistics, industry, retail.
- Our FM strategy is based on the concept of **comprehensive and integrated** maintenance of buildings, installations and equipment in a way to **maximize the benefits** for their users.
- Our employees are **experts** in the technical maintenance, while in the field of infrastructure and administration services we cooperate with **trusted partners**.

Our specialized services

FIT OUT

office space arrangements and rearrangements, adaptation of building installations to the tenants' needs, design and visualization of modern spaces

MOBILE SERVICE

service for buildings that do not require constant supervision, emergency call 24/7

HVAC SERVICE

maintenance, modernizations, expert reports and inspections of air-conditioning and ventilation systems

LOW VOLTAGE SERVICE AND FIRE SECURITY

electric and teletechnical installations, building automation, BMS, fire security systems

**What makes
us the leader
of Facility
Management
market**

We **adapt services** to the customer's needs and the specificity of the building

We take **responsibility for the efficient maintenance** of installations and systems
– that definitely helps our clients focus on their core business

We advise how to **minimize media consumption** and operating costs of the building

We have favorable **framework agreements with suppliers** of materials and services

SPIE Polska

Regional office in Sopot: Smolna Street 3c/3, 81-877

Project Group Manager: Paweł Zdrodowski, +48 609 918 176, pawel.zdrodowski@spie.com

Junior Project Manager: Agnieszka Gierulska, +48 785 787 789, agnieszka.gierulska@spie.com

Head office in Warsaw: Wołoska Street 5, 02-675

www.spie.com.pl

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Office market

In recent years, the importance of Bydgoszcz as an office location has significantly increased and the office supply has crossed the 77,000 sqm threshold. Office market in Bydgoszcz is constantly trying to meet the needs of business services centers, which results in continuous increase in office stock.

Chapter content provider: JLL

JLL is a leading professional services firm that specializes in real estate and investment management. A Fortune 500 company, JLL helps real estate owners, occupiers and investors achieve their business ambitions. At the end of 2017, JLL had nearly 300 corporate offices, operations in over 80 countries and a global workforce of 82,000. More at: www.jll.pl



Photo: Robert Sawicki

Since the end of 2015 almost 17,000 sqm of modern offices have been delivered. It is worth noting that during this period, the vacancy rate has declined from 14,1% to 9,9%. This shows that the office market in Bydgoszcz is highly absorptive.

In recent years five large projects have been completed: "IDEA Przestrzeń Biznesu" (2015), Dworzec Główny (2016), Nordic Heaven (2016), Optimum Park (2016) and Biznes Park Kraszewskiego – Teta (2017).

Approx. 30% of office stock in Bydgoszcz was completed in the last 3 years. It means that this office market is very dynamic and large portion of office space in the city represents modern standard. It should be underlined that in Q1 2018 over 28,000 sqm were under construction, including such projects as: Immobile K3 (6,200 sqm), Arkada Business Park (9,700 sqm) and Bydgoskie Centrum Finansowe "Drukarnia" (7,100 sqm). The last one used to be a shopping center and will be converted into office building. Another building – KWADRAT City Office (over 5,000 sqm) is under reconstruction and will be delivered by the end of 2019.

It is forecasted that office supply in Bydgoszcz will increase by almost 30% just within two years. Despite the growing supply of office space, the vacancy rate is constantly decreasing. In long-term, another 14,800 sqm is at the planning stage. Most of the planned office space will be located along Fordońska street. It is also worth mentioning the Hunger Development project at Towarowa 36 Street (15,000 sqm), which is waiting for first pre-let in order to commence construction. Majority of existing offices are situated in the city center, around Bydgoszcz Main Railway Station in north-western part of city and along Fordońska street.

The largest lease agreement in Q3 2017 was signed in Biznes Park Kraszewskiego, where Atos decided to renew and expand its lease of 21,700 sqm. Worth to mention that this was second largest deal signed in Poland in 2017. Prime headline rents for offices in Bydgoszcz are very attractive: A-class space can be leased for between €9.6 and €12.5 / sqm / month. Service charges are quoted in Polish Złoty. No substantial changes in prime headline rents are expected.



77,000 sqm

Total office stock.



9.6-12.5 €

Prime rents.



9.9 %

Vacancy rate.

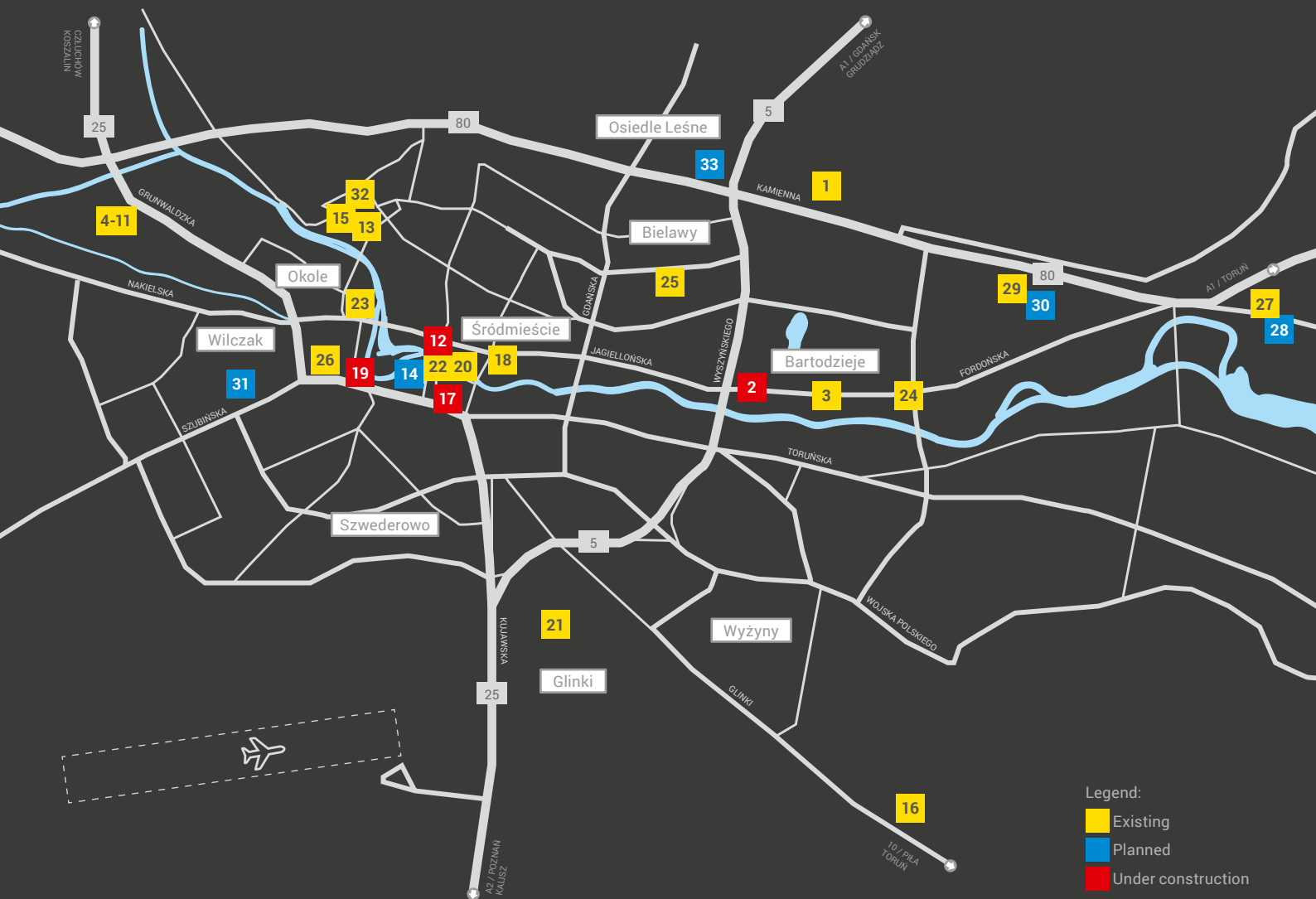


28,000 sqm

Office space under construction.

FIGURE 16

MAP OF OFFICE BUILDINGS IN BYDGOSZCZ



- | | | |
|-----------------------------------|--|---|
| 1 ALSTAL biurowiec | 12 Bydgoskie Centrum Finansowe 'Drukarnia' | 23 Nordic Haven |
| 2 Arkada Business Park | 13 Centrum Biznesu Unii Lubelskiej 4c | 24 Optimum Park |
| 3 Arkada Galeria Wnętrz | 14 Centrum Przysięcze | 25 Powstańców WŁKP |
| 4 Biznes Park Bydgoszcz – Alfa | 15 Dworzec Bydgoszcz Główna | 26 Poznańska 31 |
| 5 Biznes Park Bydgoszcz – Beta | 16 IDEA Przestrzeń Biznesu | 27 Przemysłowa 8 – Bydgoskie Centrum Biznesu I |
| 6 Biznes Park Bydgoszcz – Delta | 17 Immobile K3 | 28 Przemysłowa 8 – Bydgoskie Centrum Biznesu II |
| 7 Biznes Park Bydgoszcz – Epsilon | 18 Jagiellońska 21 | 29 Scanpark Business Center – DANHOUSE |
| 8 Biznes Park Bydgoszcz – Eta | 19 KWADRAT City Office | 30 Scanpark Business Center II |
| 9 Biznes Park Bydgoszcz – Gamma | 20 mBank biurowiec | 31 Seminaryjna |
| 10 Biznes Park Bydgoszcz – Teta | 21 ML Office | 32 Warszawska 25 |
| 11 Biznes Park Bydgoszcz Dzeta | 22 Mostowa 2 | 33 Platynowy Park Office |

22 000m²

PREMIUM OFFICE SPACE

BREEAM®

VERY GOOD CERTIFICATE

A class

BREEAM OFFICE COMPLEX



ARKADA
BUSINESS PARK

Bydgoszcz, Fordońska 2

1st phase ready in Q3 2018

Developer:
Arkada Holding

www.arkadaoffice.pl

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Quality of life and business support

Bydgoszcz is an important, energetic center of culture and art. Among the numerous cultural events that increase the city's attractiveness for both residents and tourists are the prestigious Bydgoszcz Opera Festival, the Bydgoszcz Water Festival "Ster na Bydgoszcz", concerts by the Pomeranian Philharmonic.

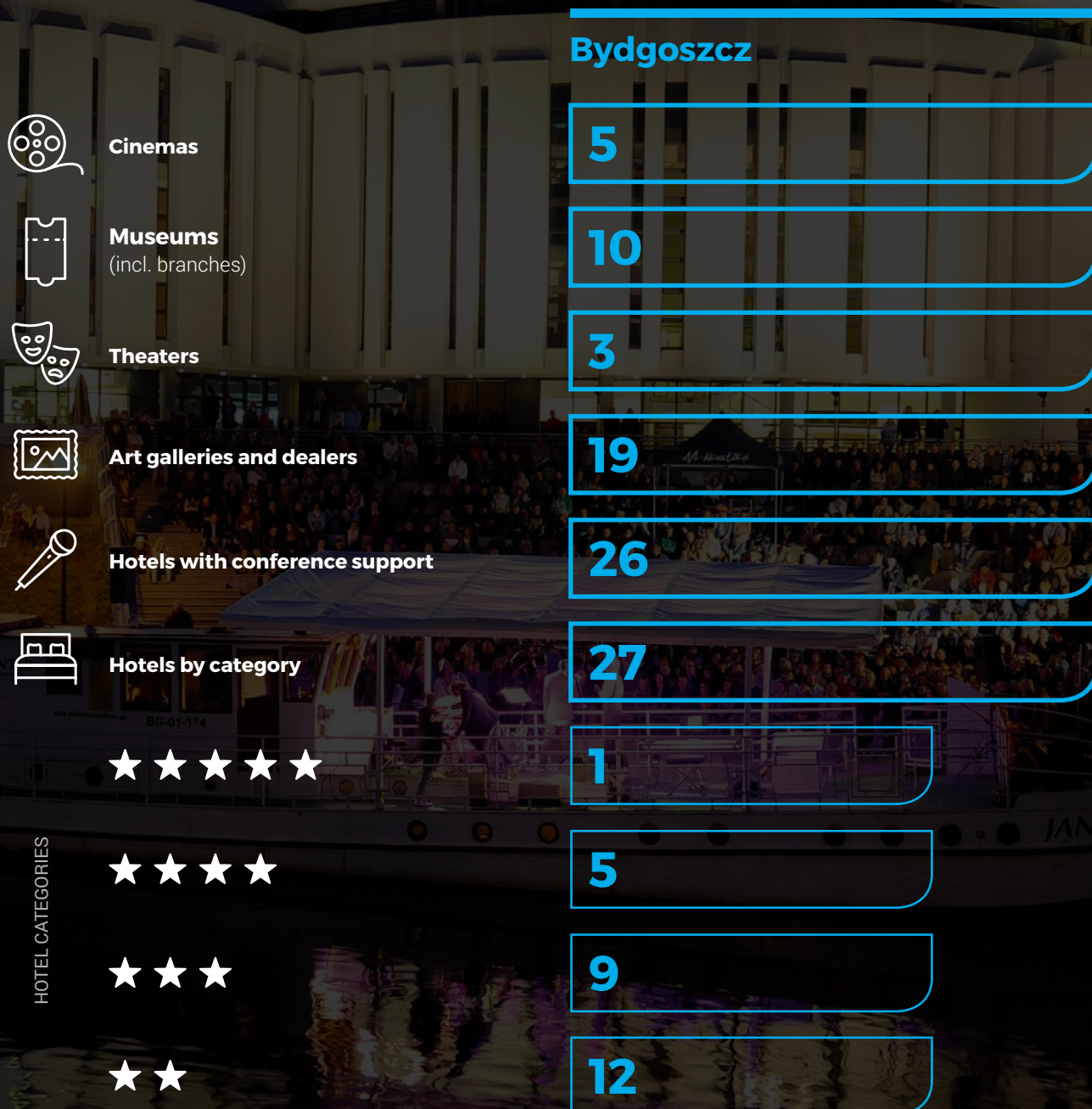
Bydgoszcz is also the host city of large-scale, nationwide and international sporting events. The city is popular among tourists for its intriguing architecture and the many types of leisure it offers. Bydgoszcz ranks third in Poland among towns with county rights in terms of share of parks, green areas and green estate grounds. What's more, it is located near many attractive woodland areas, such as the Tuchola Forest and Bydgoszcz Forest.



Photo: Robert Sawicki

FIGURE 17

SELECTED INFORMATION ON CULTURAL FACILITIES AND HOTEL AND CONFERENCE FACILITIES IN BYDGOSZCZ



Mill Island is one of the most charming places in Bydgoszcz, known as the “Heart of the City” and “Venice of Bydgoszcz”. Its many wharfs, weirs, waterfalls and green areas lend themselves to active leisure. With its museums and the opera house, the island is also home to numerous cultural events.

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Investor support

Bydgoszcz is successively, continually changing its image from that of an industrial center to that of an excellent location for technologies and services. It has good transportation connections; a young, well-educated community; fast-acting, appropriately-profiled training programs; a well-developed business environment; and a wide range of investment offers, all of which make Bydgoszcz a city worth investing in.



Photo: Robert Sawicki

The Bydgoszcz Regional Development Agency provides investor support as broadly understood and promotes the city's economy, providing comprehensive services for investment processes at every stage of implementation, as well as post-investment services for businesses. The Agency works according to a one-stop-shopping business model, with a single point of contact for investors in their relations with local government and the local market.

Support for investors:

- » **Support from the Bydgoszcz Regional Development Agency**, carrying out tasks to promote the economy and serve investment projects in Bydgoszcz.
- » **A dedicated Project Manager** for each investment project, working directly along with the investor at every stage of the process.
- » **Support in the process of recruiting managers and employees** and hiring from among the local community.
- » **Market surveys tailored to the investor's needs**, based on local data on the labor market, available real estate and academic potential.
- » **A database of commercial real estate offers** that includes greenfield properties, office premises, and halls and warehouses for lease.
- » **Dedicated promotional projects** aimed at increasing the investor's brand recognition on the local market.
- » **Tax relief on real estate** for the creation of new jobs or investments in office real estate of a high standard in newly-constructed buildings.
- » **Income tax relief** within the Special Economic Zone.
- » **Access to government investment grants.**



**Bydgoszcz Regional
Development Agency**
ul. Unii Lubelskiej 4C
85-059 Bydgoszcz

☎ +48 52 585 88 23

✉ barr@barr.pl

🌐 barr.pl

POLAND: COUNTRY OVERVIEW

SELECTED ECONOMIC INDICATORS



GDP Growth

4.6% (2017)
4.0% (2018)*



GDP per capita (2017)

12,100 €



Unemployment rate (March 2018)

6.6%



Inflation (March 2018)

1.3%



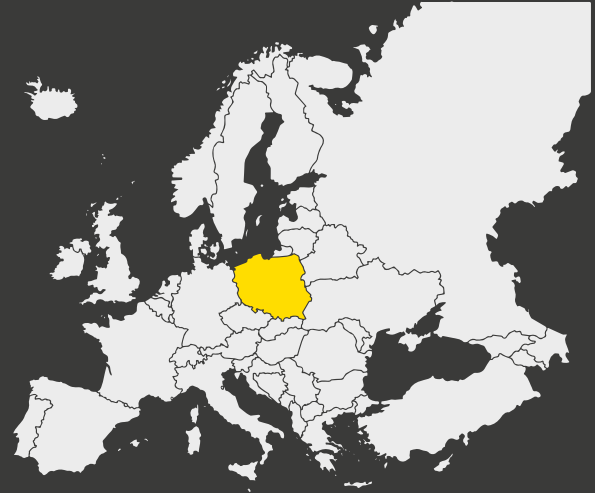
EUR/PLN (average)

4.26 (2017)



USD/PLN (average)

3.78 (2017)



Poland has the ninth-largest economy in the European Union in terms of nominal GDP (466 billion euros in 2017) and has been a leader in economic growth in the EU in the past ten years. One of the most important branches contributing to the growth of Poland's economy is the business services sector. The industry's impressive growth in recent years enabled Poland to strengthen its standing among the world's most important locations for investments into (BPO, SSC, IT and R&D) business services centers.

Language: **Polish**

Currency: **złoty (PLN)**

Number of cities with over 100,000 residents: **39**

Number of direct foreign investments in 2017: **335 (1st place in EU)**

POLAND IN INTERNATIONAL ORGANIZATIONS

EU (2004), NATO (1999), OECD (1996), WTO (1995), UN (1945) and others

* National Bank of Poland forecast

Source: Central Statistical Office of Poland, National Bank of Poland, Eurostat

CLASS A & B+ OFFICE BUILDINGS IN BYDGOSZCZ

BUILD TO SUIT

TOWAROWA 36
UP TO 15.000 M²



PRIME LOCATION

JAGIELLOŃSKA 21
150 - 2.500 M²



