FOCUS ON

Tricity

Monika Grzelak
Team Leader | Centre
for Investments, PAIH

The Tricity is the largest business services center in northern Poland. It is a mature location, aware of its strengths and capable of leveraging them. The Tricity is the combined advantage of Gdansk, Sopot, Gdynia and the surrounding municipalities.

The Polish Investment and Trade Agency (PAIH) supports investors in choosing a location that fulfills their requirements. The main criteria usually listed by PAIH's clients include the availability of specialists, adequate office and transportation infrastructure, as well as the quality of life. The importance of the latter is more and more emphasized by the investors, especially with regard to access to recreation venues, presence of green areas, and air quality. In these aspects, the Tricity has no equal in the country. Among all business services locations, the Tricity is distinguished by high quality of life and a high level of satisfaction of its citizens.

The region's academic potential also plays a major role in the development of the sector in the Tricity. It is the location of the country's top medical university – the Medical University of Gdańsk – as well as the Gdańsk University of Technology, one of the best and most innovative technical universities in Poland. High educational standards at the local technical faculties has facilitated a large inflow of IT investments – according to PAIH's data, nearly a half of investment projects from the business services sector in the Tricity are IT centers. The vast offer of Nordic language studies at the University of Gdańsk, in turn, helps to attract Scandinavian investors, as the Tricity is the preferred location for companies from the region, especially from Norway.

Another attractive factor is the network of convenient air connections with Scandinavian countries. A well developed multimodal transport system, together with a fast developing office market, also allow us to be greatly optimistic about the future of the sector and the region.

Wiktor Doktór
CEO, Pro Progressio

Pomerania, especially Tricity and City of Gdańsk have been the direction of development of the modern business services sector in Poland for many years. Gdańsk, together with Gdynia and Sopot, constitutes an excellent business ecosystem that, thanks to the well-developed urban infrastructure, fosters the development of many industries. The beneficiaries here are also companies such as GBS, BPO, IT and R&D, which are the main tenants of modern office space in several business districts of the Tricity, mainly in the area of Gdańsk Oliwa.

An unquestionable advantage of the Tricity is the perfect climate, which allows the business life to be seamlessly combined with the private life, creating a unique in Poland, almost book-like form of "Work-Life Balance".

The people supplying Tricity companies are not limited to employees from the Pomeranian Voivodeship. Thanks to its attractiveness and city offer addressed to residents, employees from other Polish cities, but also from many other countries, are willing to move to the Tricity.

Undoubtedly, the development of the BSS sector in the Tricity is due to the support offered to this industry by "Invest in Pomerania" – Regional Development Agency, one of the most innovative, entrepreneurial and best understanding of the needs of the business services industry in Poland.

Enjoy reading *Focus on Tricity* – a compendium of knowledge about the BSS sector environment in Gdańsk, Gdynia and Sopot.

3

/City

415 km²
Town area

752 974
Population

20%
Gdańsk
Green areas

58%
Sopot

45%
Gdynia

1 596 283
Population of the Agglomeration

6,5%
2012

6,5%
2013

6,3%
2012

6,3%
2013

5,8%
2014

5,5%
2011

1,4%
2019

5,5%
2014

5,4%
2011

4,9%
2015

4,8%
2013

4,6%
2012

4,1%
2014

4%
2011

4%
2015

4%
2016

3,7%
2017

3,4%
2015

3,6%
2016

3,7%
2017

2,9%
2016

2,6%
2018

2,7%
2017

2,3%
2019

2,5%
2020

2,4%
2018

2,2%
2020

2,1%
2019

2,1%
2020

1,8%
2018

1,4%
2019

Unemployment rate

Gdynia   Gdańsk   Sopot
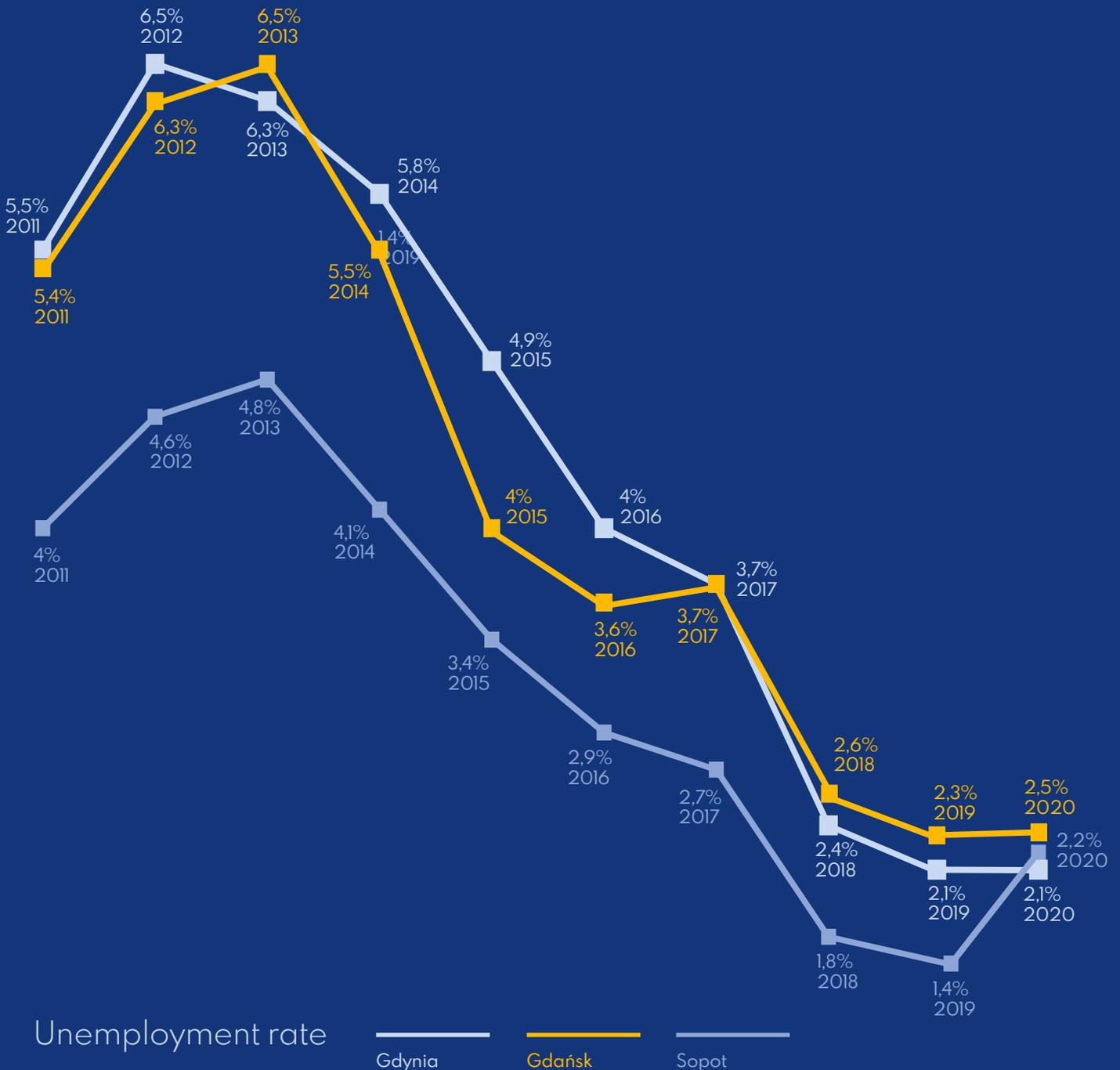
32

Universities
12 public universities
20 private universities

♂ 20 246
♂♂♂ 78 120

215

Kindergartens
67 public kindergartens
146 private kindergartens

Primary schools: **170** ♂♂♂ 54 188

High schools: **56** ♂ 4 057 ♂♂♂ 13 480

Technical schools: **29** ♂ 1 906 ♂♂♂♂♂♂ 9 143

♂	SUBJECTS*	♂
5 026	philology (foreign languages)	1 031
24 654	administration, business and law	5 955
5 923	IT/ICT	966
14 010	engineering and technology	3 554
2 582	logistics	554
10 463	medicine	1 302

♂ Gratuates

♂ Students

*data for Pomerania region

/Transport

29 car rentals

200 hybrids vehicles and electric cars for rent

32 taxi companies

6 002 taxis
PLN 8 average initial charge
PLN 2,8 average cost per km

153 bus lines

136 day bus lines
17 night bus lines

11 tram lines
(Gdańsk)

Public Transport tickets

PLN 3,8 normal ticket price
PLN 14 one-day ticket price
PLN 99 monthly ticket price

1 500 electric scooters for rent

151 electric mopeds for rent

1 884 city bikes

826,7 km length of bicycle routes
1 283 city bikes stations
PLN 6 / h rental cost

Distance from Tricity to other cities:

City	Distance
Warsaw	354 km
Wrocław	472 km
Poznań	327 km
Szczecin	348 km
Łódź	353 km
Katowice	550 km
Cracow	601 km
Rzeszów	668 km
Lublin	523 km
Berlin	490 km
Hamburg	748 km
Prague	780 km
Minsk	716 km
Kiev	1127 km
Moscow	1461 km
Vilnius	577 km

Roads

1 highway
2 express ways
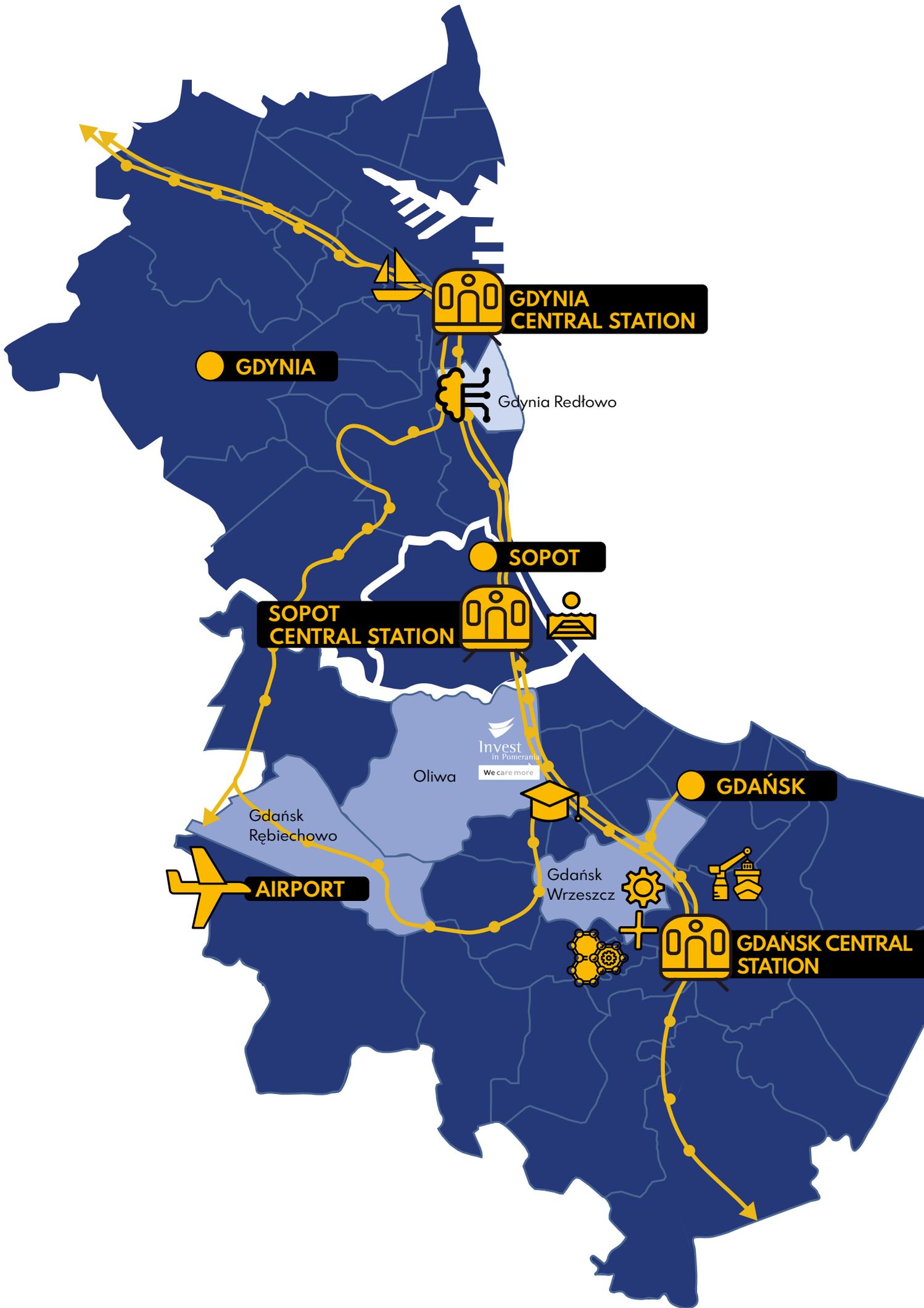**68** regional roads
6 national roads

Gdańsk Airport – regular flights

Aarhus	London Luton
Aberdeen	London Stansted
Alesund	London Gatwick
Alicante	Lviv
Amsterdam	Malmo
Athens	Malta
Barcelona	Manchester
Belfast	Milan
Bergen	Molde
Billund	Munich
Birmingham	Newcastle
Bodo	Odessa
Bristol	Oslo
Burgas	Oslo Torp
Kharkiv	Paphos
Cork	Paris
Doncaster Sheffield	Reykjavik
Dortmund	Rzeszów
Dublin	Stavanger
Edinburgh	Stockholm
Eindhoven	Tromso
Frankfurt	Trondheim
Gothenburg	Turku
Hamburg	Vaxjo
Haugesund	Warsaw
Kalamata	Vienna
Kyiv Borispil	Wrocław
Kyiv Zhuliany	Zaporizhia
Cologne Bonn	
Copenhagen	
Cracow	
Larnaca	
Leeds	
Liverpool	

GDAŃSK

GDYNIA
CENTRAL STATION

GDYNIA

Gdynia Redłowo

SOPOT

SOPOT
CENTRAL STATION

Invest
in Pomerania
We care more

Oliwa

GDAŃSK

Gdańsk
Rębiechowo

AIRPORT

Gdańsk
Wrzeszcz
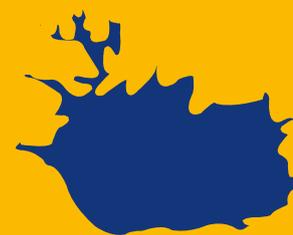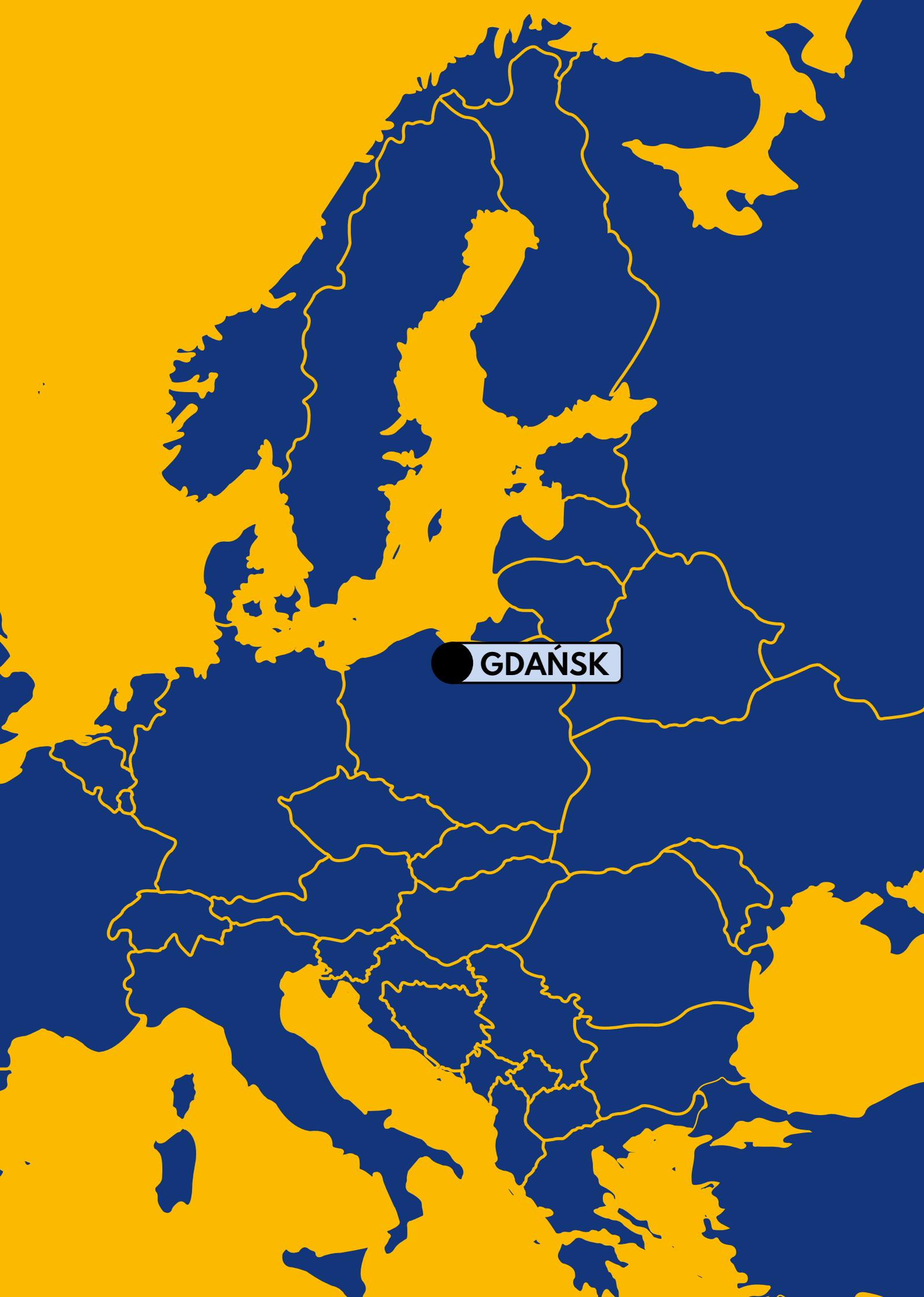
GDAŃSK CENTRAL
STATION

Distance from Gdańsk Central Station

Airport — 🚗 **20 min**

Invest in Pomerania — We care more — 🚗 **15 min**

Gdańsk University of Technology — 🚶 **37 min** / 🚗 **10 min**

University of Gdańsk — 🚗 **20 min**

Medical University of Gdańsk — 🚶 **30 min** / 🚗 **7 min**

Gdynia Maritime University — 🚗 **40 min**

Gdańsk Science and Technology Park — 🚶 **54 min** / 🚗 **14 min**

Pomeranian Science and Technology Park in Gdynia — 🚗 **45 min**

Gdańsk Shipyard — 🚶 **55 min** / 🚗 **12 min**

Sopot Pier — 🚗 **32 min**
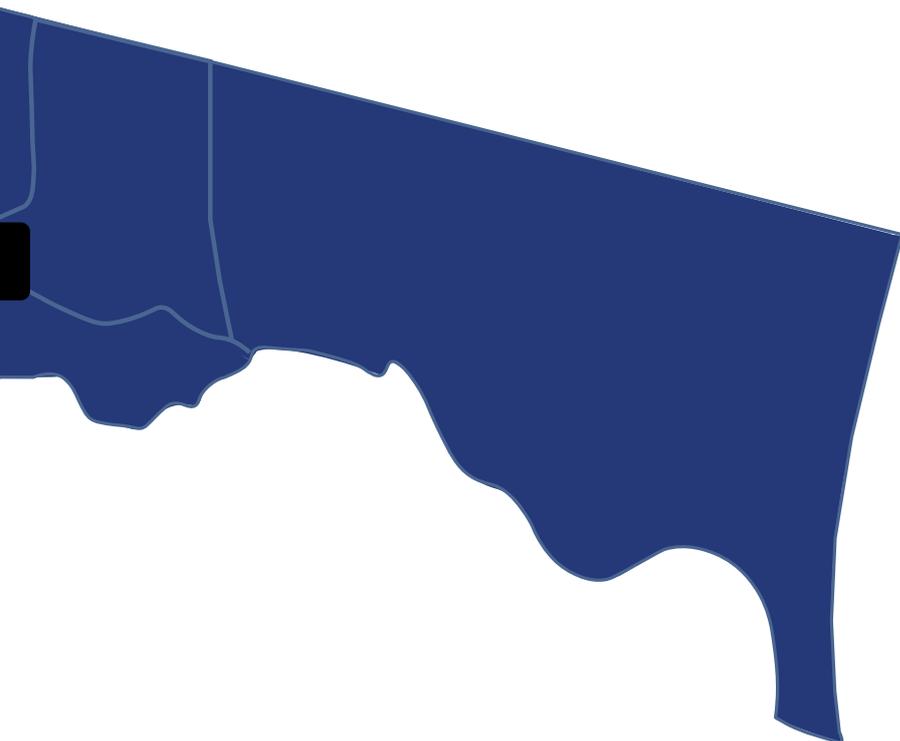
Residential and business district

Railway junction

/Real Estate

Offices

Total existing A/B+ Class office space	868 400 sq m
Total A/B+ Class office space under construction	216 100 sq m
Total A/B+ Class office space planned	347 800 sq m
A/B+ Class office spaces	123
A/B+ Class office spaces under construction	15
Planned A/B+ Class office spaces	30
Minimum rent in A/B+ Class	EUR 12,50 / sq m
Maximum rent in A/B+ Class	EUR 14,75 / sq m
Average services fees in A/B+ Class	PLN 17,00 sq m

Selected office spaces

BUILDING	ADDRESS	DEVELOPER	TOTAL EXISTING SPACE	TOTAL PLANNED SPACE
3T Office Park	Sportowa / Górskiego / droga Gdyńska, Gdynia	Allcon	-	38 500 sq m
Alchemia	Al. Grunwaldzka 411, Gdańsk	Torus	107 400 sq m	-
Centrum Biurowe Neptun	Al. Grunwaldzka 103a, Gdańsk	Hines	15 300 sq m	-
Olivia Business Centre	Al. Grunwaldzka 472, Gdańsk	Olivia Business Centre	172 200 sq m	53 700 sq m
Palio Office Park	Jana z Kolna 11, Gdańsk	Cavatina	-	88 300 sq m
Tensor	Łużycka 8, Gdynia	Euro Styl	19 700 sq m	-
Tryton Business House	Jana z Kolna 11, Gdańsk	Echo Investment	21 300 sq m	-
Wave	Al. Grunwaldzka 343-345, Gdańsk	Skanska	23 600 sq m	22 200 sq m

Warehouses

|	
Total existing warehouse space:	731 800 sq m
Total warehouse space under construction	236 500 sq m
Total planned warehouse space	885 800 sq m
Avarage rent in warehouses (city and environs)	EUR 3.00–3.50 / sq m

Selected warehouses

BUILDING	ADDRESS	DEVELOPER	TOTAL EXISTING SPACE	SPACE UNDER CONSTRUCTION	TOTAL PLANNED SPACE
Goodman Pomeranian Logistics Centre	Kontenerowa 21, Gdańsk	Goodman	149 800 sq m	-	355 200 sq m
Gdańsk Kowale Distribution Centre	Magnacka 4/15, Kowale	7R	127 600 sq m	-	-
Panattoni Park Gdańsk Airport	Botaniczna, Gdańsk	Panattoni	-	68 500 sq m	43 000 sq m

Shopping malls

	Tricity	Agglomeration
Number of shopping malls	28	33
Total existing space	733 400 sq m	814 600 sq m
Total planned space	0	0
Total empty space (2019)	3,7%	4%

Selected shopping malls

BUILDING	ADRESS	DEVELOPER	TOTAL EXISTING SPACE
Centrum Riviera	Górskiego 2, Gdynia	Mayland RE	68 100 sq m
Forum Gdańsk	Targ Sienny 7, Gdańsk	Multi Development	62 000 sq m
Galeria Bałtycka	Al. Grunwaldzka 141, Gdańsk	ECE	39 500 sq m

Source: Savills

BPO **7,1%**

CoE
3,8%

SSC **25%**

R&D **10,3%**

IT **53,8%**
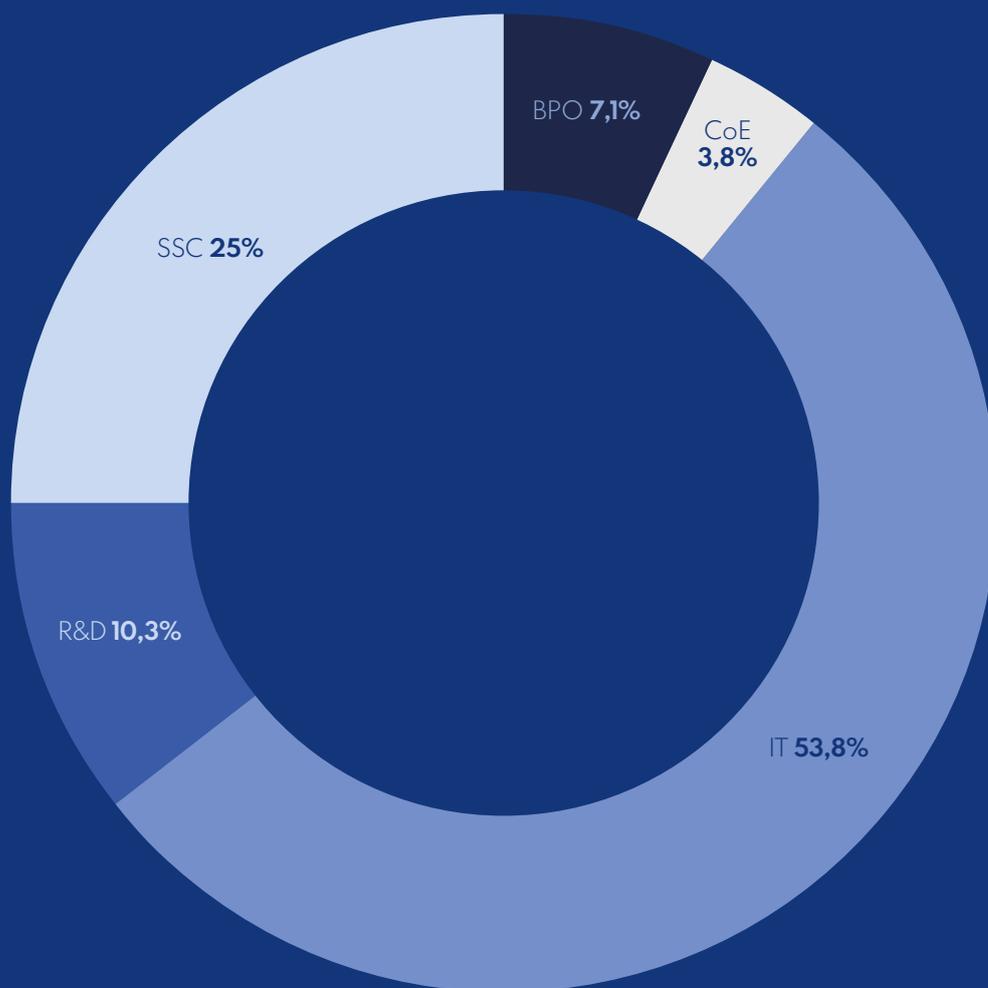
Type of operation

Institutions supporting entrepreneurship

- Invest in Pomerania
- Pomeranian Science and Technology Park in Gdynia
- Gdańsk Science and Technology Park
- Baltic Port of New Technologies in Gdynia
- Gdańsk Business Incubator STARTER
- Gdynia Business Incubator
- Business Centre Club – Gdańsk chamber
- Agency for Professional Promotion of Women
- Pomerania Development Agency Co.
- Economic Foundation
- Gdańsk Entrepreneurship Foundation
- Gdynia Entrepreneturship Support Centre
- Gdańsk Business Club
- Pomeranian Employers
- The Gdańsk Institute for Market Economics Research
- Inveno
- Pomeranian Special Economic Zone
- Pomeranian Chamber of Crafts for Small and Medium Enterprises
- The Polish Association of Centers for Technology Transfer
- Free Entrepreneurship Association
- InvestGDA

Outsourcing centres using foreign languages

- Polish: **155**
- Dutch: **13**
- Portuguese: **9**
- Norwegian: **24**
- Greek: **5**
- Swedish: **20**
- Finnish: **12**
- Turkish: **7**
- Arabic: **5**
- Chinese: **3**
- Japanese: **3**
- Czech: **6**
- Slovak: **7**
- Bulgarian: **3**
- Romanian: **3**
- Slovenian: **3**
- Serbian: **4**
- English: **144**
- German: **38**
- Spanish: **20**
- French: **22**
- Italian: **16**
- Russian: **16**
- Hungarian: **6**
- Ukrainian: **8**
- Danish : **17**
- Korean: **1**
- Malaisian: **1**
- Latvian: **2**
- Lithuanian: **3**
- Estonian: **2**
- Hebrew: **3**

Total number of business entities

107.354

COMPANY	TYPE OF OPERATION	COMPANY	TYPE OF OPERATION
10sit	IT	Dynatrace Polska	IT
Acoustic	R&D	Eaton Electric	R&D
Acxiom Corporation	IT	ELTEL Group Shared Services Centre	SSC
Adva Optical Networking	IT	Enamor	R&D
AirHelp Poland	SSC	Energa Centrum Usług Wspólnych	SSC
Alexander Mann Solutions	BPO	Ensono	IT
Amazon Development Center in Gdansk	R&D	EPAM Systems Poland	IT
Andiamo	R&D	ERGO International Corporate Solutions (EICS)	SSC
APL Poland	SSC	Eurofins Digital Testing	IT
Aplitt	IT	Evatic	IT
Arla Global Financial Service Centre	SSC	Federal-Mogul Financial Services Poland	SSC
Arrow Services Sp. z o.o.	SSC	Finastra (former Misys)	IT
Aspire Systems (former Goyello)	IT	Fineos	IT
Asseco Data Systems	IT	First Flight Support	IT
Astek	IT	FujiFilm Europe Business Service	SSC
Atena (Usługi Informatyczne i Finansowe)	IT	Gdańskie Centrum Informatyczne	IT
Atos Polska	IT	Gdańskie Centrum Usług Wspólnych	SSC
Avaus Marketing Innovations Poland	IT	Geoban (Santander Group)	SSC
Bank Millennium	SSC	GetResponse	IT
Banqsoft	IT	Gibbs Hybrid	IT
Bayer Service Center Gdańsk	SSC	Hapag-Lloyd	IT
Benetel	R&D	Hempel Paints Poland	SSC
BEST	SSC	HIQ	IT
Blue Media	IT	HK Finance	BPO
Blue Soft	IT	HMS Assistance	SSC
Blue Soft	IT	Holte Software	IT
Bluestone (former Webon)	IT	Huber & Suhner	SSC
BPH	SSC	IHS Markit	IT
Call Center Inter Galactica	BPO	In4mo	R&D
CCC (Competence Call Center)	BPO	Intel Technology Poland	R&D
Ciklum	IT	Intitek	IT
Cognizant Technology Solutions	BPO	Itmagination	R&D
Comarch	IT	JazzPay	IT
Damen Engeenering Services Gdańsk	R&D	Jeppesen Poland (Jeppesen a Boeing Company)	R&D
Deltamarine Engeenering	R&D	JIT Team	IT
Develocraft	IT	JUUL Labs	SSC
DGC Polska (Iver)	IT	Kainos Software Poland	IT
Diverse Consulting Group	IT	Kaliop	IT
DNV GL	SSC	Kemira Business Service Center Gdańsk	SSC
Dom Finansowy QS	SSC		

COMPANY	TYPE OF OPERATION	COMPANY	TYPE OF OPERATION
Laureate Online Education	SSC	Seagull Maritime AS	IT
Let's Deliver	IT	Seargin	IT
Lotos Centrum Usług Wspólnych (Grupa LOTOS S.A.)	SSC	SentiOne	IT
LPP	SSC	SIEM Ship Management (former Star Reefers)	SSC
Lufthansa Systems Poland	IT	Sigarden	IT
Luxoft	IT	Signia Media Technologies AB (former Adtoma)	IT
MacGregor Poland	CoE	Sii	IT
Madkom	IT	Simployer Tech Polska (Infotjenester)	IT
Maersk Drilling	SSC	Smart4aviation (incl. AzimuthIT)	IT
Manpower Group Solutions	BPO	SocialCEE	IT
Metsa Group Services	SSC	Soldevelo	IT
Movo	IT	Solwit	IT
Mowi	SSC	Sony Pictures GBS	CoE
Multinor	BPO	Spartez	IT
Nearshoring Solutions	IT	Speednet	IT
Neoteric	IT	SPN Tech	IT
Nest Bank	SSC	Staples Solutions	SSC
Nippon Seiki (Europe) BV	R&D	State Street Bank	CoE
Nordea Bank AB Oddział w Polsce	IT	Swarovski Global Business Services	SSC
Nordic Services	SSC	Synopsys	R&D
OKE Poland	IT	TeleMobile Sp. z o.o.	R&D
ONE Ocean Network Express (former MOL Europe CSU)	SSC	TF Bank	IT
Onwelo	IT	TF Bank	IT
PGS Software	IT	Thomson Reuters	CoE
PKO	SSC	ThyssenKrupp Group Services Gdańsk	SSC
Playsoft	IT	Transcom Worldwide Poland	BPO
Polska Press Internet (część grupy Polska Press)	IT	Travactory	IT
Postdata	IT	Ulstein Poland	R&D
Powel AS	IT	Ulstein Poland	BPO
PPG	SSC	Unifeeder	SSC
PwC Advisory Centre of Excellence	CoE	United Technologies (UTC Fire & Security Polska)	IT
Qloc	IT	UST- Global	IT
Quad Graphics Europe	IT	UXPin	IT
Refinitiv (former Thomson Reuters Financial & Risk)	CoE	Wipro IT Services Poland	BPO
Renau Research and Development	IT	Wirtualna Polska	IT
Ricoh Business Service Centre	SSC	WNS Global Services Poland	BPO
Riks TV	IT	Wolters Kluwer	IT
Scalac	IT	Xtrack	IT
Schibsted	IT		

Year of inauguration in Tricity

Count	Year
8	2019
9	2018
17	2017
10	2016
13	2015
20	2014
7	2013
14	2012
6	2011
4	2010
8	2009
5	2008
3	2007
5	2006
4	2005
2	2004
2	2003
2	2002
4	2001
13	1989–2000

France **5**

Netherlands **6**

Canada **1**

Germany **7**

Poland **47**

USA **28**

UK **7**

Sweden **7**

Finland **8**

Austria **2**

Belgium **1**

Switzerland **2**

Denmark **5**

Spain **1**

Ireland **3**

India **4**

Iceland **1**

Japan **4**

Norway **15**

Singapore **1**

Ukraine **1**

Country of origin

'Salaries
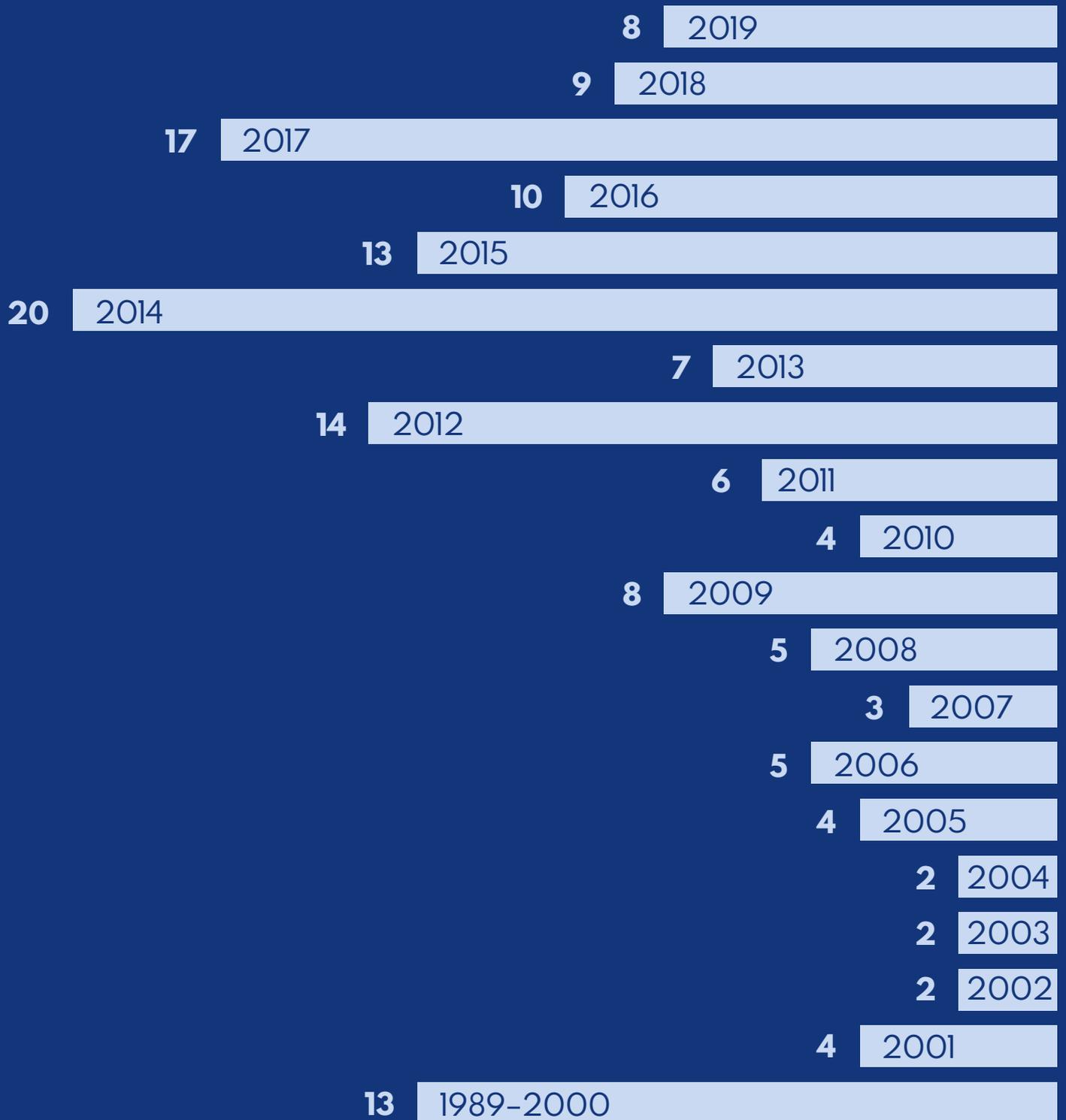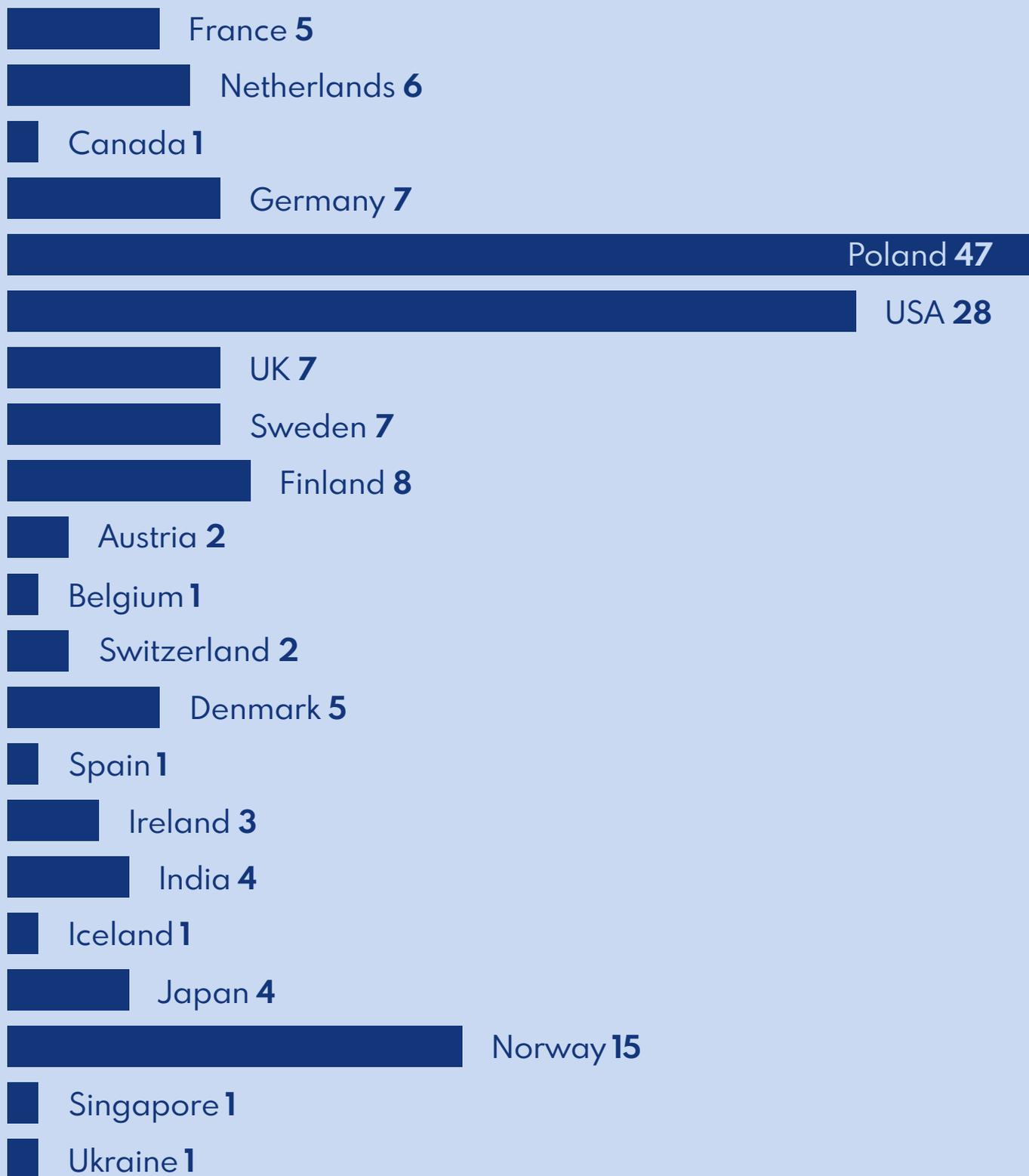
Call Center*
Jobs - English speakers (PLN gross)

POSITION	MINIMUM	MAXIMUM
Junior Consultant	4 200	5 000
Consultant	4 700	5 500
Senior Consultant	5 700	7 000
Team Leader	7 000	9 000
Supervisor	9 000	12 000
Manager	12 000	15 000

IT**
Jobs - English speakers (PLN gross)

POSITION	MINIMUM	MAXIMUM
Net Developer	6 000	25 000
C++ Developer	5 000	20 000
Help Desk	4 000	14 000

Gross average monthly salary in PLN in Tricity

5 563.4

Accounts Payables
/ Accounts Receivables*

Jobs - English speakers (PLN gross)

POSITION	MINIMUM	MAXIMUM
Junior accountant	4 700	5 500
Accountant	5 000	6 000
Senior accountant	6 000	7 800
Team Leader	8 000	9 500
Supervisor	10 000	12 000
Manager	14 000	18 000

General Ledger*

Jobs - English speakers (PLN gross)

POSITION	MINIMUM	MAXIMUM
Junior accountant	5 000	5 700
Accountant	5 300	6 300
Senior accountant	6 500	8 500
Team Leader	8 500	11 000
Supervisor	10 000	14 000
Manager	13 000	18 000

Source: *Kelly Services / ** Devire

'Culture, entertainment, recreation

11 cinemas

7 theatres

28 shopping malls

43 museums

24 festivals

Selected business, cultural and sports events

· Amberif
· Balt EXPO
· Baltic Sail Gdańsk
· European Forum for New Ideas
· Internet Women's Festival
· FETA Festival
· Gdańsk Hoists the Music Festival
· Gdynia Businessplan
· Globaltica
· Infoshare
· St. Dominic's Fair
· Colossuses
· Ladies' Jazz Festival
· Mozartiana
· Open'er Festival
· Red Bull Air Race
· Smart Metropolia
· Social Media Convent
· Solidarity of Arts
· Soundrive Festival
· Technicon-Innovations
· TRAKO

17 hospitals

Conference facilities

- Amber Hotel
- BEST WESTERN Bonum Hotel
- BEST WESTERN Plus Arkon Park Hotel
- BEST WESTERN VillaAqua Hotel
- The AmberEXPO Exhibition and Congress Center
- Dom Muzyka (Musicians' Home)
- Gdańsk Science and Technology Park
- Almond Business & SPA Hotel
- Antares Hotel
- Artus Hotel
- Bartan Hotel
- Bayjonn Hotel
- Blick Hotel
- Dal Hotel
- Dom Marynarza Hotel
- Dwór Oliwski Hotel
- Europa Hotel
- Focus Hotel
- Galion Hotel
- Gdańsk & Hotel Gdańsk Yachting Hotel
- Grano 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 Hotel
- Progres Event & Conference
- Q Hotel Grand Cru
- Stara Wędzarnia (Old Smokehouse)
- Stary Maneż
- Villa Eva
- Villa Pascal
- Villa Sentoza

85 hotels including:

11 five-star *****
15 four-star ****
45 three-star ***

44 fairs

ʼNotes

Address to the Investor Assistance Centre:

Focus on Tricity
prepared by:

Invest in Pomerania

We care more

Pro Progressio

Invest in Pomerania
Olivia Business Centre – Olivia Six
Aleja Grunwaldzka 472D
80-309 Gdańsk

☎ +48 (58) 32 33 256
✉ office@investinpomerania.pl

www.investinpomerania.pl

Pro Progressio - foundation supporting growth and promotion of outsourcing industry in Poland. The foundation cooperates with the public and private sector as well as with the international organisations operating in the outsourcing sector. Pro Progressio is a publisher of outsourcing sector media that is with OutsourcingPortal and *Outsourcing&More* magazine.

Pro Progressio manages the Pro Progressio 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.

Fundacja Pro Progressio   Tel: +48 22 213 02 45
ul. Dziekońskiego 1   E: info@proprogressio.pl
00-728 Warszawa   W: www.proprogressio.pl

In cooperation with:

Invest in Pomerania
We care more

Polish Investment
& Trade Agency
PFR Group

devire.

Kelly

savills

RIPOSTA

Sources: Pro Progressio, Main Statistical Office, Invest in Pomerania, Kelly Services, Devire and Savills.