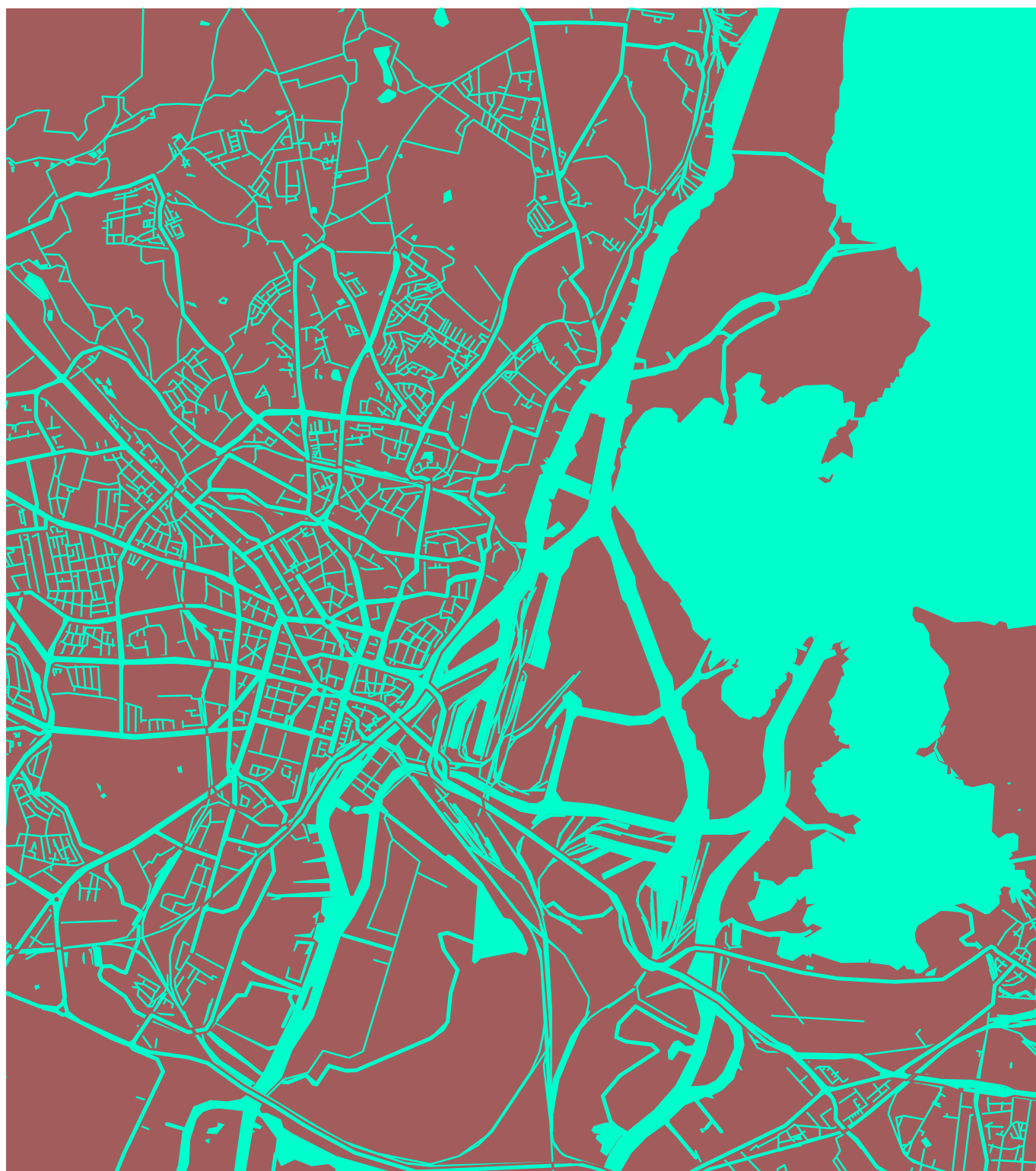


FOCUS ON

Created by **Pro Progressio**

Szczecin



4/ City

5/ Education

6/ Transport

12/ Real Estate

14/ Business

18/ Salaries

20/ Culture,
entertainment,
recreation



Jan Kamoji-Czapiński
Director, Centre for Strategic Investments, PAIH

The Polish business services sector is currently going through a fundamental shift towards more complex and higher quality processes. Looking at the enquiries received by Polish Investment and Trade Agency, we can observe that an increasing number of investors active on the Polish market aims to establish

global BSS hubs – clusters of highly specialized BSS companies with a global reach. This transformation shows the maturity of the Polish BSS market, with increasingly complex types of services offered in the country's major centers. Such projects require staff with appropriate skills, including fluency in foreign languages other than just English. Equally important is the access to the required resource of talent, which becomes more and more challenging, especially in the traditional BSS locations. We are glad that there is no longer a need to convince investors to look for talent also in smaller, dynamically developing locations that offer good access to needed specialists.

The transformation described above can clearly be noticed when looking at the structure of Szczecin's BSS market. Among nearly 6,000 people employed in the city's business services centers, as many as 45% find employment in IT centers (up to a quarter more than the national average). Furthermore, Szczecin stands out in terms of presence of enterprises involved in the development of software

for the automotive industry. The sector is additionally aided by the extensive level of cooperation between academic units and locally operating IT companies. A perfect example can be the "GlobalLogic Automotive Lab" created in 2018 at the West Pomeranian University of Technology.

Among other important factors attracting investors to Szczecin, one can also list the unique location – proximity to Berlin (1.5 hour drive) and developed communication routes, as well as excellent knowledge of foreign languages among local staff. In particular, it is considerably easier to find candidates who speak German and Nordic languages. It is companies from the north of Europe that dominate in terms of employment in the BSS sector in Szczecin. Over 30% of all employees in the industry work for companies from Nordic countries.

Taking into account the expected deepening trend of the city's specialization and the continuing growth of smaller centers, we hope for the further development of the BSS sector in the capital of West Pomerania.



Wiktor Dóktór
CEO, Pro Progressio

Szczecin, appeared on the Polish map of BSS locations several years ago. It is here that IT companies and the call contact center started the development of the business services sector. The geographical location, close to the German market is conducive to the development of cooperation between Polish and German companies on the one hand, and on the other hand, to attract staff with knowledge of the German language.

The last two decades have also been the time for the development of office infrastructure in the capital of the West Pomeranian Region. Buildings such as Posejdon or Oxygen are the great examples of Szczecin office real estate industry. There are many

more offices in the city, and in mid-2020 nearly 200,000 square meters were available to tenants. The real estate market has not stopped there and new office space is under construction, as well as further plans.

Human resources are an important element of the business environment in every city. Szczecin is a city of young and experienced people. The salary level here is within the Poland's industry average if we take into account financial, multi-lingual and IT positions.

I invite you to read *Focus on Szczecin* – Report about the business environment of the modern business services sector in the capital of the West Pomeranian Voivodeship.

300,6 km²

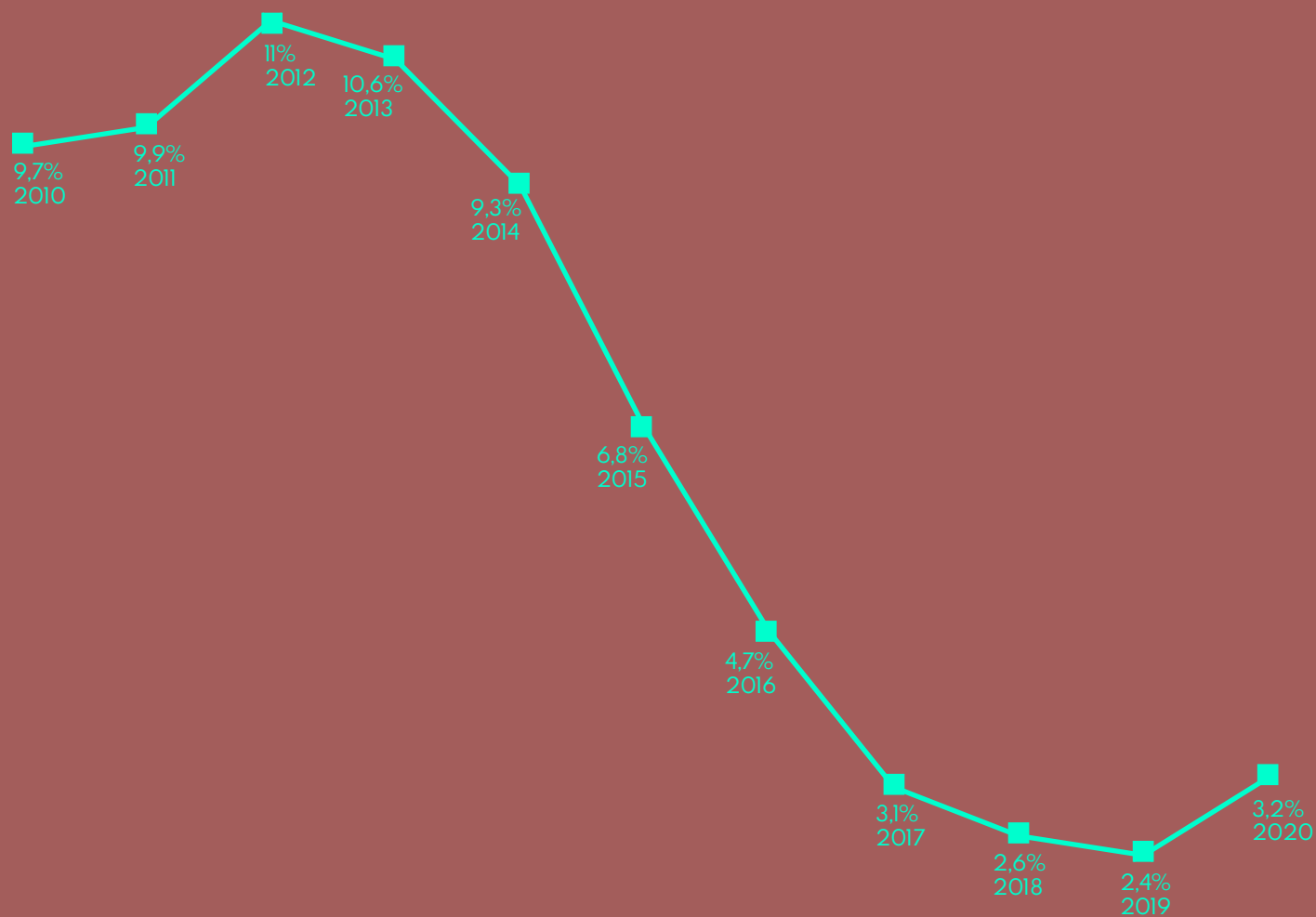
Town area

401 900

Population

750 000

Population of the Szczecin Agglomeration



Unemployment rate

142



kindergartens

58 public kindergartens

84 private kindergartens

12



universities

5 public universities

7 private universities

7 677 32 857

Primary schools:

75 28 792

Technical schools:

12

High schools:

29 1 960 6 529

	SUBJECTS*	
2 105	philology (foreign languages)	349
7 634	administration, business and law	1 770
2 906	IT/ICT	378
4 528	engineering and technology	1 057
1 212	logistics	289
2 393	architecture and construction	712

Graduates

Students

* data for Zachodniopomorskie region

/Transport


 **12** car rentals

 **21** taxi companies

2 433 taxis

PLN 5 initial charge

PLN 3 cost per 1 km

 **10** tram lines

 **78** bus lines

64 day bus lines

14 night bus lines



Public transport tickets

PLN 2 normal ticket price

PLN 12 one-day ticket price

PLN 100 monthly ticket price








 **742** city bikes

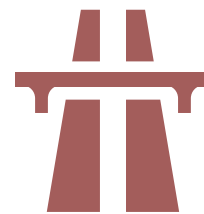
137,3 km length of bicycle routes

87 city bikes stations

PLN1 / h rental cost (20 min free)

Distance from Szczecin to other cities

Warsaw	565 km
Bydgoszcz	258 km
Poznań	261 km
Lublin	733 km
Łódź	480 km
Katowice	576 km
Kraków	656 km
Kielce	624 km
Rzeszów	830 km
Gdańsk	343 km
Wrocław	378 km
Białystok	755 km
 Berlin	152 km
 Hamburg	409 km
 Prague	499 km
 Minsk	1 098 km
 Kiev	1 341 km
 Moscow	1 825 km
 Vilnius	965 km



Roads











1 highway

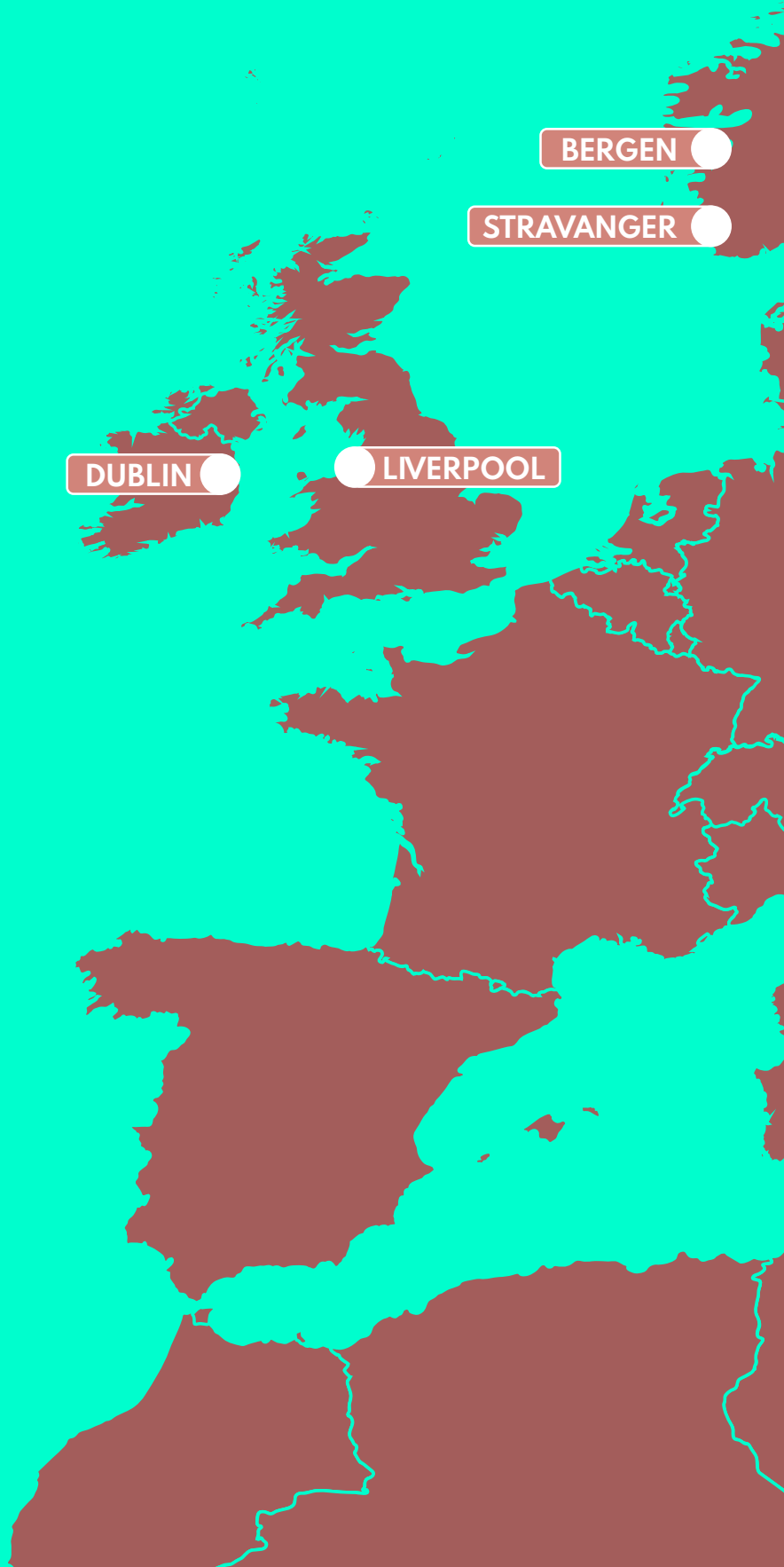
2 express ways

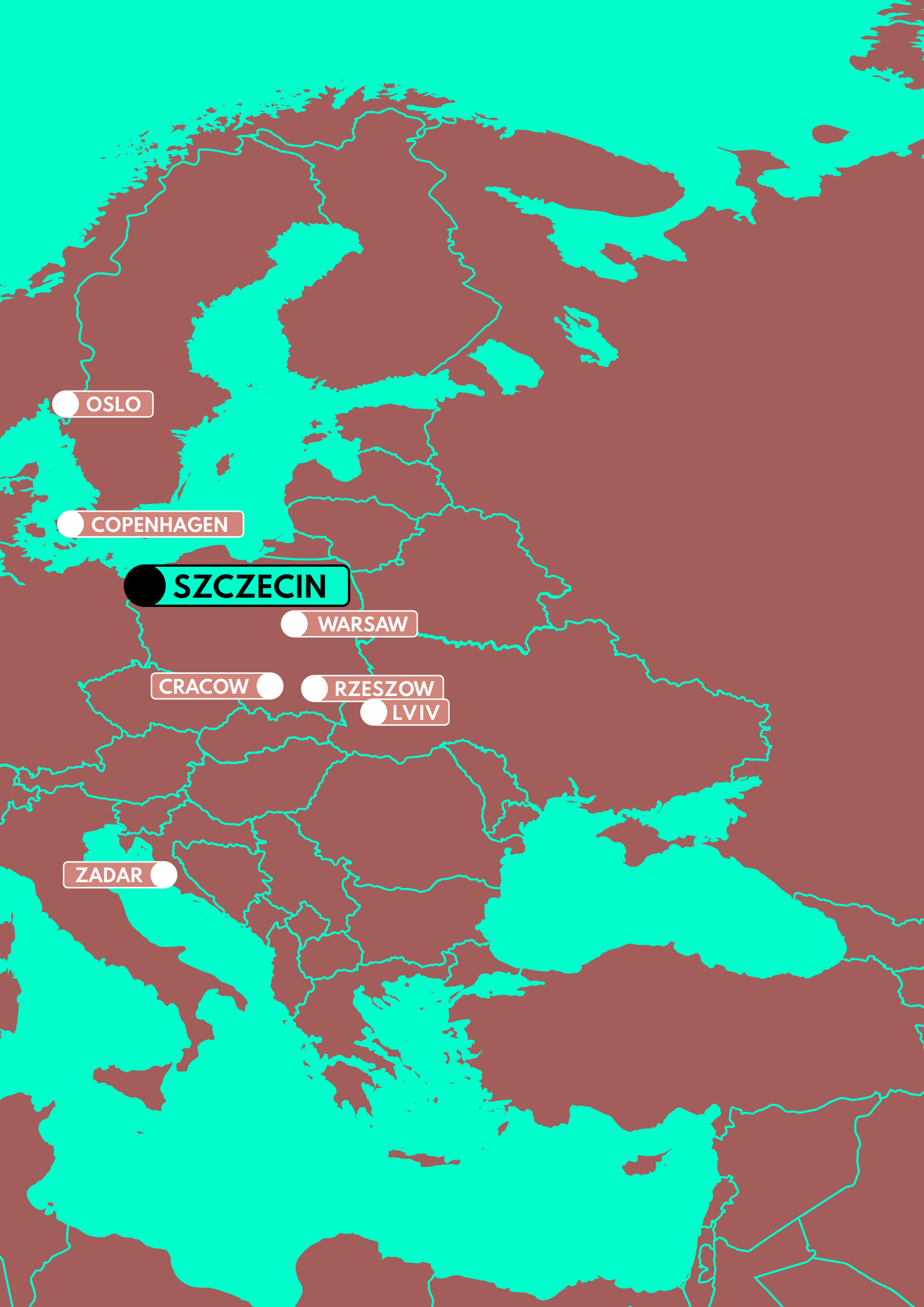
3 national roads

2 regional roads

Szczecin-Goleniów Airport

-  Bergen
-  Dublin
-  Copenhagen
-  Cracow
-  Liverpool
-  Lviv
-  Oslo Gardermoen
-  Oslo Torp
-  Rzeszow
-  Stavanger
-  Warsaw
-  Zadar





OSLO

COPENHAGEN

SZCZECIN

WARSAW

CRACOW

RZESZOW

LVIV

ZADAR

Distance from the Main Szczecin Railway Station



45 min



Szczecin-Goleniów Airport



15 min



SERVICE INTER-LAB Center for the Transfer of Knowledge and Innovation for Service Sector



12 min



Szczecin City Hall

35 min



10 min



The Regional Centre for Innovation & Technology Transfer



16 min



Agency for the Development of the Szczecin Metropolis

55 min



18 min



Technopark Pomerania

56 min



11 min



University of Szczecin

32 min



8 min



Old Town

18 min



12 min



Maritime University

20 min



8 min



Łasztownia

15 min



12 min



WSB University

44 min



9 min



Mieczysław Karłowicz Concert Hall

19 min



19 min



The West Pomeranian Business School



7 min



Pionier cinema

17 min



8 min



West Pomeranian University of Technology

24 min



11 min



Pleciuga Puppet Theater

33 min



10 min



Pomeranian Dukes' Castle

18 min



15 min



Museum of Technology and Transport

50 min



9 min



The National Museum

16 min



14 min



Kasprowicz Park

47 min



9 min



Dialogue Center Przelomy of the National Museum

19 min



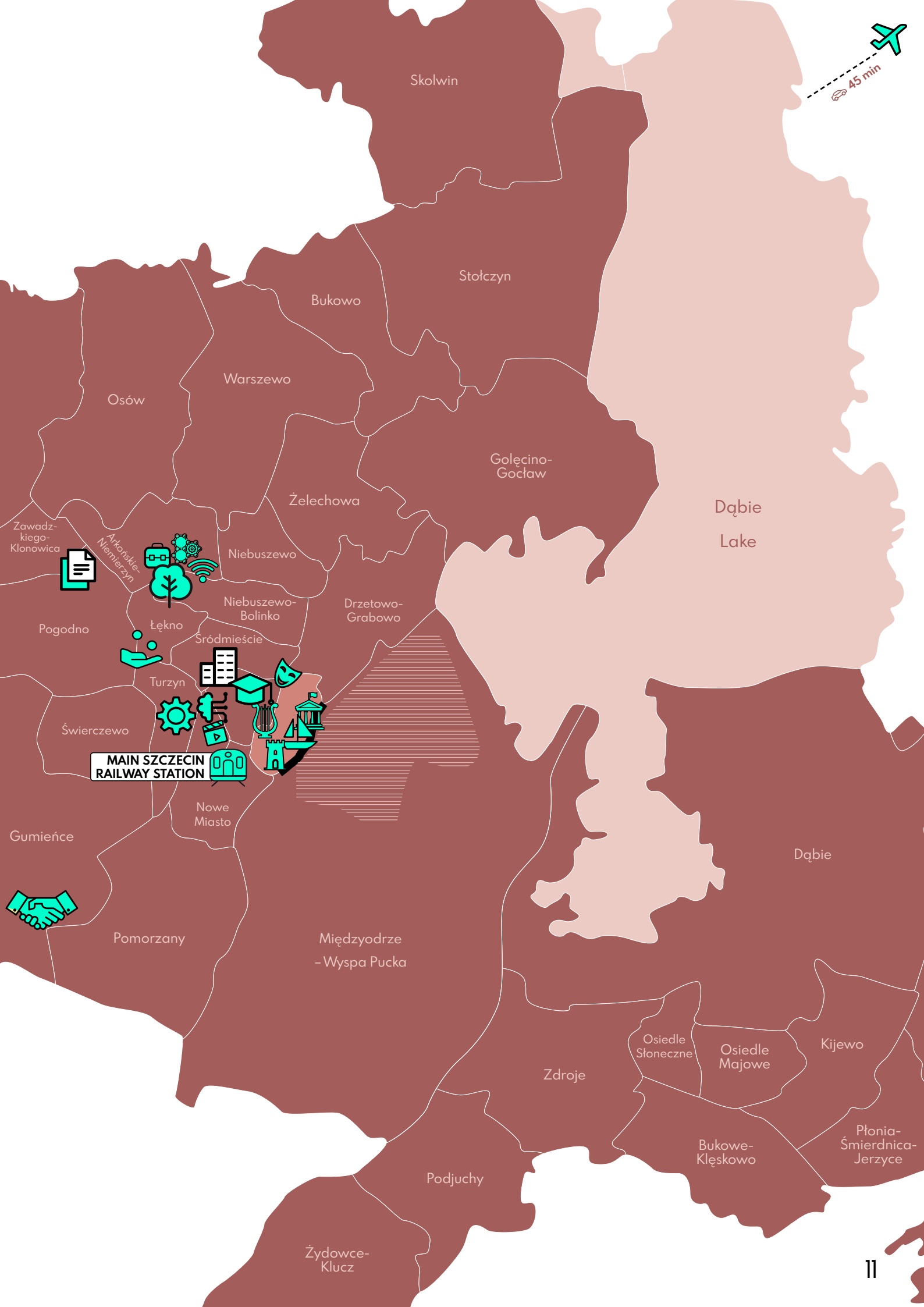
8 min



Chrobry embankments

21 min





Skolwin

45 min

Stołczyn

Bukowo

Osów

Warszewo

Gołęcino-Goćław

Dąbie
Lake

Żelechowa

Niebuszewo

Zawadz-
kiego-
Klonowica

Arkonia-
Niemierzyn

Pogodno

Łęčno

Niebuszewo-
Bolinko

Drzetowo-
Grabowo

Sródmieście

Turzyn

Świerczewo

**MAIN SZCZECIN
RAILWAY STATION**

Nowe
Miasto

Gumieńce

Dąbie

Pomorzany

Międzyodrze
- Wyspa Pucka

Osiedle
Słoneczne

Osiedle
Majowe

Kijewo

Zdroje

Bukowe-
Kłęskowo

Płonia-
Śmierdnica-
Jerzyce

Podjuchy

Żydowce-
Klucz

Offices

Total existing A/B+ Class office space	180 800 sq m
Total A/B+ Class office space under construction	28 300 sq m
Total A/B+ Class office space planned	36 000 sq m
A/B+ Class office spaces	37
A/B+ Class office spaces under construction	2
Planned A/B+ Class office spaces	4
Minimum rent in A/B+ Class	8 EUR / sq m / month
Maximum rent in A/B+ Class	14 EUR / sq m / month
Średnie opłaty serwisowe w klasie A/B+	15 PLN / sq m / month

Selected office spaces

BUILDING	ADDRESS	OWNER	EXISTING SPACE
Baltic Business Park	1 Maja 38/39	Baltic Business Park Sp. z o.o	19 900 sq m
Piastów Office Centre	al. Piastów 30/al. Bohaterów Warszawy 69	Realkapital Szczecin II Sp. z o.o	18 600 sq m
Posejdon	Plac Bramy Portowej 1	Porto Sp. z o.o.	18 100 sq m
PAZIM	Pl. Rodła 8	PAZIM Sp. z o.o.	14 700 sq m
Oxygen	Malczewskiego/Al. Wyzwolenia	EPP	13 100 sq m
Lastadia Office	Zbożowa 4	Greenstone Asset Management	11 500 sq m

Warehouses

Total existing warehouse space	735 200 sq m
Total warehouse space under construction	76 500 sq m
Total planned warehouse space	>200 000 sq m
Prime rent in warehouses (city and environs)	3.30–3.80 (headline, EUR /sq m /month)

Selected warehouses

BUILDING	ADDRESS	LANDLORD	EXISTING SPACE	SPACE UNDER CONSTRUCTION	PLANNED SPACE
Panattoni BTS Szczecin Amazon	Kołbaskowo	Panattoni / Vestas Investment Management	161 000 sq m	-	-
Panattoni Park Szczecin	Szczecin / Załom	Panattoni / Panattoni & JV Partners	154 400 sq m	26 500 sq m	40 000 sq m
Goodman BTS Szczecin Zalando	Gryfino	Goodman / DWS	130 000 sq m	-	-

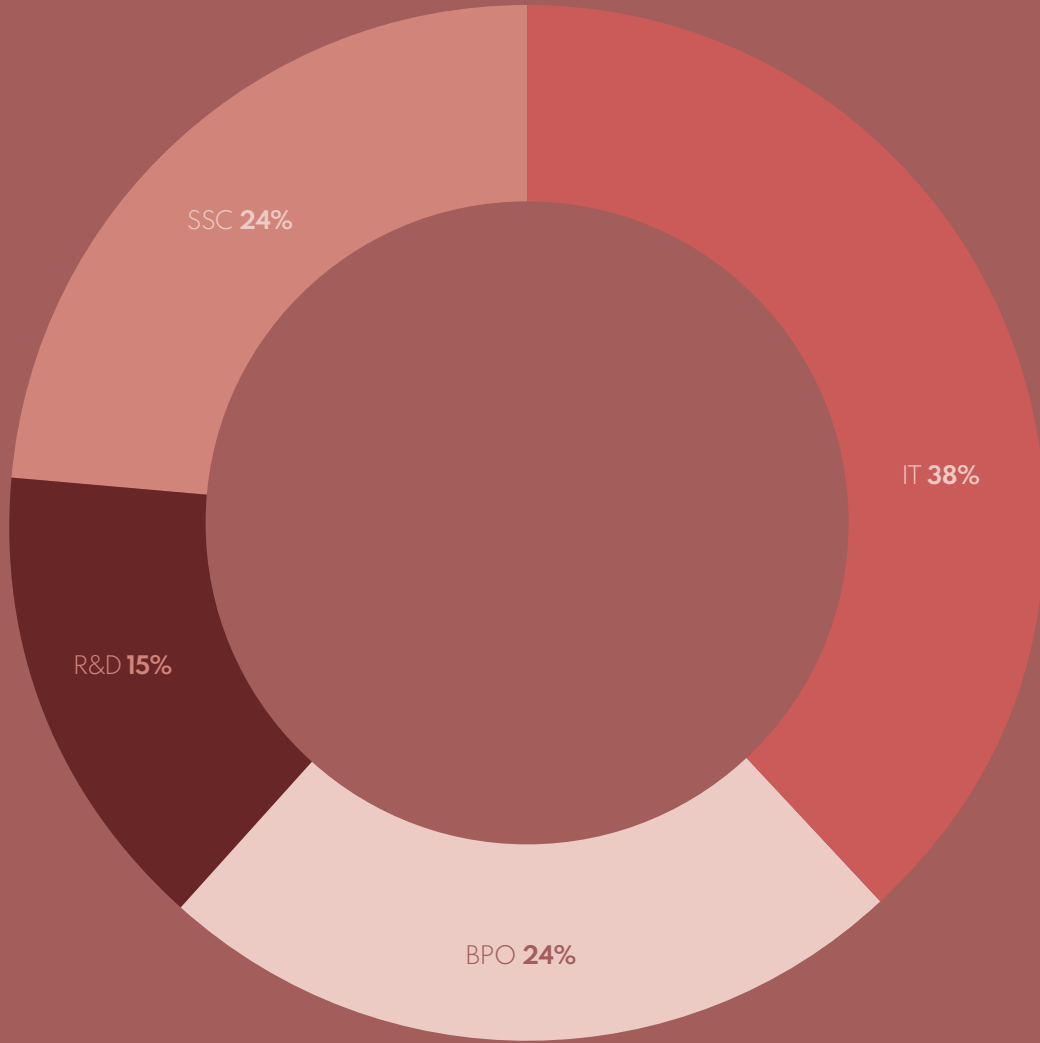
Shopping malls

Number of shopping malls	14
Total existing space	326 000 sq m
Total planned space	20 000 sq m
Total empty space	3 200 sq m
Average rents in prime spaces	EUR 45–55 / sq m / month

Selected shopping malls

BUILDING	ADDRESS	DEVELOPER	EXISTING SPACE
Galaxy	al. Wyzwolenia 18–20	EPP	60 000 sq m
Galeria Kaskada	al. Niepodległości 36	ECE	42 000 sq m
Auchan Kołbaskowo (+Decathlon & Leroy Merlin)	Ustowo 45, Kołbaskowo	Ceetrus	34 000 sq m
Ster	Ku Słońcu 67	Cromwell Property Group	32 000 sq m
Outlet Park	Struga 42	EPP	28 400 sq m

Source: JLL



Type of operation

COMPANY	TYPE
Arvato Services	BPO
Asseco Data Systems	IT
AVID Technology	IT
AVIDA Sp. z o.o.	SSC
BL Stream	IT
BrightOne	BPO
Coloplast Business Centre	SSC
Consileon	IT
Convergys (before Stream Global Services)	BPO
CSP Customer Services Polska Sp. z o.o.	BPO
DGS Business Services Sp. z o.o. (before Oticon)	SSC
Diebold Nixdorf	SSC
GaveKal Analytics (now Macrobond Financial Polska Sp. z o.o.)	R&D
Genpact	BPO
GlobalLogic	IT
Gryftec	R&D
Heuthes Sp. z o.o.	IT
Huuuge Games Sp. z o.o. (before Gamelion)	R&D
Macrobond Financial Polska Sp. z o.o.	SSC
Meelogic Consulting Polska Sp. z o.o.	
Metro Services	SSC
Mobica	IT
NCDC	BPO
Object Connect	IT
Orad	R&D
Rec Global (now Global Logic)	IT
Red Sky	IT
Sagra Technology	IT
Salling Group (before Dansk Supemarked)	SSC
Squiz Poland	BPO
Teonite Sp. z o.o. Sp. k.	BPO
Tieto Poland	R&D
Umlaut Sp. z o.o.	
Unicredit Business Integrated Solutions	SSC
UniqueSoft Complex IT	IT
Unizeto (now Asseco Data Systems)	IT

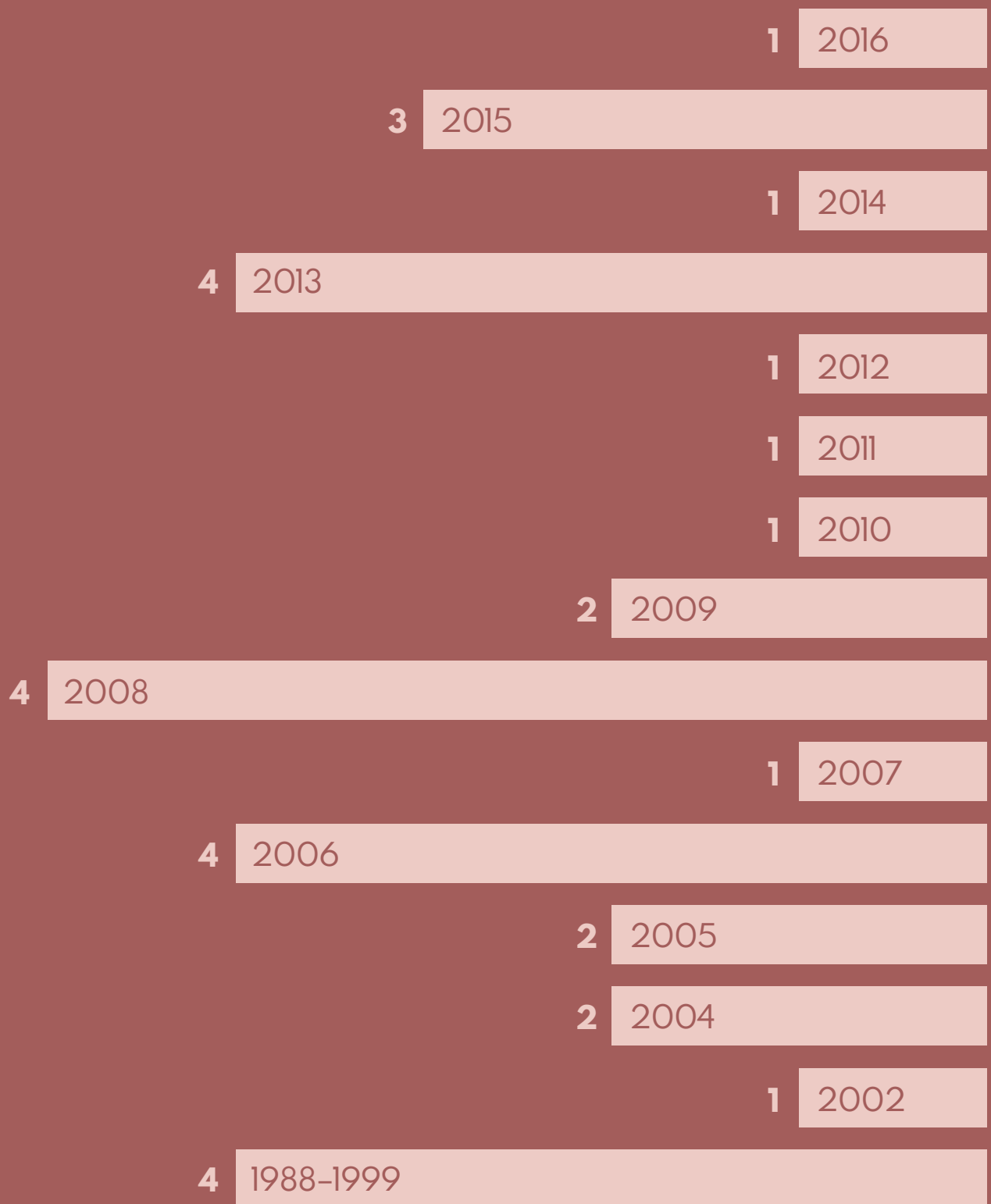
Outsourcing centres using foreign languages

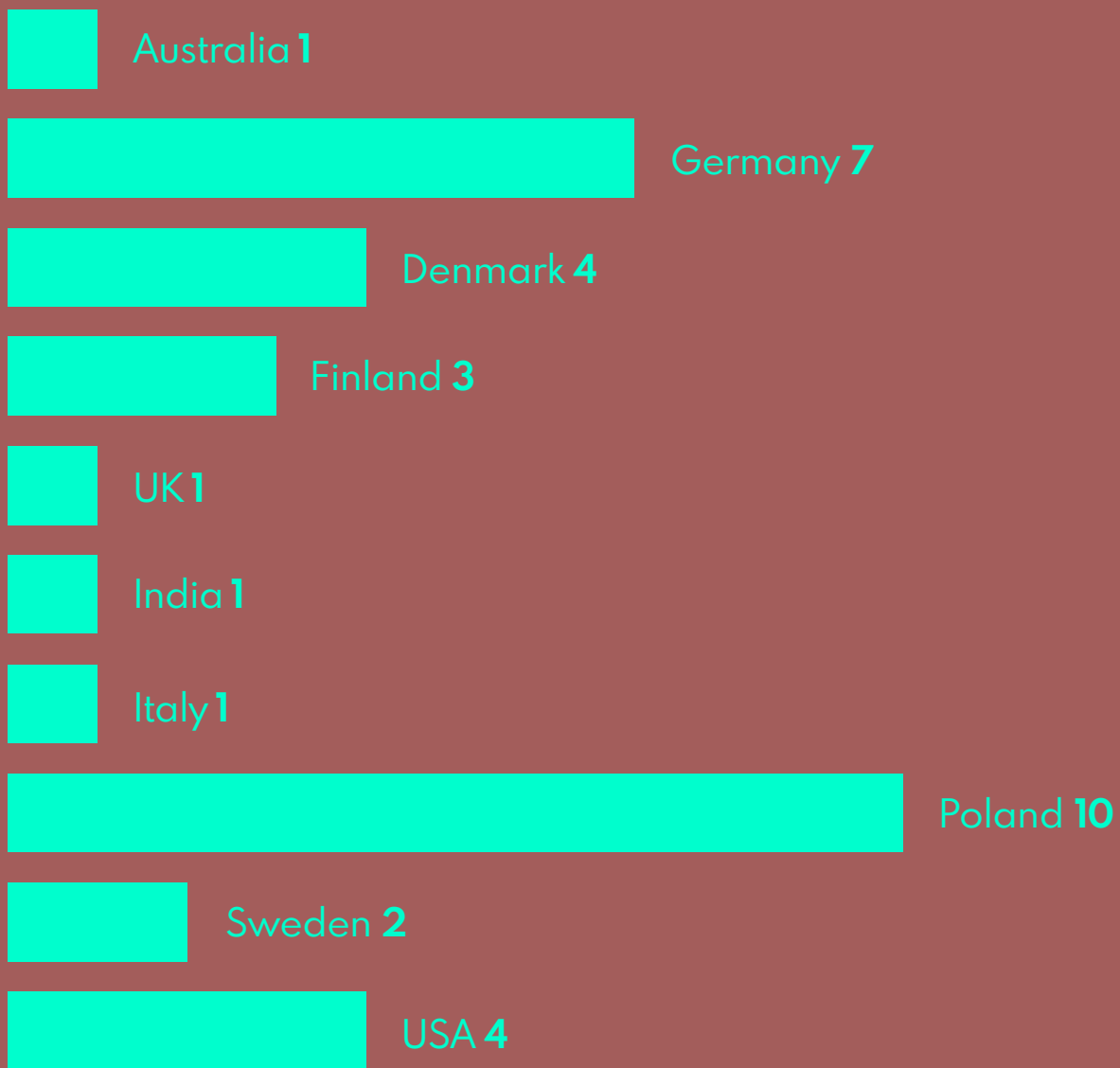
 Polish: 34	 Slovak: 2
 English: 33	 Dutch: 1
 German: 19	 Portuguese: 2
 Spanish: 3	 Bulgarian: 1
 French: 5	 Romanian: 2
 Italian: 4	 Croatian: 1
 Russian: 6	 Serbian: 1
 Hungarian: 4	 Turkish: 1
 Ukrainian: 3	 Japanese: 1
 Danish: 1	 Arabic: 1
 Czech: 3	

Institutions supporting entrepreneurship

- Agency for the Development of the Szczecin Metropolis
- Szczeciński Fundusz Pożyczkowy
- Szczecin Science and Technology Park – Technopark Pomerania
- The Regional Centre for Innovation & Technology Transfer
- SERVICE INTER-LAB Center for the Transfer of Knowledge and Innovation for Service Sector
- West Pomeranian Center of Advanced Technologies
- International Hereditary Cancer Center and Department of Genetics and Pathomorphology of the Pomeranian Medical University
- Center of Molecular Biology and Biotechnology
- Center of New Medical Technologies
- Centre for Bioimmobilization and Innovative Packaging Materials
- Nanotechnology Didactic and Research Center
- OSTOJA Training and Research Center in the Field of Renewable Energy
- “Zielona Chemia” Cluster
- The Maritime Cluster of Western Pomerania
- “Metallic” Metal Cluster
- Construction Glass Processors Cluster
- Cross-border Szczecin–Berlin–Baltic Water Route Cluster
- West Pomeranian Maritime Cluster
- Western Pomerania ICT Cluster
- iSynergia West Pomeranian Medical Cluster

Year of inauguration in Szczecin and their number





Country of origin

Call Center

Jobs - English speakers (PLN gross)



POSITION	MINIMUM	MAXIMUM
Junior Consultant	3 000	4 000
Consultant	3 500	5 200
Senior Consultant	4 000	6 000
Team Leader	6 000	8 500
Supervisor	7 000	9 000
Manager	9 000	12 000

IT

Jobs - English speakers (PLN gross)



POSITION	MINIMUM	MAXIMUM
Net Developer	8 000	13 000
C++ Developer	8 000	14 000
Help Desk	5 500	8 000

Gross average monthly salary in PLN in Szczecin

5260.56

Accounts payables / Accounts Receivables

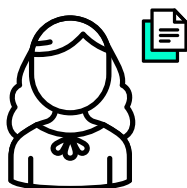
Jobs – English speakers (PLN gross)



POSITION	MINIMUM	MAXIMUM
Junior Accountant	3 200	4 000
Accountant	4 000	6 000
Senior Accountant	5 000	7 000
Team Leader	7 500	10 000
Supervisor	8 500	11 000
Manager	11 000	14 000

General Ledger

Jobs – English speakers (PLN gross)



POSITION	MINIMUM	MAXIMUM
Accountant	4 500	6 700
Senior Accountant	6 000	8 500
Team Leader	7 000	11 000
Supervisor	8 500	12 000
Manager	11 000	13 000

Source: Antal

/Culture, entertainment, recreation

5  cinemas

5  theatres

8  museums

2  festivals

Conference facilities

- Posejdon
- Radisson Blu Hotel, Szczecin
- Stara Rzeźnia
- Dana Hotel
- Technopark Pomerania
- Mieczysław Karłowicz Concert Hall in Szczecin
- Park Hotel
- Novotel Szczecin Centrum
- Vulcan Hotel
- Grand Park Hotel
- Campanile Hotel
- Trafostacja Sztuki

31  hotels including:

8 four-star hotels ****

11 three-star hotels ***

14  shopping malls

12  hospitals

Examples of business, cultural and sports events

- The Scandinavian days
- The Polish-German Cooperation Days
- The Tall Ships 'Races
- IT in Automotive conference
- The Sea Days
- Pekao Szczecin Open
- Investors Golf Cup Szczecin
- The PYROMAGIC International Fireworks Festival
- International Street Artists Festival
- Piknik nad Odrą
- Kontrapunkt - The Small Form Theaters Overview



Agencja Rozwoju
Metropolii
Szczecińskiej Sp. z o.o.



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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.

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