

FOCUS ON

Created by **Pro Progressio**

Lublin



April 2019



Pro Progressio

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20/ Culture,
entertainment,
recreation



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

Lublin belongs to one of the most thriving and perspective locations for advanced business services in the East of Poland. The sector has been developing here fast over the last few years mainly due to availability and quality of human resources as well as an attractive offer of modern office space.

Lublin is a strong academic centre, the largest in Eastern Poland.

More than 50 percent of the population are below the age of 40. There are 9 universities providing not only highly qualified staff but also the scientific and research base available for the investors' needs. Every year the universities release over 18,000 graduates. Out of 62,000 students, over 10% are the foreigners who came to Lublin from 100 countries. What is more, information technology, being so much in demand by the services sector, is the second most popular field of study in Lublin.

The investment attractiveness of Lublin has been acknowledged in the latest ranking of "fDi Polish Cities of the Future 2019/2020" listing Lublin 2nd among big cities in the category of cost effectiveness and 6th in terms of Human Capital and Lifestyle.

Apart from human resources, Lublin attracts investors with relatively low costs of the office space compared to the main centres in Poland. The City records one of the most dynamic increases of the office space in Poland which gives the City competitive advantage over other centres in Poland where finding an attractive office location within a short time remains a challenge.

The City's transport accessibility is another advantage. Thanks to the completion of construction works on S17 expressway, Warsaw can be reached within an 1.5 hour drive. The Lublin airport, one of the fastest expanding airports in Europe, ensures connections to a number of the European countries and Israel as well as fast connections with Warsaw and via Warsaw with the entire world.

The successful performance of Lublin Subzone, part of the Euro-Park Mielec Special Economic Zone which has acquired 70 companies with total investments of 1.9 bn PLN proves that Lublin is an attractive investment location.

Polish Investment and Trade Agency has been observing increasing interest in locating business services centres in Eastern Poland due to, among others, the highest level of public aid available in this part of the country. A growing number of investors from the Agency's portfolio take into account this vital aspect and considers Lublin as an alternative location to Warsaw, where obtaining public support such as, for example, investment grant is far more limited.



Wiktor Doktor
CEO, Pro Progressio

For many years already, Lublin has been on the path of dynamic development of many business fields, including the BSS sector. The city's attractiveness has already been noticed by IT companies dealing with software development, financial and accounting centers as well as the Call Contact Center industry.

Dynamic business development translates into a demand for modern office space every year. Tens of thousands of square meters of new and modern office space, local developers and international agencies dealing in office rental services make Lublin being analyzed by a growing number

of domestic and international investors. Only in the last two years, the offices of giants such as PwC and Capgemini have been opened in Lublin.

Considering the availability of employees, city infrastructure, educational profiles at local universities and office facilities, Lublin is becoming one of the most important business centers on the territory of Eastern Poland, thus increasing its importance for the outsourcing industry and modern business services.

You are welcome to Lublin! I invite you to get familiar with *Focus on Lublin* Report!

147,5 km²

Town area

339 770

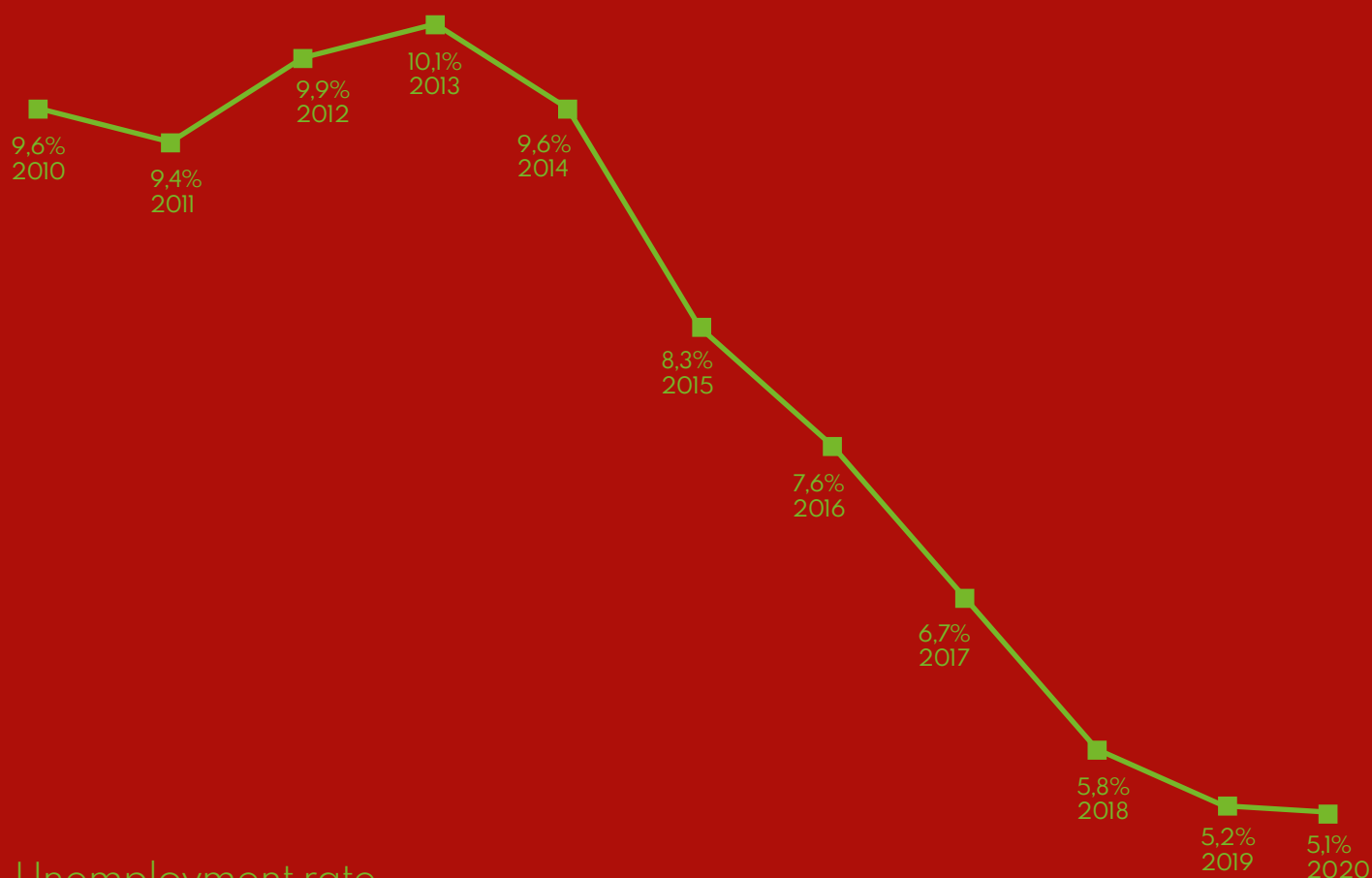
Population

712 000

Population of Greater Lublin

2 261 ha

Recreational green area



153



Kindergartens

65 public kindergartens

88 private kindergartens

9



Universities

5 public universities

4 private universities

16 323

61 588

6 352 (foreign students)

Primary schools:

68

27 118

Technical schools:

15

High schools:

37

3 046
 9 800



SUBJECTS



2 903*	philology (foreign languages)	807*
11 541*	administration, business and law	3 415*
4 376*	IT/ICT	894*
5 689*	engineering and technology	2 228*
2 800*	architecture and construction	781*

Graduates

Students

*data for Lubelskie region

/Transport

 **18** car rentals

 **150** carsharing cars

 **11** taxi companies

1 420 number of taxis

PLN 7 initial chargey

PLN 2 cost per 1 km

 **14** trolleybus lines



Public transport tickets

 **59** bus lines

56 day bus lines

3 night bus lines

PLN 3,20 30-min ticket price

PLN 3,60 60-min ticket price

PLN 5 2-hours ticket price

PLN 9 12-hours ticket price

PLN 92 monthly ticket price



Roads

- 3 express roads
- 2 national roads
- 4 regional roads



city bikes

140 km length of bicycle routes

97 city bikes stations

PLN 1 / h rental cost

Distance from Lublin to other cities:

Warsaw	.....	173 km
Wrocław	.....	468 km
Poznań	.....	466 km
Szczecin	.....	741 km
Łódź	.....	281 km
Katowice	.....	350 km
Kraków	.....	309 km
Rzeszów	.....	162 km
Gdańsk	.....	508 km
 Berlin	.....	738 km
 Hamburg	.....	1028 km
 Prague	.....	755 km
 Minsk	.....	521 km
 Kiev	.....	606 km
 Moscow	.....	1221 km
 Vilnius	.....	477 km

Lublin Airport - regular flights

-  Dublin
-  Eindhoven
-  Kiev
-  London Luton
-  Oslo Sandefjord
-  Tel Aviv
-  Warsaw
-  Cologne-Bonn
-  Burgas (flights take place in the summer)
-  Antalya (flights take place in the summer)





● OSLO SANDEFJORD

WARSAW ●

● LUBLIN

● KIEV

● BURGAS

ANTALYA ●

TEL AVIV ●

Distance from the Main Railway Station in Lublin



Airport



25 min



Investors' and Exporters' Assistance Centre



10 min



32 min



Investor Relations Office (Lublin City Office)



10 min



32 min



Lublin Conference Centre



10 min



32 min



Centre for the Meeting of Cultures



10 min



32 min



International Lublin Fair



1 min



3 min



Aqua Lublin



3 min



15 min



Arena Lublin



2 min



10 min



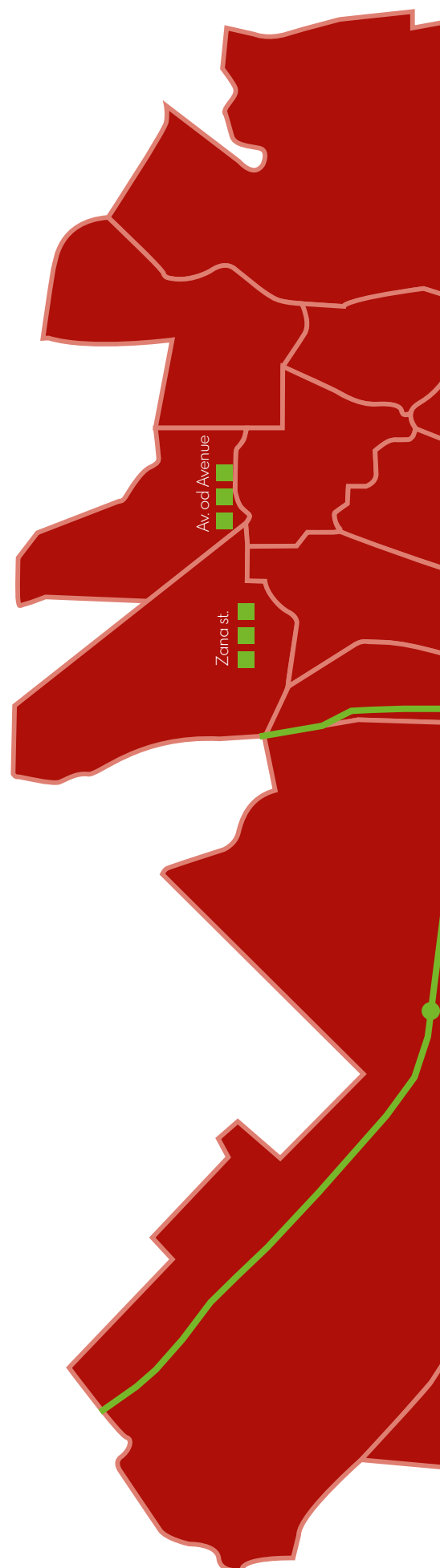
The Old Town

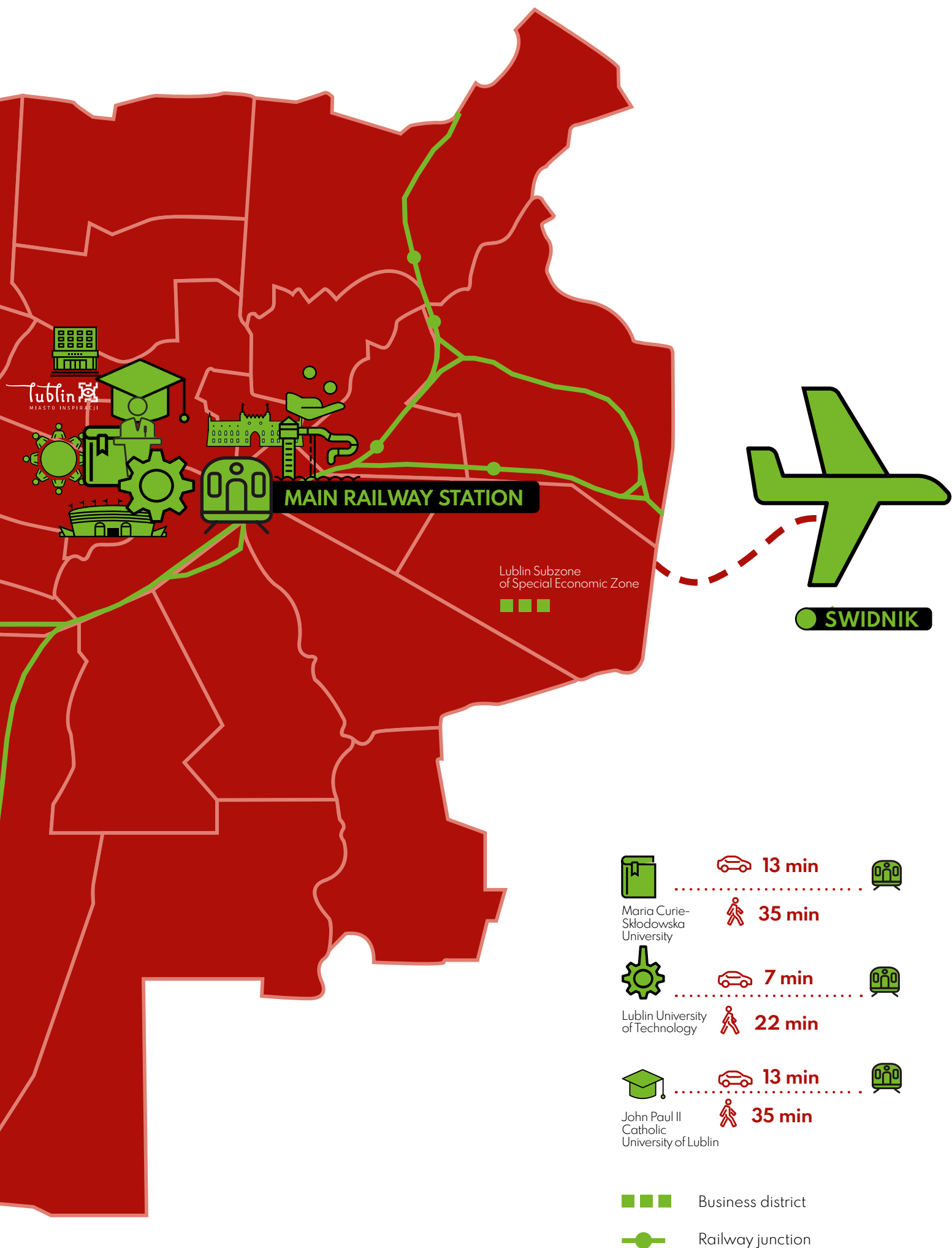


10 min



22 min





Office buildings

Total existing A/B+ Class office space	191 233 sq m
Total A/B+ Class office space under construction	22 000 sq m
Total A/B+ Class office space planned (during years 2021-2023)	29 000 sq m
A/B+ Class office spaces	48
A/B+ Class office spaces under construction	3
Planned A/B+ Class office spaces (during years 2021-2023)	3
Minimum rent in A/B+ Class	EUR 9 /sq m/month
Maximum rent in A/B+ Class	EUR 13,5/sq m/month
Average services fees in A/B+ Class	PLN 10

The biggest office buildings

BUILDING	ADDRESS	OWNER	TOTAL EXISTING SPACE
CZ Office Park A	Nałęczowska 14	Centrum Zana	20 000 sq m
Spokojna 2	Spokojna 2	Orion	18 520 sq m
Gray Office Park A	T. Zana 32	Centrum Zana	13 000 sq m
Gray Office Park D	Wallenroda 4D	Sąd Okręgowy w Lublinie	8 700 sq m
Gray Office Park C	Wallenroda 4C	Centrum Zana	7 000 sq m
W9A	Wojciechowska 9A	HanESCO	5 450 sq m
Centrum Zana	T. Zana 39	First Property Poland	5 450 sq m
G5 Inwestycje	Gęsia 5	G5 Inwestycje	5 400 sq m

Warehouses

Total existing warehouse space	231 700 sq m
Total warehouse space under construction	53 100 sq m
Total planned warehouse space	111 500 sq m
Average rent in warehouses (city and environs)	2,5–2,8 EUR/sq m/month

Selected warehouses

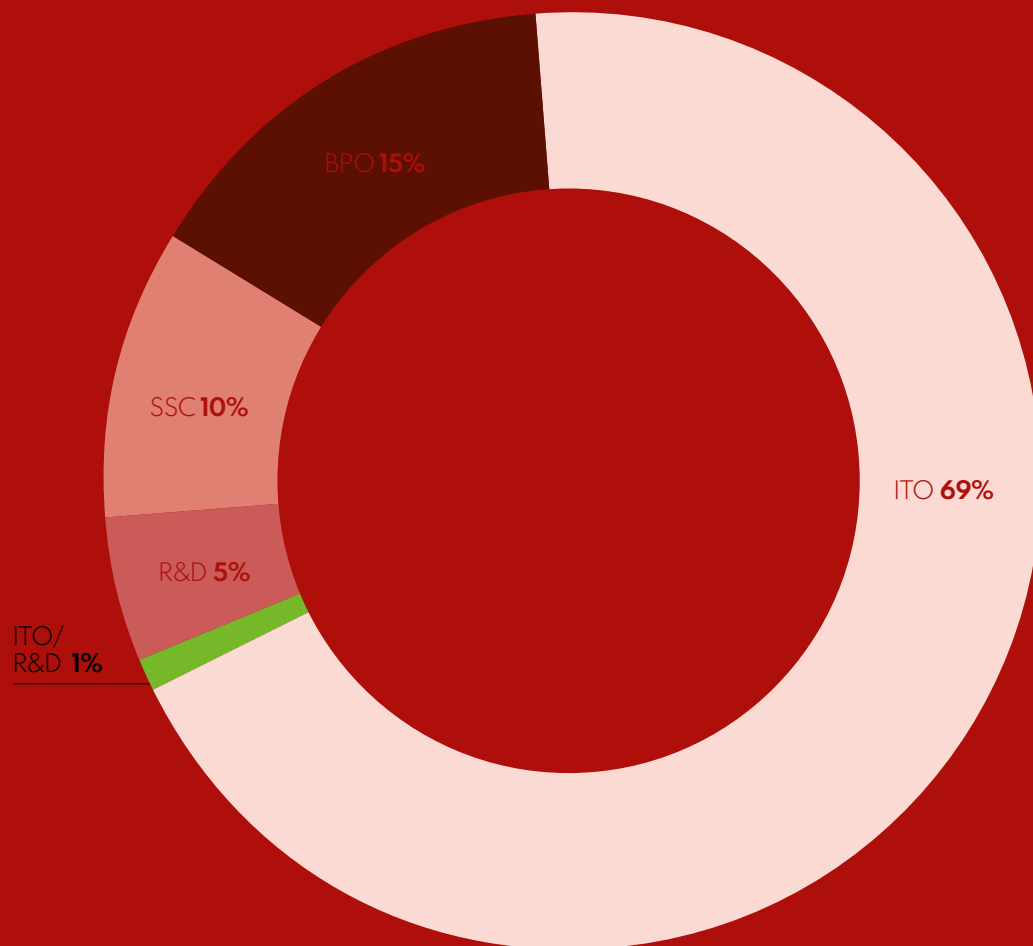
BUILDING	ADDRESS	DEVELOPER	EXISTING SPACE	SPACE UNDER CONSTR.	PLANNED SPACE
Panattoni Park Lublin	Lublin, Józefa Franczaka „Lalka” 12, 14, 16, 18	Accolade	70 200 sq m	-	-
Panattoni Park Lublin II	Niemce near Lublin, Przemysłowa 4	Panattoni	25 300 sq m	-	60 000 sq m
Panattoni Park Lublin III	Lublin, Tyszowiecka	Panattoni	-	53 100 sq m	-
MLP Lublin	Lublin, Erazma Plewińskiego 18	MLP Group	45 400 sq m	-	-
MLP Lublin II	Świdnik, Nadleśna	MLP Group	-	-	51 500 sq m
Goodman Lublin Logistics Centre (BTS Stock)	Lublin, Metalurgiczna 62	Goodman	33 400 sq m	-	-
GO EAST - Lublin Logistics Centre	Lublin, Do Dysa 5	Go East	7 900 sq m	-	-

Shopping malls

Number of shopping malls	14
Total existing space	386 837 m ²
Total empty space	11 900 m ²
Average rents in prime spaces	40–50 EUR/m ²

Selected shopping centers

BUILDING	ADDRESS	DEVELOPER	TOTAL EXISTING SPACE
Felicity Lublin	al. Wincentego Witosa 32	Atrium Poland Real Estate	75 000 sq m
Galeria Olimp	al. Spółdzielczości Pracy 34	PHUT TRANSHURT	63 000 sq m
Skende Shopping (IKEA)	al. Spółdzielczości Pracy 88	IKEA Centers	57 500 sq m
Vivo! Lublin	al. Unii Lubelskiej 2	Immofinanz Group	38 000 sq m
Park Handlowy Kraśnicka (+ Agata Meble + Bricoman + Decathlon)	al. Kraśnicka 128	Interbud-Lublin	25 900 sq m



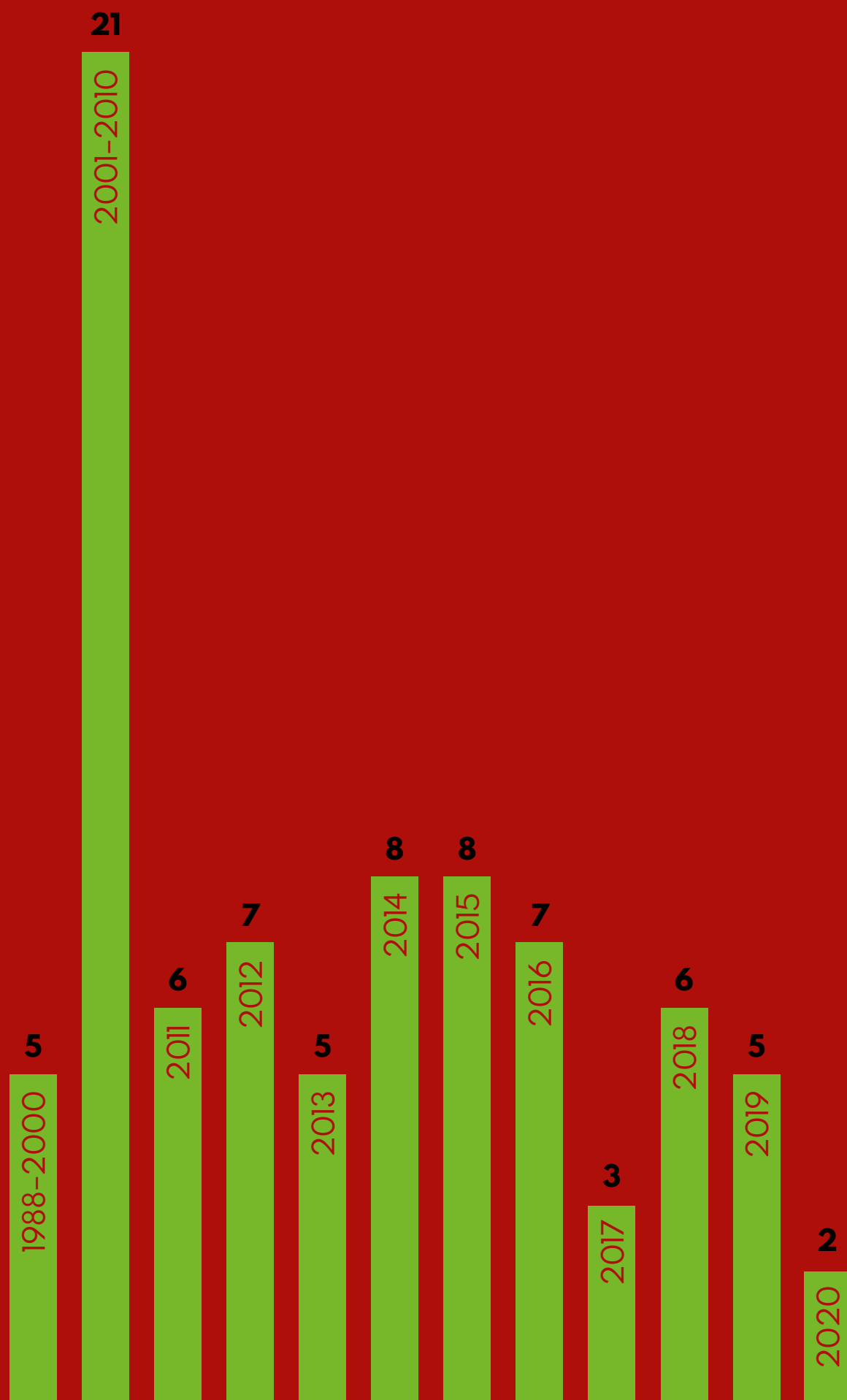
Type of operation

COMPANY	TYPE
Akanza	ITO
Altikom Software & Consulting	ITO
Arcus Systemy Informatyczne Sp. Z o.o.	ITO
ARIMR	ITO
Asseco Business Solutions	ITO
Betacom	ITO
Billenium	ITO
Bitstream	ITO
Britenet	ITO
Capgemini	BPO
Centralny Ośrodek Informatyki	ITO
Centrum Operacji Księgowych Orange Polska	SSC
Cheepro	ITO
Codete	ITO
Comarch	ITO
Compugroup Medical	ITO
Concentrix CVG International Sp. Z o.o.	BPO
CTNT Polska	R&D
DataArt Lublin	ITO
Dovilo Services Sp. z o.o.	ITO
Edge One Solutions Sp. Z o.o.	ITO
eLeader	ITO
Embiq	ITO
EOS KSI Polska Sp. z o.o. (Call Center)	SSC
Finanteq	ITO
Frontkom (d.Netkata)	ITO
Generali (Contact Center)	SSC
Genpact	BPO
Gfi Poland	ITO
Industi Sp. z o.o.	ITO
Infinite	R&D
InteliWise	ITO
Intive	ITO
IT ligent Group Sp. Z o.o.	ITO
JMMJ	ITO
Kredyt Inkaso SA	BPO
KS Engineering Technology	R&D
Lingaro	ITO
Mikrobit	ITO
Milo Solutions	ITO
Mobica	ITO
Monogo	ITO

COMPANY	TYPE
Netbulls	ITO
News Hub Media	ITO
nocowanie.pl	SSC
Nplay Sp. Z o.o.	ITO
o4b	ITO
Onet	SSC
Onwelo	ITO
Open Finance (Contact Center)	BPO
OPTeam	ITO
Optronik	ITO
Orange Customer Service	SSC
PDK Polska Sp. z o.o.	BPO
Pekao Faktoring	SSC
PhlexGlobal	SSC
PKO BP (Contact Center)	BPO
Predica	ITO
Proacta	ITO
Promoship	ITO
PwC IT Services	ITO
Quad Graphics	SSC
Randstad Payroll Solutions	BPO
R-Soft Studio	ITO
Santander Bank Polska (Contact Center)	BPO
Sii	ITO
Simple	ITO
SoftSystem	R&D
Solet	ITO
Sollers Consulting	ITO
Solveris	ITO/R&D
Sparkbit	ITO
Spółka Inżynierów SIM Sp. Z o.o.	ITO
Superksięgowa	BPO
Sygnity	ITO
Team International	ITO
Transition Technologies	ITO
Trimetis Sp. Z o.o.	ITO
uPaid	ITO
Veture Devs	ITO
Vistra Corporate Services	BPO
Voice Contact Center (OEX Group)	BPO
Webchili	ITO
ZETO	ITO

Total number of business entities

46 180






















Year of inauguration in Lublin

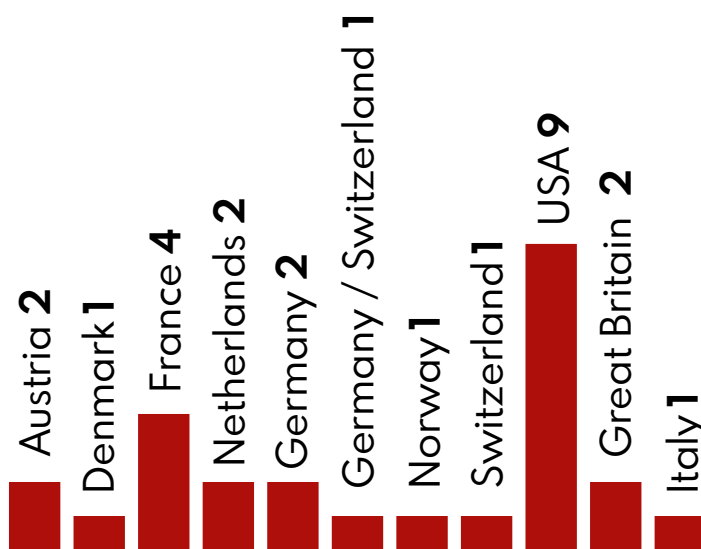
Institutions supporting entrepreneurship

- Investor Relations Office (Lublin City Office)
- Biznes Lubelskie Team (Marshal Office)
- Lublin Science and Technology Park
- Lublin Development Foundation
- The Lubelskie Region Development Foundation
- Business Link powered by AIP
- SoftwareCamp
- Business Incubator at the Lubelskie Region Development Foundation
- Alter Limited Business Incubator
- Technology Incubator
- Lublin IT Incubator
- Progress Incubator
- Entrepreneur Incubator of the Lublin University of Technology
- Academic Entrepreneur Incubator of the Catholic University of Lublin (KUL)
- Academic Entrepreneur Incubator of the University of Economics and Innovation in Lublin (WSEI)
- Academic Entrepreneur Incubator of the University College of Enterprise and Administration in Lublin (WSPA)
- Polish Foundation of Centres Supporting Economic Development "OIC Poland"
- "Lewiatan" Employers of the Lubelskie Region Organization
- Employers of the Lublin Region
- Lublin Forum of Employers
- Chamber of Industry and Commerce in Lublin
- Association of Lublin Business Club
- Business Center Club
- Chamber of Crafts and Entrepreneurship in Lublin
- Lublin Chamber of Crafts
- Regional Chamber of Commerce

Outsourcing centres using foreign languages

 Polish: 84	 Italian: 2
 English: 82	 Danish: 1
 German: 11	 Japanese: 2
 Czech: 2	 Swedish: 1
 Dutch: 1	 African languages: 1
 Ukrainian: 5	 Arabic: 1
 Russian: 5	 Hungarian: 2
 Romanian: 1	 Portuguese: 1
 French: 5	 Bulgarian: 1
 Spanish: 3	

Country of origin



Call Center

*Jobs – English speakers (PLN gross)



POSITION	MINIMUM	MAXIMUM
Junior Consultant	2 750	3 500
Consultant	3 200	4 500
Senior Consultant	4 000	5 000
Team Leader	5 000	7 000
Supervisor	6 000	8 500
Manager	10 000	15 000

IT

*Jobs – English speakers (PLN gross)



POSITION	MINIMUM	MAXIMUM
Net Developer	5 500	11 000
C++ Developer	5 500	10 000
Help Desk	4 000	6 000

Gross average monthly salary in PLN in Lublin

4 500

Accounts payables /Accounts Receivables

*Jobs – English speakers (PLN gross)



POSITION	MINIMUM	MAXIMUM
Junior accountant	3 200	4 300
Accountant	4 500	6 000
Senior accountant	6 300	10 000
Team Leader	10 500	14 000
Supervisor	14 500	17 000
Manager	17 000	22 000

General Ledger

*Jobs – English speakers (PLN gross)



POSITION	MINIMUM	MAXIMUM
Junior accountant	3 500	4 500
Accountant	5 000	6 500
Senior accountant	7 000	11 500
Team Leader	12 000	15 000
Supervisor	15 500	18 000
Manager	18 000	23 000

Source: Adecco Poland

/Culture, entertainment, recreation

9  cinemas

6  theatres

11  museums

12  hospitals

14  shopping malls

Conference facilities

- Lublin Conference Centre
- Centre for the Meeting of Cultures
- Medical University in Lublin Conference Center
- Congress Center of the University of Life Sciences in Lublin
- Etiuda Conference and Exhibition Center
- Atelia Banquet and Catering Center****
- Centre of Culture in Lublin
- Lublin Science and Technology Park
- Lublin Fair
- Hotel Alter****
- IBB Grand Hotel Lublinianka****
- Hotel Luxor****
- Focus Hotel Premium Lublin****
- InBetween Hotel Lublin****
- Hotel Ilan****
- Ibis Styles Lublin Stare Miasto***
- Hampton by Hilton***
- Agit Hotel Congress&Spa***
- Hotel Wieniawski***
- Hotel Focus Centrum Konferencyjne***
- Hotel Mercure***
- Arche Hotel Lublin***
- Hotel Focus ***
- Hotel Locomotiva***
- LubHotel ***
- Hotel Campanille**

37  hotels

1 five-star *****

7 four-star ****

24 three-star ***

Examples of business, cultural and sports events

- 2016 BSS Forum
- LubInvest
- Eastern Europe Initiatives Congress
- Lublin Mayor's Economic Awards
- European Innovation Week
- Lublin IT Upland Days
- Check IT
- Uczeń na Wyżynie IT
- EcoForum
- Ambassador of Lubelskie Region
- Eastern Days of Cooperation
- Engineers for Lublin
- Lublin Fair for Energetics
- Click
- Lublin IT Days
- Microsoft Expert Summit
- Health and Medical Tourism Summit
- Polish Congress of Entrepreneurship
- Pacific Voice Conference
- Digitization Forum of the Lubelskie Region
- Zasmakuj Lubelskiej Konferencji
- Nevada – Lubelskie Acceleration Bridge
- Eastern Poland Logistics Forum
- Lublin Design
- Hackathon LUBCODE – Code for Lublin
- TEDx Lublin
- Job Fair
- Samorządowy Kongres Gospodarczy – II Forum Regionów Trójmorza
- New Mobility Congress
- Carnival Sztukmistrzów
- Night of Culture
- Jagiellonian Fair
- Lublin Sportival
- FIFA U20 World Cup Poland 2019
- Lublin Marathon
- Winter Polish Swimming Championships 2018
- Cavaliada Equestrian Competitions
- Lublin Jazz Festival
- Lublin Literary Meetings – City of Poetry
- Bitter-Sweet Theatres Festival "The Neighbours"
- Festival of Art. In Public Spaces – Open City
- Landart Festival
- Academic Polish Athletics Championships 2018
- Arena Grand Prix Polish Cup in Swimming
- Polish Athletics Championships 2018
- Bridge of Culture
- European Festival of Taste
- Chatka Blues Festival
- Ukraine in the Centre of Lublin Festival
- International Dance Festival in Lublin
- Falkon Convention
- East of Culture – Different Sounds Art'n'Music Festival
- Lublin Business Run

24  fairs

/Notes

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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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In cooperation with:



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