

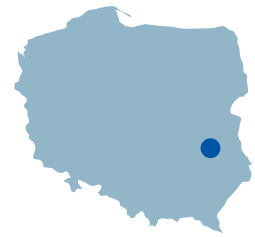


Focus on

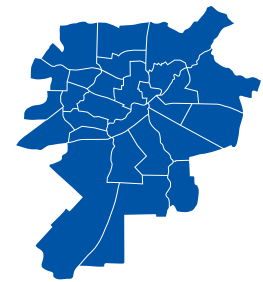
August 2014



Europa



Poland



Lublin

Investment attractiveness

Lublin is the biggest and fastest developing city in Eastern Poland and a strong regional academic, cultural, and economic centre. The close proximity of the city to the eastern border of the European Union is of strategic importance to both residents and investors. Lublin is the first city in the region that began and is successfully continuing the process of obtaining outsourcing related investments.

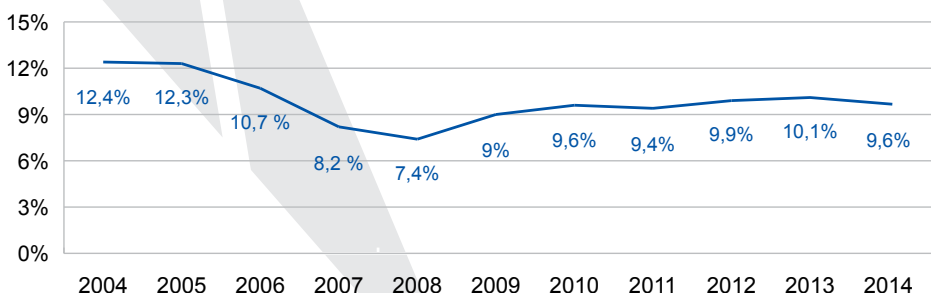
BPO/SSC sector companies have become noticeably more active over the last three years thanks to the availability of a highly qualified labour force, a wide offer of office space, and relatively low operating costs. The city is of particular interest to the banking, insurance, and telecommunications sectors. There are currently 7 operations centres in Lublin that provide services to the clients of PKO BP, Alior Bank, Proama, Warta, and Orange and which have a total of almost 3,000 employees. Foreign investors in the BPO/SSC sector whose offices are in Lublin include such companies as Genpact, Mobicca, and Convergys.

Human capital is one of the key assets of the city. The high level of the academic potential of Lublin constitutes an important factor that helps in the economic development of the city. The 10 universities in Lublin have approximately 75 thousand students, including more than 3 thousand foreigners, which makes Lublin the third most internationalised city in Poland in terms of universities. There are more than 24 thousand graduates each year, which makes the city one of the national leaders in terms of the ratio of students to residents. The universities in Lublin have numerous fields of study that satisfy the need of the BPO/SSC sector for employees: there are 3.3 thousand students of foreign languages, 3 thousand students in the field of economics, 2.2 thousand students in the field of finance and accounting, and 2.3 thousand students in IT fields, which means a total of 10.8 thousand highly qualified potential employees.

Lublin is a city that is increasingly discovered and valued by the modern business services sector.

We invite you to Focus on Lublin!

Unemployment rate



Town area:

147,47 km²

Population:

347 678

Professional activity ratio with regard to population in the age of 15 or more according to the level of education

higher	81,2%
post-secondary and vocational secondary	68,6 %
secondary of general education	45,4%
vocational	64,7 %
secondary junior (gymnasium), primary, lower	18,8%

Education

Number of kindergartens: **141**

public: 68	private multilingual kindergartens: 73 including 7 multilingual kindergartens
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Total number of schools: **274**

data from 2013/2014 including primary schools, gymnasiums, post-gymnasium schools, post-secondary schools

primary schools: 41	gymnasiums: 26	secondary: 28	+ technical and vocational schools in more than 20 associated high schools
Students 18 382	Students 7 918	Students 9 590	Students 7 393
Graduates 2 728	Graduates 2 673	Graduates 3 180	Graduates 1 352

Number of language schools: **272**

Number of colleges and universities: **10**

Public colleges and universities: **5**
Private colleges and universities: **5**

Students	IN TOTAL	Graduates
2590	Management	1063
3158	Philology	1082
4015	Teacher Training and Education science	1985
1967	Finance and accounting	741
4916	Administration	2037
3622	Law	790
2961	Computer Science	445
1897	Logistics	373
2475	Economics	906
586	Political Science	317
1484	Mechanics and Mechanical Engineering	220
1247	Management and Product Engineering	333
622	International relations	177
2299	Psychology	294
379	International economic relations	167
745	Sociology	369
1153	Mathematics	361
3303	Medicine	521
1161	Computer science and econometrics	232
729	Biotechnology	221
34 837	Other fields of study	11 306

3 schools of tertiary education offer philological studies:



English Philology, German, Philology Iberian, Roman Philology, Russian Philology, Slavic Philology, Philology Ukrainian, Belarusian Philology, Applied Linguistics



English philology, Roman Philology, Germanic Philology, Slavic Philology, Sinology, Dutch Philology, Iberian philology



English Philology, Iberian philology

Transportation

Lublin Airport



Number of arrivals and departures

Year	Total passenger traffic	Flight operations
2014	103 808	1 680
2013	189 702	2 286
2012	5 702	50

Flight destinations: **14**

Regular flights:

- Frankfurt (Germany)
- Gdańsk (Poland)
- London Luton (UK)
- London Stansted (UK)
- Mediolan (Italy)
- Oslo (Norway)
- Rzym (Italy)
- Wrocław (Poland)

Charter:

- Burgas (Bulgaria)
- Sharm El Sheikh (Egypt)
- Antalya (Turkey)
- Kreta (Greece)
- Alicante (Spain)
- Fuerteventura (Spain)



Availability of motorways:

Expressways: S17 is under construction

(completion date: 2017/2018)

S19 is planned - connection with the A4 motorway

(completion date of the Lublin-Rzeszów section: IQ 2018)



Car rentals: **37**



Number of taxi companies: **14 (1600 vehicles)**



Number of bus lines: **49 days buses and night buses**



Number of tram lines: **8 days tram lines**



Railway/number of connections to other cities: **201**

Distance from Łódź to other cities in kilometres

Warsaw	Wrocław	Gdansk	Szczecin	Poznan	Katowice	Cracow	Rzeszow	Lublin	Berlin	Hamburg	Prague	Minsk	Kiev	Moscow	Vilnius
168	447	582	736	294	348	276	169	475	732	1015	769	518	606	1228	548

Business

Number of business entities in total:

43 334

Supply of office space	
total existing area of offices of A and B+ class	145 400 m ²
total area of offices of A and B+ class under construction	13 300 m ²
total planned area of offices of A and B+ class	68 000 m ²
average rent of A class offices in Łódź	10 - 11 EUR

Warehouse space	
total existing warehouse space	130 100 m ²
total warehouse space under construction	0 m ²
total planned warehouse space	104 800 m ²
average rent of warehouse spaces in Łódź and in the neighbourhood	3,5 - 4,0 EUR

Class	Number of buildings	Total space
A	2	25 500
B+	10	48 400
B	27	71 500

Examples of office buildings

Year	Status	Building	Address	Owner	Area	Car park places
2006-2011	EX	Gray Office Park	Wallenroda 4	Centrum Zana / Sąd Rejonowy	41 200 m ²	447
2001-2005	EX	Zana 39 / 39a	Tomasza Zana 39/39a	First Property Poland	15 800 m ²	158
2004-2005	EX	Zana Office	Wallenroda 2	Centrum Zana / First Property	8 000 m ²	44
2013-2014	EX / UC	Nord Park	Szeligowskiego 6	Centrum Zana	7 400 / 4 700 m ²	369
2008-2010	EX	Witosa 16/18	Witosa 16/18	Centrum Zana	6 300 m ²	197
2003	EX	TPSA	Chodźki 10a	TPSA	6 000 m ²	n/d
1998	EX	W9a	Wojciechowskiej 9a	HanESCO	4 800 m ²	n/d
2013	EX	JPBC Business Center	Jana Pawła II 17	JPBC	4 700 m ²	120
2014	EX / UC	DK Med Offices	Lipowa / Sądowa	DK Med	4 300 / 1 700 m ²	n/d
2012	EX	Rupes	Żwirki i Wigury 1/3	Interbud / Rupes	3 600 m ²	n/d

Source: CBRE April 1st 2014 / EX - existing building, UC - building under construction

Examples of warehouse buildings

Building	City	Developer	Existing area	Area under construction	Planned area
PPL Omega Pilzno	Pilzno	Omega Pilzno	49 000 m ²	0 m ²	21 000 m ²
Panattoni BTS Pilkington	Nowa Dęba	Panattoni	35 000 m ²	0 m ²	0 m ²
Panattoni BTS Zelmer	Rzeszów	Panattoni	32 500 m ²	0 m ²	0 m ²
Centrum Logistyczne Mełgiewska	Lublin	CLM	13 600 m ²	0 m ²	18 800 m ²
East A4 Logistic Park	Młyny	Waimea Holdings Limited / Brabant	0 m ²	0 m ²	65 000 m ²

Source: CBRE April 1st 2014

Events in Lublin

- Eastern Europe Initiatives Congress
- EcoForum
- Entrepreneurship Gala
- Lub-Invest Eastern Economic Forum
- Ambassadors of the Lublin Region
- Industry fairs organised by Targi Lublin SA
- Lublin IT Summit Days
- Business Excellence Programme for the Promotion of Businesses and Municipalities
- Export-Import-Cooperation Conference

Institutions supporting entrepreneurship

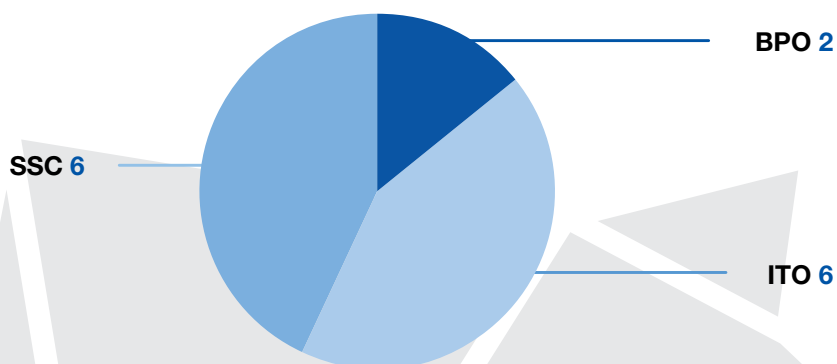
Among business - related institutions (except for scientific and research institutes) which influence economic development of the region, there are the following units:

Lublin Science and Technology Park ■ Business Link Lublin ■ Industrial Development Agency branch in Mielec ■ Lublin Business Club Association ■ Business Center Club ■ Lublin Development Foundation ■ "Lewiatan" Lublin Employers' Organisation ■ Lublin Employer's Association ■ Regional Chamber of Commerce ■ Lublin Chamber of Crafts ■ Chamber of Commerce and Industry in Lublin ■ Lublin Region Development Foundation ■ "OIC Poland" Polish Foundation of Economic Development Support Centres ■ Lublin Region Entrepreneurship Council

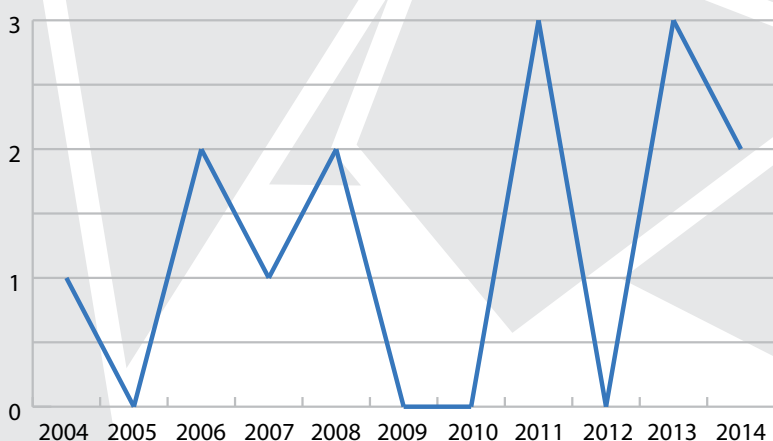
Business: Outsourcing

Innovative business services

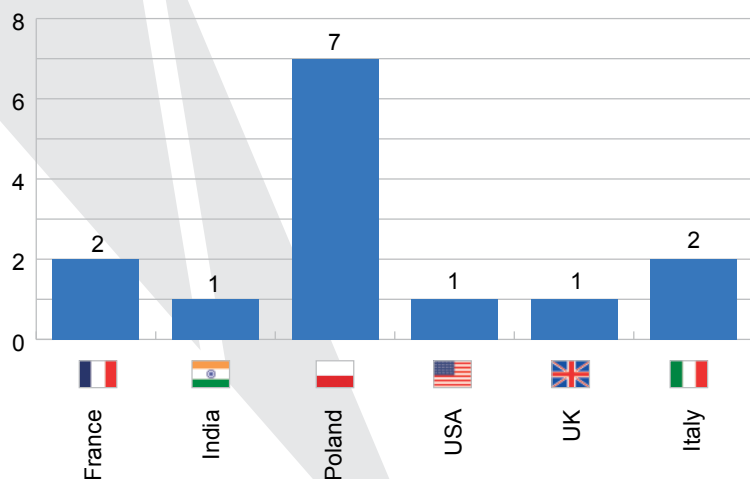
Operating activity



Number of investments annually

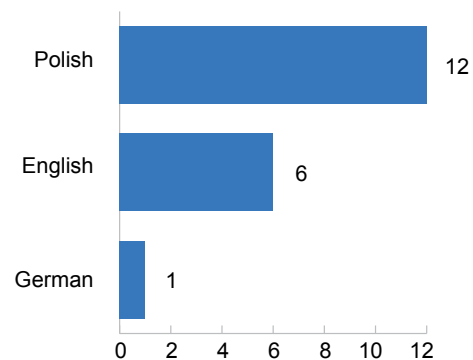


Number of investments - country of origin



Organisation/ business entity	Services provided
Alior Bank	CC
Billennium	IT
Britenet	IT
Centrum Operacji Księgowych Orange Polska	F&A
Comarch	IT
Convergys Corporation	CC
Genpact Poland	F&A
Mobica	IT
Orange Customer Service	CC
PKO Bank Polski	CC
Proama	CC/IT/HR
Sii	IT
Transition Technologies	IT
Warta	CC

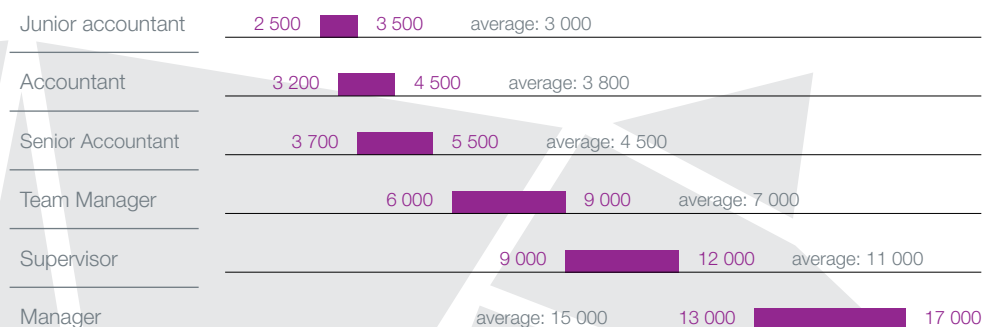
Outsourcing centers with the foreign language support



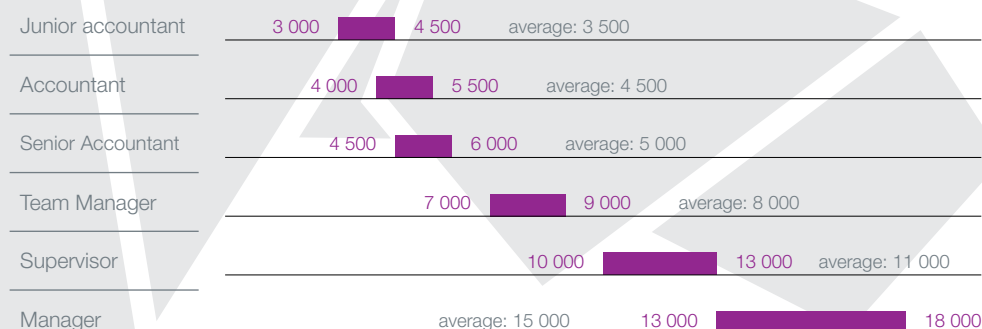
Salaries

Jobs - English speakers (PLN gross)

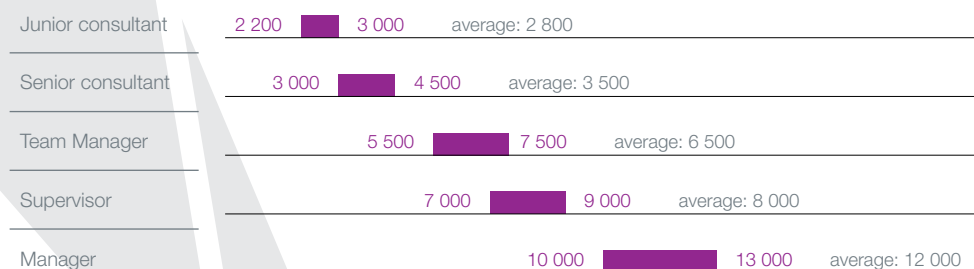
Payables Management / Receivables Management



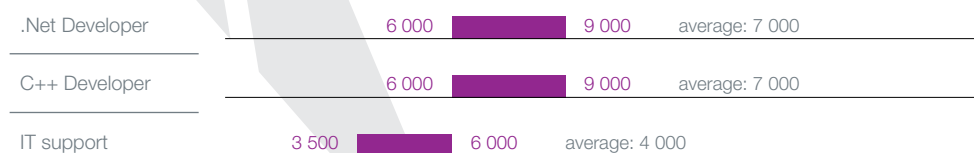
General Ledger



Call Center



IT



Jobs with other languages - average salaries (PLN gross)

German, French, Spanish, Italian, Russian	Dutch, Swedish
3500	4500
4500	5500
5500	6500
8500	9500
13 000	14 000
18 000	20 000

German, French, Spanish, Italian, Russian	Dutch, Swedish
4000	4500
5500	6000
7000	8000
9500	11 000
13 000	14 000
18 000	20 000

German, French, Spanish, Italian, Russian	Dutch, Swedish
3400	3700
4000	4500
8000	8500
9500	11000
14000	16000

German, French, Spanish, Italian, Russian	Dutch, Swedish
7500	8000
7500	8000
4500	4500

Culture / Entertainment / Recreation



Number of museums: **9**



Number of theatres: **20**



Number of art galleries: **20**



Number of cinemas: **6**



Festivals: **40**



Number of hotels: **22**
15 *** 3 ****



Number of shopping malls: **16**



Number of restaurants/ clubs:
83 restaurants,
138 bars / clubs,
53 pizzerias, two drink
bars of chocolate



Fairs: **22 fairs per year**

Sports facilities

3 stadiums,
13 small football stadium,
12 indoor swimming pools,
235 sports fields,
7 gyms,
86 sports halls,
2 bowling clubs,
1 marina,
17 tennis courts,
12 squash courts,
7 climbing walls

Conference facilities: **52**

Conference Centre of the Medical
University of Lublin

Nowy Graf Conference Centre and
Restaurant

Etiuda Conference and Exhibition Centre

Conference Centre of the University of Life
Sciences

Centre for Culture in Lublin

Lublin Science and Technology Park

Targi Lublin SA

Hotel Alter ****

Grand Hotel Lublinianka ****

Hotel Europa ****

Hotel Ilan ****

Best Western Plus Hotel Korona
SPA & Wellness ****

Best Western Agit Congress & Spa ***

Hotel Campanile ***

Hotel Forum ***

Hotel Luxor ***

Hotel Mercure ***

Hotel Victoria ***

Hotel Focus Centrum Konferencyjne

Hotel Pod Kasztanami

Major events

Night of Culture,

Carnival of Arts - Masters,

Jagiellonian Fair,

"Different Sounds" Festival,

Multicultural Lublin,

Small Theatres Festival,

European Festival of Taste,

Chatka Blues Festival,

"Theatre Confrontations" Festival,

International Dance Theatres Festival,

"Dissent" Student Theatre Festival,

Bridge of Culture,

"Open City" Festival of Art in Public Spaces.

FALKON National Fantasy Festival

Focus on Lublin
prepared by



In co-operation with



Members of the Outsourcing Club in Lublin:



Pro Progressio - foundation supporting growth and promotion of outsourcing industry in Poland. The foundation co-operates with the public and private sector as well as with the international organisations operating in the outsourcing sector.

Pro Progressio is closely related with outsourcing sector media that is with OutsourcingPortal and Outsourcing&More magazine.

Pro Progressio manages the Outsourcing 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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