

SURVEY BY ANTAL AND CUSHMAN & WAKEFIELD

Investment potential of Lublin

Edition 4

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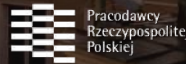
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 ADVANTAGE AUSTRIA

SURVEY BY ANTAL AND CUSHMAN & WAKEFIELD

Investment potential

LUBLIN



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The project is a valuable tool for all entrepreneurs and investors interested in developing their business in Poland.

ARTUR SKIBA

Foreword

Ladies and Gentlemen,

We are very pleased to present the series of reports from the fourth edition of the Business Environment Assessment Study. This is a comprehensive compilation of data and analysis, enriched with expert commentary.

The project is a valuable tool for all entrepreneurs and investors interested in developing their business in Poland.

The report reflects the current situation in the market and provides a business perspective, identifying the main trends in the economic development of companies in Poland's largest cities.

The project once again came about through close cooperation between Antal, a leader in HR consulting, and Cushman & Wakefield, a recognized real estate expert and leading international real estate services consultancy.

Our knowledge and experience were crucial in analysing the survey results and creating the report, which is not only a comprehensive compilation of data, but also a tool for strategic business decision-making.

1,290
decision-makers

The survey included 1,290 decision-makers, representatives of companies active on the Polish market.

9 cities

The project includes an analysis of the business environment in nine cities, and takes into account important areas such as:

1. the city's overall assessment,
2. infrastructure,
3. office space,
4. government support,
5. education potential,
6. employment potential,
7. business potential and
8. evaluation of the location as a place to live.

- the cost of living,
- housing prices on the secondary and primary markets,
- office rental rates,
- wages offered by employers,
- the number of students and graduates, and
- the number of employed people in the region by sector.

We hope that this report will become a valuable source of knowledge and inspiration for all those interested in business development and investment in the Polish market.

Enjoy your reading.

The report accurately describes the specifics of the Lublin market.

It contains key market information for investors, including:

Artur Skiba
ANTAL PRESIDENT

Krzysztof Misiak
EXECUTIVE PARTNER, HEAD OF POLAND,
CUSHMAN & WAKEFIELD



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The report is not only a comprehensive compilation of data, but also a tool for strategic business decision-making.

KRZYSZTOF MISIAK

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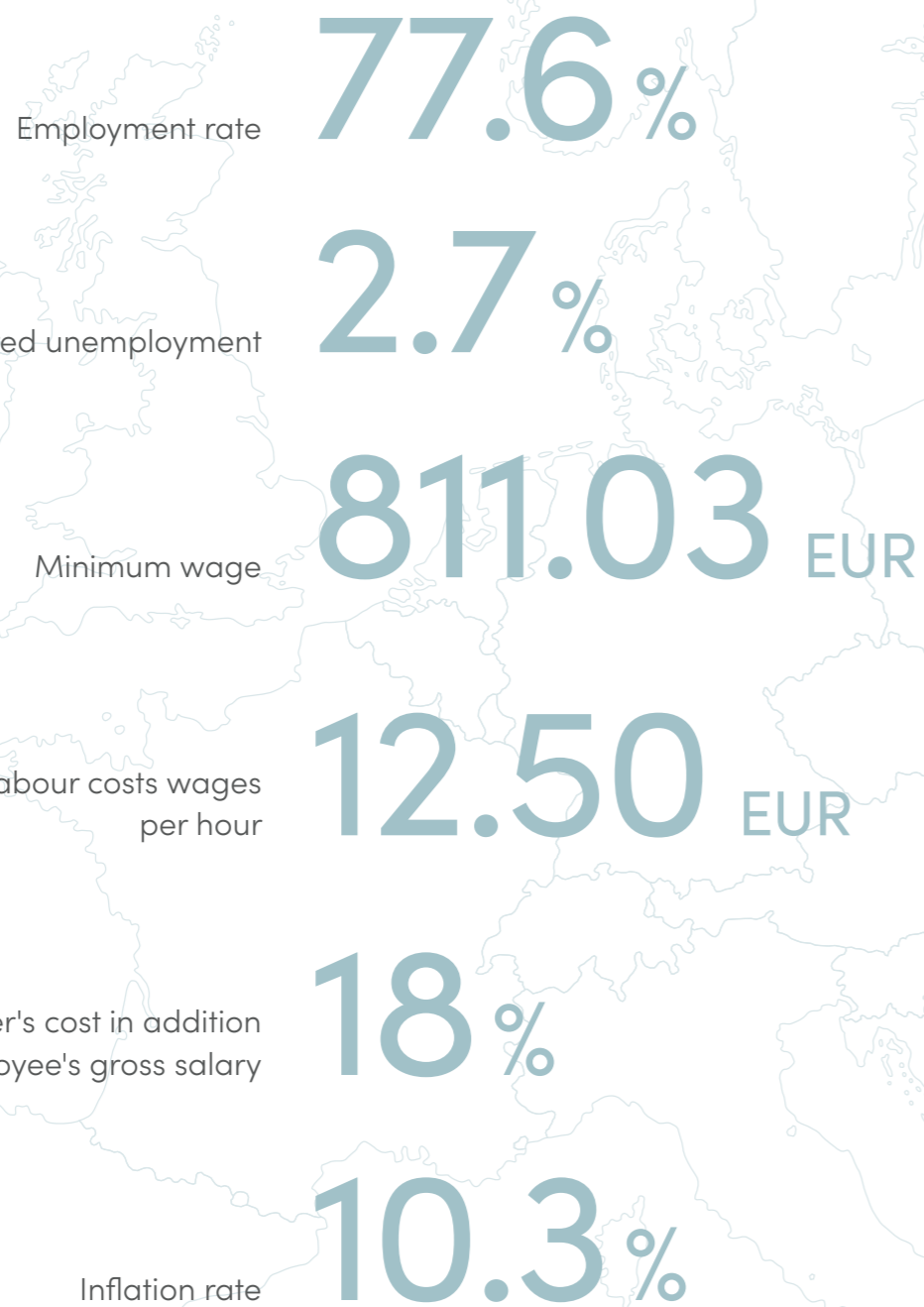


INVESTMENT POTENTIAL

Introduction

Investment potential – introduction

ECONOMIC INDICATORS AND EMPLOYMENT CONDITIONS IN POLAND



POLAND IN COMPARISON WITH SELECTED EUROPEAN COUNTRIES

Country	Employment rate [%]	Registered unemployment [%]	Minimum wage [EUR]	Labour costs wages per hour [EUR]	Employer's cost in addition to employee's gross salary [% of salary]	Inflation rate [%]
UE (27 countries)	75.3%	5.9%		30.50	24.8%	6.1%
Bulgaria	78.1%	4.0%	398.81	8.20	13.3%	7.8%
Czech Republic	81.8%	2.7%	728.67	16.40	24.0%	10.2%
Germany	81.4%	3.0%	1,997.00	39.50	23.3%	6.5%
Hungary	80.6%	3.9%	623.77	10.70	14.2%	17.5%
Poland	77.6%	2.7%	811.03	12.50	18.0%	10.3%
Romania	68.5%	5.4%	604.41	9.50	5.3%	8.9%
Slovakia	77.3%	6.0%	700.00	15.60	27.0%	10.3%
Eurostat data	Q1 2023	June 2023	Q2 2023	2022	2022	July 2023

“

The immediate future for FDI inflows to Poland looks optimistic, but nevertheless maintaining a competitive investment climate has been, is and will always be a challenge.

RADEK PITUCH

INVESTMENT POTENTIAL

Expert commentary

Radek Pituch

MANAGER BSS & TECH PROJECTS, DIRECT INVESTMENTS DEPARTMENT
POLISH INVESTMENT AND TRADE AGENCY (PAIH)

Poland has been maintaining and strengthening its leading position in attracting foreign investments in the CEE region for a long time. This positive trend is reflected in the investment portfolio of the Polish Investment and Trade Agency.

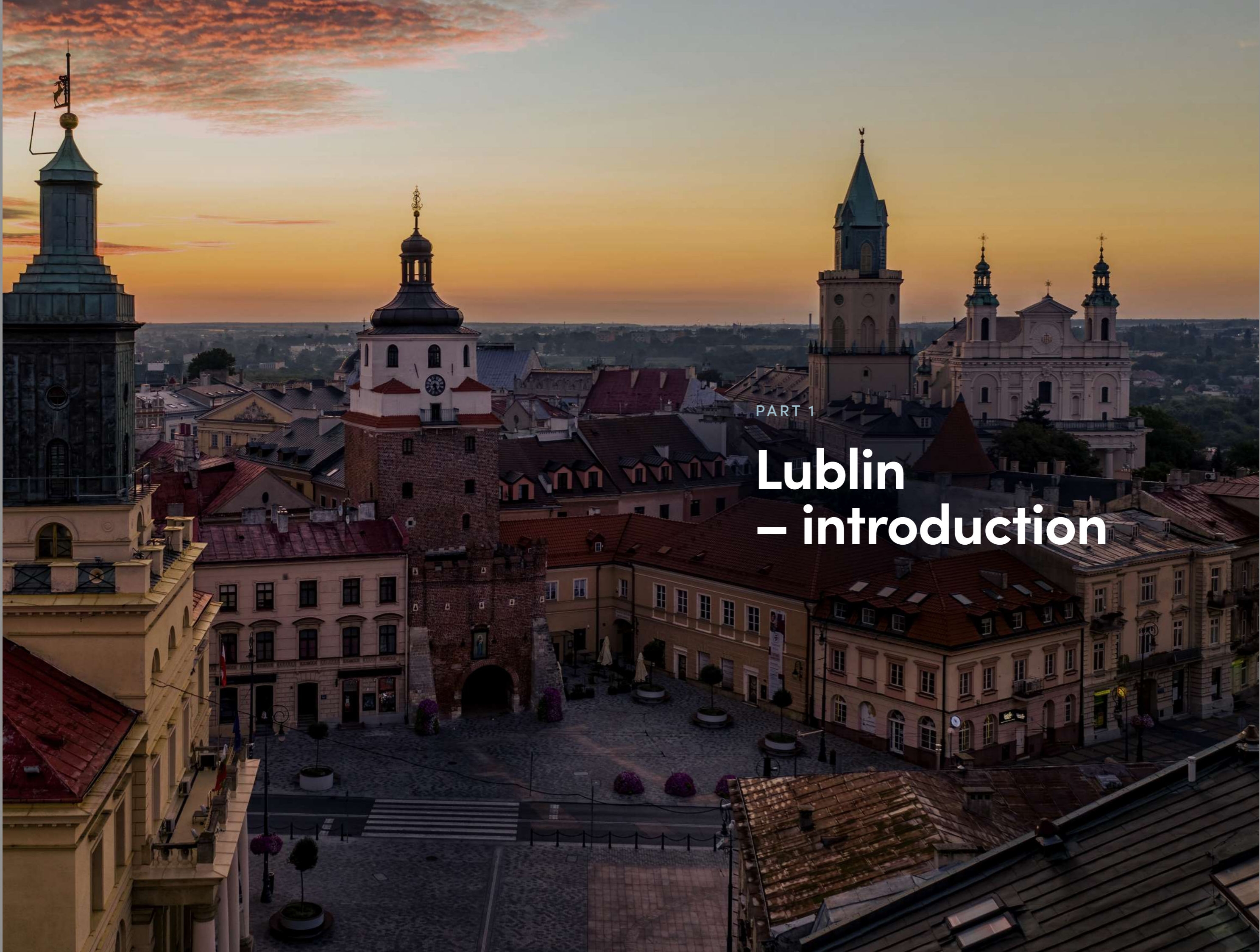
Since 2018, PAIH has recorded record highs in terms of investment outlays and the number of declared, newly created jobs supported projects.

The passing months of 2023 were particularly exceptional in this regard. We can speak of effective support for the placement of 47 new investments in Poland, many of which are carried out by well-known global brands from various sectors of the economy, from financial services, through the automotive industry, to semiconductors. In addition, PAIH's portfolio includes nearly 150 active projects that the agency is seeking to locate in Poland.

A number of factors are contributing to the continued growth of investment rates in Poland. First of all, it is necessary to point to the human resources potential – the wide availability of qualified and experienced talent. Poland has the largest population potential among CEE countries, and is one of the largest academic centres in Europe.

In the current market conditions, this is an undeniable asset. Second, Poland is a country open to innovation and new technologies. This is evidenced by some 100 newly created R&D and IT investments over the past two years. Third, an invaluable investment magnet is the excellent range of forms of business support for companies deciding to locate their capital in Poland. Thanks to an amendment to the *Program for the Support of Investments of Significant Importance to the Polish Economy for 2011-2030*, applying for a cash grant, of which PAIH is the operator, is even more transparent than before.

The immediate future for FDI inflows to Poland looks optimistic, but nevertheless maintaining a competitive investment climate has been, is and will always be a challenge. It is necessary to remain open to new industries, read well the needs and expectations of business and new investors, and actively promote the potential of the Polish economy internationally.



PART 1

Lublin – introduction

LUBLIN

Average rating

7.1

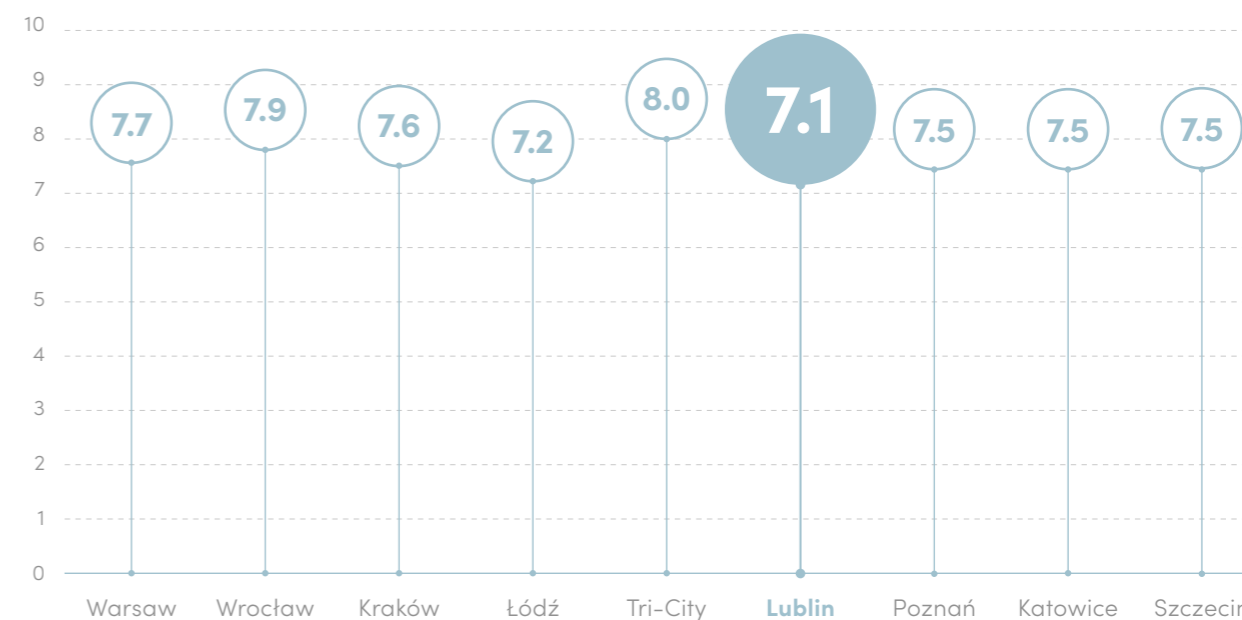
1.01. Lublin assesment

The Business Environment Assessment Study highlighted the main aspects influencing companies' investment decisions.

Respondents were asked to assess the business environment in the cities in which they operate. By compiling several indicators for each area, the report presents a comprehensive rating expressed on a scale of 0-10, where 0 is the worst possible rating and 10 is the best.

CHART 1.1.

Average rating of all factors for Lublin



Lublin is currently Eastern Poland's largest economic and academic centre, and the only city in this macroregion with metropolitan aspirations.

It is also an active participant in the cooperation network of European and global metropolises, counted among the most dynamically developing Polish cities and placed at the

top of rankings for sustainable development, absorption of EU funds, attracting investors and smart cities.

International rankings put the city on a par with Eastern European capitals such as Sofia, Zagreb and Vilnius. One example is the *Business-Friendly City Perception Report*, produced by the think-tank Emerging Europe.

Find out more at www.investmentpotential.pl

“

Lublin's convenient location, developed education sector, business infrastructure, quality of life and government support make this city a place worth considering as an investment location.

DR MARIUSZ SAGAN

LUBLIN – INTRODUCTION

Expert commentary

dr Mariusz Sagan

DIRECTOR OF THE DEPARTMENT OF STRATEGY AND ENTREPRENEURSHIP
LUBLIN CITY HALL

Lublin is the most developed city in Eastern Poland in terms of investment potential.

It has experienced rapid economic growth in recent years, attracting more and more investors. In 2022, Lublin was named one of the most attractive cities of the future in Central and Eastern Europe by fDi Magazine.

The city has many assets, the most important of which include:

- An accessible and educated workforce. Lublin is an academic centre with nine institutes of higher education. In addition, the city has access to skilled workers from other regions of Poland, as well as from Ukraine. In addition, numerous technology parks and business incubators support innovation and develop the potential of new technologies.
- Convenient location. Lublin is located in the heart of Central and Eastern Europe, making it an excellent location for companies that want to operate in both Eastern and Western markets. Its proximity to the borders with Ukraine and Belarus and its well-developed transport infrastructure make it an ideal logistics base.
- Favourable investment conditions. Lublin offers investors attractive conditions for doing business, including tax benefits. The city is also investing in business infrastructure development.

Modern office buildings, conference centres and technoparks create a favourable environment for entrepreneurship. The city is committed to sustainable development, which attracts companies from many sectors of the economy.

- The low cost of doing business is another argument for investing in Lublin. Rental rates and the cost of living are lower than in most major cities in Poland, which translates into financial benefits for companies.

More than 600,000 people live in the Lublin agglomeration, including more than 180,000 people with higher education. Over the past five years, more than 10,000 new jobs have been created in Lublin. In addition, the city offers access to skilled workers from Ukraine, who make up about 10% of the city's population; it is also located near the Ukrainian border, giving access to a market of more than 40 million people.

Lublin offers investors favourable conditions for business development. Its convenient location, developed education sector, business infrastructure, quality of life and government support make this city a place worth considering as an investment location.



PART 2

Infrastructure

INFRASTRUCTURE

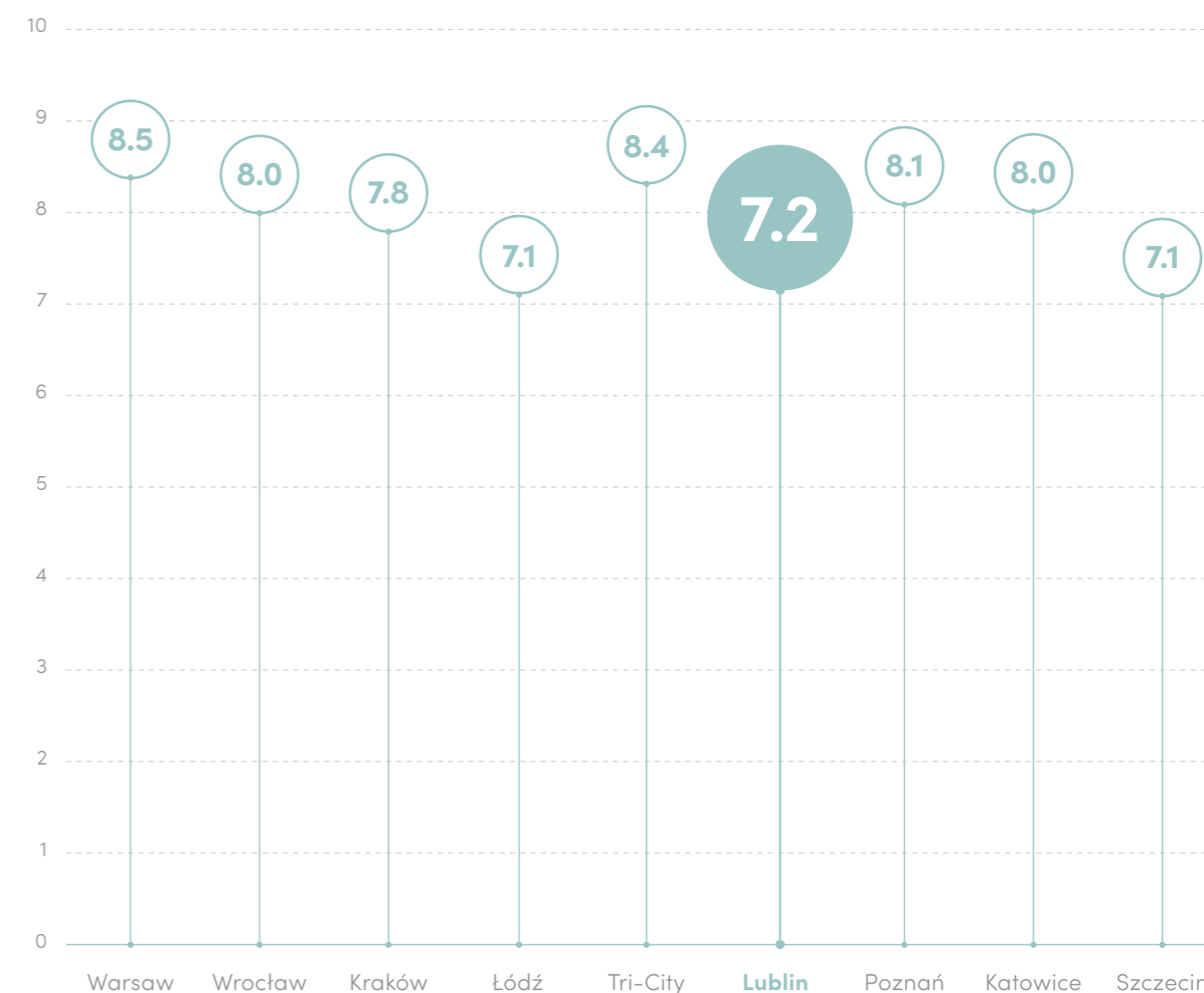
Average rating

7.2

2.01. Infrastructure

CHART 2.1.

Average infrastructure rating for Lublin



Dynamically developing infrastructure is one of the factors attracting investors.

In recent years, the city's transportation accessibility has increased, and the international airport is a landmark of the city.

The construction of a ring road, access roads, and the modernization of urban public transportation contribute to the development of infrastructure and strengthen Lublin's position on the map of Poland and Europe.

Find out more at www.investmentpotential.pl

“

Air freight forwarding is the fastest and safest method of transportation, which will not only provide Lublin companies with a wide range of export opportunities, but also allow them to import necessary goods.

AGNIESZKA GUŁAŚ

INFRASTRUCTURE

Expert commentary

Agnieszka Gułaś

SENIOR NEGOTIATOR, CUSHMAN & WAKEFIELD

Lublin is considered the capital of Eastern Poland and the largest transportation hub in this part of the country.

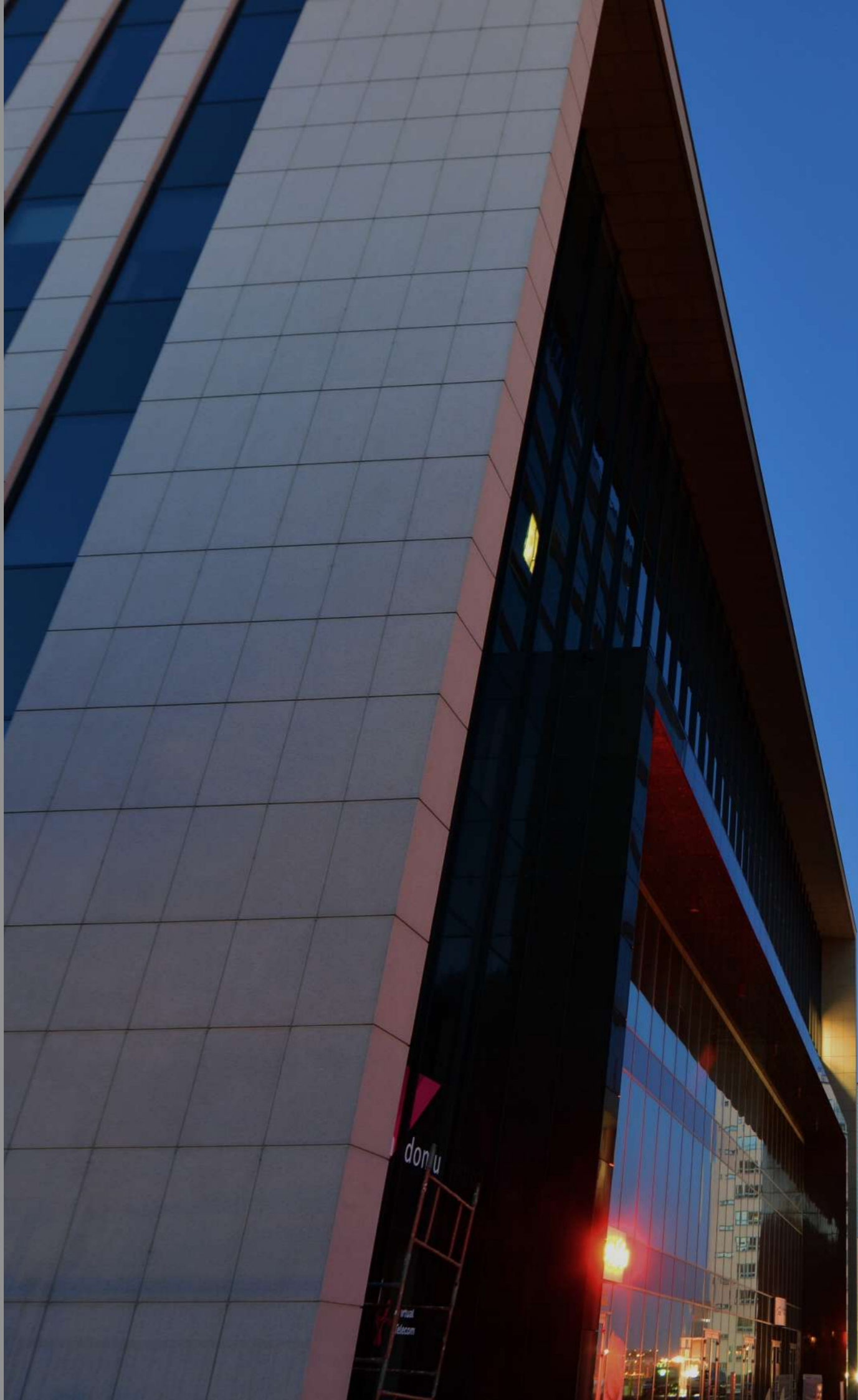
Recent years have seen the completion of the S17 road, which opened up a high-speed connection to Warsaw, and part of the S19 (Via Carpatia) between Lublin and Rzeszów, which is part of a trans-European corridor leading from Lithuania to Greece. Work is underway on the construction of another section of the S19 that will connect Lublin and Białystok. Sections of the S17 leading through Zamość to the Hrebenne border crossing and the S12 leading through Chełm to the Dorohusk crossing are under construction.

The development of road infrastructure heralds an influx of new business.

Construction of the Metropolitan Railway Station is underway and is expected to last until Q4 2023. The region's new transportation centre, located adjacent to the main PKP railway station, will integrate the city's internal transportation with regional and long-distance transport.

In March 2023, Lublin Airport SA applied for a construction permit for a cargo terminal – the new hall is scheduled for completion in 2024.

Air freight forwarding is the fastest and safest method of transportation, which will not only provide Lublin companies with a wide range of export opportunities, but also allow them to import necessary goods.



PART 3

Office space



OFFICE SPACE

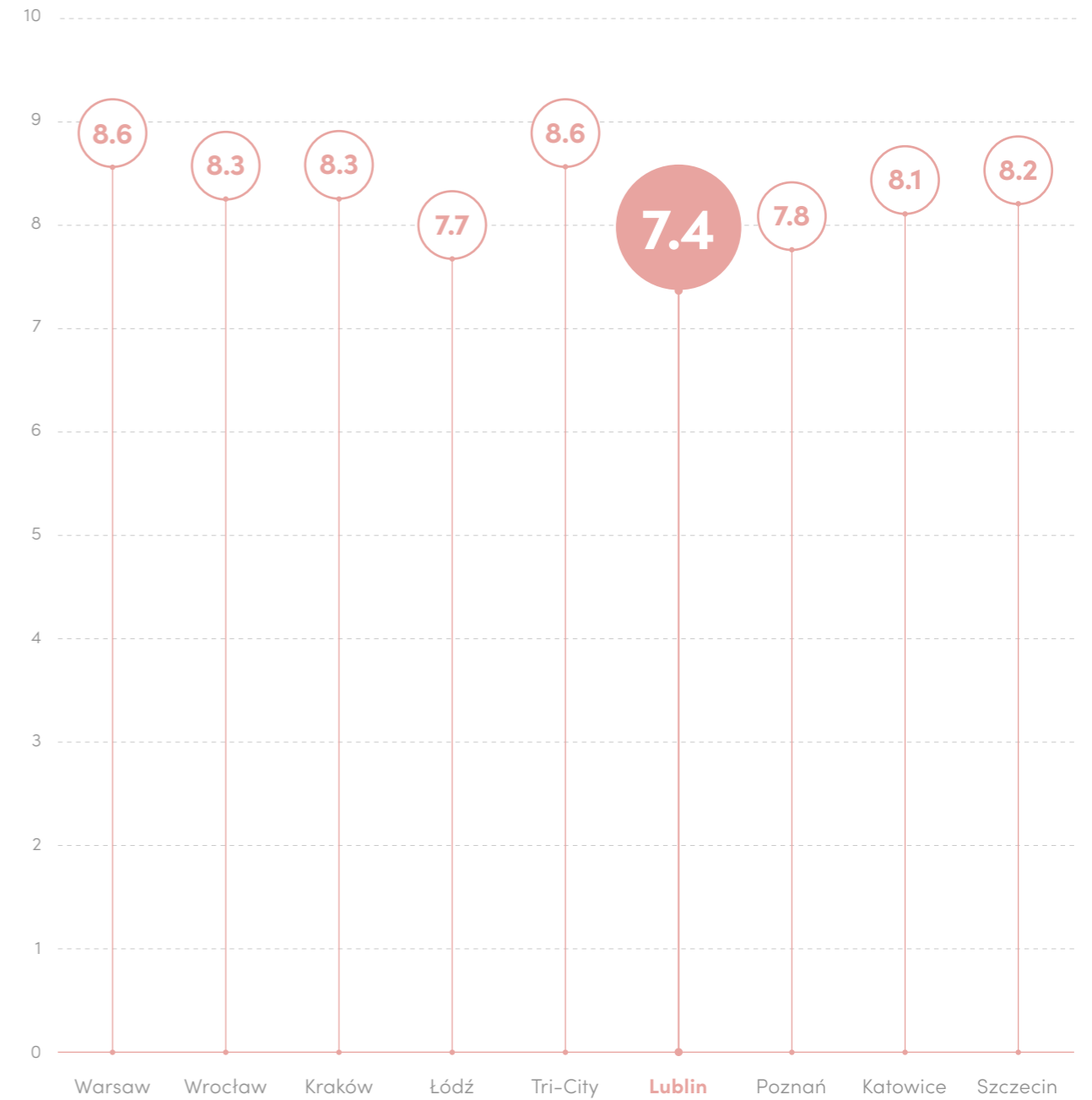
Average rating

7.4

3.01. Office space

CHART 3.1.

Average office space rating for Lublin



Find out more at www.investmentpotential.pl

3.02. Real estate in Lublin

BASIC DATA ABOUT THE REAL ESTATE MARKET

11.50-12.50 EUR/m² / month

Asking rents

50

Number of existing office buildings

0 m²

Office space under construction

0 m²

New supply

10,800 m²

Gross demand

13.1%

Vacancy rate

223,400 m²

Total stock of office space

OFFICE SPACE STOCK BY AGE

38,900 m²

0-5 years

74,500 m²

6-10 years

110,000 m²

over 10 years

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WAKEFIELD

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Lublin is the largest and most mature market in eastern Poland.

MICHAŁ GRABOWIECKI



OFFICE SPACE

Expert commentary

Michał Grabowiecki

SENIOR NEGOTIATOR, CUSHMAN & WAKEFIELD

Lublin is the seventh office market on the regional map of Poland, with 2022 resources exceeding 200,000 sqm, reaching as much as 223,400 sqm. It is the largest and most mature market in eastern Poland.

Such a large increase was ensured, among others, by the commissioning – with delay caused by the pandemic – of three office projects: CZ Office Park D (15 thousand sqm), G3 Inter Office (12 thousand sqm) and Wojciechowska 9B (6 thousand sqm).

An important development was the opening of a third service office in the local market in the second half of 2022.

LoftMill at the CZ Office Park D office building offered 240 workspaces in a 1.6 thousand sqm space.

Average rents in Class A office buildings remained at EUR 11-12.50/sqm. Despite the increase in supply, the vacancy rate has been declining regularly and stood at 13.1% in Q2 2023. High demand of more than 10,000 sqm in the first half of 2023 is responsible for this.

Several developments are currently in the design phase, the most important of which are the next phase of the CZ Office Park and Gęsia projects, as well as a new office building by local developer Orion planned at the Honorowych Krwiodawców roundabout. The implementation of these projects seems to effectively reduce the risk of a supply gap in the Lublin market.



PART 4

Public administration support

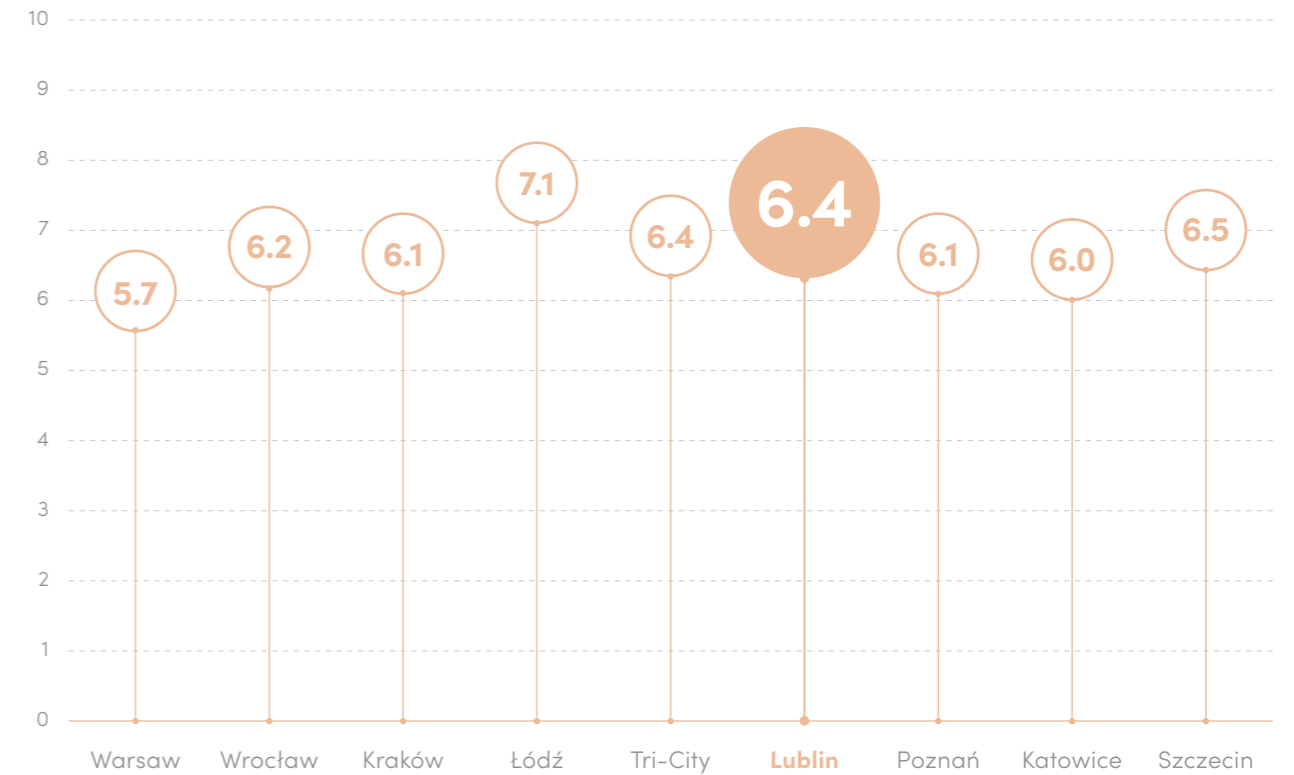
PUBLIC ADMINISTRATION SUPPORT

Average rating

6.4

4.01. Public administration support

CHART 4.1. Average rating of public administration support for Lublin



The support of the public administration in Lublin for potential investors and employers is invaluable help at every stage of investment.

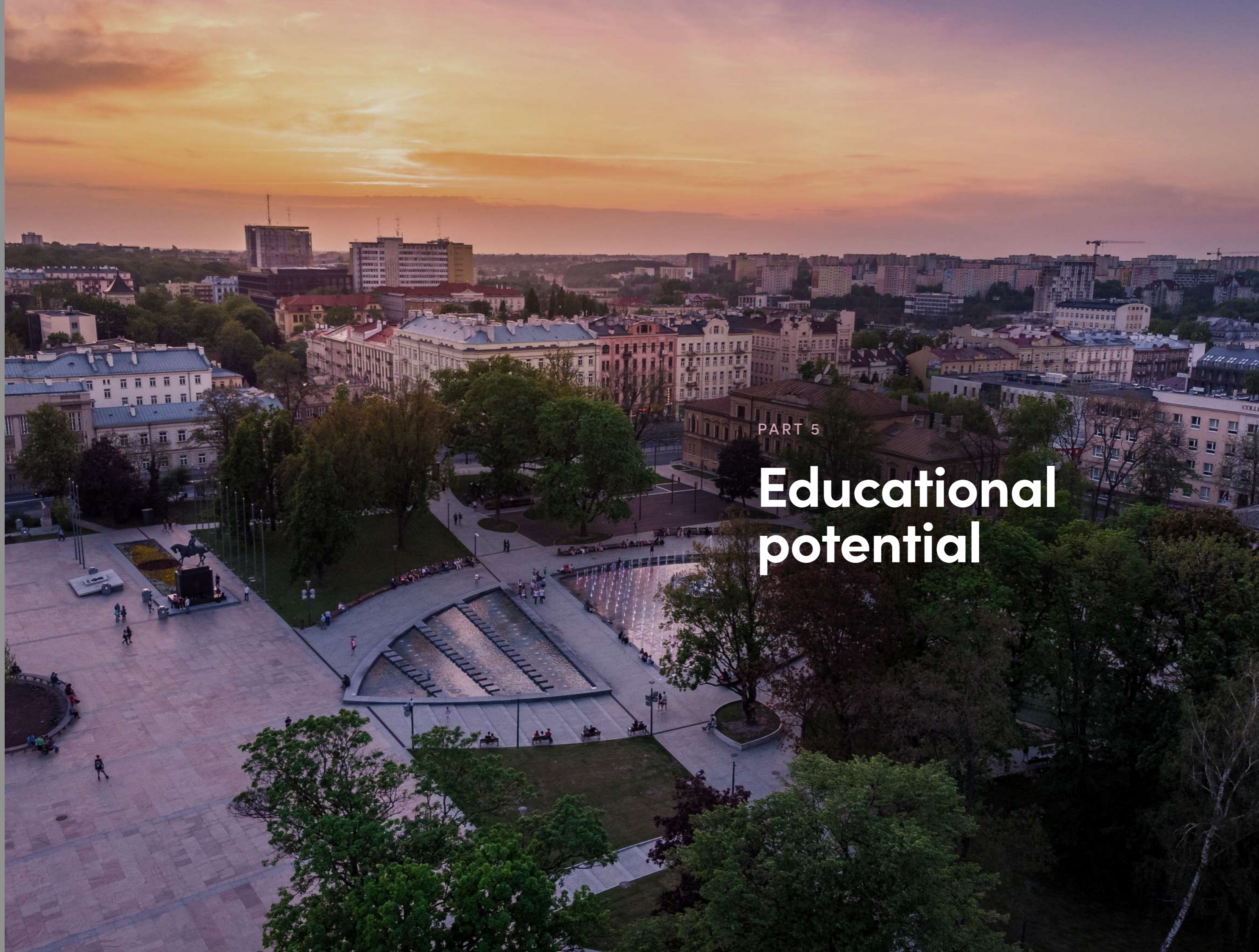
Lublin City Hall has a professional investor service team that provides reliable information and post-investment care. Each member of the team is an expert in a particular industry, building relationships and advising investors.

In addition, the Department of Strategy and Entrepreneurship offers tools such as the business.lublin.eu website and social media channels to provide essential information.

Lublin's Economic Profile on LinkedIn was highlighted in a Sotrender report as one of the most engaging and fastest-growing local government profiles in Poland.

Labour market institutions act as intermediaries between employers and job seekers, while the labour office regularly publishes reports on the labour market in Lublin and the region, which is a valuable source of information.

Find out more at www.investmentpotential.pl



PART 5

Educational potential

EDUCATIONAL POTENTIAL

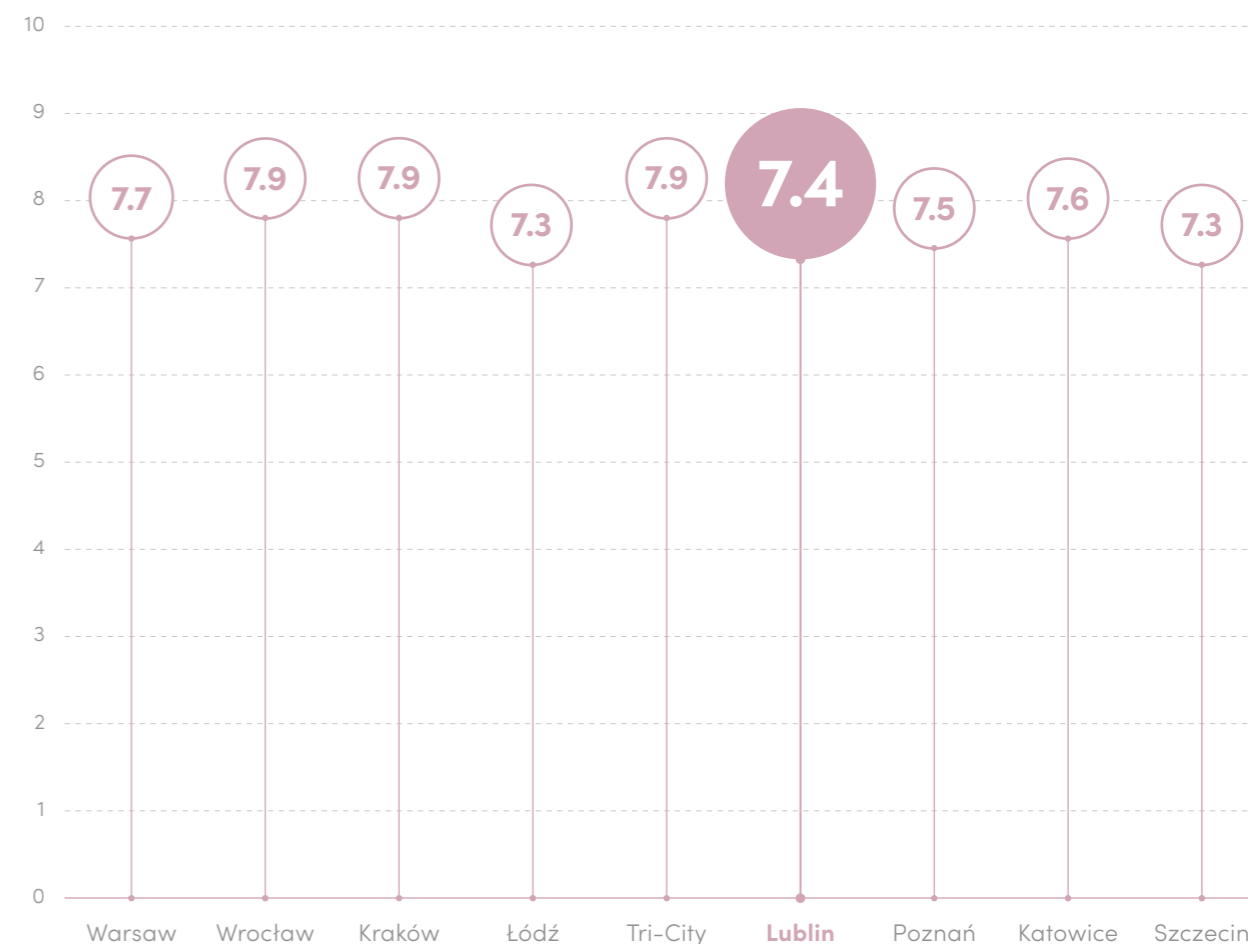
Average rating

7.4

5.01. Educational potential understood as the availability of future employees

CHART 5.1.

Average assessment of educational potential for Lublin



Lublin is one of the most vibrant academic centres in Poland.

It encourages education with a wide range of major subjects, excellent academic staff and measures to support students, including through scholarships and awards. Nearly 60,000 students study in Lublin annually, of which 8,300 were from abroad in 2021/22.

Find out more at www.investmentpotential.pl

AVAILABILITY OF **FUTURE EMPLOYEES**
IN LUBLIN

9

Number of universities

58,305

Number of students

15,259

Number of graduates

NUMBER OF STUDENTS BY AREA
OF KNOWLEDGE

1,758

Finance

3,408

Engineering

4,321

IT

1,804

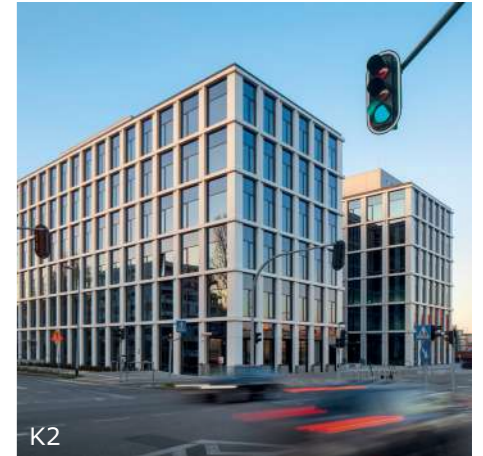
Philologies



Riverview



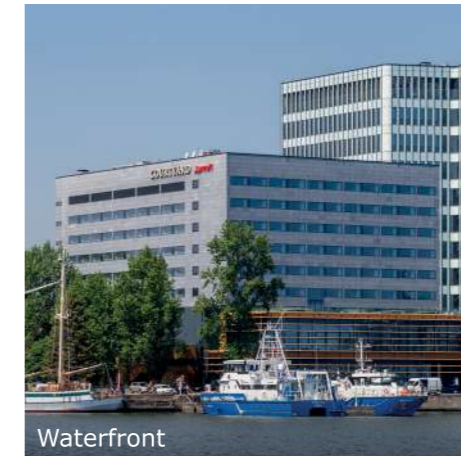
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K2



Business Garden Poznań



Waterfront



Business Garden Wrocław

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Lublin's educational potential is highly rated by experts. In *Perspektywy* magazine's 2023 ranking, Lublin ranked 5th among Polish cities in terms of academic potential.

DOMINIK KALINOWSKI

EDUCATIONAL POTENTIAL

Expert commentary

Dominik Kalinowski

HEAD OF OUTSOURCING IT SERVICES, ANTAL

Lublin is one of the leading academic centres in Poland. There are almost 60,000 students in the city, including about 45,000 at public universities. The city offers a wide range of educational opportunities, including undergraduate, graduate, postgraduate and doctoral programs.

Lublin's educational potential is highly rated by experts. In *Perspektywy* magazine's 2023 ranking, Lublin ranked 5th among Polish cities in terms of academic potential.

The city distinguished itself primarily in the "Innovation" category.

Through the prism of educational potential, Lublin is an attractive place for investors.

The city offers employers a number of benefits from the wide range of specialists that feed into the labour market year after year, making it easier to access qualified personnel and lowering recruitment costs.

In conclusion, Lublin is an important academic centre in Poland.

The city offers a rich educational and attractive living environment, as well as access to a skilled workforce, which can translate into increased competitiveness for the company.



PART 6

Employment potential

EMPLOYMENT POTENTIAL

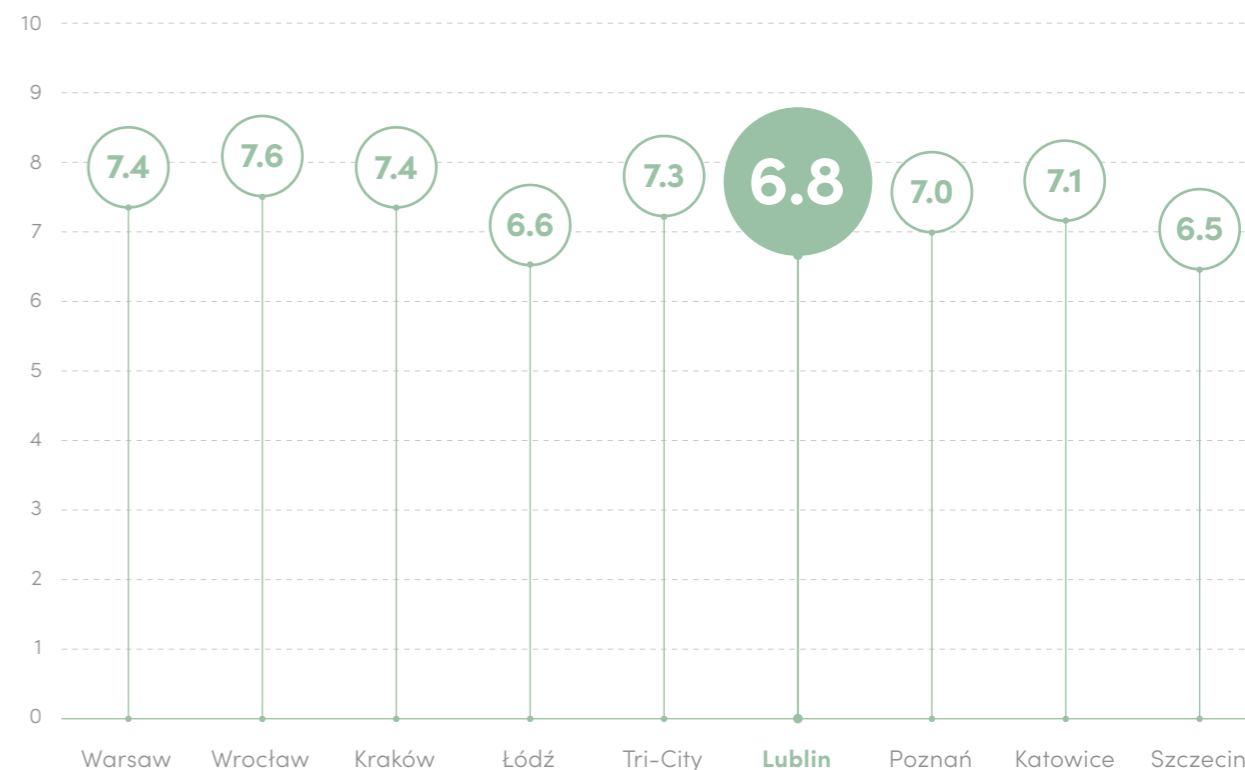
Average rating

6.8

6.01. Employment potential

CHART 6.1.

Average employment potential rating for Lublin



LABOUR MARKET INDICATORS OF THE LUBLIN VOIVODESHIP

2,024,637

Population

8.1%

Unemployment rate

204,548

Average employment in the enterprise sector

6,122.55 PLN

Average gross monthly salary in the enterprise sector

Find out more at www.investmentpotential.pl

6.02.

Sample salaries in Lublin

GROSS MONTHLY SALARIES (PLN)

Manufacturing and Logistics Sector	min.	max.
Production worker (unskilled)	3,600	5,000
Production worker (skilled)	4,300	6,000
Shift Manager	6,500	12,000
Logistics specialist	6,000	8,000
Logistics manager	10,000	15,000
Production engineer	6,500	10,000
SSC/BPO Sector	min.	max.
GL Accountant (2-3 years of experience)	7,000	9,000
GL Senior Accountant (over 3 years of experience)	9,000	11,000
GL Team Leader (team of 5-15 people)	11,000	14,000
AP/AR Accountant (2-3 years of experience)	5,500	7,000
AP/AR Senior Accountant (over 3 years of experience)	6,500	8,500
AP/AR Team Leader (team of 5-15 people)	9,000	11,000
CS Junior Specialist (no experience)	4,500	6,000
CS Specialist (over 1 year of experience)	6,000	7,500
CS Team Leader (team of 5-15 people)	9,000	12,000
Payroll Specialist (1-3 years of experience)	5,000	8,000
Senior Payroll Specialist (over 3 years of experience)	7,500	10,000
Payroll Team Leader (team of 5-15 people)	11,000	13,000
IT Sector	min.	max.
1st Line Support (2 years of experience)	7,000	9,000
2nd Line Support (2 years of experience)	9,500	11,000
3rd Line support (2 years of experience)	11,000	14,000
IT Administrator (3 years of experience)	12,000	15,000
Business / System Analyst (3 years of experience)	14,000	18,000
Fullstack Developer (3 years of experience)	17,000	21,000
Frontend Developer (3 years of experience)	15,000	21,000
Backend Developer (3 years of experience)	14,000	20,000
Devops (3 years of experience)	17,000	21,000
Manual Tester (3 years of experience)	8,000	11,000
Automatic Tester (3 years of experience)	14,000	18,000
Team Leader (dev) (team of 5-15 people)	22,000	27,000

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“

The advantage of the Lublin labour market is the diverse availability of specialists, experts with IT skills, as well as sales, accounting, finance, administrative or language skills.

ALEKSANDRA KURASIEWICZ

EMPLOYMENT POTENTIAL

Expert commentary

Aleksandra Kurasiewicz

SENIOR CLIENT & TEAM MANAGER, ENGINEERING & OPERATIONS, ANTAL

Lublin and the Lubelskie voivodeship have for several years been a frequently considered and chosen region among companies looking for a convenient location to locate businesses.

The city's undoubted advantage is its high academic base, with nine universities churning out 15,000 to 20,000 graduates each year. That's an impressive number. This creates an excellent environment for managing available talent. It is not surprising that entrepreneurs and foreign investors take a keen interest in the region and decide to choose it.

The advantage of the Lublin labour market is the diverse availability of specialists, experts with IT skills, as well as sales, accounting, finance, administrative or language skills.

Over the past four years, there has been a noticeable revival in the successive manufacturing plants being built, providing jobs for both production workers and those in specialized, engineering or managerial positions. In the last few years alone, such companies as the German company Data Modul, which opened in Lublin's Felin, the French Varroc Lighting Systems (now Plastic Omnium) in Germany, the Turck company or the most recent investment by Trilux, which chose Świdnik for a production and research project, have invested there. The attractiveness of the Lublin region has undoubtedly been boosted by the launch of

the S17 route, and if we are talking about transportation and Świdnik, it is also worth mentioning the investment of DB Schenker, which opened a branch in the Świdnik Economic Activity Zone.

The city's investment climate, as well as the rapidly growing office space market, are fostering increased interest in Lublin as an attractive business development destination.



PART 7

Business potential

BUSINESS POTENTIAL

Average rating

6.8

7.01.
Business potential

CHART 7.1.

Average business potential rating for Lublin



The city's investment climate, as well as a thriving office space market, is fostering the growth of the modern services and information technology sectors.

Lublin's economic traditions and the region's geography contribute to the development of the automotive, logistics, biotechnology and food processing industries.

The activity of companies in the modern business services and IT sectors has increased over the years.

Currently, there are dozens of BPO/SSC/IT centres in the city, which already employ more than 8,000 people in Lublin. An analytical team from the *Financial Times Group* has named Lublin one of the most attractive cities for business in Poland in terms of location for foreign direct investment.

Find out more at www.investmentpotential.pl

“

The city should strive for the emergence of more investments, especially in the modern business services market, which will have a positive impact on wages.

MACIEJ DUDKOWSKI

BUSINESS POTENTIAL

Expert commentary

Maciej Dudkowski

MANAGER, PwC

As the largest urban centre on the eastern side of the Vistula River, Lublin creates an environment conducive to new investments. The city has enormous human potential, mainly due to its numerous public and private universities.

Graduates are a group of ambitious people with good language skills and a desire to develop careers in Lublin.

Another of the city's strengths is the very high level of local government involvement.

Initiatives related to raising the competence of local residents and building and deepening cooperation between the business and academic communities support and facilitate investment development.

They allow potential candidates to find out what work in companies operating in the city is all about, and to learn about employers' expectations of employees.

In recent years, Lublin's attractiveness among residents of other cities has increased, resulting in an increasing number of people seeking to find employment here.

The city should strive for the emergence of more investments, especially in the modern business services market, which will have a positive impact on wages, thereby raising the standard of living of residents.

For PwC, the priority is to create more than 300 jobs here within two years.

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7.02.

Selected companies in and around the city

Banking

PEKAO FAKTORING
PKO BP
SANTANDER BANK POLSKA
SOLLERS CONSULTING
SYGNITY

SSC/BPO

ADECCO LUBLIN
ALTO ACCOUNTING
CASHDIRECTOR SA
CONCENTRIX
CUSHMAN&WAKEFILED
CYBER PRODUCTIVITY
EOS KSI
EURO RTV AGD
FINANTEQ
GENERALI
GENPACT
INPL GROUP
KONICA MINOLTA BUSINESS SOLUTIONS POLSKA
NOCOWANIE.PL
OEX VOICE CC
ORANGE
PHLEXGLOBAL POLAND
PROSERVICE FINTECO
PUBLICIS RE:SOURCES
PWC ADVISORY
QUAD GRAPHICS
RANDSTAD PAYROLL SOLUTIONS
TUTLO
VISTRA POLAND
WARTA24

IT & Telecommunications

300DEVs
ARCUS SYSTEMY INFORMATYCZNE
ASSECO BUSINESS SOLUTIONS SA
BILLENNIUM SA
BRITENET
CAPGEMINI POLSKA
COMARCH SA
COMPUGROUP MEDICAL POLSKA
DATAART POLAND
DOGTRONIC
EDGE ONE SOLUTIONS
ELEADER
EMBIQ
INETUM POLSKA
INFINITE
LINGARO
MOBICA
ONWELO
PREDICA
PWC IT SERVICES
PYRAMID GAMES S.A.
SII
TRANSITION TECHNOLOGIES-SOFTWARE
ZETO
Construction
BUDOP
EDACH
EKSAM BUDOWNICTWO
JS BUDOWNICTWO
KONBUD
Industrial production
ABM GREIFFENBERGER
BALL PACKAGING

BONIONI
CEWAR
CHEMNOVATIC
DAEWON EUROPE
DATA MODUL
ELPES
JADAR
KOSTAL
LIFT-SERVICE
MW LUBLIN
NESOBUS PAK-PCE
NEXTEAM
PLASTIC OMNIUM
SIPMA
SKYFENS
TARASOLA
TRILUX

Energy & Heat

LUBELSKIE PRZEDSIĘBIORSTWO ENERGETYKI CIEPLNEJ S.A.
MEGATEM EC LUBLIN
PGE DYSRYBUCJA

Trade

BLACK RED WHITE
BURY TRADE
FELICITY
GALA LUBLIN
INTER CARS
LEMONEX
MASTERMEDIA CIOCZEK I WÓJCIAK
MEBLOHURT
OLIMP
RYNEK ELIZÓWKA
STANDARD

PART 8

Assessing the location as a place to live



ASSESSING THE LOCATION AS A PLACE TO LIVE

Average rating

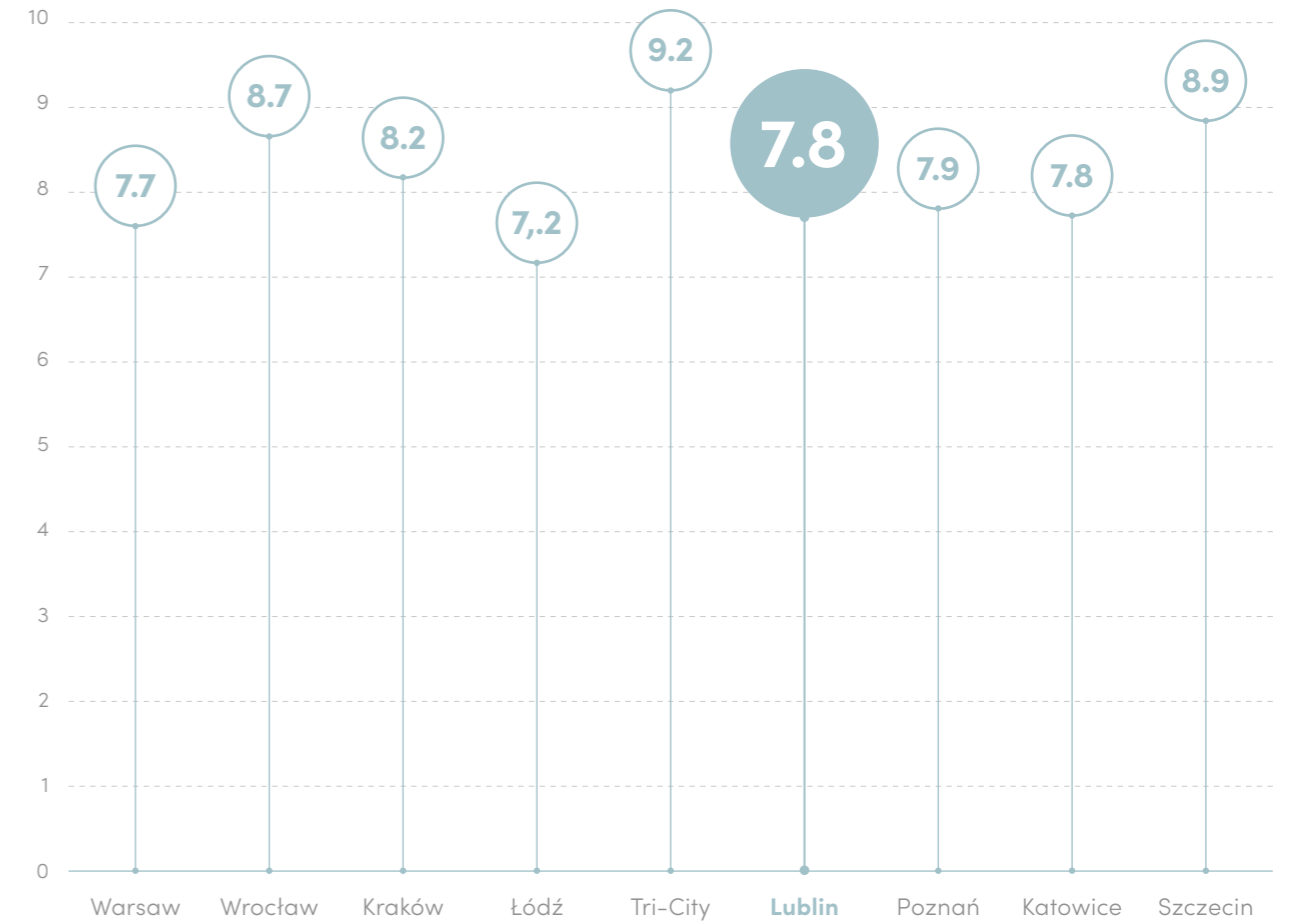
7.8

8.01.

Assessing the location as a place to live

CHART 8.1.

Average rating of Lublin's location as a place to live



The city's rich architecture and long history give it a unique character.

Lublin lies on the northern edge of the Lublin Upland, and is divided by the Bystrzyca River Valley into two different landscapes: the left bank with picturesque valleys and the right bank on the Świdnik Plateau.

Lublin is a venue for international conferences, cultural festivals and contemporary art, with a wide range of theatres and galleries.

The city hosts events such as the Carnival Sztukmistrzów, the Inne Brzmienia festival and the Jagiellonian Fair.

Find out more at www.investmentpotential.pl

8.02.

Lublin as a place to live

DATA ON TOURISM AND CULTURAL DEVELOPMENT
OF THE CITY

411,000

tourists visited Lublin in 2022.

1

PLACE

in the Europolis report – *Green Cities*, compiled by the Polish Robert Schuman Foundation¹.

635

city bicycles spread across 129 stations.

11%

of Lublin's area is made up of forests.

¹ Zielone miasta polskie na rzecz klimatu, środowiska i zdrowia mieszkańców, Europolis 2021.

LUBLIN AS A PLACE TO LIVE

Basket of goods and services in comparison with other urban centres

	Warsaw	Wrocław	Kraków	Łódź	Tri-City*	Lublin	Poznań	Katowice	Szczecin
Prices of apartments on the primary market [PLN/1 sqm] ¹⁾	13,135	11,397	11,669	8,810	11,384	8,856	10,067	9,226	10,748
Prices of apartments on the secondary market [PLN/1 sqm] ¹⁾	12,199	10,234	11,018	6,366	10,899	8,016	8,346	6,482	7,733
Average rental price for the city [PLN] ²⁾	5,037	3,130	3,147	2,247	3,499	2,448	2,437	2,347	2,630
Price of a 1-person room for a student [PLN] ³⁾	1,450	1,400	1,200	950	1,450	900	1,000	1,000	1,100
Number of children in nurseries and children's clubs per 1,000 children under 3 years of age ⁴⁾	314	360	362	242	244	342	291	376	285
Monthly cost of public transport ticket for an adult, without concessions and discounts, for Zone I in case of division [PLN]	110	110	159	168	117	128	149	109	140

¹⁾ Residential real estate price database, NBR, 2nd quarter of 2023

²⁾ Based on the data available at Otodom.pl, average rent prices in selected cities in July 2023

³⁾ PKO BP: PULS NIERUCHOMOŚCI: AAAAA STUDENT SZUKA MIESZKANIA September 28, 2022. – Average market rental prices per room in large-panel blocks of flats (data for the Tri-City is for Gdansk in this case)

⁴⁾ Statistics Poland, 2019 (Tri-City, excluding Gdynia and Sopot)

* Tri-City, excluding Gdynia and Sopot



SURVEY BY ANTAL AND CUSHMAN & WAKEFIELD

Methodology

Methodology

The Business Environment Assessment Study was conducted using the CAWI method among **1,290 decision-makers** of companies in Poland from **31.07-25.08.2023**.

Sources of data used in the report on the website:
www.investmentpotential.pl



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Cushman & Wakefield
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