

SURVEY BY ANTAL AND CUSHMAN & WAKEFIELD

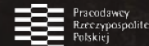
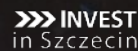
Investment potential of Szczecin

Edition 4

Strategic Partners:



Agencja Rozwoju Metropolii Szczecińskiej sp. z o.o.



City partners:

Honorary Patrons:

Patrons:



SURVEY BY ANTAL AND CUSHMAN & WAKEFIELD

Investment potential

SZCZECIN



“

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,
- 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 Szczecin 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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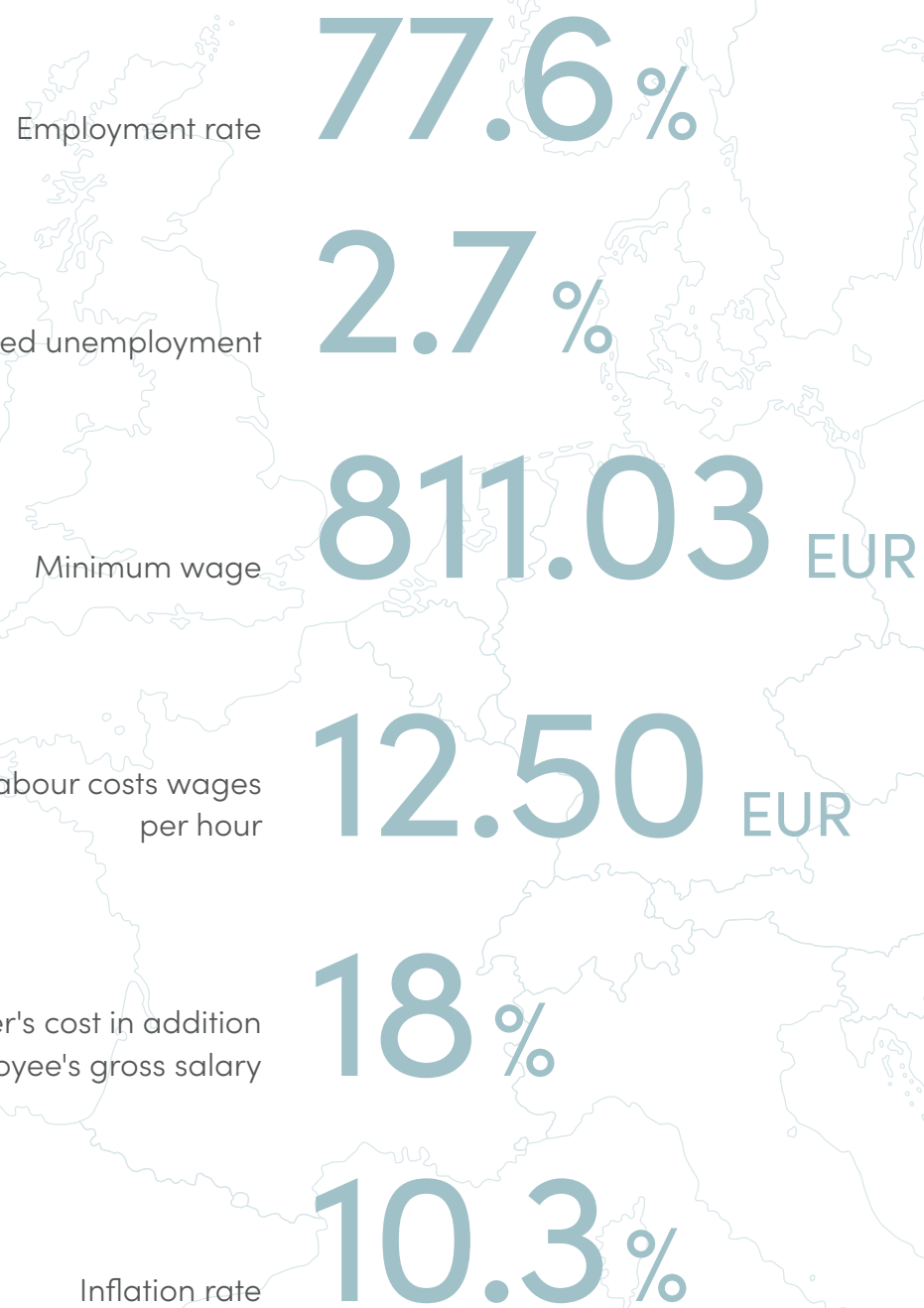


INVESTMENT POTENTIAL

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

Szczecin – introduction

HOTEL

SZCZECIN

Average rating

7.5

1.01.

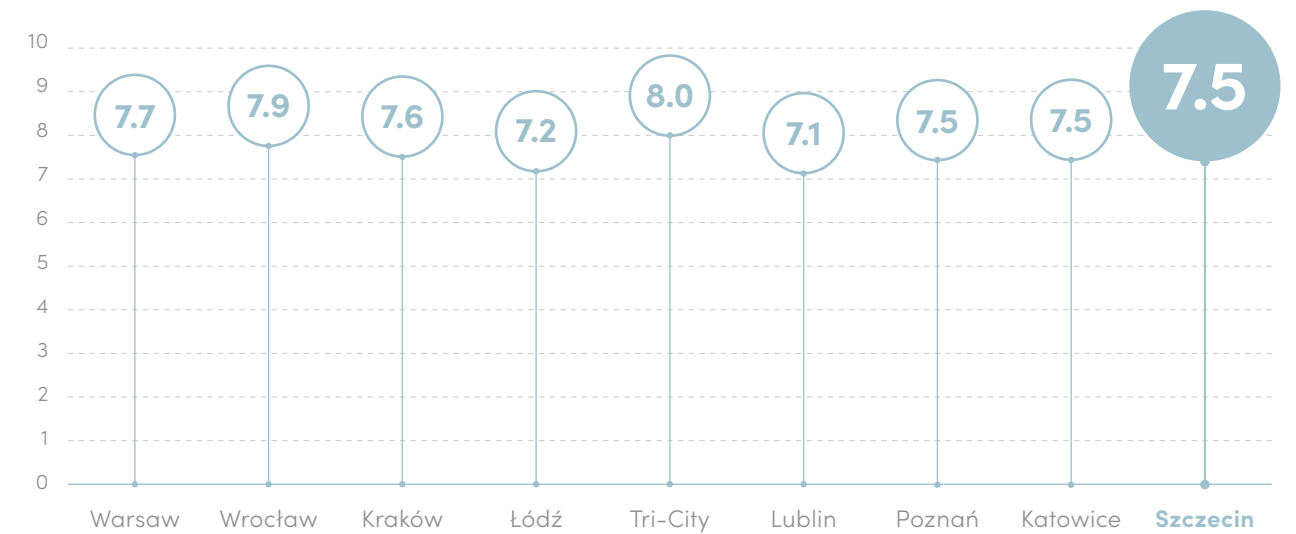
Szczecin assessment

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 Szczecin



Szczecin is a dynamically developing city in Poland, being an important economic, cultural and scientific centre. It shows great investment potential, as evidenced by a rating of 7.5.

The city is known for its business-friendly approach, which attracts reputable companies, both domestic and foreign.

Szczecin boasts access to qualified specialists, a strong academic base, developed infrastructure and a high level of local government support.

The region is attracting leaders in various fields, such as information technology, renewable energy, logistics and shared service centres.

Find out more at www.investmentpotential.pl



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Our attention today is focused on renewable energy sources, and especially on elements related to offshore wind energy.

PIOTR KRZYSTEK

SZCZECIN – INTRODUCTION

Expert commentary

Piotr Krzystek

MAYOR OF SZCZECIN

Szczecin is a unique place in every respect. Beautiful architecture, rich cultural offerings. The city offers also attractive leisure activities: marinas, boulevards, golf courses, wild backwaters of the Oder River.

Szczecin is a green city – as much as 30 percent of its area is made up of forests, parks and squares.

Our location, natural conditions and eco-friendly approach put us at a breakthrough moment.

Our attention today is focused on renewable energy sources, and especially on elements related to offshore wind energy. The potential of Szczecin and our voivodeship in this regard has no equal.

We have the potential to become a Polish offshore hub. This scenario is already coming to fruition. Key elements of the process are emerging.

The construction of an installation terminal has started in Świnoujście, where the reloading, storage and assembly of wind tower sections with foundations and other wind turbine elements will be carried out. Among other things, the terminal will enable the construction of Baltica Power's first offshore wind farm.

Powerful offshore companies want to build their factories in Szczecin.

First, Denmark's Vestas announced the launch of production of components for wind farms, and more recently, Spain's Windar and the Szczecin and Świnoujście Seaports Authority signed a preliminary lease agreement for land located in Ostrów Grabowski.

A state-of-the-art factory for manufacturing wind towers is to be built there. In addition, together with Orlen Neptun, we are co-creating the Polish Offshore Competence

Centre (pol. *Centrum Kompetencji Polskiego Offshore*). We will train human resources for the industry.

It should be clear that all these investment activities will generate thousands of new, well-paid jobs, attract more investors and boost our economy.

For several years, Szczecin has also been increasingly noticed by investors looking for new locations for office and warehouse investments.

This area is a relatively young but rapidly growing market. The warehousing sector is also unique because of the Port of Szczecin, which provides the opportunity for cargo to reach the farthest inland by water.

There are large warehouse parks, standalone BTS facilities, smaller facilities and small urban warehouses in our region.

Another advantage is the ability to handle cargo goods through the Szczecin-Goleniów Airport.

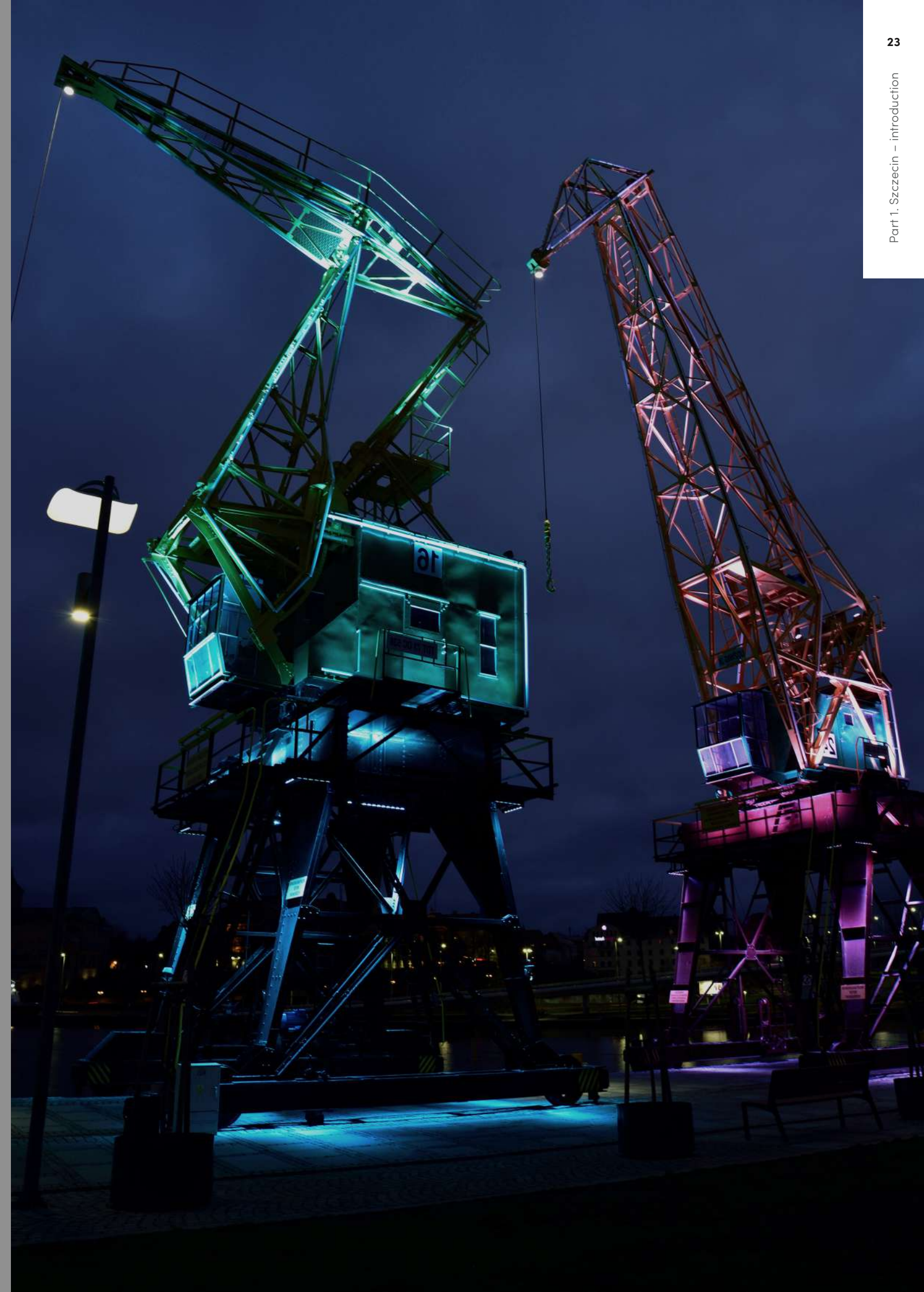
At the beginning of 2023, the total stock of the warehouse market reached nearly 1.15 million sqm. As much as 85% of this space, or nearly 1 million sqm, was delivered during the last six years.

Developers are building or planning new projects, recognizing the region's growing logistics potential.

More square meters of warehouse space are currently under construction, and a secured land bank makes it possible to deliver an additional one million square meters of modern space over the next few years.

Szczecin has been developing in the right direction for years. However, we do not rest on our laurels, we are expanding our investment offer and preparing new projects.

Any investor interested in locating their business in our city can count on professional support from our side.





PART 2

Infrastructure

INFRASTRUCTURE

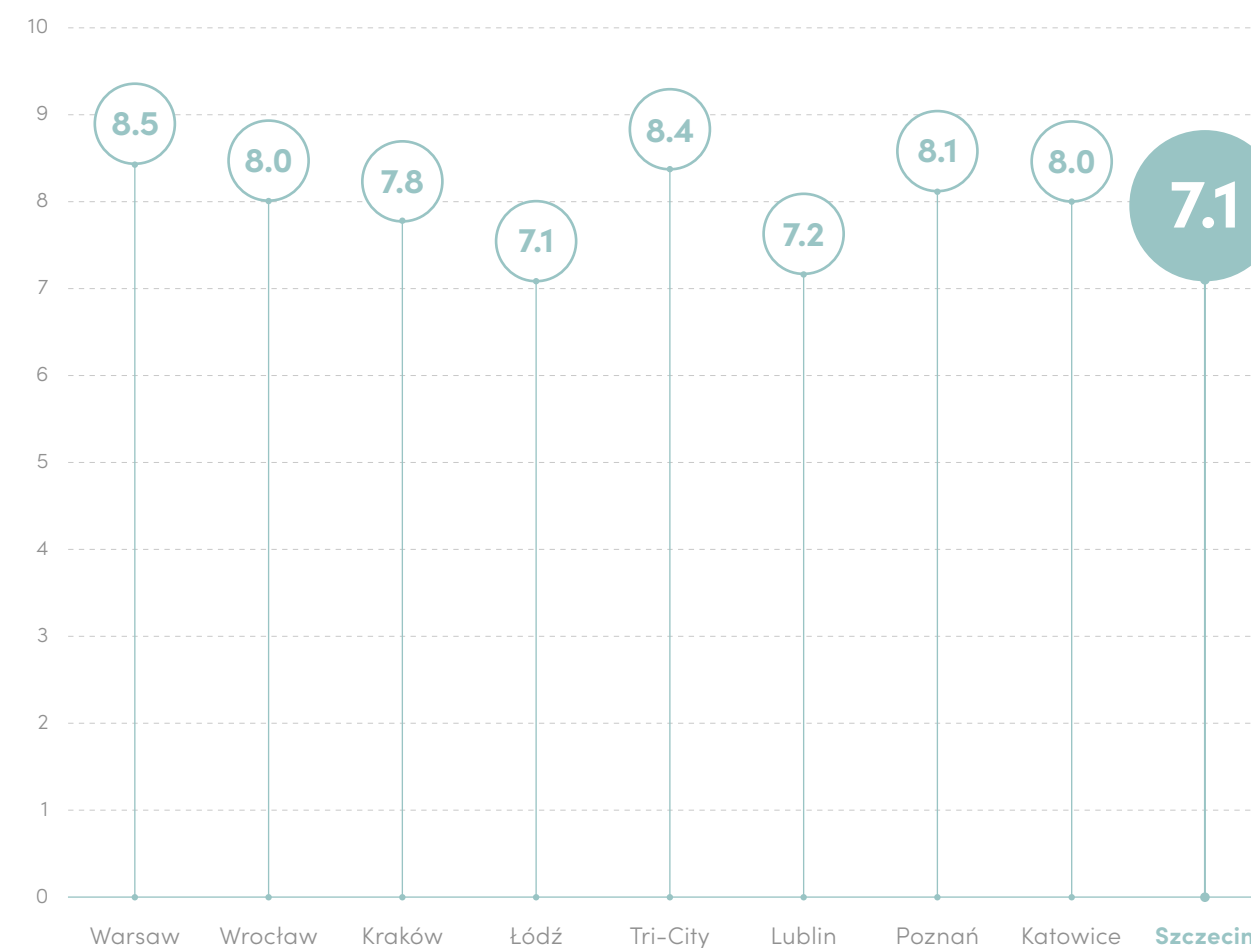
Average rating

7.1

2.01.
Infrastructure

CHART 2.1.

Average infrastructure rating for Szczecin



Szczecin is home to the Szczecin-Świnoujście Port, which is one of the largest port complexes in the Baltic Sea region, and the Oder-Havel Canal, giving the city access to the European inland navigation system and river ports in Western Europe.

The Szczecin-Goleniów Airport, connections to Western European motorways and to new

express ways and motorways in Poland, as well as an extensive rail network are also important elements of the infrastructure.

Thanks to its well-developed transport infrastructure, Szczecin plays a key role in international trade and communication, which contributes to dynamic economic development.

Find out more at www.investmentpotential.pl

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The city is also steadily investing in bike lanes and redeveloping the city's most congested areas.

ZUZANNA KRECH

INFRASTRUCTURE

Expert commentary

Zuzanna Krech

ASSOCIATE, REGIONAL DIRECTOR CENTRAL POLAND, CUSHMAN & WAKEFIELD

Szczecin is located at an attractive junction of an extensive network of transportation links. The proximity of Germany, Scandinavian countries, as well as the ports in Szczecin and Świnoujście define the city and its surroundings as an important economic, academic, cultural and tourist centre.

All land, air, rail and sea transport routes intersect here, facilitating transit between European and Baltic countries.

The location, along with extensive infrastructure and a skilled workforce, is attracting investors from Europe.

Many companies in the logistics sector have located their headquarters and main warehouses here. The maritime, technology, high-tech, IT or automotive industries are also actively developing.

Construction is underway on the S6 express way, which will connect the Szczecin agglomeration with the Tri-City.

Further planned road investments will benefit the road connection to the centre and south of Poland.

The city is also steadily investing in bike lanes and redeveloping the city's most congested areas.



PART 3

Office space

OFFICE SPACE

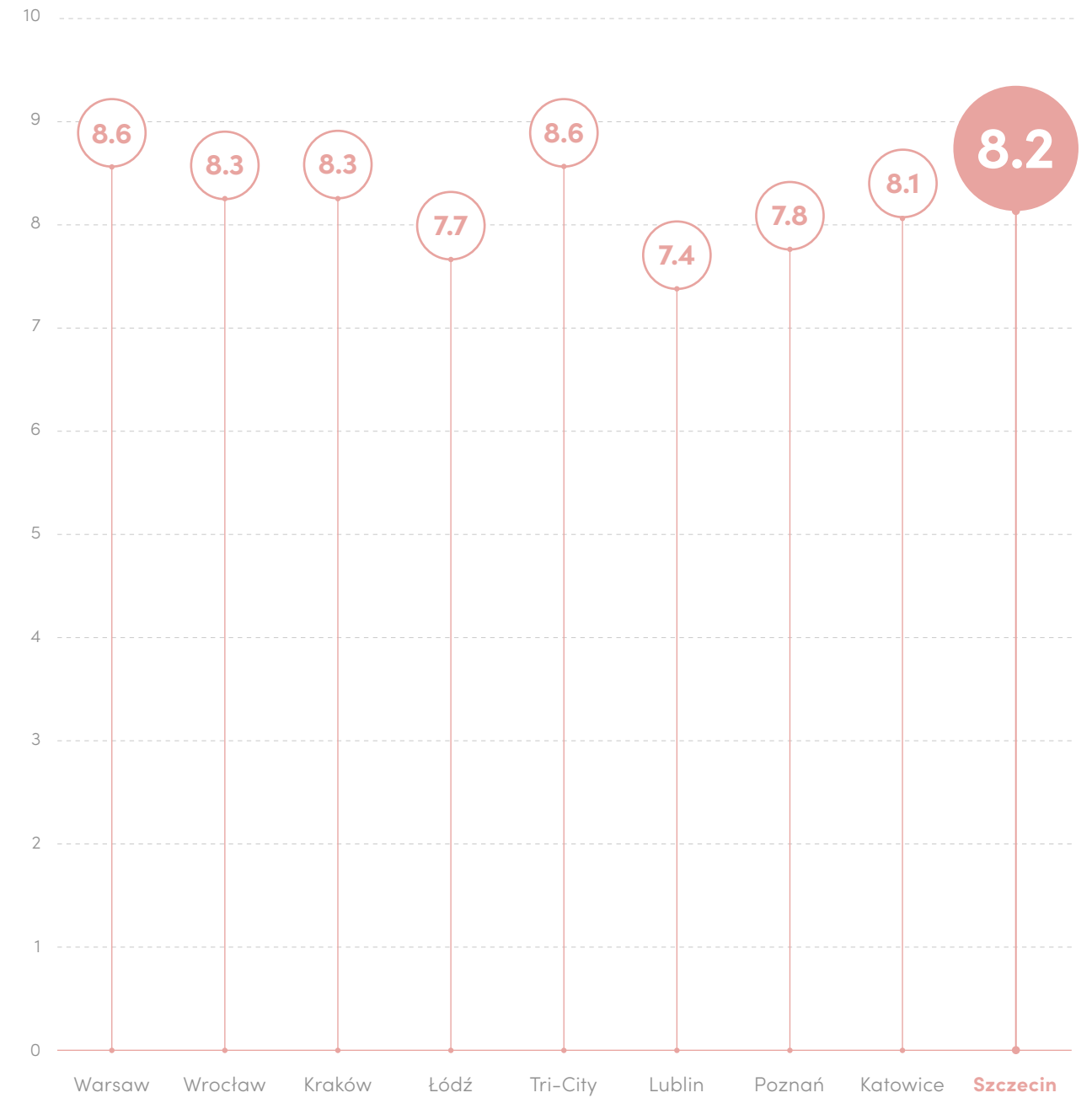
Average rating

8.2

3.01. Office space

CHART 3.1.

Average office space rating for Szczecin



Find out more at www.investmentpotential.pl

3.02.

Real estates in Szczecin

BASIC DATA ABOUT THE REAL ESTATE MARKET

12.75–13.30 EUR/m²/month

Asking rents

38

Number of existing office buildings

0 m²

Office space under construction

0 m²

New supply

6,300 m²

Gross demand

4.4%

Vacancy rate

186,000 m²

Total stock of office space

OFFICE SPACE STOCK BY AGE

28,000 m²

0–5 years

26,500 m²

6–10 years

131,500 m²

over 10 years

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square feet of property under management and 50,000 employees in 60 countries, we make an impact around the world. Explore more at cushmanwakefield.com.

WAKEFIELD

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Szczecin needs new office projects, as the number of potential tenants continues to grow.

ZUZANNA KRECH

OFFICE SPACE

Expert commentary

Zuzanna Krech

ASSOCIATE, REGIONAL DIRECTOR CENTRAL POLAND, CUSHMAN & WAKEFIELD

The development of the office market in Szczecin has great potential, if only because of the city's unique location – it is not without reason that it is said to be a gateway to the west and north of Europe.

This fact is confirmed by the investment decisions of many companies that have located their business headquarters here, as well as their main warehouses, taking advantage of Szczecin's strategic location, which gives access to all modes of transportation.

The potential for further development of the office market is confirmed by the numbers – the total stock of office space in Szczecin is 186,000 sqm, or just 3% of the supply of the entire country.

Meanwhile, the annual demand for offices in 2022 was 10,700 sqm, while the space completed in the same period was only 1,500 sqm.

This clearly shows that the city needs new office projects, as the number of potential tenants continues to grow.

Scandinavian and German companies representing industries such as logistics and e-commerce, maritime, BSS, biotechnology and medical technology are particularly active.

These investors are looking for modern, comfortable and well-connected offices, on which they often depend for their business decisions. Meanwhile, local developers are primarily active in Szczecin, and the city is fighting back with the slogan “*Szczecin is too far away*”.

The base rent per sqm of office space rental remains at an average of €13.50/month. At the same time, due to limited supply, the tenant incentive package is limited.



PART 4

Public administration support

PUBLIC ADMINISTRATION SUPPORT

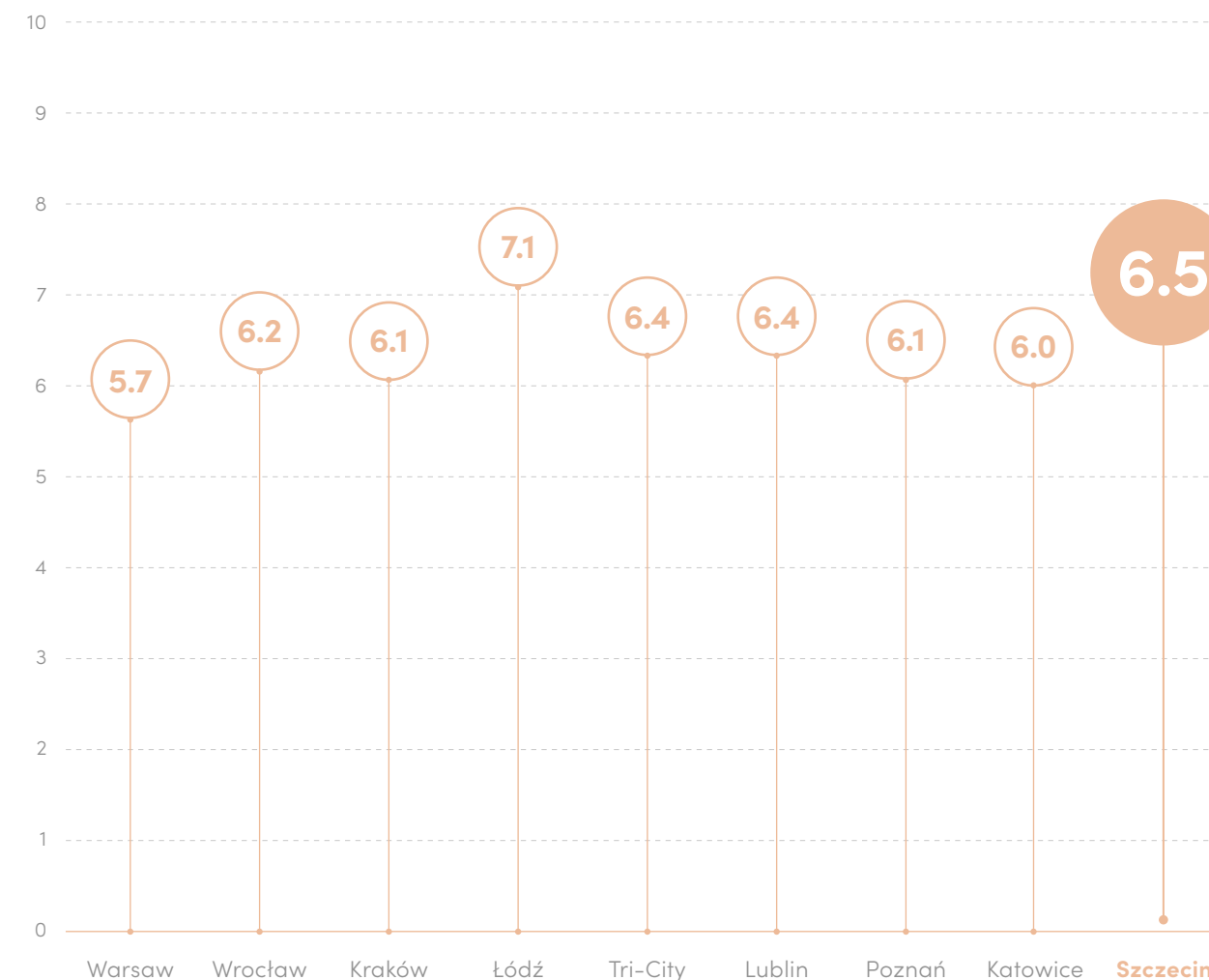
Average rating

6.5

4.01. Public administration support

CHART 4.1.

Average rating of public administration support for Szczecin



There are a number of business environment institutions actively operating in Szczecin, which are at the disposal of entrepreneurs.

Their activities are aimed at anyone interested in business development in Szczecin.

Entrepreneurs can count on the support of The Agency of Development of the Szczecin Metropolis (ARMS), the Northern Chamber of Commerce, the Szczecin Science and Technology Park – Technopark Pomerania, the Regional centre for Innovation and Technology Transfer and many other organizations.

Find out more at www.investmentpotential.pl



PART 5

Educational potential

EDUCATIONAL POTENTIAL

Average rating

7.3

5.01.

Educational potential understood as the availability of future employees

CHART 5.1.

Average assessment of educational potential for Szczecin



Nearly 27,000 students study in Szczecin. The city is home to many excellent universities, such as the Maritime University of Szczecin, the Pomeranian Medical University, the University of Szczecin and the West Pomeranian University of Technology.

The city supports students by offering them, among others: research scholarships, awards for the best diploma theses and residential programs.

Universities in Szczecin are also keen to cooperate with business, running innovation centres and helping students build their careers.

Find out more at www.investmentpotential.pl

AVAILABILITY OF **FUTURE EMPLOYEES**
IN SZCZECIN

16

Number of universities

26,769

Number of students

5,651

Number of graduates

NUMBER OF STUDENTS BY AREA
OF KNOWLEDGE

1,695

Finance

2,556

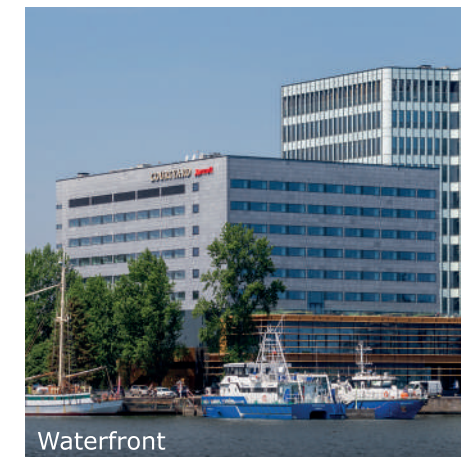
Engineering

1,762

IT

1,144

Philologies



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Vastint Poland is part of the Vastint Group, an international real estate organization operating on the European market for over 30 years. The cornerstones of our operations are the management of portfolio properties and the development of office, residential and hotel projects that provide comfortable and sustainable living, working and leisure environments.

VASTINT

www.vastint.eu

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The city focuses on the development of the university, the quality of education, as well as development towards opening up science to business.

OLIWIA PŁOSKA

EDUCATIONAL POTENTIAL

Expert commentary

Oliwia Płoska

SENIOR CONSULTANT, ANTAL SSC/BPO

The educational offer of Szczecin is wide, students can choose from more than 160 majors at 16 universities, public and non-public. The most frequently chosen University of Szczecin educates students in many specializations, but graduates of finance, accounting and philological faculties acquire the skills and knowledge most desired on the market today.

The city focuses on the development of the university, the quality of education, as well as development towards opening up science to business so that both sides can draw inspiration and develop branches of the economy.

International organizations willingly meet the needs of young, inexperienced people by offering internships and jobs after graduating, e.g. economic technicians, which are at a high level. Education, the acquisition of expertise responds to the needs of business and makes the region attractive for new investments.

A great example of university-business cooperation is the event organized for the third time, entitled "Szczecin Biznes Inspiracje" (ang. "Szczecin Business Inspirations"), in which companies, universities and associations participate.

It provides an opportunity to network, to exchange experiences.

In addition, there are presentations of dynamically developing companies from the West Pomeranian (Zachodniopomorskie) Voivodeship, as well as presentations of activities of Szczecin universities that may be attractive to entrepreneurs.

Integrating business and science strengthens the relationship, and gives students the opportunity to fit in with the organizations presented.

All these activities positively affect the region's investment attractiveness and build its position.



PART 6

Employment potential

EMPLOYMENT POTENTIAL

Average rating

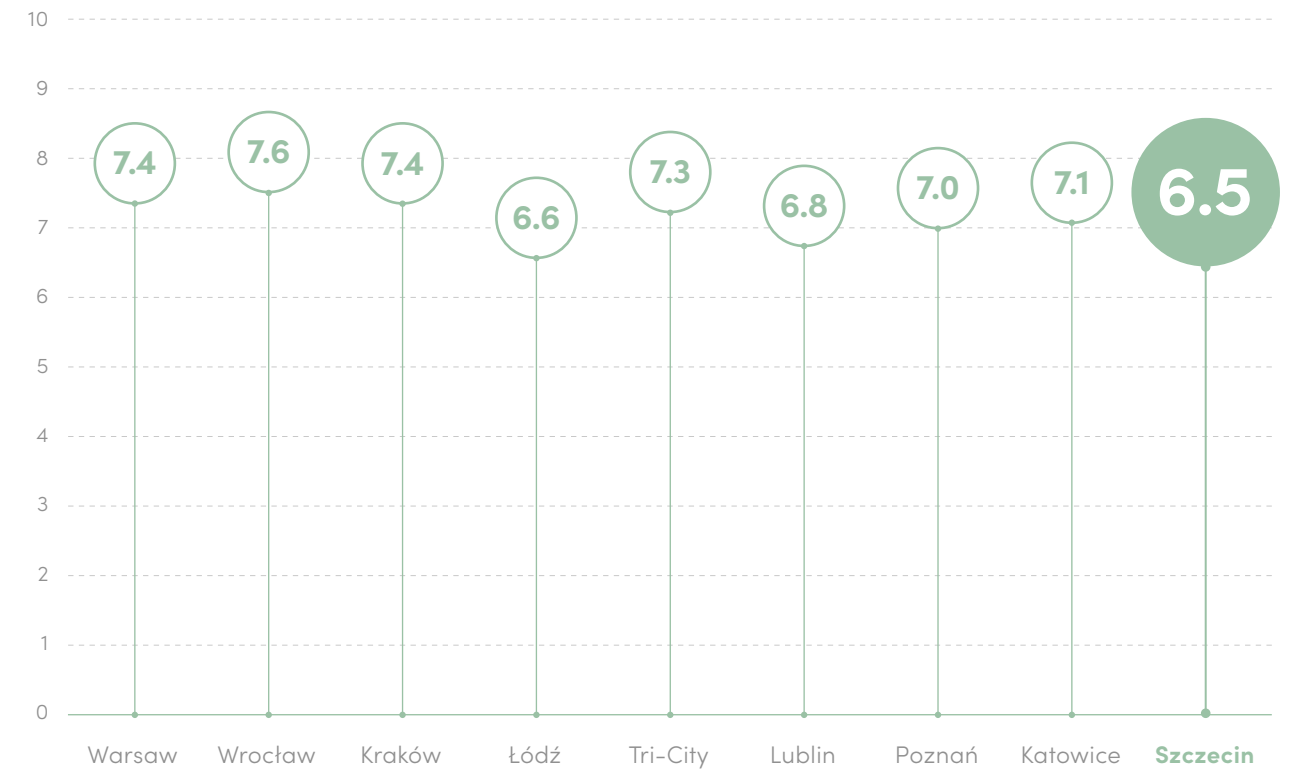
6.5

6.01.

Employment potential

CHART 6.1.

Average employment potential rating for Szczecin

LABOUR MARKET INDICATORS
OF THE WEST POMERANIAN VOIVODESHIP

1,640,622

Population

6.7%

Unemployment rate

192,751

Average employment
in the enterprise sector

6,570.38 PLN

Average gross monthly salary
in the enterprise sectorFind out more at www.investmentpotential.pl

6.02.

Sample salaries in Szczecin

GROSS MONTHLY SALARIES (PLN)

Manufacturing and Logistics Sector	min.	max.
Production worker (unskilled)	4,300	5,500
Production worker (skilled)	5,000	8,000
Shift Manager	6,000	9,000
Logistics specialist	5,000	8,500
Logistics manager	8,500	12,000
Production engineer	7,000	9,000
SSC/BPO Sector	min.	max.
GL Accountant (2-3 years of experience)	6,000	7,500
GL Senior Accountant (over,3 years of experience)	7,500	9,000
GL Team Leader (team of,5-15 people)	9,500	13,000
AP/AR Accountant (2-3 years of experience)	5,500	7,000
AP/AR Senior Accountant (over,3 years of experience)	7,000	8,000
AP/AR Team Leader (team of,5-15 people)	9,000	12,000
CS Junior Specialist (no experience)	4,000	5,000
CS Specialist (over 1 year of experience)	5,000	7,000
CS Team Leader (team of,5-15 people)	8,000	11,000
Payroll Specialist (1-3 years of experience)	5,500	7,500
Senior Payroll Specialist (over,3 years of experience)	7,500	9,000
Payroll Team Leader (team of,5-15 people)	9,500	14,000
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

Find optimal salary zone!

AND SAY NO TO SALARY PRESSURE



According to research, on average an employee who is changing jobs expects a 22% pay rise. Check the salaries which your company offers against those of the competition and find a safe zone which will prevent staff turnover. We will be more than happy to provide you with details on the full range of Market Research services.

“

With the growth of companies, there are more and more positions on the market where graduates of numerous universities in Szczecin can find employment.

MATEUSZ OTKAŁA

EMPLOYMENT POTENTIAL

Expert commentary

Mateusz Otkala

BUSINESS DEVELOPMENT MANAGER, ANTAL ENGINEERING & OPERATIONS

The city's geographic location is of considerable importance for the labour market. Undoubtedly, it provides great opportunities for the local community, but it also forces competition for the same employee between Polish and German employers.

According to the BEAS report, the dominant economic sectors in the West Pomeranian region are manufacturing (constantly developing economic zones), trade (proximity to the border is of decisive importance here) and transportation (an ideal base for carriers).

A huge driver of the labour market is always new investments, and these are steadily increasing in Szczecin and the surrounding area.

With the growth of companies, there are more and more positions on the market where graduates of numerous universities in Szczecin can find employment.

As many as 70 percent of the companies surveyed plan to increase employment, indicating strong dynamics in the labour market.

With relatively low unemployment in the West Pomeranian region (about 7 percent, Poland – 5 percent), one of the main goals should be to encourage young people to come to study technology in Szczecin and to tie their careers to this region.

Currently, Szczecin ranks as economically attractive to potential investors in terms of wages – the average gross monthly salary in 2022 was PLN 6,169.94, which was 92% of the average salary in the country.

Clearly, over time, one can see the tremendous work that has been done by city officials to increase the attractiveness of the region and create new jobs. Infrastructure development reduces the distance between other regions, extensive green areas increase the comfort of residents, and investment in culture increases the recognition of the region.



PART 7

Business potential

BUSINESS POTENTIAL

Average rating

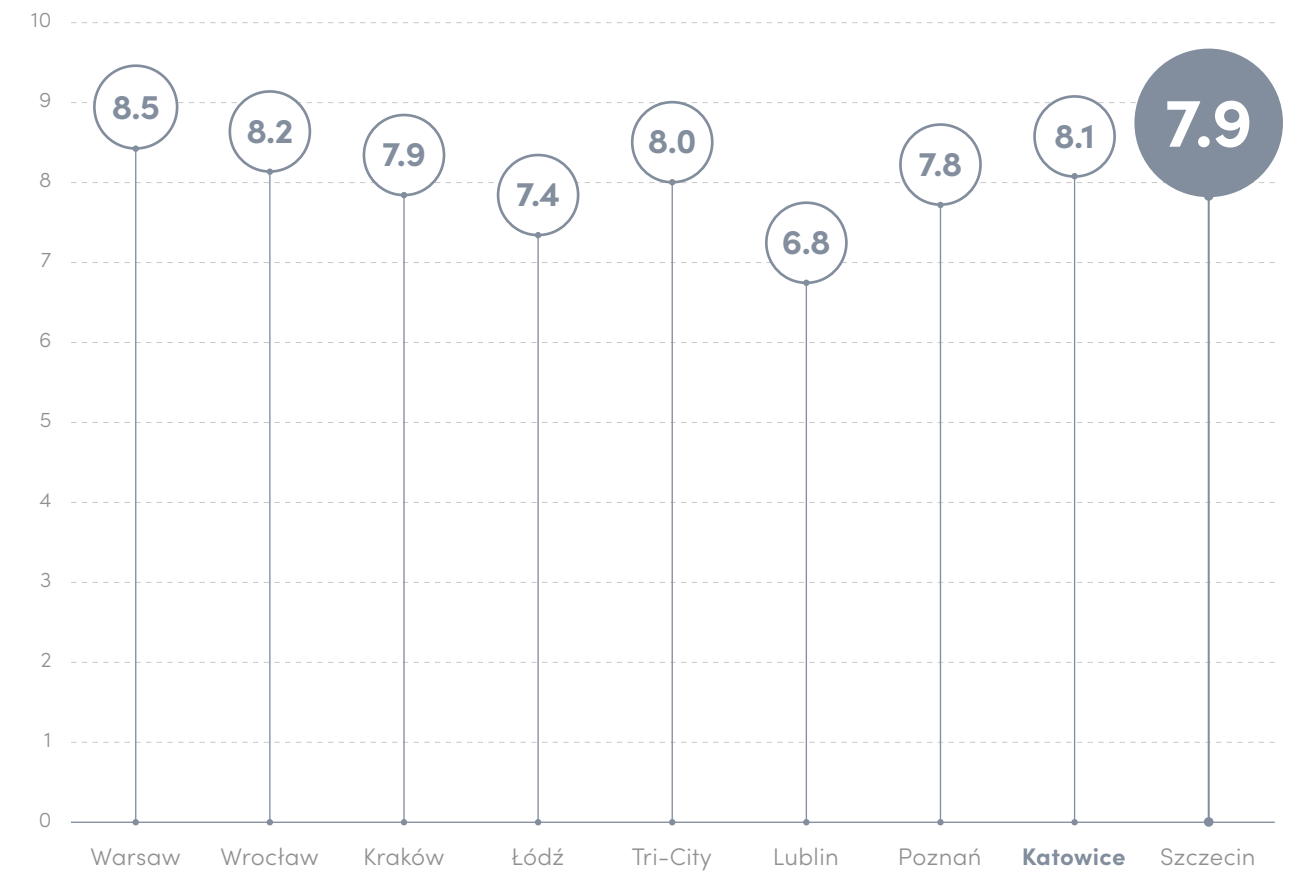
7.9

7.01.

Business potential

CHART 7.1.

Average business potential rating for Szczecin



Szczecin is attracting increasing interest as an attractive place for business and investment, thanks in part to its favourable location and developed network of connections.

One of the key factors attracting investors is access to a skilled labour force.

The city is open to innovation and developing sectors of the future.

Investments are being made in scientific and research centres, IT infrastructure and innovative solutions.

All these factors encourage investment in sectors such as automotive, ICT, business services and logistics.

Find out more at www.investmentpotential.pl



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We recognized the potential of this city back in 2015, investing here in Accolade's first industrial park in Poland.

JAROSŁAW WNUK

BUSINESS POTENTIAL

Expert commentary

Jarosław Wnuk

MANAGING DIRECTOR OF ACCOLADE IN POLAND

Szczecin, due to its strategic location, extensive infrastructure, proximity to seaports and rich human resources, provides favourable investment conditions.

We recognized the potential of this city back in 2015, investing here in Accolade's first industrial park in Poland. Since then, we have grown with the region, attracting global brands including Tyco Electronics, Pierce and Rohlig Suus.

Companies such as Zalando and Amazon have opened branches in the region.

Here we also have the largest warehouse in the Polish portfolio. The scale and importance of these investments prompted us to open our first regional office, which facilitates cooperation with tenants, the local community, authorities and businesses.

Today, environmentally friendly projects are a priority for investors.

Wind farms have gained prominence in Szczecin, making a significant contribution to the development of renewable energy.

The city's sustainable development policy also includes the first BREEAM certificate in Poland at the highest Outstanding level, which Accolade obtained for its warehouse located at Kniewska street.

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7.02.

Selected companies in and around the city

SSC/BPO	AVANGARDO MARCIN OSAK	SYSTEM-IT SP. Z O.O. SP. K.
AGENCJA 3SHAPE POLAND SP. Z O.O.	BYSS MOBILE	TEONITE
AUTO1	CLOUDEAMONS	THEAVY CORP
COGNIZANT	COGNITRAN SP. Z O.O.	TIDIO
COLOPLAST BUSINESS CENTEE	DMZ-CHEMAK SP. Z O.O.	WEBEELINE
CONCENTRIX CVG INTERNATIONAL SP. Z O.O.	DO IT GLOBAL LTD	XCOMP SPÓŁKA Z OGRANICZONĄ ODPOWIEDZIALNOŚCIĄ SP. K.
CSP CUSTOMER SERVICES POLSKA SP. Z O.O.	EKSPERT SYSTEMY INFORMATYCZNE	
DEMANT	HEUTHES SP. Z O.O.	Industrial production
DFZ	HOME.PL	„ARBET” SP. Z O.O. ZAKŁAD PRODUKCYJNO-USŁUGOWY
DIEBOLD NIXDORF SP. Z O.O.	HUUUUGE	„JAMADO” PRZEDSIĘBIORSTWO PRODUKCYJNO – HANDLOWE
GLOBALLOGIC POLAND SP. Z O.O.	IAI SPÓŁKA Z OGRANICZONĄ ODPOWIEDZIALNOŚCIĄ	ABENA POLSKA SP. Z O.O.
GRYFTEC EMBEDDED SYSTEMS SP. Z O.O.	IAMIP TECHNOLOGY SP. Z O.O.	BBP SP. Z O.O.
IT-BS	INPROJECTS	FARAONE POLAND SP. Z O.O.
KONGSBERG MARITIME POLAND	MIKROSERWIS S.C.	MURGRABIA
LASTMINUTE.COM GROUP	MYODOO	SANGER MET SP. Z O.O.
MAJOREL POLSKA SP. Z O.O.	NETCOM BUILDING TECHNOLOGIES SP. Z O.O.	SIGMA LIFT SP. Z O.O.
METRO GLOBAL SOLUTION CENTER	NTT BONUM	TOTAL- PACK
SALLING GROUP	PRIMACO SP. Z O.O.	
SII SP. Z O.O.	PROFI-DATA	Food industry
TRACERROUTE42 SP. Z O.O.	RAVEN IT	NESTLE POLSKA SA
UNICREDIT SERVICES S.C.P.A.	SB SOFTWARE SP. Z O.O.	COFFEE ROASTERS POLAND SP. Z O.O. SP. K.
VESTAS	SHOPER S.A.	
WILHELMSSEN BUSINESS SERVICE CENTER SP. Z O.O.	SOFTVIG SYSTEMY INFORMATYCZNE SP. Z O.O.	Pharmacy
	SPYROSOFT SYNERGY SA	CEFARM SZCZECIN SA
	SQUIZ POLAND SP. Z O.O.	SANPROBI SP. Z O.O.
	STETTINER / 180HB	SANUM POLSKA SP. Z O.O.
	STORAGE IT SP. Z O.O.	
IT & Telecommunications		Real estate
4 IT SECURITY SP. Z O.O.		ACCOLADE
ACNIELSEN POLSKA SP. Z O.O.		
AGENCJA SO FINE		



PART 8

Assessing the location as a place to live

ASSESSING THE LOCATION AS A PLACE TO LIVE

Average rating

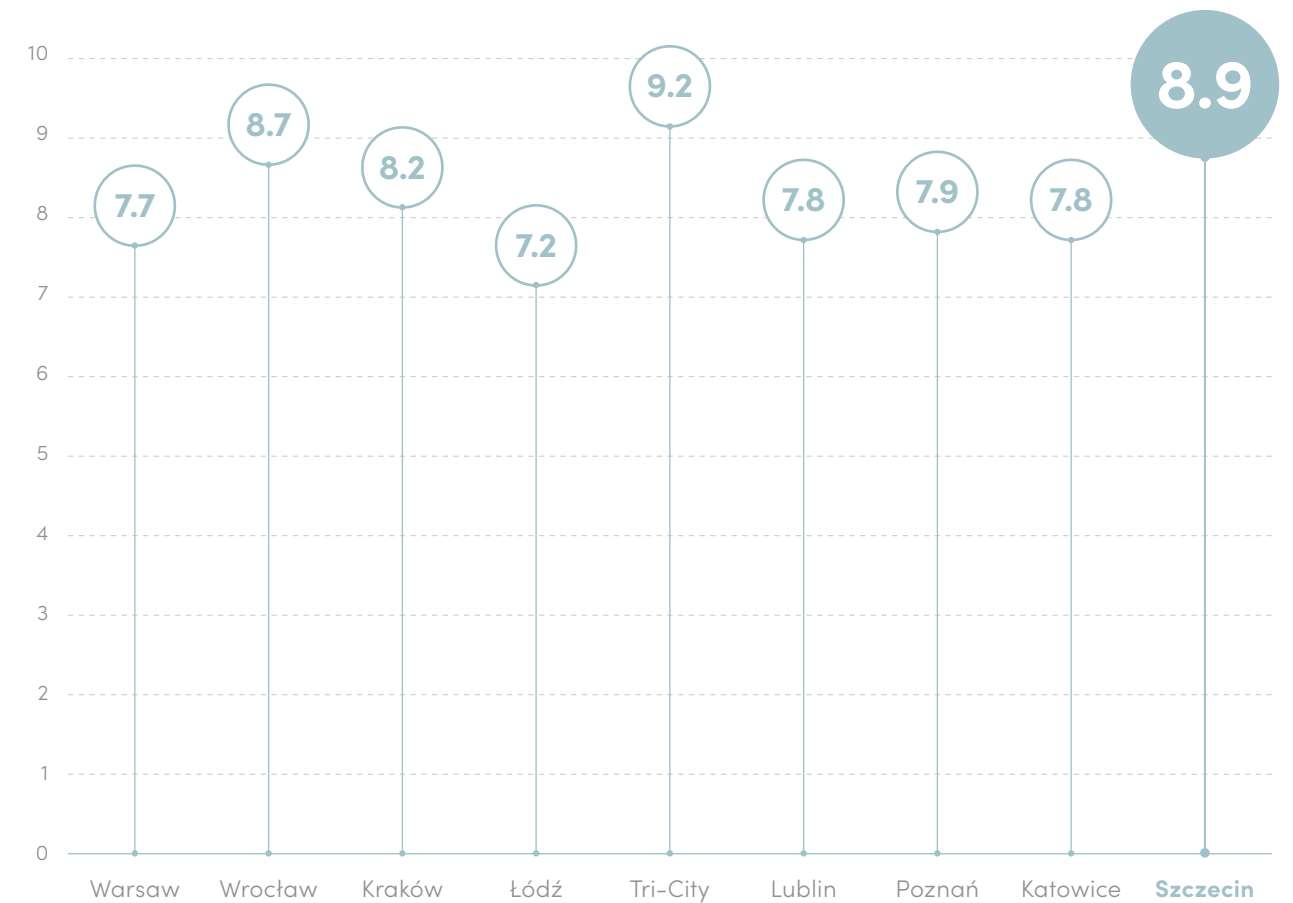
8.9

8.01.

Assessing the location as a place to live

CHART 8.1.

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



The assessment of Szczecin as a place to live is very good. The city has a rich cultural offer and a resident-friendly urban space.

Szczecin, sometimes referred to as a green city, has a total of more than 500 hectares of urban green space and is surrounded by water.

In terms of cultural life, the city boasts three theatres, an opera house and a new philharmonic hall that wins awards not only for its concerts, but also for its architecture.

Szczecin also has well-organized public transportation – in addition to trams and buses, residents also have city bicycles at their disposal, making it easy to get around the city and enjoy an active lifestyle.

Find out more at www.investmentpotential.pl

8.02.

Szczecin as a place to live

DATA ON TOURISM AND CULTURAL DEVELOPMENT
OF THE CITY

TOP 10
MEDIUM EUROPEAN CITIES
– BUSINESS FRIENDLY

In the “fDi” ranking of *European Cities and Regions of the Future 2023* Szczecin was ranked in the Top 10 Medium European Cities – Business Friendly.

500 HECTARES

500 hectares of urban green space, as much as 25% of Szczecin is water.

3 RD PLACE

Szczecin took third place in the nationwide *Water City Index 2022* report, which is also a ranking of water resource efficiency in Polish cities.

SZCZECIN 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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