

Prepared
in cooperation with **POZnań***



POZNAŃ

City attractiveness and office market

H1 2021

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FACTS & FIGURES



CITY AREA

261.9 sq km



POPULATION

532,000



POPULATION FORECAST

503,800 (2030)



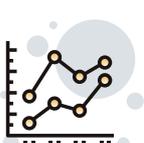
UNEMPLOYMENT RATE

2.2%



GDP GROWTH

4%
(2018)



GDP PER CAPITA

PLN 108,264
(2018)



AVERAGE SALARY

PLN 6,694
(gross)

INVESTMENT ATTRACTIVENESS

1. RANKINGS INDICATING THE INVESTMENT ATTRACTIVENESS OF THE CITY

3.

3rd place in the **ABSL ranking of locations in terms of doing business** (2021).

2.

2nd place in **Emerging Europe Business Friendly City Perception Index 2021**.

1.

1st place in **Financial Ranking of local government** by Foundation Institute for Eastern Studies.

The most dynamically developing city in Poland, according to **CEE Business Services Summit&Awards 2021**.

2. INVESTMENT INCENTIVES

FINANCIAL SUPPORT

- Scholarship programme aimed at students preparing to start their career in Poznań;
- Employer branding.

NON-FINANCIAL SUPPORT

- Project Manager – a person assigned to the project, offering support during preparation, implementation and execution of investment;
- Investment preparation;
- Preparation for investment launch;
- Support in recruiting process;
- Cooperation with the investor after launching the project.

QUALITY OF LIFE

3. RANKINGS ON THE QUALITY OF LIFE IN THE CITY

4.

4th place in Sustainable Development Ranking.

7.

7th place in TOP10 best European cities for remote work ranking by OVO Network.

3.

3rd place in Ranking of Local Governments Most Dynamically Developing Entrepreneurship.

8.

fDI European cities and regions of the future 2020/21: 8th place in „fDi Strategy” category, among medium-sized cities.

9.

9th place in „Business friendliness”, among medium-sized cities.

Award in „Municipality for 5!” and the title of „Golden Municipality for 5!”.

„Pearls of Local Government” 2020 for two projects launched in 2020: positive technologies conference and EU project „Let’s play in Wielkopolska”.

4. CITY INITIATIVES AIMED AT IMPROVING THE QUALITY OF LIFE IN THE CITY

Attracting new inhabitants

Our response to the demographic challenge and migration trends is to retain inhabitants and attract new ones through the consistent implementation of the open city strategy and taking actions to improve the quality of life by: developing infrastructure, city centre renovation, housing, improving natural environment, improving city’s easthetics, promoting cultural events.

Creating attractive jobs

Poznań is an example of a city where the most advanced processes are performed in modern services centres. Companies like GSK, McKinsey or Franklin Templeton are constantly developing and increasing employment rates.

Poznań provides human capital for innovative companies in modern services sector by ensuring quality of education at all levels.

Mobility – ecological solutions for transport

Car-sharing, scooter-sharing.

Projekt Centrum (Project Centre)

Infrastructure modernisation, car traffic limiting and other activities undertaken in the city centre in order to „give it back” to the inhabitants.

Openness – promoting diversity, tolerance and respect:

36,6 campaign – the slogan of the campaign: „Tolerance towards people is not enough, they deserve respect”. The key is openness to foreigners, including migrants from Ukraine.

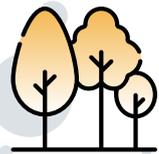
Smart City

Strengthening the innovative character of the economy and implementing new technology, development of the creative entrepreneurship and start-up sector, putting emphasis on education at all levels and active support for universities.



BIKE PATHS

275.59 km (2019)



GREEN AREAS

128.3 sq km

FACTS & FIGURES

NUMBER OF STUDENTS



102,164

NUMBER OF GRADUATES



25,100

NUMBER OF UNIVERSITIES



24

AIRPORT – DISTANCE TO THE CITY CENTRE



7 km

AIRPORT – NUMBER OF PASSENGERS



657,709 (2020)
2,379,635 (2019)

BSS SECTOR – NUMBER OF CENTRES



120

BSS SECTOR – NUMBER OF EMPLOYED



21,500

RATING

A- (STABLE OUTLOOK)

RATING AGENCY

Fitch

POZNAŃ

H1 2021



EXISTING STOCK

618,000 sq m



SUPPLY UNDER CONSTRUCTION

76,000 sq m



VACANCY RATE

12.9%



NEW SUPPLY

35,800 sq m



TAKE-UP

19,600 sq m

Total office stock in Poznań at the end of June 2021 exceeded 618,000 sq m. In H1 2021 only one new project was completed, although developers did start new investments. In Q2 2021, the next phase of the Nowy Rynek complex was completed, adding approx. 36,000 sq m to the local stock. At the end of June 2021 approximately 75,000 sq m, in four

projects, was identified as being under construction, of which the two largest: Nowy Rynek E and Andersia Silver are scheduled for completion in 2023. Tenants remain relatively active in the local market – during H1 2021 almost 20,000 sq m was subject to lease, which is 10% higher than H1 2020. At the end of June 2021 the vacancy rate stood at 12.9%, which is 0.4 pp. higher

than the previous quarter and 1.6 pp. lower compared to the corresponding period of 2020. The y-o-y decrease in vacancy rate occurred due to limited new supply.

SELECTED SCHEMES UNDER CONSTRUCTION

ANDERSIA SILVER

- 40,000 sq m
- Q4 2023
- Von der Heyden Group

NOWY RYNEK E

- 26,000 sq m
- Q3 2023
- Skanska Property Poland

Total office space Completion date Developer / Owner

SELECTED BPO, SSC/GBS, IT AND R&D CENTERS:

ROCKWOOL | Arvato Polska | Capgemini | Carlsberg Shared Services | Franklin Templeton | Miele | B.Braun | Sii | Veolia Centrum Usług Wspólnych | Volkswagen Group Services |

STANDARD LEASE TERMS IN LARGE SCALE, NEW BUILDINGS



SERVICE CHARGE PLN/SQM/MONTH

15-18



RENT-FREE MONTHS

5-8



FIT-OUT BUDGET EUR/SQM

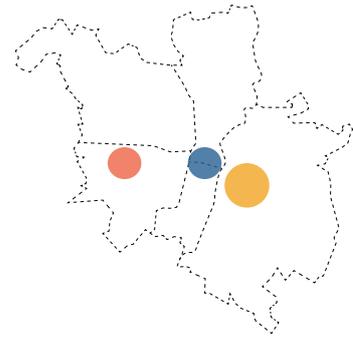
250-500

COWORKING OPERATORS IN POZNAŃ:

Business Link
Regus

MAJOR OFFICE CONCENTRATION AREAS

	EXISTING STOCK	SUPPLY UNDER CONSTRUCTION	VACANCY RATE	MONTHLY ASKING RENT
CITY CENTRE	269,700 sq m	72,000 sq m	10.3%	EUR 10-17 /sq m
MALTA	43,000 sq m	0 sq m	3.6%	EUR 14-15 /sq m
MARCELIŃSKA/BUŁGARSKA	144,000 sq m	0 sq m	19.2%	EUR 10-14 /sq m



MAJOR REGIONAL CITIES

KRAKÓW, WROCŁAW, TRICITY, POZNAŃ, KATOWICE, ŁÓDŹ

H1 2021



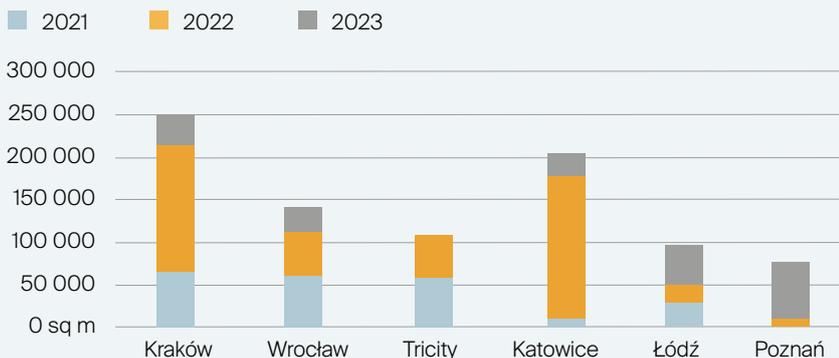
POZNAŃ COMPARED TO MAJOR REGIONAL CITIES

Poznań, as one of the smaller-scale office markets, ranks fourth in terms of the size among regional markets in Poland. After a large increase in new supply in 2019, the space available in Poznań is systematically leased. In H1 2021, 36,000 sq m was completed. Further projects will be finished in 2023 - the prestigious projects planned for completion will strengthen Poznań's position among the regional office markets.

NEW SUPPLY (H1 2021) AND VACANCY RATE (Q2 2021)



SUPPLY UNDER CONSTRUCTION BY COMPLETION YEAR (Q2 2021)



ASKING RENTS (Q2 2021)



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 Invest in Poznań
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Poznań is one of the most attractive cities for investors in the Central and Eastern European region, repeatedly awarded in prestigious business rankings. The city is developing in a sustainable manner, in line with the smart city idea. In Poznań we create good conditions for investment, but also for living for all residents. We focus on openness and diversity, we care for green areas, a rich cultural and modern public transport. Investors, among others, from the modern services sector and the IT industry choose Poznań due to the availability of qualified workforce - global giants, including: Franklin Templeton, GSK. Miele, Capgemini or Bridgestone SSC are completing in Poznań the most advanced processes.