

Polish Cities of the Future 2017/18



WARSAW HAS RETAINED THE TITLE OF **fDi**'S POLISH CITY OF THE FUTURE FOR 2017/18, WITH KRAKOW REMAINING IN SECOND PLACE AND WROCLAW RISING TO THIRD. **CATHY MULLAN** REPORTS

Nowhere in Poland matches the level of FDI received by its capital city, Warsaw, which has – for the second time running – been named **fDi**'s Polish City of the Future. Warsaw attracted 392 FDI projects between 2006 and 2015, according to greenfield investment monitor **fDi** Markets, which represented nearly one-fifth of Poland's total inbound FDI.

Business and financial services were the primary FDI sectors, accounting for nearly one-third of total inbound FDI. The city boasts the country's highest GDP and GDP per capita figures, which have helped contribute to its first place ranking in the economic potential category.

Warsaw's workforce

US-based MoneyGram, a money transfer and payment services company, attributed its decision to establish its global business centre in Warsaw to the city's welcoming business climate. Moreover, 10% of all investors' motives recorded by **fDi** stated that their investment decision was influenced by the skilled workforce on offer in the city.

Warsaw has the highest number of further education institutions of all cities in Poland, and the University of Warsaw appears in sixth place on the QS Ranking for Top 100 Universities in emerging Europe and central Asia. The city trains the highest number of language students, with nearly 300,000 students studying in 2015. Belgium-based medical devices company Genae established an office in the city, drawn by, among other things, the foreign language skills of the workforce.



Leading player: Warsaw ranked first overall, and in Economic Potential

With the shockwaves of the UK's Brexit vote in June still being felt around Europe, Warsaw is competing with financial heavy-hitters such as Frankfurt and Paris to grab the spoils. According to Bloomberg, the Polish government is in talks with 30 companies regarding their potential relocation from the UK in the wake of its departure from the EU. While big banking operations may look to Germany and France, cities in eastern Europe, such as those in Poland, are keen to benefit from back-office and other support investment opportunities. The Polish government estimates that up to 30,000 jobs could be created in

the country's business service sector as a result of the move.

Krakow's tech strength

Krakow, in Poland's south, took second place in the overall ranking, attracting 138 FDI projects in the 10 years to 2015. More than one-fifth of FDI in the city was in the software and IT sector, supporting the city's reputation as a technology hub. US-based software house SolarWinds established an R&D facility in Krakow, creating 40 jobs. The city's environment for research and its reputation as a technology hub were major draws for the company. Krakow Technology Park provides a dedicated

TOP 10 CITIES – OVERALL

RANK	CITY	REGION
1	Warsaw	Masovia
2	Krakow	Lesser Poland
3	Wroclaw	Lower Silesia
4	Poznan	Greater Poland
5	Gdansk	Pomerania
6	Lodz	Lodz
7	Grodzisk Mazowiecki	Masovia
8	Katowice	Silesia
9	Blonie	Masovia
10	Gdynia	Pomerania

TOP 5 LARGE CITIES – OVERALL

RANK	CITY	REGION
1	Warsaw	Masovia
2	Krakow	Lesser Poland
3	Wroclaw	Lower Silesia
4	Poznan	Greater Poland
5	Gdansk	Pomerania

TOP 5 MID-SIZED CITIES – OVERALL

RANK	CITY	REGION
1	Gdynia	Pomerania
2	Rzeszow	Subcarpathia
3	Legnica	Lower Silesia
4	Chorzow	Silesia
5	Tychy	Silesia

TOP 5 SMALL CITIES – OVERALL

RANK	CITY	REGION
1	Grodzisk Mazowiecki	Lesser Poland
2	Blonie	Masovia
3	Niepolomice	Lesser Poland
4	Strykow	Lodz
5	Kobierzyce	Lower Silesia

“People choose Gdynia as their place to live because they can find here advantages that other cities fail to have”

Katarzyna Gruszecka-Spychala, deputy mayor, Gdynia

facility for technology-focused companies, with a technology incubator, office space and multilab facilities for start-ups and new companies. The park is incorporated into a special economic zone, offering tax incentives, benefits and public aid for investing companies.

“We are very happy that our determined work in support of the development of our town is bearing fruit”

Krzysztof Chojniak, mayor, Piotrkow Trybunalski

TOP 10 CITIES – ECONOMIC POTENTIAL

RANK	CITY	REGION
1	Warsaw	Masovia
2	Wroclaw	Lower Silesia
3	Krakow	Lesser Poland
4	Poznan	Greater Poland
5	Gdansk	Pomerania
6	Lodz	Lodz
7	Grodzisk Mazowiecki	Masovia
8	Katowice	Silesia
9	Blonie	Masovia
10	Gdynia	Pomerania

TOP 5 LARGE CITIES – ECONOMIC POTENTIAL

RANK	CITY	REGION
1	Warsaw	Masovia
2	Wroclaw	Lower Silesia
3	Krakow	Lesser Poland
4	Poznan	Greater Poland
5	Gdansk	Pomerania

TOP 5 MID-SIZED CITIES – ECONOMIC POTENTIAL

RANK	CITY	REGION
1	Gdynia	Pomerania
2	Tychy	Silesia
3	Legnica	Lower Silesia
4	Gliwice	Silesia
5	Chorzow	Silesia

TOP 5 SMALL CITIES – ECONOMIC POTENTIAL

RANK	CITY	REGION
1	Grodzisk Mazowiecki	Lesser Poland
2	Blonie	Masovia
3	Niepolomice	Lesser Poland
4	Strykow	Lodz
5	Kobierzyce	Lower Silesia

Wroclaw, in Poland’s Lower Silesian voivodship, rose from fourth to third place in this year’s ranking. The city welcomed 20 FDI projects in 2015, its highest level since 2012, lifting it to second place in the economic potential category. Additionally, Wroclaw had the highest rate of rein-

TOP 10 CITIES – HUMAN CAPITAL AND LIFESTYLE

RANK	CITY	REGION
1	Warsaw	Masovia
2	Krakow	Lesser Poland
3	Wroclaw	Lower Silesia
4	Poznan	Greater Poland
5	Lublin	Lublin
6	Gdansk	Pomerania
7	Bialystok	Podlaskie
8	Tarnow	Lesser Poland
9	Bydgoszcz	Kuyavian-Pom.
10	Lodz	Lodz

TOP 5 LARGE CITIES – HUMAN CAPITAL AND LIFESTYLE

RANK	CITY	REGION
1	Warsaw	Masovia
2	Krakow	Lesser Poland
3	Wroclaw	Lower Silesian
4	Poznan	Greater Poland
5	Lublin	Lublin

TOP 5 MID-SIZED CITIES – HUMAN CAPITAL AND LIFESTYLE

RANK	CITY	REGION
1	Tarnow	Lesser Poland
2	Rzeszow	Subcarpathia
3	Chorzow	Silesia
4	Gdynia	Pomerania
5	Torun	Kuyavian-Pom.

TOP 5 SMALL CITIES – HUMAN CAPITAL AND LIFESTYLE

RANK	CITY	REGION
1	Swidnica	Lower Silesia
2	Mielec	Subcarpathia
3	Olawa	Lower Silesia
4	Kobierzyce	Lower Silesia
5	Grodzisk Mazowiecki	Masovia

“City growth, as we view it, is a long-distance run which requires constant, strenuous effort”

Grzegorz Benedykciński, mayor, Grodzisk Mazowiecki

vestment of all Polish cities analysed. Switzerland-based Nestlé expanded its operations in the city at the end of 2015, investing \$44m in its Purina PetCare facility. Other manufacturing expansions have included Mondelez International subsidiary Cadbury, and US-based conglomerate 3M. ■

REGIONS

POLISH CITIES OF THE FUTURE

TOP 10 CITIES – COST EFFECTIVENESS

RANK	CITY	REGION
1	Radomsko	Lodz
2	Piotrkow Trybunalski	Lodz
3	Srem	Greater Poland
4	Mielec	Subcarpathia
5	Nowa Sol	Lubusz
6	Kutno	Lodz
7	Gorzow Wielkopolski	Lubusz
8	Tarnow	Lesser Poland
9	Strykow	Lodz
10	Slubice	Lubusz

TOP 5 LARGE CITIES – COST EFFECTIVENESS

RANK	CITY	REGION
1	Bialystok	Podlaskie
2	Lodz	Lodz
3	Bydgoszcz	Kuyavian-Pom.
4	Szczecin	West Pomerania
5	Krakow	Lesser Poland

TOP 5 MID-SIZED CITIES – COST EFFECTIVENESS

RANK	CITY	REGION
1	Gorzow Wielkopolski	Lubusz
2	Tarnow	Lesser Poland
3	Czestochowa	Silesia
4	Legnica	Lower Silesia
5	Sosnowiec	Silesian

TOP 5 SMALL CITIES – COST EFFECTIVENESS

RANK	CITY	REGION
1	Radomsko	Lodz
2	Piotrkow Trybunalski	Lodz
3	Srem	Greater Poland
4	Mielec	Subcarpathia
5	Nowa Sol	Lubusz

“Szczecin provides optimum living standards and can be recommended to investors striving for success”

Piotr Krzystek, mayor, Szczecin

“Our commitment to continuously improving the quality of life makes Katowice, without a doubt, a perfect place to invest in”

Marcin Krupa, mayor, Katowice

TOP 10 CITIES – CONNECTIVITY

RANK	CITY	REGION
1	Warsaw	Masovia
2	Grodzisk Mazowiecki	Masovia
3	Blonie	Masovia
4	Chorzow	Silesian
5	Krakow	Lesser Poland
6	Gdansk	Pomerania
7	Dabrowa Gornicza	Silesia
8	Tarnow	Lesser Poland
9	Wroclaw	Lower Silesia
10	Gdynia	Pomerania

TOP 5 LARGE CITIES – CONNECTIVITY

RANK	CITY	REGION
1	Warsaw	Masovia
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TOP 5 MID-SIZED CITIES – CONNECTIVITY

RANK	CITY	REGION
1	Chorzow	Silesia
2	Dabrowa Gornicza	Silesia
3	Tarnow	Lesser Poland
4	Gdynia	Pomerania
5	Sosnowiec	Silesia

TOP 5 SMALL CITIES – CONNECTIVITY

RANK	CITY	REGION
1	Grodzisk Mazowiecki	Masovian
2	Blonie	Masovian
3	Myslowice	Silesian
4	Niepolomice	Lesser Poland
5	Mielec	Subcarpathian



Katowice (pictured) scores well across a number of categories, ranking second in Poland for FDI Strategy



TRADITION MEETS MODERNITY IN KRAKÓW

Kraków has built on its cultural heritage to become a European powerhouse in technology, outsourcing and business services

Kraków has much to boast about: it is a UNESCO City of Literature and its Old Town is a World Heritage Site.

The city enjoys good links with the rest of the world via its international airport, which handled 4.98 million passengers in 2016, and will receive international flights to Chicago in July 2017. The city's popularity, which saw it welcome more than 12 million visitors in 2016, is further enhanced by its numerous cultural and sporting events, including hosting the 2016 Men's European Handball Championship as well as annual events such as the Conrad Festival, the Cracovia Marathon, the Miłosz Festival, the Misteria Paschalia Festival, the Jewish Culture Festival and cycling's Tour de Pologne.

But being a world-famous centre of culture and heritage doesn't mean you have to live in the past, as Kraków demonstrates.

NOT JUST A PRETTY FACE

While history and tourism are important to Kraków, this hasn't stopped it from building a reputation as a dynamic, ambitious location for companies involved in sectors such as management and business processes, architecture, construction and tech innovation. In fact, its business and technology sectors have recorded consistent double-digit year-on-year growth and promise more to come.

Kraków is rated the best location for mod-

"KRAKÓW'S BUSINESS AND TECHNOLOGY SECTORS HAVE RECORDED CONSISTENT DOUBLE-DIGIT YEAR-ON-YEAR GROWTH AND PROMISE MORE TO COME"

ern services in Europe in Tholons Top 100 Outsourcing Destinations 2016, coming ninth among the top 100 destinations for outsourcing worldwide. It featured in the Top 10 Large European Cities for Business Friendliness in the Financial Times **fDi** European Cities and Regions of the Future 2016/2017 ranking, and was rated the best venue for developing BPO projects in UNCTAD's 2011 World Investment Report.

REACHING FOR THE STARS

The roll call of companies located in the city includes ABB, Accenture, Akamai, Alexander Mann Solutions, Amer Sports, Amway, Anachron, Antenna, Aon, Asseco, BNP Paribas, Brown Brothers Harriman, Capgemini, Capita Group, CH2M, Cisco, Comarch, Delphi, Deutsche Telekom, EDF, Electrolux, Euroclear, EY, FMC Technologies, Genpact, HCL Technologies, Hays, Heineken, Herbalife, Hitachi, HSBC, IBM, IBM ITO, IBM Software Lab,

Indesit, International Paper, Lufthansa, Lundbeck, Luxoft, Mota-Engil, Mitsubishi, Motorola, Nokia, Oracle, PerkinElmer, Philip Morris International, Rolls-Royce, RR Donnelley, RWE, Sabre Holdings, Samsung, Serco, Shell, Skanska, State Street Corporation, Tesco, UBS, RWE and Zurich Insurance.

KRAKÓW'S ART OF DEVELOPMENT

Kraków's development vision is focused on creating attractive, modern, friendly and green places for living and relaxation. The city has begun a number of large projects, including Nowa Huta of the Future (a 5,500-hectare sustainable development scheme), Kraków New City and Kraków Airport. Units like the municipal Investor Support Centre, the Special Economic Zone and Krakow Technology Park help business to grow.

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REGIONS

POLISH CITIES OF THE FUTURE

TOP 10 CITIES – BUSINESS FRIENDLINESS

RANK	CITY	REGION
1	Warsaw	Masovia
2	Wroclaw	Lower Silesia
3	Poznan	Greater Poland
4	Krakow	Lesser Poland
5	Gdansk	Pomerania
6	Lodz	Lodz
7	Grodzisk Mazowiecki	Masovia
8	Szczecin	West Pomerania
9	Gdynia	Pomerania
10	Katowice	Silesia

TOP 5 LARGE CITIES – BUSINESS FRIENDLINESS

RANK	CITY	REGION
1	Warsaw	Masovia
2	Wroclaw	Lower Silesia
3	Poznan	Greater Poland
4	Krakow	Lesser Poland
5	Gdansk	Pomerania

TOP 5 MID-SIZED CITIES – BUSINESS FRIENDLINESS

RANK	CITY	REGION
1	Gdynia	Pomerania
2	Rzeszow	Subcarpathia
3	Gliwice	Silesia
4	Bielsko-Biala	Silesia
5	Torun	Kuyavian-Pom.

TOP 5 SMALL CITIES – BUSINESS FRIENDLINESS

RANK	CITY	REGION
1	Grodzisk Mazowiecki	Masovia
2	Blonie	Masovia
3	Mielec	Subcarpathia
4	Strykow	Lodz
5	Swidnica	Lower Silesian

“Dabrowa Gornicza is bolstering its reputation as an active, open and creative place to live and grow within”

Zbigniew Podraza,
mayor, Dabrowa Gornicza

METHODOLOGY

To create a shortlist for fDi's Polish Cities of the Future 2017/18, the fDi Intelligence division of the Financial Times collected data using the specialist online tools fDi Markets and fDi Benchmark. The list of 50 locations was drawn up to include the top 50 locations in Poland in terms of inward FDI projects on fDi Markets. Data was then collected for these 50 locations under five categories: Economic Potential, Business Friendliness, Human Capital and Lifestyle, Cost Effectiveness and Connectivity. Locations scored up to a maximum of 10 points for each datapoint, which were weighted by importance to the FDI decision-making process in order to compile both the subcategory rankings as well as the overall Polish Cities of the Future 2017/18 ranking.

In addition, surveys were collected under a sixth category, FDI Strategy. This category is the only qualitative category, and does not feed into the overall result. For this category there were 23 submissions. Locations submitted details about their strategy for promoting FDI, which was then scored by fDi's judging panel. In previous rankings, FDI Strategy had been included in the overall ranking. However, in order to separate totally qualitative and quantitative data, we chose to list FDI Strategy as a standalone ranking.

Cities in the study were categorised according to population. In total, 11 cities were classed in the 'large' category. This included locations with a population greater than 250,000. In addition, 18 cities were classed as 'mid-sized', with a population between 100,000 and 250,000. 'Small' locations (21 locations) had a population below 100,000.

“Krakow's investment capital lies in its comprehensiveness, favourable location, developed infrastructure and human resources”

Jacek Majchrowski,
mayor, Krakow



Supporting player: Krakow took second place in the overall rankings and also in Human Capital and Lifestyle

JUDGING CRITERIA

ECONOMIC POTENTIAL

- Population
- Average annual population growth rate (%)
- Total registered unemployed (per 10,000 people)
- GDP per capita (zloty - current prices)
- GDP (m zloty)
- Inward FDI per 100,000 (2011-2015)
- Outward FDI per 100,000 (2011-2015)
- Balance of migration (per 1000 people)
- Entities unregistered from the region register (per 10,000 people)
- Entities entered in working age (per 1000 people)
- Foreign capital by poviats (per capita)
- Economically active population per 1000 people
- Percentage of the population economically active
- Inward FDI (2011-2015)
- Outward FDI (2011-2015)

HUMAN CAPITAL AND LIFESTYLE

- Total number of cinemas (per 10,000 people)
- Botanical and zoological gardens (per 100,000 people – by voivodship)
- Tourism and recreation clubs
- Tourist accommodation establishments equipped with conference facilities
- Overnight stays of foreign tourists in tourist accommodation establishments
- Beds in general hospitals (per 10,000 people)
- Total number of doctors and dentists (per 10,000 people)
- Life expectancy
- Percentage of children covered by preschool education
- Students following compulsory foreign language instruction (all school types)
- Number of higher education institutions
- Graduates (per 10,000 people)

- Percentage of foreign students studying at Polish universities
- Population density
- Green belts
- Crimes in process with judicial system (per 10,000 people)
- Number of IB schools (per 100,000 people)

COST EFFECTIVENESS

- Price of petrol (zloty per litre)
- Cold water per cubic metre (zloty)
- Education price index
- The price purchase/sale of agricultural land per hectare in private turnover (zloty)
- Average monthly gross wages and salary (zloty)
- Hotel prices (zloty)

CONNECTIVITY

- Percentage of enterprises with broadband access
- Cable television subscribers (per capita)
- Telephone main lines (per 1000 people)
- New buildings completed
- Length of bus lanes (km)
- Roads surfaced (per 100 sq km)
- Passenger traffic (arrivals) in airports
- Number of international destinations served by airports within 80km
- Distance to primary major airport (miles)
- Upload speed (kb/s)
- Download speed (kb/s)

BUSINESS FRIENDLINESS

- Percentage of population with tertiary education (2012)
- Permanent marketplaces
- Retail sales of goods (zloty per capita)
- Balance of commuting journeys (incoming – outgoing)
- Total number of companies in the knowledge-based sector
- Total number of companies in the knowledge-based sector (per 100,000 people)
- Number of jobs created by all inward FDI (2011-2015 including estimates, excluding retail)
- Number of expansion/colocation projects (2011-2015)
- Total number of patents per 100,000 people (2003-2015)

SPOTLIGHT ON GDYNIA ADVERTISEMENT FEATURE



GDYNIA GETS BUSY

Poland's dynamic port city is now an award-winning tech hub

Gdynia's strategic location midway between the northern shores of Western and Eastern Europe has seen it develop in just 90 years into a dynamic city focused on technology and port activities.

Situated on the southern shores of the Baltic Sea, the city is home to Sea City, a 71-hectare former shipyard and harbour currently undergoing regeneration. As the final waterfront area in Europe in a city centre ripe for revitalisation, Sea City will combine residential, service and retail functions with conference and cultural facilities and large open spaces for outdoor activities and sports along with a major marina. It will accommodate more than 10,000 residents and provide several thousand additional jobs in a district that celebrates the existing modernist architecture while also preserving its industrial heritage.

Ranked among the Best Economic Potential Mid-sized Cities by **fDi** Magazine in 2017, the city boasts a well-educated, creative, entrepreneurial and ambitious workforce. Its high living standards make it easy to attract high-quality employees and investors. In fact, according to the 2017 Social Diagnosis of living conditions and quality of life report by Warsaw's University of Finance and Management, 87% of Gdynia's citizens are satisfied with the city. A favourable business and financial environment makes it a good location in which to set up a base. Gdynia is pro-innovation and supports the advanced technologies sector. In fact, innovation is central to its success, with the ICT sector having become a distinguishing feature of the city and the wider region.

Tech firms operating in the area can tap into the Pomeranian Science and Technology Park,

which is the largest in Poland; the Gdynia start-up zone; the Entrepreneurship Incubator; the Pomeranian Special Economic Zone; and the Baltic Port of New Technologies and Constructor's Park. There is also the Interizon ICT cluster, which is supported by regional authorities and is home to more than 150 businesses and scientific partners with links to ICT partners worldwide.

A number of major corporations with a tech focus have set up home in the city. These include Thomson Reuters, where it has its analytical services, software and development centre; Sony Picture Entertainment for IT and financial services; and DNV Poland for training and advisory services for companies.

- WINNER Top 5 Mid-sized Polish Cities of the Future 2017/18 - Overall
- WINNER Top 5 Mid-sized Polish Cities of the Future 2017/18 - Economic Potential
- WINNER Top 5 Mid-sized Polish Cities of the Future 2017/18 - Business Friendliness

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Wroclaw takes FDI Strategy prize

Wroclaw in south-west Poland has topped the FDI Strategy category of this year's **fDi** Polish Cities of the Future 2017/18 ranking, with Katowice holding firm in second place. Most impressively, however, Lublin has climbed 10 places to third.

In an effort to keep investors fully informed of what is happening in the city, Wroclaw Agglomeration Development Agency maintains a dedicated investment promotion website, offering an economic handbook with advice on doing business in the city, as well as publications for foreigners living there. Information is also published for students to encourage them to study and live in Wroclaw, and another website offers information to tourists to attract them to visit the city, which could lead to more investment. Further bolstering the city's digital offering, a mobile app – Invest in Wroclaw Region – helps investors with their site-selection decisions.

Wroclaw is undergoing some major infrastructure developments, including street reconstruction, public transport upgrades (including the development of a park-and-ride system) and the construction of a major sports stadium. A 300-hectare special economic zone is operational in Wroclaw, which offers real estate exemptions for six years, or 15 years for R&D operations, one of the agency's key target sectors. According to the Wroclaw Agglomeration Development Agency, the city has the highest number of R&D entities in Poland, supported by key facilities such as Wroclaw Technology Park and Wroclaw Research Centre, which offers dedicated office and lab space for tech-focused investors. Such figures are a major factor behind the city's aim of becoming a technology hub for central and eastern Europe.

Katowice communication drive

Katowice has remained the judges' choice for second place, thanks in part to its social media and marketing strategy. The city's investor website runs alongside pages dedicated to the promotion of Katowice and another for the Convention Bureau Katowice, which promotes the city as a key destination for meetings, incen-



Top ranking: Wroclaw leads the FDI Strategy ranking

tives, conferences and exhibitions. To that end, key facilities have been established, including the International Congress Centre and the Silesian Museum, offering meeting and conference space. Katowice city centre has also undergone redevelopment, to include 24 hectares of mixed-use development facilities. The investor relations department at city hall remains at the service of investors who locate in the city. An annual marketing campaign is conducted by city hall for companies looking for new employees, while the city's authorities work to foster deeper integration and relations between academia and business.

Lublin, in south-east Poland, come in third for FDI Strategy. Lublin city hall works to develop investment clusters in the city, establishing the Lublin Medicine-Medical and Wellness Cluster and Lublin Cluster of Advanced Aircraft Technology. The city also focuses on attracting investment in the automotive sector, and has more than 10,000 students registered in related courses, providing investors with a reliable workforce. The first hydro-

TOP 15 FDI STRATEGY

RANK	CITY	REGION
1	Wroclaw	Lower Silesia
2	Katowice	Silesia
3	Lublin	Lublin
4	Bydgoszcz	Kuyavian-Pom.
5	Krosno	Podkarpackie
6	Gdynia	Pomerania
7	Krakow	Lesser Poland
8	Opole	Opole
9	Pila	Greater Poland
10	Tarnow	Lesser Poland
11	Dabrowa Gornicza	Silesia
12	Szczecin	West Pom.
13	Plock	Masovia
14	Rzeszow	Subcarpathia
15	Radomsko	Lodz

gen-powered car in Poland was created by scientists at the Technical University of Lublin in 2012. The city is working to establish better connections from municipal facilities to the special economic zone in the city. For practical support, companies in the city can hire trainees without having to provide a contract, boosting the availability of workforce for investors. ■