



Location Spotlight – Tri-city, Poland

July 2024: Complimentary Abstract / Table of Contents

Market Report
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Parul Jain, Vice President

Gunjan Mundra, Senior Analyst

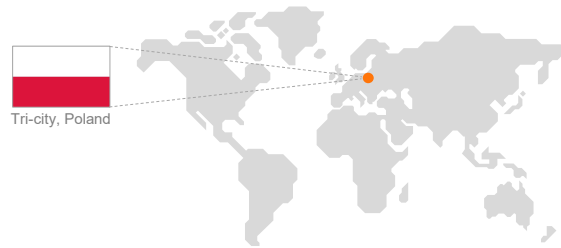
Aryan Gupta, Research Associate

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This report provides perspectives on key aspects of the global sourcing market in Tri-city

Tri-city | executive summary



Moderately attractive

Key factors



Current overview

- Tri-city: a metropolitan region in Poland with Gdansk, Gdynia, and Sopot, all located along the coast
- Gdansk is the most mature location, hosting over 75% of the region's global services activity, followed by Gdynia, and a very limited activity in Sopot
- Moderately mature location leveraged by providers and Global Capability Centers (GCC) for Business Process (BP) and IT services delivery, evidenced by the presence of global organizations

Key drivers

- Multilingual scalable workforce proficient in English, German, and other European languages
- Significant cost savings compared to other UK tier-1 cities (63% less than London) and Tier-1 cities Poland (15% less than Warsaw)
- Stable business environment supported by favorable government policies, incentives, safety, and security

KEY PLAYERS:

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Tri-city | operating and business environment risk profile (page 1 of 2)

Offers moderately favorable infrastructure facilities, featuring a comprehensive network of domestic and international transport connections

■ Significant challenges ■ Favorable, with some concerns ■ Highly favorable

Parameter	Everest Group rating	Comments
<p>Geopolitical</p>	■	<ul style="list-style-type: none"> Poland's relationship with Russia is historically complex and often contentious. Current relations are strained, particularly due to its strong opposition to Russia's actions in Ukraine The diverse ideological composition of the coalition including the Centrist Civic Coalition, The Left, and the Third Way coalition introduces challenges in maintaining cohesive policymaking. Differing views on social, economic, and institutional issues may create tensions within the government Poland is ranked 41st out of 167 in the Democracy Index 2023 compiled by the Economist Intelligence Unit (EIU), indicating flawed democracy in the country
<p>Macroeconomic</p>	■	<ul style="list-style-type: none"> The IMF forecasts a GDP growth of 3% for 2024, a significant increase from the 0.1% growth in 2023. This substantial rise is primarily driven by increasing private consumption, declining inflation, wage growth, and heightened public investment Poland's fiscal deficit is projected to remain relatively high due to increased spending on defense and energy transition Fitch's credit rating for Poland is reported at A- with a stable outlook, indicating a steady economy There is a risk to Poland's macroeconomic outlook due to a diverse government coalition that struggles to agree on economic policies
<p>Infrastructure</p>	■	<ul style="list-style-type: none"> The Tricity area features a substantial supply of Class A office space housed in buildings less than six years old, ensuring a high standard of premises The location also has good infrastructure facilities including a well-developed road and air network Gdansk Lech Walesa Airport, one of the three busiest international airports in Poland, offers a comprehensive network of domestic and international transport connections Gdansk and Gdynia both host active ports, with Gdansk being Poland's largest port

Source: Everest Group (2024); EIU; Transparency International; World Bank; WEF; investment agencies; interviews with market participants

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	Published	Current release	Planned
Reports title	Release date		
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Location Spotlight – Riga, Latvia			March 2024
Harnessing Potential – Growth in Southeast Asia's Service Delivery Sector			March 2024
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Global Locations State of the Market 2024 – Key Trends Shaping the Landscape			June 2024
Location Spotlight – Coimbatore, India			June 2024
Egypt's Value Proposition and Competitiveness for IT-BP-ER&D Services Delivery			June 2024
Location Spotlight – Tri-city, Poland			July 2024
Location Spotlight – Monterrey, Mexico			Q3 2024
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Dallas (Headquarters)

info@everestgrp.com

+1-214-451-3000

Bangalore

india@everestgrp.com

+91-80-61463500

Delhi

india@everestgrp.com

+91-124-496-1000

London

unitedkingdom@everestgrp.com

+44-207-129-1318

Toronto

canada@everestgrp.com

+1-214-451-3000

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