

Business services in Radom



Report prepared for Radom City Hall
by the Association of Business Service Leaders (ABS L)

in cooperation with JLL, Randstad Polska and Randstad Sourceright



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www.ponad.pl The logo for Ponad, featuring the word "Ponad" in a blue sans-serif font with a stylized "P" icon to the left.

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1

WHY RADOM?

Radom is a city of more than 200,000 people located in central Poland; it is the second largest city in Mazowieckie Province in terms of population (after Warsaw), and the 14th-largest in the country. It is an academic, social and economic hub for many functions having subregional reach.

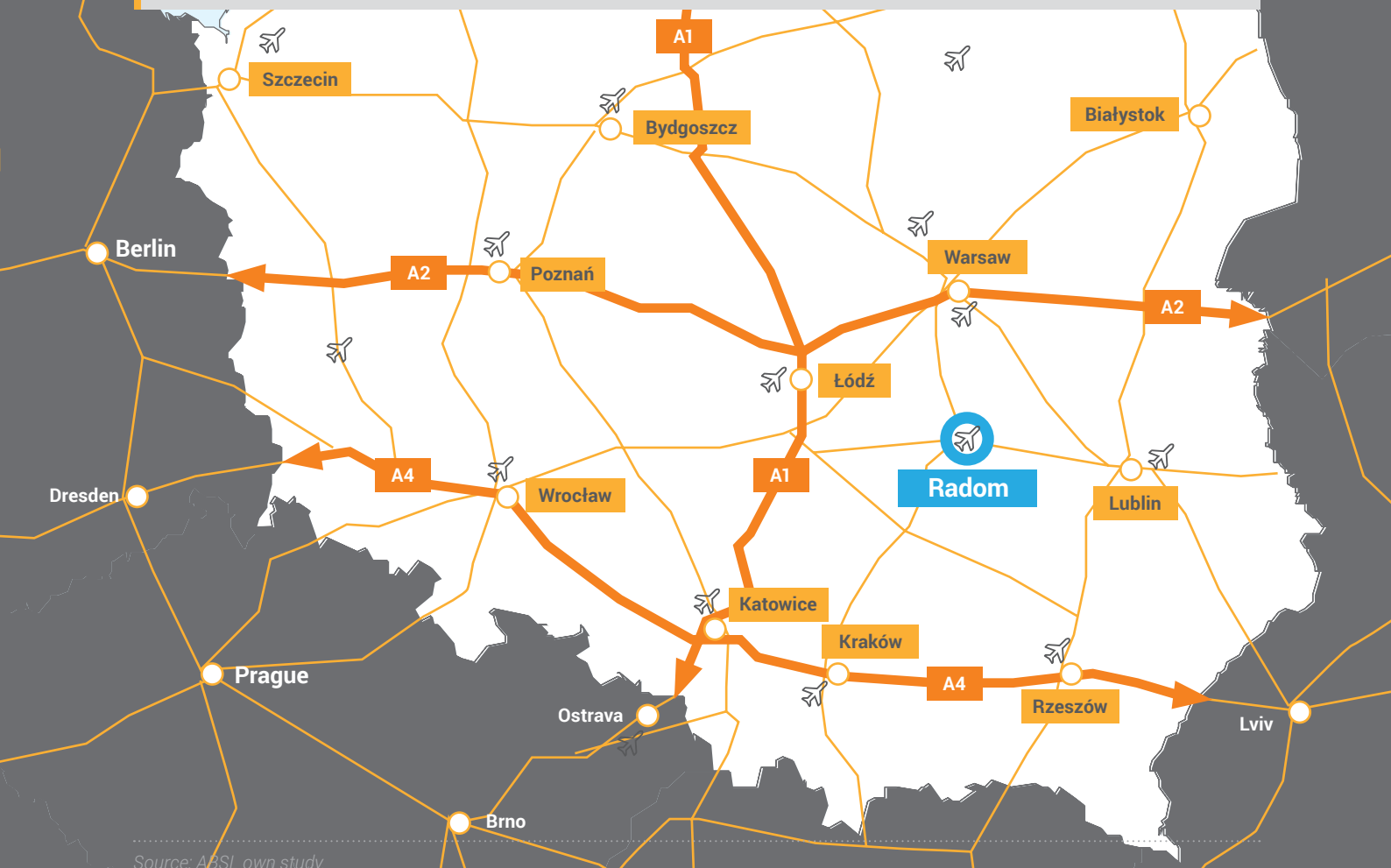
By creating important programs for development, the city can significantly raise its status in the coming years. Radom's most important growth impulses include:

- » the construction of the Radom bypass, part of the S7 highway,
- » the modernization of the rail line to Warsaw, which will greatly improve rail travel times to the capital (planned for completion in 2023),
- » the project to convert the old Weapons Factory into modern office space,
- » the expansion of Radom Airport, which by 2020 will act as a supplement to Chopin Airport.



Source: Radom City Hall

FIGURE 1
LOCATION OF RADOM



Source: ABSL own study

TABLE 1
DISTANCES AND ANTICIPATED TRAVEL TIMES
TO SELECTED CITIES

	Distance (km)	Travel time	
		By car	By train
Warsaw	93	1h 30min	2h 00min
Łódź	124	2h 30min	4h 00min
Kraków	171	2h 55min	2h 45min
Berlin	545	6h 50min	9h 05min
Frankfurt am Main	890	11h 20min	13h 19min**
London	1,450	17h 00min	21h 00min***

* One asterisk means one transfer required.

Sources: Deutsche Bahn, Goeuro, Google Maps, PKP PLK

EXTERNAL ACCESSIBILITY OF THE CITY

Radom is located in the center of Poland, where important European roads (E77 and E371) and railways (E65) connect. Good access to road transport is provided by the S7 express road and national roads 9 and 12. Radom also has direct rail links: No. 8 (to Warsaw and Kraków), No. 22 (to Tomaszów Mazowiecki) and No. 26 (to Łuków). The city is served by Radom Airport (RDO), with initiated investment process. Less than 100 km from Radom is Chopin Airport (WAW), which provides access to the most important global hubs (including London-Heathrow, Frankfurt am Main, Chicago-O'Hare, Paris-Charles de Gaulle, Beijing, Madrid, Amsterdam, Dubai, Hamad) and 51 cities around the world. It is Poland's largest airport. Numerous investments are currently underway that will systematically expand the city's transport access in the near future.

Reykjavík

CHOPIN AIRPORT (WAW)

Distance and travel time
from the center of Radom



105 km / 1 h 30 min

Number of countries served



51

Number of air destinations



121

Total passenger traffic



15.75 mln (2017)

18 mln (2018*)

* Forecast

Number of airlines



31

Selected airlines flying regular schedule flights



PLL LOT, Wizz Air, Ryanair, Lufthansa, Emirates, Air France,
British Airways, KLM

In an hour and a half you can get from Radom to Poland's largest airport – Chopin Airport in Warsaw (WAW). From there, there are connections to 51 cities around the world, and flights to Amsterdam, Paris and London take less than 3 hours.

4 km from the center of Radom is Radom Airport (RDO). It is currently being expanded. The first flights will take off from Radom in the summer of 2020. The airport will then be able to handle 3 million passengers per year, making it complementary to Chopin Airport.

Source: www.rynek-lotniczy.pl

Toronto

Los Angeles

Chicago

New York

Newark

Agadir

Liverpool

Birmingham

Bordeaux

Santander

Porto

Lisbon

Madrid

Barcelona

Malaga

Alicante

TABLE 2

NUMBER OF DIRECT FLIGHTS TO SELECTED CITIES (PER WEEK)
AND FLIGHT TIMES

Frankfurt am Main	50	1h45min-1h55min
Amsterdam	43	2h05min-2h15min
Paris-Charles de Gaulle	47	2h25min-2h35min
London-Heathrow	40	2h40min-2h50min
London-City*	12	2h45min

* from 7 January 2019

Source: www.lotnisko-chopina.pl, Google Flights

AIR TRANSPORT TO CHOPIN AIRPORT (WAW)



2

BUSINESS SERVICES CENTERS IN RADOM

In Radom, quite a few companies provide business services, and the city is looking to attract other domestic and foreign investors to expand that list.

An important element in the process of building Radom's brand as a business services-friendly location is professional, effective cooperation on the part of the local authorities with investors, the commercial real estate industry, recruitment firms, universities, and business institutions. The city's position on the business services centers map may also grow by introducing appropriate solutions for managing and developing the city, and by a long-term policy for supporting training (taking account of the dual education system already developed in cooperation with Radom universities).



Source: Radom City Hall

FIGURE 3

BUSINESS SERVICES SECTOR IN RADOM – KEY INFORMATION

**1,900**

The number of employees in Radom shared services centers (SSC), business processes outsourcing centers (BPO) and IT centers (as at Q3 2018).

**15**

The number of business services centers in Radom (Q3 2018). Foreign entities account for 4 of the 15 centers in Radom.

**5,000**

Employment potential (the number of jobs that can be generated) in business services centers in Radom, forecast by ABSL to 2025.

Source: ABSL own study

PROSPECTS FOR GROWTH IN THE BUSINESS SERVICES SECTOR IN RADOM

In the next two years, Radom should be very well prepared to greet investors from the business services sector within the scope of various outsourcing, shared services and IT projects. Obtaining recognition in the industry can help the city attract further investors under a snowball effect.

Radom's proximity to Warsaw, and its improving transport access, are also important factors in the context of the 'degglomeration' of centralized institutions, that is, the possibility of Radom becoming the location for operations centers working, e.g., for government agencies in Warsaw.

Competitive advantages of the city:

- » **Proximity to Warsaw (100 km)** – one of the largest business services locations in Europe – with improving transport access from Radom to the country's capital.
- » **The possibility of obtaining experienced staff** working in the business services sector in Warsaw (in particular, qualified specialists now commuting from Radom to the capital) who, after appropriate recruitment processes, could be interested in working in Radom, either located there or remotely, for the Radom branches

of companies headquartered in Warsaw.

- » **The second-largest center for higher education** in Mazowieckie Province: more than 7,000 students.
- » **Preparations for building new class A office** premises in the city center.
- » **A tailor-made offer for investors** from the business services sector.
- » **Cost arbitrage**: one of the factors stimulating industry investments, connected with the search for improved effectiveness.
- » **A concentration of companies providing services** in the area of customer contact centers.

For Radom, ABSL recommends multiple activities aimed at strengthening the city's creative and business resources in various spheres (economic, social, cultural and spatial). In order to build up the city's brand as a business services-friendly location, it is very important to conduct activities that involve the creation and later reinforcement of the local community of IT companies. Using its competitive advantage, Radom can become one of the best examples of a medium-sized city having appropriate resources that enable it to become part of the business services sector ecosystem in Poland.

Business services centers in Radom

TABLE 3

SERVICES CENTERS OPERATING IN RADOM

Name	Type of center	Year activities in Radom began	Parent company headquarters location	Employment level	Activities profile
Archiplex	BPO	2010		<100	Business services in the area of document archiving and management.
Centrum Informatyki Resortu Finansów	IT	2011		100-250	The company's core activities include the administration and development of the centralized ICT infrastructure of the Ministry of Finance (including the National Fiscal Administration).
Centrum Powiadamiania Ratunkowego (CPR)	SSC	2012		100-250	Processing emergency calls for the needs of the Police, State Fire Service and Polish Emergency Medical Services.
GWK System	BPO	2008		<100	Customer services.
Idea Call Center	BPO	2013		<100	Customer services.
Instytut Monitorowania Mediów	BPO	2007		<100	Media monitoring services (searches, analyses and archiving of materials obtained from the media).
Iron Mountain	BPO	2009		250-500	Document management, data protection and information destruction services.
Kantar Millward Brown	BPO	2008		250-500	Market and public opinion survey services.
Medicover	SSC	2016		100-250	Customer services.
Mobile Traffic DATA	IT	2015		<100	IT services.
Moja Recepcja	BPO	2016		<100	Customer services.
Multimedia Interactive	BPO	2016		100-250	Outsourcing within the scope of front and back office, IT, HR, accounting and legal.
Olitel	BPO	2014		100-250	Telemarketing and comprehensive customer services.
Opinia24	BPO	2016		100-250	Market survey services conducted using telephone (CATI), internet (CAWI) and mixed-mode techniques.
Telbridge	BPO	2007		100-250	Customer services.

Source: ABSL own study

The majority of centers in Radom provide their services in Polish. Several companies also employ people who handle processes in foreign languages (mainly English and German). It is worth adding that many specialists work in Radom remotely, particularly for many IT companies in Poland.



RADOM - a city of modern business services

ARP (IDA) invests in revitalisation of the Fabryka Broni (Arms Factory)

Agencja Rozwoju Przemysłu (Industrial Development Agency) is opening up to urban development. The first city on its list is Radom. In 3 years' time, 14 thousand sq. m of office space will be made available at a modern business centre in the former Fabryka Broni (Arms Factory). What once was the industrial heart of the city, forgotten during the period of economic transformations, will gain a fresh, new look thanks to the ARP (IDA) investment.

The first offices will be commissioned in 2021. The office building will meet the highest A-class standards and expectations of the most demanding customers.

It is no accident that the ARP (IDA)

chose Radom as the first city for implementation of its Program Fabryka (Factory Programme). The city has numerous competitive advantages, including availability of educated human resources, continuously improving railway and road transport as well as the energy of its inhabitants.

1st floor

4,000 sq. m of commercial space
(gastronomy, trade, education, health)

2nd, 3rd and 4th floor

14,000 sq. m of office space

Two covered internal courtyards,
1,800 sq. m each

Located in the centre of Radom,
approx. 500 m from the railway
station, near National Road No 12

Radom, ul. Przemysłowa 9

Contact:

Sebastian Murawski

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+48 885 600 138

**The owner of the Factory is Agencja
Rozwoju Przemysłu S.A. (Industrial
Development Agency JSC).**

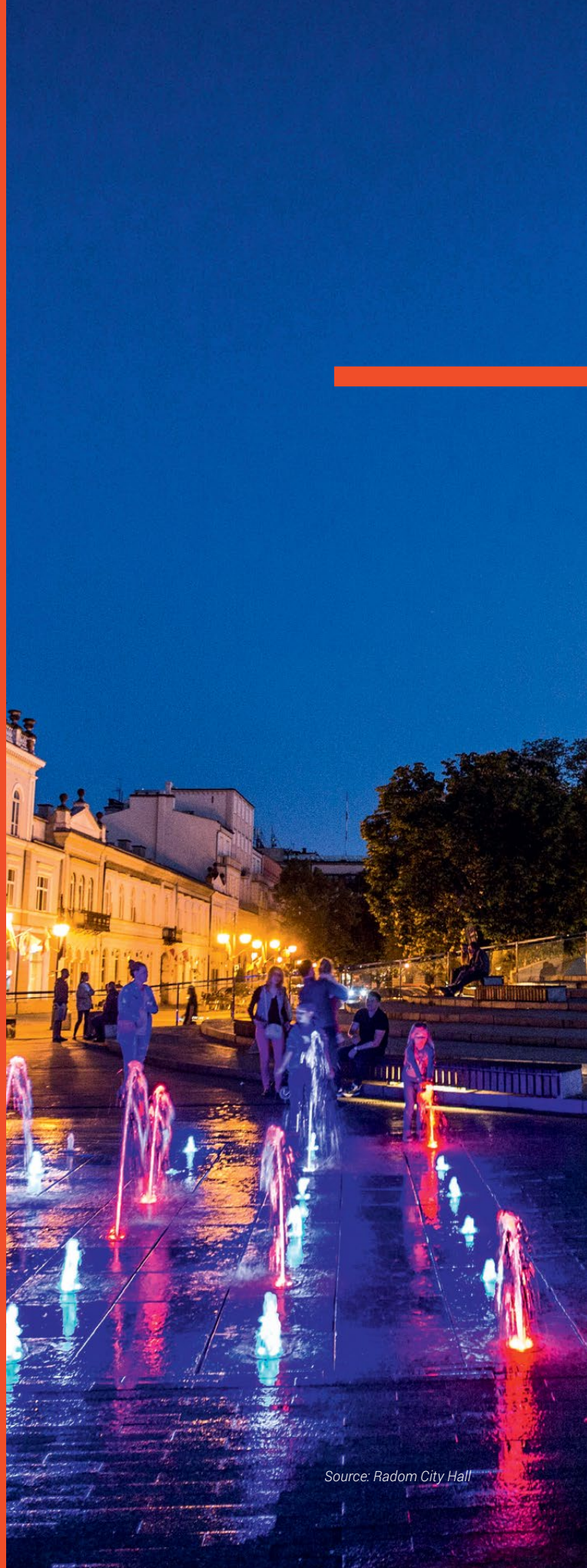


3

INVESTORS ABOUT THEMSELVES: SUCCESS STORIES

Among a dozen or so companies that provide business services in Radom, over the past three years most have increased their staff and expanded their activities. It is worth adding that this growth has been seen in both small outsourcing companies and those recognized internationally.

In this part of the publication, we present two companies as examples of local investment successes (Institute of Media Monitoring and Medicover); we cover the activities of their branches and describe their plans for their presence in Radom in the coming years.



Source: Radom City Hall



The Institute of Media Monitoring is an innovative Polish company established in Warsaw, in 2000. IMM provides services in the field of media research in the form of specialist reports. The main IMM's customers are PR agencies, big and small enterprises and public administration. Dynamic growth of IMM resulted in opening a regional division in Radom. IMM soon became one of the most important employers on the market, offering employment to people at the beginning of their careers. Currently nearly 100 employees work on three shifts and research one million website and social media channels, 250 TV and radio stations and one thousand press titles. The work is carried out for big and small

companies and institutions to immediately let them know about all opinions about their actions or products published in all kinds of media sources.

Radom division of the Institute of Media Monitoring is developing simultaneously with the city, whose life it has grown into for 11 years. IMM's office has been recently renovated and recruitment for various positions is being carried out all the time. In 2017 IMM equipped the Children's Department of Radom Specialist Hospital with deckchairs to serve parents visiting ill children. The company also regularly appears at local job fairs to support the labor market in Radom.



MEDICOVER

Medicover Polska is part of Medicover - a leading international provider of health care and diagnostic services since 1995.

Medicover has been providing comprehensive medical care to patients in Poland for more than 20 years, including outpatient care, laboratory diagnostic and imaging services, dental care and comprehensive hospital care. Services in the form of plans and medical insurance packages are available to both companies and private individuals.

As a result of its rapid growth, Medicover opened its Customer contact center in Radom in January 2016. In the two years that followed, the Radom location established a strong presence on the local job market. It currently employs more than 150 people in a wide

range of roles. In 2017, Medicover Polska's Radom team added another department, a Financial Shared Services Center that would handle the company's financial documents.

Our employees appreciate the outstanding working conditions provided - a modern office space in the Radom Office Park, which is Radom's most desirable office address. The clear set of workplace rules, modern organization design, transparent remuneration structure and excellent growth opportunities further enhance the workplace experience. Our team enjoys a family-like environment, with a focus on mutual support and eagerness to assist others with the tasks at hand. Our employees also highly value Medicover Polska's reliability as an employer, its strong market standing and adherence to high ethical standards.

4

THE LABOR MARKET

The labor market in Radom is characterized by lower operating costs compared with the largest business services locations in Poland. For example, in the area of customer services, people in specialist positions can expect remuneration between PLN 2,500 and 4,000 per month. In the area of F&A: GL and F&A: AP/ AR remuneration ranges from PLN 3,000 to 6,000 per month (specialist positions). Employers can count on the availability of a large pool of potential employees. Investing in their development provides them with the specialized knowledge required to work in the industry. The availability of training and opportunities for development is one of the most attractive job benefits, according to candidates.

Chapter content development: **Randstad Polska and Randstad Sourceright**

Randstad Polska is the largest personnel consulting and temporary staffing agency on the Polish market. By combining our passion for people with the power of today's technologies, we support people and organizations in realizing their true potential.

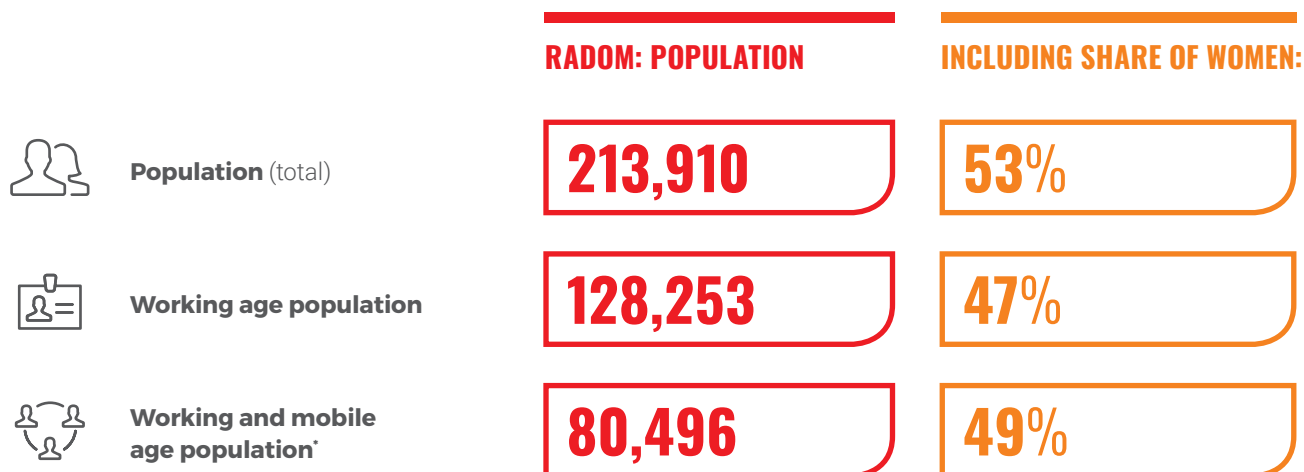
Randstad Sourceright is a global talent solutions leader, driving the talent acquisition and human capital management strategies for the world's most successful employers. We continuously build and evolve solutions across recruitment process outsourcing (RPO), managed services programs (MSP), and integrated talent.



Source: Radom City Hall

FIGURE 4

BASIC DEMOGRAPHIC INFORMATION ON RADOM

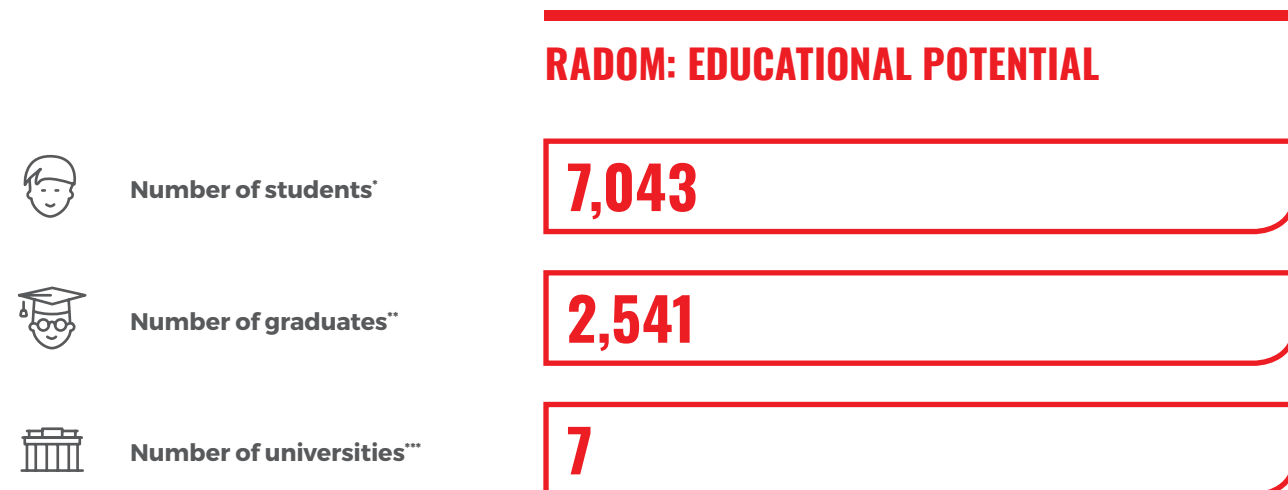


* age range contained within the working age bracket and comprising persons (aged 18-44) who are able to move to a different position or place of work, or can re-train

Source: Central Statistical Office (December 2017)

FIGURE 5

EDUCATIONAL POTENTIAL OF RADOM



* winter semester academic year 2017/2018 as at 30 April 2018

** persons who completed their studies in the period from 1 October 2016 to 30 September 2017

*** including universities outside Radom that have units running faculties in Radom

Source: National Information Processing Institute (Ośrodek Przetwarzania Informacji – OPI); data from the POL-on information system on higher education

FIGURE 6

NUMBER OF STUDENTS IN THE LARGEST UNIVERSITIES IN RADOM



Public universities

4,097

KAZIMIERZ PULASKI UNIVERSITY
OF TECHNOLOGIES AND HUMANITIES
IN RADOM



Private universities

1,862

RADOM ACADEMY
OF ECONOMICS

331

PRIVATE UNIVERSITY OF
ENVIRONMENTAL SCIENCES
IN RADOM

262

EUROPEAN UNIVERSITY
IN RADOM

221

COLLEGE OF WORK AND SAFETY
ENGINEERING IN RADOM

169

RADOM UNIVERSITY

110

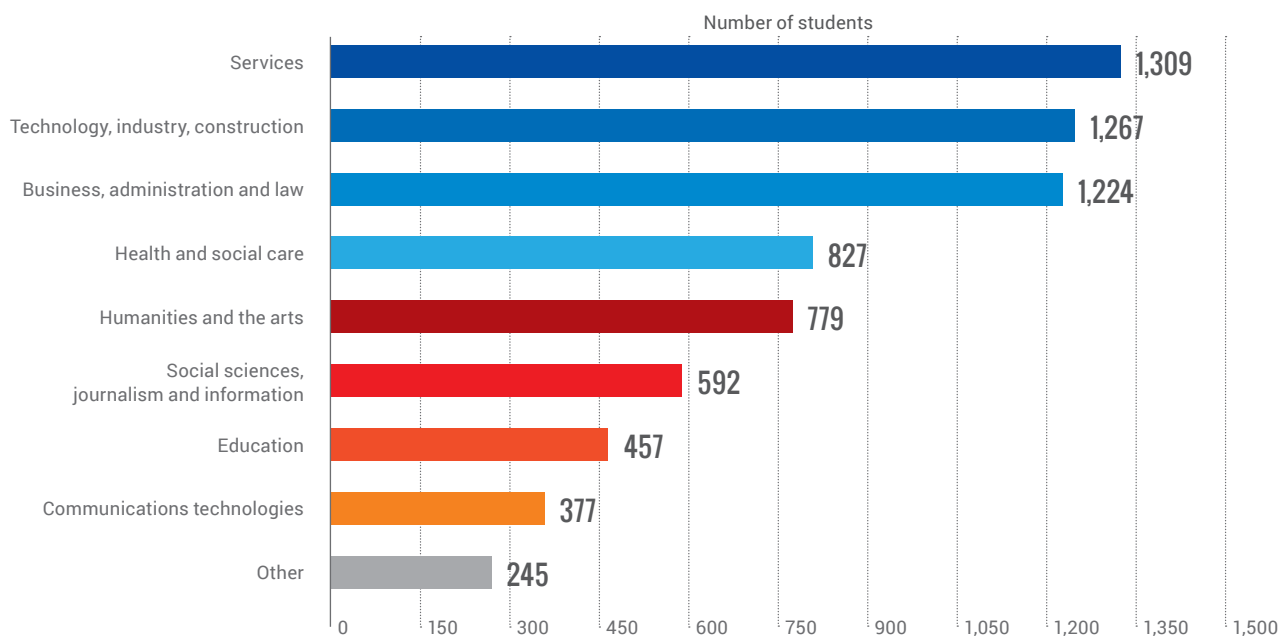
BISHOP JAN CHRAPEK BUSINESS
SCHOOL IN RADOM

Note: only persons studying in Radom are taken into account.

Source: National Information Processing Institute (Ośrodek Przetwarzania Informacji – OPI); data from the POL-on information system on higher education; academic year 2017/2018

FIGURE 7

NUMBER OF STUDENTS BY STREAM (ISCED)



Source: National Information Processing Institute (Ośrodek Przetwarzania Informacji – OPI); data from the POL-on information system on higher education; academic year 2017/2018

TABLE 4

GROSS MONTHLY SALARY (IN EUR) AT BPO/SSC/IT/R&D CENTERS IN RADOM

The pay tables are based on an analysis of the remuneration offered in the recruitment processes in the business services sector in Radom carried out by Randstad. Data from Q3 2018

F&A: GL

	min	opt	max
Junior Accountant (1-2 years' experience)	700	740	810
Accountant (2-3 years' experience)	810	860	930
Senior Accountant (over 3 years' experience)	1,040	1,160	1,390
Team Leader (team of 5-15 people)	1,390	1,620	1,860
Manager (team of up to 50 people)	1,620	2,090	3,480

F&A: AP / AR

	min	opt	max
Junior Accountant (1-2 years' experience)	700	740	810
Accountant (2-3 years' experience)	810	860	930
Senior Accountant (over 3 years' experience)	1,040	1,160	1,390
Team Leader (team of 5-15 people)	1,390	1,620	1,860
Manager (team of up to 50 people)	1,620	2,090	3,480

Customer Service

	min	opt	max
Junior Specialist (no experience)	580	650	700
Specialist (over 1 year's experience)	650	700	930
Team Leader (team of 5-15 people)	1,040	1,160	1,280
Manager (team of up to 50 people)	1,740	1,860	1,970

IT

	min	opt	max
1st Line Support (2 years' experience)	840	930	1,090
2nd Line Support (2 years' experience)	1,090	1,160	1,620
3rd Line Support (2 years' experience)	1,620	1,860	2,200
IT Administration (3 years' experience)	1,860	2,090	2,320
Network / Security (3 years' experience)	1,620	2,090	2,780
Business / System Analyst (3 years' experience)	1,860	2,320	2,550
Developer (3 years' experience)	1,860	2,200	3,130
Tester (3 years' experience)	1,390	1,740	2,090
Team Leader (team of 5-15 people)	1,970	2,090	3,020
Project Manager (team of up to 50 people)	2,090	2,550	3,250

Source: Randstad Polska and Randstad Sourceright

CHALLENGES IN RADOM'S LABOR MARKET

The labor market in Radom is characterized by lower operating costs compared with the largest business services locations in Poland. Thinking long-term, this presents an opportunity for entrepreneurs from the business services sector to establish or move branches here. Providing suitable working conditions and investing in specialized internal training will pay off in the future with the formation of complete, experienced teams of employees. As those employees gain new skills, the branch will be able to expand its services to include more complex processes.

Investing in employee development brings dual benefits. The employer can count on having staff that meets its expectations. And for employees, the opportunity to take part in various trainings or have foreign language courses subsidized are attractive benefits that catch the attention of job candidates. An employer who offers the fringe benefits most sought after by employees attracts the best talent, thereby reducing the costs involved in finding such people.

Undoubtedly, valuable support for investors is that of building strong relationships with universities in Radom. Adapting educational programs to the requirements of the business services sector increases the availability of suitable candidates on the market. Those streams of study that are particularly important with respect to employment in business services centers include economics, technical engineering and ICT.

The part played by the city here is vital; it initiates cooperation between universities and companies from the business services sector. Students can apply for scholarships and take advantage of specially prepared mentor programs – series of meetings with business leaders. In the long term, this allows students to develop

their competencies, and graduates to enter the labor market with confidence. The city also takes an active part in university board meetings, thereby having a real impact on the educational models they employ, including the development of dual education in Radom. As a result, students of Radom universities complete their studies with both a complete package of knowledge and practical work skills, including in the business services sector.

In addition to education at the academic level, the secondary schools operating in the city are also worth considering. Their high level ensures that Radom students place high in national competitions. During their education, they attain various certificates increasing their linguistic competence.

New career opportunities reduce the phenomenon of migration. Young people will gladly stay in Radom if they have attractive job offers available and a real chance to building a career in the city. Good conditions on the labor market also encourage former residents of Radom to come home. In this context, it will be beneficial to have in place a consistently implemented strategy for the city's development and special programs that facilitate business investments in Radom. And in fact, these have already been going on for some time – the city makes a great effort to activate programs for integrating the local business community in the business services sector. Series of industry meetings are run. Both new investors and existing businesses can count on support in looking for talented employees. And that's not all: the city promotes and helps develop corporate social responsibility.

All these activities related to the local labor market help build up Radom's brand as a location that is friendly towards investors from the business services sector.

ADVANTAGES OF RADOM AS A BUSINESS SERVICES CENTER LOCATION



Availability of staff trained in Warsaw and other large centers; a pool of employees with experience in business services who commute to work in the capital.



Proximity to Warsaw and improving access to Radom: two airports within 100 km, numerous new infrastructure investments.



A promising office market.



Cost competitiveness compared with Warsaw and regional business services locations.



A proactive, professional, pro-investment policy aimed at investors from the business services sector; a well-developed system of investor incentives.



A long-term policy of local government support for education: growing cooperation between high schools, universities and businesses (an advanced system of dual education), openness on the part of universities to adapt their programs to the needs of investors, a good level of secondary education.

5

THE OFFICE MARKET

Warsaw was the first city in Poland where a modern office market emerged. After the capital city, investors and developers gradually started to look at opportunities in other major cities in Poland, such as Kraków, Wrocław, the Tri-City, Katowice, Poznań and Łódź, and lately in Szczecin and Lublin. The natural course of further office market development will therefore focus on smaller urban centres, which due to their potential will gain in importance and will gradually attract new investments, especially ones from the modern business services sector. We believe that cities such as Radom are highly convenient locations for such processes.

Chapter content development: JLL

JLL is a leading professional services firm that specializes in real estate and investment management. A Fortune 500 company, JLL helps real estate owners, occupiers and investors achieve their business ambitions. At the end of 2017, JLL had nearly 300 corporate offices, operations in over 80 countries and a global workforce of 82,000. More at: www.jll.pl



Source: Radom City Hall

FIGURE 8
RADOM OFFICE MARKET IN NUMBERS



26,200 sq m

Total office stock



5,200 sq m

Office space under construction



9.8%

Vacancy rate



9-10 € / sq m / month

Prime asking rents

22-40 PLN / sq m / month

Rents in B-class buildings

Source: JLL, H1 2018

Emerging cities have one major advantage against big agglomerations. They are a great place for a company to position itself and gain substantial recognition in the city, whereas in major agglomerations only global giants may get such publicity. Therefore, some of the back office functions of a company may be transferred to cities like Radom in search for cost-efficiency and easier recruitment, while maintaining the desired level of provided services. This influences growth of Radom office market and enhances the quality of available product. Especially foreign investors expect the offices to keep up with the office standard as it is in larger agglomerations.

Currently, total supply in Radom equals 26,200 sq m, while vast majority of the office stock was completed after 2012. All of the existing developments are of a moderate scale, which is in line with the demand for office space in the city. However it is important to underline that some of the buildings can become a part of larger complexes, should the need for additional space arise. That translates into convenient expansion possibilities for prospective tenants in Radom. The existing stock in the city is fairly well-let and the vacancy rate is at the level of 9.8%. Buildings completed in the last two years include: Temida Office Building (2017), Radwag HQ (2018) and Kwadrum (2018).

FIGURE 9

MAJOR EXISTING AND UNDER CONSTRUCTION DEVELOPMENTS IN RADOM

- 1 25 Czerwca
- 2 Kwadrum
- 3 LoftHouse
- 4 Radom Office Park A
- 5 Radweg HQ
- 6 Segel
- 7 Słowackiego 84
- 8 Temida
- 9 Victoria
- 10 Warta HQ
- 11 Eko Park Radom

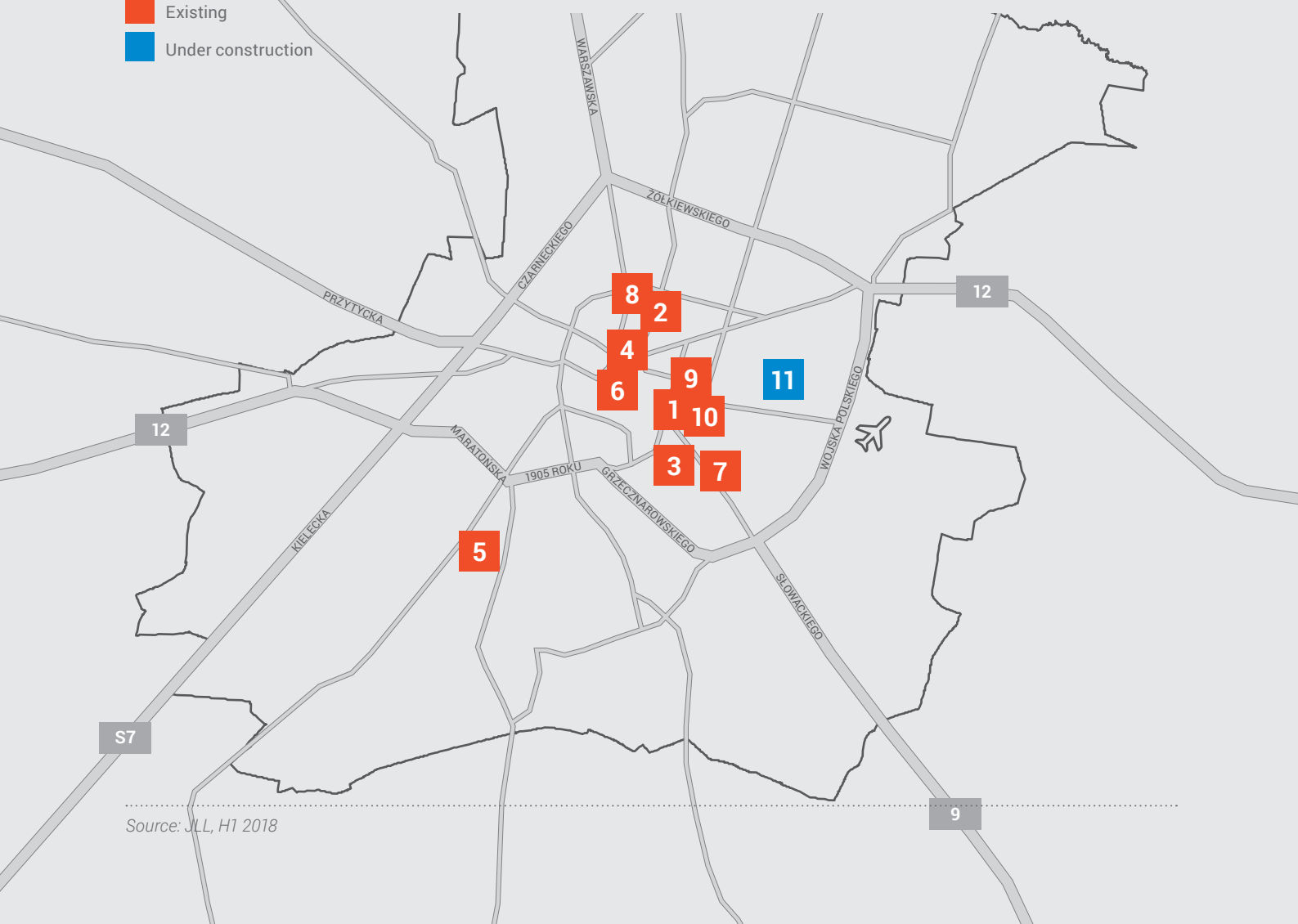
Existing
Under construction

Currently the major development under construction in Radom is Eko Park Radom at 10 Wrocławska st. by Kombud Invest. It is planned to have 5,200 sq m of office area and it is scheduled to be delivered in late 2018.

The pipeline for office schemes is quite substantial, exceeding current stock of Radom, and amounts to more than 40,000 sq m. The largest planned development is Fabryka Broni Łucznik, which upon completion may provide up to 25,000 sq m off office and retail space. Some of the other planned developments entail: the second building of Radom Office Park and Radom Congress Center. Start of the construction of these may be subject to pre-let.

Some of the companies operating in Radom include Kantar, Iron Mountain, Randstad, Polska Grupa Zbrojeniowa (which leased 2,000 sq m in Radom Office Park A in 2015) and Medcover.

Rents and service charges for offices in Radom are usually quoted in Polish Zloty. In Radom Office Park A and Kwadrum, which are the only existing A-class office buildings, the prices are offered in Euros. Asking rents there range between €9.0 and €10.0 / sq m / month, when rents in other, B-class office schemes range between PLN 22 and PLN 40 / sq m / month.





10 000 sq. m.

of class A office and retail space
in Radom's leading project



WHITE STAR REAL ESTATE SP. Z O.O.

ul. Grzybowska 5a, 00-132 Warszawa
tel. +48 22 564 50 00, tel. +48 22 324 50 00, fax +48 22 564 50 85
whitestar-realestate.com

RADOM OFFICE PARK

Centrum Słoneczne
ul. Jacka Malczewskiego 24, 26-610 Radom
tel. +48 22 564 50 00, fax +48 22 564 50 85
radomofficepark.pl

6

TIME ACCESSIBILITY OF RADOM

Radom is located in the center of Poland, where important national roads and railways connect. Just under 100 km away there is the largest international airport in Central Europe – Chopin Airport in Warsaw. This means that Radom has good connections with most of Poland, Europe, and the world.

In this part of the report, we present the results of studies of travel times to Radom for persons traveling by car or public transport. It shows the area from which one can reach the city within 60 minutes, as well as the number of people living within that area. This good access to Radom is largely due to the city's bus and train stations.



Source: Radom City Hall



332,000

the number of people aged 18-44 who can reach the center of Radom within 1 hour using individual transport



188,000

the number of people aged 18-44 who can reach the center of Radom within 1 hour using public transport

INTERNAL ACCESSIBILITY – INDIVIDUAL TRANSPORT

Radom is easily accessible for people commuting to work by car. Almost 870 thousand people can reach the city by public transport within 60 minutes, including 330 thousand people of working and mobile age (18-44). Within reach of that zone outside Radom live 650,000 people, including 250,000 aged 18-44. The area from which one can get to work within an hour covers 7,700 km² and extends 110 km east-west and 130 km north-south. This area covers 13 counties, 69 municipalities and 21 towns.

TABLE 5
NUMBER OF PEOPLE LIVING WITHIN AN ISOCHRONE OF 60 MINUTES FROM RADOM – INDIVIDUAL TRANSPORT

Total	<18 years	18–44	45–65	>65
867,102	154,684	332,067	196,999	183,352

Source: ABSL own study

Method

Travel time was defined for the morning rush hour (7:00-9:00) measured from the center of a village or town to the city limits of Radom. The time of commuting through the city (from the city limits to the center) was estimated as 6 minutes. Travel times were averaged over 5 days a week (Mon-Fri). If the majority of a municipal area lay within the 60-minute isochrone, it was deemed that the whole area has access to Radom within that time.

INTERNAL ACCESSIBILITY – PUBLIC TRANSPORT

Using public transport (train or bus), one can reach the center of Radom within 1 hour from anywhere in the city or its outlying areas. Within 60 minutes, a total of 480,000 people can get there, including 190,000 people of working and mobile age (18-44), and from outside Radom 270,000 people (including 105,000 aged 18-44). The area from which one can get to work by public transport within an hour covers 2,500 km² and extends 80 km east-west and 85 km north-south, referring to the rail lines around the capital. This area covers 8 counties, 26 municipalities and 7 towns.

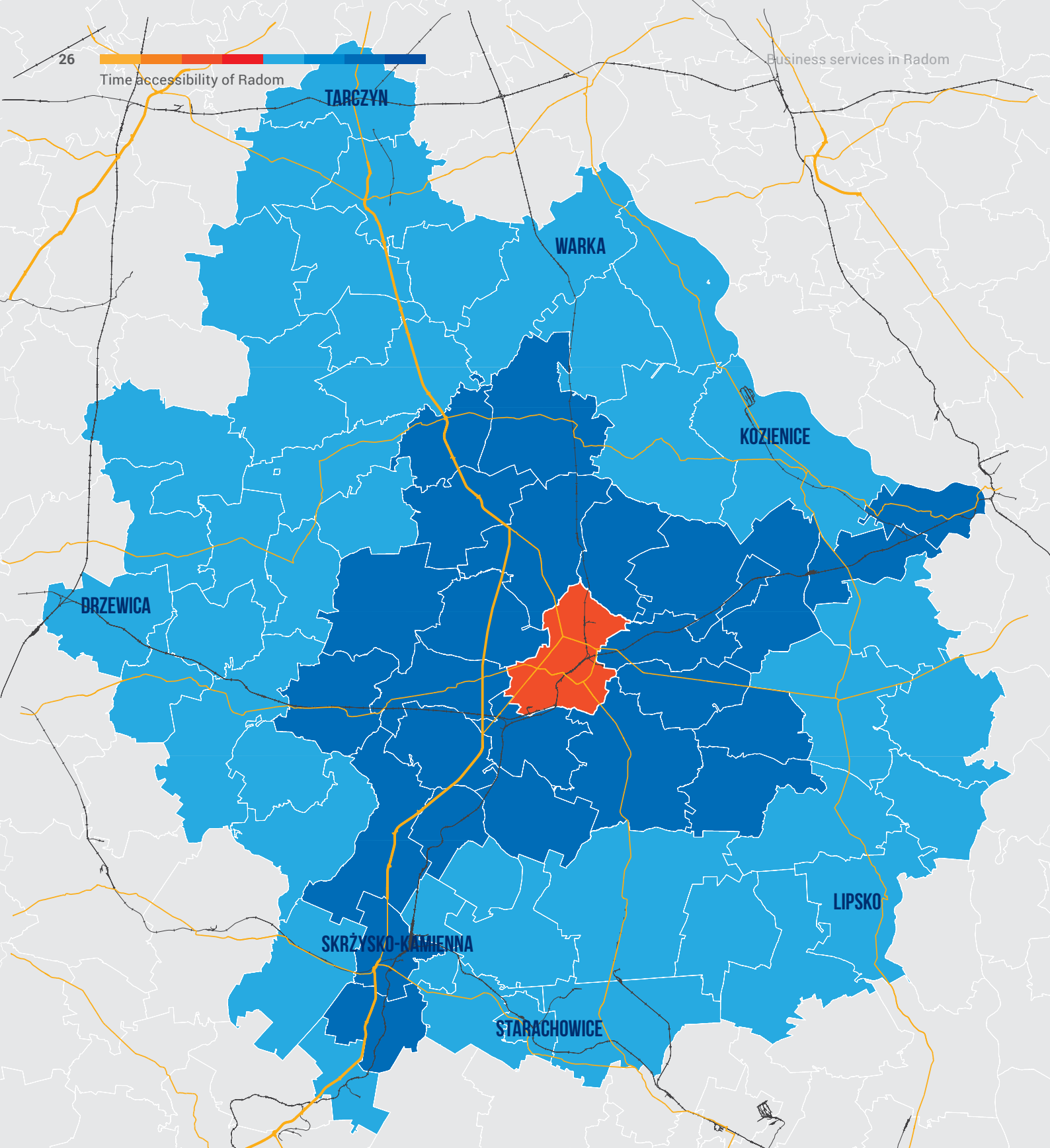
TABLE 6
NUMBER OF PEOPLE LIVING WITHIN AN ISOCHRONE OF 60 MINUTES FROM RADOM – PUBLIC TRANSPORT

Total	<18 years	18–44	45–65	>65
483,093	87,510	187,560	108,068	99,955

Source: ABSL own study

Method

Travel time was defined for the morning rush hour (7:00-9:00) measured from the center of a village or town to the train or bus station in Radom, not counting time to reach the station of departure. The schedule of weekday travel times was taken into account. If the majority of a municipal area lay within the 60-minute isochrone, it was deemed that the whole area has access to Radom within that time.



Roads

Railways

Municipal boundaries

Isochrone of 60 minutes (public transport)

Isochrone of 60 minutes (individual transport)

Radom

SAMPLE INVESTMENTS IN TRANSPORT INFRASTRUCTURE

EXPANSION OF THE RAIL NETWORK

Currently, work is under way to expand rail line No. 8 connecting Radom and Warsaw. After completion (in 2023), the time needed to reach the Polish capital by train will be cut almost in half – to about 1 hour.

Source: www.rynek-kolejowy.pl

DEVELOPMENT OF TRANSPORT IN RADOM:

- » The urban transport network in Radom comprises 25 bus lines, including 9 that also extend beyond the city limits.
- » All of the city's public transport vehicles have low floors, and more than one third meet the highest fuel emissions standards. The fleet is constantly being exchanged (including for electric buses).
- » Radom's Urban Bike System consists of 27 stations and 270 bicycles. It is used by more than 17,000 people.

Source: Radom City Hall, <https://radomskirowermiejski.pl>



Source: Radom City Hall

7

QUALITY OF LIFE AND BUSINESS SUPPORT

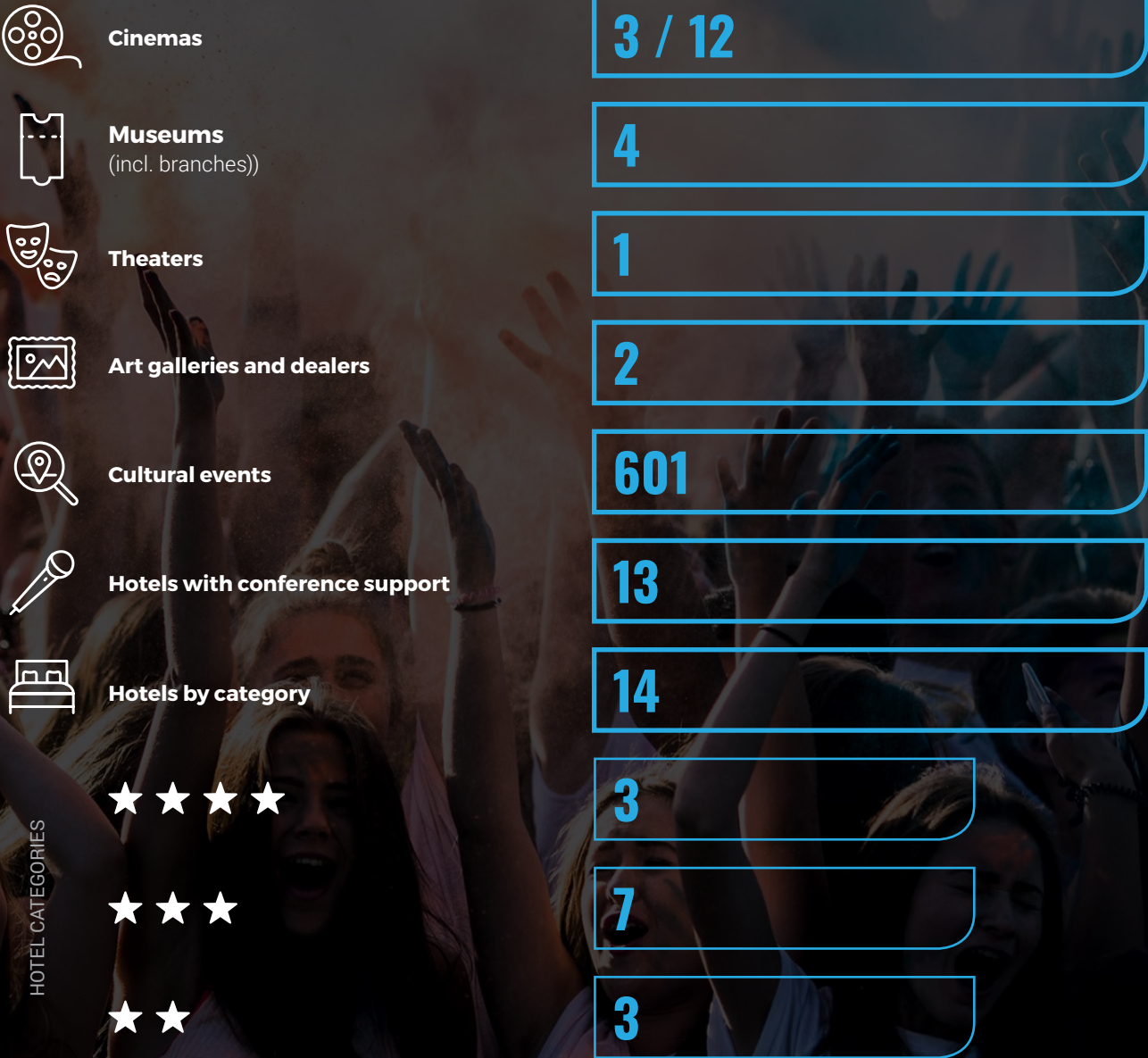
In Radom, the quality of life is continually improving. This is confirmed by the results of rankings and statistics. The city is very safe and has a high level of social capital. Thanks to the large proportion of green areas, the well-developed network of bike paths and public transport, and the continual modernization of the bus fleet, Radom is enjoying sustainable development that takes care of the natural environment.

The city also has a well-developed network of hotels and conference centers. Radom hosts many international cultural events that earn a name for the city around the world.



Source: Radom City Hall

FIGURE 10
SELECTED INFORMATION ON CULTURAL FACILITIES AND HOTEL AND CONFERENCE FACILITIES IN RADOM



Source: ABSL own study based on: GUS (2017)

2nd place in a ranking by Polityka weekly

In a ranking prepared by the influential Polityka weekly on the quality of life in cities, Radom came in second in Poland in terms of how residents' activities benefit local communities.

Source: www.polityka.pl/niezbednik/rankingmiast



Green city

According to the Central Statistical Office, 16% of the city is covered by green areas – woods, parks, green belts and green estates.



High quality rolling stock in public transport

Passengers in Radom are served by 185 buses. All of these are low-floor vehicles. 40% of them are eco-friendly vehicles that meet the highest fuel emissions standards.

38 buses make their way around the city running on CNG fuel.



Good access to preschools

There are 55 preschools in Radom with 6,900 places.



Two Radom sports teams take part in the country's top leagues: Cerrad Czarni Radom (volleyball) and ROSA Radom (basketball).



A safe city

Radom holds third place in a ranking of safety in the 17 largest Polish cities conducted by Home Broker.



Bike-friendly city

In Radom, there are 81 km of bike paths – 3.8 km per 10,000 inhabitants. In the last 7 years, the bike path network has been expanded by a factor of 3.5.



Radom – city of culture

Important cultural events having international reach are held in Radom. These include:

- » the Krzysztof Penderecki International Composers' Competition,
- » the International Gombrowicz Festival,
- » the Mikołaj of Radom International Ancient Music Festival,
- » the Radom Open International Dance Formation Tournament.

Radom Air Show

The Radom Air Show is the largest event of its kind in Poland, one of the largest in Central and Eastern Europe, and one of the most prestigious in the world. It is held every two years at Radom Airport. The Radom Air Show is also a meeting place for representatives of industry, the economy and politics, as well as for all those interested in technology and aviation.



8

INVESTOR SUPPORT

Radom City Hall has a unit dedicated to serving investors: the Department of Radom Economic Zone Service. The department is a contact point whose activities stimulate the local economy. It monitors conditions for doing business in Radom, and reacts to developmental challenges and the needs of potential investors. It provides comprehensive services for investment processes at every stage of implementation, and postinvestment care for businesses having a presence in the city.

It encourages investment in Radom through its business support programs, which include real estate tax relief dependent on the number of new jobs created. The city is also home to the Radom Subzone of the Tarnobrzeg Special Economic Zone.

<http://en.investinradom.pl>



Source: Radom City Hall

COMPREHENSIVE INVESTOR SERVICES IN RADOM

Activities related to investor services include support packages: Pioneer, Progress, Micro and Idea that cover the following subject areas and forms of activity:



A SYSTEM OF TAX INCENTIVES:

- » for investments in the Special Economic Zone;
- » for local tax relief for up to 15 years.



A PERSON DEDICATED TO THE PROJECT (PROJECT ADVISER):

- » advice on choosing investment properties;
- » support in the process of obtaining administrative decisions;
- » assistance with the recruitment process;
- » support in contacts with business community institutions, companies, universities and secondary schools.



EDUCATION:

- » support in implementing dedicated teaching programs;
- » assistance with joining in on the dual model of education;
- » organization of meetings at universities and secondary schools.



POST-INVESTMENT CARE:

- » assistance with building up a company's image;
- » networking.



RECRUITMENT:

- » organization of job fairs;
- » support in recruitment visits at universities and secondary schools and in reaching career offices;
- » promotion of recruitments on the websites of City Hall and partners;
- » financing of scholarships for students training in companies.

radom
power in precision

CONTACT:

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26-602 Radom

+48 48 36 20 866

INFOLINE: 0 800 INVEST
0 800 468 378

rsg@umradom.pl

<http://investinradom.pl>

FIGURE 11

POLAND – KEY FACTS

SELECTED ECONOMIC INDICATORS**GDP growth****4.6%** (2017)**4.6%** (2018)***GDP per capita** (2017)**12,100 €****Unemployment rate** (October 2018)**5.7%****Inflation** (October 2018)**1.8%****EUR/PLN** (average)**4.26** (01.01.2018-31.10.2018)**USD/PLN** (average)**3.58** (01.01.2018-31.10.2018)

Poland has the ninth-largest economy in the European Union in terms of nominal GDP (466 billion euros in 2017) and has been a leader in economic growth in the EU in the past ten years. One of the most important branches contributing to the growth of Poland's economy is the business services sector. The industry's impressive growth in recent years enabled Poland to strengthen its standing among the world's most important locations for investments into (BPO, SSC, IT and R&D) business services centers.

Language: **Polish**

Currency: **złoty (PLN)**

Number of cities with over 100,000 residents: **39**

Number of direct foreign investments in 2017:
335 (1st place in EU)

POLAND IN INTERNATIONAL ORGANIZATIONS

EU (2004), NATO (1999), OECD (1996), WTO (1995), UN (1945) and others

* Forecast

Source: Central Statistical Office of Poland, National Bank of Poland



Modern office and commercial space with excellent access

ul. Żółkiewskiego
Radom, Poland



TG OFFICE PARK are modern office buildings, part of TG PARK complex.
Investment is located in the industrial district of Radom with access to National Road no. 9.
The city center is only 5 km away and Radom Airport only 3.5 km!

Standard: **Class A**

Number of office floors: **4**

Number of office buildings: **2**

Office space (per building): **4,500 m²**

Easy access to TG PARK
through the network of city roads and
public transport. Entire investment
will consist of office buildings
and four warehouses.

Status: Office Park - design phase
Warehouses - under construction

Rental enquiries:

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Leasing Specialist

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phone: 695 212 145



