GBS Next stop: Tricity

Exploring the Tricity and Pomerania region potential as a business service sector destination

2026

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Preface

Tricity has always played a pivotal role in Poland's economic landscape, not only because it is the largest maritime-focused economic hub in Poland but also because it offers a unique business environment, which harmoniously blends technological advancement with a human-oriented approach to development.

In the last decade, Tricity has established itself as a strategic hub for modern business services, constantly attracting new investors and professionals who value excellent quality of life alongside strong growth prospects. This momentum is clearly reflected in the high number of successfully delivered investment projects and the substantial volume of new workplaces created across sectors.

With the transformation of GBS sector toward knowledge-intensive, digital, and AI-enabled functions, the growing maturity of the Tricity market is generating strong demand for advanced analytical and technological roles. Tricity's transformation from a strictly maritime hub into one of Europe's most dynamic and future-oriented economic engines, demonstrates the strength of its unique characteristics.

Its openness to innovation, strong social capital, and ability to adapt to global trends creates an environment in which both residents and investors can thrive on an international scale.

Tricity is well positioned to remain a competitive, agile, and highly attractive destination for investments and top talents supported by the strengths of the Pomeranian region. The ongoing change is a chance to view the region not merely as a cost-effective location, but as a mature and forward-looking ecosystem with experienced specialists across sectors, a strong culture of collaboration, and a growing capability to deliver services at the highest level. Supported by a strong academic base, Tricity and the wider Pomeranian region provide an environment where innovation is matched by stability, and where growth is driven as much by people as by technology.

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Preface

Invest in Pomerania

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I have had the privilege of working with global companies considering Pomerania as their next location for well over a decade. The conversations have changed – and changed significantly.

In the early years, the pitch was straightforward: competitive costs, an educated workforce, and a city worth living in. That was enough. Today, the leaders sitting across the table ask different questions. They want to know about talent pipelines five years out. They ask about energy security, about the regulatory environment, about whether the region can support not just a back--office operation, but a genuine center of excellence. The bar has moved – and in our view, so has Pomerania.

That shift is what prompted this report. We felt the time was right to take stock of where the region stands in 2026 – not through the lens of potential, but through the lens of evidence. What functions are already being performed here, at what scale, and by whom? What does the talent market actually look like? What are the companies already here saying about their experience?

To answer those questions rigorously, we partnered with KPMG – whose analytical depth and market perspective have shaped every chapter of this publication. The result, I believe, is the most comprehensive picture of Pomerania's GBS sector we have ever put to paper.

To those of you reading this as you evaluate your next location decision: I hope this report gives you what you need to make a well-informed choice. And to those of you already operating here – thank you. Your presence, your reinvestments, and your ambition are the strongest argument we have.

Introduction

The global business services landscape has entered a state of recalibration. As multinational enterprises navigate the currents of technological innovation waves and geopolitical uncertainty, the question of where to locate complex business functions has never been more strategical. In this environment, established assumptions about which cities and regions constitute credible GBS destinations are being systematically challenged. Thus a new generation of locations, defined by genuine structural advantage, is stepping forward.

The Pomeranian Voivodeship, and the Tricity agglomeration at its center, is one such location. Gdansk, Gdynia, and Sopot form the urban region with over 1.6 million inhabitants – Poland's third largest metropolitan area and its only major agglomeration with a direct access to the Baltic Sea. The Tricity's maritime identity has shaped everything from its infrastructure investment to the business culture, producing a region that is capable and eager to fulfill business services investment demands. It is a city region that has originated at the intersection of Central European industry and international commerce, and one that carries this experience into every aspect of its economic offer.

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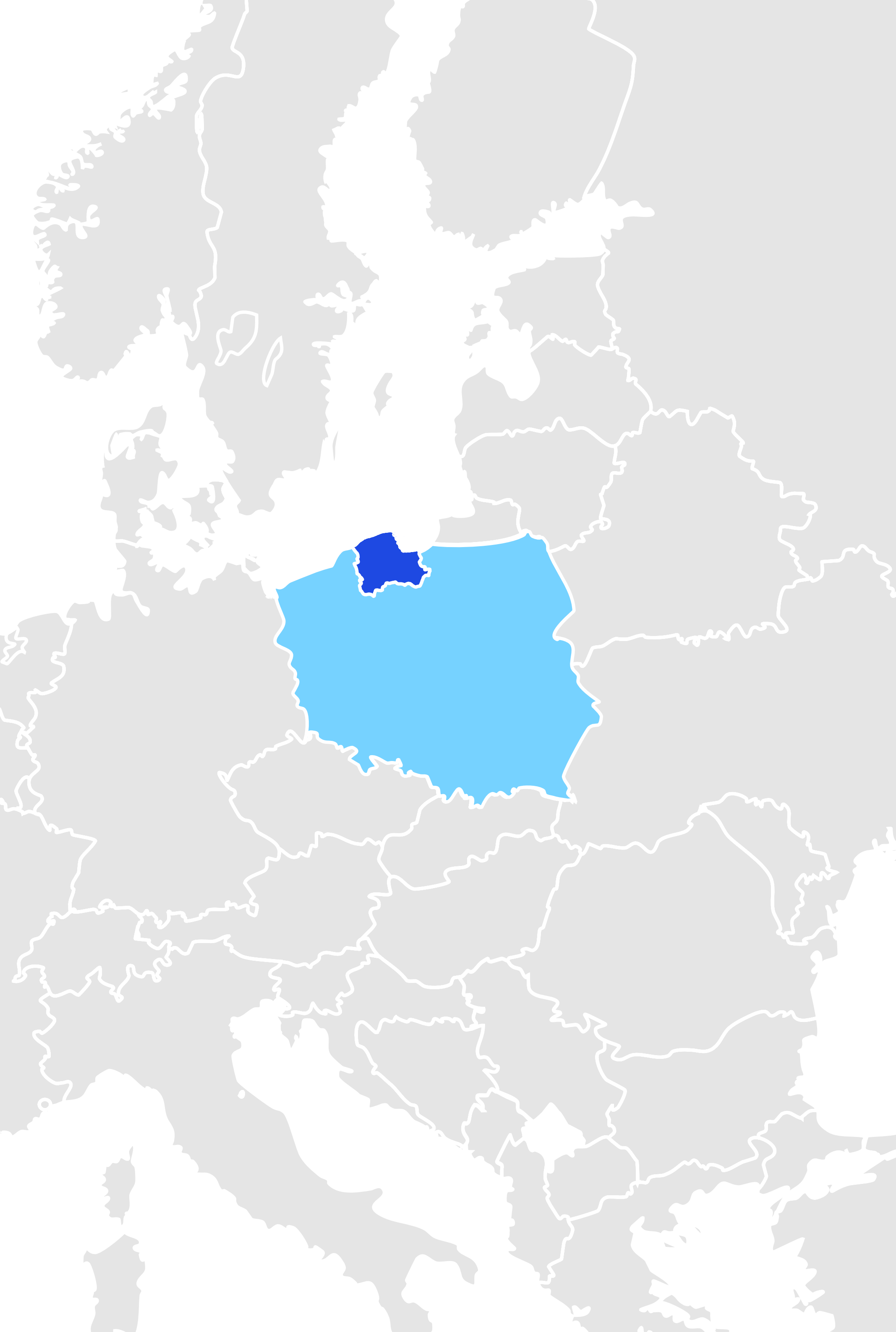
This report examines the Tricity's position as a matured and prominent hub for the Global Business Services sector, set within the broader investment landscape of the Pomeranian Voivodeship. It assesses the structural foundations for the region's GBS requirements – from talent pool through the logistic infrastructure up to the local investment opportunities that differentiate the Tricity from competing Polish locations. Taken together, these foundations present a picture of a region that has moved well beyond the early-stage growth phase of its business services journey and is now navigating into the more demanding, and ultimately more rewarding waters of market maturity.

Pomerania
economic overview

21.3% **GDP growth YoY (2022)**

2.4 m **inhabitants**

3rd **Mid-Sized European Region of the Future 2024/25 – FDI Strategy**



Source: Statistics Poland, fDi's Mid-Sized European Region of the Future 2024/25.

Destination: Pomerania

Over the past decade, the Tricity has cemented its position as a strategic hub for modern business services, attracting global players while steadily maintaining impressive growth rate. With the combination of academic excellence, infrastructure development, high quality of life, and a business environment, the region continues to attract the attention of investors. Nowadays, the Tricity area stands for one of the vital points of the Polish GBS map, right next to hotspots such as Warsaw, Cracow and Wroclaw. The area is home to more than 230 BSS centers split across four main pillars of Pomerania Business Services – IT, BPO, SSC and R&D.

The year 2025 was yet another in which the total number of centers had increased, underlining the strong growth trend, present in the area for multiple years.

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Human Resources & Education

The steady availability of human resources and an educated workforce is by far the most crucial element when analyzing the economic potential of Business Services Sector destinations. Alongside Cracow, Warsaw, and Wroclaw, the Tricity is an important hub for the SSC/BPO industry in Poland, employing over 42,000 residents across more than 230 service centers.

The average number of jobs in GBS centers (SSC/BPO/CoE) exceeds 190 full-time equivalents (FTE), with approximately 68 GBS centers in total. IT and R&D centers account for approximately 70% of all Tricity service centers, with the average size of this type of center standing at around 85 FTE. Despite market fluctuations and isolated signs of declining employment, the Tricity BSS sector remains on a growth trajectory and continues to attract new investments, although the pace of growth has moderated. 2025 was yet another year that noted an increase in the number of newly established centers. Year to year changes are visibly slowing down, entering now single-digit values (in comparison to steady double digits in the previous years), the continuous growth trend highlights both the economic stability and the considerable investment potential of the Pomeranian region's business services sector.

As is the case across the entire Polish market, companies are looking for increasingly effective ways to utilize Tricity personnel for increasingly advanced processes, driven by the need for upskilling and more effective management of rising employment costs. It is difficult to draw a clear distinction between Gdansk and Gdynia, as in most comparative analyses with other cities the Tricity is evaluated as a whole.

A prime indicator of the region's educational potential is its significant student population of approximately 92,000, with around 20,000 graduates entering the labor market annually from 34 educational institutions

Education

92 k
Active Students

20 k
Graduates in 2024/25 Academic Year

34
Higher Education Institutions

Approx 4% of students are from abroad. Pomerania is the biggest Academic Center in Northern Poland with universities located in 7 cities.

Gdansk University of Technology is one of only nine Polish institutions included in the prestigious Shanhai ranking.

across Pomerania. The most important universities in the Tricity include the University of Gdansk, Gdansk University of Technology, and Gdansk Medical University (all of these are members of the FarU university association) – as well as the Maritime University and Naval Academy in Gdynia, the private WSB Merito University with campuses in both Gdansk and Gdynia, and a number of smaller public and private institutions. Gdansk stands out for its richer and more diverse academic offering – spanning university, technical, medical, economics, and language programs – which translates into greater talent potential in the areas of finance (F&A), HR, business process services, and IT, particularly owing to its strong base of IT graduates. Gdynia represents a smaller but more specialized academic center, with technical, maritime, and engineering programs developed at its academies. For the SSC/BPO sector, this means reliable access to specialists in logistics, engineering, and industrial systems.

The BSS market in the Tricity, comprising 230 centers and 42,000 FTES, is firmly in the maturity phase. Initially, the market was dominated by professionals under 30, whereas the trend has since shifted towards those aged 35 and above. Women predominate in the BSS sector (approximately 58%), while men predominate in IT (approximately 85%). Demand is shifting from transactional (junior) to strategic and analytical (mid- and senior-level) roles, driven by automation, and there has been a noticeable increase in employer interest in IT skills related to the implementation and operation of business platforms. This reflects the broader technological transformation that organizations are undergoing in response to the rapid development of artificial intelligence.

At the same time, employer needs in the areas of digital marketing and computer graphics are also undergoing a transformation. There is a clear trend towards companies seeking employees who can use new technologies efficiently and innovatively, and work effectively with artificial intelligence – this is occurring at the expense of demand for specialists with more traditional skill sets. Over the past two years, the Tricity, like the rest of the country, has seen growing demand for skills related to the implementation and operation of business platforms, as well as for specialists who can effectively leverage artificial intelligence. The importance of advanced processes is also growing, and with it the demand for more mature, expert-level skills. It should be noted that companies are becoming more cautious about expanding their teams, which is in turn reflected in the smaller number of new investments; this dynamic is consistent with the broader market slowdown observed across Poland. The shortage of qualified candidates, particularly for specialist and managerial positions, is a nationwide challenge that is equally felt in the Tricity. Candidates hold increasingly high expectations, and the widespread availability of remote and hybrid work means that the Tricity competes for talent not only with other Polish cities, but in some cases with employers abroad. Despite this, employee turnover remains relatively low, which is indicative of the stability of the local labor market. The Tricity continues to stand out as an attractive destination for foreign investors, supported by a substantial talent pool cultivated through its strong university base.

It is worth noting, that compared to previous record years, the BSS market grew at a somewhat slower pace in the most recent period. Given the numerous economic challenges and the complex international environment, many companies adopted a cautious, wait-and-see approach, which translated into more moderate recruitment activity and less dynamic wage growth. Average salaries in the Pomeranian region remain above the national average, meaning that a typical employee in Pomerania earns somewhat more than the national counterpart – a favorable economic dynamic that is further reflected in the region's low unemployment rate, which stood at just 4.6% in May of 2025.

A promising indicator of future growth is the increasing number of positions requiring high-level skills. In an era of widespread automation of less advanced processes, this signals both market maturity and the continued development of a highly skilled workforce – further evidence of the advancing sophistication of the modern business services sector in the region.

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A-class office spaces in Tricity

Source: Invest in Pomerania.

Real Estate

An important consideration for the BSS sector is the office real estate market in the Tricity, which already exceeds 1.067 million m², placing the agglomeration firmly among Polish markets with over one million square meters of leasable space. This volume is itself a meaningful indicator of the region's maturity – it signals that the Tricity is an established location with a well-developed office rental culture and a strong foundation for business cooperation in the field of business-related services. Office stock is continuously expanding, with a further 37,000 m² currently under construction. The vacancy rate stands at a healthy 12.5% – five percentage points below the national average – leaving sufficient availability to accommodate new investment projects. In the upcoming months, the issue of so-called "hidden vacancy" – space not actively used by current tenants, which is awaiting subletting or return to the developer – is also expected to be resolved. This phenomenon emerged during the turbulent period of hybrid work model adoption and center restructuring, and according to market experts may account for an additional 5–6% of total Tricity office stock.

The infrastructure and office market environment, much like the human resources landscape, is crucial to a comprehensive assessment of the state of the BSS sector in the Tricity. It is impossible to evaluate the opportunities available to service centres without considering the real estate potential of the area under analysis. The challenges associated with a shortage of Class A office space in the Tricity – still a pressing concern as recently as a decade ago – have now been resolved, and with over 1.067 million m² of available space, the market has reached a healthy level of maturity, one that is increasingly recognised in global real estate reports.

Moreover, the total volume of such office space frequently surpasses traditional locations in Western countries in terms of both scale and quality – a consequence of the modern construction standards applied to office development in the region and, by extension, the use of the latest trends in fit–out and furnishing specifications. In recent periods, however, an observable downward trend in the new supply of office space has emerged.

With demand remaining at elevated levels, the Tricity has experienced a fall of supply, which resulted in no new office locations were delivere to the market over the past year. It is worth noting that this trend is expected to reverse in the coming years, given the volume of projects currently under construction. A contraction in the pipeline under construction has nonetheless been recorded; at the end of 2024, space under active construction stood at 56,100 m², declining to 40,700 m² by mid-2025. New supply delivered in 2025 amounted to only 4,600 m² – approx. four times less than in the preceding year. Looking ahead, new supply under construction is estimated to reach 27,100 m² in 2026, with a further 9,000 m² projected for 2027.

Space delivered over the next three years will be concentrated primarily in Gdansk, in districts including Śródmieście, Wrzeszcz, and Lotnisko/Matarnia. In terms of the share of new transactions within total transaction volume, a broadly similar level – with a slight decrease – was recorded in H1 2025 compared to the end of 2024, alongside a generally lower level of demand throughout 2025. The share of owner-occupier transactions also declined by one percentage point, reaching 5% in H1 2025. No expansion transactions were recorded in this half-year period, representing a decrease to 0% compared to 3% at the end of 2024. Notably, the average transaction size increased by approximately 20% to 1,210 m², relative to the previously analysed period.

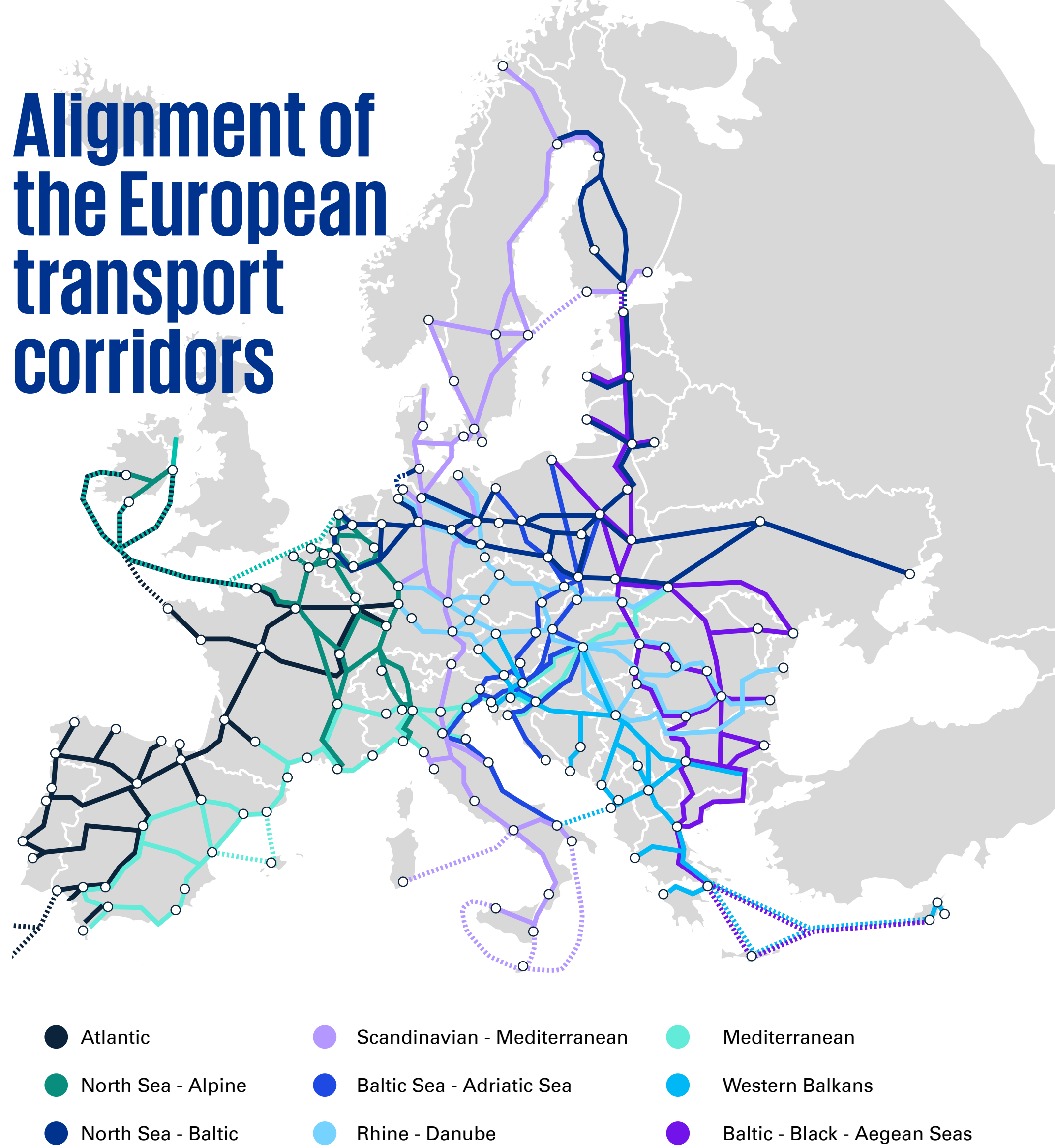
Across the Tricity, vacancy rates in 2025 have recorded a 0.2 percentage point year to year increase compared to the end of 2024. Gdansk represents an exception, as the vacancy rate in the city decreased by 0.3 percentage points to 9.2%, while Gdynia recorded a significant increase of 1.8 percentage points, reaching 23.6%. Average rents saw a moderate increase of approximately 3.3% year-on-year, while prime rents rose by 5% to € 15.75/m²/month. The trends outlined above in the Tricity office market allow for several conclusions to be drawn. First, the volume of office space under construction this year is lower than in previous years. Total leased space in the Tricity has reached 932,000 m² – slightly below the one million square meters threshold. In the coming years, this threshold is expected to be surpassed not only in terms of total available space, but also in terms of leased space.

Location and Transport Infrastructure

The Pomerania's biggest metropolitan area, Tricity, is unique on the nationwide scale. Comprising of two large cities – Gdansk and Gdynia – with a smaller Sopot in between them, this urban region is inhabited by over 1.6 milion people, which makes up for more than 60% of the whole voivodeship population. This places Tricity as the third largest metropolitan area in Poland, yielding only to the capital city, Warsaw, and the Upper Silesian urban area. The key factor is the strategic location of the area, as it's the only large urban area located by the Baltic Sea In Poland, thus making it by far the most important maritime location in the whole country. Due to its strategic placements, the region is a part of the Trans-European Transport Network (TEN-T), which designates it as a vital node within the broader European infrastructure framework.

Two of the network's core corridors intersect in the area: the Baltic-Adriatic Corridor, which stretches from the Baltic ports southward through Poland, Austria, and Slovenia to the Adriatic Sea – and the North Sea – Baltic Corridor, linking the region westward toward Germany and the Benelux countries. This positioning means that goods flowing between Scandinavia, the Baltic States, Poland, and the wider European continent naturally pass through the Tricity, reinforcing its function as an critical logistics hub on a continental scale.

Alignment of the European transport corridors



Source: https://aire.aero/adoption-of-the-trans-european-transport-network-ten-t/

Gateway to Europe

Tricity: Gdynia – Sopot – Gdansk

The biggest agglomeration north of Warsaw **(1.6 m residents)**

Loggistic Triangle – Lech Walesa Airport, Seaport in Gdansk and Gdynia.

Summer destination – over **4 mln tourists** visiting in 2024

Source: Invest in Pomerania.

The Tricity's air gateway, Gdansk Lech Walesa Airport, has in recent years established itself as one of the most dynamically growing airports in Central Europe. In 2025, the airport handled 7,393,016 passengers – its highest annual total in history and a year-on-year increase of more than 10% – cementing its position as the third busiest airport in Poland, behind Warsaw Chopin and Cracow John Paul II International. Such trajectory confirms direct implications for the region's attractiveness both to international investors and the tourism sector, constantly attracted by the Tricity historical and cultural heritage. On top of that, Gdansk

Air connectivity

5th

Place in the Global Airport Ranking

(Air Help 2019)

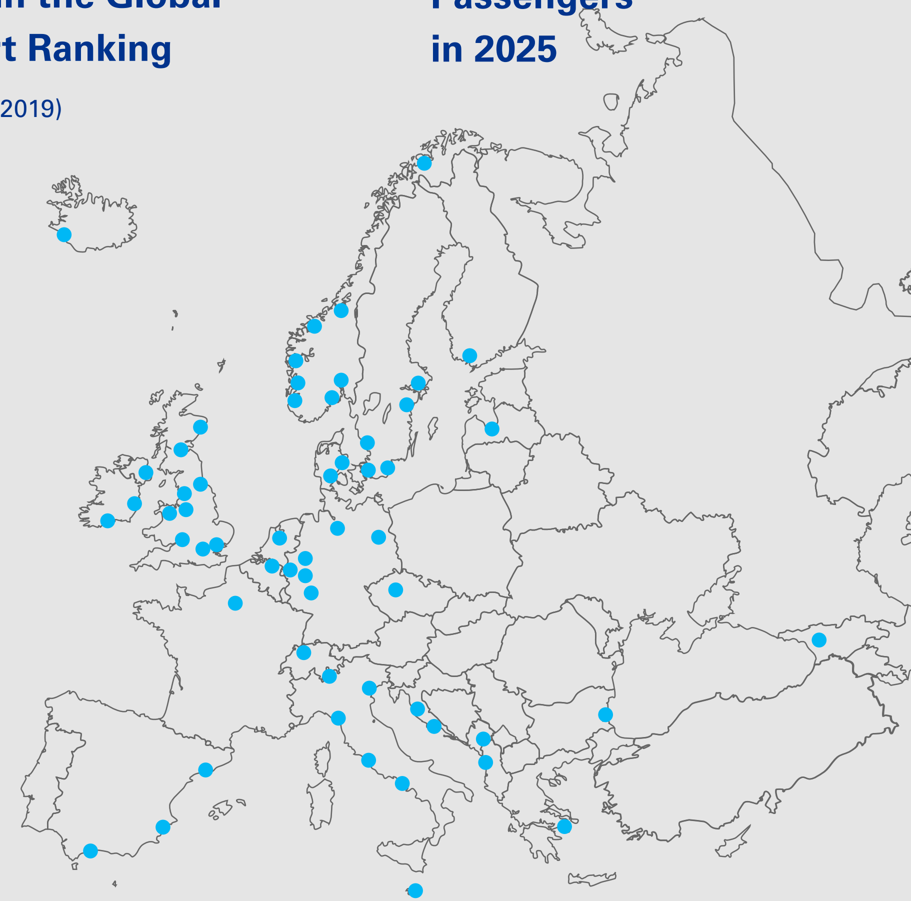
77

Non-stop flight destinantions

(24 countries worldwide)

7.4 mln

Passengers in 2025



Source: Invest in Pomerania.

Airport offers the best connectivity to the Nordic countries compared to all other airports in Poland as Oslo and Copenhagen rank as the second and third most popular destinations, with 486,000 and 428,000 passengers, respectively.[1]

Maritime Infrastructure

The Port of Gdansk stands as one of the most important gateways into the Baltic Sea region. As the largest port in Poland by cargo volume, it was consistently ranked among the top ports in the Baltics, handling tens of millions tons of cargo each year. Its rise to regional significance has been driven by the expansion of the deepwater container terminal which granted it the ability to accommodate the largest container vessels. This made it the only terminal of its kind on the Baltic Sea capable of receiving such vessels directly from the open ocean without draft restrictions. Such investment has given Gdansk a decisive competitive advantage over rival ports in the region, positioning it as the preferred trans-oceanic hub for cargo destined for markets located in Poland, Baltic States and the central Europe.

The Port of Gdynia plays a strategic role within the Tricity port complex, offering a well-developed infrastructure tailored to a broader cargo mix that includes bulk goods, general cargo, freight, and ferry passenger services. In 2024, the port served 3,559 commercial seagoing vessels and handled 77.4 million tons of cargo, generating a record net profit estimated at around PLN 264 million – a 24% improvement on the previous year.

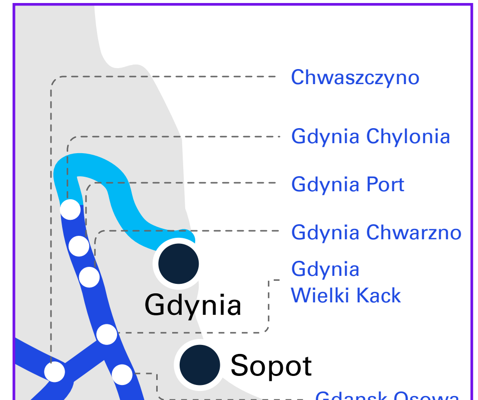
The cargo mix in 2024 was led by liquid fuels at nearly 40 million tons, representing 51% of total mix, followed by general cargo at 30.2%, coal at 10.2%, and grain at 3.7%. The high share of liquid fuels in the cargo mix reflects a broader geopolitical shift – the reconfiguration of European energy supply chains following Russia's invasion of Ukraine. The conflict has increased the importance of Gdansk's Naftoport terminal to a position of national significance. The terminal alone accounts for over 50% of total cargo handling at the port, supplying national refineries while also handling transit flows to Central European countries. Its expansion underlines the strategic importance placed on securing energy logistics through the Tricity gateway.

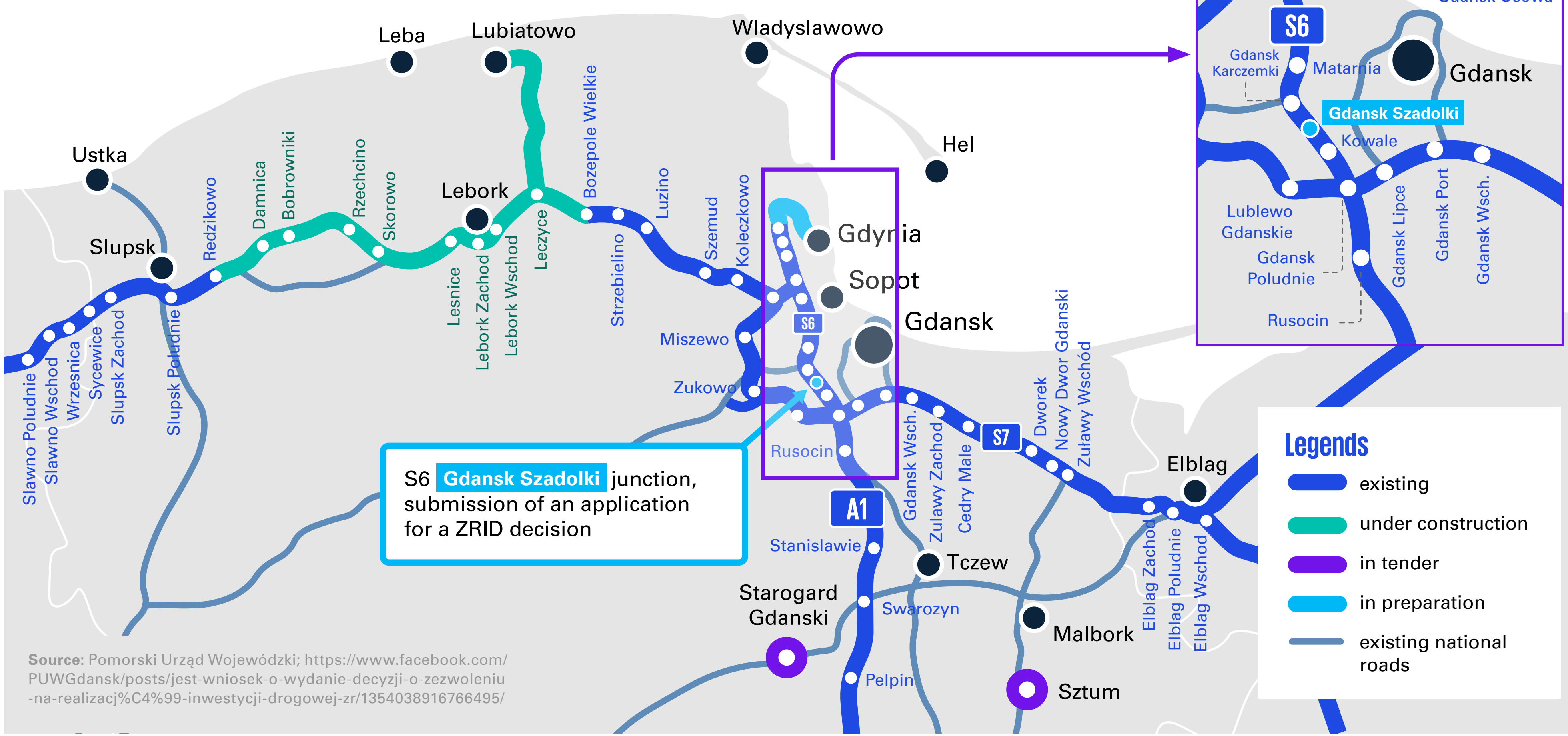
As the two ports are rather complementary than competitive, they together form a dual-port system that can absorb a full spectrum of maritime traffic. In the recent years, Gdynia has been investing in modernizing its quay infrastructure and expanding its handling capacity, ensuring it remains a relevant node in the regional logistics network. The presence of two major ports within the same metropolitan area is a rare geographic advantage that amplifies the Tricity's resilience and attractiveness as a logistics destination.

1 https://www.airport.gdansk.pl/en/news/nearly-7-4-million-passengers-in-2025

Road Infrastructure

The backbone of the Tricity's overland connectivity is the A1 motorway, a north-south artery running 566.6 km from Gdansk through Lodz up to the Polish-Czech border at Gorzyczki, where it connects with the Czech D1 motorway. For the Tricity, the Amber Highway is the primary corridor through which the output of one of Europe's busiest port complexes is distributed across Poland and into Central Europe. Complementing the A1 along the coastal axis, the S6 expressway provides the Tricity's with the direct westward connection, all the way until Szczecin and the German border. The S6's most important section in the region context is the Tricity ring road, running 38.6 kilometres from Gdynia to Pruszcz Gdanski, and serves as a bypass of the agglomeration, diverting transit traffic away from city centres. The expressway also provides a direct connection between

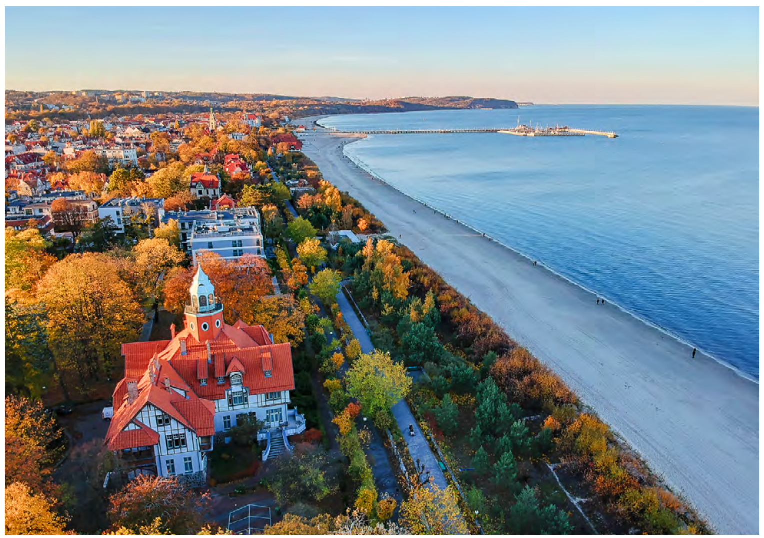




Source: Pomorski Urząd Wojewódzki; https://www.facebook.com/PUWGdansk/posts/jest-wniosek-o-wydanie-decyzji-o-zezwoleniu-na-realizacj%C4%99-inwestycji-drogowej-zr/1354038916766495/

the Port of Gdynia and the national highway network. As of 2025, the S6 construction has entered its final phase, with the full completion of the Szczecin-to-Gdansk corridor scheduled for the Q2 2026, which will create an unbroken expressway connection along the entire Polish Baltic coast for the first time in history.

The next generational upgrade to the Tricity's ring road system was just finalized in 2025, in the form of the Tricity Metropolitan Ring Road (OMT – Obwodnica Metropolii Trójmiejskiej). A new outer bypass of the agglomeration has relievedthe heavily saturated inner ring and restored long-distance transit capacity along the S6 corridor. The OMT bypasses the Tricity agglomeration from the south and west, connecting the S7 Southern Bypass of Gdansk, the A1 motorway, and the S6 Kashubian Route. The investment addressed a well-documented problem: the existing inner ring road has long been operating at or beyond its design capacity, with freight and transit volumes having expanded dramatically since the route was first conceived.



Running southward from the Tricity, the S7 expressway provides the region's most direct overland link to the Polish capital. The S7 is planned to run 720 kilometers in total – from Gdynia through Gdansk, Warsaw, Radom, Kielce, and Cracow – up to Rabka near the Slovak border. With more than 660 kilometers already built as of early 2026, the S7 strategic character as a main north--south road provides means of an essentially unbroken high-standard road connection from the Tricity waterfront all the way to the southern Polish border. Taken together, the convergence of the A1, S6, and S7 and their interchange nodes, makes the Tricity one of the best-connected road junctions in Poland, concentrating three major national axes at a single point and providing seamless onward routing in every direction. This infrastructure density is not accidental as it reflects decades of targeted investment driven by the ports' economic and strategic value.

The ongoing completion of the OMT outer ring, the full opening of the coastal S6 corridor, and the finalization of the S7 spine will collectively mark the Tricity's road network reaching a level of completeness and capacity that will support the next generation of the region development preventing any bottlenecks that have historically constrained the agglomeration's full logistical potential.

Rail Connections

The Tricity's integration into Poland's national rail network is anchored by the PKP Intercity long-distance service on the Warsaw–Gdynia corridor, one of the most heavily used intercity rail routes in the country. The Warsaw–Gdansk route is served by the flagship Express InterCity Premium Pendolino, with the fastest scheduled journey time standing at approximately 2 hours and 25 minutes as of early 2026. Recent track reconstruction have brought the line to ETCS Level 1 standards, with average commercial speeds in the range of 170–180 km/h on the upgraded sections.

Tricity is also directly connected by PKP Intercity services to Cracow, Katowice, Wroclaw, Poznan, and a range of secondary cities, placing it within a single-train reach of essentially every major Polish urban center. Across the region PKP Intercity operates around 350 trains daily and reported an 18.2% market share of total national passengers served in 2023.The ongoing fleet modernization program signed in 2024 includes a PLN 4.2 billion contract for the delivery of 300 new carriages capable of 200 km/h, with delivery expected by 2028 will further elevate service quality on the routes serving the Tricity.

Functioning throughout the tricity area, the crown jewel of the urban railways the Fast Urban Railway (SKM) – serves as the backbone of quick mobility. The SKM operates 27 stops along a single continuous coastal corridor linking Gdansk, Sopot, Gdynia, and extending further to Wejherowo and Lebork, 59 kilometers west of Gdynia. Entire Tricity route covers approximately 30 kilometers and takes around 35 minutes, comparable to car travel time but significantly faster during peak hours than the car counterpart. In 2023, nearly 45 million passengers used the SKM which benchmarks how crucial is the railway for everyday mobility, and how substantial its scope is for de-trafficking the agglomeration. Over 90% of SKM stops are connected with other public transport , and timetables at major stops synchronized to minimize the wait times.

Complementing the SKM, the Pomeranian Metropolitan Railway (PKM) adds a secondary rail axis to the network. This additional system addresses the primary gap in the SKM's coverage: direct rail access to Gdansk Lech Walesa Airport and the southern and western districts of the agglomeration. The PKM operates four rail lines, connecting the airport directly into both Gdansk and Gdynia city centers.

Airport connection, in particular, is an important addition to the regional transport system – one that has progressively shifted the modal balance of airport access away from private cars and taxis, reducing both traffic congestion and carbon emissions from surface travel.

Plans for a further extension – PKM Poludnie – were formalized with a construction contract awarded in June 2024, covering a new 7.5-kilometre route, with an estimated investment cost of 2.3 billion of PLN.

Economic Potential and Investment Attractiveness

The Pomeranian Voivodeship and its Tricity core represent one of the most structurally compelling investment destinations in Central and Eastern Europe. The region whose economic profile is distinguished by the mutually reinforced pillars provides an attractive mix of resilience and growth potential. At the macroeconomic level, the Pomeranian Voivodeship occupies a firmly established position among Poland's most productive regions, being placed as the 6th biggest voivodeship in terms of nominal GDP.[2] At the same time, Tricity area itself is ranked on the 5th place across other similar urban areas in Poland, in terms of nominal GDP.[3]

The economic landscape of the Tricity is best understood through four interlocking pillars compounding reinforcing strategic advantages of the city. The first of them is maritime and logistics, rooted in the dual-port complex of Gdansk and Gdynia that together command nearly three--quarters of Poland's total seaborne cargo and are now undergoing the most significant capacity expansion in their modern history. The second is technology and advanced business services, built around one of the deepest pools of engineering and digital talent outside Warsaw, anchored by global corporate campuses and increasingly oriented toward high-complexity R&D. The third is advanced manufacturing and maritime industry offering offshore technology cluster that is among the most technically specialized in the Baltic region. The fourth, and in terms of near-term capital mobilization the most dynamic, is offshore wind energy – a sector in which the Polish Baltic zone has emerged as one of Europe's most active development pipelines, standing as operational and supply chain base.

Business Services & Technology

In the past decade, Tricity has established itself as Poland's second most important technology cluster after Warsaw. The region position was built on a trifecta of engineering talent, corporate investments, and a quality of life that continues to attract and retain skilled professionals at scale. The region accounts for

approximately 11% of Poland's total IT and digital talent pool, with the Tricity collectively employing over 45,000 IT and digital specialists – of which almost 30,000 works in the BSS sector alone.

This talent base has evolved significantly over time, moving well beyond the back-office and support functions that first attracted multinationals to the region in the 1990s. Global centers in the area now leverage high-end digital talent in areas including AI and machine learning, data science, big data analytics, cloud computing, IOT, and cybersecurity. Such profile that positions the Tricity as a credible location for R&D operations rather than simple shared services delivery.

The corporate anchor of the Tricity's technology ecosystem is Intel, whose Gdansk campus represents the company's largest research and development centre in the European Union. The site employs more than 2,000 people and has been expanded with a sixth building dedicated to artificial intelligence, machine learning, and autonomous vehicle development. A second R&D anchor Amazon – operates a significant development centre in Gdansk focused on cloud infrastructure and voice technology. It's worth mentioning that the Tricity's Amazon roots run deep; the origins of their operations can be traced to text-to-speech company IVONA, creator of the voice behind Amazon Echo (Alexa), which have been acquired by Amazon and now forms the nucleus of its engineering presence.

Beyond these two flagships, the ecosystem encompasses a full spectrum of operators ranging from financial services (PwC, Nordea), technology (Nike, Lufthansa Systems), enterprise software (SII, EPAM), digital marketing (GetResponse), and AI-driven analytics (SentiOne). The Tricity is particularly strong in cloud technologies and embedded systems, with the Gdansk Science and Technology Park and the Pomeranian Special Economic Zone hosting a number of smaller firms and startups alongside these larger anchors. The infrastructure supporting the tech sector has scaled in parallel with corporate demand.

The Tricity's total floor space occupied by business service centres has exceeded one million square metres, making it the fourth largest metropolitan area in Poland for modern business services, behind Warsaw, Cracow, and Wroclaw.

The Olivia Business Centre in Gdansk – the largest office complex in northern Poland – serves as the de facto headquarters of the region's corporate technology community, hosting Scania, Wartsila, Capgemini, Amazon, EPAM, SII, and others within a single campus that integrates office, conferencing, and retail functions.

Pomerania is also positioning itself as an emerging semiconductor hub, with 500 hectares of fully serviced land secured in Pruszcz Gdanski for large-scale high-tech investment.

Proof of the region development in this area is a signed memorandum of understanding between Pomerania and Taiwanese partners, which opens pathways for cooperation in the semiconductor field. This marks a strategic turning point designed to capture a share of the European Chips Act investment wave.

2 https://ec.europa.eu/eurostat/databrowser/view/tgs00003/default/table?lang=en

3 https://ec.europa.eu/eurostat/databrowser/view/met_10r_3gdp__custom_15346960/default/table?lang=en

Manufacturing

The Tricity's manufacturing base is rooted in the region's shipbuilding heritage – which has evolved from its origins in large-scale vessel production into a cluster of precision engineering and maritime services. The historical shipyards of Gdansk and Gdynia have been substantially repurposed and upgraded since the industrial transitions of the 1990s, but the workforce skills have been preserved and redirected toward higher-value processes. The CRIST Shipyard in Gdynia is a prime example of this trajectory, having repositioned itself as a specialist builder of complex offshore construction vessels, and a major asset in large European infrastructure projects. This kind of high-specification, low-volume manufacturing is precisely the segment which provides the region with key strategic advantage.

The institutional infrastructure supporting this sector has been deliberately restructured to facilitate the transition from traditional heavy industry to technology-intensive maritime manufacturing. The Baltic Port of New Technologies (BPNT) in Gdynia, established in 2012 on the grounds of the former Gdynia Shipyard, was built to support companies from the shipbuilding, offshore, logistics, and maritime sectors within a modernized industrial campus. The BPNT has become a focal point for the region's offshore wind supply chain ambitions, attracting specialist service companies to establish their operations.

Offshore Wind Energy

Of all the investment sectors currently active in Pomerania, offshore wind energy represents the most significant opportunity over the next decade. Importance for the region resides both in terms of the direct capital being deployed and the downstream industrial and supply chain activity it will generate. Poland's Baltic coastline sits within one of Europe's most resource-rich wind zones, and the country's policies have provided the offshore sector with the clarity and certainty, needed to unlock large--scale private investment. Poland has set a national target of 6,000 MW of offshore wind capacity by 2030, a figure that represents a huge shift to the country's energy mix. On the other hand, such goal places enormous demand on the port infrastructure, installation vessels, supply chain capacity, and operations and maintenance networks concentrated in the Tricity region.

The most advanced project currently under construction is the Baltic Power offshore wind farm – a EUR 4.73 billion joint venture between ORLEN Group and Northland Power. The offshore farm will feature 76 turbines of 15 MW each, located 23 kilometers north of the coastline near Leba, with a total installed capacity of up to 1,200 MW and commissioning planned for 2026. Poland's first dedicated offshore wind operations and maintenance base, opened in Leba in early 2025 and spanning approximately 1.1 hectares, will support the Baltic Power farm for its entire projected lifecycle of approximately 30 years. The Baltic Power offshore wind farm is projected to account for 3% of the total national energy demand, which will help to decrease the carbon emissions and generate millions in savings. Such investment is also a viable asset that will anchor long-term employment for specialists across the coastal zone of the Pomeranian Voivodeship.

Investment Zones & Local Initiatives

The investment incentive landscape of the Pomeranian Voivodeship is structured around two complementary institutional frameworks – the Pomeranian Special Economic Zone (PSEZ) and the Slupsk Special Economic Zone (SSEZ). Both zones provide comprehensive coverage across the entire voivodeship, offering foreign investors a professionally managed system of financial incentives, site services, and business support that compares favorably with any equivalent framework in Central and Eastern Europe. Understanding how these instruments operate is a practical prerequisite for any investor conducting a serious site evaluation in the region, as the incentive framework can materially alter the financial profile of an investment and the timeline to operational readiness.

The Pomeranian Special Economic Zone is the major investment zone manager in Poland. Established in 2001 and operating across 226 municipalities spanning the Pomeranian, Kuyavian-Pomeranian, and parts of the West Pomeranian and Wielkopolskie voivodeships, it functions as one of 14 regional entities responsible for comprehensive investor services under the Polish Investment Zone framework. The zone contains nineteen sub-zones with a combined area of approximately 1,240 hectares, strategically positioned along the A1 motorway corridor and in direct proximity to the seaports of Gdansk and Gdynia, and Lech Walesa Airport. The concentration of industrial land at locations where port, road, and rail infrastructure converge is a deliberate feature of the development strategy which further boosts the impressive infrastructure solutions present in the region.

The main financial incentive offered by the PSEZ is a corporate income tax exemption of up to 15 years, structured under the Polish Investment Zone framework and tuned to the characteristics of the investing company or the specifics of the project. Aid for the companies is provided in the form of the proportion of eligible capital costs that can be offset through the tax exemption. In PSEZ it is set at 35% for large enterprises, 45% for medium-sized enterprises, and 55% for small enterprises. The tiered structure ensures smaller investors are not disadvantaged relative to large multinationals. The tax relief is available across the entire country regardless of whether the investment site is publicly or privately owned, provided the investor meets the relevant quantitative and qualitative eligibility criteria. Support decisions are issued for a set period, specifying the permitted scope of economic activity and the conditions that must be maintained to preserve eligibility.

Invest in Pomerania

Pomerania region vibrant economic landscape is also highlighted by a number of local investment incentives and initiatives such as Invest in Pomerania. The organization is major regional non-profit initiative coordinated by the Pomeranian Development Agency that supports foreign direct investment projects across the voivodeship, and is the institution through which the vast majority of foreign investors first engage with the region. The initiative was established in 2011 as a consolidation of previously fragmented investor support functions across the region, bringing investor focused activities under a single coordinated brand. Since its establishment, Invest in Pomerania has attracted over 232 investment projects, leading to the creation of more than 26,500 jobs.

Invest in Pomerania

15 years of FDi attraction

232
Investments projects completed

1,806
Investment inquiries handled

26,820
New workplaces generated

The initiative has also organized 589 investor visits and handled approximately 1,806 investor inquiries, boasting impressive investor roster including companies such as Amazon, Bayer, Swarovski, State Street, PwC FCU, Scania, Wartsila, DNV, SK Hynix and HapagLloyd. The service offer spans from initial site selection to post-establishment support with the aim of assisting investors through expansion decisions, and talent acquisition challenges after initial operations have commenced.

The reflection of the Pomeranian dynamic landscape can be found in the number of business initiatives and events regularly taking place throughout the region.

WENTYL_HR – FOR THE HR SECTOR
Wentyl_HR is a regular event aimed at HR specialists and people interested in human resource management. During the meetings, participants have the opportunity to exchange experiences, discuss the latest trends, and establish professional contacts. The event includes panel discussions, workshops, and lectures on current topics such as employee retraining, neurodiversity in the workplace, and the challenges of hiring foreign workers.

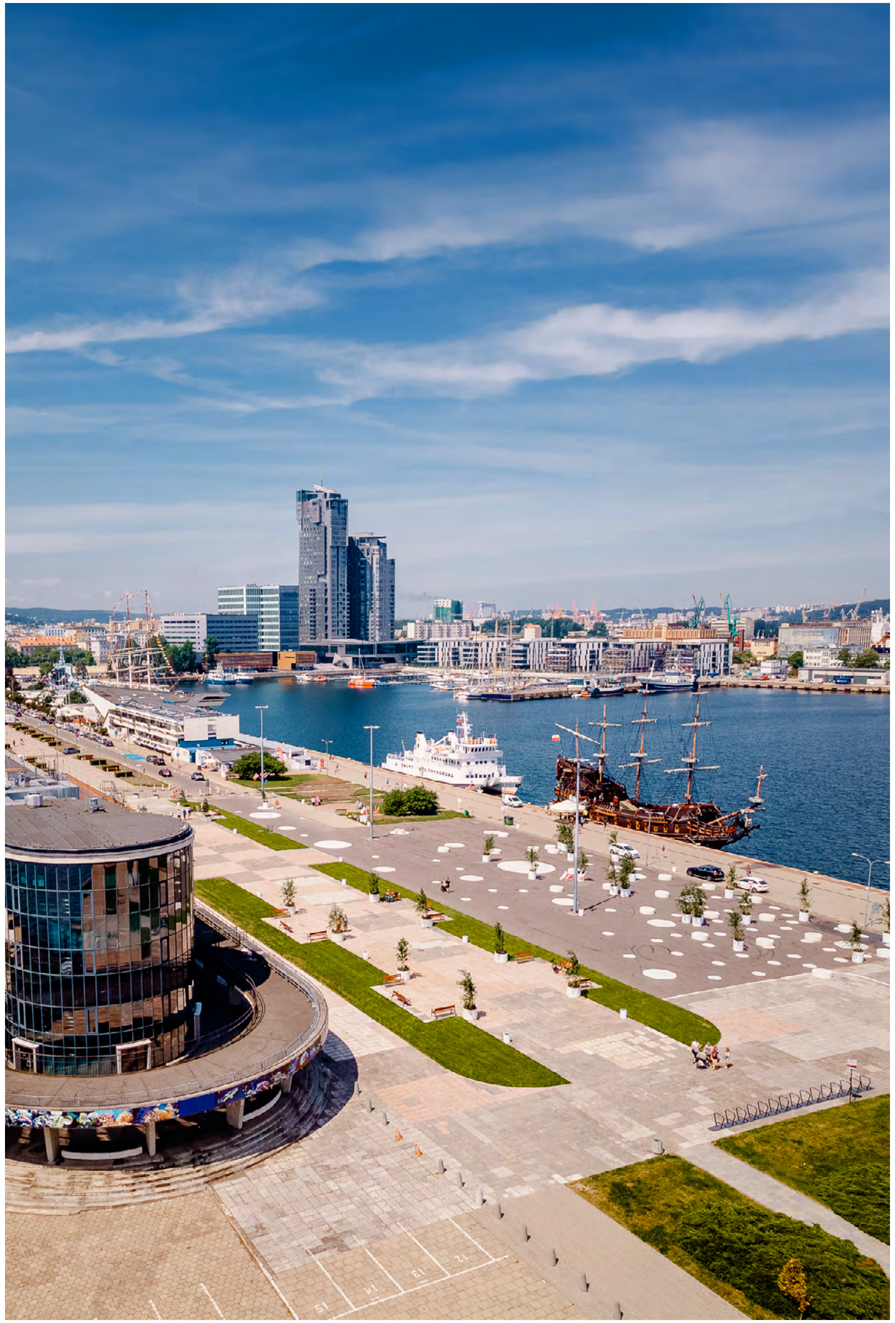
3CITY IT CLUB – FOR THE IT SECTOR
Tricity IT Club is an exclusive quarterly event, available only to senior managers from the local IT industry, including both IT departments in shared services centres/GBS and ITO companies. The programme includes investment news from Invest in Pomerania, followed by a presentation by the host on its history, local activities, and current operations. After the official part, guests participate in a networking session where they can exchange insights on current challenges, best practices, and the state of the IT market at the local, national, and global levels.

PROVIDERS MEETING – FOR BSS SUPPLIERS
The Providers Meeting is a regular event for suppliers of various business services, ranging from real estate and conference space rental to recruitment and legal services. Its purpose is to facilitate the exchange of information and best practices, and to foster discussion of current industry challenges. The meeting serves as a platform for cooperation and innovation, helping service providers to establish contacts, adapt to changing customer needs, and remain competitive in the market.

OUR LOCAL EVENTS – Infoshare
"We believe that technology is changing the world and every aspect of our lives. We promote it in the hope that it will inspire people to embrace it and create their own innovations. We also create networking opportunities. We connect people, startups, and companies to help them grow together. We build a trustworthy and caring community for people interested in technology. We simply share what is valuable!"

FOLLOW THE LEADERS
"Follow the Leaders is a unique business event organised by Pro Progressio. It consists of two conferences, workshops for team leaders, executive meetings, and a special gala with the PRO Tiger competition finals."

IT Manager of Tomorrow
"The biggest event for IT leaders in Europe. The AI revolution, modern leadership, technology trends, skills of the future – and the power of a real community. IT Manager of Tomorrow 2025 is a unique event that allows participants to learn about the latest trends, gain practical skills, and network with IT leaders from around the world."



Quality of Life

The Baltic region is shifting from maritime hub to one of the most dynamic European economic engines powered by the synergy between academic institutions and ambitious infrastructure projects. Pomeranian region is emerging as an excellent choice for those seeking professional and personal development, quality of nature, clean air, and rich cultural offer. The region's success is the direct outcome of years of strategic development. This trajectory was solidified in 2017 when Pomerania was ranked 4th on the Milken Institute's index of the Best-Performing Cities in Europe, rubbing shoulders with global giants like London, Stockholm, and Budapest.

This economic surge is complemented by great quality of life. TripAdvisor named it the No. 1 Destination on the Rise in Europe and 5th globally that same year. Frequent citation in the Social Diagnosis for having the highest number of happy residents in Poland make the region distinctive on a national scale. The character of its urban centers allows talent to choose an environment that fits their specific lifestyle. The Pomeranian Voivodeship consistently secures the top position in national quality-of-life rankings, backed by impressive satisfaction metrics. Tricity region is widely recognized as one of Europe's most attractive places to live and work because of their exceptional geographic setting. Natural beauty is complemented by urban infrastructure, featuring efficient healthcare, a well-organized public transit network, and a wide range of modern housing options. Recent data indicates that 73.7% of the regional population is happy with their living conditions, a figure that climbs to a remarkable 86% within the Tricity area which is the highest results recorded in Poland. This success is largely attributed to the region's unique natural assets, including 316 km of coastline and nearly 3,000 lakes, complemented by over 2,000 kilometers of cycling lanes and a rich, year-round cultural calendar.

The region is a rare combination of stunning landscapes, dynamic economic growth, strategic accessibility, and vibrant cultural identity.

Gdansk

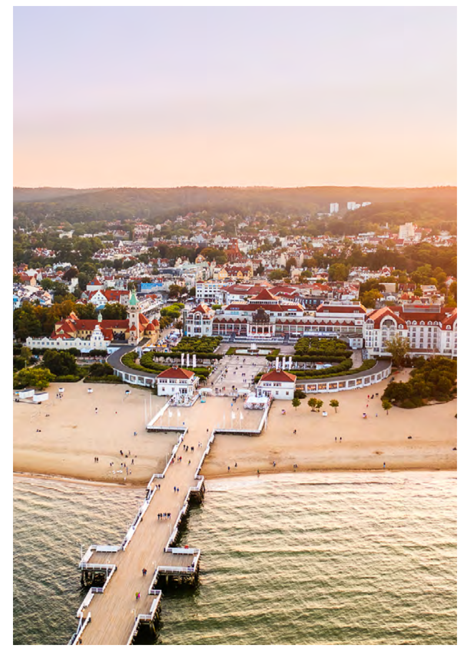
Serves as the region's economic powerhouse, Gdansk is the go-to for those seeking a high-energy job market and developed city infrastructure. It blends the charm of its historic Old Town with the innovation of the Oliwa business district, earning its reputation as a "People Friendly City" (Forbes 2020) that offers a true metropolitan experience.

Gdynia

Boasts a unique blend of modernist architecture and atmosphere with urban efficiency. It is the ideal choice for people who prefer compact cities without sacrificing high-tier career opportunities Famous for its modern architecture and urban infrastructure, Gdynia offers a vibrant energy that attracts broad range of residents and professionals. It offers a balanced environment where residents can both work and relax.

Sopot

Shines as the stylish heart of the Baltic, where lifestyle and business meet. Sopot is a place for those who want the intimacy of a seaside resort combined with the cultural energy of a major city. Beyond the iconic charm of its vintage villas and seaside promenades, the city provides a rare microclimate where long beaches and coniferous forests aren't just tourist attractions but a part of everyday life.



KPMG

Environmental Quality

Clean Baltic air and expansive coastal landscapes provide a natural sanctuary for residents. The region's commitment to preserving its maritime ecosystems ensures that industrial growth never comes at the expense of ecological integrity. This dedication to the environment is evidenced by extensive investments in offshore wind energy and water purification systems, securing a sustainable future where the sea remains a source of health and recreation for generations.

Safety and Resilience

The region is known for its strong foundations and steadily improving public infrastructure. Its resilience comes from a maritime economy and a highly diverse energy sector, which help protect it from changes in global markets. This stability is supported by a well-developed public transport system, including the Pomeranian Metropolitan Railway (PKM) and Fast Urban Railway (SKM), which smoothly connect major cities with surrounding towns and rural areas.

Cultural Vitality

A year-round calendar of international film festivals, music events, and culinary innovation ensures that "Quality of Life" is a lived experience rather than just a marketing slogan. This cultural dynamic is supported by institutions like the European Solidarity Centre and the Gdynia Film Festival, which blend historical reflection with modern artistic expression. From the open-air concerts in Sopot's Forest Opera to the industrial art spaces in the Gdansk Shipyard, the region offers a diverse and inspiring environment that attracts talent from around the world.

Pomerania has successfully cracked the code for modern regional development. The region sees talent not only as a workforce, but as people who value clean air, culture, and quality of life as much as good career opportunities. Thanks to the efforts of Invest in Pomerania and local authorities, the region is no longer just a place to visit, it is an attractive place to live and build a future. Whether you are an investor, or a professional looking for a new beginning, the Baltic coast offers a supportive environment where business success and quality of life go hand in hand.

SSC Sector in Poland

Choosing Poland for outsourcing mainly comes from the strong cost advantages it offers, which allows organizations to achieve significant operational savings without compromising on the quality of the final output. By taking advantage of Poland's competitive labor market, companies can access high-quality services at a much lower cost than in Western Europe or the United States. While hourly rates in the US and Western Europe often reach $100–$150, Polish IT professionals typically charge between $25 and $70 per hour. Similar savings of around 50–70% are also commonly seen in departments such as Accounting, HR, and Customer Service.

Poland's central European location serves as a primary strategic bridge connecting the continent's major economic zones. Positioned at the intersection of major European transit routes, it acts as a natural logistics hub for the entire European Union. This geographical advantage is supported by rapidly expanding infrastructure. Poland now boasts the fifth longest highway network in the EU, with over 5,200 km of motorways and expressways. In addition to 13 international airports in cities all over the country, Poland is currently developing the Central Communication Port (CPK) which is designed to be one of Europe's largest transport centers, integrating air, rail, and road travel into a single ecosystem. Poland's location in Central Europe also offers a strategic advantage for companies in both the US and Western Europe. The country's time zone overlaps significantly with Western Europe, enabling real-time collaboration during regular working hours. For US-based companies, there is partial overlap with the East Coast, which helps maintain effective communication despite the time difference. Besides the time zone, Poland shares many cultural and business practices with Western Europe and the US, which supports smooth cooperation and project management. On top of that, Polish professionals are widely recognized for their strong work ethic, reliability, and attention to detail. This reputation is built on a foundation of high academic standards and a strict educational system that emphasizes analytical thinking. This commitment to quality and accountability ensures that tasks are not only completed on time but also meet the high-tier standards expected by global enterprises.

Poland is home to some of Europe's leading universities, producing nearly 300,000 graduates each year who are familiar with the latest technologies and methodologies. The total number of students in the country (~1.2 million) is equal to the number of students in all other Eastern European countries combined. Poland ranks third in Europe in the number of STEM (Science, Technology, Engineering, and Mathematics) graduates, with more than 40,000 IT specialists entering the job market annually. English proficiency among Polish professionals is high, with Poland consistently ranking in the top 10 of the EF English Proficiency Index. After English, the most common languages used in business service centers in Poland are German (74%) and French (68%), which ensure smooth communication with clients from the US and Western Europe.[4]

Poland's GDP has been growing steadily, with an average annual growth rate of around 4% over the past decade. This economic consistency creates a low-risk environment for outsourcing engagements. The dynamic growth of Poland's economy is most visible in its business services sector – in just 15 years, the industry's workforce surged from 50,000 employees in 2006 to approximately nearly half a million people across Shared Service Centers, GBSs, and R&D hubs in over 2.800 service centers in over 80 cities[5], offering expertise in analytics, finance, and HR.
To enhance both operational efficiency and service quality, the sector has quickly integrated newest technologies,ranging from Robotic Process Automation (RPA) and AI chatbots to cloud-based platforms. The depth of this digital shift is evident in the fact that 25% of service centers in Poland have already automated more than 30% of their core processes[6], with a significant number of organizations actively deploying artificial intelligence across finance, HR, and IT operations.

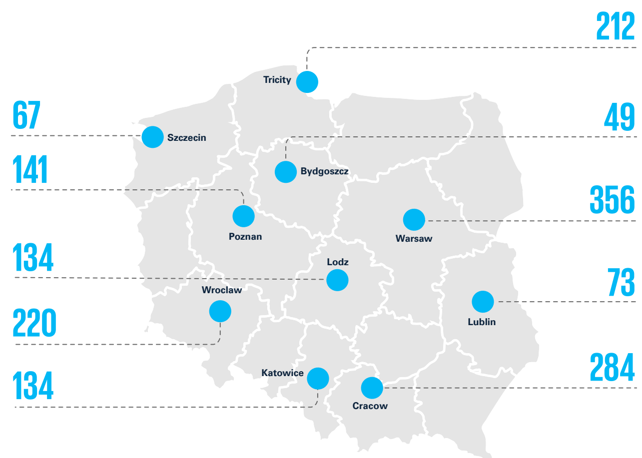
By expanding traditional functional scopes and accelerating digital capabilities like automation, analytics, and reporting, GBS organizations are becoming more customer-centric and aligned with the C-suite.

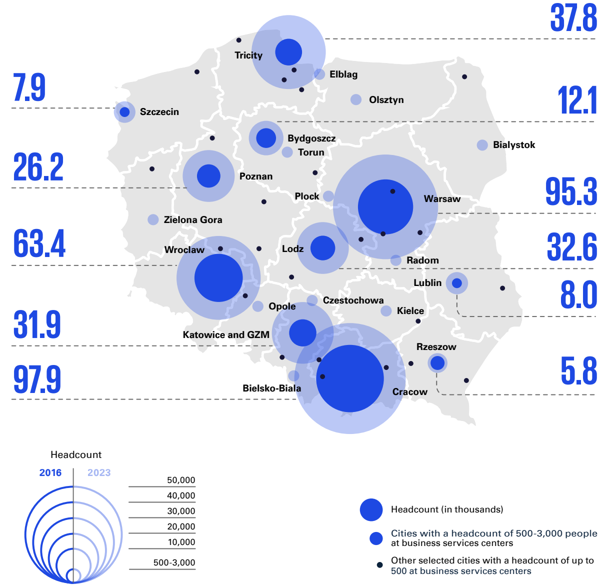
4 https://outsourcingtopoland.com/#:~:text=,significantly%20impact%20your%20bottom%20line

5 https://itelence.com/outsourcing-poland-benefits; https://absl.pl/en/news/p/Record-growth-in-the-value-of-business-services-provided-in-Poland#:~:text=ABOUT%20ABSL

6 https://www.randstadenterprise.com/insights/randstad-enterprise-insights/talent-trends-for-business-services-companies-in-poland

Number of business centres and their employees in Poland





Source: ABSL report Business Services Sector in Poland 2025.

Poland's business services sector[7] has evolved into a strategic pillar of both the national economy and Europe's services landscape. Its future success depends on transitioning toward more intelligent, agile, and inclusive service models. Poland's business services landscape (BPO, SSC, GBS, IT, and R&D) is projected to maintain a steady yet moderated growth trajectory as the global market stabilizes and industries modernize their cost models and operations. While the country remains a premier nearshoring hub backed by its professional talent pool and EU integration, the rise of AI-driven tools and hybrid work is set to transform traditional recruitment.

7 https://invest.lodz.pl/files/invest/public/ABSL-2025-EN.pdf

In Q1 2023 there where 1.803 BPO, SSC / GBS, ITO & R&D business services centers in Poland.

In Q1 2025 this number grew to 2,081 business services centers.

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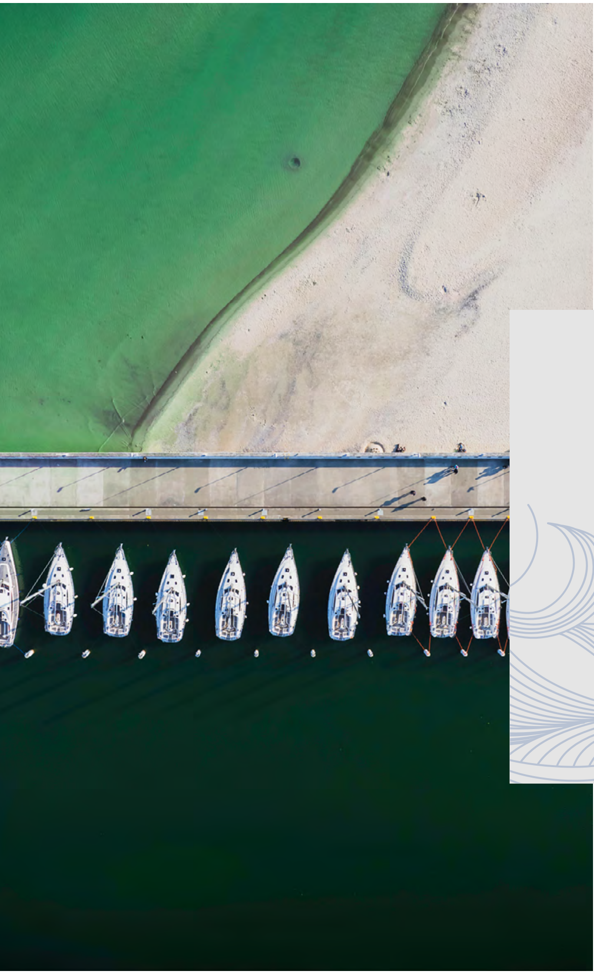

Companies will shift towards higher-value services and technology--oriented (AI, cybersecurity, and cloud-based solutions) rather than purely labor cost arbitrage.
This also means that:

Exports of business services will grow by
6.0%
YoY in 2026

New center openings will range between
35–50
throughout 2025–2026

Sector employment will expand by
3,2%
annually to over 500,000 in 2026

Export productivity per worker will be equal to
USD 67,200
per FTE by 2026

Strategic transformation has become the industry standard, with over three-quarters of firms currently executing or maintaining such initiatives. By 2030, most expect to have deeply integrated digital and AI solutions, supporting Poland's shift away from low-cost delivery towards a value-creation hubs. This transition is often characterized by moving beyond transactional tasks like basic accounting and data entry to complex, end-to-end processes. Polish Business Centers Rather than just doing the work, are also beginning to design the way work is done. Transformation is shaped by geopolitics, labor market pressures, and technological acceleration, with India, Romania, and the Philippines emerging as Poland's key global competitors.

Ultimately, Poland represents a premier choice for organizations seeking to establish a GBS center. It offers strategic geographical positioning, strong economic indicators and a highly skilled talent pool. By balancing significant cost efficiencies with high-tier expertise the country has transitioned from a traditional outsourcing hub into h-value services.

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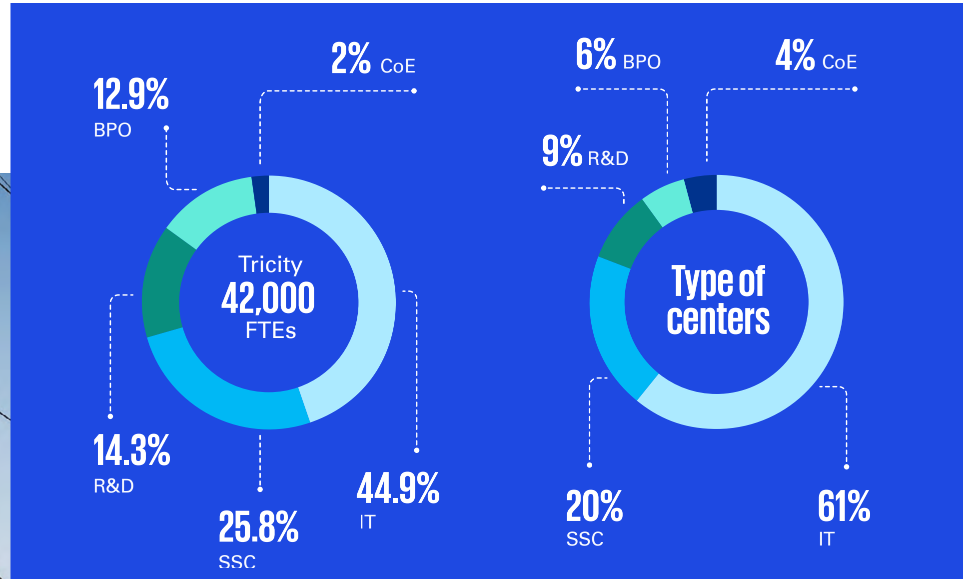
Tricity GBS Landscape

The business services sector in the Tricity has established itself among the mature BSS destinations, both in Poland and in CEE region. Two main components of such evaluation can be traced to well-documented market maturity and the a diversity of center types in the BSS portfolio. The Tricity's BSS market currently comprises nearly 230 centers employing 41,000 people – both figures represents more than two decades of sustained growth from a standing start in the early 2000s. Nationally, Poland's BSS sector as of early 2025 encompasses 2,081 business services centers representing 1,258 companies and employing 488,700 highly skilled professionals, accounting for 5.7% of the country's GDP and 7.6% of private sector employment. Tricity, ranked fourth among all Polish locations, contributes a meaningful – and what's especially important – technology-intensive share of that national total. Currently, Tricity area occupies the forth position, as Warsaw remains the leading city with 429 centers, followed by Cracow and Wroclaw. Such ranking understates the region's growth dynamics, given that it has achieved this while simultaneously developing a port complex, an offshore energy supply chain, and a technology manufacturing base of a scale that no other Polish BSS location can match. The structural composition of the Tricity's BSS ecosystem is its most distinctive feature.

03



Source: Invest in Pomerania.

Based on dominant organizational profile, the breakdown of center types operating in the Tricity is as follows: IT centres account for almost 45% of the total, Shared Service Centres (SSC) for 25.8%, R&D centres for 14.3%, Business Process Outsourcing (BPO) centres for 12.9%, and Centres of Excellence (COE) for the remaining 2%. This distribution is widely different from the national average and from most competing Polish locations; the combined share of IT and R&D of approximately 60% reflects the engineering talent base incubated by tech related investments such as Intel and Amazon, and the comparatively low BPO share signals that the Tricity has "grown out" of the transactional outsourcing phase that is familiar in the growth trajectories of the less--mature locations. The COE share, while modest in percentage terms, is particularly significant in qualitative terms – Centres of Excellence represent the highest-value, most strategically embedded category of BSS investment. Growing presence of COE's in the portfolio mix is a testimony of the Tricity region's capacity to host and retain sophisticated, globally integrated operations. The diversity of the Tricity's tenant mix is in itself a distinguishing feature. While most regional Polish cities have developed their BSS sectors predominantly around the business services industry, the Tricity's offer encompasses energy, transport, maritime, and logistics sectors alongside conventional BSS. Such wide array of encompassed business services created demand for office space and talent that is both broader and more resilient than single-sector--dependent locations.

Trends in Tricity BSS sector

Year after year, the Tricity continues to record the opening of new centers – a trend that has persisted despite market fluctuations and isolated instances of employment contraction. The BSS sector in the region remains on a growth trajectory and continues to attract new investment, although the pace of that growth has moderated in line with broader national trends. As is the case across the Polish market as a whole, companies are seeking to utilize Tricity talent more effectively for increasingly advanced processes – a shift driven by the workforce upskilling and management of rising employment costs. One of signs of this restructuring dynamic is the growing prevalence of engineering-focused roles which combine industrial expertise with technological and design competencies. Such roles build bridges synergizing the design, testing, and implementation phases of complex projects, as exemplified by operations established by Siemens Gamesa, Archer, ThyssenKrupp, and Boeing. At process-mature centers, staffing changes typically follow a recognizable pattern; a reduction in junior-level positions is transferred to lower-cost locations or absorbed by automation – accompanied by a corresponding increase in senior and specialist roles. New market entrants are, in a number of cases, deliberately leveraging the pool of experienced professionals released by this restructuring process.

Since the beginning of 2023, 39 new BSS projects have been recorded in the Tricity market, of which 13 represent reinvestments – placing the reinvestment rate at approximately 33%. Of these 39 projects, 24 (61.5%) are IT and R&D initiatives, collectively accounting for over 1,000 newly created positions. The remaining 15 projects, representing 38.5% of the total, span throughout other sectors and have influenced the creation of over 2,000 jobs. Pipeline's composition has also shifted over time; IT projects dominated at the turn of 2023, while the most recent twelve-month period has seen a modest but notable shift back toward SSC, BPO, and COE formats. The geopolitical repercussions of the Russia-Ukraine war have reasserted the influence of political geography on BSS location decisions, and the Tricity's investment pipeline reflects this clearly. The number of new US-originated projects has declined relative to the pre-2022 period, while EU-sourced investments have reinforced their dominance – a pattern consistent with the broader resurgence of nearshoring as a strategic consideration for European corporate decision-makers. Among successfully completed investment projects recorded since 2023, 75% originated from EU countries, including the United Kingdom, while only five of the 39 projects – approximately 13% – came from the United States. In terms of the overall composition of the Tricity BSS market by volume, US-headquartered companies remain the largest single group with 38 centers directly employing approximately 10,000 people, or 25% of total sector employment. Companies from the Nordic countries follow closely with 34 centers, ahead of DACH-headquartered and

UK- and Ireland-headquartered operations, each represented by 15 centers.

Several sectoral specialization trends have emerged with sufficient clarity to be considered defining characteristics of the Tricity's GBS identity. The maritime cluster – encompassing companies such as Hapag-Lloyd, DAMEN, Mowi, Noble, ONE, and SAAB – represents the most geographically distinctive of these, combining diverse business-specific operational profiles with a shared foundation in maritime domain expertise. Equally significant, if somewhat less immediately visible, is the aviation cluster: Boeing, Skywise-Airbus, Lufthansa Systems, and Cyclad, together with a number of smaller specialist investors, collectively constitute the Tricity Aviation Hub, employing approximately 2,500 people across the agglomeration. The region has also established a strong position as one of Poland's most active financial security hubs, with AML and KYC processes particularly well represented – investors including PwC, LSEG, Broadridge, Santander, State Street, Nordea, and Orlen collectively employing between 3,500 and 4,000 professionals in these advanced financial compliance functions.

Finally, the semiconductor and hardware R&D cluster – anchored by Intel, which operates its largest European development center in Gdansk and is the largest BSS employer in Pomerania, complemented by the more recently established operations of SK Hynix and Solidigm – illustrates the depth of the region's R&D specialization and the extent to which the Tricity has evolved beyond conventional BSS formats into frontier technology development.

Arla

Arla Global Financial Service Center Sp.z.o.o

Represented by
Artur Świętoń
Head of Arla Global Shared Services

Centre type: GBS / IT

Year of establishment: 2008

Current headcount: ~900

Primary functions: Financial Services, HR, Procurement, Automation, IT

Key languages supported: English, Scandinavian

Location within Tricity: Gdansk – Biurowiec PUNKT

Parent company HQ: Viby, Denmark

> "And that's incredibly important in our company – this aspect of employee engagement, which we measure and nurture – without it, we would not have been able to achieve this."

https://www.arla.com

Arla's journey in Gdansk began over 18 years ago, in 2008. The company opened – what it envisioned at that time – as a simple, financial services center; there were no blueprints for what the center might eventually become. As one of the pioneers among shared service centers established in the Tricity, the Gdansk operation has since become a reference point for how a purely transactional SSC can evolve into a mature and strategically relevant GSS organization.

Gdansk emerged as the chosen location over competing Polish cities through a combination of factors. The availability of graduates, the structure of the local labor market, and the accessibility of candidates eager to enter international employment all featured in the evaluation – but it was the city's Scandinavian dimension that ultimately tipped the scales. The Baltic Sea corridor, with its direct ferry connections and strong air links to the Nordic countries, placed Gdansk in a distinct position among Polish candidates. The presence of Scandinavistics programs at the University of Gdansk has also helped to bridge the linguistic and cultural gap to the parent company's market. The original headcount target was approximately 200 people, which rose over the past two decades into over 900 employees, covering processes far beyond the reach of a simple financial shared services center.

At inception, the Gdansk center was deliberately designed as a traditional, transaction-focused shared services operation, with finance as its primary scope. While finance and accounting remain a core pillar, they are now accompanied by procurement, human resources, IT helpdesk serving the entire Arla group, multiple IT departments engaged directly in system design and maintenance, financial controlling, customer service, logistics and certain specialist units which include risk management, product management, and master data functions. The center's product portfolio displays a profile that spans the full operational spectrum of a modern GSS center. What is most important, however, is not the range of functions, but the strategic weight they collectively carry. In the eyes of the center itself – the Gdansk center has become the engine that ensures the entire group runs smoothly. This mandate is most clearly visible during acquisitions and strategic investments, where teams from Gdansk lead the implementation of systems and financial processes for newly integrated business units. When the company pursues an acquisition or a strategic investment, it is the Gdansk center's IT and financial process teams that lead the integration of the new business unit into group operations: implementing systems, embedding processes, and absorbing an entirely new organizational entity into the operational fabric of the wider group.

The success behind the Gdansk GSS is also anchored in its adaptation to the Scandinavian work and culture model, which was the key enabler of the center's expansion. This model places strong emphasis on dialogue, open communication, and giving employees a voice in shaping how work is performed. As highlighted in the interview, engagement is actively measured and nurtured, and without this focus the center's rapid growth would not have been possible. From the parent company point of view it is vital for the service centers to align themselves with the main company's organizational culture, as it allows for seamless communication and a clear vision for the common goals. This cultural approach is reflected not only in management practices, but also in tangible workplace standards. In line with Nordic norms, the center offers on-site meals for employees, reinforcing everyday well-being and supporting a collaborative, people--centric work environment. The maturity of this approach is also visible in the physical working environment. The center now operates in its third office location in the Tricity, aligned with the organization's growth and offering modern workspace standards in one of the best-connected areas of the metropolitan region. The strength of the Scandinavian-inspired culture is reflected in workforce stability. It can be observed in the center's low labor attrition – as much as 10% of the employees have been working for more than a decade. It has to be taken into account that during the 18 years of its existence, the total headcount grew by 450%, with the past few years being a period of rapid expansion. Such results are impressive in an industry typically characterized by high employee turnover.

It is worth noting that the cost aspect was not the main factor during the decision making process. The primary goal was the quality and reliability of the provided services to support the head company operations. Fulfillment of these aspects lead to increased investments in the Gdansk center, and was a direct result of achieving the strategic goals set-up during foundation. This flexibility has effectively turned the Gdansk center into a strategic talent reservoir capable of supporting the organization beyond its local mandate.

> **"It is hard to quantify it, but if some area in Arla needs personnel, expertise, or skills, we're ready to send someone out to the site."**

Such development of the operations is a part of a GSS lifecycle observed more broadly across Poland services sector. In line with interview insights, the center is gradually moving away from junior, low-complexity roles as automation and robotics absorb repetitive execution. The skillset is expanding proportionally to the expectations of the market, to constantly meet demands set up by the parent company. As it can be observed in other mature GSS locations, the simple transactional processes are being slowly replaced by more knowledge-intensive processes. The primary competencies now prioritized include problem--solving, understanding end-to-end business context, and accountability for outcomes rather than mere task execution. The rising importance of problem-solving skills paired with independence and accountability, encourages employees to determine and purse the end value in every handled process. Increased importance of the center can be clearly demonstrated in the company's approach to it's operation – as the Arla's center in Gdansk has become a vital part of the whole organizational structure and not merely a transaction support. It can be as well observed in the composition of the center and its management framework, in which some parts are still traditionally linked throughout the GSS, while others are reporting directly to their corresponding departments in the parent company. Artificial intelligence is already influencing this shift, although still at an early pilot stage, gradually changing the nature of work toward supervision, validation, and quality control rather than execution. Since 2022, selected areas have been supported by global end-to-end process owners based in Gdansk, responsible for transforming processes across the entire organization rather than managing isolated transactional scopes.

Boeing

"It's important that we showcase ourselves on the map, but on the other hand, this makes us more vulnerable to global turmoil. Gdansk is such an important location because it demonstrates the professionalism and class of the location."

https://www.boeing.pl

Boeing Digital Solutions & Analytics

Represented by
Honorata Hencel
Managing Director for Poland and Ukraine regions

BOEING

Centre type: R&D, CoE

Year of establishment: 2003

Current headcount: ~300

Primary functions: Software Development, Digital solutions

Key languages supported: English

Location within Tricity: Gdansk – Arkonska Business Park

Parent company HQ: Crystal City, Virginia, USA

The Boeing engineering center in Gdansk stands as a prime example of the strategic role that Polish centers can play within the grand operations of a global company. While Boeing has been present in the country for more than 30 years, the engineering center was founded in 2003 – making it one of the oldest service hubs in the Tricity area. Operating as a Research and Development (R&D) center, the highly specialized facility contributes to all of Boeing's major operational domains. With a primary focus on engineering and software development, it supports both commercial products and advanced research programs, underscoring Gdansk's pivotal role in the continuous development and enhancement of Boeing's core solutions and services worldwide.

These programs are responsible for a number of improvements embedded in airline software, including flight path support and maintenance schedule forecasting. It is estimated that every fifth flight in the world uses maps created in the Gdansk center. The center's teams are organized around direct client-facing delivery, though the center also encompasses a range of internal enterprise support functions spanning multiple processes. The largest of these is the IT team, which in Gdansk numbers approximately 30 people and is responsible for supporting the software solutions used by employees across the organization, as well as the infrastructure on which those solutions operate. Beyond IT, the center hosts teams working in the broad field of data science, including automation – though this automation work is oriented not toward internal process improvement but toward the development of client-facing solutions. One notable example is the Boeing Defense Analytics team, which develops solutions that leverage data to optimize the design of military platforms and accelerate the delivery of components across military supply chains.

The center's approach to artificial intelligence is strongly rooted in practical, safety-critical applications rather than generic automation. Due to the highly regulated nature of aviation, all AI-supported processes operate under strict human-in-the-loop principles, ensuring full compliance with certification and safety requirements.

Data security plays a central role in Boeing's use of AI technologies. Rather than relying on publicly available tools, the company operates dedicated, internal AI solutions trained on controlled data sets and governed by strict access rules.

In total, the center's work is structured around three main business and product groups, complemented by the military and AI data science functions and finally the operational support teams. This structure is further reinforced by the center's position as one of Boeing's four most important engineering hubs worldwide, alongside locations in Brazil, India, and Ukraine.

Within Boeing's global engineering network, locations such as India play a complementary role, operating at a very different scale and serving distinct purposes. The Gdansk center does not compete with these hubs on volume or cost, but instead focuses on high-value, specialized engineering domains where deep expertise and close collaboration are critical.

At the same time, the center operates in an environment shaped by a number of structural challenges. Its growing visibility and strategic importance within Boeing's global footprint increase exposure to broader market, geopolitical, and regulatory fluctuations. In addition, the highly specialized and regulated nature of aviation engineering limits the availability of experienced talent and constrains the pace at which advanced technologies, including AI, can be deployed. As a result, the center's development requires a careful balance between growth ambitions, quality standards, and risk management.

Looking ahead, the Gdansk center is expected to continue expanding its core competencies in engineering, software development, and data science. Planned growth over the next few years includes steady increases in headcount, complemented by investments in modern engineering infrastructure, laboratories, and IT systems. This development is designed to strengthen high-value, specialized capabilities rather than scale purely through volume.

The center's development relies on a robust talent sourcing strategy that draws both from the Tricity area and from other locations across Poland. Within the local talent pool, the presence of the Gdansk University of Technology alongside the Maritime University and Naval Academy generates a substantial pipeline of engineering graduates each year. When sourcing talent from further afield, the center benefits directly from one of the Tricity's biggest competitive advantages as a relocation destination – employees are genuinely eager to move to Gdansk, drawn by the quality of the surrounding environment and the city's broader appeal as a place to live. The effective catchment area has expanded further still as a result of hybrid working models and flexible employment arrangements, with the Tricity and its well-connected surrounding areas increasingly recognized as one of the most attractive quality-of-life destinations in Poland – a factor that weighs heavily in candidates' relocation decisions.

Boeing also invests actively in university partnerships, extending its academic engagement well beyond the Tricity. Ties with technical universities in Gliwice and Katowice are a notable example, supported by a dedicated University Week program in which students are invited to spend a full working week at one of the company's Polish offices, experiencing the day-to-day reality of professional engineering work firsthand. The center further embeds itself in the regional ecosystem through active engagement with local suppliers and partner companies that share an understanding of the Tricity's strengths and a common interest in developing the market. The presence of other technology companies in the region reinforces this dynamic, contributing to a more experienced talent pool from which all operators benefit. The cumulative effect of these factors – locational appeal, academic partnership, ecosystem engagement, and a strong sense of employee identification with the work and its outcomes – is reflected in an attrition rate estimated at between 5% and 7%, a figure that speaks directly to the stability and maturity of the center's workforce.

"At the same time, we work with companies based in the Tricity area that have a strong local presence. We have suppliers who recognize the region's strengths, and we strive to support them so that we can grow together in synergy."

LEMAN

> "I think this center will be more operational, focused on process efficiency and finding synergies – and if we manage to achieve some level of expertise along the way, that would be great!"

https://leman.com/contact/poland/

LEMAN Service Hub Poland

Represented by
Tomasz Szewców
Managing Director & Global Transformation Leader BPO/SSC

Centre type: SSC

Year of establishment: 2025

Current headcount: 68

Primary functions: HR, Finance, IT

Key languages supported: English

Location within Tricity: Format Business Park, Gdansk

Parent company HQ: Greve, Denmark

The establishment of LEMAN's shared services center in Gdansk shows that, even as the growth of the GBS sector in Poland is stabilizing, new centers are still being developed. The region continues to be an attractive and reliable location for business services, particularly for companies with a Nordic footprint.

Founded in 2025, LEMAN's Service Hub brings together key operational functions within HR, Finance and IT. While the center is still relatively small, with around 70 colleagues, it plays a meaningful role in the overall organisation. It represents a focused step towards centralizing core processes and building a more scalable operational setup.

For LEMAN, this is the first time the company has introduced a shared services model. That in itself has made the setup both ambitious and complex.

Operating in the logistics industry adds another layer. It is a fast-moving and highly time-sensitive environment, where delays and disruptions can have immediate consequences. Establishing a centralized setup under these conditions requires careful coordination and a strong focus on operational stability from day one. Rather than building a fully mature model from the outset, the center is designed as a first strategic step, with a clear focus on learning, adapting and gradually strengthening the setup over time.

The center is built on a modern technology foundation, combining TMS and ERP systems with business intelligence tools. One of the key use cases is invoice processing, where AI is already supporting the handling of large volumes. Here, automation is not about replacing people, but about enabling colleagues to work more efficiently and focus on higher-value tasks. This targeted use of technology makes it possible to run a shared services setup effectively, even at a relatively modest scale.

Gdansk was chosen for a combination of cultural, operational and talent-related reasons. For many Nordic companies, the city is a natural entry point into Poland. Its geographic location, strong maritime connections and existing presence of Scandinavian businesses create a familiar and trusted environment. At the same time, the local workforce is well aligned with Nordic ways of working, both in terms of language and business culture. The region's strengths in logistics and related industries were also a strong match for LEMAN's needs. Combined with a solid academic base and a less saturated labour market than some of Poland's larger hubs, this has made it possible to build the team without the needfor extensive recruitment efforts outside the region.

At this stage, the priority is clear: to stabilize operations and build a strong foundation. As the company's first shared services setup, the focus is on creating strong links between the center and the wider organisation, ensuring reliable delivery across all functions and continuously improving processes. For a center at this stage, operational consistency is more important than rapid expansion. Over time, as the organisation matures and experience grows, more specialised roles and capabilities are expected to develop naturally. In a sector that is sensitive to both economic and geopolitical changes, this focus on stability is essential.

The LEMAN case shows that shared services are not only relevant for large multinational companies. Even at a smaller scale, it is possible to create value through centralization, improved processes and the smart use of technology. For LEMAN, the center in Gdansk is an important step towards a more efficient and scalable organisation, with a clear focus on supporting the business both now and in the years to come.

London Stock Exchange Group

London Stock Exchange Group, Gdynia

Represented by:

Nuno Rodrigues
Director, Non-financial risk, Site Lead Gdynia

LSEG
Make more possible

Centre type: COE

Year of establishment: 2006

Current headcount: ~1200

Primary functions: Finance, Data Analytics

Key languages supported: English

Location within Tricity: Gdynia

Parent company HQ: London, United Kingdom

LSEG's presence in Poland began over 20 years ago with the establishment of a center in Gdynia under the Reuters brand. Gdynia became a permanent base that accompanied the organization through successive stages of transformation, leading to its current position within LSEG. In the early years, the work was predominantly manual in character – centered on data analysis and data entry – and the language skills of the local talent pool were among the most valued competencies a candidate could bring. The center was created to serve various European markets and to handle content that will require knowledge of European languages.

> "Twenty years ago, collecting this data was a very labor-intensive process, and over the past 20 years, this part of the business has changed so much that it's fair to say that today, in the modern era, the roles known as Ctrl+C and Ctrl+V no longer exist."

https://www.lseg.com/en/careers/where-we-work/gdynia-poland

The center operations evolved, in a way, mirroring the evolution of the maturity across Polish market as a whole. This evolution also reflects a broader shift in the global information landscape, where data has become widely accessible, but trust, validation, and context have grown in importance. As markets became faster and more complex, the role of the center increasingly moved from data collection toward ensuring data reliability, interpretability, and decision-grade quality. While foreign language proficiency remains a useful attribute, a substantial share of translation and language-dependent tasks has been absorbed by NLP tools and AI-assisted solutions, redirecting human effort toward more knowledge intensive processes. The technical competencies now in greatest demand include automation, Python, Power Automate, and the ability to work effectively with AI tools across a range of operational contexts. Entry-level candidates and recent graduates are arriving increasingly well prepared for this environment – a development the center attributes in part to the deepening collaboration between the Tricity's universities and the business community. Recruiting highly experienced specialists, particularly in AI and advanced IT, remains a competitive challenge, as it does across all Polish markets.

Within the Tricity, the functional distinction between Gdansk and Gdynia is, in practice, minimal – the agglomeration operates as a single coherent labor market, and the boundary between the two cities presents no meaningful constraint on recruitment or workforce planning.

The technological journey of the Gdynia center is one of the more instructive case studies available in the Polish GBS landscape. Today, the center supports processes whose continuity and accuracy are critical to the functioning of global financial markets, where errors may carry immediate systemic risk. Processes that were once entirely manual – dependent on human analysis and the laborious entry of data – have been progressively automated. Deepening partnership with Microsoft, in particular, through access to Power Apps and a suite of automation tools that have fundamentally changed the nature of the work performed. What remains after automation is more expert in character – the center today operates on the combination of advanced analytics, technology development, and artificial intelligence, with these areas representing the most actively growing segments of its activity. Rather than removing human involvement, automation and AI have shifted accountability upward-placing greater responsibility on human judgment, validation, and critical oversight.

LSEG's Risk Intelligence division clearly illustrates this trajectory; from a single employee more than a decade ago to a team of over one hundred today. This development was enabled by the center's ability to build domain expertise over time, combining data competencies, regulatory understanding, and technology into a scalable risk capability. The growth arc reflects both the rising strategic importance of risk management within financial markets infrastructure and – what's more important – the center's demonstrated capacity to build specialist operations at scale. The organization has also formalized its AI ambitions through a company-wide strategy designated AI LSEG Everywhere – a program designed to embed artificial intelligence across operational processes and commercial products. At the core of this approach lies a recognition that AI derives its value not from automation alone, but from the quality, provenance, and credibility of the underlying data. The vision behind it, is to build a culture of experimentation and implementation that treats AI not as a core operating principle. The framing of this transformation is deliberately playing into the increased maturity and capability of the Polish GBS sector as a whole, and highlights the huge development arc which took place over the past two decades.

Where the centers once handled simple manual and transactional tasks – nowadays are responsible for integration of highly complex solutions across the whole enterprise.

"We can see that this potential within the group we manage – based in Gdynia – is clearly recognized and appreciated by managers from other locations as well, where there is a desire to relocate or establish these more specialized roles – whether related to specific areas of excellence, automation, or technology – in Gdynia."

Looking ahead, the Gdynia center's strategic priorities are organized around three main axis – the development of a product-oriented organization, the continued development of AI capabilities, and the strengthening of risk management as a core competency. The strategic direction continues the shift from operational tasks of lower complexity and toward the highly specialized processes and roles that define a mature capability center. The center's support for London Stock Exchange, FTSE Russell, and London Clearing House operations already places it at the heart of some of the most important processes in global financial markets infrastructure. Such trajectory of both investments and capability development suggests that the center's role within the wider LSEG group will only deepen from this already substantial base. The Gdynia center has arrived at a point of genuine strategic maturity – a hub that concentrates tech development, knowledge-intensive processes, develops advanced competencies, and plays a critical role in the global structure of one of the world's leading financial markets infrastructure organizations.

Lufthansa

> "We already play a very important role, but I strongly believe that by continuing to develop our products as described – making them more optimized, integrated, and intelligent – the role of the Gdansk location, will become even more essential and critical in the future."

https://www.lhsystems.pl

Lufthansa Systems Poland

Represented by
Dariusz Przywara
Managing Director

Lufthansa Systems

Centre type: GBS

Year of establishment: 1998

Current headcount: ~1200

Primary functions: Data analytics, Software Development

Key languages supported: English, German

Location within Tricity: Gdansk – Alchemia Argon

Parent company HQ: Raunheim, Germany

Lufthansa Systems Poland was established in Gdansk in 1998, making it one of the first service centers in the Tricity area. Originally founded as LIDO Technology – a subsidiary of LIDO GmbH, as a part of Deutsche Lufthansa AG. The center was created primarily to build a LIDO (Lufthansa Integrated Dispatch Operation) flight planning system. The LIDO, system is currently used to maintain flight plans that underpin the majority of flight operations across Europe, and a significant number of routes worldwide. The strategic significance of the center is highlighted by the fact that the entire process is executed locally: solutions are developed in Gdansk, on the basis of data collected and analyzed in Gdansk.

The center's activities are organized around two distinct operational pillars. The first, is responsible for optimizing every aspect of flight operations and maximizing the quality of the pilot experience – including the development of applications used directly by flight crews.

The second is dedicated to software development and the delivery of solutions designed to streamline the customer experience, addressing the needs of both passengers and airports.

One particularly critical example within this first pillar is handling and processing of NOTAMs (Notice to Air Missions) – standardized aeronautical information, delivering real-time updates on key aspects of air travel, including the opening and closing of airspace and the operational status of runways which are fundamental for flight planning and operational decision-making. In practice, missing NOTAMs prevent flight planning and airport operations, effectively grounding the airline's fleet.

Commercial solutions delivered by the center include passenger and mobile applications developed for airlines within the Lufthansa Group, as well as a range of integration solutions for over 350 external clients.

The maturity of Lufthansa Systems Poland is all the more impressive considering our journey from modest beginnings nearly three decades ago to becoming one of the largest and most advanced service centers in the Tricity area today.

The decision to establish the center in Gdansk was shaped by several factors. The city's academic infrastructure proved to be the primary one; the University of Gdansk, Gdansk University of Technology, the Polish-Japanese Academy of Information Technology, and the University of Applied Sciences in Elbląg collectively offered the technical – and technological – knowledge base that the company needed to build its operations from the ground up. At the time of the center's establishment, the local IT sector was considerably less developed than it is today – technology companies were scarce in the Tricity – but the academic ecosystem was already producing technically proficient graduates that the center required. The second critical dimension was aeronautical knowledge – and here the situation was more complex as expertise in aviation and aeronautics was not available in the Tricity at that time, nor was it widely present elsewhere in Poland. What Gdansk did offer, however, were links to adjacent branches such as logistics or maritime industries. These sectors share meaningful parallels with aeronautical operations. For example – aerial and maritime cartography operate on similar principles; the logistical frameworks governing sea and air transport bear significant resemblance, and thus skillset needed for both sectors are largely comparable. These foundations made Gdansk a viable base on which aeronautical expertise could be systematically built upon – even if it did not exist there yet.

Throughout the years, the center started to develop that expertise itself, not only by cooperating with local universities but also by constructing dedicated internal training programs for the specialists who would go on to manage business critical operations.

Since its founding, the Lufthansa Systems Poland center in Gdansk has been oriented toward value-adding optimization and automation processes. In recent years, this focus has gained further importance as these domains have become central to global economy and technology development. At Lufthansa Systems Poland, competencies are continuously developed, serving as the foundation upon which more advanced solutions are built. The pace of change is closely tied to advances in mobile, cloud, and AI technologies, all of which are already influencing both the efficiency and the effectiveness of the center's operations. In line with trends observable across the global technology sector, IT organizations are gradually reducing the proportion of junior and less knowledge-intensive roles, replacing them with digital solutions. Senior and expert roles, on the other hand, remain in high demand. The presence of other companies with comparable talent requirements in the same market may intensify this pressure; however, it can equally contribute to the formation of more experienced talent availability within the sector. Competition for specialist profiles may slow individual recruitment processes, but over time it yields a broader and better-qualified candidate base from which all can benefit.

Looking ahead, the center's three decades of expertise in optimization and automation position it to play a significant part in the context of two of the industry's most pressing requirements: cost reduction and ecological sustainability. The center is actively developing systems designed to reduce fuel consumption during flight and takeoff, and to optimize transport in terms of cargo efficiency and flight duration – a direction that will continue to define its development arc. On the commercial side, the center is focused on optimizing passenger application interactions and delivering seamless user experience. Artificial intelligence will be integral to this work going forward, enabling deeper integration across systems and driving the development of faster and smarter solutions.

Nordea

> “We are not some separate, clearly outlined entity; rather, we are fully integrated into Nordea’s structures. I think that’s a very significant difference compared to other BSSs.”

https://www.nordea.com/en/careers/poland

Nordea Business Support Services

Represented by
Sebastian Wilczewski
Head of IT Analysis and Quality Assurance

Nordea

Centre type: GBS

Year of establishment: 2010

Current headcount: 6000 (whole Poland)

Primary functions: Financial Security, IT, Data analytics

Key languages supported: English, German, Nordic languages

Location within Tricity: Gdynia – Tensor Office

Parent company HQ: Helsinki, Finland

Nordea’s presence in Poland can be traced back to 1999, although the initial footprint was mainly about banking operations. In 2010 the company established its first business support service center in the country, with the first location founded in Łódź with a headcount of approximately 60 employees. Cost-effectiveness was the primary consideration driving that decision. In around 2013, Nordea Bank started process to sell its Polish banking operations to PKO BP – and this transaction raised fundamental questions about the future of the company’s broader presence in the country. Within three years, the center established a strong reputation and a specialized talent pool for advanced processes. Nordea consequently committed to expanding its presence across Poland’s principal cities, with Gdynia and Gdansk emerging as one of the key locations in that strategy. Over time, the Tricity has developed into Nordea’s strongest Polish hub, concentrating a significant share of both technological and business support capabilities.

It is worth noting that Nordea’s Polish centers do not operate as standalone shared services units in the conventional BSS sense – instead, they function as fully integrated components of the wider organization, a characteristic that distinguishes the company from the typical shared services center integration model. Instead of a separate service layer, employees in Poland are embedded directly into global organizational units, working alongside colleagues from Nordic countries within the same functional structures.

As with other Nordic companies operating in the region, the decision to establish a presence in the Tricity can be traced in large part to its geographic position. The Tricity is frequently regarded as a gateway to Poland – both literally and figuratively. In the literal sense, physical proximity to the Nordic countries is a significant factor, and the strength of the air connection network – linking the region directly to Stockholm, Helsinki, and Copenhagen – has made operational collaboration considerably easier. In the figurative sense, the Tricity functions as an entry point due to the well-established presence of other Nordic companies in the area, which has cultivated a local talent pool already familiar with Scandinavian working culture and business practices – and such familiarity can meaningfully improve integration for new entrants. From the establishment of the Tricity centers in 2013, the Gdansk and Gdynia operations were responsible primarily for IT functions, while the center in Łódź managed business support operations. In practice, this meant that technology functions became the initial anchor for Nordea's expansion in the Tricity. Over time, the Łódź talent market began to show signs of saturation, and the centers themselves began to require increasingly specific competencies such as Nordic language proficiency. The Tricity's academic ecosystem was better positioned to supply as it is one of the few in Poland to operate Scandinavistics programs. This shift increased the importance of the Tricity centers and directly led to their expansion beyond their original technical scope, encompassing business support functions. Although the balance of functions has evolved considerably over the years and the centers now cover a broad range of operational areas, it was the IT and digital capabilities of the local talent pool that first established the Tricity as a credible and consequential location within Nordea's global operating structure.

Shifts in global economics and the rapid development of AI technologies are reshaping Poland's GBS sector. Many centers are redefining their operating models in response to rising cost-effectiveness expectations, ESG requirements, and geopolitical uncertainty. At the same time, the sector has visibly matured, with centers progressively taking on more advanced, knowledge-intensive functions while reducing conventional operational roles through automation. Nordea's Polish centers follow this direction closely; a trajectory explicitly reflected in the company's strategic 2030 vision. In this framework, AI and automation are positioned not as tools for workforce reduction, but as enablers of large-scale reskilling and upskilling, supported through cooperation with academic institutions and regional business clusters.

As competitive pressure in the labor market intensified significantly over the past decade – particularly in the IT sector – and as broader shifts in employee market dynamics became increasingly visible, Nordea responded with a series of targeted talent pipeline programs helping to acquire and onboard young talents. Central to this strategy is the establishment of partnerships with local universities. Recognizing that recruitment alone could not meet its talent needs, the company adopted a longer-term approach: building a qualified candidate pipeline in direct partnership with academic institutions. Nordea also invested in attracting professionals seeking career transitions through a range of business initiatives, including the "Future Engineers" and "IT na bank" programs. The latter was specifically calibrated to reach individuals without a technical background who nonetheless demonstrated the willingness and potential to retrain – offering structured upskilling and reskilling pathways through which participants could acquire the necessary qualifications before joining the organization as full-time employees. As a further example of its engagement, Nordea organizes an annual Scandinavian IT Night event, in coordination with other Nordic companies present in the region, designed to introduce candidates to Scandinavian working culture through direct, personal interaction addressing recruitment and talent acquisition challenges. Together, these initiatives reflect a deliberate shift from short-term recruitment toward long-term capability building aligned with Nordea's specific transformation needs.

The strategic priorities ahead for the Nordea are aligned with the path to becoming the best-performing financial services group in the Nordics. This will be achieved by accelerating through scale, people and maximizing the adoption of new technologiesand deepening the upskilling of the workforce. Both efforts are oriented toward delivering the highest possible cost efficiency in full synergy within the whole group. A faster, more reliable service operation translates directly intobetter efficiency and into greater customer satisfaction. In this context, the Poland including Tricity locations are positioned to play an important role in Nordea's overarching ambition: to ensure that the organization – already the largest bank in the Nordic countries – also becomes the most efficient. The locationsin Gdansk and Gdynia are expected to contribute materially to that goal. This perspective reinforces a broader strategic shift away from labor arbitrage toward competence--driven location strategy.

"We don't want to build our presence by relying on the fact that Poland is a lower-cost country, but rather by our ability to provide skilled workers who can help with the transformation."

Solidigm

> "Because of the industry specifics and firmware being lower layer in the solution structure, it is very difficult for AI to learn and apply. Of course, with long time perspective and projected development, it is possible it will happen in the future."

https://www.solidigm.com

Solidigm

Represented by
Włodzimierz Piotrowski
Managing Director

SOLIDIGM.

Centre type: R&D

Year of establishment: 2021

Current headcount: ~150

Primary functions: Specialized IT Engineering and Product- -Focused R&D

Key languages supported: English

Location within Tricity: Gdansk – Alpha ACG

Parent company HQ: Rancho Cordova, California, USA

Solidigm, a pioneer in enterprise data storage, is the industry leader of high-capacity solid-state drives for AI data centers. The company's Gdansk Design Center serves as one of its key research and development facilities. The core of the Gdansk team had been a part of Intel's operations for many years before the SSD division was separated from the company in 2021 and sold to SK Hynix, at which point Solidigm began operating under its own brand. The Gdansk team works on technologies that directly shape global data-center infrastructure and storage solutions used worldwide. What begins as specialized engineering work in Gdansk often results in technologies that redefine performance benchmarks across the global storage market.

The core of the Gdansk operation continues to be responsible for product development and the programs designed to support the creation of new products. Its work spans the full product lifecycle – from early-stage design and prototyping through firmware development, validation, and post-deployment optimization. Engineers from Gdansk Solidigm site are actively involved in creating and proving innovative cross-stack (across SSD drive and server software) ideas improving such metrics as data reliability, data access performance or decreasing power consumption – all of which is critical for modern AI data centers. These innovative efforts by Solidigm Gdansk team members are proven out pby multiple presentations at worldwide storage industry conferences and multiple patent applications filed every year.

Solidigm Gdansk engineers also represent deep knowledge of the storage software stack. The team designs and develops enterprise storage software utilizing multiple tiers of Solidigm SSDs that are actively used by top hyperscalers to optimize data storage in their data centers.

The presence of advanced R&D centers such as Solidigm Gdansk is a clear indicator of the Tricity's technological maturity and ability to host highly sensitive development work.

Solidigm's decision to maintain its operations in the Tricity was shaped in large part by the talent ecosystem already in place. The talent pool was built on the region's concentration of IT and engineering companies, consistently replenished by the output of the area's academic institutions. The Gdansk University of Technology and other local universities regularly produce graduates whose technical profile aligns closely with the competencies the design center requires. Solidigm is actively engaged in cultivating this pipeline, recognizing that talent sourcing in a field of such specialized and intense demand cannot be left to passive recruitment alone. This engagement is visible across a number of cooperative initiatives with local universities, of which Solidigm's internship program is by far the most strategically significant.

A defining feature of the Gdansk site is its advanced laboratory environment, including a dedicated 500 m² testing and development lab where engineers work hands-on with prototypes, firmware and hardware-level solutions.

From a global operations perspective, Poland plays a strategic role as a collaboration bridge between the North America and Asia. Operating in a time zone that overlaps with both regions, the Gdansk team is able to work directly with counterparts in China and the U.S., facilitating real-time cooperation.

Solidigm's work differs fundamentally from traditional IT or shared services – the center focuses on creating new products while maintaining highly advanced existing solutions. This complexity makes it unlikely to find candidates who arrive with the precise skills and readiness to take on responsibilities immediately. Future careers in advanced R&D depend less on routine IT tasks and far more on the ability to learn and build deep domain expertise over time. A structured internship pathway is therefore a strategic necessity, further reinforced by the scarcity of SSD-focused companies in the European market, which limits the pool of experienced candidates. Solidigm addresses both barriers systematically through its internship framework and university partnerships, designed to cultivate the right talent from the ground up.

AI currently plays a supportive rather than transformative role at Solidigm. Given the low-level nature of firmware development and the extreme precision required – enterprise-grade storage must meet reliability thresholds such as a bit error rate of 10E-25 – critical engineering decisions remain firmly with experienced specialists. AI tools are used primarily to accelerate documentation analysis, support early planning, assist in preliminary code verification, identify potential issues early in the workflow, and aid in data analysis and optimization of SSD construction methods. The limitations of current large language models make professional oversight essential in all technically critical areas. While AI's role may expand as the technology matures, it remains an accelerator for low-complexity tasks rather than a replacement for engineering expertise.

The long-term ambition of the Gdansk center is to remain a compact, elite R&D unit capable of delivering breakthrough storage technologies with global reach. Achieving this objective requires sustained focus on product quality, advanced engineering skills, and continuous learning, rather than scale-driven expansion. In this model, the value of the center is defined not by its size, but by its ability to create innovative high quality solutions that shape the future of data storage worldwide.

"If things continue to develop as smoothly as they are now, I believe there is a real chance our company could become the number one – because that is the goal, at least when it comes to the SSD market – to be number one in sales and production of the world's most advanced disks."

Moving Forward

The BSS sector in Tricity has, over the past three decades, undergone a spectacular transformation. What began as a relocation of transactional processes to lower-wage markets has evolved, into a sector that performs some of the most complex, sensitive, and strategically significant operations. Simple wage arbitrage was replaced by sophistication and strive for quality of the broader business ecosystem that was created over these past 3 decades. The market evolution from cost-effective delivery location to strategic innovation partner has been driven by the trifecta of academic background, capable workforce, and the accumulated trust capital built through decades of operational excellence. Within national picture, the Tricity has additional advantages, defined not by the generic strengths of the Polish GBS proposition but by these specific to the region, irreplicable elsewhere in the country.

04

Maturity of the Tricity's BSS Market

The centers presented in the previous section were selected to showcase the Tricity flexibility and capability to handle vast array of sophisticated processes. Together, these perspectives are intended to provide a systemic understanding of a regional market that has earned, through two decades of sustained and compounding development, the right to be considered not merely as a successful Polish GBS destination but as one of the more significant capability clusters in the business services landscape.

Location

The Tricity's geographic position is the foundational layer of its investment proposition, and one that acts as anchor for the initial appeal.

The region offers a combination of attributes that does not exist anywhere else in the country – it's the biggest metropolitan complex with a direct Baltic Sea access, proximity to the Nordic countries via both air and ferry, a port complex of European significance and excellent connection with other Polish and European cities. For the organizations interviewed, this was usually a key component at an evaluation stage. The ability to fly to Copenhagen, Oslo, or Stockholm in under two hours, to receive senior leadership from Nordic headquarters without the disruption of a multi-leg journey, and to position the center as a natural extension of Scandinavian operations rather than a distant offshore outpost was cited, in various formulations, across the majority of cases. The is genuinely connected to them, in ways that reduce the friction of cross-border management and that have, over time, reinforced the sense that the region is a natural home for the specific categories of investment it attracts. Over time these factor have only compounded and are now themselves acting as an appealing argument for further investments.

The Scandinavian dimension of the Tricity's GBS proposition is, already well documented – Nordic companies represent the second largest national group in the market by number of centers, and the cultural and linguistic affinity between the region and its northern neighbors is a consistent theme in investor commentary. What the study adds to this picture is a deeper understanding of why this proximity matters and how it operates in practice. It is not only a matter of shorter travel times – though these are real and valued. It is also the presence of Scandinavian language programs at the local universities – a feature that has influenced location decisions from Arla and Nordea and that has no equivalent elsewhere in Poland.

It is the accumulated cultural familiarity that develops when Nordic companies operate alongside one another in the same market, normalizing Scandinavian working practices and management expectations for the local workforce. And it is the self-reinforcing dynamic through which each new Nordic entrant finds a market already shaped, in part, by the presence of its peers – reducing perceived entry risk and shortening the time to operational effectiveness. These effects created a form of collective institutional legitimacy that could not be achieved by a single company.

Academic Background & Talent Pool

The academic ecosystem of the Tricity emerged across the study as one of the most consistently valued structural assets of the regional. The University of Gdansk, Gdansk University of Technology, the Maritime University of Gdynia, the Naval Academy, and the Polish--Japanese Academy of Information Technology together constitute an academic base, spanning technical, maritime, linguistic, and business disciplines in a combination that serves the specific needs of the Tricity's BSS mix. Furthermore, the universities' role has evolved throughout the time, from passive supplier to active partner. Nordea, Boeing, Lufthansa Systems, and Solidigm all maintain structured university relationships that go beyond graduate recruitment.
In some cases, the appearance of the companies with specific technical needs paved the way for certain skills to be created on the market. As an example – aeronautical knowledge did not exist in the Tricity when the centers were founded, but the maritime and cartographic foundations present in the academic ecosystem provided sufficient

adjacent expertise to create such skills. In rare cases, when the university base could not deliver what was needed – it delivered what was essential to build upon. That distinction certainly matters for investors evaluating specialist or highly technical operations.

Graduates emerging from the Tricity's academic institutions are technically proficient, and capable to overtake the complex processes. The common challenge across all cases is the increasing competition for senior and specialist profiles, particularly in IT and R&D. Such pressure is the direct consequence of the market's success and it's saturation with the companies having similar sourcing needs. The response to this challenge has itself become a differentiating feature of the Tricity's talent ecosystem. Rather than accepting the constraints of the available pool or constantly increasing the catchment area, established centers have invested in expanding it – through internship programs, reskilling initiatives, university partnerships that treat talent development as a long-term investment.

Business Clusters

The cluster effect – as the tendency for co-located organizations in related sectors to generate positive externalities for one another – is clearly visible on the Tricity example. The aviation cluster, anchored by Lufthansa Systems and Boeing did not emerge from a pre--existing aeronautical knowledge base – it was created by the investments efforts spanning almost three decades of presence on the market. It has since become self-sustaining, with each new entrant both contributing to and drawing from the accumulated expertise that the cluster has generated. The Nordic cluster operates similarly; each Scandinavian company that establishes operations in the Tricity contributes to the cultural and linguistic infrastructure that makes the market more attractive and more effective for the next entrant.
The maritime cluster, encompassing Hapag-Lloyd, DAMEN, and a range of specialist logistics operators, is grounded in the region's maritime heritage but has been modernized by the impact of the GBS sector into one that can serve global supply chains with excellent capability. In each case, the cluster itself is worth more than only sum of its parts as it creates a business legacy and incubates know-how which persists even if some of its elements decide to exit the market. Appearance of such cluster is a sign of the maturity of the market and it's depth, which is required to sustain such ecosystems.

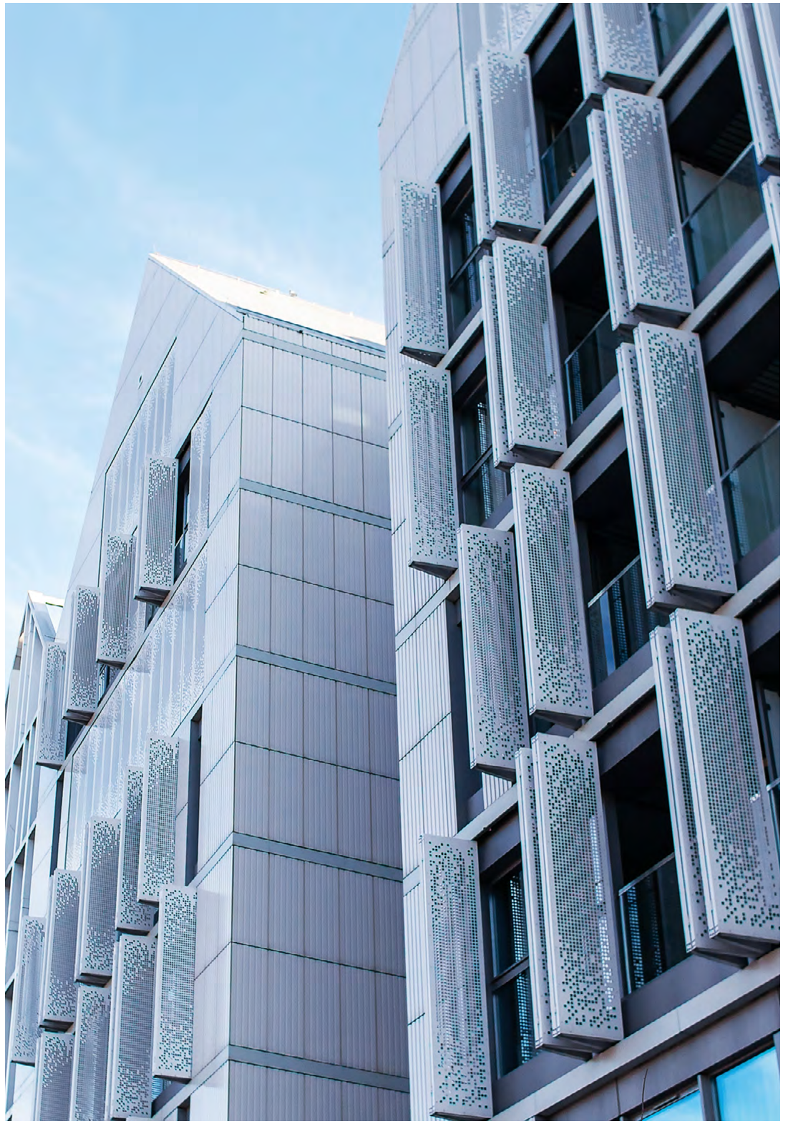
What's Next: The Forces Shaping the Tricity's Future

Cost Effectiveness and Knowledge Intensive Functions

The cost effectiveness equation for GBS operations in the Tricity – and in Poland more broadly – is in the process of recalibration that impacts centers at all stages of maturity. With the wage levels growth through the years, the era of pure labor arbitrage has passed. The organizations that established operations in the region primarily on cost-effectiveness grounds have long since had to find additional justifications for their presence. And the cases in the study reveal that they have found them – and not simply by resisting cost pressure. The key was to respond to it with functional upgrading, automation, and the development of higher-value service portfolios that generate returns justifying a higher cost base.

The organizations whose Tricity centers are most secure in their long-term futures are those that have made the transition from cost center to capability center; the evidence is visible in the fact that the Tricity's talent ecosystem and institutional infrastructure are well suited to support that transition. Cost effectiveness for the organizations is no longer measured in wage arbitrage but in the ratio of value delivered to total cost of operation – a metric on which a sophisticated, developed GBS operation in the Tricity compares favorably to less mature markets. While still cheaper than locations within Western European alternatives, they contain the operational effectiveness and sophistication which lower-cost locations cannot compete.

The functional evolution is not strictly a Tricity-specific phenomenon but rather the change slowly affecting Poland as a location for BSS sector. Shift from transactional processing toward expert, and strategically integrated roles is the direction of this sector as whole, in response to rising cost pressures. This direction is further accelerated by automation and AI adoption, supported by the progressive willingness of parent companies to entrust their most



complex processes to proven offshore and nearshore locations. What is Tricity-specific is the degree to which the region's centres are already advanced along this trajectory. Notable at first sight is the very high share of IT and R&D process in the general BSS mix of the region; these functions combined stand for around 70% of the total portfolio mix. Examples of such advancements can be found in cases analyzed in the previous chapters. The Risk Intelligence function at LSEG, the Boeing Defence Analytics team, the aeronautical knowledge base at Lufthansa Systems, and the semiconductor R&D capability at Solidigm or Intel – are operational highlights of the sector, delivering knowledge-intensive work of the highest complexity from within the Tricity's GBS ecosystem. As the whole sector moves in this direction, the region enters the next phase of development as a location that is already partially leading this transformation on a nationwide scale.

Both the study, and the broader market observation, collectively point toward a future in which the distinction between a GBS center and a strategic business unit becomes progressively less meaningful. The centers that have matured along the arc of sophisticated development are no longer support functions in any conventional sense. They evolved into core locations, that facilitate knowledge and process excellence in a way becoming expert platforms which contribute to their parent organizations well beyond the delivery of defined service outputs. Arla's Gdansk center leads group-wide business integrations. Boeing's Gdansk operation contributes to the aeronautical maps used by 20% flights globally. LSEG's Gdynia hub supports the infrastructure of global financial markets. These are not peripheral operations that happen to be located in the Tricity – they are central to the functioning of organizations that operate at a global scale, and their continued development will deepen rather than diminish that centrality. The trajectory points toward centers that are simultaneously more technologically sophisticated, more strategically integrated, and more genuinely irreplaceable within their parent structures than at any previous point in their histories.

AI and Automation

Within the GBS sector in particular, AI's impact is most visibly expressed in the progressive automation of

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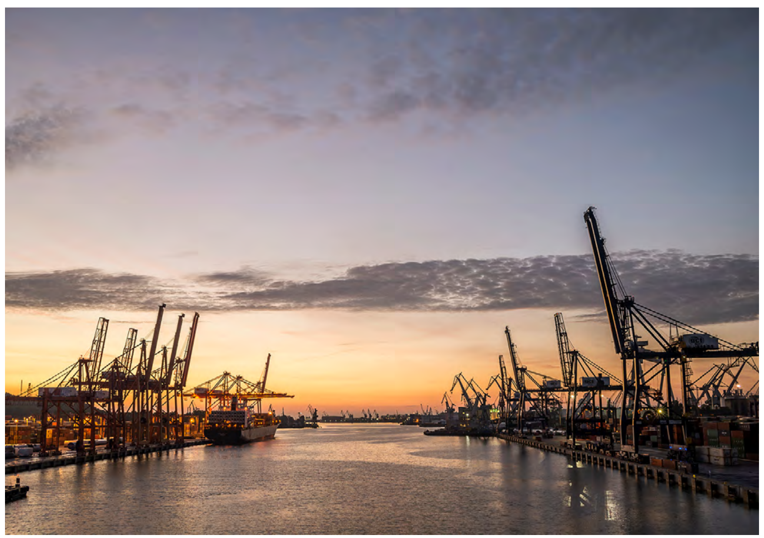
manual-heavy tasks – the very functions that formed the foundational layer of the shared services model in its earliest form. Invoice processing, data entry, basic compliance screening or first-line IT support, are among the most advanced areas of AI-driven automation. The displacement of human effort from these functions is already well underway across the most mature GBS operations globally. The World Economic Forum's 2025 Future of Jobs Report found that 40% of employers plan to reduce headcount in areas where AI can automate tasks. Such figure appears alarming but that must be understood in the context of the simultaneous expansion of demand for more complex functions that AI cannot perform. Analytical judgement, complex stakeholder management, creative problem-solving, ethical oversight – in summary, all kinds of contextual expertise that takes years of experience to develop in addition to key component – that of a human factor. The question is not whether AI will transform GBS roles but how quickly organizations can develop the human capabilities needed to operate in the new business environment. This implication is clearly visible in every analyzed case in the study; majority of companies identified



AI as significant force currently reshaping their operations. Notably, each of them, framed its impact in the same terms – as a tool that elevates human work rather than replaces it. Throughout strategies and visions statements shines a shared conviction that the appropriate response to AI is not workforce reduction but workforce transformation – moving people from transactional execution to supervisory, analytical, and creative roles that AI tools support but cannot perform. This consensus framing is itself a significant finding: it suggests that the centers most likely to thrive in the AI era are those, like the majority of the Tricity's established operations, that have already invested in the upskilling and reskilling infrastructure needed to make that transition manageable. The organizations that have spent years building university partnerships, internship pipelines, and structured development programs are better placed to navigate the AI transition than those that have treated talent as a commodity to be sourced rather than a capability to be cultivated.

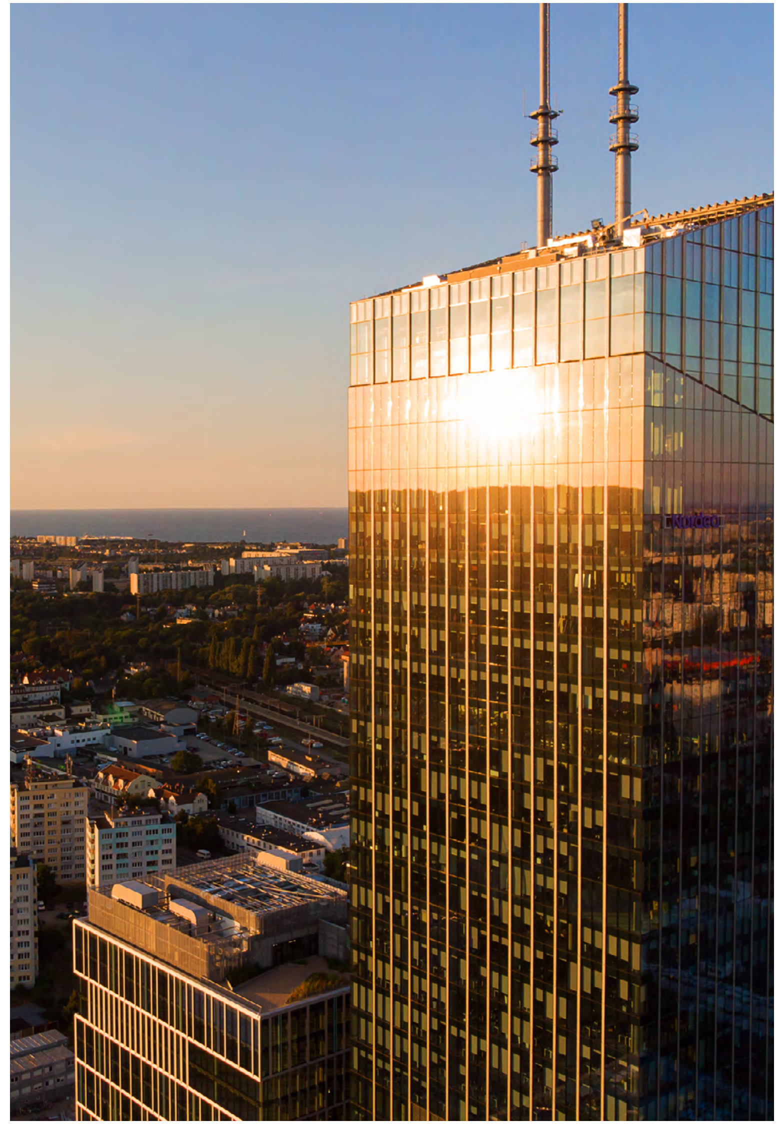
Geopolitical Impacts

The Russia-Ukraine war has impacted the influence of political geography on GBS location decisions in ways that are directly visible in the Tricity's investment pipeline. The shift toward nearshoring – the preference for EU-based service delivery over more distant alternatives – for years has reinforced Poland's position as a preferred destination for Western European investments. It has specifically benefited the Tricity's established Nordic and DACH investor communities, for whom the region's cultural and geographic proximity to their home markets was a valued feature. The emerging security agenda in the Baltic region in form of NATO's reinforced eastern flank and the accession of Finland and Sweden adds a further dimension to the Tricity's geopolitical. For GBS investors, geopolitical stability and alignment are becoming decision criteria of increasing weight alongside the traditional metrics of talent and cost – and the Tricity, within the EU, within NATO, and at the geographic heart of the Baltic security architecture, scores well on both. It has to be noted however, that alongside the decreased stability in the region, each long term investment decision, such as center establishment, will require careful evaluation and agility in managing the operations throughout geopolitical disruptions.

Future of Tricity as a BSS location

The Tricity enters this next phase of GBS development from a strong position. Its academic ecosystem continues to produce the technical and linguistic talent that the sector requires, and its university-business partnerships will sustain that supply as functional requirements evolve. Its cluster structures – in aviation, maritime logistics, financial security – are mature enough to be self-reinforcing and diverse enough to remain relevant. Its institutional infrastructure – Invest in Pomerania, the Pomeranian Special Economic Zone, the network of science and technology parks – is being actively developed, ensuring that the support framework available to investors scales with the ambitions of the sector it serves. And its geographic position – at the Baltic Sea, at the culturally and physically proximate gateway to Scandinavia – is a structural advantage whose value will only be constantly increasing.

What the cases examined in this report ultimately demonstrate is that the Tricity's GBS story is not yet fully written. The organizations that arrived twenty years ago to test a hypothesis about what a Baltic port city could deliver for global business have, over two decades of sustained investment and continuous development, answered that question more comprehensively than any of them anticipated. The answer they have provided – not in words but in the scale, sophistication, and strategic significance of what they have built – is the most compelling possible argument for the next generation of investors considering the same question. The Tricity is simply – not a place where global business services have been successfully delivered. It is a location where they have been consistently, and in many cases irreversibly elevated – and that elevation, compounding over time, is the foundation on which its future is being built.



Conclusion

The Tricity presents one of the most compelling and fully realized cases for a regional GBS hub in Poland. It's competitive proposition has been stress-tested across two decades of sustained developed, and in turn has yielded highly mature market, backed by strong business and academic environment. The region has also proven, through the operational experience of the organizations documented in this report, to be capable of supporting not just the establishment of GBS operations but their transformation into strategically significant nodes within global corporate structures.

This report set out to provide a comprehensive and evidence-based portrait of the Pomeranian Voivodeship and the Tricity as a GBS destination. The picture that emerges is of a region that has completed the foundational phase of its GBS journey and is now navigating the more demanding waters of market maturity.
The office market has crossed the one million square meter threshold and employment in the sector has grown from a few thousand pioneers to over 40,000 professionals across nearly 250 centers. The functional profile of those centers has evolved from transactional processing toward expert-level knowledge work, product development, and strategic management of processes that are global in scope and critical in nature. The Pomeranian Special Economic Zone continues to break investment records and the academic ecosystem continues to produce the talent on which the future of the sector depends.

For organizations evaluating the Tricity as a potential location for new or expanded GBS operations, this report provides the analytical depth needed to assess the region's competitive advantages. For those already present in the market, it offers a broader context of their own experience – the confirmation that the patterns they have observed within their own operations are not unique to their circumstances but structural features of a regional proposition. And for all readers, it opens a forward-looking conversation about what the convergence of AI adoption, and the growing premium on knowledge-intensive functions across the GBS sector. The Tricity's story is not approaching its conclusion. It is, in the most meaningful sense, only now reaching the altitude from which its most significant contributions will be made.

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