



City Office  
of Rzeszów

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# Destination Rzeszów

SPRING 2022



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I am delighted that you are about to read the latest report on the commercial real estate sector in Rzeszów. You will find the most up-to-date information about the economic potential of the city, trends in the local office and warehouse real estate market, and details about the rapidly developing residential market.

Over the past dozen years, Rzeszów has undergone enormous changes. Thanks to large investments in transport infrastructure, the city has become an easily accessible business destination, whose investment potential and economic advantages, as well as a well-developed accommodation base, attract entrepreneurs from all over the world.

Rzeszów is also a thriving academic centre attracting young people not only from the Podkarpackie region but from other regions of Poland and abroad. Potential investors have available to them a highly qualified workforce, ready to be employed in many innovative industries, such as information and communication technology, aviation, automotive, pharmaceuticals and packaging, in which the city and the special economic zones of the neighbouring municipalities specialise.

**I would like to cordially invite you to visit the capital of the Podkarpackie region and find out its enormous potential.**



**Konrad Fijolek**  
Mayor of the City of Rzeszów





# A look at the city

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## General information

Rzeszów is the largest city in south-eastern Poland, the capital of the Podkarpackie region and the centre of the Rzeszów Agglomeration. It is one of the leading industrial, business, academic and cultural centres of Eastern Poland and a nationally important centre for innovation, research & development and modern technology. Rzeszów is a rapidly developing centre for advanced technology in the aviation industry in Central and Eastern Europe. Key sectors of the local economy include aviation, IT, chemical processing, pharmaceuticals, construction, modern business services as well as transport and logistics.

The city is an active member of the EUROCITIES Association, the Union of Polish Metropolises and the Association of Polish Cities. It maintains close and wide-ranging cooperation with 15 twinned cities in Europe, North America and Asia.

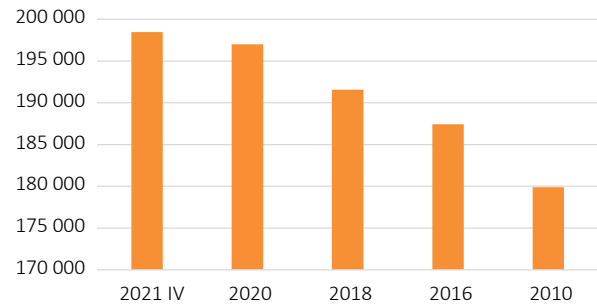
What is particularly important, Rzeszów is one of the cleanest, safest and greenest regional capitals in Poland.

The city currently has a population of over 220,000 people. In the past 20 years, Rzeszów has seen its population rise steadily. It is one of the few Polish cities that has a constantly increasing population. The chart on the right shows the increase in Rzeszów's population at the end of each year.

According to demographic analyses carried out by the University of Łódź, Warsaw and Rzeszów will be the only Polish urban agglomerations to record significant population growth in the period up to 2050.



## Population growth in years 2010 - 2021



source: City Office of Rzeszów

Rzeszów is also the leader when it comes to regional capital cities in Poland in terms of natural population increase, which reached 3.3 at the end of 2019, with a rate of 11.5 live births per thousand inhabitants.



Rzeszów, source: City Office of Rzeszów



# Location

Rzeszów is the capital of the Podkarpackie region, which forms the eastern border of the European Union. The border crossings with Ukraine (to the east) and Slovakia (to the south) are within 90 km of the city. The A4 motorway, connecting Western Europe with Ukraine, as well as the S19 expressway, constituting the national section of the Via Carpatia international north-south route, run through the city. National roads no. 9, 19 and 94 also run through Rzeszów. The E30 international railway line, which is of considerable economic importance, runs along the northern edge of the city.

Rzeszów-Jasionka International Airport is located 6 km from Rzeszów. The airport offers direct passenger connections to major European cities, the United States and Warsaw, as well as attractive seasonal tourist destinations. As a CARGO handling agent, the airport offers a comprehensive service for air cargo. In addition, it has a Phytosanitary Clearance Point for the international air transfer of plant-based products.

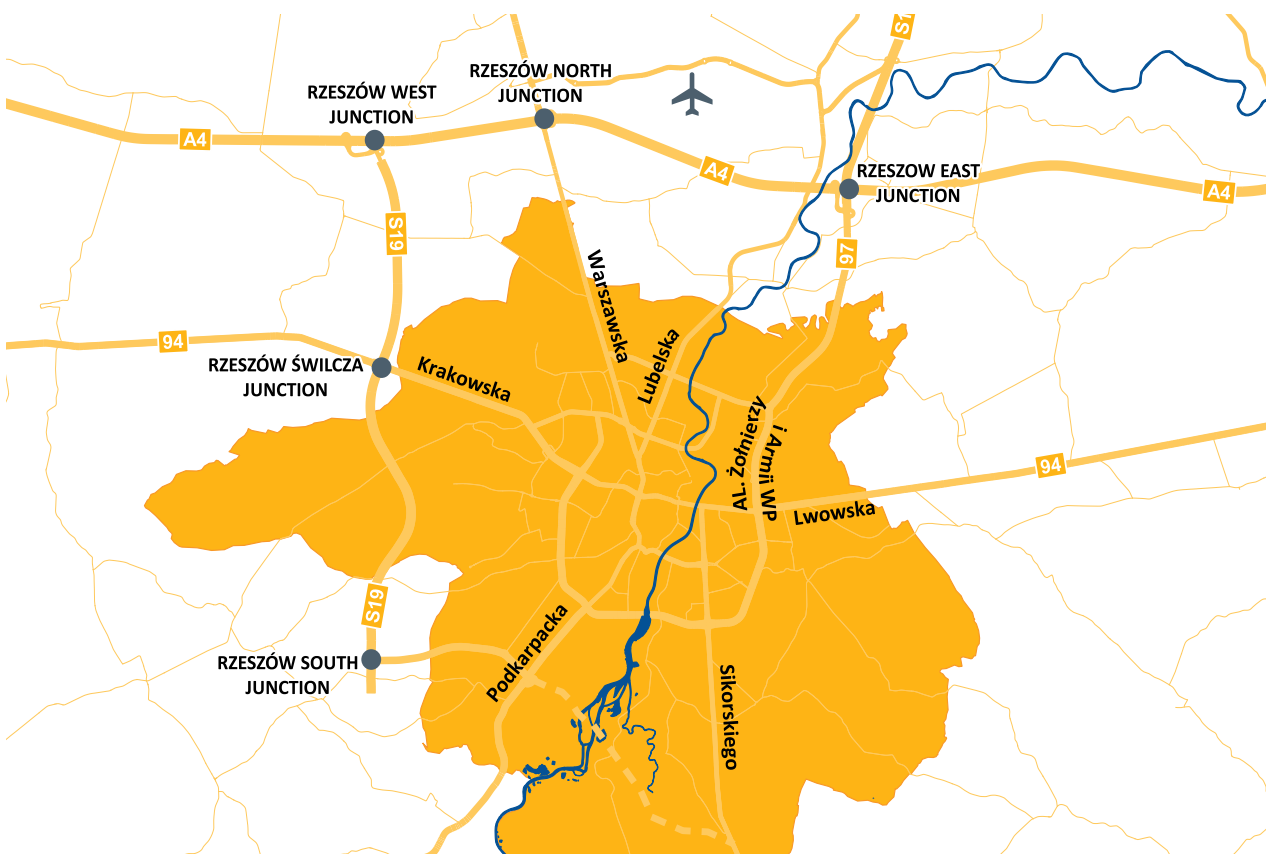


## City distances

Kraków	168 km
Warszawa	296 km
Katowice	246 km
Łódź	313 km
Wrocław	437 km
Poznań	615 km
Gdańsk	665 km
Bratislava	527 km
Prague	647 km
Lviv	172 km
Kyiv	708 km
Budapest	456 km
Vilnius	772 km
Berlin	763 km

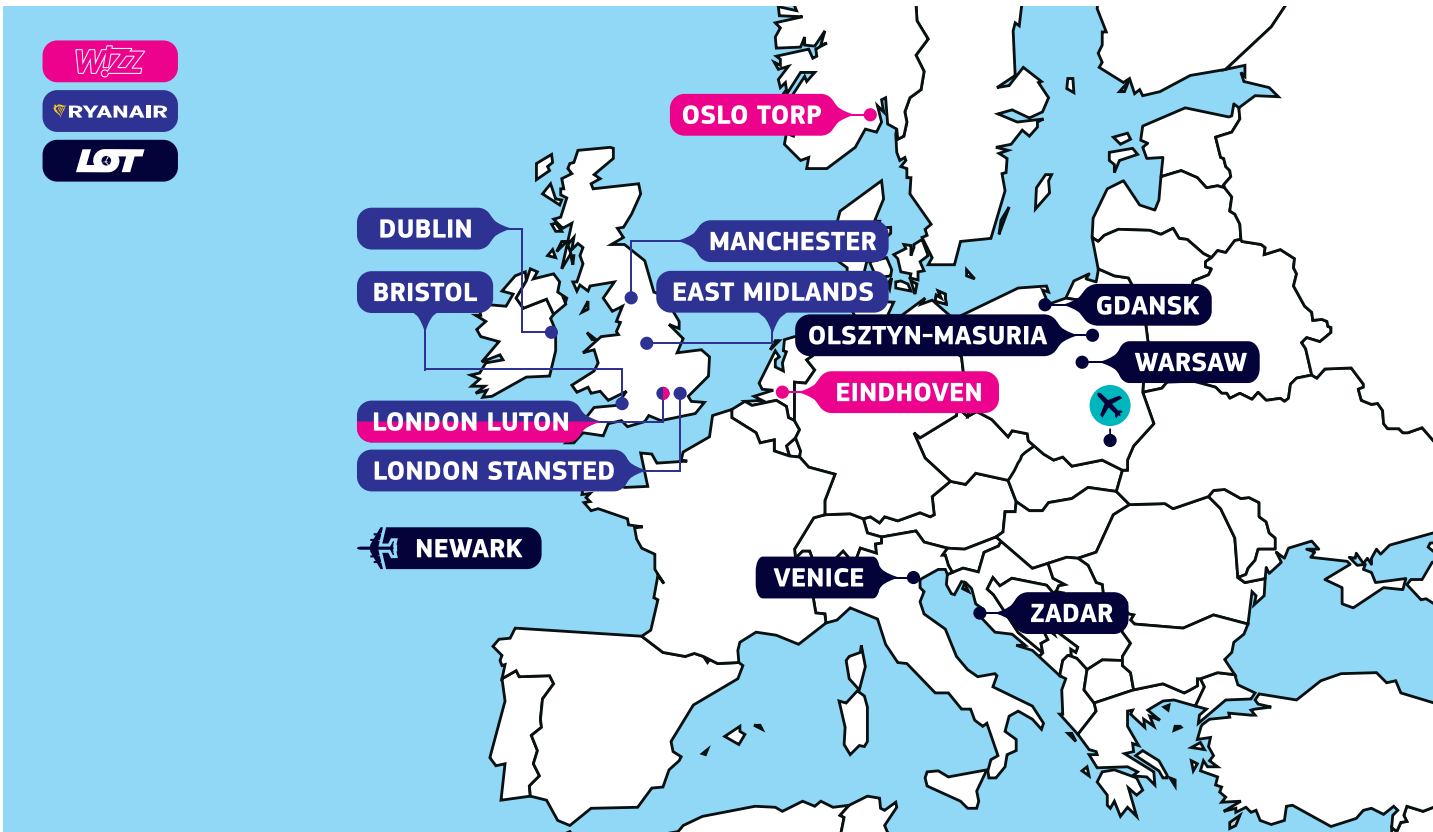


## Road map



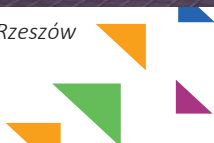


## Flight connections map



Rzeszów-Masuria International Airport

source: City Office of Rzeszów



# Economic potential

Rzeszów is one of the strongest economic centres in Eastern Poland. At the end of 2021, there were 32,466 businesses in the city, 992 of which were companies with foreign capital.

## Aviation

The Rzeszów agglomeration is the most rapidly developing advanced technology centre for the aviation industry in Central Europe. The city is home to one of the largest clusters in Poland – the Key National Cluster Aviation Valley. The most important company operating in the aviation sector and the largest employer in Rzeszów is Pratt & Whitney Rzeszów. The company manufactures subassemblies and components for aircraft engines, as well as complete aircraft engines. Pratt & Whitney has an ultra-modern research and development centre in Rzeszów. Hamilton Sundstrand Poland, in turn, is a leader in the design, manufacture and repair of Auxiliary Power Units (APUs). The Podkarpackie Science and Technology Park is home to large plants of globally recognised aviation companies, including MTU AeroEngines, EME Aero, Collins Aerospace, McBairda, MB Aerospace, Heli-One, and LINETECH.

## IT

Information technology is one of the leading branches of the local economy. The capital of Podkarpackie region is home to the headquarters of well-known and internationally recognised companies from the IT sector: ASSECO Poland – one of the largest and most dynamically developing companies in this sector in Europe, which has recently opened the Asseco Innovation Hub, an ultra-modern research and development centre; and SoftSystem – an enterprise engaged in the creation and maintenance of laboratory information systems and integration services for US and Canadian medical centres. G2A.Com, a dynamically growing global sales platform operating in the gaming sector, also has a large research and development centre. Other leading IT companies in Rzeszów include PGS Software, SII Polska, Ailleron, IDEO, OPTTEAM, MOBICA Ltd, ZETO Rzeszów, COMARCH, Concise Software, Amsterdam Standard, JCommerce, ATOS and Sagitum.

## Modern business services

The modern business services sector is developing in Rzeszów. The sector currently employs around 6,000 people. The most important companies from the BSS sector in Rzeszów include Deloitte Business Services Centre for Central Europe, Pratt & Whitney Financial Services Centre, Carlson Wagonlit Travel, Pracuj.pl Group, Polskie e-Płatności Financial Services Centre, Aluteam-Alumeco Shared Services Centre, Unicall Communication Group Poland, PKO BP Customer Service, as well as numerous R&D centres.

## Automotive

In the Rzeszów region there are several global companies operating in the automotive sector. The largest of these is Borg Warner, which has a powerful production complex in Tajęcina near Rzeszów, as well as a modern R&D centre. More than 2,000 people are employed at the Borg Warner Complex.



# 4.9%

Unemployment rate



# 645

New companies registered in Rzeszów (2021)



# 131

New companies with foreign capital registered in Rzeszów (2021)



# 5,777

Average monthly gross salary in the enterprise sector (PLN)





**Intelligent Local Station**, source: *City Office of Rzeszów*

Another well-known company is Phoenix Contact E-Mobility, which in 2021 launched a state-of-the-art production facility in Rzeszów, producing components for electric vehicle charging. BURY Technologies, which is known for the production of car navigation and communication systems, has an R&D centre in Rzeszów. TEKNIA in turn manufactures tanks, filters, switches and a wide range of other components for use in the automotive sector.

### **Plastics processing**

The chemical industry is also developing very well in the Rzeszów subregion. The most well-known companies that have established their presence on the Polish and European market include Marma Polskie Folie, Polimarky, Greinplast, Polkemic, Dipol Plastic Technology, Efekt-Plus and Yanko.

### **Pharmaceuticals**

Well-known and globally recognised pharmaceutical companies also have large production facilities in Rzeszów. These include BAUSCH Health and SANOFI - Aventis.



# Investment areas

## Rzeszów-Dworzysko Economic Activity Zone



**Lisi Aerospace Creuzet Polska**, source: City Office of Rzeszów

In the north-western part of Rzeszów, the Rzeszów-Dworzysko Economic Activity Zone is located. It includes the Rzeszów-Dworzysko Science and Technology Park managed by the Powiat Office of Rzeszów, as well as investment areas located in the western part of the zone. The Economic Activity Zone includes industrial land that has infrastructure and telecommunication facilities, as well as excellent transport connections. The zone is located in the immediate vicinity of the S19 expressway and the A4 motorway and is only 6 km from Rzeszów Jasionka International Airport. Companies that have invested in the zone include: Lisi Aerospace Creuzet Polska (aviation industry), TW Metals (metallurgy), Phoenix Contact E-Mobility (electromobility), UNIMET (tooling), DB Schenker (logistics), Linde Material Handling (electromechanics), Efekt Plus (chemical processing), Vissavi (textiles), Raben Logistics Polska (logistics), Heating Instgaz (gas), Sobiesław Zasada Automotive (automotive), Scania (automotive), 7R (logistics), Konsorcjum Stali (steel), BOWIM Podkarpacie (steel), the biggest Harley Davidson showroom in Central and Eastern Europe and many other enterprises.

Companies that decide to invest in Rzeszów can count on high income tax exemptions. The amount of tax exemption for new investments or the creation of new jobs is 50% of the investment expenditures or two years of labour costs of newly employed workers for large enterprises, 60% for medium-sized enterprises and 70% for small enterprises. In addition, businesses can benefit from exemption from real estate tax and tax on means of transport (trucks, tractors, trailers and semi-trailers, buses) for up to 5 years, in line with a resolution passed by City Office of Rzeszów on 22 February 2022.



**BorgWarner complex**, source: City Office of Rzeszów

## Podkarpackie Science and Technology Park AEROPOLIS

In order to implement innovative technologies, the Podkarpackie Science and Technology Park was established in 2006. It is situated on the edge of Rzeszów, directly by Rzeszów Jasionka International Airport, in the vicinity of the A4 motorway and the S19 expressway. Within the Park there are 3 investment zones with a total area of 166 ha: S1, S2 and S1-3. Over 50 companies have so far invested in the park, employing nearly 6,600 people.

The leading enterprises operating in the park include:  
 MTU AeroEngines Poland – a leading manufacturer of aircraft engine components and propulsion subassemblies for civil aviation, which apart from production activity, carries out technologically advanced R&D;  
 BorgWarner Poland – part of BorgWarner Inc. – a world leader in the production of turbochargers and drive systems for the global automotive industry;  
 EME Aero – a joint project of the aviation giants Lufthansa Technik AG and MTU AeroEngines, which is one of the largest MRO service centres in Poland offering maintenance, repair and comprehensive servicing of turbofan engines;  
 FIBRAIN – an innovative Polish manufacturer and global provider in the field of ICT systems and fibre optic telecommunications;  
 Heli-One Polska – a company belonging to the international corporation CHC Helicopter, engaged in the comprehensive repair and maintenance of helicopters;



# 2,000

employment in the Rzeszów-Dworzysko Economic Activity Zone



# 150 ha

investment areas



# 6,592

employment in PPN-T  
Aeropolis companies



# 166 ha

investment areas

Collins Aerospace – part of United Technologies Corporation, an aerospace company specialising in the production of parts, components and landing gear for civil and military aircraft for companies such as Boeing, Airbus, Bombardier and Lockheed Martin;

Cyfrowa Foto - the largest digital printing house in Central and Eastern Europe, the national leader in digital and photo printing;

B/S/H Domestic Appliances - manufacturer of small domestic appliances of brands such as Bosch and Siemens;  
BODYCOTE – global provider of subcontracted heat treatment services for the aerospace, energy, defence and automotive sectors;

MB Aerospace Technologies – a company specialising in the production of aircraft engine components and high-tech special processes with applications in aviation and other high-tech industries;

ML-SYSTEM – a Polish innovative enterprise, operating in the Renewable Energy Sources industry and focusing on the design and production of integrated systems based on photovoltaic technology;

Panattoni Park Rzeszów – a large logistics park offering over 46,000 m<sup>2</sup> of modern warehouse space of the highest standard, and many other companies.

The AEROPOLIS Technology Incubator is an integral part of the park, and its main task is to create a space for micro, small and medium-sized enterprises, especially for those operating in aviation, IT, electro-mechanics, biotechnology and chemicals.



ML System S.A., source: City Office of Rzeszów



# Head offices of innovation clusters

In Rzeszów, there are many innovative clusters and branch associations that bring together leading technology companies in the region. Among the most important of these are:

## Aviation Valley - Association of Aviation Industry Entrepreneurs



Aviation Valley is one of the biggest and most dynamically developing clusters in Poland, bringing together nearly 180 businesses involved in the aviation sector. The cluster creates favourable conditions for the development of aviation companies in the region, organises and develops a cost-effective chain of suppliers, and promotes the Polish aviation industry. Companies associated with the Aviation Valley employ 32,000 highly specialised staff. The most important members of the cluster are global aerospace companies, which include Pratt&Whitney, MTU AeroEngines, Hamilton Sundstrand, EME Aero, MB Aerospace, Heli-One, Lisi Aerospace, Mc Braida Polska, Collins Aerospace and SAFRAN.

implementation (organisational or process), development of sustainable technologies and human capital. POLIGEN brings together 34 companies, which employ nearly 2,200 people.

## Unmanned Systems Cluster



This brings together more than a dozen companies from the region involved in the development of unmanned aerial systems. The cluster aims to create a multifaceted platform for cooperation between entrepreneurs, R&D units, business environment institutions, local government units and NGOs. The main goal of the cluster is to develop new and innovative technologies in unmanned systems.

## Podkarpackie Informatics Association



The main aim of the Eastern Poland IT Companies Cluster is to integrate IT and telecommunication entrepreneurs and support the development of entrepreneurship and business initiatives as well as increase the ICT knowledge of the society. The Podkarpackie Informatics Association manages the IT Cluster, which consists of 82 IT companies and 10 business support institutions from 5 voivodships of Eastern Poland.

## Technology in Medicine Cluster - TECHNOMED



This cluster focuses on the development of medical research, innovative solutions and techniques in computer-aided diagnosis, as well as the design and manufacture of systems supporting medical processes.

## Podkarpackie Renewable Energy Cluster



This cluster focuses on developing, analysing and implementing innovative solutions in the field of renewable energy. It integrates institutions involved in the development of the renewable energy sector, such as universities, businesses, start-ups and local authorities. The cluster has been operating in Rzeszów since 2011 and has over 100 members.

## POLIGEN Plastics Processing Cluster



The aim of the cluster is to create an effective innovation system supporting cooperation of its partners in terms of growth in competitiveness, innovative product



SkyRes, source: City Office of Rzeszów



# Innovative city services - Rzeszów Smart City

Rzeszów is an example of a city that has been consistently implementing SMART solutions in its urban ecosystem for many years, thus improving the lives of its residents.

The capital of Podkarpackie region is one of only two Polish cities to have a pioneering nationwide model of cooperation between inhabitants, experts and representatives of city authorities, which goes under the name Urban Lab. Urban Lab Rzeszów is a creative space where innovative solutions improving the quality of life of inhabitants are developed, tested and implemented – in line with the Smart City idea. The Urban Lab hosts numerous programming hackathons for children and young people, as well as thematic meetings with representatives of social organisations, Rzeszow universities, business and start-ups.

Rzeszów was the first city in Poland to install smart bus shelters. Innovative shelters using photovoltaic cells have many additional functions: from heating in winter and cooling in summer and smart lighting control, to inductive and traditional charging of mobile devices, the display of variable content on glass integrated into the shelters and the possibility of using an AED defibrillator.

In 2018, the Innovative Education project was launched. Its main objective was to improve the conditions and way of teaching for students and teachers by introducing modern IT solutions. Teachers and students in state schools in Rzeszów (about 30,000 students and 3,600 teachers from nearly 100 schools) gained free access to Microsoft Office 365 in the cloud and the right to install the latest Microsoft Office packages on 5 computers, 5 tablets and 5 smartphones. Thanks to the project, Rzeszów was one of the first cities in Poland to be prepared for distance learning during the COVID-19 pandemic.

One of the most important projects carried out in Rzeszów in recent years was the Construction of the System Integrating Public Transport of the City of Rzeszów and the Surrounding Area in 2007-2015, which saw more than PLN 400 million being invested. The project included the reconstruction and extension of Rzeszów's local transport system, the purchase of a fleet of modern and environmentally friendly buses and the development and launch of the Rzeszów Intelligent Transport System. In order to improve the functioning of public transport, the local transport system was rebuilt together with the accompanying infrastructure. Ultra-modern systems were created, including area traffic control, public transport management, passenger information, and electronic toll collection.

At the moment, under the financial perspective 2014-2020 the project will continue with the Rzeszów city authorities allocating nearly PLN 600 million for the development of the Rzeszów Transport Programme, of which co-financing from the European Union funds from the European Regional Development Fund under the Operational Programme Eastern Poland alone will amount to nearly PLN 400 million.



Urban Lab, source: City Office of Rzeszów



Urban Lab, source: City Office of Rzeszów



Innovative bus shelter, source: City Office of Rzeszów




Investments will be made in 3 projects:

1. development of the public transport system in Rzeszów
2. integration of different forms of public transport in Rzeszów
3. expansion of the public transport system in Rzeszów

An excellent example of the SMART concept in Rzeszow is the opening of the innovative local bus station complex serving international connections. This intelligent and fully ecological building is equipped with an air conditioning system that automatically adjusts to the weather conditions outside.

Bus shelters equipped with photovoltaic systems were installed next to the station building, as well as driveways and a parking area for buses. Heating and cooling of the building, the station lighting and the operation of all electronic and IT systems are provided by heat pumps driven by electricity produced by NoFrost technology modules on the canopies. For the first time in Poland, an innovative ventilated façade that generates electricity was used.

## Smart Mobility



24	electric vehicle charging stations
38	charging points
30	number of motor scooters
220	number of electric scooters
100	number of city bikes
20	number of electric bikes



Center for Area Traffic Control System, source: City Office of Rzeszów

# Quality of Life

Rzeszów boasts a wide range of cultural institutions – cinemas, theatres, museums, art and photography galleries, a network of community centres and libraries.

The city regularly hosts interesting events of both local and international scope, which are very popular among local people. Around 550 cultural events are held there every year.

One of the city's biggest cultural attractions are the Rzeszów Cellars, located under the market square. The cellars are an interactive cultural institution that uses innovative techniques to show the city's wide-ranging history in a modern form.

European Stadium of Culture is the most important cultural event organised in Rzeszów and has been held since 2011. Since 2013, it has taken place in a new formula under the project East of Culture, organised by three cities: Rzeszów, Lublin, Białystok. Around 40 diverse events take place every year, including concerts, exhibitions, performances, film screenings, workshops and talks by authors. During the main concert in recent years, Rzeszów has been visited by White Lies, Within Temptation, Guano Apes, The Fratellis, Fink, Dean Brown, The Kooks, Coma and many other well-known artists.

The World Festival of Polish Folk Groups, which has taken place in the city once every three years since 1969, has become a permanent feature on Rzeszów's cultural scene. The festival attracts folk groups from all over the world. Another important event is the Rzeszów Carpathia Festival, which has been organised since 2005 and sees young singers and musicians show off their talents. The festival has been a springboard to success for many young artists.



## Public utility buildings in Rzeszów

9	theatres
13	museums
10	art galleries
5	cinemas
47	festivals
11	shopping malls
320	restaurants



Cellars in Rzeszów, source: City Office of Rzeszów





**European Stadium of Culture**, source: *City Office of Rzeszów*

Other cyclical cultural events which enjoy great popularity among Rzeszów residents include: Rzeszów Jazz Festival, Paniaga Festival, Reggae by Wisłok, the Organ and Chamber Music Festival, New Theatre Festival - Rzeszów Theatre Meetings, Rock Night, and the bRZEg Miasta Festival.

Rzeszów offers a wide range of restaurants, pubs and nightlife venues. Romantic cafes in the Rzeszów market square are particularly tempting in the summer, when concerts are held on the open-air stage every weekend, and in the spring and summer season when multimedia fountain shows are held. The town's residents enjoy numerous tennis and squash courts, modern and well-equipped spa centres, a karting track as well as golf courses and paintball ranges. Equestrian centres, rope parks, trampoline parks and roller skating are also hugely popular. A constantly expanding network of cycle paths, which is currently almost 180 km long, is available.

Rzeszów is also one of the greenest regional capital in Poland, with green areas occupying more than 2,100 hectares, accounting for 17.2% of the city's total area. There are 12 municipal parks in the city. The most popular are Olszynki stretching along the Wisłok river, and the Lisia Góra Nature Reserve, which is full of attractions for children and adults.

The city also hosts large sporting events, including: the Rzeszów Marathon and Half Marathon, the Rzeszów Rally, Tour de Pologne, the Podkarpacki Ultramarathon, the Rzeszów Streetball Challenge and the Rzeszów Bike Festival.





# Human potential



Academic potential

19

Human capital

22

# Academic potential

Rzeszów is one of the largest academic centres in Eastern Poland. There are 6 universities in the city (2 public and 4 non-public), with nearly 40,000 students. Rzeszów is one of the three Polish cities with the highest percentage of people with higher education (after Warsaw and Krakow). As many as 40% of people in Rzeszów have completed higher education.

## Rzeszów University of Technology

The oldest and largest technical university in south-eastern Poland, Rzeszów University of Technology has over 11,000 students in 7 faculties. It is the first technical university in Poland to have a faculty for civil aviation pilots. The university offers innovative courses in aviation and aerospace, automation and robotics, medical engineering, computer science, biotechnology, electromobility, mechatronics, finance and accounting, mechanical engineering and many other subjects. Rzeszów University of Technology is a renowned research centre that cooperates with a number of institutions in Poland and around the world. It has at its disposal modern infrastructure and laboratories, often unique not only in Poland, but also in the world, which allow complex research to be carried out for industry. The university maintains close research and development links with the most innovative enterprises operating in the region (e.g., Pratt&Whitney, G2A.COM, MTU AeroEngines Poland, Safran Aircraft Engines Poland, Polska Grupa Gazownictwa, Phoenix Contact E-Mobility, BURY Technologies).



Rzeszów University of Technology, source: City Office of Rzeszów



### Universities in Rzeszów



#### Public universities

Rzeszów University of Technology

University of Rzeszów

#### Private universities

University of Information Technology and Management

WSPiA University of Rzeszów

Rzeszów School of Engineering and Economics

Collegium Humanum - Warsaw Management University



# 40,000

students



# 12,000

graduates



# 2,056

foreign students (2020)



## University of Rzeszów

The largest public university in south-eastern Poland, with 17,000 students in the 2020/2021 academic year. The university is organised into 4 colleges, which offer nearly 60 diverse courses. Rzeszów University also has a new and well-equipped campus. The most popular faculties among students are law, medicine, economics, English philology, computer science and management. The university cooperates with around 300 partner universities from around the world, including 54 from Ukraine, and 200 through the Erasmus+ programme.

## University of Information Technology and Management

The university has for many years occupied leading positions in the national rankings of non-public higher education institutions in Poland. It offers 18 first- and second-level study programmes in Polish, 13 programmes in English, as well as postgraduate and doctoral studies. In the 2020/2021 academic year, more than 6,000 students studied at the university. Courses most popular with students include computer science, programming, computer game design, finance and accounting, cyber security, English philology and aviation management.

## WSPiA University of Rzeszów

As one of the largest non-public universities in Poland, it offers courses in law, administration, management and internal security and is authorised to confer Doctor of Law degrees. It has a modern Centre of Forensic Science, Criminology and Forensic Medicine, a well-equipped electronic shooting range, as well as a beautiful, modern campus in the centre of Rzeszów.

## Rzeszów School of Engineering and Economics

This university that has been operating in Rzeszów since 2000. It offers interesting courses such as: geodesy and cartography, spatial planning and management, photogrammetry and remote sensing and customs agent studies.

## Collegium Humanum - Warsaw Management University

The Rzeszow branch of the university has been operating since 2019. It offers courses that include psychology and education (several specialisations), as well as a number of postgraduate and Executive MBA studies.



University of Rzeszów, source: City Office of Rzeszów



**G2A.COM** is a global company with operations around the world. Our head office is in Hong Kong, we have an office in Amsterdam and research and development centres in Warsaw, Krakow and in Rzeszow. Despite such a wide range, Rzeszów is one of the most attractive locations for our employees.

It is not a coincidence that we chose Rzeszów for our largest R&D centre. The large academic base makes it easier for us to recruit the best talent. Modern infrastructure - including Rzeszów-Jasionka Airport - means quick transport and access to the largest communication centres in the world. But it is also worth noting other advantages of the city - lots of greenery and culture and many tourist attractions.

I confidently recommend Rzeszów to everyone - it is a great place to do business.



**Bartosz Skwarczek**  
CEO G2A.Com



# Human capital

Rzeszów, as the capital of Podkarpackie region, is an excellent location for both modern business services, logistics centres and production plants using innovative technologies. There are more than 32,000 businesses in the city, with the labour market in the region primarily dominated by the aerospace, the electrical and electronics sectors, manufacturers of new technologies, IT companies, and chemicals and pharmaceuticals, which form a stable basis for employment in the province.

The labour market in Podkarpackie region, as in other regions, is changing and in recent years it has seen growing demand for skilled workers, with a simultaneous low availability of specialists ready to work immediately. This is confirmed by the continuing high demand for engineers and technicians. Therefore, in order to ensure that the teams do not lack appropriate qualifications, it is worth providing specialists with good working conditions (apart from appropriately high salaries, social conditions and bonus systems are also important), which may help retain staff and also attract professionals to Rzeszów and the region.

The Labour Market Monitor survey carried out by the Randstad Research Institute shows that employee turnover is on the rise. The data shows that 22% of respondents changed their place of employment during a six-month period (an increase of 3 percentage points). The most common reasons were a desire for professional development (44%), as well as sustainable employment conditions. Placing candidate availability against macroeconomic factors such as inflation and tax changes, employers in the region may see a further increase in salary expectations from employees and candidates in the short term. All the more so as survey data shows that more than half of employees did not receive a pay rise last year and a quarter are dissatisfied with their pay. Employers in the region should pay attention to this when putting together salary and benefits packages.

Podkarpackie region is a dynamically developing labour market and in the coming years we expect even greater demand for employees in production and logistics. Jobs will be offered that demand greater professional experience in production automation, as well as specialist qualifications, for example in forklift operation and electrical work. In the ranking Europolis - Cities for the Young published by the Robert Schuman Foundation, Rzeszów stands out for its very high level of education, and it is this potential that should be exploited both by companies already present in the region and by new investors. To further ensure the development, especially required engineering and technical skills, companies should cooperate with universities, for example with Rzeszów University of Technology and technical schools, which will help to strengthen competences and ensure the supply of specialists in the region.

Rzeszów is also developing rapidly in modern business services and is ranked among the top ten centres in Poland. Employees who can demonstrate knowledge of digital tools and modern business solutions are most in demand in this sector. Staff in this sector also need to be able to navigate their way in a rapidly evolving world and keep up to date with digital transformation. In addition, it is important not only to know English, which is a natural consequence of the globalisation of services, but additional languages as well.



# 44%

share of people, who changed jobs due to the desire for professional development

source: Adobe Stock

Podkarpackie region, due to its location, attracts workers from nearby countries, but it is also an attractive destination for talent from more distant places. For many of them, economic cooperation with other European Union countries – Slovakia, Romania or Hungary – may prove attractive. In the report “Europolis - Cities for the Young”, Rzeszów’s strongest assets are its infrastructure investments, its rich cultural and entertainment offer and the rapid development of mobility (e.g., the country’s most modern fourth-generation urban bicycle system). According to the general classification of the Arcadis Ranking of Polish Sustainable Cities, Rzeszów is among the leaders on the list of the 50 largest cities in the country. Continuous investment in modern infrastructure that is resident and environmentally friendly is also a significant magnet for young Europeans who increasingly value sustainable development.



source: Adobe Stock



### Salaries in the warehouse and industrial sector (gross, PLN)



PRODUCTION	minimum/optimum/maximum
Manager	7,000/12,000/17,000
Master	6,500/8,000/10,000
Foreman	5,000/6,500/8,000
Worker	3,200/3,400/3,600
LOGISTICS	minimum/optimum/maximum
Manager	12,000/15,000/19,000
Expert	6,000/8,000/10,000
Worker	4,000/4,200/4,600
QUALITY	minimum/optimum/maximum
Manager	11,000/16,000/20,000
Manual worker (forklift operator)	3,200/3,300/3,600
WAREHOUSE	minimum/optimum/maximum
Manager	8,000/11,000/13,000
Worker	3,400/3,600/4,000





## Salaries in the office sector (gross, PLN)

<b>F&amp;A gl</b>	minimum/optimum/maximum
Junior Accountant	4,500/5,000/5,500
Accountant	5,500/7,000/8,800
Senior Accountant	7,500/8,500/9,500
Team Leader (5-15 people)	9,500/12,000/14,500
Manager (up to 50 people)	14,500/18,000/22,500
<b>F&amp;A: ap/ar</b>	minimum/optimum/maximum
Junior Accountant	4,500/5,000/5,500
Accountant	5,500/7,000/8,800
Senior Accountant	7,500/8,500/9,500
Team Leader (5-15 people)	9,500/12,000/14,500
Manager (up to 50 people)	13,000/16,000/20,000
<b>IT</b>	minimum/optimum/maximum
1st Line Support	5,000/6,000/6,500
2nd Line Support	6,500/7,200/8,000
3rd Line Support	8,000/9,000/10,000
IT Admin	8,000/10,000/12,000
Network/Security	9,000/12,000/15,000
Business/Sys Analyst	9,000/12,500/16,000
Developer	10,000/14,000/18,000
Tester	6,000/8,000/10,000
Team Leader (5-15 people)	8,000/10,500/13,000
Project Manager (up to 50 people)	13,000/19,000/25,000
<b>CUSTOMER SERVICE</b>	minimum/optimum/maximum
Junior Specialist	4,000/4,800/5,500
Specialist	5,000/6,000/7,000
Senior Specialist	6,500/7,300/8,000
Team Leader (5-15 people)	8,000/10,000/12,000
Manager (up to 50 people)	12,000/13,000/14,000
<b>R&amp;D</b>	minimum/optimum/maximum
Laboratory Specialist	4,500/7,000/9,500
Technologist	6,000/9,000/12,000
Design Engineer	6,000/9,000/12,000
Product Development	6,000/8,000/10,000
Senior Product Development	7,000/10,000/12,000
Quality Engineer	13,000/18,000/22,000
R&D Manager	15,000/20,000/25,000

**F&A** - Finance and Accounting, **AP** - Accounts Payable, **AR** - Accounts Receivable, **GL** - General Ledger,

source: Randstad

**HR** - Human Resources, **IT** - Information Technology, **CS** - Customer Service, **R&D** - Research & Development.





*Rzeszów is a market with huge potential for employers. It is home to highly regarded academic centres such as my Alma Mater Rzeszów University of Technology, the University of Rzeszów and other universities specialising in IT and engineering. It is also a great place to live and develop your career. Apart from many green areas and an abundance of culture, an advantage of our city is its proximity to an airport offering domestic and international flights.*

*Rzeszów is a city full of opportunities. The Rzeszów branch of Sii carries out projects for clients from many sectors, including aviation, aerospace, automotive, chemicals and pharmaceuticals, runs projects in web and mobile technologies, Java, .NET and C/C++/Embedded and implements Business Intelligence systems, the Office 365 platform, Dynamics 365 and Salesforce. Failure to exploit this potential would be a clear loss for us.*



**Tomasz Eberbach**  
Director of Sii Polska - Rzeszów Branch





# Real estate market

Retail market	27
Office market	30
Warehouse market	33
Residential market	35
Hotel market	38

# Retail market



# 228,600

Stock of modern retail space (m<sup>2</sup>)

Rzeszów is the capital and largest city of the Podkarpackie region. According to Statistics Poland data, the population in mid-2021 was 198,476. The purchasing power per capita is PLN 40,849 per year. As the main centre in the province, the Rzeszow market serves the entire region's population. The retail market in Rzeszów is also influenced by foreign customers. This is due to its attractive location at the intersection of major transport routes leading towards the borders with Ukraine and Slovakia.

The market for shopping centres in Rzeszów started to develop as early as in the 1980s. At that time, the first facilities built by local entrepreneurs - CH Europa II and Ameryka - were established. Retail also developed in the city in the form of department stores, shopping halls and free-standing large-format shops. In 2001 Galeria Lazur and Outlet Graffica (formerly: Galeria Graffica) were opened, followed four years later by Rzeszów Plaza, Bi1 hypermarket (formerly: Real). In 2006, a shopping centre was opened in the village of Krasne near Rzeszów, with an Auchan hypermarket as the main tenant, followed by Galeria Nowy Świat in 2009. The last decade saw the opening of Millenium Hall (2011) and Galeria Rzeszów (2012). With the development of modern retail space, older buildings are losing their originally dominant retail and service function, while selected premises and entire buildings are being converted to other functions (e.g., the shopping centre at Rejtana avenue, now a medical centre).

There are currently nine shopping centres in the Rzeszów market with a total gross leasable area of 228,600 m<sup>2</sup>, of which eight are located within the city's administrative borders and one in Krasne. In terms of total area, it is the most developed market among cities with a population between 100,000 and 200,000, while in terms of market saturation the Rzeszów market (1,152 m<sup>2</sup> GLA per 1,000 inhabitants) is second only to the Opole market.

Apart from modern shopping centres, the Rzeszów market also offers shopping in smaller facilities, premises in shopping streets, markets, DIY stores and supermarkets.

The city centre is one of the main service and retail zones, in particular the area of Piłsudskiego and Rejtana avenues. Retail facilities are primarily located in the vicinity of major traffic routes - the streets: Krakowska, Witosza, Okulickiego, Podkarpacka. Some retail and service outlets are located in industrial zones, in particular furniture and DIY retailers.

No new full-size shopping centre is currently under construction in Rzeszów. New supply of facilities over 5,000 m<sup>2</sup> is also not expected in the short term. It should be noted that a retail pavilion is being built at Błogosławionej Karoliny street, in a rapidly developing residential area. In the coming years, new retail supply will come primarily in the form of retail park developments and freestanding buildings (less than 5,000 m<sup>2</sup>).



## Basic information

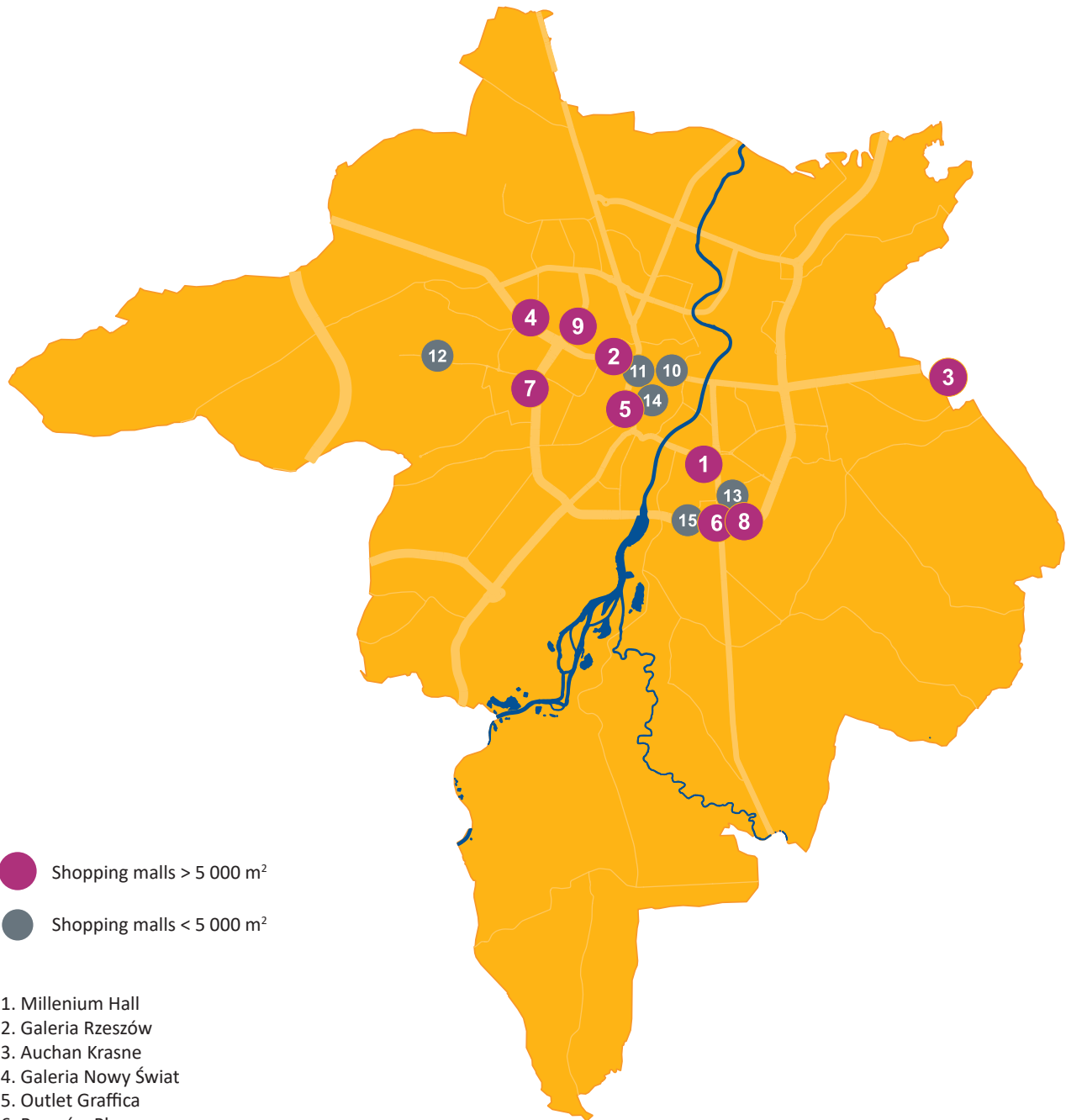


	Rzeszów	Cities 100-199,000 inhabitants (15)	Poland
<b>The resources of a modern area commercial</b>	228,600 m <sup>2</sup>	1,812,300 m <sup>2</sup>	12,423,000 m <sup>2</sup>
<b>Retail space tenacity</b>	1,152 m <sup>2</sup>	851 m <sup>2</sup>	646 m <sup>2</sup>
<b>Number of technical devices</b>	9	76	571
<b>New supply under construction</b>	0 m <sup>2</sup>	16,700 m <sup>2</sup>	191,300 m <sup>2</sup>
<b>Vacancy rate</b>	3%	-	5.3%*
<b>Prime rents **</b>	15-30 EUR/m <sup>2</sup> /msc	-	-





## The largest retail projects in Rzeszów



● Shopping malls > 5 000 m<sup>2</sup>

● Shopping malls < 5 000 m<sup>2</sup>

1. Millenium Hall
2. Galeria Rzeszów
3. Auchan Krasne
4. Galeria Nowy Świat
5. Outlet Graffica
6. Rzeszów Plaza
7. Bi1
8. Galeria Lazur
9. Stara Szwalnia
10. Center Park
11. CH Ameryka
12. Galeria Trend
13. Full Market
14. Pasaz Rzeszów
15. Galeria Nova



## The largest retail projects in Rzeszów

Object name	Address	Gross leasable area (m <sup>2</sup> )	Opening date	Selected main tenants
Millenium Hall	Majora W. Kopisto 1	56,600 m <sup>2</sup>	2011	EUROSPAR, TK MAXX, Multikino, Sports Direct, Toys'R'Us, ZARA, Studio Planowania IKEA
Galeria Rzeszów	J. Piłsudskiego 44	42,000 m <sup>2</sup>	2012	Half Price, Helios, CARRY, C&A, NewYorker, H&M, RTV Euro AGD, Szubryt, eObuwie x modivo
Auchan Krasne	Krasne 20B	38,000 m <sup>2</sup>	2006	Auchan, Leroy Merlin, Carry, CCC, Media Expert, Douglas
Galeria Nowy Świat	Krakowska 20	22,000 m <sup>2</sup>	2009	FRAC, Komfort, Media Expert, PEPCO, Stokrotka, JYSK
Outlet Graffica	plk. L. Lisa-Kuli 19	19,500 m <sup>2</sup>	2001	Empik, Rossmann, H&M
Rzeszów Plaza	T. Rejtana 65	16,500 m <sup>2</sup>	2005	Decathlon, Sinsay, CCC
Galeria Lazur	T. Rejtana 69	13,500 m <sup>2</sup>	2001	E.Leclerc

source: Colliers, March 2022

The structure of demand in the Rzeszów market and the changes in the market in recent months are similar to processes occurring in other cities in Poland. In 2019, the Tesco hypermarket at the junction of Powstańców Warszawy and Rejtana avenues was closed, and a Castorama store opened in its place in 2021. This is further DIY store opening following the launch of a Leroy Merlin store in H2 2019.

An Empik store opened in the Rzeszów Plaza shopping centre in autumn 2021 on an area of approximately 250 m<sup>2</sup>, and a 5.10.15 store opened in March 2022. The refurbished eObuwie x modivo store opened in Galeria Rzeszów. It is worth noting that food operators originating from the Podkarpackie region are present in modern retail facilities. In 2021, the Eurospar store in Galeria Rzeszów was replaced by Delikatesy Szubryt, while Galeria Nowy Świat has a FRAC supermarket.

Residents' Service Points, where local people can receive services from public authorities, are available in shopping centres in Rzeszów, including Nowy Świat, Millenium Hall, Plaza Rzeszów and Galeria Rzeszów.



# 1,152

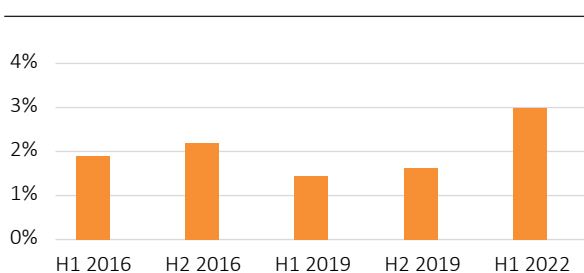
Retail space density (m<sup>2</sup>)

Shopping centre owners also attract customers with periodic themed events, such as flower fairs, fashion shows and markets, such as a vinyl and CD exchange. There is an ice rink at Millennium Hall during the winter season, which hosted the PGE Narodowy touring winter sports fair in February 2022.

Change lies ahead for Rzeszów's retail market. The modernisation of existing shopping centres will affect the further market development and the decisions of tenants. Recent years have seen additions to existing premises and relocations within established retail schemes, These can be significant drivers for change, particularly in older schemes. However, the predominant role will be played by the newest and largest facilities operating in the market, while re-commercialisations of other facilities may complement the main offer.



## Vacancy rate in Rzeszów shopping centers



source: Colliers, March 2022



# Office market



# 113,000

Modern office stock in Rzeszów (m<sup>2</sup>)

Rzeszów is an important office hub in south-eastern Poland. The total supply of modern office space in the city at the end of 2021 was over 113,000 m<sup>2</sup>. A large part of it, approximately 30%, is concentrated in two buildings offering over 10,000 m<sup>2</sup> of office space – SkyRes Warszawska (19,400 m<sup>2</sup>) and Conres (12,500 m<sup>2</sup>). Since the beginning of 2020, approximately 24,500 m<sup>2</sup> of modern space has been delivered to the market within six office projects. In 2020, two prominent modern projects were completed – Resovia Office (8,500 m<sup>2</sup>) and Asseco Innovation Hub (6,300 m<sup>2</sup>). The supply of modern office space was boosted by small office buildings built in recent quarters at Litewska 4c and 39 streets, as well as at Jana Niemierskiego 9 and Podkarpacka 6a streets.

Rzeszów is a relatively young office market, which means the arrival of new supply is irregular. The market started to develop after 2006 and around 55% of the existing space is younger than 10 years. Rzeszów offers new office investments as well as modernised tenements and redeveloped older office buildings. On the edge of the city in Jasionka is the Podkarpackie Science and Technology Park, which offers tenants complete business infrastructure.

Currently, there are three office schemes under construction in Rzeszów, with leasable space of appr. 8,600 m<sup>2</sup>. They include a building in the vicinity of the project at Litewska 4 street, Stara Szwalnia Office and the FIN II Office building. Office space will also be offered within the Olszynki Park mixed-use project. These projects will be delivered over the coming 24 months.

Most of the existing office properties are concentrated in the central part of the city along the main traffic routes (Gen. Sikorskiego and Majora Kopisto avenues). This guarantees convenient access and proximity to major public facilities, financial institutions and retail and service outlets.

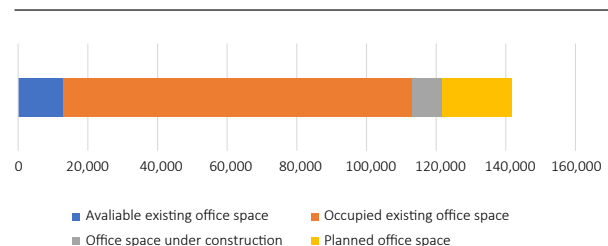
In recent years, companies in the modern business services sector have been increasingly active, expanding and hiring new employees, which translates into demand for office space. Typical tenant requirements depend on their business profile and the size of the office they are leasing. Companies providing a wide range of business services, such as law firms, consultancies and financial institutions, prefer office buildings located in the city centre. An important factor in choosing a location for these tenants is good transport links – access by car, the number of parking spaces, public transport stops

and the visibility of the office building, which supports the company's image and increases its prestige. Office projects outside the city centre mainly attract tenants from the industrial, pharmaceutical and technology sectors, as well as back office services in BPO/SSC. Tenants leasing space outside the centre are usually less demanding and accept a lower standard of office space (B class). In return, however, they want more parking spaces and good accessibility to public transport. International tenants present in the Rzeszów market include Asseco, Deloitte, Carlson Wagonlit Travel. There are at least 50 modern business services companies from the BPO, ITO and R&D sectors.

Rzeszów is considered to have the most business service centres among medium-sized cities in Poland. In 2020, interesting changes took place in terms of employment in the modern business services sector. Rzeszów was among the cities with above-average employment growth of 7.3%, which translates into almost 400 new employees.



## Modern office stock in Rzeszów



source: Colliers, March 2022



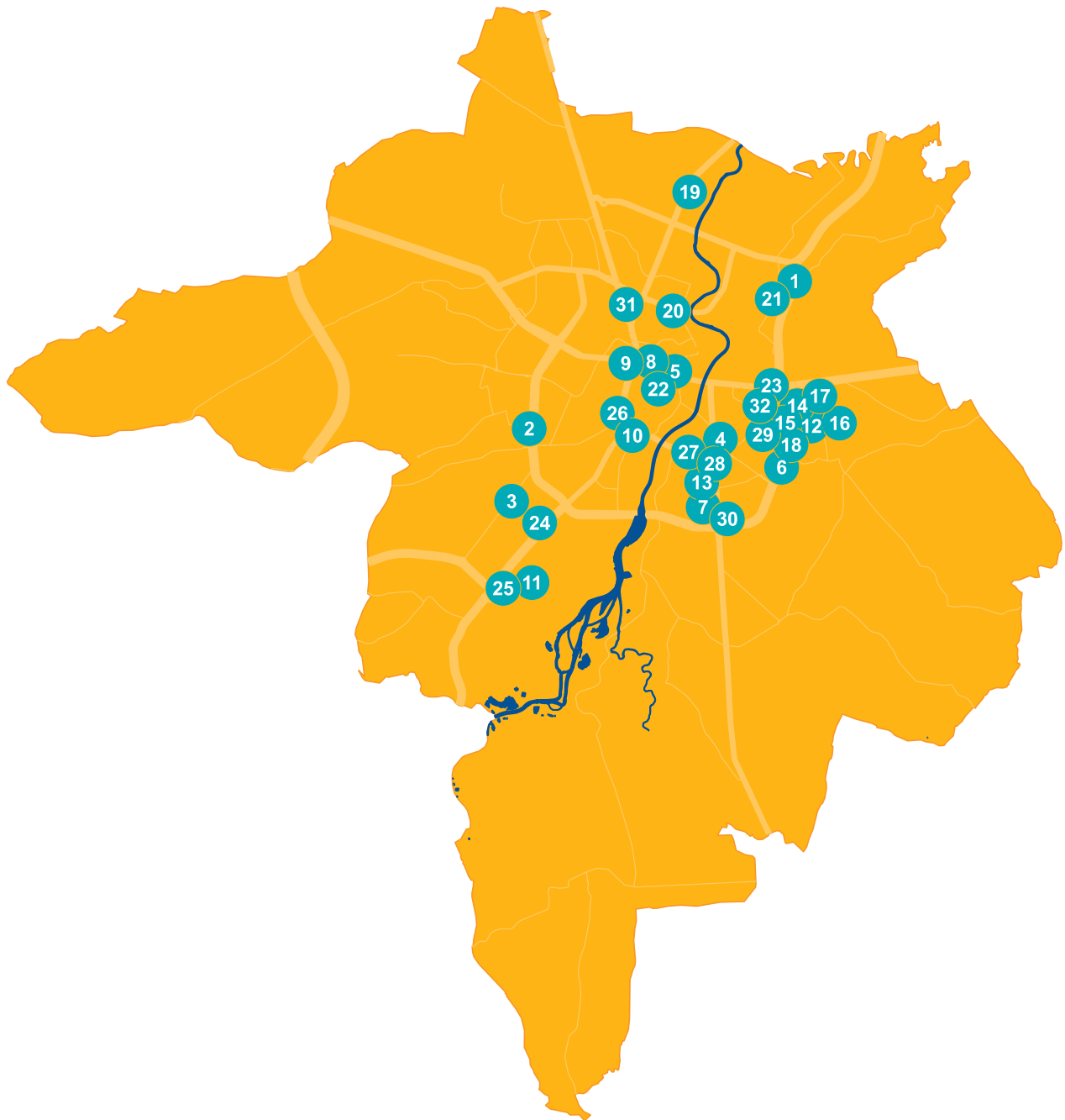
### Basic information

Existing supply	113,500 m <sup>2</sup>
Number of modern office projects	32
Space under construction	8,600 m <sup>2</sup>
Number of office projects under construction	4
Vacancy rate	12%

source: Colliers, March 2022



## Map of existing office buildings in Rzeszów



- |                         |                         |                                |                          |
|-------------------------|-------------------------|--------------------------------|--------------------------|
| 1 Asseco Innovation Hub | 10 Hetmańska 4          | 19 Lubelska 50 D               | 27 Rejtana 20a           |
| 2 Biurowiec FIN         | 11 Inżynieria           | 20 Modo Office                 | 28 Resovia Office        |
| 3 Biznes Park           | 12 Jana Niemierskiego 9 | 21 Nowa Siedziba Asseco Poland | 29 Rzeszów Business Park |
| 4 Capital Park          | 13 Karowa Office        | 22 Panorama Rzeszów            | 30 Rzeszów Plaza         |
| 5 Center Park           | 14 Litewska 10          | 23 Pobitno Office              | 31 SkyRes Warszawska     |
| 6 Centrum 2000          | 15 Litewska 12          | 24 Podkarpacka 6A              | 32 Twardowskiego 9       |
| 7 Conres                | 16 Litewska 29          | 25 Połonińska 7                |                          |
| 8 Europa II             | 17 Litewska 4C          | 26 Poniatowskiego 8            |                          |
| 9 Galeria Rzeszów       | 18 Litewska 8           |                                |                          |

source: Colliers, March 2022



According to ABSL data, in 2021 the city's modern business services sector employed around 5,900 people. Around half of them (2,700) work in centres providing IT services; 1,400 in R&D centres, while the rest are employed in BPO and SSC centres. Rzeszów is an important IT centre in Poland. It is in Rzeszów that Asseco, one of the largest IT companies in Europe, has its headquarters, as well as other companies in the sector, such as SoftSystem, OPTeam, Ideo, Mobic Ltd., Sii Polska, ATOS Polska and PGS Software S.A.

At the end of the first quarter 2022, the vacancy rate in office buildings stood at 12%, which translated into 13,800 m<sup>2</sup> of vacant space. Most of the vacant modules are concentrated in buildings delivered to the market before 2015, while approximately 30% of vacancies are in schemes completed after 2020.

Headline rates for office space in Rzeszów remain stable. In the first half of 2022, rents for B/B+ class space were between PLN 30 and PLN 40 per m<sup>2</sup>/month. Higher headline rents can be observed in A-class investments (existing and under construction), where office space is offered for between PLN 45 and 60 per m<sup>2</sup>/month. In response to the needs of local customers, developers, in addition to leasing, also sell individual office modules.

The city's favourable location, the dynamic development of the modern business services sector and a pool of qualified staff coming from the students and graduates of Rzeszów's universities all have a positive impact on the further development of the office market and the growing interest in Rzeszów among Polish and foreign companies.



Asseco Poland Headquarters, source: City Office of Rzeszów



# Warehouse market

Rzeszów, which is part of the eastern logistics region, is one of the smallest major warehouse markets in Poland. In Q4 2021, the supply of modern warehouse space in this region amounted to just under 182,000 m<sup>2</sup>, while 94,000 m<sup>2</sup> were under construction. The average vacancy rate at the end of the year was 2.8%, which translated into around 5,000 m<sup>2</sup> of free storage space. Supply in the Rzeszów market is concentrated mainly within several logistics parks. The largest existing industrial and logistics complex was 7R Park Rzeszów located at Ludwika Chmury street (49,000 m<sup>2</sup>).

In the Rzeszów region, less than 138,000 m<sup>2</sup> were leased throughout 2021. m<sup>2</sup> of space, including approx. 75,000 sq m in Q4 alone. m<sup>2</sup>. The biggest deals in 2021 in this market included Panattoni Park Rzeszów North (69,000 m<sup>2</sup>), Panattoni BTS Rzeszów (28,000 m<sup>2</sup>) and Panattoni Park Rzeszów Airport III (12,000 m<sup>2</sup>). The structure of leases was dominated by BTS agreements, which accounted for over 79% of gross demand. The most active group of tenants in the Rzeszów warehouse market (by total leased space) were companies from the retail sector, which accounted for more than half of the gross demand last year.

In and around Rzeszów at the end of 2021, four investments were in the construction phase. The largest of these is Panattoni Park Rzeszów Airport III (33,000 m<sup>2</sup>), which is scheduled for completion in the first half of 2022.

Other facilities under construction include Panattoni Park Rzeszów Airport II (approx. 20,000 m<sup>2</sup>), Panattoni BTS Rzeszów (approx. 24,000 m<sup>2</sup>) and LCube Logistic Park Rzeszów II (approx. 18,000 m<sup>2</sup>).

Headline rental rates in the region at the end of 2021 reached EUR 3.2–3.7/m<sup>2</sup>/month. Due to the current economic situation in Poland (increases in prices of building materials, salaries), as well as the situation in Ukraine (relocation of companies, production plants from the East, which leads to increased demand), it is expected that rental rates may increase.



## Basic information

	Q4 2021
<b>Supply</b>	181,500 m <sup>2</sup>
<b>New supply</b>	0 m <sup>2</sup>
<b>Area under construction</b>	93,800 m <sup>2</sup>
<b>Demand</b>	75,000 m <sup>2</sup>
<b>Vacancy rate</b>	2.8%
<b>Headline rent (EUR / m<sup>2</sup> / month)</b>	3.2 - 3.7

source: Colliers, March 2022



7R Cityflex Rzeszów, source: 7R

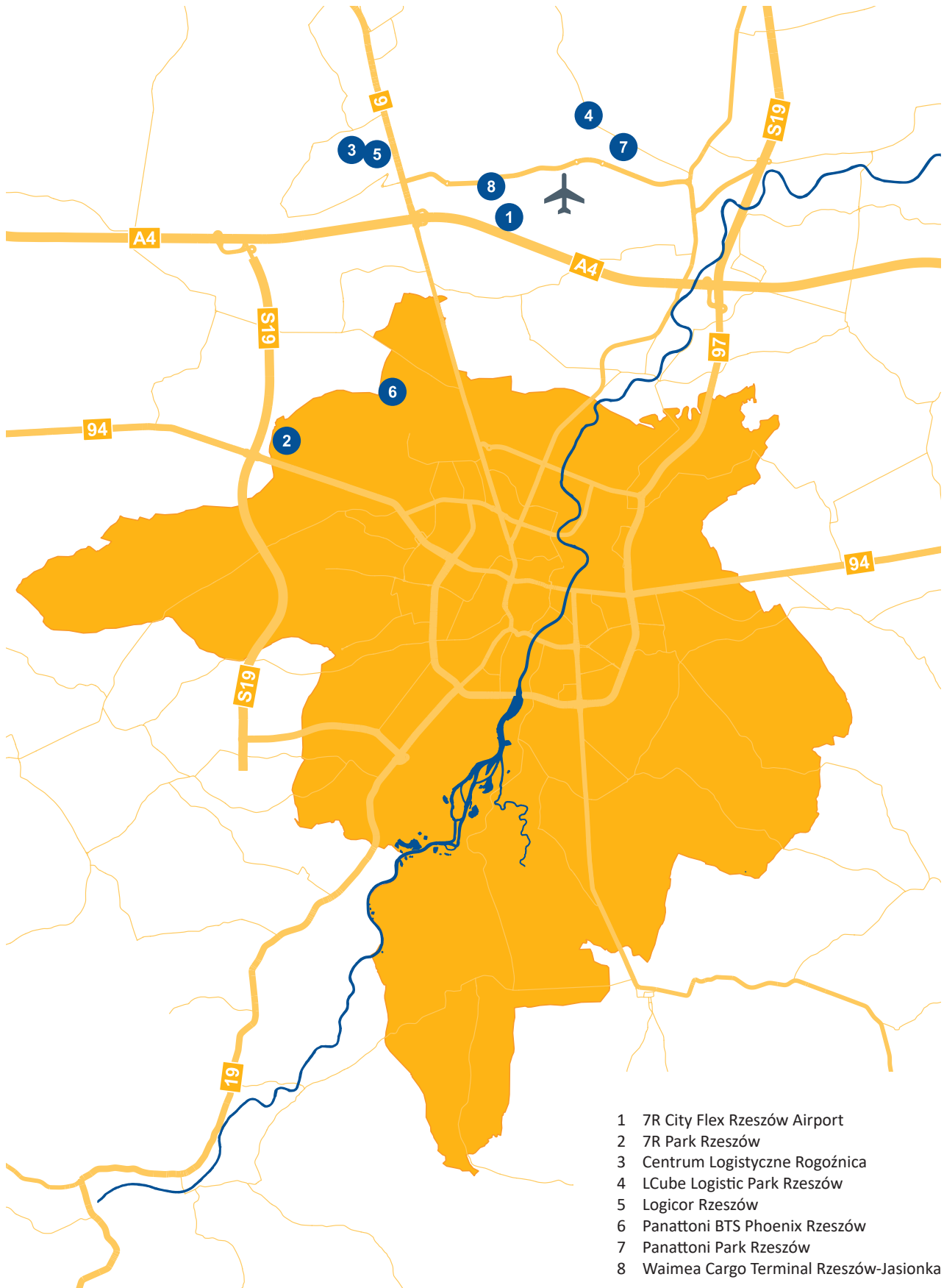
## Selected largest lease transactions in 2021

Tenant	Area (m <sup>2</sup> )	Park	Agreement type
LPP	69,000	Panattoni Park Rzeszów North	BTS
Automotive industry clients	27,930	Panattoni BTS Rzeszów	BTS
Courier services clients	12,000	Panattoni Park Rzeszów Airport III	BTS
Manufacturing industries clients	11,500	Panattoni Park Rzeszów Airport	New agreement
3PL industry clients	5,500	Panattoni Park Rzeszów Airport III	New agreement

source: Colliers, March 2022



## Map of existing warehouse projects in Rzeszów



source: Colliers, March 2022

# Residential market

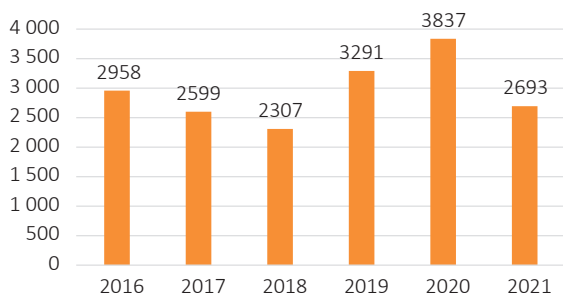
Rzeszów is one of the most rapidly developing urban agglomerations in Poland. It has been systematically expanding its boundaries for several years, most recently by over 160 hectares on the eastern side to the settlements of Staroniwa and Zwiężyca. According to Statistics Poland, in 2020 the housing stock in Rzeszów amounted to almost 90,000 dwellings. Last year, 941 residential buildings were put into use, of which more than 50% were for sale or rent. In total, almost 2,700 dwellings were constructed in these dwellings.



# 2,693

apartments put into use in 2021

## Flats put into use in 2016-2021



source: Colliers based on GUS, March 2022

There are 25 investments currently under construction with a planned completion date of the end of 2024 which will provide the market with over 3,300 dwellings. Almost 80% of this supply will be delivered in 2022.

The Rzeszów residential market is dominated by local developers with the largest number of projects being built by N.G. Development. Companies like Spółdzielnia Mieszkaniowa Projektant and Apklan Deweloper also have more than one project under construction. New projects are being built primarily in the Drabinianka district. - Panorama Kwiatkowskiego, Grabskiego 7, Urocza 10 and Miła Park. New investments are also being built in Przybyszówka (Osiedle Słoneczny Stok, Żmigrodzka Słoneczny Stok), Słocina and Zalesie.

The prices of apartments in the Rzeszów market are very diverse. In case of studios, prices start from PLN 9,400/m<sup>2</sup> and prices for two-room apartments are in the range PLN 6,800-12,900/m<sup>2</sup>. The highest prices are for two and three-room flats, which cost from PLN 5,500 to even PLN 16,700/m<sup>2</sup>. This is due, among other things, to the great diversity in terms of standard. In investments with higher standards, such as Olszynki Park, Apartamenty Zamkowe II, Dominikańska Park, Grabskiego 7 and Panorama Kwiatkowskiego, prices reach as much as PLN 16,700/m<sup>2</sup>.

In the entire available offer of projects under construction, almost half of the apartments are in the 30-50 m<sup>2</sup> range. Approximately 36% have an areas between 50-70 m<sup>2</sup> and 11% between 70-100 m<sup>2</sup>. Units up to 30 m<sup>2</sup> and those over 100 m<sup>2</sup> account for only 5% of the total offer.

Out of the current supply of apartments under construction, almost 75% are already sold or reserved.

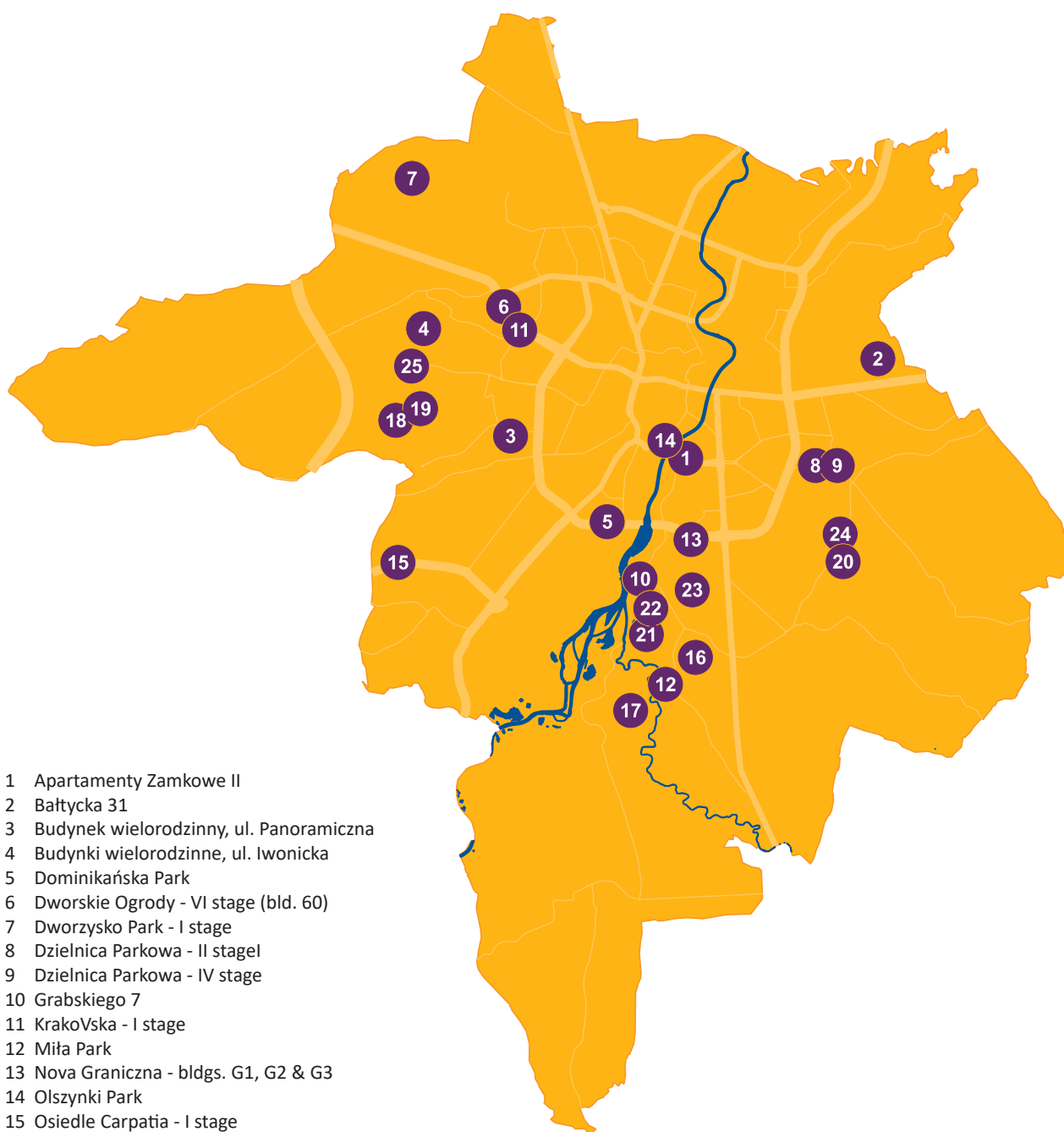
Two and three-room apartments dominate in new developments, accounting for 39% and 43% of the total offer respectively. Studio apartments account for only 5% of the available offer, and four-room flats 12%. Only 1% of available apartments have more than five rooms.



Dzielnica Parkowa housing estate, source: City Office of Rzeszów



## Residential investments under construction



- 1 Apartamenty Zamkowe II
- 2 Bałtycka 31
- 3 Budynek wielorodzinny, ul. Panoramiczna
- 4 Budynki wielorodzinne, ul. Iwonica
- 5 Dominikańska Park
- 6 Dworskie Ogrody - VI stage (bld. 60)
- 7 Dworzysko Park - I stage
- 8 Dzielnica Parkowa - II stage
- 9 Dzielnica Parkowa - IV stage
- 10 Grabskiego 7
- 11 Krakowska - I stage
- 12 Miła Park
- 13 Nova Graniczna - bldgs. G1, G2 & G3
- 14 Olszynki Park
- 15 Osiedle Carpatia - I stage
- 16 Osiedle Miła - II stage
- 17 Osiedle przy Makuszyńskiego - II stage
- 18 Osiedle Słoneczny Stok - I - II stage
- 19 Osiedle Słoneczny Stok - J
- 20 Osiedle Wieniawskiego - III stage
- 21 Panorama Kwiatkowskiego - bldgs. A,D & E
- 22 Panorama Kwiatkowskiego - bldgs. C & B
- 23 Urocza - III stage
- 24 Wieniawskiego 59 - II stage
- 25 Żmigrodzka Słoneczny Stok - V stage

Source: Colliers, March 2022



## The largest residential investments under construction

Name	Investor	Address	Planned completion year	Number of offered apartments
<b>Apartamenty Zamkowe II</b>	HARTBEX Przedsiębiorstwo Budowlane	Podwisłocze	2022	337
<b>Bałtycka 31</b>	DROM s.c. J. Drózdź W. Buczek	Bałtycka	2022	112
<b>Dominikańska Park</b>	Boomerang 1	Dominikańska	2023	11
<b>Dworskie Ogrody - VI stage (bld. 60)</b>	BS Deweloper	Krakowska	2022	64
<b>Dworzysko Park - I stage</b>	Besta Przedsiębiorstwo Budowlane	Technologiczna	2022	100
<b>Dzielnica Parkowa - III stage</b>	N.G. Development	Paderewskiego	2022	153
<b>Dzielnica Parkowa - IV stage</b>	N.G. Development	Paderewskiego	2022	138
<b>Grabskiego 7</b>	N.G. Development	Grabskiego 7	2022	61
<b>KrakoVska - I stage</b>	Bryksy	Krakowska	2022	159
<b>Miła Park</b>	AKRO-DOM	Karola Wojtyły, Miła	2024	76
<b>Nova Graniczna - bldgs. G1, G2 &amp; G3</b>	Developres	Graniczna	2022	372
<b>Olszynki Park</b>	Apklan Deweloper	Fryderyka Szopena	2022	292
<b>Osiedle Miła - II stage</b>	BOZ Development	Miła	2022	136
<b>Osiedle Carpatia - I stage</b>	Inżynieria Rzeszów S.A.	9 Dywizji Piechoty	2022	160
<b>Osiedle Wieniawskiego - III stage</b>	Apklan Deweloper	Wieniawskiego	2022	152
<b>Panorama Kwiatkowskiego - bldgs. A, D &amp; E</b>	N.G. Development	Kwiatkowskiego	2024	-
<b>Panorama Kwiatkowskiego - bldgs. C &amp; B</b>	N.G. Development	Kwiatkowskiego	2023	192
<b>Uroczą 10 - III stage</b>	N.G. Development	Uroczą 8a	2023	35
<b>Wieniawskiego 59 - II stage</b>	Domex sp. z o.o.	Wieniawskiego	2023	55
<b>Żmigrodzka Słoneczny Stok - V stage</b>	Adma Development	Żmigrodzka	2022	122

Source: Colliers, March 2022



# Hotel market

Based on data compiled by the Marshal's Office of the Podkarpackie region, as of December 13, 2021 in Rzeszów there were operating 31 categorized hotels in the city and in the immediate vicinity of the city's border. The abovementioned facilities offer potential guests 2,312 beds available in 1,408 rooms.

The structure of hotels in Rzeszów is predominated by hotels owned by local entrepreneurs. Among schemes belonging to international hotel chains, there are B&B Hotel Rzeszów, Hilton Garden Inn or Holiday Inn Express.

Among the hotels offering their guests SPA & WELLNES you can list such facilities as: Hotel Rzeszów, Grand Hotel Boutique Rzeszów, Blue Diamond Hotel, Park Hotel, Hotel Ambassadorski, Hotel Prezydencki and also Hotel Nowy Dwór.

In the capital of Podkarpacie, 3-star facilities predominate - there are 14 of them in total. Approximately 7 hotels are classified as 4-star projects. In turn, the Bristol Tradition & Luxury hotel offers rooms both in a 5-star standard (86 beds in 43 rooms), and 4-star (54 beds in 27 rooms).



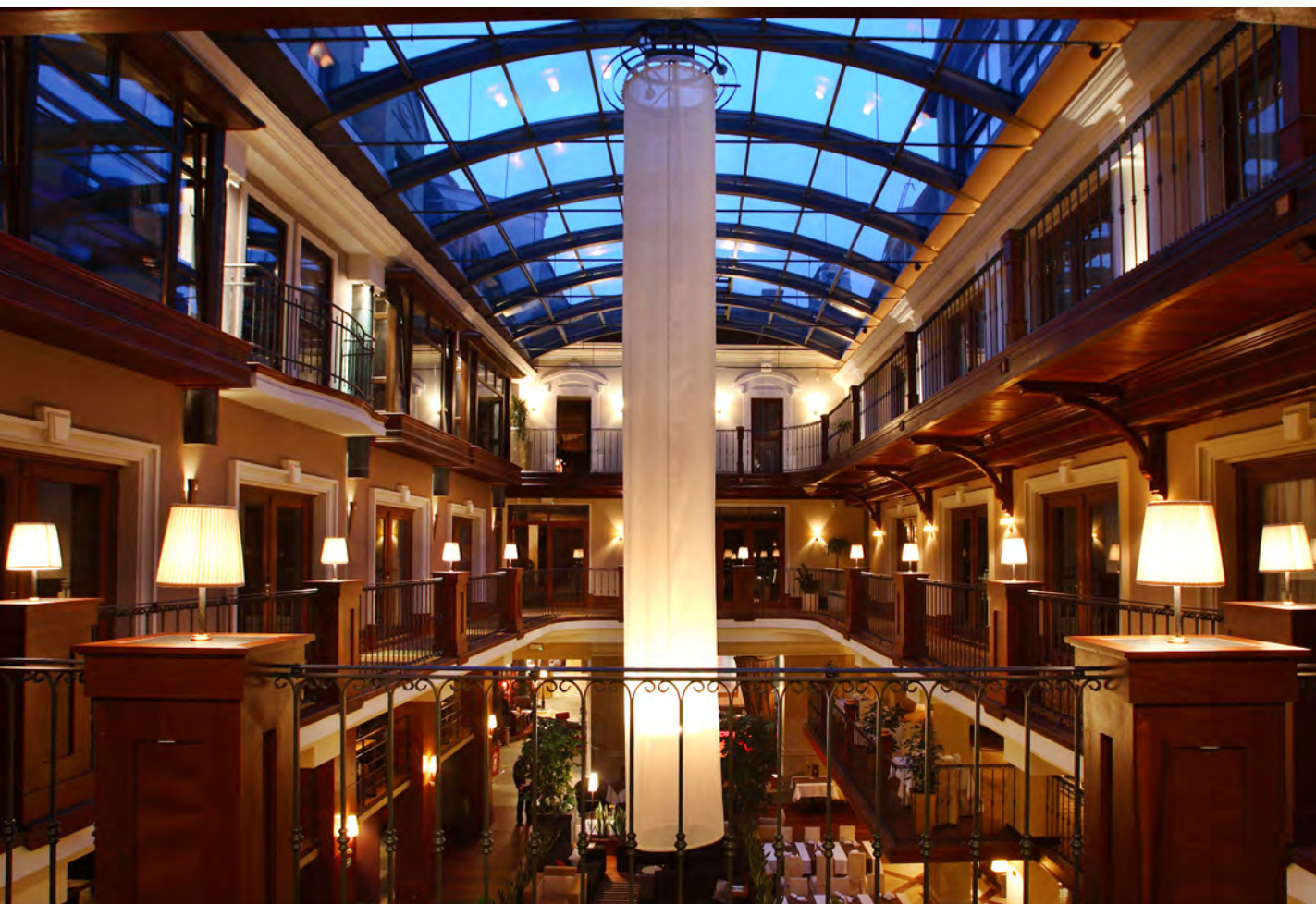
# 31

categorized hotels serving Rzeszów



# 2,312

offered accommodation places



Grand Hotel Boutique Rzeszów, source: City Office of Rzeszów



## Hotel estates

Name of the hotel	Cat.	Address	Rooms	Accommodation	Conference rooms	Capacity of conference rooms
<b>Bristol Tradition &amp; Luxury</b>	*****	Rynek 20-23, 35-064 Rzeszów	43	27	8	492 m <sup>2</sup>
<b>Metropolitan</b>	****	Słowackiego 14, 35-060 Rzeszów	75	136	2	200 m <sup>2</sup>
<b>Hotel Ambadorski</b>	****	Rynek 13-14, 35-064 Rzeszów	56	90	4	205 m <sup>2</sup>
<b>Hotel Rzeszów</b>	****	Piłsudskiego 44, 35-001 Rzeszów	147	206	4	2 500 m <sup>2</sup>
<b>B &amp; B Hotel Rzeszów Centrum</b>	****	Grottgera 28, 35-005 Rzeszów	60	101	4	150 m <sup>2</sup>
<b>Grand Hotel Boutique Rzeszów</b>	****	Kościuszki 9, 35-030 Rzeszów	80	152	6	410 m <sup>2</sup>
<b>Hilton Garden In Rzeszów</b>	****	Kopisto 1, 35-315 Rzeszów	101	131	11	608 m <sup>2</sup>
<b>Hotel Prezydencki</b>	**** ***	Podwisłocze 48, 35-309 Rzeszów	38, 60	76, 105	10	1 075 m <sup>2</sup>
<b>Blue Diamond Hotel *</b>	*****	Nowa Wieś 414, 36-001	51	99	3	520 m <sup>2</sup>
<b>Hotel Forum</b>	***	Lisa Kuli 19, 35-001 Rzeszów	35	55	1	60 m <sup>2</sup>
<b>Apart Hotel 12</b>	***	Podpromie 12, 35-051 Rzeszów	16	26	2	86 m <sup>2</sup>
<b>Hubertus Rzeszów</b>	***	Mickiewicza 5, 35-064 Rzeszów	13	23	4	145 m <sup>2</sup>
<b>Horyzont</b>	***	Podkarpacka 54, 35-083 Rzeszów	11	21	3	200 m <sup>2</sup>
<b>Hetman</b>	***	Langiewicza 29 B, 35-085 Rzeszów	58	69	8	420 m <sup>2</sup>
<b>Falcon</b>	***	Jastrzębia 29, 35-207 Rzeszów	21	42	4	310 m <sup>2</sup>
<b>Villa Riviera</b>	***	Sikorskiego 118, 35-304 Rzeszów	25	44	4	470 m <sup>2</sup>

\* Facilities located in the immediate vicinity of the borders of Rzeszów  
source: City Office of Rzeszów on the basis of a list of categorized hotel facilities in the Podkarpackie Voivodeship,  
as of December 2021





## Hotel estates

Name of the hotel	Cat.	Address	Rooms	Accommodation	Conference rooms	Capacity of conference rooms
Zimowit	***	Armii Krajowej 4b, 35-307 Rzeszów	30	60	3	390 m <sup>2</sup>
Grein Hotel	***	Rejtana 1, 35-326 Rzeszów	50	96	8	500 m <sup>2</sup>
Classic	***	Armii Krajowej 32, 35-327 Rzeszów	49	60	5	270 m <sup>2</sup>
Park Hotel	***	Paderewskiego 124, 35-328 Rzeszów	24	47	1	150 m <sup>2</sup>
Korona	***	Litewska 33 B, 35-302 Rzeszów	16	33	-	-
Holiday Inn Express Rzeszów Airport*	***	Jasionka 952, 36-002 Jasionka	120	164	2	72 m <sup>2</sup>
Hotel Wellnes & Spa Nowy Dwór*	***	Świlcza 146 E, 36-072 Świlcza	38	41	7	800 m <sup>2</sup>
Polonia	**	Grotgera 16, 35-005 Rzeszów	36	54	1	20 m <sup>2</sup>
Iskra	**	Dąbrowskiego 75, 35-040 Rzeszów	33	45	3	100 m <sup>2</sup>
Fryderyk	**	Szopena 33, 35-055 Rzeszów	10	16	1	40 m <sup>2</sup>
Twierdza	**	Podkarpacka 10 B, 35-082 Rzeszów	10	25	-	-
Andersen	**	Krakowska 443, 35-213 Rzeszów	21	47	1	160 m <sup>2</sup>
Mieszko	**	Lubelska 24, 35-233 Rzeszów	13	23	1	35 m <sup>2</sup>
U Krocza	*	Krakowska 316, 35-506 Rzeszów	21	41	3	350 m <sup>2</sup>
Eden	*	Krakowska 150, 35-506 Rzeszów	20	44	2	230 m <sup>2</sup>

\* Facilities located in the immediate vicinity of the borders of Rzeszów

source: City Office of Rzeszów on the basis of a list of categorized hotel facilities in the Podkarpackie Voivodeship, as of December 2021



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# Destination Rzeszów

SPRING 2022

