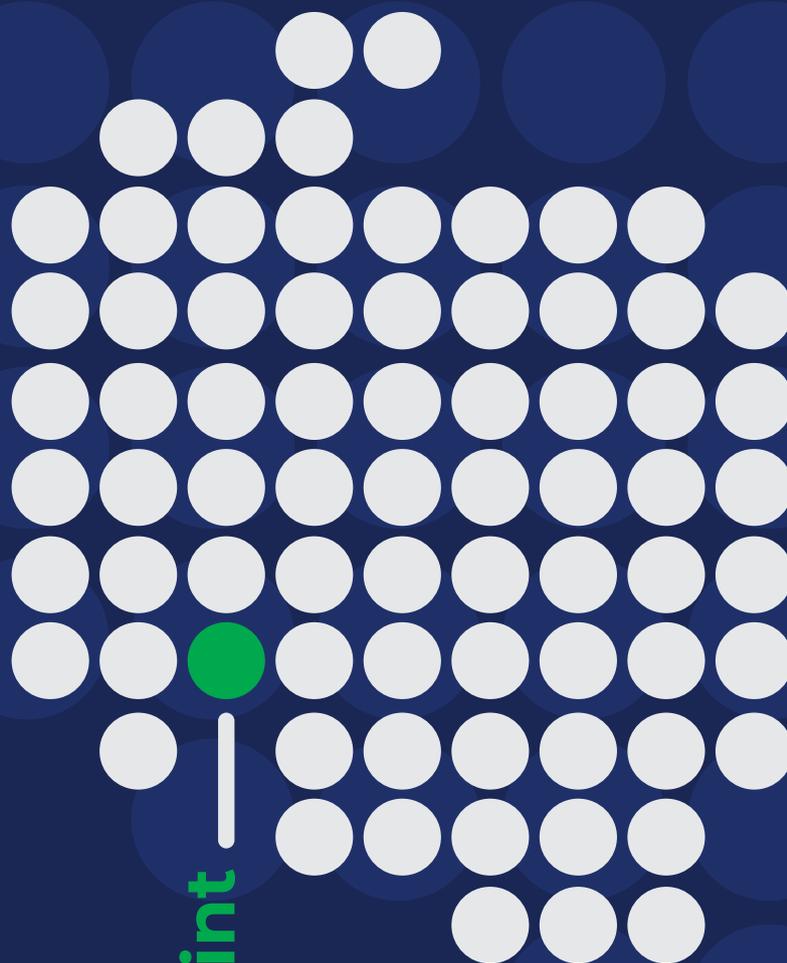


Invest in Poland?



let's get to the **point** —

Wrocław Region.

Soft landing guaranteed!

Publication prepared by ARAW



Wrocław the meeting PLACE

Agencja Rozwoju Aglomeracji Wrocławskiej
Wrocław Agglomeration Development Agency

in cooperation with



Municipality Czernica



Municipality Długoleka



Municipality Katy Wrocławskie



Municipality Kobierzyce



Municipality Miekinia



Municipality Oborniki Śląskie



Municipality Olesnica



Municipality Siechnice



Municipality Wisznia Mała

Wrocław Region.

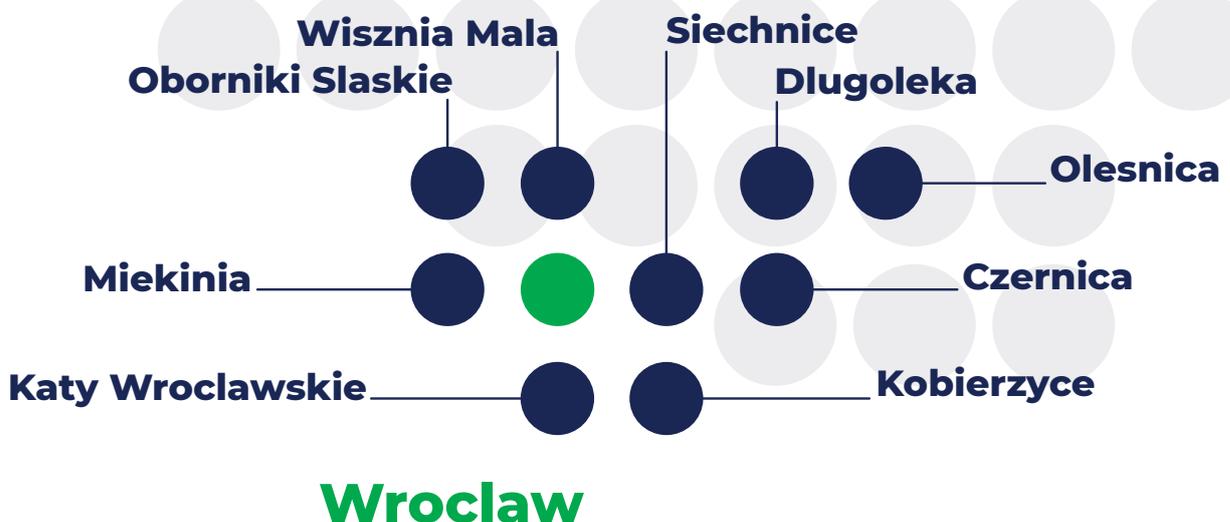
Soft landing guaranteed!

The Wrocław Functional Area (WFA) is one of Poland's most important and economically soundest metropolitan areas, as well as a centre of social and economic development that has been gaining increasing European presence. The systematically growing economic potential of the region is no longer owed only to the city of Wrocław but also to the neighbouring booming municipalities forming part of the functional area.

The following are the three main factors behind the high economic and investment attractiveness of the Wrocław Functional Area:

- social and economic conditions, including demographics (high share of pre-working age and working age population), location next to important transport routes, presence of special economic zones, activity of business environment institutions,
- tourist and recreational values such as high woodiness, protected areas, biological diversity,
- local activity of municipal governments and mayors who have been undertaking a number of infrastructure improvement projects with a view to improving the quality of life of residents.

The following pamphlet is an excellent source of knowledge and statistical data presenting the economic development and potential of Wrocław and the surrounding region (WFA), including the nine municipalities taking part in the project titled „Promotion of selected WFA municipalities in Poland and abroad as attractive areas for business and investment purposes”.



Czernica



The municipality of Czernica is number one in Lower Silesia and number three in Poland in terms of population growth rate (according to GUS, Poland's statistical office). It is most popular among the residents of Wrocław who move to Czernica for its safe and quiet residential areas combined with close proximity to all major attractions of a large city. Czernica offers a well-developed social infrastructure and a wide selection of properties to suit every budget.

The high attractiveness of Czernica's investment land contributed to an increase in the number of residents, many of whom are highly skilled and experienced specialists. Currently, people are one of Czernica's main assets.

The municipality is crossed by roads of national and international importance. The East Wrocław Ring Road (WOW) offers easy access to the A4 motorway (east-west), as well as links to S5 and S8 expressways (north-south). Two railway lines (277 and 292) enable convenient freight and passenger transport. Work is under way conducted in collaboration with the Ministry of Maritime Economy and Inland Navigation to establish a river port (logistics centre) on the E70 international waterway (the Oder Waterway). In Dobrzykowice, nearby the properties offered for sale, there is the Lower Silesia Broadband Network (DSS) for data transmission.

The municipality of Czernica is seeking business partners who wish to take advantage of its convenient geographical location as well as its other assets and potential.

Czernica is a very attractive investment location. The best land can be found in the north-western part of Dobrzykowice, between Dobrzykowice and Kielczówek, approximately 1 km from the planned exit from the East Wrocław Ring Road.

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Długoleka



Długoleka is a municipality near Wrocław offering huge potential. Among Długoleka's main assets is its location that is very convenient for companies operating across Europe. The municipality is crossed by important transport routes such as the expressway to Warsaw or the connector road to the Wrocław Motorway Bypass. In the near future a junction on the Bielany-Lany-Długoleka bypass will be open for motorists. Equally important are the existing railway lines and the proximity of border crossings and of the airport.

The direct vicinity of the Wrocław metropolitan area is another advantage on the long list of the area's assets. The above mentioned factors are appreciated not only by the local residents whose number is nearly 29 000, but also by entrepreneurs. Długoleka is home to major domestic and foreign companies and since the inauguration of the Wrocław Motorway Bypass (AOW) has attracted the interest of transport companies, warehouse space developers, large-format stores and companies from the automotive industry. Recent years witnessed a number of car dealerships setting up shop here along the national road No 8. They include representatives of nearly all global car brands.

The investment attractiveness of the municipality has been growing along with locating economic activity areas next to new transport links (e.g. next to the Lozina junction) and thanks to comprehensive service and assistance provided to investors by the local authorities.

The efforts taken by the municipal authorities aimed at promoting local economic development have on many occasions been recognised by juries of prestigious competitions such as the Lower Silesian Griffin (Economic Development Award), Regional Leader of Innovation and Development, Golden Site, Branded Local Government and Pearls of Local Government.

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Katy Wrocławskie



The municipality of Katy Wrocławskie is modern and dynamic. Its convenient geographical location, proximity to Wrocław and to major transport routes make it an attractive investment location.

The A4/A8 motorway interchange is located in the municipality and the A4 motorway runs across its entire area. Access to air transport is problem-free as the international Wrocław-Strachowice airport and a sports airport in Mirosławice are respectively only 10 and 13 km away. The municipality is crossed by the Wrocław-Jelenia Góra railway line including several transshipment points.

The rational policy pursued by the town and by the municipality has brought lower unemployment and stabilisation of the local labour market. The local development strategy is based on preferences given to investment projects that are friendly for the residents and for the natural environment, as the municipality of Katy Wrocławskie intends to remain a great location for work and business but at the same time for living and recreation.

Special preferences are given to investors creating new jobs. The municipality invests its own funds on infrastructure modernisation (water supply and sewerage systems, lighting and road pavements) as well as on improving the educational and leisure offer for the residents. Modernisation efforts are aimed at providing comfortable living conditions for the local community and at attracting new investors.

The long-term investment plan implemented by the local authorities has been constantly bringing new prospective investors while keeping the existing investors satisfied. The successes of the municipality have been recognised in a number of awards such as the first place in the ranking of local governments compiled in 2008 by the Rzeczpospolita daily, Lower Silesian Griffin in 2010 or Lower Silesian Key to Success in 2011.

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Kobierzyce



The municipality of Kobierzyce is located in the eastern part of the Wrocław Plain. It is one of the 169 municipalities forming part of the Lower Silesia province and one of the nine municipalities constituting the Wrocław county (powiat). There are 33 towns and villages in the municipality whose total area is 16,911 ha.

The past 20 years witnessed a transformation of the municipality of Kobierzyce from typically agricultural to agri-industrial and it became one of the fastest growing municipalities of Lower Silesia. The above was possible owing to excellent location, well-developed local infrastructure, inflow of investments and the policy of local authorities.

The municipality of Kobierzyce boasts an excellent location. The fact that it is crossed by national and international roads (E8/E67 Warszawa-Wrocław-Kudowa Zdrój-Vienna), road No 35/E261 (Poznań-Wrocław-Prague), A4/E40 motorway (Berlin-Wrocław-Cracow) makes it very well connected to Warsaw and to other major cities in Poland and in the rest of Europe. Thanks to the immediate proximity of Wrocław the municipality benefits from synergy. It is crossed by the A4 motorway and the S8 expressway. The airport in Wrocław is 14 km away.

The area is home to the Tarnobrzeg Special Economic Zone - one of Poland's top investment projects and a conglomerate of large production companies. In 2007 a Technology Park was established within its limits. Currently, more than 10 000 people from across Lower Silesia work on the 280 ha of the zone.

Other attractive investment land in the municipality of Kobierzyce can be found in the Regional Business Development Zone: Domasław-Magnice, Bielany Junction and Wierzbice Junction.

The municipality has been recording a constant population growth. The main assets of the municipality of Kobierzyce include employment opportunities, proximity of Wrocław, well-developed transport network and housing infrastructure. Unemployment is very low and per capita income makes Kobierzyce one of the top municipalities in national rankings.

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Miekinia



The municipality of Miekinia is situated within the area of strong impact of Wrocław which is a quickly developing economic and cultural hub. The innovation potential of the area lies in its research and development facilities and in highly educated people.

Miekinia's industrial zone is home to companies from different industry sectors and of various sizes. The municipality intends to continue the development of its industrial zone sticking to the policy of diversification which is expected not only to provide revenues but first of all to create jobs for the residents. Miekinia welcomes large and small investors from various industry sectors.

The following transport routes pass through the municipality and are crucial for its development: Wrocław–Legnica national road No 94, which then runs to Zielona Góra and Szczecin and two trunk railway lines: Wrocław–Legnica–Dresden and Wrocław–Szczecin–Berlin. The distance to the nearest motorway and expressway is 25 and 15 km respectively and the international Wrocław-Strachowice airport is 15 km away. The municipality lies on the river Oder, which is the waterway for inland navigation from Gliwice to Szczecin.

Miekinia offers great recreational potential. It includes the Zabor forest nature reserve extending on 34.72 ha, the Bystrzyca Valley Landscape Park offering protection to extremely valuable riparian and oak-hornbeam forest, to fragments of wet meadows and old river beds, all of which provide excellent conditions for the development of hiking and bicycle tourism.

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Oborniki Śląskie

Oborniki Śląskie



The municipality of Oborniki Śląskie lies at the foot of Trzebnica Hills within a complex of pine forests. Together with their buildings, the forests form a vast park-like area with historical villas and an abundance of flora and fauna. The municipality is referred to as the „green lungs of Wrocław”. The area of Oborniki Śląskie features a specific microclimate characteristic for forested and dry areas and being the warmest region of Lower Silesia it provides excellent conditions for investment projects connected with recreation and tourism.

From the point of view of tourism and recreation, the area's main attractiveness lies in its landscape physiognomy, natural and cultural values and tourist development potential. Forests are the largest and most valuable areas of the municipality for tourist, leisure and recreational purposes.

The municipality is located 20 km from downtown Wrocław and 25 km from the nearest passenger airport. The A8 motorway is 12 km away, and the closest expressway (S5) is only 1.1 km away as the crow flies. The S5 can be reached through the Prusice junction (6.7 km away) or the Trzebnica junction (2.7 km away). The town of Oborniki Śląskie lies on the E59 railway line (international railway freight transport route).

Services are the largest economy sector in the municipality, with construction and retail trade also growing in importance. In 2017, the total number of active companies was 1,752. The biggest group is composed of sole proprietorships in the construction and transport sectors.

The proximity of Wrocław and a well-developed road and railway infrastructure are the factors attracting investors and entrepreneurs.

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Olesnica



The municipality of Olesnica lies in the central part of the Olesnica county, 30 km north-east of Wrocław (the capital of Lower Silesia) and forms part of the Wrocław metropolitan area.

The municipality of Olesnica is a rural municipality including 28 villages surrounding the town of Olesnica (urban municipality). The municipality of Olesnica is the largest one in the Olesnica county. The area of the municipality is approx. 24 285 ha (242.85 km²).

The municipality of Olesnica has more than 13 000 residents who, together with the residents of the town of Olesnica (more than 36 000) make up 50% of the population of the Olesnica county (8 municipalities).

The municipality of Olesnica is well connected to the remaining towns of the region and of Poland. It is crossed by the S8 expressway (three road junctions: Olesnica East, North and West), national road No 25, provincial roads No 340 and No 451. The town of Olesnica has a railway junction where railway lines from Wrocław to Ostrow Wielkopolski, Kluczbork and Kepno converge.

The total area designated for business activity is 5% of the total area of the municipality (approx. 971 ha). The largest site (total area of 358.83 ha) allocated for economic development is the former Olesnica airport owned by the Military Property Agency.

The main economy sectors include construction, services, automotive, industrial, logistics and transport. There are 842 businesses from various industry sectors active in the municipality. There is land available zoned for business or investment purposes. Business opportunities also include cooperation with other companies operating in the municipality.

The municipality of Olesnica is appealing for tourists. It boasts monuments dating back to the 18th century, including mainly churches and palaces. The area is attractive for all those who want to spend their free time in a healthy way, relax and at the same time visit the monuments of Silesian art and architecture. The local forests abundant with wild mushrooms are awaiting nature lovers. The forests and riverside green areas are a habitat of various species of fauna (Natura 2000 area).

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Siechnice



On the north, the municipality of Siechnice borders Wrocław and on the north-east it is skirted by the river Oder. Its convenient location is favourable for the development of business, residential development and tourism.

The municipality is crossed by the national road No 94 (Zgorzelec-Wrocław-Opole-Bytom-Kraków), provincial road No 395 (Paczków-Ziębice-Strzelin-Wrocław), East Wrocław Ring Road (WOW), and three railway lines (the only such municipality in the Wrocław metropolitan area). The A4 motorway runs 5 km from the municipal border and the international airport in Wrocław is less than 20 km away.

In 2000, the Municipal Area of Business Activity (GSAG) was established in Siechnice. The above area was designated in the southern part of the town, in direct vicinity of the national road No 94 (Wrocław-Opole) and is zoned for production and retail/commercial development. Recently, new investment projects have been located mainly near the transport hub created by the national road No 94 and the Eastern Wrocław Ring Road.

The economy of Siechnice is made up not only of large companies. The town is also a friendly business location for SMEs. More than 2 000 businesses are registered in the municipality.

In the past 10 years the population of Siechnice has gone up from 13 000 to more than 20 000. Thus, each year the municipality gains several hundred new residents. The newcomers are mainly young, highly skilled people. Because many people start their families here, the municipality of Siechnice has for years boasted a record high birth rate in comparison with other regions of Poland.

Siechnice has been attracting foreign investment not only by its convenient location and excellent road link to the airport. The municipality has been investing in underground utilities, which significantly improves the attractiveness of the land. The above, combined with professional assistance offered to investors with all the paperwork connected with the investment process, makes a good investment climate.

In summary, excellent geographical location and transport options, as well as human capital and vigorous local government are the municipality's main assets.

For more details about our investment offer visit get-to-the.pl



Wisznia Mala

The municipality of Wisznia Mala lies in the eastern part of Lower Silesia and neighbours Wrocław and the municipalities of Oborniki Śląskie, Długoleka and Trzebnica.

Its total area is 10 333 ha, of which 1 245 ha lie within a military firing range. The municipality has a population of 9 756 people, of whom nearly 200 are temporary residents including migrants from Ukraine.

The municipality of Wisznia Mala is crossed by the national road No 5 from Wrocław to Poznań, connected via the North junction with the East Wrocław Ring Road. In 2017 a new four-lane S5 expressway connecting Wrocław and Poznań was opened. The Kryniczno junction on the S5 expressway offers very convenient road link (north and south) to the A4 motorway.

The municipality is located 7 km from Wrocław and 21 km from the Wrocław airport which can be reached by car in less than 20 minutes. The municipality is also crossed by a fully electrified double-track railway line No 271, being a part of the international transport route from Malmö – Ystad to Vienna, Budapest and Prague. It is the shortest and the most convenient route from Scandinavia to Central and Eastern Europe and to the Balkans.

The main economy sectors in the municipality of Wisznia Mala are food production, construction and IT.

For the past couple of years Wisznia Mala has been extremely popular among Wrocław residents. Many of them have built their homes here and have been living happy lives among forests, at the same time not missing out on access to cultural and social life.

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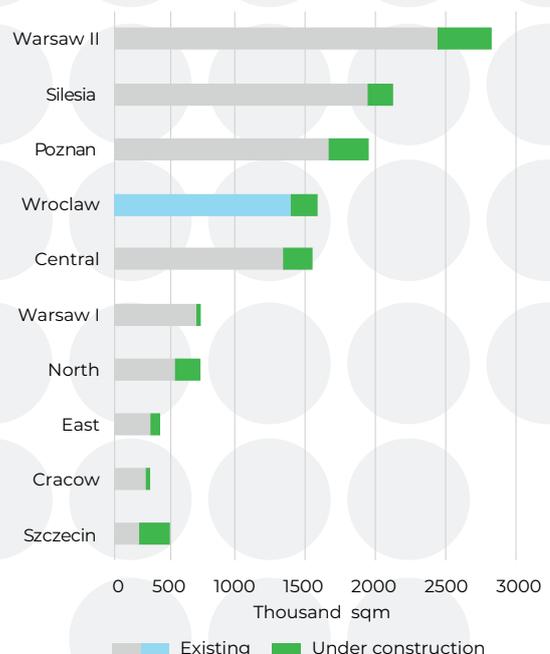
Overview of the region

In terms of the industrial and logistics market, the Wrocław region seems to be one of the most attractive destinations for investment in Central and Eastern Europe. The region benefits from a well-developed road infrastructure including the A4 and A8 motorways and the S8 expressway.

Thanks to Wrocław's location in close proximity to the Czech and German borders, the region is often chosen by logistics operators and retail companies distributing products to Western Europe, including e-tailers.

Additionally, strong activity within the Special Economic Zones and the favourable investment climate of Wrocław City are both important drivers for manufacturing companies and influence the large share of foreign direct investment in the region. In terms of the FDI volume, Wrocław is a leader at the country level.

Industrial and logistics supply by region



1 440 000 sqm

Total logistics and industrial stock



2.7 - 3.9 €

Headline rents per square meter



100 000 sqm

Supply under construction



6%

Vacancy rate of total stock

/ Why Wroclaw? Why Poland?

"The exceptional thing about Wroclaw is the fact that the city is very helpful beyond the investment stage. For all of our 20 years in Wroclaw we have always received professional and active support from the municipality and dedicated experts from the Invest in Wroclaw team."

Alain Simonnet, Managing Director of 3M Poland

Wroclaw

1 200 000

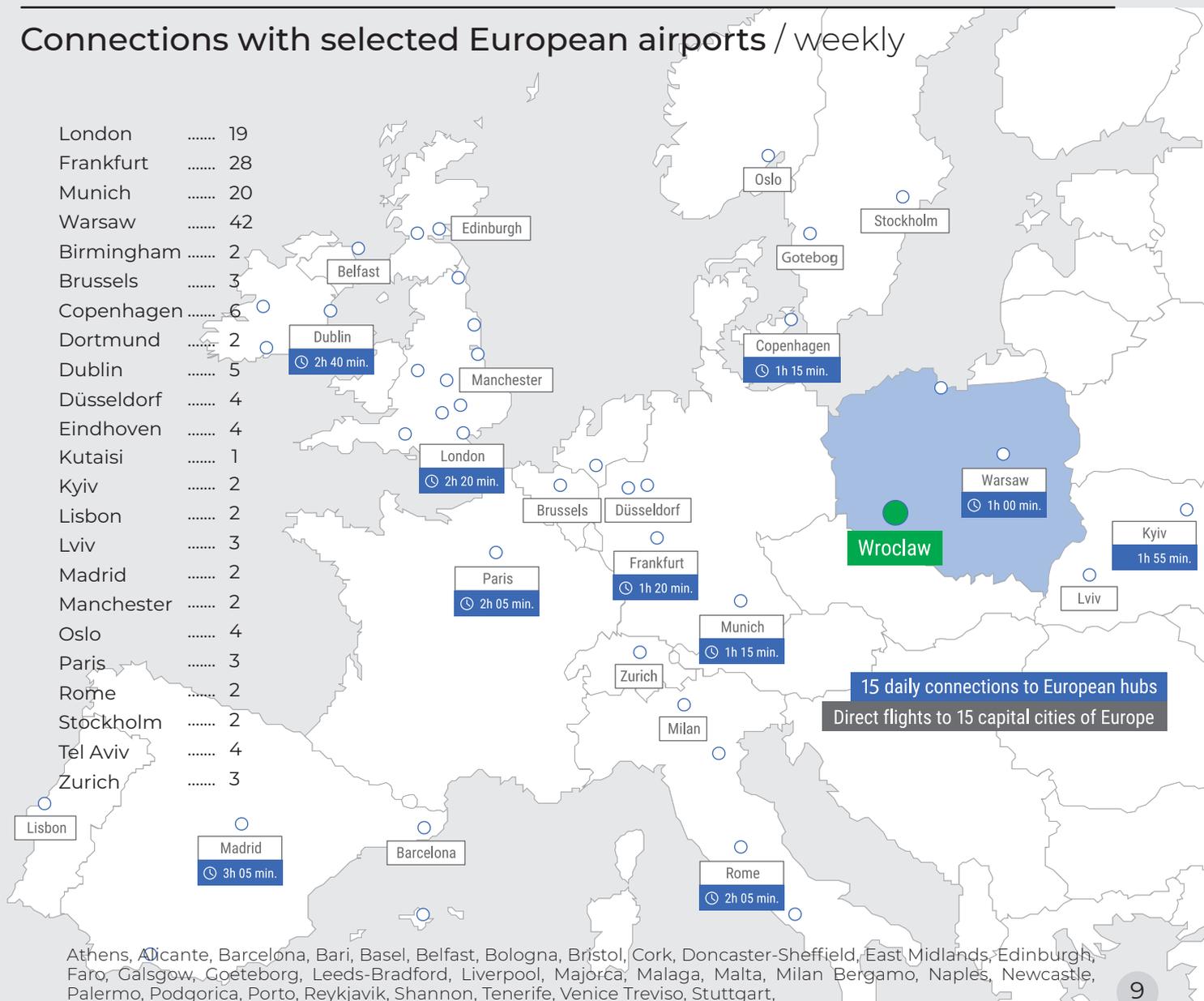
The Wroclaw area population. The city itself boasts 637 000 inhabitants, which makes it the fourth largest city in Poland.

88%

of students would recommend Wroclaw to their friends. *Considering that fact Wroclaw – with 125 000 students – is one of the top academic centers in Poland.

*BEELINE Research & Consulting – 2015

Connections with selected European airports / weekly



/ Public transport system of Wrocław

Wrocław's efficient public transport system consists of bus and tram lines, agglomeration trains, and the City Bike System. An advanced city-wide Intelligent Transport System is prioritizing public transport and increasing its efficiency.



Bikes

220 km of bike lanes
740 bikes and 74 stations in
City Bike System
over 1 million of city bike
rides in 2016



Electric cars

first Polish city to launch
electric car rental in 2018
200 electric cars in the first stage
12 charging stations
in the first stage

/ Shared services, BPO & IT sector

Wrocław is one of the leading destinations for business services, IT sourcing, and software development in Poland and Central Europe. The key factors constituting the attractiveness of the city are the large talent pool of professionals and graduates, the high quality of education, high level of language skills, and quantity of modern office stock. The large number of R&D centers together with strong IT and finance sectors are features that distinguish Wrocław as a high quality location.

40 000*

employees in the modern services
sector in Wrocław

47

destinations from
Wrocław Airport

151*

shared services,
BPO & IT sector

30+*

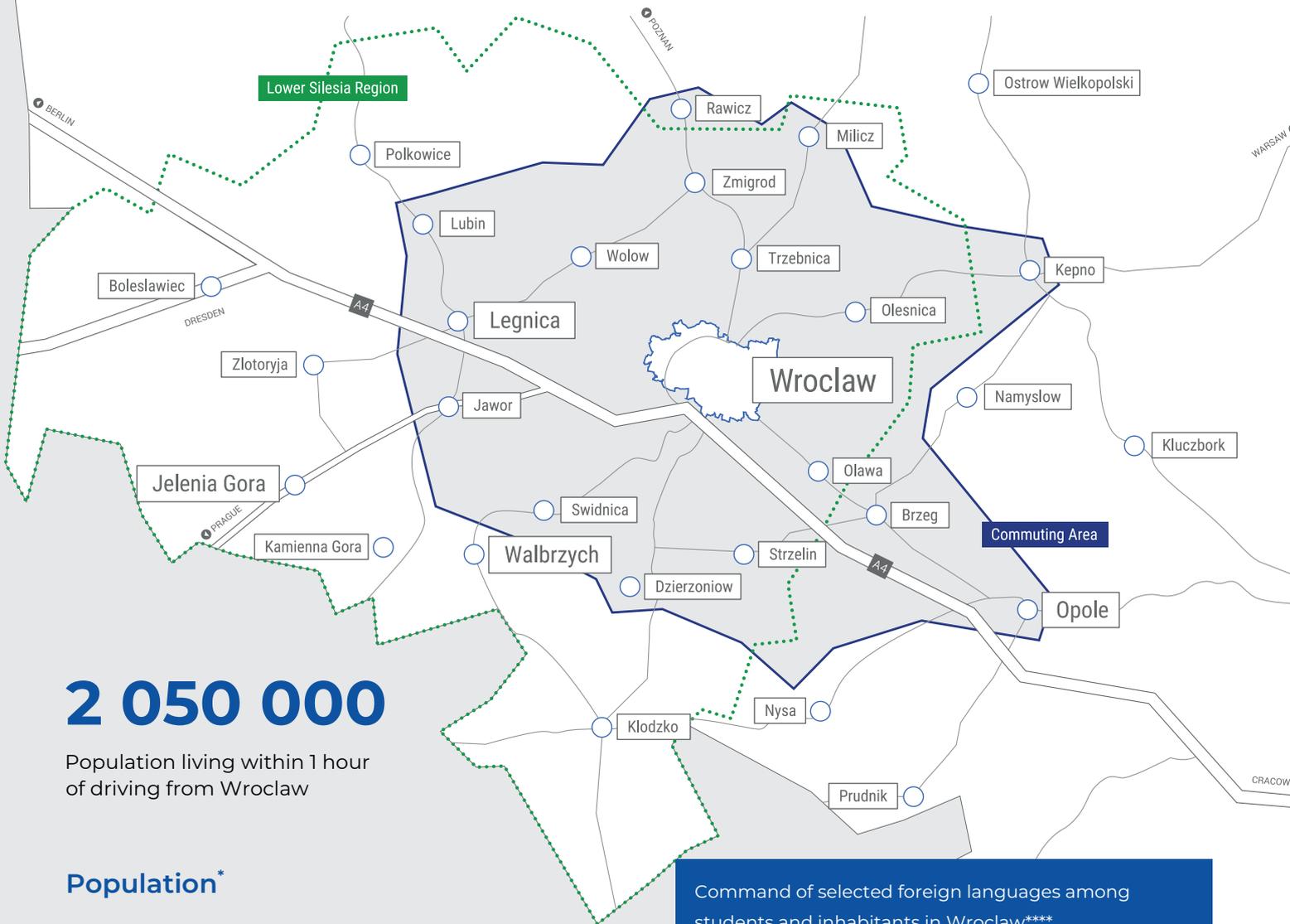
languages spoken
in Wrocław service
centers

904

thousand sq. meters
of modern office stock
(Q4 2017)

*Source: ARAW's own survey.

/ Talent Pool & Commuting Area



2 050 000

Population living within 1 hour of driving from Wrocław

Population*

- 637 000 ● Wrocław population
- 1 200 000 ● Wrocław Area** population
- 2 900 000 ● Lower Silesia Region population

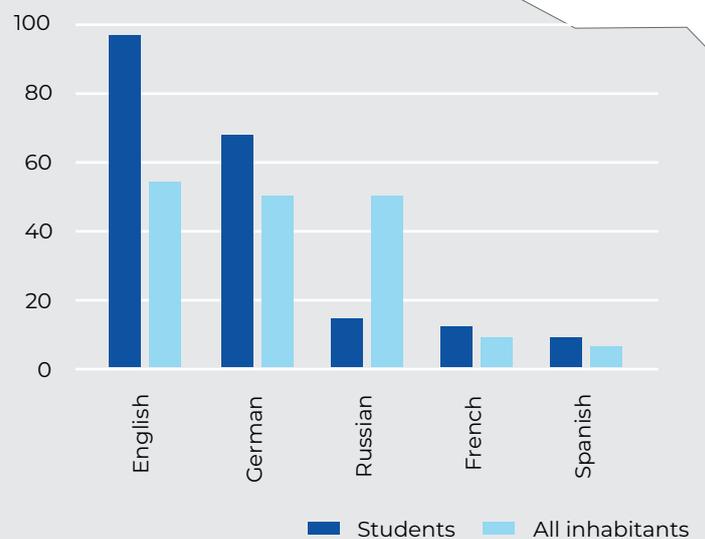
Unemployment Rate*

- 2.2% ● Unemployment in Wrocław
- 6.9% ● Unemployment in Poland
- 6.0% ● Unemployment in Lower Silesia Region

Key facts

- 1st ● Polish City – relocation destination***
- 50 000 ● Wrocław Area population growth (2005-2015)*
- 1 820 000 ● People of productive age in Lower Silesia*

Command of selected foreign languages among students and inhabitants in Wrocław****



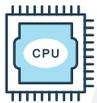
* Central Statistical Office of Poland, as of January 2018 ** Area within 30 minutes of driving to Wrocław

*** Antal Report: "Activity of professionals and managers in the labor market in Poland", January 2017 **** Pentor

/ Innovation Driven City

Wroclaw is the most innovative city in Poland with the largest number of R&D centers, thanks to the cooperation between municipality, business sector and academia, and was awarded by Financial Times with fDi Strategy Award 2016 (for academia business links).

Major areas of innovation



Information Technology



Chemistry & Pharmaceuticals



Engineering



Biotech & Nanotech

125 000 students in Wroclaw

35 000

graduates annually

26

universities
& higher education
institutions

5 817

foreign students
in Wroclaw

96%

students speak
English

Number of students of important majors in Wroclaw

14 440

IT & IT related

34 800

Engineering

26 900

F&A, Management

5 500

Language studies

7 360

Law & Administration

/ Labor Market

Poland's labor market is fairly flexible compared to other EU countries. Employment protection legislation is not overly burdensome with an important role for temporary contracts that are widespread among young and low skilled workers. Fix-term contracts are the market standard for higher roles, in the modern services industry (SSC/BPO) and IT, with civil contracts becoming more popular in the technology sector. Wage bargaining is uncoordinated and decentralized, conducted at firm level what has helped the Polish economy to ensure an alignment of wage and productivity dynamics.

Information Technology - Infrastructure

Role	Salary € / annum
Junior specialist (<3 years exp.)	9 460 - 25 800
Specialist (>3 years exp.)	12 900 - 34 830
Manager (Team Leader, First Line Manager)	18 060 - 58 050
Director (Middle / High Level Manager)	28 380 - 81 700

Information Technology - Business Applications

Role	Salary € / annum
Junior specialist (<3 years exp.)	24 080 - 36 120
Specialist (>3 years exp.)	35 045 - 47 300
Manager (Team Leader, First Line Manager)	51 600 - 68 800
Director (Middle / High Level Manager)	64 500 - 94 600

Production / Warehousing

Role	Salary € / annum
Production Worker	6 400 - 9 500
Production Shift Leader	14 000 - 30 000
Production Engineer	11 000 - 22 000
Production Manager	28 000 - 55 000
Warehouse Worker	6 400 - 8 000
Forklift Operator	8 500 - 11 000
Warehouse Manager	19 000 - 39 000

Information Technology - Software Development

Role	Salary € / annum
Junior specialist (<3 years exp.)	12 900 - 34 000
Specialist (>3 years exp.)	21 500 - 55 900
Manager (Team Leader, First Line Manager)	27 950 - 68 800
Director (Middle / High Level Manager)	30 100 - 129 000

Accounting

Role	Salary € / annum
Junior Accountant (<2 years exp.)	11 000 - 14 000
Accountant (2-3 years exp.)	12 500 - 15 000
Senior Accountant (>3 years exp.)	15 000 - 18 000
Manager	33 500 - 53 000

Other popular roles

Role	Salary € / annum
General Manager (SSC)	52 100 - 92 700
Asistant to CEO	14 000 - 21 600
IT Director (5-7 yrs experience)	41 300 - 65 600
HR Director (5-7 yrs experience)	34 000 - 64 100
HR Manager (5-7 yrs experience)	22 300 - 38 500
HR Specialist (2-4 yrs experience)	11 100 - 14 400
Finance Director (5-7 yrs experience)	39 700 - 64 900

All salaries - gross

/ Quality of Life

Attractive & Multicultural

Wroclaw is the top Polish city for relocation according to managers and specialists.** It was also awarded for being the best Polish city to work and live for expats,** who appreciate city support for newcomers, like the dedicated information office for foreigners – Infolink and expats' associations, like the International Friends of Wroclaw. High quality goes along with attractive cost of living as consumer prices including rent in Wroclaw are lower than in Berlin (40%), Barcelona (37%) or Warsaw (13%).****

Leisure & Culture

Wroclaw is a cultural center that never sleeps. Numerous theatres, cinemas, museums and exhibitions provide a sophisticated cultural life to the inhabitants. The cultural importance of Wroclaw was reflected in being declared the European Capital of Culture of 2016. It resulted in 2 000 cultural events with over 5 000 000 participants. It is worth mentioning that the city is always ready for large amounts of guests thanks to the well-developed accommodation facilities (56 hotels classified in star rating, with space for 9 760 guests).

** Antal Report: "Activity of professionals and managers in the labor market in Poland", January 2017

*** Foreigners in Poland, November 2016

**** Numbeo.com



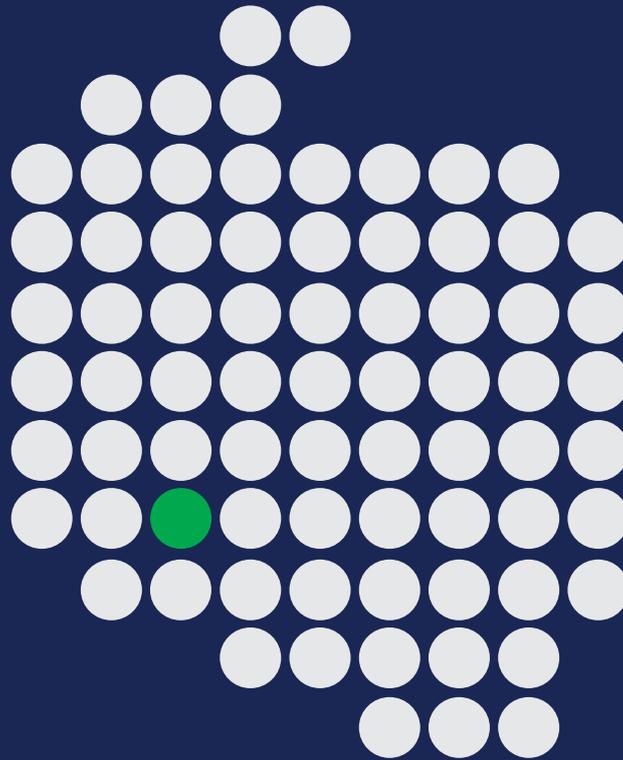
Wroclaw: Winner

FDI Strategy in fDi Polish
Cities of the Future

2017/2018



www.get-to-the.pl



www.get-to-the.pl

Wroclaw Agglomeration Development Agency
Business Support Centre
araw@araw.pl
office@invest-in-wroclaw.pl
+ 48 71 78 353 10



**European
Funds**
Regional Programme



**LOWER
SILESIA**

European Union
European Regional
Development Fund



The project is subsidised by the European Union from the European Regional Development Fund as part of the Regional Operational Programme of the Dolnośląskie Province 2014–2020.