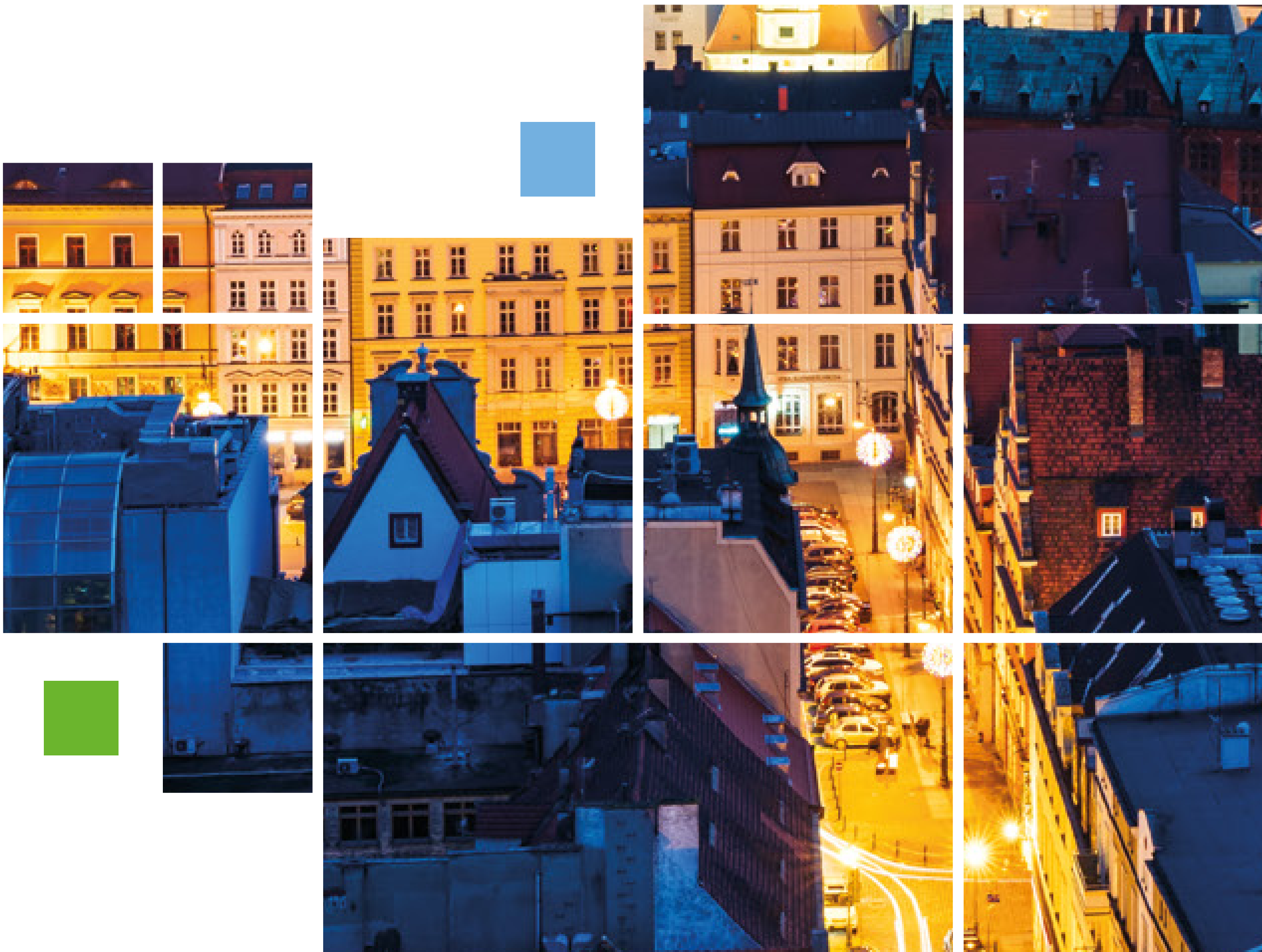
Wrocław the meeting place

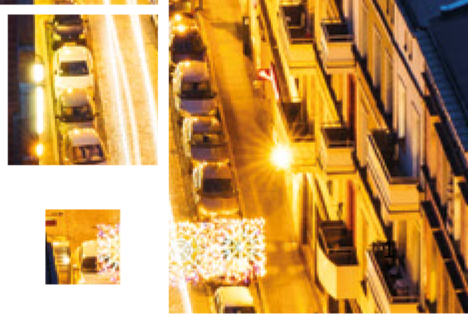
DRIVEN BY

KNOWLEDGE PEOPLE & INNOVATION



ARAW Wroclaw Agglomeration Development Agency

Invest in Wroclaw



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Other websites by ARAW:

www.live-in-wroclaw.com
www.study-in-wroclaw.pl
www.wroclaw.pl

/ Why Wroclaw?

Perfect location and connectivity

Located in the heart of Europe, and accessible by car in less than 4 hours from Warsaw, Berlin or Prague, Wroclaw is a perfect investment location. A constantly developing railway network supports both passenger traffic and freight transport, while direct flights to nearly 50 destinations make it even easier to travel round the world.

Competent and creative talents

The metropolitan area of Wroclaw, inhabited by 1,200,000 people, is a great source of educated specialists whose knowledge and skills, together with their great command of foreign languages, are highly appreciated by companies from all sectors.

Recognised university hub

Wroclaw is the third largest academic centre in Poland. 28 universities, including 108,000 students in engineering, IT, F&A, linguistics and other majors, bring over 26,000 graduates to the local labour market each year. Unique on the national scale is a recent official announcement – the presence of the Coventry University Wroclaw Branch.

Innovation and creativity

Thirst for knowledge and rapid growth drive Wroclaw creativity. IT, biotechnology, engineering, chemistry and pharmaceutical sectors are just a few industries represented in the region by large international brands, as well as locally established startups. Great support offered by over 30 incubators and coworking spaces, together with vast networking events at hand, foster the creation of yet more micro businesses.

High quality of life

European Capital of Culture 2016 and Best European Destination 2018, Wroclaw is a fantastic place to live, study and work. Its rich and diverse cultural offer will allow everybody to find the best means of entertainment within the most preferable surrounding – be it a park, the Old Town with its Market Square, the historic Cathedral Island of Ostrów Tumski or any other place.

Business friendly

The supportive attitude of the city is very much appreciated by both local business and foreign direct investments (FDI). Moreover, the activities of Wroclaw Agglomeration Development Agency – the first such institution in Poland providing extensive support during the investment process, as well as offering a vast range of aftercare activities – are recognised and noticed by other cities.

Wroclaw - soft landing guaranteed

We provide top quality support for foreign and Polish businesses not only during the investment process but also long after the entity has established its activity in the region. Our knowledge, experience, and network are at your service.

Our one-stop shop approach

1

Knowledge

ARAW continuously monitors, collects and delivers data about the economy and business in Poland and Wroclaw.

2

Networking

The agency connects investors with local authorities, companies, service providers, universities, and other relevant organisations.

3

Individual approach

Each FDI project is different and thus receives an accountable PM who coordinates all related work, streamlines procedures and paperwork.

4

Reports & Analysis

ARAW regularly distributes relevant business data and news to all partners, but also prepares and publishes reports.

5

Visits

Investors receive all necessary support in scheduling and organising their visits in and around Wroclaw.

Welcome

6

Business set up

Investors receive help with establishing their business in Wroclaw.

Decision

7

PR & Branding

ARAW also advises on and provides support in initial public relations and employer branding activities of recently launched investments.

8

Ongoing business support

Investors can count on comprehensive, ongoing support – even 80% of Investment Support Team work is dedicated to post-investment assistance.

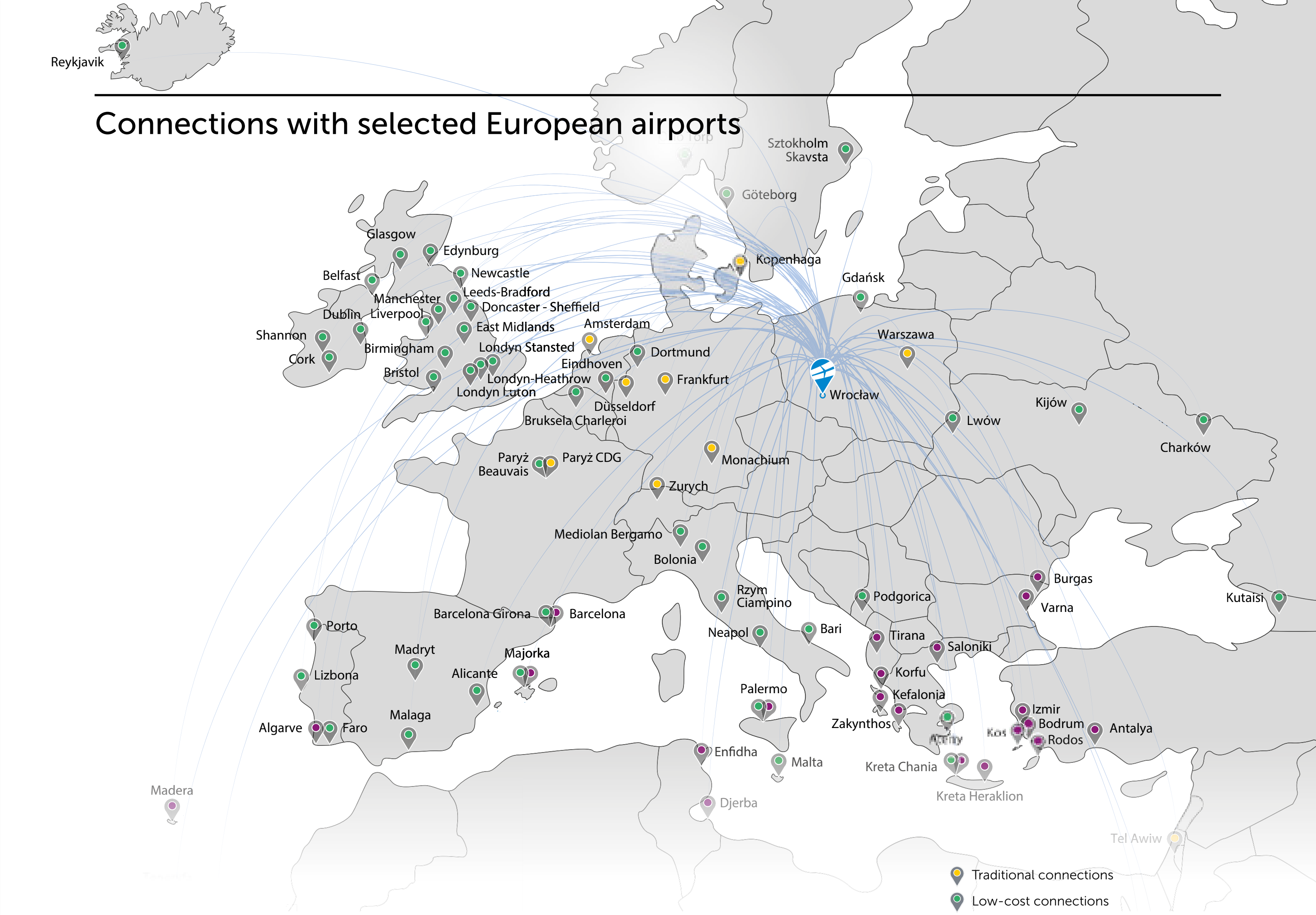
Wroclaw Agglomeration Development Agency

- **Comprehensive support for investors**
  Created at the turn of 2005 and 2006 to provide one-stop shop support for investors in the Wroclaw Agglomeration during the investment process.
- **Varied aftercare offer**
  Extensive range of post-investment activities that involve networking and ecosystem building to encourage technologically advanced projects – R&D, ICT, KPO, Industry 4.0, electromobility.
- **Pioneering project in Poland**
  First such institution in Poland, resulting from a cooperation between Wroclaw and 29 surrounding communes to foster business growth in the region.
- **Partner of the national agency**
  Local partner of the Polish Investment and Trade Agency (PAIH), which supports both the foreign expansion of Polish business and the inflow of the foreign direct investments (FDI) to Poland.
- **Experienced and successful**
  Until today, ARAW has successfully served over 200 FDIs, resulting in the creation of over 100,000 new jobs.
- **Awarded by international experts**
  Recognised by international expert institutions and organisations, like fDi Magazine (Financial Times Group), Emerging Europe, Forbes and many others.

Location & Connectivity

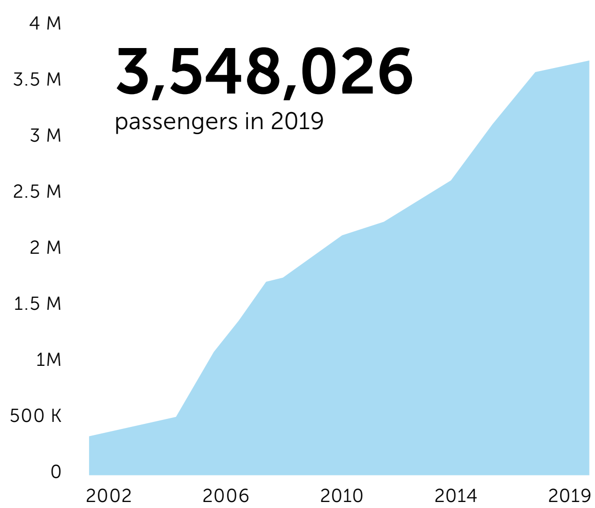
Wroclaw is situated strategically between Prague, Warsaw and Berlin, each reachable by car in less than 4 hours. Due to an excellent infrastructure – modern motorways, a constantly growing airport and an expanded railway network – the city is perfectly connected with the rest of the world. Numerous bus & tram lines, municipal car sharing systems of electric cars and electric scooters, together with the City Bike System, make it easy to move around Wroclaw quickly and encourage inhabitants to be eco-friendly.

Connections with selected European airports



More details: **www.airport.wroclaw.pl/en/**

Passenger traffic at the Wroclaw Airport



The best regional airport in Poland

The Wroclaw Nicolaus Copernicus Airport provides its services to network carriers such as Lufthansa, Swiss, Air France and KLM, low-cost carriers like Ryanair and Wizz Air, and also charter airlines hired by tour operators. With so many various operators, the airport offers a wide range of direct flights to major hubs across Europe (19 daily connections to Amsterdam, Copenhagen, Düsseldorf, Frankfurt, Munich, Paris, Warsaw and Zurich), 3 daily flights to London (Luton and Stansted) and flights to 17 of the largest capital cities of Europe. Due to the modern and functional terminal, alongside the comfortable network of connections, Wroclaw Airport is willingly chosen both by outbound travellers and visitors.

Growth

12 new connections in 2017
10 new connections in 2018
2 new connections in 2019
2 new connections in 2020

Comfort

Business Traveller Award
Best Regional Airport
2013-2017

Safety

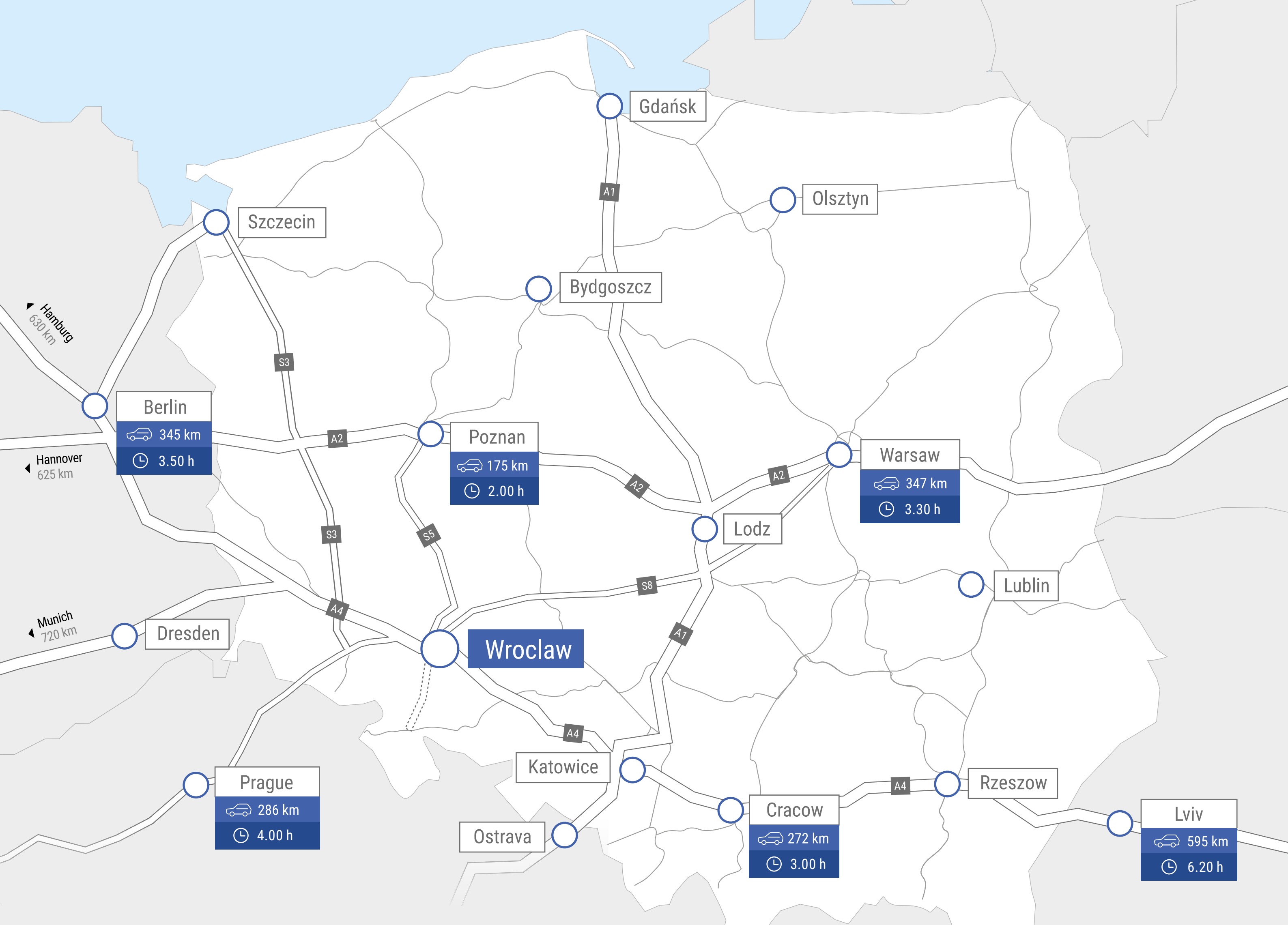
ILS CAT II landing support system. Best parameters among regional airports

Convenience

Only 10 km away from the city centre, parking spaces for 4,000 cars, Kiss&Fly zone, taxi, bus, shuttle bus

Driving time & distance to selected ports:

- Bremerhaven – 7 h, 760 km
- Hamburg – 6.5 h, 630 km
- Gdańsk – 5 h, 550 km
- Rotterdam – 9.5 h, 1,000 km



Polish transportation infrastructure

Poland has significantly upgraded its infrastructural network over the past decade, putting into use motorways and expressways with a total length of 4,132 km (2003-2018). Under the National Road Construction Programme (2014-2023), PLN 107 billion will be spent for the construction of 3,900 km of motorways and expressways, including 57 new ring roads. By 2025, we will achieve 6,145 km of motorways and expressways. Moreover, by 2023, PLN 67.5 billion will be spent upgrading the Polish rail network.

Wroclaw is the first Polish city to complete a planned network of motorways and expressways. Driving times to other major cities in the CEE region were greatly reduced, including: Warsaw (3.5h via S8 road), Szczecin (4.5h via S3 road), Dresden (2.5h via A4), Krakow (3h via A4), Poznan (2h via S5). Completion of the motorway ring in 2011 released the city centre of Wroclaw from transit-related traffic.

4,132 km

motorways and express roads built in Poland 2003-2018

6,145 km

planned motorways and express road length by 2025

PLN 67 billion

planned rail infrastructure investment in Poland by 2023

730 km

share of Polish roads in the Via Carpatia trail

Public transport system of Wroclaw

Wroclaw is one of the most innovative cities in Poland in terms of public transport. You can choose between buses, trams, city bikes, electric cars and scooter rentals, as well as the regional railway.

Mobility is recognised as a pillar of Wroclaw's Smart City strategy programme. The city is aiming for an integrated transport system, ICT and the development of eco-friendly solutions.

Every citizen has access to the URBANCARD system. Not only does it allow easy travel around the city, thanks to its prepaid system, but it also provides numerous discounts and facilities.

Key facts

Buses

99 bus lines

431 low-floor vehicles

Trams

23 tram lines

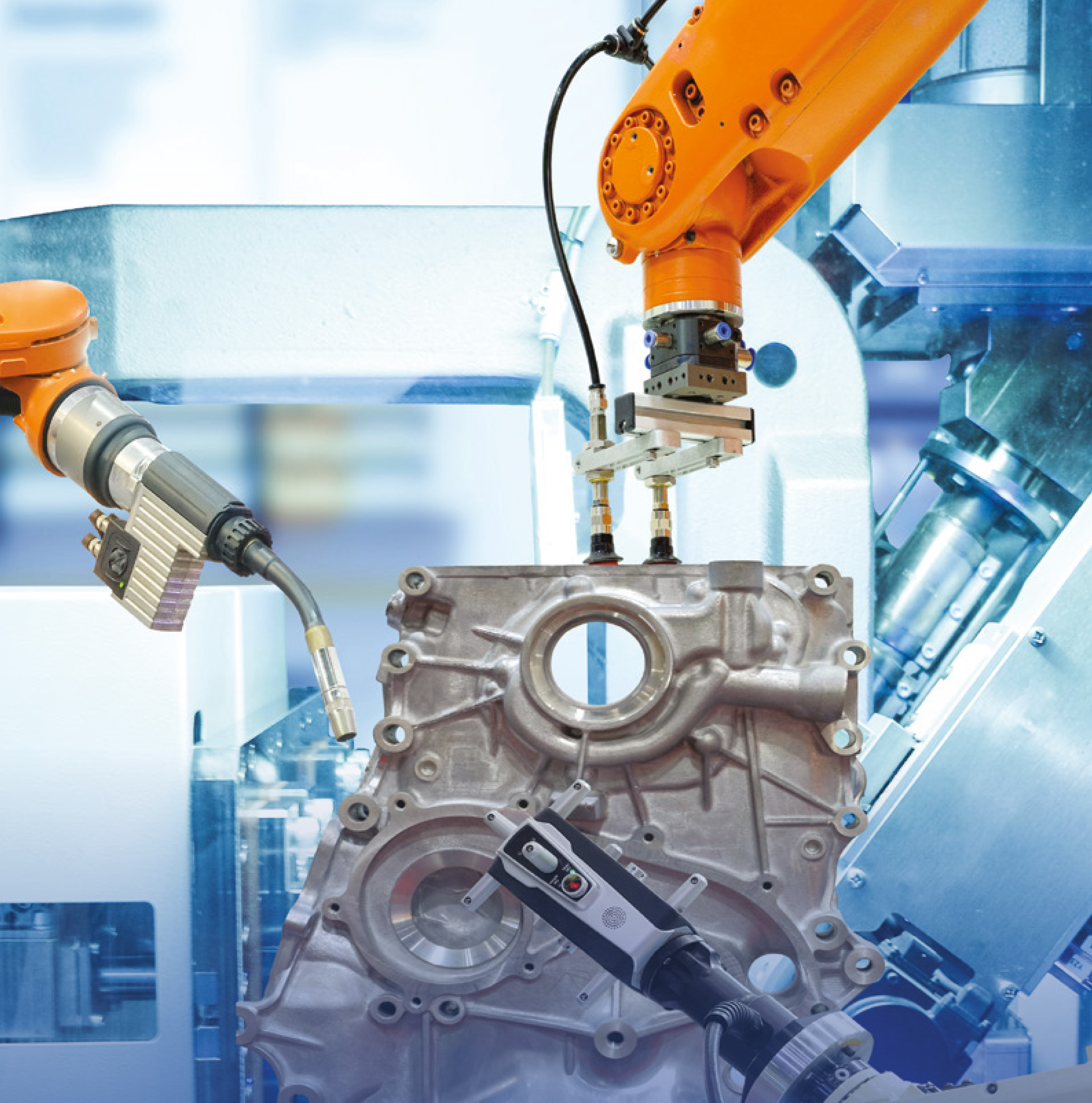
200 trams in rush hours

Bikes

435 km of bike lanes

2,000 bikes and 200 stations in the City Bike System

The railway network in Lower Silesia (2020/2021)



Strong economy

The economy of Wroclaw is based on knowledge of enterprises, which are focusing on providing professional, scientific and technical services. Significant intensification of activities can also be observed in industries such as automotive, mechanical engineering, pharmacy, modern business services, IT & ICT. The diversification of the market in Wroclaw is really unique and creates vast possibilities and opportunities for inhabitants.

Strong and Diversified Economy

Wroclaw is one of the largest and most developed cities in Poland. In the past few years, it has experienced tremendous progress in both economic and socio-cultural areas. What is also important is that Wroclaw belongs to the top cities when it comes to creating new jobs and increasing the quality of living of the citizens. The whole Lower Silesia region, which Wroclaw is the capital of, is also known as the most urbanised region in Poland.

Factors that have significantly impacted the development of the Wroclaw metropolis are, among others, its great location – especially the proximity to Germany and the Czech Republic leading further to the West and South of Europe, respectively – and well-developed infrastructure increasing the connectivity aspect. These and some more advantages of the region have attracted famous international brands of all sectors to the city.

Diversified labour market

Sustainable development in the region is focused on providing a high quality of life for current and future citizens, as well as on creativity, innovativeness and entrepreneurship. One of the most important aspects in the city's strategy is to not just improve mobility and quality of the environment, but also to increase the amount of foreign investors and to support new creative businesses entering our local market.

Modern Business Services

Wroclaw 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, proficient level of language skills and large quantity of modern office stock. The vast number of R&D centres together with strong IT and finance sectors are features that distinguish Wroclaw as a high-quality location.

52,500 employees in the modern services sector in Wroclaw

201 companies in the modern services sector

30+ languages spoken in Wroclaw service centres

1.24 M sqm of modern office stock

GBS: HR, F&A, Admin

3M / US
Amrest / PL
AXA XL / US
Axiom Law / US
Becton Dickinson / US
BNY Mellon / US
Credit Suisse / CH
Deichmann / DE
Delaval / SE
EY GDS / UK
Fortum / FI
Fresenius Kabi / DE
Fresenius Medical Care/ DE
Getsix Holding / DE
Google / US
HPE / US
HP Inc. / US
Kaufland / DE
Mahle / DE
Merck / DE
Olympus / JP
Qiagen / DE
Parker Hannifin / US
Pattonair / US
PPG / US
Santander Global Operations / ES
Schaeffler / DE
Smith+Nephew / UK
SSAB / SE
Toyota / JP
UBS / CH
UPS / US
Volvo / SE
ZF / DE

KPO

Allianz / DE
BNY Science / US
Crisil Irevna / IN
EY GDS / UK
McKinsey / US

BPO

Contract Administration / GB/PL
CSS Corp / US
DXC / US
Gates / US
Impel Business Solutions / PL
Xylem / US

Contact centre/ Debt Collection

ACN / US
CCIG / PL
Intrum / SE
KRD / PL
Kruk SA / PL
Lindorff / NO
Pyszne.pl / PL
Qatar Airways / QA
Santander Consumer Bank / ES
Ultimo / PL

R&D IT

CD Projekt Red / PL
Diehl Controls / DE
Dolby / US
Etteplan / FI
Gigaset / DE
GlobalLogic / US
LiveChat / PL
Neurosoft / PL
Nokia / FI
Opera Software ASA / NO
DataWalk / PL
Optiva / CA
Red Embedded Group / UK
Ryanair Travel Labs / IE
S3 / IE
Techland / PL
UNIT4 / NL
Viessmann / DE

IT services

Accenture / US
Alfa-Net / PL
Altimi Solutions / PL
Aptitude Software / UK
Atos / FR
Avenga IT Professionals / PL
AxiomSL / US
Birlasoft / IN
BTech / PL
Capgemini / FR
Ciklum / DK
Clearcode / PL
Codelab / PL
Code Poets / PL
Cogniance / US
Comarch / PL
CrazyCall / PL
Criteriamx / AT
CSS Corp / IN
DataArt / US
Divante / PL
Duco / US
Epam Systems / US/BY
Epiq Systems / US
FrameLogic / PL
Gorilla Group / US
HCL / IN
Hicron / PL
Infor / US
Infosys / IN
Infusion / US
InsERT / PL
Intive / PL
Kyndryl (IBM) / US
Luxoft / CH
Mphasis / US/IN
NBC / PL
NeuroSYS / PL
Objectivity / US
Ocado / UK
OpsTalent / UK
QAD / US
Quality Task Force / CH
PGS Software / PL
RST / PL
Ryanair Travel Labs / IE
Sente / PL
SI Consulting / PL
Sii / FR
S3 Group / IE
Softserve / UA
Spyrosoft / PL
Sygnity / PL
Talex / PL
Thaumatec / PL
Tieto / FI
Tigerspike / AU
ToopLoox / PL
Transition Technologies / PL
Unic / CH
Unity / PL
VM.PL / PL
Volvo IT / SE

Selected Wroclaw Startups

Ada
Bioavlee
Bioceltix
Biotts
Blebox
Brand24
byteLAKE
BZB UAS
Carly
ChallengeRocket
Cryptomage
Datarino
Drivebox
Droids on Roids
Drying Process
Encedo
Explain Everything
Flash Robotics
Funmedia
Genomtec
Giant Lazer
Identt
Infermedica
Kadromierz
Laparo
LeoRover
Liga Niezwykłych Umysłów
Look4App
Meeting Application
Monterail
Nestmedic
Piwik PRO
Proa Technology
ProxiGroup
Pure Biologics
QNA Technology
SatRevolution
Saule Technologies
Scanway
SensDX
Smabbler
Syntoil
TestArmy
TimeCamp
Tooploox
VR Global
Woodpecker
Zeccer
Zmorph
zrzutka.pl

Source: ABSL report 2021, ARAW own survey, Knight Frank

/ Manufacturing sector

Lower Silesia and its capital – Wroclaw – make up one of the top manufacturing hubs in Poland. Large numbers of foreign companies, extensive skills and qualifications of employees, and innovativeness including industry 4.0 solutions, result in one of the highest levels of productivity in the country. The sector's strength and diversity are shaped by the presence of the world's leading industries – automotive, white goods, engineering, aerospace, pharmaceutical and chemical.

341,000 employees in the manufacturing and construction sector in the region

2.7-3.9
headline rent € / sqm / month (Q3 2020)

2.59 M
sqm of modern warehouse/ manufacturing space (Q3 2020)

184,700
sqm of industrial and logistic space demand in Q1 2021

Automotive

AKS Precision Ball / JP
Autoliv / SE
BASF / DE
Robert Bosch / DE
Carcoustics / DE
Chassis Brakes / US
Daimler / DE
Eto Magnetic / DE
Faurecia / FR
Garmin / US
Gates / US
Gestamp / ES
GKN / UK
Govecs / DE
GTHR / CN
Industrias Alegre / ES
Lear / US
Leoni / DE
LG Energy Solution / KR
NSK / JP
Pittsburgh Glass Works / US
Ronal / DE
Sanden / JP
Simoldes Plasticos / PT
Sitech / DE
Teknoware / FI
Toyota / JP
Vibracoustic / DE
Volkswagen / DE
Volvo / SE
ZF / US

Aerospace

Becker Avionics / US
Collins Aerospace / US
Paradigm Precision / US
Radiotechnika Marketing / PL
Ryanair / IE
Unison GE / US
XEOS / US/DE

Electronics / White goods

Asplex / TW
Bafang Electric / CN
BSH / DE
Dongseo / KR
Electrolux / SE
Elica / IT
Heesung / KR
Hemmersbach / DE
Ilpea / IT
Italmetal / IT
Komsa / DE
Lapp Kabel / DE
LG Display / KR
LG Electronics / KR
LG Innotek / KR
MSI / TW
Posco / KR
TelForceOne / PL
USI Poland / TW
Vestel / TR
Wago Elwag / DE
Whirlpool / US

Mechanical Engineering

Aluwind / DK
Bombardier / CA
Boart Longyear / US
Danfoss / DK
DeLaval / SE
GEPower / US
HACO / BE
KGHM Zanam / PL
Midroc Alucrome / SE
Parker Hannifin / US
Rawlplug / PL
Siemens / DE
Toya / PL
Vorwerk / DE
Viessmann / DE

Food processing

Bama / US
Bulk Powders / US
Cargill / US
Lorenz Snack-World / DE
McCain / CA
Mondelez / US
Nestle Purina / US
Nordis / PL
PPO Siechnice / PL
Sonko / PL
Tarczynski / PL
Wratislavia / PL

E-commerce / Logistics

AB SA / PL
Amazon / US
Crusar / PL
DHL / DE
DSV Panalpina / CH
Kuehne + Nagel / CH
MBS Logistics / PL/DE
Pattonair / UK
Raben / NL
Schavemaker / NL
Rohlig Suus / PL
THG / UK
Tim / PL
Trans.eu / PL
UPS / US

Chemical / Pharmaceutical

3M / US
BASF / DE
Colgate-Palmolive / US
Clarena / PL
E&S / ES
Hasco-Lek / PL
Herbapol / PL
LG Energy Solution / KR
Linde Gaz / DE
MacoPharma / FR
Materialise / BE
Oleofarm / PL
Paragon Medical / US
PPG / US
PCC SE / DE
Selena / PL
S-Lab / PL
USP Zdrowie / PL

R&D industrial

3M / US
Align Technology /US
Autoliv / SE
Balluff / DE
DeLaval / SE
Novasome / PL
LG Electronics / KR
KGHM Cuprum / PL
Mondelez International / US
PCC Rokita / DE
Shindetek /CN
Sitech / DE
Robert Bosch / DE
Collins Aerospace / US
XTPL / PL

Source: ABSL report 2021, ARAW own survey, CBRE

/ Innovation Driven City

Vivid startup community

Wroclaw is not only a recognised IT and R&D hub but also the second largest startup ecosystem in Poland. ICT innovations that are developed here, together with the advancement of technologies and solutions in the fields of new materials and fuels, as well as biological and nano-technologies (to mention just a few selected areas of interest) play a significant role in creating a knowledge-based economy.

200+

startups in Wroclaw

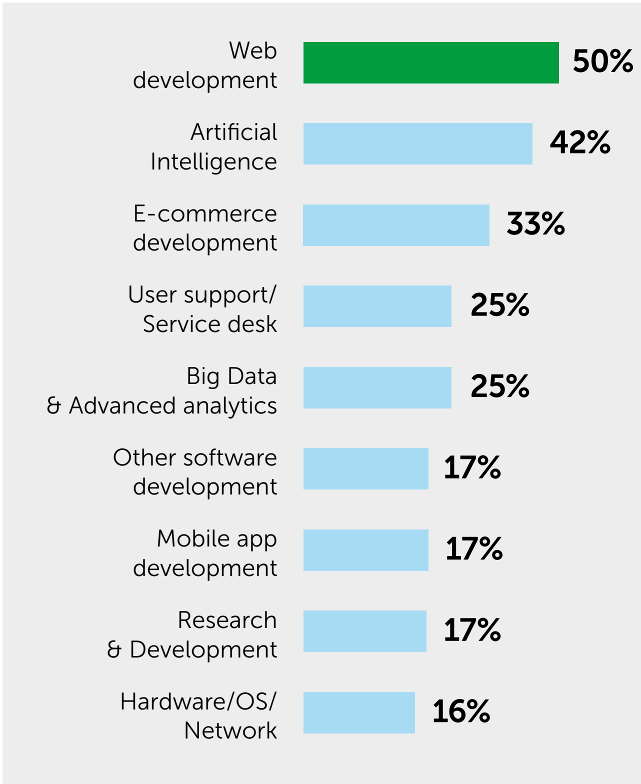
City with
the highest
startup concentration in Poland

5 Polish Innovators Under 35 (MIT)

- Olga Malinkiewicz – Saule Technologies
- Patrycja Wizińska-Socha – Nestmedic
- Krystian Piećko – DataWalk
- Jan Kędzierski – Flash Robotics
- Jerzy Łątka – Archi-tektura.eu

MIT Technology Review

The most common fields of activity among Wroclaw startups*



Selected Wrocław startups and their successes

XTPL – The Best Polish Startup (Presidential Economic Award 2017)

Saule Technologies – Social Impact Award (Deloitte Technology Fast 50 Central Europe 2018)

Syntoil – 2nd place globally (Chivas Venture 2019)

Tooploox, Luxon LED, Monterail (Financial Times 1000 Europe's Fastest Growing Companies 2019)

Infermedica, Genomtec (Top 5 InCredibles 2018)

Codedose, Piwik PRO, Luxon LED, Time Solutions, Saule Technologies (Deloitte Technology Fast 50 Central Europe 2018)

Tooploox, Droids on Roids, Monterail, Brand24, Divante, Luxon LED (Deloitte Technology Fast 500 EMEA 2017)

* Report 2019 - Wroclaw IT sector

Exquisite R&D facilities

Exquisite R&D facilities Complex and varied infrastructure available in the city facilitates the creation of innovative and services, alongside enabling the conduction of research projects. Wroclaw research centres offer state-of-the-art laboratories and equipment, as well as international specialists to operate the labs and support. Wroclaw academic hub forms a platform for the government, local academia and the city's business society to come together to encourage knowledge transfer and growth in R&D activities.

100+
R&D and IT centres

50+
accredited labs

30+
incubators
and coworking spaces

Main research areas:

- Information Technology
- Engineering
- Chemistry & Pharmaceutics
- Biotech & Nanotech

Selected research institutions/units	
HAK LLC Research and Development Centre	https://cbrhak.pl/
Institute of Energy Systems Automation in Wroclaw	http://www.iase.wroc.pl/
KFB Acoustics	http://kfb-acoustics.com/
KGHM CUPRUM Research and Development Centre in Wroclaw	https://kghmcuprum.com/en/
L. Hirszfeld Institute of Immunology and Experimental Therapy PAN	https://www.iitd.pan.wroc.pl/
Łukasiewicz Research Network - Electrotechnical Institute Division of Electrotechnology and Materials Science	http://www.iel.wroc.pl/?Language=EN
Łukasiewicz Research Network – PORT Polish Center for Technology Development	https://www.port.org.pl/en/
Machinefish Materials & Technologies	https://machinefish.pl/en/
Military Institute of Engineer Technology	https://www.witi.wroc.pl/pl/
Poltegor Institute	http://www.igo.wroc.pl/en/
Pracownia Hałasu	http://www.pracowniahalasu.pl/
Research and Development Centre Novasome LLC	https://novasome.pl/en/
Research and Development Centre, Provincial Specialized Hospital in Wroclaw	http://www.wssobr-wroc.pl/
University of Wroclaw	https://uni.wroc.pl/en/
W. Trzebiatowski Institute of Low Temperature and Structural Research PAN	https://www.intibs.pl/en/
Wroclaw Centre of Technology Transfer	https://wctt.pwr.edu.pl/en/
Wroclaw Medical University	https://www.en.umed.wroc.pl/
Wroclaw Technology Park	https://www.technologpark.pl/en/
Wroclaw University of Economics and Business	http://www.ue.wroc.pl/en/
Wroclaw University of Environmental and Life Sciences	https://upwr.edu.pl/en/
Wroclaw University of Science and Technology	https://pwr.edu.pl/en/
ZEC Diagpom	https://www.diagpom.pl/index.html
Zespół Elektrociepłowni Wrocławskich KOGENERACJA S.A.	http://www.kogeneracja.com.pl/en/

Vibrant Academic Centre

Wroclaw is the third largest academic centre in Poland, attracting young people from all over the country, Europe and even further destinations. Each year, both public and private universities educate nearly 108,000 talented individuals, who are very much appreciated by the local business. Students start their cooperation with companies during their 2nd and sometimes even 1st year of studies, whereas part time employment during 3rd or later years is almost a rule.

Picture taken at SWPS University (Wroclaw)

108,000 students in Wroclaw

26,400 graduates annually

28 universities & higher education institutions

8,220 foreign students in Wroclaw

96% students speak English

Number of students of important majors in Wroclaw

9,500 ITC & related

26,200 Engineering

24,000 F&A, Management, Administration

5,500 Language studies

3,800 Law

Biggest universities in Wroclaw

Wrocław University of Science and Technology

Wroclaw University of Economics and Business

Uniwersytet Wrocławski

Wroclaw University of Science and Technology

The top technical university in Poland with approximately 21,000 students being educated by 2,200 academic teachers in 13 faculties. The graduates are highly valued on the labour market.

Wroclaw University of Economics and Business

There are over 10,100 students enrolled at the university. 76% of the graduates find employment within the first 3 months after graduation. WUE is ranked among the top economic higher education institutions in Poland.

University of Wroclaw

One of the universities with the longest tradition in Poland. Throughout its longer than 300-year-history, it has produced 9 Nobel Prize winners. At present, there are almost 23,000 students studying at 10 faculties.

Over 100 student scientific clubs in Wroclaw

ARES team & HyperCells project

An interdisciplinary project bringing together students from three universities in Wrocław. The main area of research is the activity of human cells in the stratosphere.

FEB Business Education Forum

Their mission is to educate students' business competencies and combine the experience of business practitioners with academic knowledge.

Scientific Club of Chemists "Jeż"

The club supports and conducts scientific and research work as well as disseminates knowledge in the field of chemistry and other natural sciences.

Project Scorpio

Scorpio projects focus on the design and development of innovative Mars rovers.

Rapid Troopers

The focus is on innovative technologies, CAD design of machines and devices, and project management.

PWR Racing Team

One of the best teams in the world when it comes to creating a new racing car each year.

PWR Solar Boat Team

Answering the need of the city for the public water transport, this club constructs boats driven by photovoltaic panels.

PWr Aerospace

The club brings together students interested in space exploration. Their creative projects consider stratospheric balloons, rockets, satellites and many others.

SAPer

A group of enthusiasts wishing to learn about SAP solutions and the specificity of implementation projects.

Things you have to know about Wroclaw's labour market

Talent Pool

With more than 1,200,000 inhabitants in the metropolitan area, Wroclaw is the largest socio-economic centre in southwestern Poland. This number is also predicted to stay almost unchanged in the next 30 years, thanks to the constant inflow of new inhabitants.

Universities

108,000 students at 28 universities, with 26,400 graduates annually, make Wroclaw the 3rd largest academic centre in Poland. Strong faculties in the fields of engineering, ICT, F&A and linguistic are the perfect source of employees.

Dynamic economic growth

In the years 2006-2016, the City of Wroclaw's GDP per capita has doubled, while the GDP per capita of the surrounding counties has grown by 125%, from PLN 22,300 to PLN 50,600. It was the fastest growing subregion in Poland at this time.

Foreign languages

Education First in 2019 ranked Poland 11th out of 100 countries in the world in terms of English proficiency. As far as language command in Wroclaw is concerned, nearly 100% of students speak English. Moreover, there are more than 30 foreign languages spoken in the business service centres in the city.

Attractive to foreigners

There were over 60,600 foreigners working on employment contracts in Lower Silesia in 2019, which is the 3rd largest number in Poland. The number is also steadily growing. In years 2015-2019 number of work permits issued to foreigners from outside the EU stood at respectively 3,388, 10,880, 12,284, 19,158 and 23,907.

Falling unemployment

The unemployment level in the City of Wroclaw fell from 5.5% in 2010 to 1.7% in November 2019. Whereas in the Lower Silesia Region the unemployment rate amounted to 4.5% in the same period of time.

Salaries

Gross monthly salary level in EUR (EUR 1 = PLN 4.5) for selected positions (Source: Hays Salary Survey 2021)

General Ledger in SSC/BPO

Role	Salary € / month
Junior Accountant	950 – 1,100
Accountant	1,200 – 1,650
Senior Accountant	1,650 – 2,200
Team Leader	2,200 – 3,550
Process Manager	3,550 – 4,450

Manufacturing Plant

Role	Salary € / month
Plant Manager	5,550 – 8,900
Production Manager	3,350 – 5,100
Shift Leader (Mistrz)	1,550 – 2,200
Quality Process Engineer	1,550 – 2,200
Production / Process Engineer	1,450 – 2,200

Supply Chain (Logistics, Planning, etc.) in SSC/BPO

Role	Salary € / month
Junior Specialist	1,050 – 1,300
Specialist	1,300 – 1,600
Senior Specialist	1,600 – 2,000
Team Leader	2,200 – 3,100
Process Manager	3,350 – 4,200

Manufacturing Plant

Role	Salary € / month
Lean Manufacturing Engineer	1,900 – 2,450
R&D Engineer	2,200 – 3,100
Purchasing Specialist	1,550 – 2,200
Logistics Specialist	1,350 – 2,000
HR Specialist	1,100 – 2,000

Software Development

Role	Salary € / month
C/C++ Junior Developer	1,350 – 2,000
C/C++ Developer	2,000 – 4,000
C/C++ Senior Developer	2,650 – 5,150
C/C++ Team Leader	3,100 – 5,350
Java Junior Developer	1,800 – 2,450
Java Developer	2,650 – 3,550
Java Senior Developer	3,550 – 4,650
Java Team Leader	4,200 – 5,350

IT Support / Helpdesk

Role	Salary € / month
1st Line Support	900 – 1,100
2nd Line Support (1 – 3 years of experience)	1,200 – 1,800
2nd Line Support (3 – 5 years of experience)	1,800 – 2,650
3nd Line Support	2,450 – 3,100
Team Leader	2,450 – 3,100
Service Desk Manager	2,900 – 4,000

All salaries – gross

Bonuses & benefits offered by companies in Wroclaw (€/month)

25€ Private medical care

15€ Sports card

12€ Life insurance

40€ Co-financed meals (Sodexo)

35€ Retirement Plan

115€ Christmas Package (annual)

50€ Gifts for special events (annual)

BLUE-COLLAR WORKERS (€/month)

45€ Transport

15€ Holiday allowance

35€ Training allowance

up to 50€ Attendance bonus

up to 20% of salary Monthly performance bonus

WHITE-COLLAR WORKERS (€/month)

7€ Company phone

15€ Company laptop

1 monthly salary Financial bonus (annual)

50€ Company car*

Labour market: Numbers to know

578/622 EUR / month
Minimal wage in 2020/2021 (1 EUR = 4.50 PLN)

13,784.81 EUR / annum
National average salary

150 h overtime
No more than 150 hours per person per year

40 hours
Working week

13 days
Number of public (state) holidays

20/26 days
Length of vacation leave (depending on seniority)

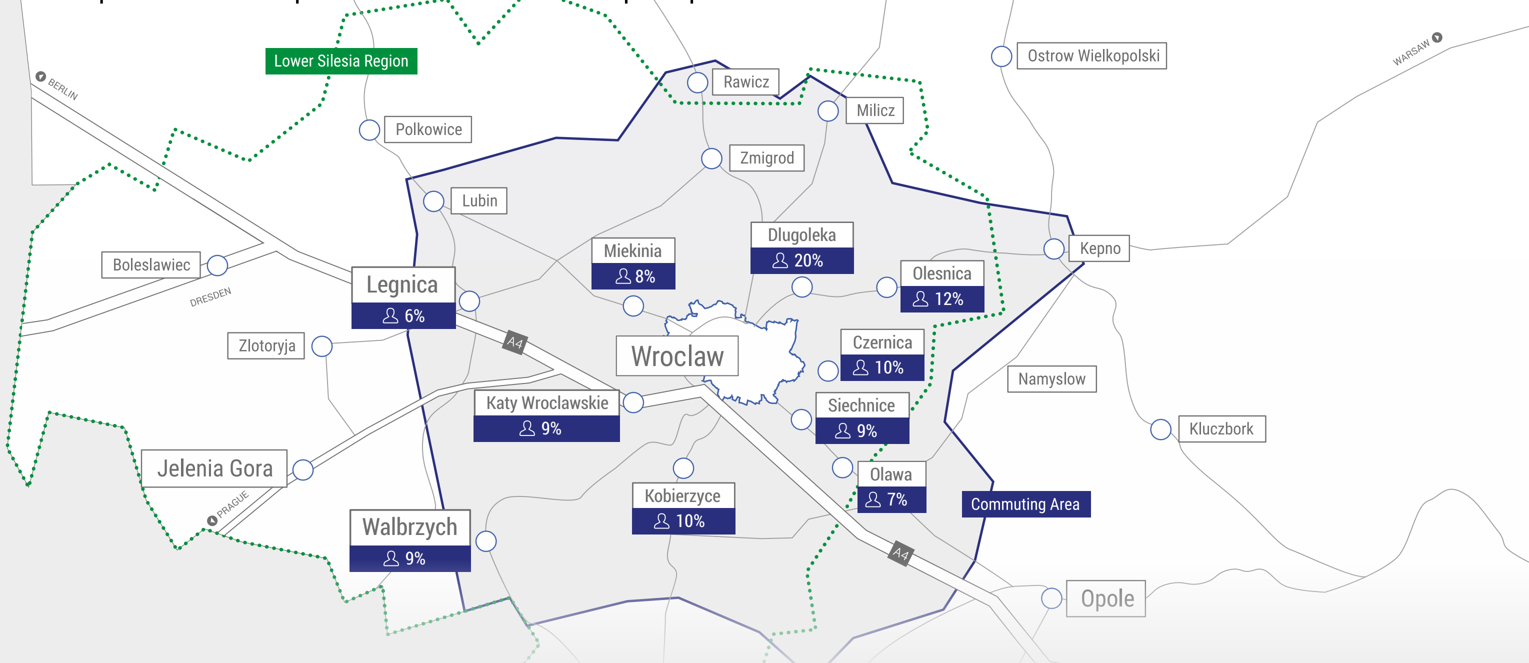
Average employer costs are approx. 20% on top of gross salary

Notice period depends on the employment period

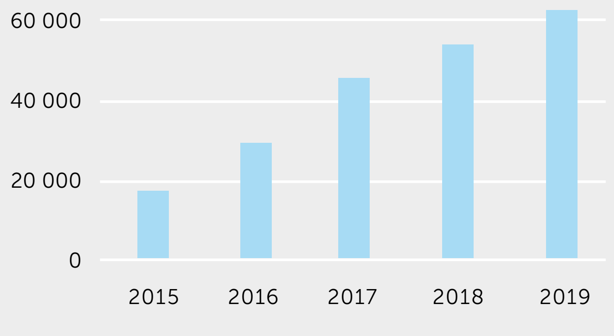
- 1 month if employed > 6 months and < 3 years
- 3 months if employed > 3 years

* Premium benefit for managers

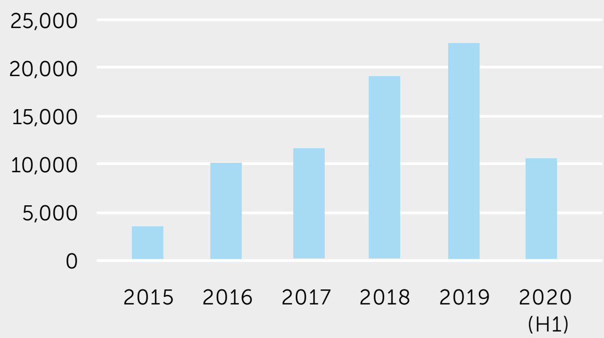
Top 10 municipalities from which people commute to Wroclaw



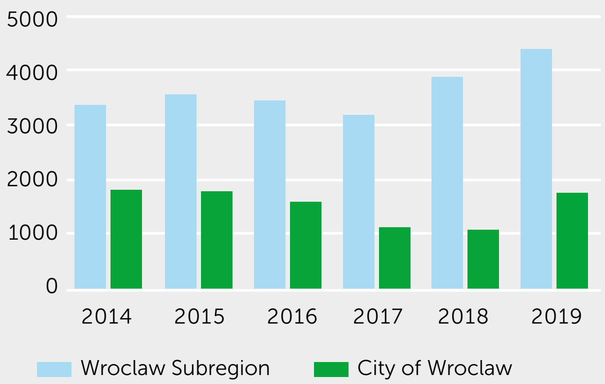
Number of foreigners on employment contracts in Lower Silesia



Number of work permits for foreigners from outside of EU in Lower Silesia



Net migration into Wroclaw city and Wroclaw subregion (migrations for permanent residence)



Employers' national insurance contributions

National insurance	**Employer's contribution for salary up to EUR 33,244**	**Employer's contribution above EUR 33,244**
Pension	9.76%	-
Annunity	6.50%	-
Sickness	-	-
Injury	0.67-3.33%	0.40-3.60%
Unemployment	2.45%	2.45%
Employee Guaranted Fund	0.10%	0.10%
Health	-	-

Sources: Central Statistical Office, Social Security Office, Ministry of Family, Labour and Social Policy.

Wroclaw

52

parks in Wroclaw. The eco-friendly side of Wroclaw is also reflected in the expanded City Bike System.

5,200,000

participants in the European Capital of Culture 2016 projects. 170,000 people were engaged in the preparation of 2,000 projects.

over 100

years old UNESCO historical complex - Centennial Hall.

20

bridges, footbridges, f
underground passage
considered the Ve

much more than business

over 400

dwarves live in the city. It is a symbol of the artistic and social movement "Orange Alternative" and a huge tourist attraction.

184,000

cubic metres of Africa inside the Wroclaw ZOO attraction - Africarium.

00

flyovers, tunnels, and
es - Wroclaw is often
nice of the North.

42,771

spectators supporting Śląsk Wrocław - the local football club.

Setting up a business

The vast majority of Polish laws are codified and the legal system is based on continental European civil law principles. Poland is still improving the country's business climate, simplifying legislation and introducing the digitalisation of procedures.

/ Doing business in Poland

To start a new company or expand an existing business into another country, an investor needs to know the rules that apply to this new territory. Setting up a business in Poland is a straightforward process and procedures are based on a transparent system that seeks to facilitate the incorporation of new enterprises.

Key regulations

A foreign investor intending to start business activity in Poland, depending on the type of company, should consider the following regulations:

- The Commercial Companies Code
- The Civil Code
- The Entrepreneurs' Law

Most popular forms of business activity of foreign investors – comparison of main aspects

	Limited liability company	Joint stock company	Limited partnership	Limited join stock partnership	Branch of foreign entity
Purpose	To conduct business as well as any legally permissible purpose	To conduct business on a large scale	To conduct business under its own name	To conduct business on a smaller scale (i.e. large family business)	To only conduct business in the scope of the foreign company's activities.

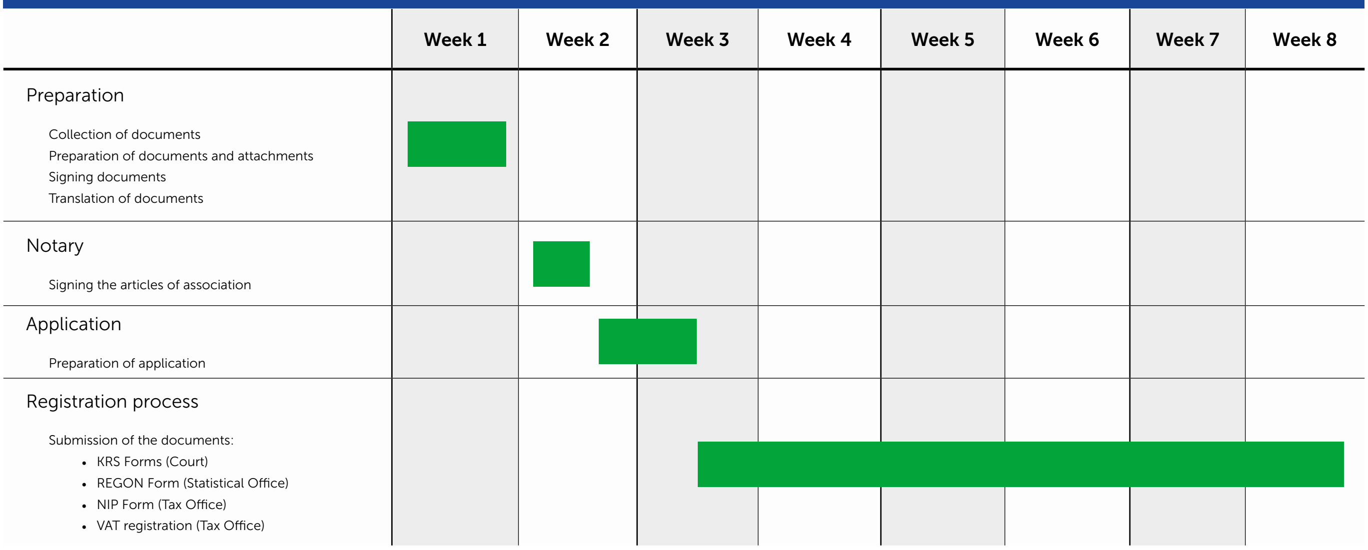
Limited liability company

A limited liability company is the most attractive and the most common legal form for foreign investors conducting business in Poland. Therefore, the following explanations will focus on the LLCs.

The biggest advantages of an LLC in comparison with other legal forms in Poland are:

- relatively low costs of incorporation of the company and low operational costs, limited liability and low minimum share capital
- the company may start business activities immediately after signing the articles of association
- fast registration process at the court
- clear and simple rules in relation to the daily management of the company
- shareholders are not personally liable for corporate liabilities but are compelled to pay the share capital
- minimum founding capital - only PLN 5,000

Timeline and steps needed to establish a limited liability company in Poland



/ Taxes

Corporate Income Tax (CIT)

19%	9%*	20%	5%**
income of the capital companies and the limited joint-stock partnerships		withholding tax on non-resident's income earned in Poland on certain types of transactions	income concerning intellectual property which will be created, developed or upgraded by a taxpayer within its R&D activity – so-called Innovation Box

* Small taxpayers (whose gross income did not excess EUR 2.0M in a year) or taxpayers commencing business activities.

** Income concerning license agreements, sale of IP, sale of products with IP or compensation from infringement rights of IP

Personal Income Tax (PIT)

17%	32%	19%	20%	Exempt
• for the income up to PLN 85,528	• for the surplus over PLN 85,528 the tax-exempted amount is currently – max PLN 8,000 per year	• business activity (self-employed) – after submitting the declaration on the linear taxation • capital gains, interests	• withholding tax on non-resident's income earned in Poland on certain types of transactions	some types of income, such as: • return of business trip costs • expenses incurred by an employer for enhancement of qualifications of his or her employees • the value of some benefits paid by an employer

Tax on goods and services – VAT

23%	8%	5%	0%	Exempt
• basic activities (all besides the below mentioned)	• delivery of some goods and services specified in the Act on VAT	• delivery of some goods and services specified in the Act on VAT	• export of goods • intra-community delivery of goods • international transport	• some used goods • financial services

Real Estate Tax

Real estate tax rates are established individually by local law. The national law sets the maximum rate for real estate tax:

- **Industrial / Commercial Land**
  0.99 PLN/sqm annually
- **Industrial / Commercial Building**
  24.84 PLN/sqm annually
- **Structures**
  2% of the initial asset value annually

Section partner JP Weber supporting decision makers

/ Incentives for investors

R&D tax relief

R&D tax relief allows taxpayers conducting Research and Development activities for an additional "deemed" deduction of up to 100% of the expenses incurred in relation with R&D activities from the taxpayers' tax base. The annual deduction of eligible expenditures cannot exceed the amount of income in a given tax year, however, the excess of tax relief available may be utilised by the taxpayer within 6 consecutive tax years.
The wider catalogue of qualified costs is available to entities with the R&D centre status. R&D centres are also entitled to a deduction of up to 150% of the qualified costs incurred.

Innovation Box

Innovation Box allows a 5% tax rate (instead of the standard 19% rate) to be applied to the income derived from qualified IP rights (QIPR). This tax preference applies provided that a taxpayer conducts R&D activity related to development, creation or improvement of a given intellectual property component. In order to benefit from the relief, the taxpayer will be obliged to separate the income from QIPR in his accounting books.

R&D tax relief & innovation box – key facts

R&D TAX RELIEF

- Easy-to-apply tax instrument for R&D activity
- Deduction of 200% of certain costs from the tax base (250% for R&D Centres)
- Benefits regardless of the company size
- Long-term tax benefit - may be applied within the period of 6 consecutive tax years

INNOVATION BOX

- 5% Tax Rate for qualified income related to sale or licensing of IP rights
- Invent & Commercialise – sell it in Poland and enjoy a low tax rate
- Covers most popular IP rights
- Long-term tax benefit – applicable during the lifespan of the IP rights

The R&D relief can be combined with the IP BOX relief = it can bring measurable tax benefits.

The Polish Investment Zone – key facts

Benefits
Tax exemption for up to 15 years

Operating body
14 Special Economic Zones (SEZ)

Investment area
Any location in Poland (public and private land)

Evaluation criteria
Both **qualitative** and **quantitative** criteria matched with specific location conditions, must be fulfilled

Qualitative criteria

In addition to the minimal investment costs, the qualitative criteria have to be met. Industrial investments have slightly different points to be fulfilled comparing with service-based equivalents

- sustainable economic development
- sustainable social development.

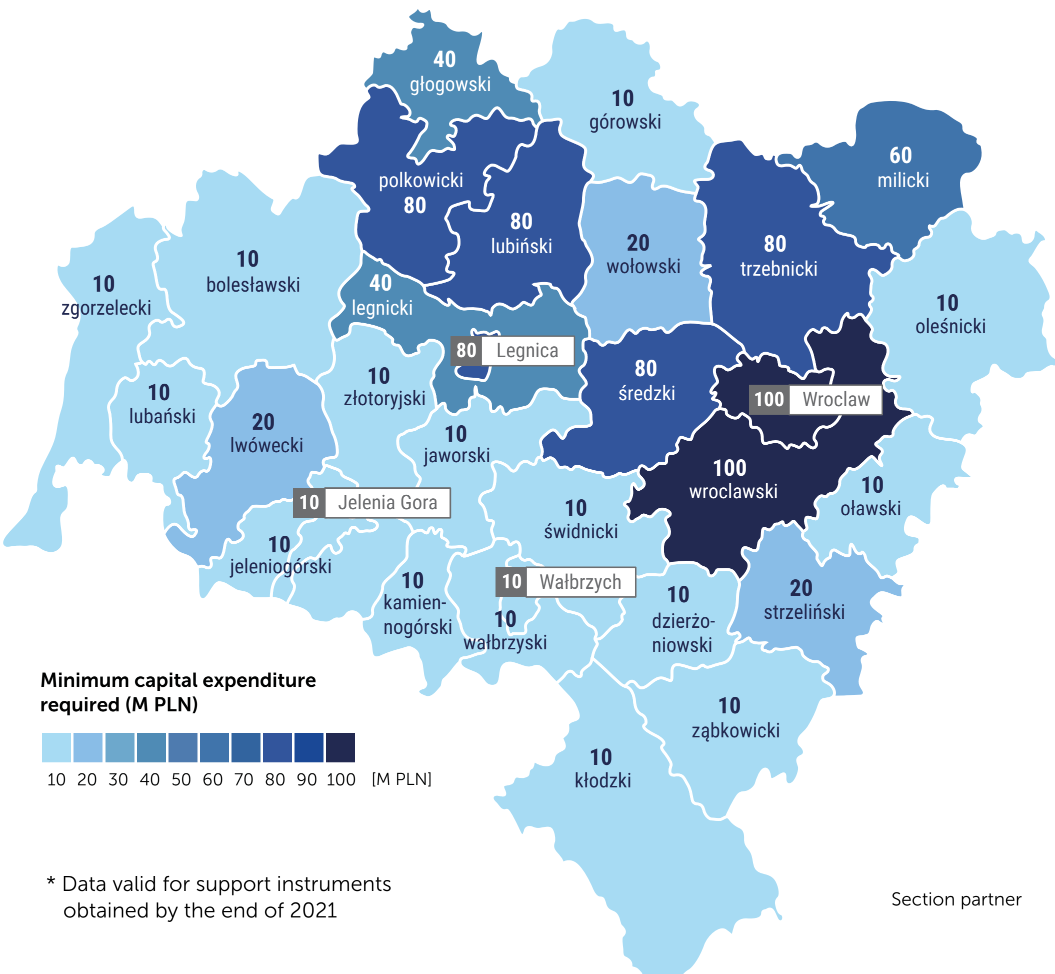
Each group has five criteria, and each of the latter has 1 point. The maximum amount of points is 10. The required minimum depends on investment location within Poland, but it is necessary to score at least 1 point in both groups.

Quantitative criteria

Unemployment rate in the poviat of investment / national average **<60%**

Minimum qualifying costs in million PLN			
Large enterprises	Medium enterprises (80% bonus)	Small enterprises R&D/ BSS investments (95% bonus)	Micro enterprises (98% bonus)
100	**20**	**5**	**2**

Max aid intensity for the Lower Silesia Voivodship is:



- **25%** for large enterprises
- **35%** for medium-sized enterprises
- **45%** for small enterprises

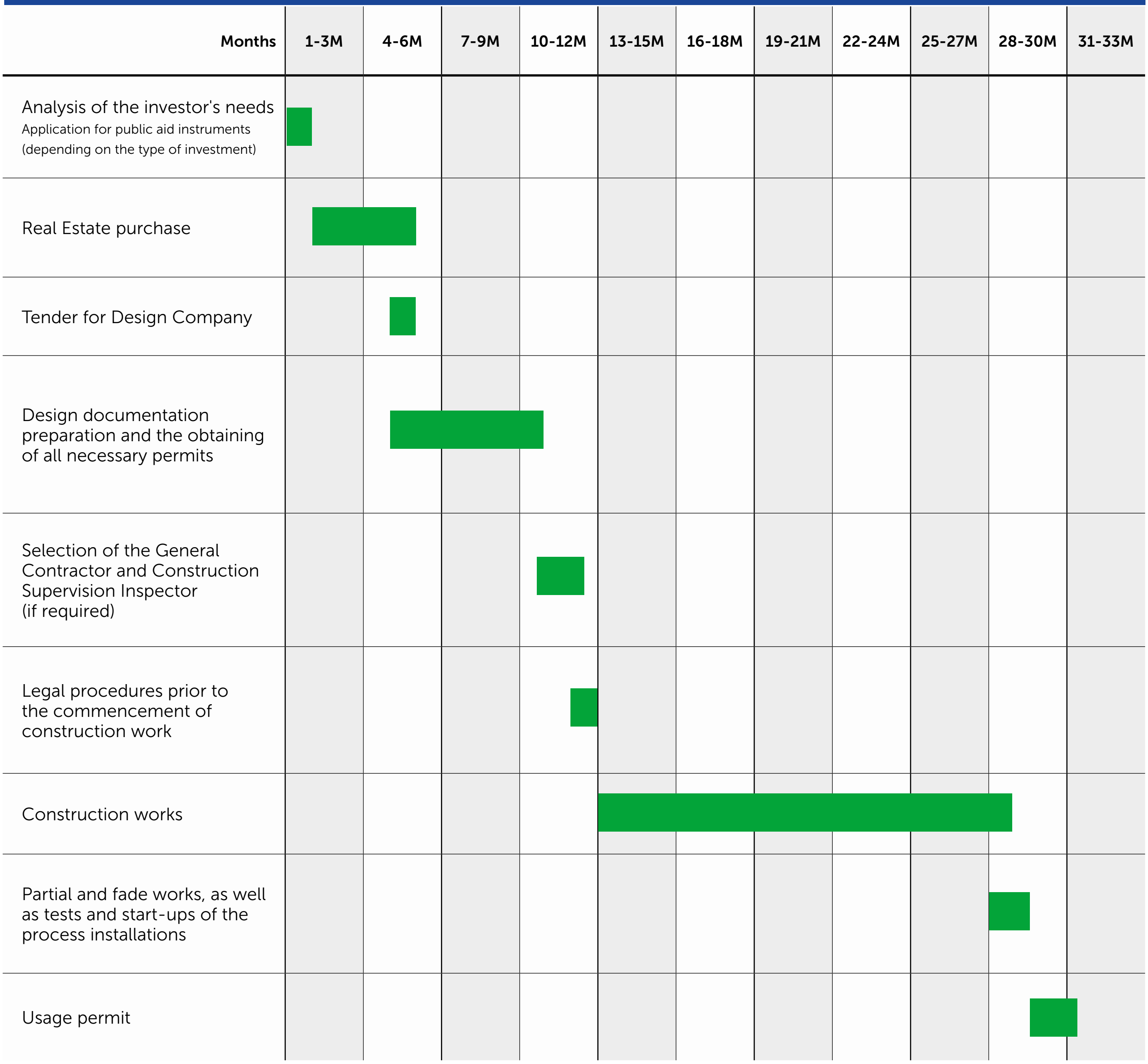
* Data valid for support instruments obtained by the end of 2021

Investment process in overview

The entire investment related to the construction process can be divided into four main stages:

- Pre-design documentation development
- Development of investment projects and permits
- Construction process
- The process of obtaining the occupancy permit

Detailed stages of the investment process with their approximate duration

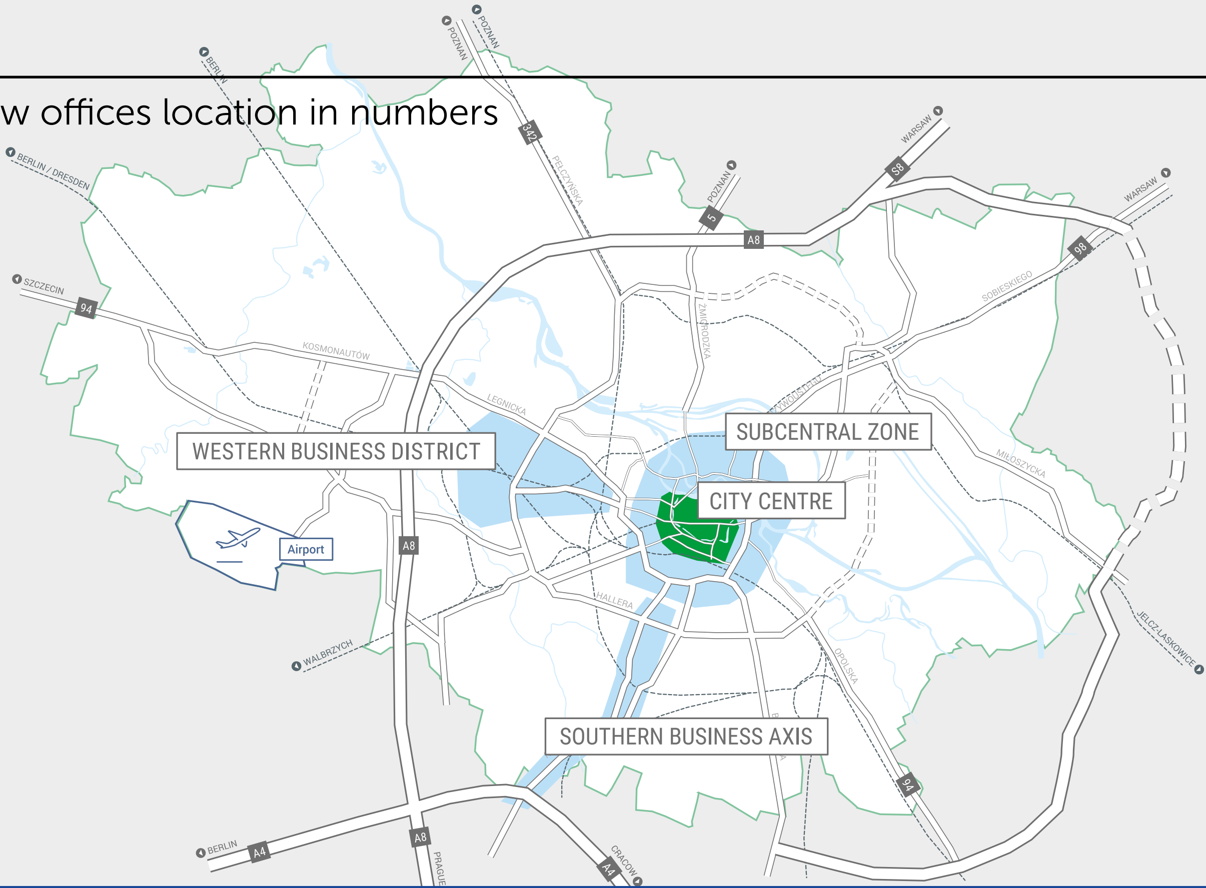


Office market

Wroclaw, with a total existing modern office space amounting to 1.24 million sqm, is the second largest regional office market in Poland in terms of the total stock. The market is constantly growing thanks to numerous global companies and strong Polish players.

Photo: Samsung Wroclaw | Photo by Janusz Krzeszowski

Wroclaw offices location in numbers



Major business locations in Wroclaw

	City Centre	Subcentral Zone	Western Business District	Southern Business Axis
Total stock (sqm)	210,000	337,000	442,500	131,300
Vacancy rate (%)	13.9	12.4	16.3	14.4
Space under construction (sqm)	52,600	15,400	15,400	53,000

Selected buildings under construction

Building name	Location	Completion date	Office space (sqm)
Mid Point 71 Powstańców Śląskich Street	Southern Business Axis	Q4 2021	36,900
Infinity Nabycińska Street	City Centre	Q1 2023	22,000
Quorum Office Park D Sikorskiego Street	Subcentral Zone	Q2 2022	15,400
Brama Oławska Oławska Street	City Centre	Q2 2022	14,000
Wielka 27 Wielka Street	Southern Business Axis	Q2 2022	9,200

Investment market

Despite the prevailing COVID-19 pandemic and its enormous impact on the global economy, the year 2020 has been closed with a good result exceeding 5.3 billion euro. The real estate market is doing relatively well and the investors' appetite and foreign funds remains high. Transaction volume achieved at the beginning of 2021 reflects the good situation on the commercial market and sector's resilience to further restrictions and economic turbulences resulting from the coronavirus pandemic.

Within the first three months of 2021 the investment volume reached EUR 1.3bn and the highest results were noted in office and industrial sectors where investors' strategies remained stable, based on a profit and low risk.

This is in no small way due to the development of the e-commerce market, which has grown even stronger in COVID-19 pandemic times, coupled with changing investor sentiments, with retail having fallen out of favour with many investors.

The current global economic situation caused by the pandemic has a significant impact on the level of yields achieved on the market. Currently, yields for office assets located in major regional markets such as Wroclaw, Krakow or Tricity fluctuate between 5.75%- 6.75%. Between 2019-Q1 2021, investors allocated over EUR 775 M in Wroclaw, which gave the city 1st place among regional cities (the 2nd biggest regional hub is Krakow with volume exceeding EUR 710 M in the same period).

Office market - key figures

1.24 M sqm

Office stock

138,700 sqm

Average annual take-up within 2018-2020

24,200 sqm

Net absorption in 2020

112,000 sqm

Supply under construction planned to delivery in 2021-2022

14.3 %

Vacancy rate

Trends in the office market

Modern workspace

As the pandemic continues tenants introduce new solutions to improve safety in the workplace as well as put on emphasis on employee's well-being and meeting their needs.

Knight Frank conducted a survey among over 370 tenants worldwide which confirmed that office will remain a significant part of strategy for the majority of companies. However, the survey shows the evolution of the approach to office space. According to the research, modern office space will be focused on safety, sustainability and smart technologies.

Simultaneously, the changes in the workspace will result in changes in work models. The most popular among surveyed tenants remain hybrid model. However, some companies choose to go a step further and they enable their employees to work from any place. The third emerging model – hub and spoke – assumes one central office and satellite locations for employees.

Flexible terms

Due to changing needs of the employees, tenants need to find optimal solutions for their workspace strategy. Facing new challenges tenants may consider using coworking office which offers flexible lease terms and allows to adjust needs on the spot. However, in larger organisations it may not bring expected results, some landlords prepared new office concepts opposite to strict lease conditions used before pandemic.

To face new reality some investors introduced the possibility of short-term lease of space, where the subject of the lease is a ready-to-enter space with flexible management of lease terms.

Existing stock

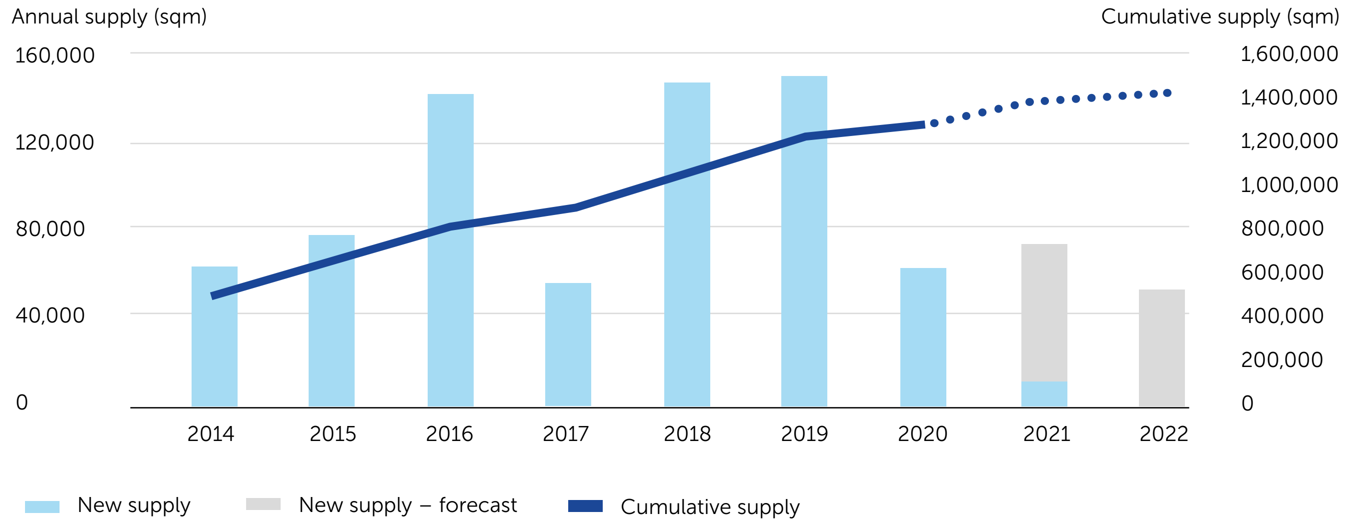
At the end of June 2021, the total office stock in Wroclaw reached 1.24M sqm, placing it the second largest office hub among regional markets. Approximately 17% of existing stock is located in historical part of town, while another 27% in Subcentral Zone. Further business zones are the Western Business District (approximately 36% of total stock) and the area along the Southern Business Axis (approximately 11% of the existing supply), while the remaining 9% of office space is located outside the above-mentioned concentration areas. In 2018 and 2019 the office market in Wroclaw saw aphase of dynamic growth. After exceptionally high developeractivity in previous years it slightly weakened in the capital of Lower Silesia in 2020 and the trend continued in the first half of 2021.

Supply

In H1 2021, only one new project was completed. However, the volume of supply under construction remains on a stable level - at the end of June 2021 almost 140,000 sqm was at the stage of development. If developers follow their schedules, approximately 40% of this space will be delivered by the end of 2021.

The largest share of new supply in 2021 is to be delivered in Southern Business Axis.

Annual Office Supply in Wroclaw (in sqm)



Asking terms and conditions

Other occupancy costs

- Underground parking lots: EUR **65 – 100** per lot per month
- Utilities used in the Subject of the Lease – according to submeters
- Internet services – individual agreement
- Cleaning services – individual agreement

Service charge

- Service charge in A class buildings: EUR **3.0-4.5** per sqm/month

Rental levels and rental period

- Average asking rents in A class buildings: EUR **13.00 – 16.00** per sqm/month
- Average asking rents in B class buildings: EUR **10.00 – 13.00** per sqm/month
- Standard rental period: **36 – 60 months**

Tenant incentives

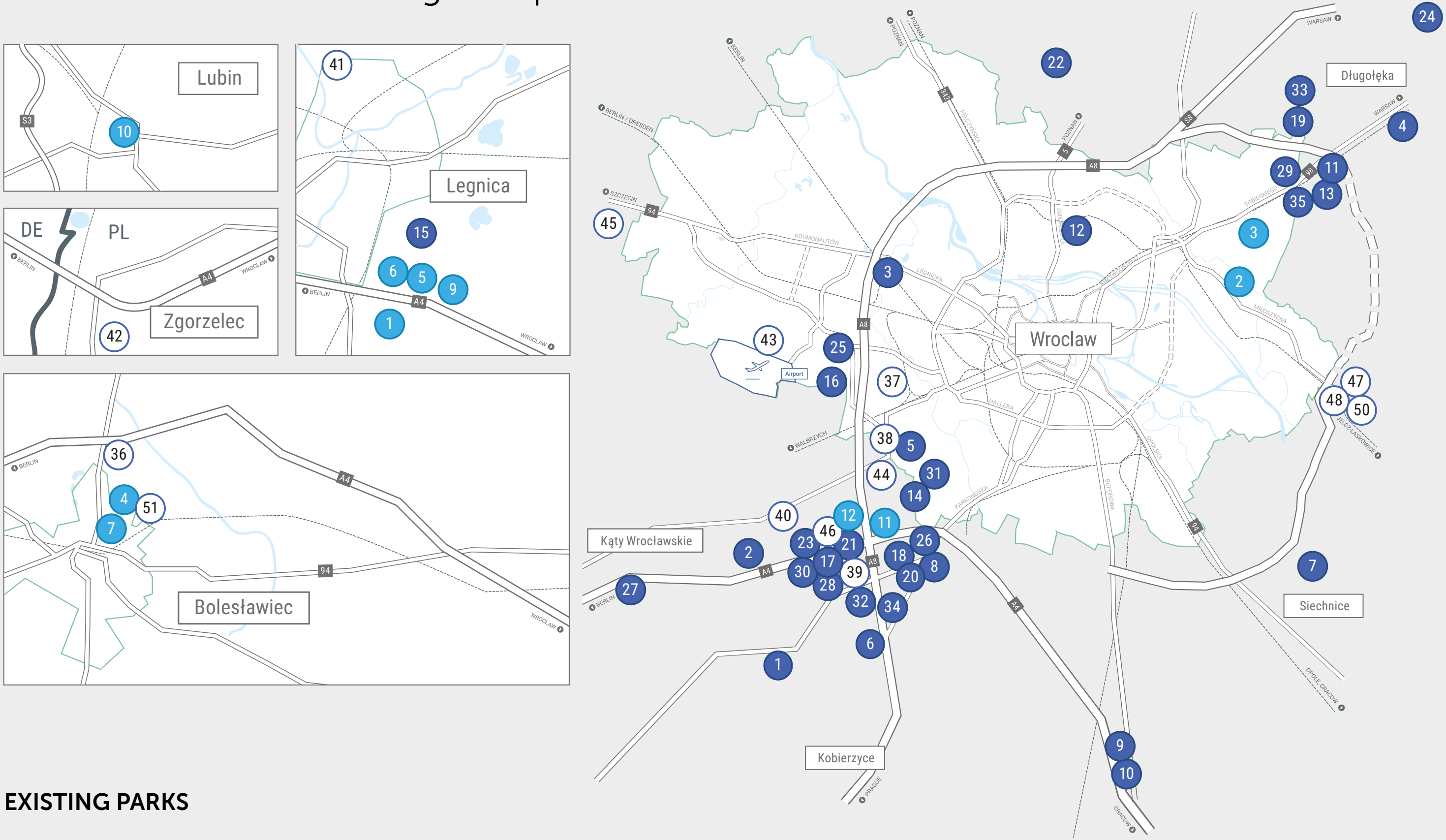
- Budget for the fit out works
- Rent free periods
- Budget for relocation
- Cash contribution

Section partner Knight Frank

Warehouse market

Wroclaw region is currently the fourth most developed market in Poland after Warsaw Region, Silesia and Central Poland considering modern warehouse stock. So far, almost 2.59 million sqm of modern warehouse and industrial space have been delivered in the region.

Selected industrial and logistics parks in Wroclaw



EXISTING PARKS

1. 7R Park Wroclaw
2. BIK Park Wroclaw
3. Citylink Wrocław Stadion SBU
4. Eurologis Centrum Logistyczne
5. GLP Wrocław IV Logistics Centre
6. GLP Wrocław V Logistics Centre
7. Hillwood Wroclaw Siechnice
8. Hillwood Wroclaw Bielany
9. Hillwood Wroclaw Wschód I
10. Hillwood Wroclaw Wschód II
11. Logicor Wroclaw II
12. Logicor Wroclaw IV
13. MLP Wrocław
14. Panattoni City Logistics Wroclaw I
15. Panattoni Park Legnica
16. Panattoni Park Wroclaw Airport
17. Panattoni Park Wroclaw II
18. Panattoni Park Wroclaw III
19. Panattoni Park Wroclaw V
20. Panattoni Park Wroclaw VII
21. Panattoni Park Wroclaw IX
22. Panattoni S5 Wroclaw North Gate (X)
23. Panattoni Park Wroclaw XI
24. Hillwood Oleśnica
25. Prologis Park Wroclaw III
26. Prologis Park Wroclaw I
27. Prologis Park Wroclaw IV
28. Prologis Park Wroclaw V
29. Segro Industrial Park Wroclaw
30. Segro Logistics Park Wroclaw
31. Segro Business Park Wroclaw
32. TriStar Wroclaw
33. VATT Invest Wroclaw
34. Wroclaw- Bielany Logistics Centre
35. Wroclaw Business Park

PARKS UNDER CONSTRUCTION & PLANNED PROJECTS

36. 7R Park Bolesławiec
37. 7R City Flex Airport
38. 7R City Flex Wroclaw I
39. Panattoni Park Wroclaw XII
40. Panattoni Park Wroclaw XIII
41. 7R Park Legnica
42. Panattoni Park Zgorzelec
43. Ideal Idea Park Wroclaw
44. MLP Wroclaw West
45. Panattoni Park Wroclaw West Gate
46. Mountpark Wroclaw
47. Panattoni Park Wroclaw East
48. Campus 39 Panattoni Wroclaw
49. Hillwood Sycow
50. Frontier Park Wroclaw
51. Panattoni Park Bolesławiec

EXISTING BTS PROJECTS

1. BTS Manuli Legnica
2. Logicor Wroclaw I (BTS Whirpool)
3. Logicor Wroclaw III
4. Panattoni BTS Bolesławiec
5. Panattoni BTS Faurecia II
6. Panattoni BTS Gates Legnica
7. Panattoni BTS H&M Bolesławiec
8. Panattoni BTS Ideal Automotive Swidnica
9. Panattoni BTS Lear
10. Panattoni BTS Sanden
11. Panattoni BTS Wroclaw
12. Panattoni BTS Żabka

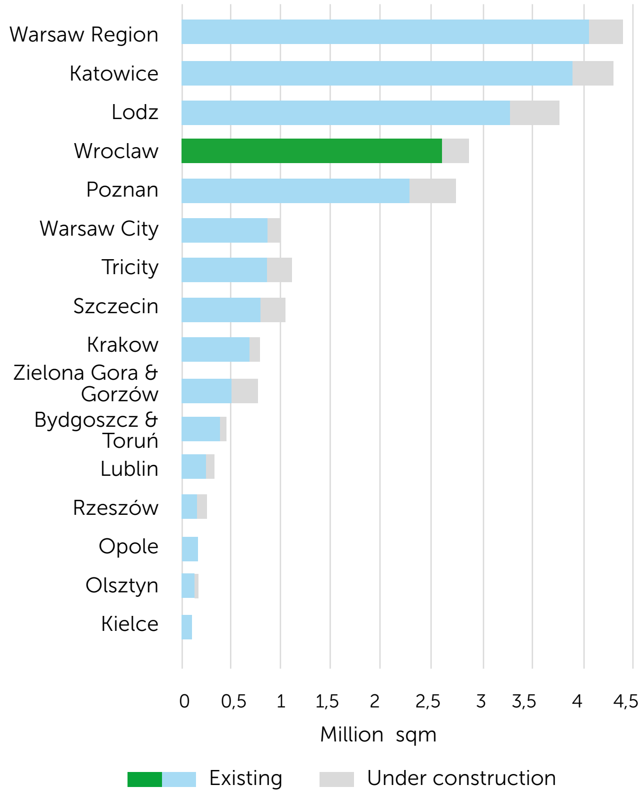
Section partner CBRE

Region overview

Wroclaw region is considered one of the most attractive warehouse and industrial destinations in Central and Eastern Europe. The region benefits from a well-developed road infrastructure including the A4 and A8 motorways and the S5 and S8 express roads.

Due to Wroclaw's location close to the Czech Republic and German borders, the region is often selected to locate distribution centres for logistics operators, retailers and e-commerce businesses, shipping their products to Western Europe. Additionally, incentives and public aid offered by Special Economic Zones as well as favourable investment climate of Wroclaw City are important location drivers for manufacturing companies, resulting in a large share of foreign direct investment in the region. In the past few years Wroclaw has become a manufacturing hub for the dynamically developing e-mobility sector, supplying the industry with electric car battery components and having attracted multiple new investors, particularly from South Korea. Wroclaw hosted 91 FDI projects between 2014-2018, which gave the city a third position in the Polish City of the Future ranking for 2019/2020, after Warsaw and Krakow.

Industrial and logistics supply by region



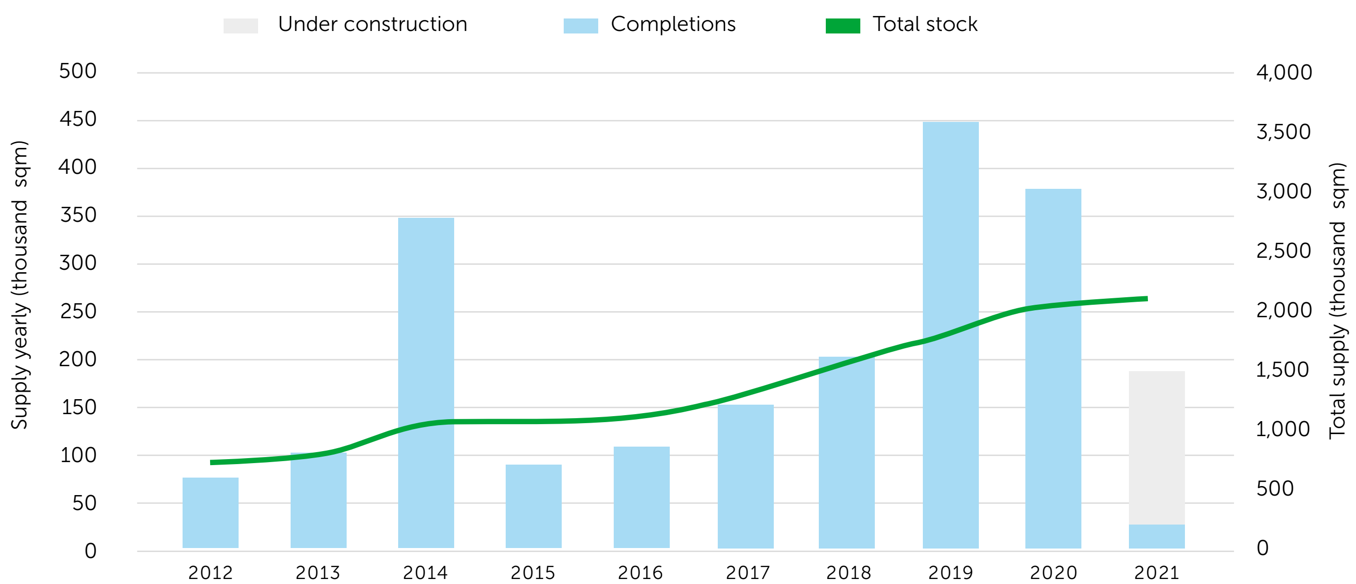
2,585,100 sqm
Total logistics and industrial stock

2.7 - 3.9 €
Headline rents per square meter

212,500 sqm
Space under construction

6.7%
Vacancy rate of total stock

Industrial and logistics supply in the Wroclaw region over the years



Section partner CBRE

Source: CBRE Research, Q1 2021

Developers activity and new projects

Industrial developers delivered 24,700 sqm of new space in the region during the first quarter of 2021. The largest completion in the region in the past year was S5 Wroclaw North Gate II, with 13,800 sqm of modern warehouse space delivered. Additionally, only one another project was completed in 2021– 7R City Flex Wroclaw II with 10,900 sqm.

The Wroclaw industrial and logistics real estate market has grown by 7% in a year (since the end of Q1 2020 up until Q1 2021). Currently 212,500 sqm of modern warehouse space are under construction. 54% of this space (approximately 114,000 sqm) is not secured by pre-lease agreements and will be available within the next few months.

Developers exhibit a more cautious approach these days and don't begin new constructions until a substantial prelease in a project is secured. At the same time the demand for modern warehouse space remains relatively high. Four new developments have been started in Q1 2021: Panattoni Park Zgorzelec offering 45,000 sqm of modern warehouse space, S5 Wroclaw North Gate II (X) with 27,900 sqm, 17,500 sqm in Panattoni Park Wroclaw West Gate and Prologis Park Wroclaw V with 11,900 sqm.

Rents

Despite the growing demand, headline rents remained stable in the last years and are expected to stay at the same or similar levels. Currently, prime headline rents in the region are recorded within the range of 2.70 – 3.90 EUR / sqm/ month.

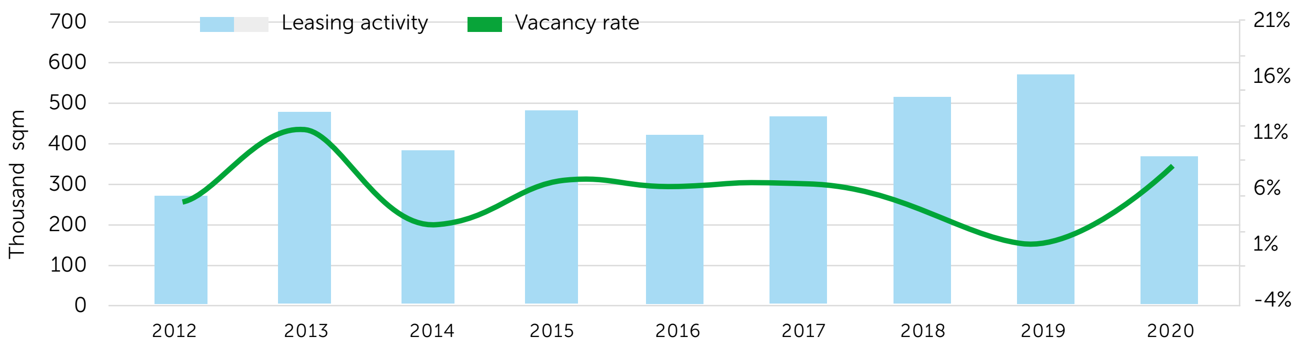
Leasing activity and vacancy rate

Vacancy rate in the Wroclaw region was at an average level of 6.7% at the end of Q1 2021, and in a year-to-year perspective the rate decreased by 0.3 percentage point. The vacancy rate in the Wroclaw region is slightly higher than the average rate in Poland – 6.5% at the end of Q1 2021. The availability of vacant space is higher compared with the two preceding years, as the Wroclaw region experienced a large increase of the supply - 830,000 sqm since the beginning of 2019 – due to the then record-low vacancy rate, which has not been yet entirely absorbed by the market.

Tenants' interest in industrial and logistics space remains high. The demand for industrial and logistics space amounted to 560,400 sqm in 2020, whereas in Q1 2021 it amounted to 184,700 sqm. New lease agreements, including Built-to-Suit projects, together with expansions of existing footprints accounted for 86% of the total leasing activity registered this year in the Wroclaw region, whereas 14% of the leased space were contract renewals in Q1 2021.

The Wroclaw leasing market was dominated by 3PL operators – logistics tenants, who rented 46% of the modern space leased in 2021 YTD in the region. E-commerce business plays an important role and further growth of the sector is predicted as a consequence of the changing consumer shopping preferences. Such situation will result in a growing need for modern logistics space in both the short and long term.

Total leasing activity and vacancy rate in the Wroclaw region



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Source: CBRE Research, Q1 2021

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