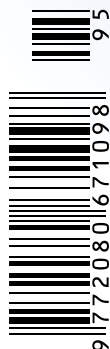


Warsaw Business Journal's guide to

INVESTING in POLAND 2010



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• Kępa Mieszczańska

LOCATION: voivodship: dolnośląskie
county: Wrocław
municipality: Wrocław

LAND AREA: 12.6953 ha, 0.4222 ha, 0.1670 ha

The property is located in the centre of Wrocław, very close to the city market, on an island called Kępa Mieszczańska. Wrocław is the fourth largest city in Poland, with a population of roughly 635 thousand. It is the dynamically developing regional capital of the dolnośląskie voivodship.



• Modlin Cytadela – near Warsaw

Attention: A discount in the amount of 50% of the final tender price!

LOCATION: voivodship: mazowieckie
county: nowodworski
municipality: Nowy Dwór Mazowiecki
LAND AREA: 55.0233 ha, usable floor area: 58.820 m²

Twierdza Modlin is one of the largest and best preserved fortresses in Poland. Property is situated about 40 km north-west of Warsaw not far from the confluence of the rivers Bug, Narew and Vistula (Wisła). Neighboring on the properties is the national highway No.7 – Warsaw – Gdańsk. Five km away is the former military airfield in Modlin, which is being planned for redevelopment into a state-of-the-art civil aviation airport to cater for low-cost airline companies and cargo flights.



• Holiday Centre Wysoki Kamień, Szklarska Poręba

LOCATION: voivodship: dolnośląskie
county: jeleniogórski
municipality: Szklarska Poręba
LAND AREA: 5.1718 ha

The property comprises of a former military holiday house located at the altitude of 770 meters a.s.l., on the slope of the Wysoki Kamień Mountain, in Oficerska Street. Szklarska Poręba is a tourist and holiday resort located in the western part of Sudety.



• Hel, ul. Przybyszewskiego

LOCATION: voivodship pomorskie
county: pucki
municipality: Hel
LAND AREA: 5.8232 ha, usable floor area: 4169 m²

The property is located on the tip of the Hel Peninsula and its climatic, natural and landscape values attract thousands of holidaymakers every year. The property may be used for very broadly conceived tourist and recreational activities.



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INVESTING in POLAND 2010

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E Blake Berry,
Editor-in-Chief

Dear reader,

Welcome to the inaugural issue of *Investing in Poland*, a *Warsaw Business Journal* guide for foreign investors. This publication arrives, not incidentally, at a pivotal moment in modern Polish history, a moment in which decisive action could mean the difference between great profit and tremendous loss. Indeed, a growing number of signs indicate that now is the right moment to invest in this country:

Poland's fundamentals are strong. Throughout the economic turmoil of 2008-2009, its economy has been one of the strongest

– if not the healthiest overall – in the European Union. It has avoided most of the traps which have mired other regional economies. It did not participate in the sub-prime mortgage market, there have been no major bank failures and no political implosion. Economic growth has slowed, but recession has been avoided thus far.

Poland is on the right path to catch up with Western Europe. This will admittedly take time, but that's all the better for the far-sighted investor. Statistics show that Poland lags well behind the European average in areas like housing and retail space saturation, broadband penetration and, most spectacularly, transport infrastructure.

The sheer volume of work that remains to be done guarantees that profitable investment opportunities will abound for years to come. Moreover, many projects will be eligible for Polish investment incentives and EU aid.

Poland is maturing politically. In 1991, following its first free elections since WWII, 29 political groupings entered Parliament; today there are just four, and polls indicate that support for these groups has largely stabilized. The adoption of European Union standards

has helped to reform the political and bureaucratic classes to some extent, and a generous portion of EU Structural and Cohesion Funds has assisted in smoothing this transition.

Problems remain, of course. For one, the Civic Platform-Polish People's Party government has not followed through on many of its pro-business election promises. It still takes too long to start up a new business – the much vaunted “one-stop shop” start-up process still requires two stops too many. Yet for all these and other problems, Poland remains an investor-friendly country in which businesses are guaranteed protection under European law.

Poland is at a crossroads, both literally and figuratively. Situated on the EU's eastern frontier, the country effectively serves as a springboard to Russia, Ukraine, Belarus and other regional markets. At the same time, its large population and stable economy make Poland a prime gateway for non-member states eager to penetrate the EU market. It is both an economic staging ground and a profitable place to do business in its own right.

The country is also at a turning point in another sense. The year 2009 has marked the close of 20 years of economic, political and social transformation; 2010, meanwhile, signifies the opening of Poland's third decade as a modern, independent nation. Terms such as “emerging market” and “post-communist” are taking on an increasingly historical character.

Bring all of the aforementioned points together and a portrait emerges of a market in which investment risk is steadily falling and yet growth potential remains high. The purpose of *Investing in Poland 2010* is to serve as a compass for investors interested in this market, offering insight into regional and municipal economies, and to provide the uninitiated with basic knowledge about the spectrum of opportunities in the country.



DESTINATION POLAND – FOCUSED EXPANSION IN CENTRAL EUROPE

By Martin Oxley,
Chief Executive Officer, British Polish Chamber of Commerce (BPCC)

At a time when the global economy is in turmoil, Poland continues to be a solid and sustainable destination for business growth. With its large and stable domestic market, the country offers an excel-

lent platform for export sales.

Poland's strategic location also makes it a natural choice for EU investment in research, manufacturing and logistics. Road, rail and air infrastructure are developing apace, with UEFA's EURO 2012 targets providing a catalyst.

Looking at external economic indicators, Poland is one of the only EU markets with positive growth. The current currency exchange and significant investment incentives provide an attractive framework for international companies seeking expansion in Europe. Over the next five years, €93 billion of public sector based financing will be available to maintain the momentum in enterprise, in-

frastructure and human capital development. Poland is poised to become a powerful economic engine in Europe.

The BPCC can see that many of its members who have been doing profitable business in Poland for years are currently upping their investments in this market. Companies like Tesco, GlaxoSmith-Kline, Cadbury, Shell and Aviva are increasing production or employment in Poland.

Paradoxically, however, we can see little new interest in Poland among companies that have not yet investigated this market. With the global crisis, companies are too often following the motto that “now is not the time for something new.” Yet it is exactly now that companies should be looking at Poland. It has the right level of low business risk and high business opportunity.

Whether you need to cut costs, source more cheaply, find a new export market or outsource services, Poland is the right place to be doing business right now.



GERMANY: A LONG-TERM PARTNER FOR POLAND

**By Lars Bosse,
General Director,
German Polish Chamber of Industry and Commerce**

Germany is still a priority country for the Polish economy, not only when it comes to foreign trade – it is the destination for over 25 percent of Polish export – but also as its most important foreign investor.

In Poland there are about 6,000 companies with some German capital, representing over 17 percent of total foreign capital in the country.

Over 700 German firms have each invested more than \$1 million in Poland, and the level of accumulated German investments in Poland surpassed €20 billion in 2008. The vast majority of this investment falls in the automotive, mechanical engineering, chemical & pharmaceutical, banking & insurance, energy and wholesale & retail trade sectors, but business process outsourcing is also gaining significance. The trend in the BPO sector demonstrates that foreign investors, including those from Germany, value the quality of Polish work.

Surveys carried out by the German Polish Chamber of Industry and Commerce among German investors show that 82 percent of them are satisfied with their choice of Poland as an investment

location, and Poland is moving up in the ranking of investment locations in the Central and Eastern Europe region, overtaking the Czech Republic and Hungary. In general, the CEE region accounts for about nine percent of German foreign direct investment worldwide, and the significance of this part of Europe from the German perspective is continuously growing.

As some of the most important advantages of investing in Poland, German entrepreneurs cite: EU membership; employees' increasing competence and commitment, which translates into increased productivity at work; and the availability of local sub-suppliers.

Among the things they rate poorly are public infrastructure, the tax system and its administration, as well as the low predictability of economic policy and legislation.

In addition to the traditional arguments in favor of investing in Poland, new ones are emerging: looking at Poland's positive GDP dynamics through the prism of the whole of Europe in times of global crisis, foreign investors view the crisis in Poland as mild, and the economy as stable.



THE INVESTMENT CLIMATE IN POLAND FROM A NORDIC PERSPECTIVE

**by Peter Tærø Nielsen,
Chairman,
Scandinavian Polish Chamber of Commerce**

Having traveled in Denmark, Sweden and the UK during the summer of 2009, it was my clear impression that the crisis was retreating, slowly but steadily.

In Poland, the crisis mainly consisted of a hangover after a real estate and mortgage loan boom as well as the effects of international commercial and financial relations. Therefore Poland has not and probably will not be hit by recession.

At the same time, the so-called analysts in Western financial centers finally realized that expressions like "emerging markets" or "Eastern Europe" are not specific and precise enough. These terms cover a lot of different countries and luckily Poland is at the absolute top in terms of key economic figures, even when compared to Western economies.

Poland is poised to be a winner after the crisis.

For Nordic investors, Poland is a very attractive country. It has a well-trained and well-educated workforce which is eager to work hard for further prosperity.

Close proximity to northern markets and well-arranged transportation and communication channels have created business opportunities in Poland. The number of interested Nordic companies is growing and those firms already present are generally very satisfied.

Poland offers many other advantages. Opportunities for EU funding have never been better. In addition, the modest tax burden for both companies and individuals is attractive, as are the favorable conditions offered in special economic zones.

There are also obstacles, which are confusing and strange from Nordic investors' point of view. The main barrier is "paperwork" and bureaucracy. For Nordic investors it is difficult to see a reason for a lot of the "indispensable" paperwork in Poland. Such inefficiency nowadays costs money – a lot of it. This is something the Polish government should improve dramatically if it wants Poland to remain as fantastically competitive tomorrow as it is today.

In this publication you will find information on the state of the Polish economy as evinced by the most important economic indicators, as well as essential data concerning our country's regions. This compendium will also present you with opportunities for development and incentives offered by investment areas such as special economic zones and industrial and technology parks. We hope that the investment guide which you are holding in your hands will prove both useful and profitable, and that the tips within it will provide you with solid knowledge of this country. We hope above all that it will help you to answer the question: "Is it worth investing in Poland?"

Poland is one of the fastest developing countries in Europe in terms of its economy. Solid macroeconomic fundamentals, the prospects of further economic growth and the safety guaranteed by membership in the EU, WTO, OECD and NATO – these things make our country the subject of growing interest among investors all over the world. Moreover, according to Eurostat data, Poland is one of the few European countries likely to note economic growth in 2009.

Investing in Poland gives entrepreneurs direct access to 38 million consumers within the Polish market and 500 million potential customers in the internal EU market. It is also worth noting that Poles constitute a fourth of Central Eastern Europe's population, and that our country's GDP constitutes a third of regional GDP.

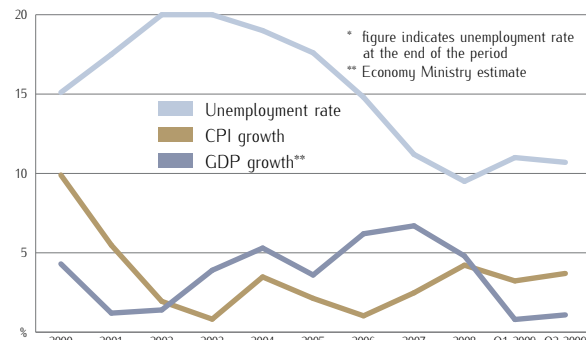
Factors especially favorable for investment in Poland include above all: the size of Polish market, its low labor costs, accessibility of educated staff, stable political situation and favorable geographical location. The country also offers numerous instruments supporting investors, such as:

- investment incentives in special economic zones and municipalities (e.g. income tax exemptions or purchase of land for competitive prices)
- a favorable quality-cost ratio
- the possibility to make use of EU funds
- a wide choice of brownfield and greenfield locations at competitive prices
- the possibility to locate an investment within industrial or technology parks, equipped with modern entrepreneurship infrastructure
- the low cost of conducting business (corporate income tax rate of 19%)

Our economy's high marks in various international rankings attest to the friendly investment climate in Poland. In Ernst & Young's "2009 European Attractiveness Survey," Poland held an excellent second place in Europe in terms of the number of new workplaces created thanks to FDI projects realized in 2008. According to E&Y experts, Poland also saw 21% more FDI projects than in the previous year.

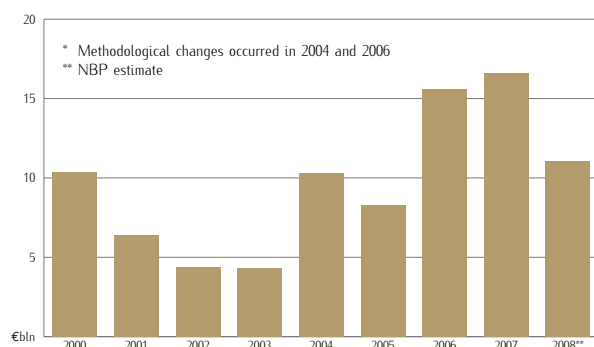
Among investors planning to build service centers, interest in Poland has been growing for several years. International concerns are increasingly often putting Poland on the list of countries to which it is worth relocating non-production divisions, such as accounting or call centers. Google, Faurecia or First Data Corporation are just a few examples of firms that have already sited service centers here. Moreover, with increasing frequency foreign investors are emphasizing that it is not only the cost of labor that counts, but also the quality. The growing percentage of BPO projects in the total volume of foreign investment is evidence of this. Poland is becoming a European services center, which has great significance for the evolution of its labor market.

Yearly unemployment*, inflation and GDP growth, 2000 – Q2 2009



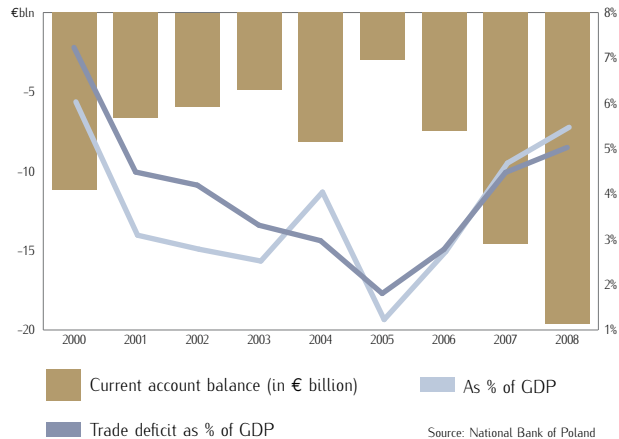
Sources: PAIIZ, Central Statistical Office, National Bank of Poland

Foreign direct investment (in € billions)*



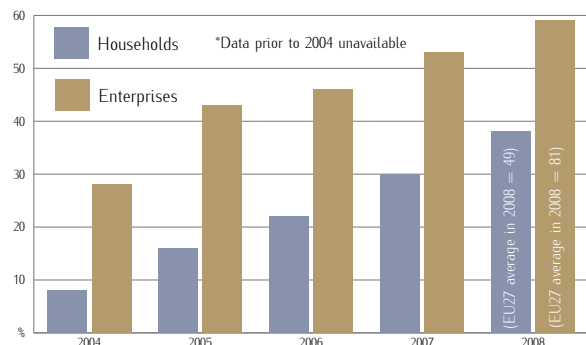
Source: National Bank of Poland

Current account balance



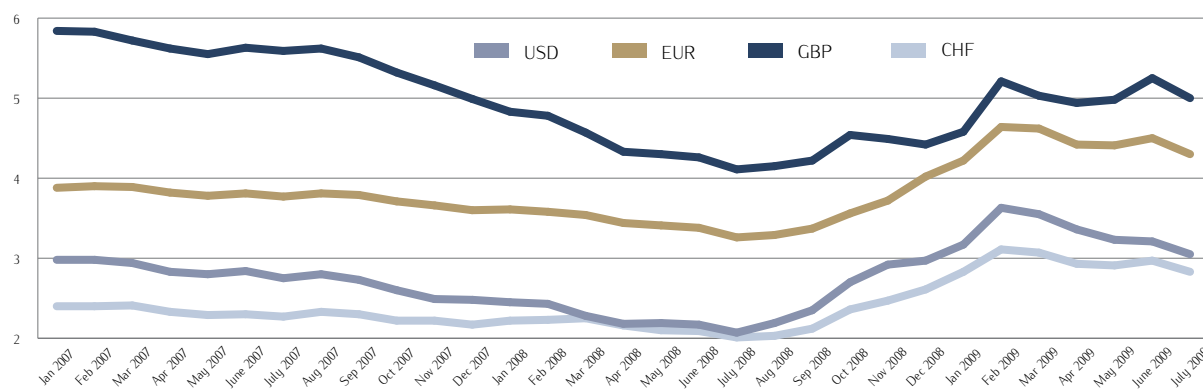
Source: National Bank of Poland

Percentage of households and enterprises with broadband access*



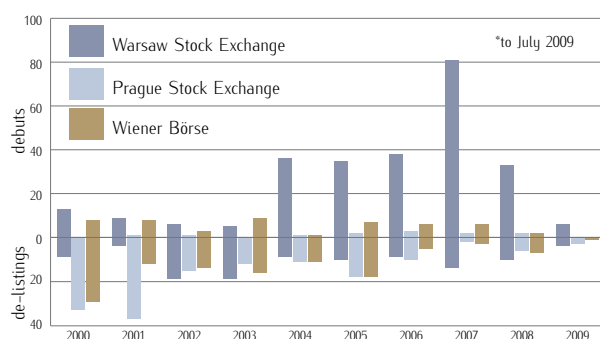
Source: Eurostat

Currency exchange rates, January 2007 – July 2009 (monthly average)



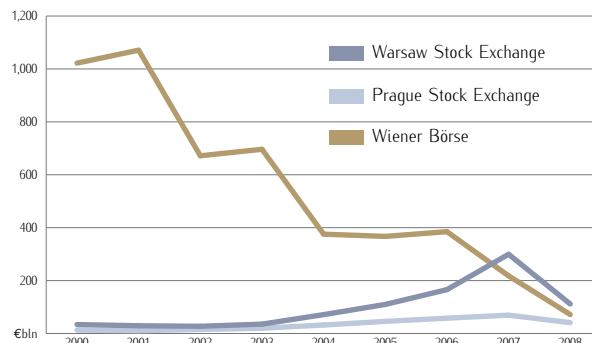
Source: National Bank of Poland

Regional stock markets: debuts and de-listings, 2000-2009*



Source: Warsaw Stock Exchange, Prague Stock Exchange, Wiener Börse

Regional stock market capitalization (in € billion)



Source: Warsaw Stock Exchange, Prague Stock Exchange, Wiener Börse

One of the key investment incentives in Poland is the possibility of investing in one of the 14 special economic zones, which together constitute an area of over 12,531 ha in regions across country. Any SEZ is subject to preferential tax treatment. An entrepreneur can get the following privileges in an SEZ: tax exemptions (corporate or personal income tax); land fully prepared for investment, at competitive prices; free-of-charge assistance in dealing with formalities connected with the investment; and property tax exemptions (within some municipalities).

Great opportunities and challenges lie ahead for Poland thanks to its receipt of nearly 20% of the EU's budget designated for the realization of cohesion policy after the 2007-2013 financial perspective. The €67 billion at Poland's disposal represents the greatest level of support the EU has ever given to a member state. Poland will be able to spend these resources until 2015 and entrepreneurs can receive support from four national operational programmes as well as 16 regional operational programmes.

Over the next few years PAiIZ will strive above all to support those projects which create good workplaces, are distinguished by technological advancement and concern fields in which Poland

has gained or has a chance to gain a lasting competitive advantage in the international market. In terms of sectors of the economy, this means that special attention will be paid to the IT, BPO, R&D, automotive, mechanical and aerospace branches. Additionally, because of the need to diversify energy supply, the renewable energies sector has also become a priority.

Currently PAiIZ's key geographical alignment is largely towards the countries of the EU and, in the longer term, India and China. The economic crisis has of course influenced foreign entrepreneurs' plans to locate investments in Poland, and yet they have not completely given up on being present in our country. They appreciate the fact that Poland is not experiencing the crisis to the same extent as other EU countries and is still developing at a relatively quick pace. Our task is to convince them that investing at this moment will be rewarding, because a period of economic slowing is more conducive to the realization of investments with markedly lower expenditures than a period of prosperity.

Text provided by:
the Polish Information and Foreign Investment Agency

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KUJAWSKO-POMORSKIE



KEY FACTS

Voivode: Rafał Bruski

Marshall: Piotr Calbecki

Area: 17,972 sq km

Population (Dec 2008): 2,067,918

Labor force (Dec 2008): 1,336,920

Unemployment rate (June 2009): 14.4%

Average monthly wage (2008): zł.2,761.03

GDP (2006): zł.50.2 billion (4.7% of national GDP)

Natural resources: Jurassic limestone, lignite, rock salt

Number of students in higher education (2007): 83,000

Number of institutions of higher education: 21

Major universities: Kazimierz Wielki University, Nicolaus Copernicus University

Major airport: Bydgoszcz I.J. Paderewski Airport

Special Economic Zone:

Pomeranian Special Economic Zone: 564 ha



ESTIMATED INVESTMENT

Total (2007): zł.8.11 billion

(private sector: zł.5.28 billion; public sector: zł.2.81 billion)

Of which:

Industry: zł.3.05 billion, of which:

manufacturing: zł.2.39 billion

electricity, gas and water supply: zł.640.3 million

Real estate, renting and business activities: zł.1.24 billion

Trade and repair: zł.938.1 million

Construction: zł.911.1 million

Transport, storage and communication: zł.395.1 million

Recent major investors: Alcatel-Lucent, Azko Nobel, Bonduelle, British Sugar, Lafarge, Mondi Group, Nestle, Nordzucker, Provimi, Rieber & Son, Sharp Corporation, ThyssenKrupp, Unilever

Sources of major foreign investment: the UK, France, Germany, Japan

VOIVODSHIP BUDGET

2008:

Revenues: zł.655.93 million

Expenditures: zł.740.93 million

Deficit: zł.85 million

2009 (projected):

Revenues: zł.731.17 million

Expenditures: zł.795.17 million

Deficit: zł.64 million

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KUJAWSKO-POMORSKIE VOIVODSHIP

Occupying a prime location in Poland's central northeast, Kujawsko-Pomorskie voivodship is strategically situated in terms of the domestic market and within easy reach of foreign markets. It is not a region of great extremes – for instance, according to the local authorities, it's "average" in terms of area and population.



Indeed, average is in many ways a good term to describe Kujawsko-Pomorskie. It is neither the richest nor the poorest voivodship, the most entrepreneurial nor the least. Its contribution to national GDP is more or less in the middle of the pack.

The region is far from average in other areas though, not least of which are its potential and the ambition of its local officials. Their express desire is to make

Kujawsko-Pomorskie one of the "most competitive and innovative regions in the European Union." To that end, a number of institutions have been established to facilitate investment, including an Investor Assistance Centre and several industrial and technology parks.

Food-processing (Kopernik, Jutrzenka), chemicals (Anwil, Zachem), manufacturing (Aparator, Hydrotor), wood-timber and paper (Mondi Świecie) are among the best-developed industries in the

voivodship. Agriculture is also a traditionally strong sector. Telecoms and advanced manufacturing are becoming more prominent, with investments from firms such as Alcatel-Lucent and Sharp Corporation. The latter's Sharp Crystal Park, located in Łysomice near Toruń, is an LCD display manufacturing center investment valued at around zł.1 billion.

To accommodate these and other projects, the voivodship is working to develop new infrastructure. For example, the Bydgoszcz Airport – which serviced over 280,000 passengers in 2008 – has received EU funding and plans to modernize elements such as its runway and taxiways. A new cargo terminal will also be developed.

Regional highways are also expecting an overhaul. Projects in the pipeline include the development of the A1 motorway linking Scandinavia with the south of Poland and Europe, via Gdańsk and Toruń; the S10 expressway, which will connect Szczecin and Warsaw, via Bydgoszcz and Toruń; and the S15 from Poznań to Warmia and Mazury via Toruń.

Among their other assets, local authorities list low labor costs, a large workforce (various fields of medicine are noted) and the quality of local institutions of higher education. Unemployment remains relatively high, meaning employers have the advantage in the market, and a number of well-respected universities add to the labor pool each year.



MAJOR CITIES

Bydgoszcz

Bydgoszcz, home of the Kujawsko-Pomorskie Voivode's Office, is the region's largest city in terms of both area and population. It is a town with a long history – the first recorded mention of Bydgoszcz is from 1238 and it was given a municipal charter a little over 100 years later.

The city is obviously proud of its 600-plus years of history and actively courts tourists with its historical monuments and architecture. It also has an opera house, concert hall and several theaters, assets which it touts as advantages in its cultural rivalry with sister-capital Toruń.

According to the local authorities, the residents of Bydgoszcz also possess a strong entrepreneurial spirit – upwards of 123 economic entities per 1,000 residents are registered in the city. In total there are over 43,000 private businesses, more than 500 of which have foreign capital.

The city's business environment is well developed, with strong banking and financial services sectors as well as several chambers of industry and commerce. It is also home to the headquarters of the Bydgoszcz Industrial Cluster, a collection of almost 30 firms from different sectors of industry as well as various other institutions.

The city hosts a number of educational institutions which supply the local labor market with graduates in a number of fields, including engineers, doctors, teachers, economists.

Infrastructure in and around the city is the subject of several ongoing and nascent projects. These include the construction of a water park, redevelopment of a local sports complex and a stadium, and reconstruction of a bridge. The city's tramlines are also being expanded and cycling paths are being built.

Mayor: Konstanty Dombrowicz

Area code: 0 52

Area: 175 sq km

Population (Dec 2008): 361,222

Labor force (Dec 2008): 235,572

Unemployment rate (June 2009): 6.3%

Percentage of city covered by zoning plans: 19.21%

OTHER MAJOR CITIES

CITY	POPULATION	AREA
Włocławek	118,432	84 sq km
Grudziądz	99,090	58 sq km
Inowrocław	76,489	30 sq km
Brodnica	27,534	23 sq km
Świecie	25,567	12 sq km

Recent major investors: Carrefour Polska, Hotel Słoneczny Młyn, Hunger Development, Opus 2 Investment, Parkridge CE Retail

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Toruń

Gothic architecture, Teutonic Knights, Nicolaus Copernicus and gingerbread – while it seems an odd mix, these are all symbols of Toruń, Warmińsko Mazurskie's second capital and seat of its marshal.



Even more so than Bydgoszcz, Toruń is a town known for tourism and culture. Its medieval old town is extremely well preserved and occupies a place on UNESCO's World Heritage List. A pair of local castles, the house where Copernicus was born, several

Gothic churches and a planetarium all help to draw tides of visitors each year.

Like their peers in the voivodship's offices, Toruń's officials are highly ambitious in their development plans. In addition to culture and tourism, they list hospitality, trade-services, and advanced, environmentally friendly industries among the kinds of investments they would like to encourage. Moreover, the city's strategic development plan aims to create an internationally recognized academic center and to make Toruń one of the strongest economies in the north of Poland.

One means of achieving these goals is of course to attract investment. To that end, the city offers tax reliefs for new investments or the creation of new jobs, as well as real estate tax exemptions for many public-use sports or recreational investments. Local officials also note the presence of a number of local institutions which support entrepreneurship and investors.

Infrastructure in the city is constantly being upgraded. Over the past few years Toruń has, by its own estimation, invested around zł.700 million in technical infrastructure. In 2009 alone it budgeted for around zł.300 million in infrastructure investments, about a third of which was designated for road modernization. Other major projects in the offing include the construction of a new bridge across the Vistula, creation of modern waste-management infrastructure and work on a fast metropolitan railway connecting Bydgoszcz and Toruń.

Mayor: Michał Zaleski

Area code: 0 56

Area: 116 sq km

Population (Dec 2008): 206,619

Labor force (Dec 2008): 139,306

Unemployment rate (June 2009): 7.2%

Percentage of city covered by zoning plans: 28.7%

Recent major investors: Castorama Polska/Kingfisher Sourcing Eastern Europe, International Theaters Ltd, Makro Cash & Carry, Urbański Construction Company

Key contacts:

Investor Assistance Office

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ŁÓDZKIE

KEY FACTS

Voivode: Jolanta Chelmińska

Marshall: Włodzimirz Fisiak

Area: 13,988 sq km

Population (Dec 2008): 2,555,898

Labor force (Dec 2008): 1,634,443

Unemployment rate (June 2009): 10.6%

Average monthly wage (2008): zł.2,822.09

GDP (2006): zł.65.63 billion
(6.18% of national GDP)

Natural resources: brown coal, ceramic clay, gypsum, limestone, mineral water, rock salt

Number of students in higher education (2008): 141,747

Number of institutions of higher education: 29

Major universities: Technical University of Łódź, University of Łódź

Major airport: Łódź Władysław Reymont Airport

Special Economic Zones:

Łódź Special Economic Zone: 995.5 ha

"Starachowice" Special Economic Zone: 25.97 ha



ESTIMATED INVESTMENT

Total (2007): zł.13.84 billion
(private sector: zł.8.55 billion; public sector: zł.5.29 billion)

Of which:

Industry: zł.5.47 billion, of which:

manufacturing: zł.3.11 billion

Real estate, renting and business activities: zł.2.88 billion

Transportation, storage and communication: zł.1.48 billion

Construction: zł.1.16 billion

Trade and repair: zł.871.3 million

Agriculture: zł.285.1 million

Recent major investors: Ceri, Corning Cable Systems, Panattoni, Sonoco

Sources of major foreign investment: Austria, France, Germany, Ireland, Italy, the UK, the US

VOIVODSHIP BUDGET

2008:

Revenues: zł.501.96 million

Expenditures: zł.573.72 million

Deficit: zł.71.75 million

2009 (projected):

Revenues: zł.761.82 million

Expenditures: zł.939.66 million

Deficit: zł.177.83 million

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ŁÓDZKIE VOIVODSHIP

Conveniently situated between the densely populated Warsaw and Katowice agglomerations, Łódzkie voivodship has consistently attracted large amounts of foreign investment over the years.



The region's IT sector is fast-growing – US-based IT hardware producer Dell decided in early 2009 to relocate its Irish production facility to Łódź, the capital of the voivodship, to give just one recent example.

Łódzkie is home to the Łódź Special Economic Zone, in which large firms such as packaging manufacturer Printpack and cereal producer Kellogg have sited investments. Other

special investment areas include the Industry and Technology Park Bełchatów Kleszczów, the largest industrial and tech park in Poland, and the Kutno Agro-Industrial Park.

A number of infrastructure projects are underway or in the preparatory stages in Łódzkie, and the area is a crossroads of sorts within Poland. For example, once work on the A1 and A2 motor-

ways is completed, Łódź will serve as an interchange for drivers headed to Germany, Belarus, the Czech Republic or the Baltic Sea.

The voivodship is also famously rich in coal. A large lignite mine and power plant in Bełchatów, both part of the PGE energy group, make the region one of the most important energy production and supply centers in the country.

The presence of heavy industry is offset by the natural beauty of the region. There are dozens of tourist trails associated with culture, history and nature, four of which are part of pan-European heritage trails. The region also attracts tourists with its 2,000 km of biking trails, rivers for canoeing and kayaking, and about 150 horse-riding centers.

In terms of education, the voivodship has nearly 30 institutions of higher education, including the world-famous Polish National Film, Television and Theater School, whose alumni include Oscar winners Roman Polański and Andrzej Wajda, as well as Oscar nominee Krzysztof Kieślowski.

When it comes to sport, one of the most visible teams is GKS Bełchatów, currently the only soccer club from Łódzkie in Poland's top league, Ekstraklasa. In other disciplines, Skra Bełchatów is one of Poland's best men's volleyball teams, while Budowlani Łódź was the 2009 Polish rugby champion.

MAJOR CITIES

Łódź

Poland's second-largest city in terms of population, Łódź, lies close to the geographical heart of the country. It sits at the (planned) crossroads of the A1 and A2 motorways, within 200 km of most other major Polish cities, an advantage which has led many firms to invest there.

Logistics is one sector in which Łódź has traditionally been strong. The city has also parlayed its industrial heritage into a modern economy, drawing investments in white goods manufacturing, IT and BPO from large multinationals such as Accenture, Indesit, DHL Express, Fujitsu Services and Nordea Bank.

Representatives of the city emphasize the quality and affordability of local workers. A number of respected institutions of tertiary education introduce new graduates to the labor force each year and the average monthly wage remains relatively low – well below that of smaller cities such as Wrocław, Gdańsk or even Rzeszów in H1 2008.

Infrastructure projects include the modernization of a railway line between Łódź and Warsaw, and reconstruction of the Łódź Fabryczna railway station. The "New Łódź Center" project, a massive



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scheme to revitalize and redevelop 90 ha of land in the city center, is additionally in the works. The project is scheduled for completion in 2017.

Łódź's once famous textile factories are also being adapted for residential and commercial purposes. Revitalized buildings now host lofts, offices and shopping centers.

As a cultural center, Łódź attracts cinephiles and music lovers to its annual Camerimage film festival and Festival of Dialogue of Four Cultures. The city is also in the running to become the 2016 European Capital of Culture.

Mayor: Jerzy Kropiwnicki

Area code: 0 42

Area: 293.25 sq km

Population (Dec 2008): 753,192

Labor force (Dec 2008): 486,705

Unemployment rate (June 2009): 8.1%

Percentage of city covered by zoning plans: 4.54%

Recent major investors: Apsys, Bosch-Siemens, Coca-Cola, Coko-Werk, Dell, DHL, Fujitsu Services, Gillette, Indesit, Laser Geosoft, Transition Technologies, Uniq, VF Polska

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Piotrków Trybunalski	78,475	67.24 sq km
Pabianice	69,470	32.99 sq km
Tomaszów Mazowiecki	65,935	41.30 sq km
Bełchatów	61,496	34.64 sq km
Zgierz	58,055	42.33 sq km

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LOWER SILESIA

KEY FACTS

Voivode: Rafał Jurkowlaniec

Marshall: Marek Łapiński

Area: 19,947 sq km

Population (Dec 2008): 2,877,059

Labor force (Dec 2008): 1,896,611

Unemployment rate (June 2009): 11.6%

Average monthly wage (2008): zł.3,224.91

GDP (2006): zł.85.77 billion

(8.08% of national GDP)

Natural resources: barytes, granite, natural aggregate, nickel ore, sandstone

Number of students in higher education (2007): 169,172

Number of institutions of higher education: 36

Major universities: Wrocław Medical Academy, Wrocław University, Wrocław University of Economics, Wrocław University of Technology

Major airport: Wrocław International Airport

Special Economic Zones:

Kamienna Góra Special Economic Zone for Medium Business: 397 ha

Legnica Special Economic Zone: 457 ha

Tarnobrzeg Special Economic Zone "EURO-PARK WISŁOSAN": 410 ha

Wałbrzych Special Economic Zone "INVEST-PARK": 1,218 ha



ESTIMATED INVESTMENT

Total (2007): zł.17.4 billion

(private sector: zł.11.93 billion; public sector: zł.5.47 billion)

Of which:

Industry: zł.7.06 billion, of which:

manufacturing: zł.5.11 billion

Construction: zł.2.14 billion

Real estate, renting and business activities: zł.1.86 billion

Trade and repair: zł.1.85 billion

Recent major investors: Acer, Bombardier Transportation, Bosch, BTR Automotive, Cadbury, Electrolux, Fagor, LG Electronics, McCain, Metro, Toyota, Volvo, Whirlpool

Sources of major foreign investment: Canada, France, Germany, Japan, South Korea, Spain, Sweden, the UK, the US

VOIVODSHIP BUDGET

2008:

Revenues: zł.971.25 million

Expenditures: zł.1.08 billion

Deficit: zł.115.8 million

2009 (projected):

Revenues: zł.1.02 billion

Expenditures: zł.1.33 billion

Deficit: zł.306 million

KEY CONTACTS

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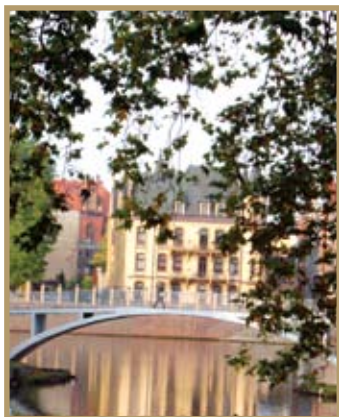
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➤ LOWER SILESIA VOIVODSHIP

Lower Silesia is currently one of the fastest-developing voivodships in Poland. Wrocław, its capital, has been a focal point for recent investments, but the region's secondary cities have also attracted their fair share of new business.



The city of Lubin, for example, has seen investment by companies such as British Petroleum, Jeronimo Martins and McDonald's. It is also a strong mining center, which boasts the headquarters of the KGHM copper conglomerate. Świdnica, meanwhile, is home to Electrolux and Nifco factories.

According to Lower Silesia's authorities, more than 4,600 companies with foreign capital are registered there, comprising around a third of the total number in the voivodship. They also point out that many banks and other financial institutions are locally headquartered, and that the growth of the regional economy has helped to attract or create a number of organizations, both governmental and non-governmental, whose purpose is to foster entrepreneurship.

A supply of well-educated labor and a history of technological achievement make the voivodship attractive for firms from the hi-tech sector. Indeed, the region hosts around a third of the companies operating in the Polish IT market. An abundance of engineers has also fueled the development of the white goods sector and the automotive industry.

Lower Silesia borders both the Czech Republic and Germany, an advantage which undoubtedly helps explain why it is one of the biggest exporters in Poland. Its top exports include machinery and electrical devices, non-ferrous metal materials, automotive vehicles and furniture, among other things.

City and regional authorities offer investors administrative assistance, tax breaks and support in the form of government and EU grants. In addition, no fewer than four special economic zones have subzones located in Lower Silesia, in which high-profile investors such as Toyota and Colgate Palmolive have sited projects.

The region is strategically located on the Oder River in the south-west of Poland, and is bisected by the A4 highway, which facilitates transport between Germany and eastern Poland. The continual development of road and broadband-internet infrastructure, as well as the development of a commuter railroad and rapid trams, will contribute to future growth in the region.



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MAJOR CITIES

Wrocław

Wrocław, the capital of Silesia voivodship, is a fast-growing cultural hub known for its young, educated residents. The city is one of the biggest educational centers in Poland, and the region's authorities are keen to emphasize the importance of the knowledge-based economy in today's business environment.

A number of large and innovative investments, such as a Google Innovation Center, a HP BPO center and an LG factory, have been sited in and around the city. The latter facility, located in a village just outside Wrocław, is one of the biggest greenfield investments Poland has seen to date – together with its suppliers, LG has created over 4,000 jobs and is to invest over €800 million by 2011.

Wrocław Mayor Rafał Dutkiewicz has earned a reputation for promoting his city indefatigably among foreign investors. He also lobbied heavily for Wrocław to host the Expo 2012 event and to become the home of the European Institute of Innovation and Technology; while the city lost out in the finals on both occasions, it still earned international attention. Efforts regarding the Euro 2012 soccer championship were more successful – the city will host matches in a new stadium being developed in the Maślice district.

Finally, Wrocław also plays a role as an acknowledged center of culture. It is home to a myriad of theaters, museums, art schools and a symphonic orchestra. In addition, each year the city plays host to a variety of festivals, such as the Era New Horizons International Film Festival and Wratislavia Cantans, an annual celebration of choral music held in city for over 40 years.

Mayor: Rafał Dutkiewicz

Area code: 0 71

Area: 96 sq km

Population (2008): 632,162

Labor force (2008): 420,486

Unemployment rate (June 2009): 4.4%

Percentage of city covered by zoning plans: 39.9%

Recent major investors: 3M, Amesbury, Capgemini, Esplex (Acer group), HP, HSV, Linde Gaz, Nokia Siemens Network, Opera Software, QHN, Sauer Danfoss, Sonoco, Tieto Enator

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Wałbrzych	122,411	84.70 sq km
Legnica	104,489	56.29 sq km
Jelenia Góra	85,378	109.22 sq km
Lubin	75,225	40.77 sq km
Świdnica	59,863	21.76 sq km



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LUBELSKIE

KEY FACTS

Voivode: Genowefa Tokarska

Marshall: Krzysztof Grabczuk

Area: 25,122 sq km

Population (Dec 2008): 2,161,832

Labor force (Dec 2008): 1,359,491

Unemployment rate (June 2009): 11.6%

Average monthly wage (2008): zł.2,825,18

GDP (2006): zł.40.84 billion (3.9% of national GDP)

Natural resources: coal, gas, limestone, marlstone, oil

Number of students in higher education (2007): 103,530

Number of institutions of higher education: 19

Major universities: Maria Curie-Skłodowska University in Lublin, the Catholic University of Lublin, the Lublin University of Technology

Major airports: None

Special Economic Zones:

EURO-PARK MIELEC Special Economic Zone: 112 ha

"Starachowice" Special Economic Zone: 99 ha

Tarnobrzeg Special Economic Zone "EURO-PARK WISŁOSAN": 50 ha

ESTIMATED INVESTMENT

Total (2007): zł.6.07 billion

(private sector: zł.3.44 billion; public sector: zł.2.63 billion)

Of which:

Industry: zł.1.51 billion, of which:

manufacturing: zł.934.5 million

Real estate, renting and business activity: zł.1.13 billion

Construction: zł.819.7 million

Transport, storage and communication: zł.679.3 million

Trade and repair: zł.450.5 million

Recent major investors: Augusta, Clondalkin Group

Sources of major foreign investment: France, Germany, Italy, South Korea, the Netherlands, the US

VOIVODSHIP BUDGET

2008:

Revenues: zł.795.77 million

Expenditures: zł.856.45 million

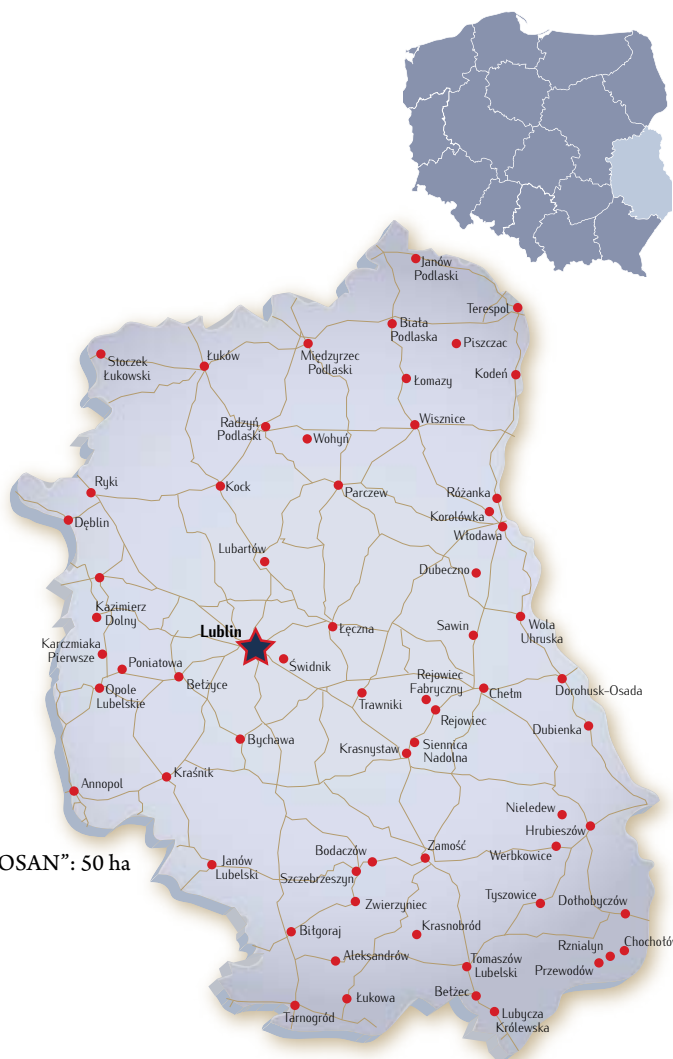
Deficit: zł.60.68 million

2009 (projected):

Revenues: zł.949.04 million

Expenditures: zł.987.63 million

Deficit: zł.38.59 million



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LUBELSKIE VOIVODSHIP

Relatively low labor costs, extensive agricultural resources and close proximity to Poland's border with Ukraine and Belarus – Lubelskie voivodship boasts a wealth of advantages for investors. Though the region is most obviously advantageous for agricultural investors, a look beneath the surface reveals opportunities in sectors such as tourism, sustainable energy, business process outsourcing and logistics. As one of Poland's poorest voivodships, it is also one of the largest recipients of EU structural funds.

Some 68 percent of Lubelskie comprises rich agricultural land, so it is no wonder that most of the region's main industries are tied to farming. The voivodship is responsible for 83 percent of the country's hops production, 75 percent of its raspberry production and 43 percent of its tobacco production. Its seven scientific-research institutes related to agriculture – including the University of Life Sciences in Lublin – support the industry with well-educated graduates.

The region's agricultural character doesn't mean its potential is limited to farming, however. With seven national, scenic and nature-reserve parks, agro-tourism is a strong and growing industry. And the region's tourism offer doesn't end there. Cities such as Chełm, Kazimierz Dolny and Zamość offer historical and regional land-

marks, as does the voivodship capital of Lublin, known throughout the country for its rich cultural and artistic heritage.

Lubelskie also has burgeoning biofuels and biomass industries, which will grow as Poland increases its production of sustainable energy. The voivodship's Regional Innovation Strategy focuses on such technologies, offering incentives to businesses investing in the sector.

Heavy industry – especially chemicals, mining and machinery – have a strong presence in the region as well. Auto manufacturing has been part of the economy since 1918, and a PZL Świdnik plant produces state-of-the-art helicopters.

But perhaps the region's biggest advantage – and its future success – lies in its abundance of quality human capital. The area is replete with highly regarded universities and institutions of higher education. Some 105,000 students study in the region, 47 percent of its population is 35 years of age or under, and salaries are just 88 percent of the national average. Officials point out that this makes the region perfect for BPO centers, and companies such as Orange, Inteligo, Telekomunikacja Polska and Genpact have already opened BPO facilities in the area.

MAJOR CITIES

Lublin

Although not as wealthy as some other regional capitals, Lublin is well-known for its rich history and culture. Perhaps that's why so many students – nearly 100,000 – are drawn to the city, known as one of Poland's most vibrant university towns. Lublin is also one of several in Poland vying for the title of European Capital of Culture in 2016.

The main universities in the city include the Maria Curie-Skłodowska University, the Lublin University of Technology, the Catholic University of Lublin and the University of Life Sciences in Lublin. In total, its 14 universities produce 20,000 graduates per year.

A relatively high percentage of the city is covered by zoning plans, which makes construction of new facilities easier. City authorities also offer property tax incentives for investors that create jobs there.

Lublin is Poland's ninth-largest city in terms of population, and as such offers a large market for businesses selling their goods and services. Purchasing power is not huge (it stands at about 44 percent of the national average), but the city also offers a relatively low cost of labor that investors should find attractive.

Local authorities offer investment incentives for businesses that create jobs, and are especially looking to develop the renewable energy, BPO and organic food sectors. The EURO-PARK MIELEC SEZ has a 70-ha subzone in the city, and the local authorities have significantly large amounts of EU structural funds at hand to encourage investment. Depending on the project, up to 70 percent of investment costs can be refunded by the city.

Lublin has also embarked on an ambitious investment program to build and resurface roads, construct sewage networks and furnish other vital infrastructure. The largest projects in the infrastructure program include a ring road around the city and an airport in Świdnik, just a few kilometers away from Lublin.

Mayor: Adam Wasilewski

Area code: 0 81

Area: 147 sq km

Population (Dec 2008): 350,462

Labor force (2008): 235,163

Unemployment rate (June 2009): 8.3%

Percentage of city covered by zoning plans: 43.8%

Recent major investors: Aliplast, Ball Packaging Europe Lublin, Batory Investment, Centrum Zana, Trans-Hurt

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Chełm	67,782	35 sq km
Zamość	66,375	30 sq km
Biała Podlaska	57,783	49 sq km
Putawy	49,386	50 sq km
Kraśnik	35,731	25 sq km



"Lublin Metropolitan Area
– Investor – Friendly" project coordinator

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KEY FACTS

Voivode: Helena Hatka

Marshall: Marcin Jabłoński

Area: 13,987.88 sq km

Population (Dec 2008): 1,008,481

Labor force (Dec 2008): 664,422

Unemployment rate (June 2009): 14.4%

Average monthly wage (2008): zł.2,747.87

GDP (2006): zł.24.9 billion (2.34% of national GDP)

Natural resources: brown coal, chalk, crude oil, gravel, loam, natural gas, sand

Number of students in higher education (2008): 29,748

Number of institutions of higher education: 8

Major universities: Collegium Polonicum in Slubice, University of Zielona Góra

Major airport: Zielona Góra Airport in Babimost

Special Economic Zones:

Kostrzyn-Slubice Special Economic Zone: 803 ha

Wałbrzych Special Economic Zone "INVEST-PARK": 2.5 ha

ESTIMATED INVESTMENT

Total (2007): zł.4.56 billion (private sector: zł.2.98 billion; public sector: zł.1.58 billion)

Of which:

Industry: zł.1.86 billion, of which:

manufacturing: zł.1.59 billion

Construction: zł.622.7 million

Real estate, renting and business activities: zł.558.2 million

Recent major investors: Caelum Development, Parkridge Retail Poland, TPV Displays, Trevira Reliance Group

Sources of major foreign investment: Germany, India, Ireland, the UK

VOIVODSHIP BUDGET

2008:

Revenues: zł.315.84 million

Expenditures: zł.338.74 million

Deficit: zł.22.9 million

2009 (projected):

Revenues: zł.437.56 million

Expenditures: zł.457.43 million

Deficit: zł.19.87 million



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LUBUSKIE VOIVODSHIP



Located along the central stretch of Poland's western border, Lubuskie voivodship is well positioned as a gateway to the German market. Indeed, the under-construction A2 motorway runs straight through the voivodship on its way towards Belarus.

It is the country's most sparsely populated voivodship, although this has not kept its GDP from steadily increasing over the past decade. At the same time, labor costs remain relatively low – the average monthly wage in 2008 was the third-lowest in the nation.

Lubuskie, which is home to around 500 lakes and many protected areas, has a reputation for natural beauty. Nearly half of

the voivodship is classified as wooded, a fact which explains the strength of the local wood and paper industry. Kostrzyn nad Odrą, for example, is perhaps best known for its paper plants – firms such as Hanke Tissue, Arctic Paper and ICT Poland have factories in the city today. As for production of wood-based products, Swedwood and Kronopol are just two firms from the sector with facilities in the voivodship.

A number of suppliers for the automotive industry are also present in the region, such as Faurecia in Gorzów Wielkopolski, Gedia in Nowa Sól and Moltech in Sulęcín. And from the food sector, Podravka and Associated British Foods have their Polish headquarters in Kostrzyn nad Odrą and in Nowa Sól, respectively.

The region is served by Zielona Góra-Babimost Airport, which has a catchment area of about three million potential passengers. Although primarily a domestic airport, a connection with Dresden, Germany, was to launch in H2 2009. The airport also serves as an important cargo port.

Ties between Germany and Lubuskie go beyond economic matters as well. Collegium Polonicum, a cross-border institution whose purpose is to serve as “an academic and cultural meeting place between Poland and Germany,” has been operating in the border town of Ślubice since 1992. It is seen as a symbol of successful cooperation between the two nations.

EU grants for your business in Poland!

Companies can obtain EU grants for i.a.:

- new investments and R&D projects,
- service centres (BPO, R&D and IT centres),
- renewable energy projects (e.g. wind farms, biofuels).

EU grants can finance **up to 70% of the project.**

In 2008 and 2009 PNO in Poland has obtained over **EUR 120 million in grants** for companies.

Check the chances of winning EU grants for your project! (questionnaire at www.pno.com.pl).

For further information, please contact:

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Inspire Improve Impact

MAJOR CITIES

Gorzów Wielkopolski

Gorzów Wielkopolski, the administrative seat of Lubuskie's voivode, is the voivodship's largest city in terms of both area and population. It has its own system of tax breaks and incentives for investors, and parts of the city are incorporated in the Kostrzyn-Słubice Special Economic Zone.

Gorzów is located along the S3 expressway, some 45 km from the German border. Local authorities have implemented a program aimed at monitoring the quality of life in the city, and they cite attractive land prices and relatively low labor costs as key enticements for investors. Tellingly, the city took first place in terms of attractiveness for foreign investors in *Forbes'* April 2009 ranking of medium-sized cities.

In 2007, Irish firm Caelum Development opened Galeria Askana in the city; at present, it is the largest shopping and entertainment center in the region in terms of total space. Other recent major investors include TPV Displays Polska (which invested €40 million, creating 3,000 jobs), carpentry center K-Shop Tech (which invested zł.6.8 million) and welding specialists IMC Engineering (which invested €1.8 million).

Gorzów is also famous for its local speedway team, Caelum Stal Gorzów. The city was home to Edward Jancarz, a world-renowned

speedway rider in 1970s and 1980s; the local speedway stadium is named after him and a monument has also been dedicated to him.

Mayor: Tadeusz Jędrzejczak

Area code: 0 95

Area: 85.73 sq km

Population (Dec 2008): 125,411

Labor force (Dec 2008): 84,674

Unemployment rate (June 2009): 6.4%

Percentage of city covered by zoning plans: 34%

Recent major investors: Caelum Development, IMC Engineering Polska, TPV Displays Polska

Key contacts:

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Zielona Góra

Lubuskie's second-largest city, Zielona Góra, is home to the voivodship Marshall's Office. The city lies around 60 km from the Polish-German border and offers property tax breaks for qualifying investors.

Zielona Góra has a long tradition of winemaking and is considered the wine capital of Poland. There are a few small private wineries located around the city, and the annual Winobranie wine festival is held every September. Vodka also occupies a place in local heritage and Luksusowa brand vodka is today distilled in the city.

Tabor Szynowy Opole, where modern rail cars are manufactured, is a century-old production facility located in Zielona Góra. Investors from other sectors headquartered in the city include electronics manufacturer ADB Global, GPS equipment maker Hertz Systems, metering equipment producer Lumel, frozen food producer Nordis and WSE-listed steel construction supplier Zastal. Parkridge Retail Poland, a developer of shopping centers, opened a Focus Park facility in September 2008.

The University of Zielona Góra, established in 2001 from the union of two local universities, is one of Poland's youngest public institutions of higher education. According to its own figures, the university serves around 17,000 students and produces over 4,000 graduates a year.

Like Gorzów Wielkopolski, Zielona Góra is known for its speedway team, Falubaz Zielona Góra, a four-time national championship winner. The city has partly funded expansion of the local speedway stadium.

Mayor: Janusz Krzysztof Kubicki

Area code: 0 68

Area: 58.34 sq km

Population (Dec 2008): 117,523

Labor force (Dec 2008): 78,637

Unemployment rate (June 2009): 6.3%

Percentage of city covered by zoning plans: 31.4%

Recent major investors: Aldemed, Euro Center, Lumel, Octagon Investment Holding - Valdi Spectrum Group, Parkridge Retail Poland, Trevira Reliance Group

Key contacts:

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Nowa Sól	40,300	22 sq km
Żary	38,739	33 sq km
Żagań	26,565	40 sq km
Świebodzin	21,708	11 sq km
Międzyrzecz	18,539	10 sq km



MAŁOPOLSKIE



KEY FACTS

Voivode: Jerzy Miller

Marshall: Marek Nawara

Area: 15,183 sq km

Population (Dec 2008): 3.28 million

Labor force (Dec 2008): 2.09 million

Unemployment rate (June 2009): 8.7%

Average monthly wage (2008): zł.2,903.63

GDP (2006): zł.78.8 billion
(7.4% of national GDP)

Natural resources: building stone, ceramic clay, coal, construction aggregate, geothermal sources, limestone, mineral water, rock salt, tin and lead ores, trace amounts of crude oil

Number of students in higher education (2008): 205,000

Number of institutions of higher education: 34

Major universities: Jagiellonian University, GH University of Science and Technology, Kraków University of Economics

Major airport: John Paul II International Airport Kraków-Balice

Special Economic Zones:

EURO-PARK MIELEC Special Economic Zone: 21 ha

Katowice Special Economic Zone: 22 ha

Kraków Technology Park Special Economic Zone: 523.1 ha



ESTIMATED INVESTMENT

Total (2007): zł.15.2 billion

(private sector: zł.10.18 billion; public sector: zł.5 billion)

Of which:

Industry: zł.4.92 billion, of which:

manufacturing: zł.3.85 billion

Real estate, renting and business activities: zł.2.81 billion

Trade and repair: zł.2.06 billion

Construction: zł.1.82 billion

Recent major investors: AIR Products, Allied Irish Bank, ArcelorMittal, Carlsberg, MAN

Sources of major foreign investment: Denmark, Germany, Ireland, the UK, the US

VOIVODSHIP BUDGET

2008:

Revenues: zł.1.16 billion

Expenditures: zł.1.24 billion

Deficit: zł.76.3 million

2009 (projected):

Revenues: zł.1.59 billion

Expenditures: zł.1.94 billion

Deficit: zł.351.3 million

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MAŁOPOLSKIE VOIVODSHIP

As Poland's fourth-largest voivodship in terms of population and the source of 7.4 percent of its GDP (2006), Małopolskie voivodship represents a powerful economic force, one with much to offer investors. The voivodship's advantages include a well-educated population, natural resources, investment incentives and well-developed infrastructure, all of which helped to attract FDI in 2007 worth around \$1.31 billion.

Małopolskie's advantages start with its large, educated workforce. The region's cultural heritage helps attract large numbers of students to its numerous institutions of higher education, which include highly regarded schools such as the AGH University of Science and Technology, the Cracow University of Economics and the internationally renowned Jagiellonian University. Labor costs are also relatively low, with the average local salary 10 percent below the national average.

With so many schools and students, it is little wonder that the region has become a magnet for companies looking to outsource business processes. Voivodship authorities are actively encouraging the growth of the sector and offer incentives for BPO investments. As a result, Małopolskie has more BPO centers than any other voivodship. International corporations such as Bayer, Ernst

& Young, Electrolux, Google, IBM Software, Philip Morris, Tesco and Lufthansa all have BPO centers in the region.

Where there is a highly educated workforce, hi-tech businesses tend to develop, and Małopolskie is no exception to the rule. To make the area even more attractive to firms in advanced-tech industries, the Kraków Technology Park, a special economic zone whose original purpose was to foster innovative businesses, was established. Today investors such as Motorola Polska Electronics, RR Donnelley Europe and Shell Polska all have presences in the park.

Other industries are strong in Małopolskie as well. Major employers include Carlsberg Polska, which has two breweries in the region, Coca-Cola, with a bottling plant in Niepołomice, and ArceorMittal, which has a rolling mill in Kraków.

As one of Poland's larger, wealthier voivodships, Małopolskie boasts well-developed transport infrastructure. The A4 highway, which will eventually run along the length of Poland from Germany to Ukraine, will span the voivodship. There is also John Paul II International Airport Kraków-Balice, which serves the entire region. Some three million passengers passed through the hub in 2008.

MAJOR CITIES

Kraków

With castles, medieval architecture and even a dragon's cave, Kraków has successfully capitalized on its history to become a top tourist destination. It is also considered by many to be the cultural capital of Poland, with several big museums, theaters and an opera. But when it comes to investment and industry, the city is not just building on the past – it's looking to the future.

Kraków's institutions of higher education, including Jagiellonian University – Poland's oldest university and one of the oldest in Europe – are extremely well-regarded and produce some of the country's top graduates. Thus it's little wonder that, like its voivodship, Kraków has seen waves of investment in BPO and hi-tech industries.

Assisting in this has been the Kraków Technology Park (KPT), a special economic zone focusing on hi-tech industries. The zone offers tax breaks to all investors, but especially for small and medium-sized businesses.

One good example of a business taking advantage of KPT's incentives is a deal signed between Onet.pl, Poland's leading internet portal, the city and Jagiellonian University. According to this deal, Onet.pl will build a new headquarters near the university's new campus in the Pychowice district, receiving significant tax breaks at the same time. The firm plans to move all of its Kraków staff and operations to the new site, creating a further 500 jobs in the process. The new premises will also host the local office of private television station TVN and are due to be completed sometime in 2010.

Other large firms which have invested in and around the city include Mitsubishi Electric Europe, Electrolux, IBM and Google.

Mayor: Jacek Majchrowski

Area code: 0 12



Area: 327 sq km

Population (Dec 2008): 754,624

Labor force (Dec 2008): 497,942

Unemployment rate (June 2009): 3.5%

Percentage of city covered by zoning plans: 14.7%

Recent major investors: Electrolux, Grupa Onet (ITI Group), Mitsubishi Electric

Key contacts:

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Tarnów	116,118	72 sq km
Nowy Sącz	84,468	58 sq km
Oświęcim	40,520	30 sq km
Chrzanów	39,452	38 sq km
Olkusz	37,249	25 sq km



MAZOWIECKIE

KEY FACTS

Voivode: Jacek Kozłowski

Marshall: Adam Struzik

Area: 35,558 sq km

Population (Dec 2008): 5,188,488

Labor force (Dec 2008): 3,319,515

Unemployment rate (June 2009): 8.2%

Average monthly wage (2008): zł.4,105.11

GDP (2006): zł.229.2 billion
(21.6% of national GDP)

Natural resources: aggregate, chalk, clay, gravel, loam, phosphorite

Number of students in higher education (2008): 364,617

Number of institutions of higher education: 104

Major universities: the University of Warsaw, the Warsaw School of Economics, the Warsaw University of Technology

Major airport: Warsaw Frederic Chopin Airport

Special Economic Zones:

Łódź Special Economic Zone: 50 ha

“Starachowice” Special Economic Zone: 23 ha

Suwałki Special Economic Zone: 24 ha

Tarnobrzeg Special Economic Zone “EURO-PARK WISŁOSAN”: 170 ha

Warmia-Mazury Special Economic Zone: 150 ha

ESTIMATED INVESTMENT

Total (2007): zł.41.54 billion

(private sector: zł.31.27 billion; public sector: zł.10.27 billion)

Of which:

Industry: zł.7.59 billion, of which:

manufacturing: zł.5.52 billion

Real estate, renting and business activities: zł.10.6 billion

Transport, storage and communication: zł.6.82 billion

Trade and repair: zł.4.4 billion

Financial intermediation: zł.3.2 billion

Construction: zł.2.95 billion

Recent major investors: Citi Group, Humax, Vantex

Sources of major foreign investment: Portugal, South Korea, the US

VOIVODSHIP BUDGET

2008:

Revenues: zł.2.56 billion

Expenditures: zł.3.08 billion

Deficit: zł.513.92 million

2009 (projected):

Revenues: zł.3.58 billion

Expenditures: zł.4.12 billion

Deficit: zł.543.24 million



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MAZOWIECKIE VOIVODSHIP

Comprising around 11.4 percent of Poland's total territory, Mazowieckie voivodship is the nation's nerve center and its economic heart. Thanks to its five million inhabitants and the presence of Poland's capital city, the voivodship enjoys the highest GDP per capita in the country – around 150 percent of the national average in 2006.

The region is literally a land of superlatives – it has the largest labor force in the country, the highest number of students, the greatest number of institutions of higher education and the most companies registered with foreign capital. The region also invests heavily in research and development and had the highest number of patents granted in 2008.

Mazowieckie's central location is a major asset and it possesses much of the country's best developed transport infrastructure. The government's head offices are located here, which helps to simplify the process of launching a new business, and the fact that most of Poland's large companies have headquarters or branch offices in the area makes it that much easier to continue doing business.

Another major asset is a well-qualified workforce, the majority of which (64 percent) is employed in services, although the manufacturing sector is also a big employer. In addition, the average salary is over 30 percent higher than national average, giving voivodship residents greater purchasing power than other Poles. At the same time, however, local officials stress that labor costs remain lower than in many other EU countries and that managers and specialists are internationally experienced and exceedingly competent.

In addition to manufacturing and services, another big industry in the voivodship is agriculture. Around 67 percent of the region is farmland, which amounts to around 13 percent of all of Poland's agricultural land. Mazowieckie's strong farm base in turn feeds a vast food-processing industry which is centered around the capital.

Other important industries include trade, tourism, telecommunications, financial services, insurance, IT and petrochemicals, a list which is by no means exhaustive. All businesses in the voivodship are served by Poland's most modern telecommunications infrastructure.



MAJOR CITIES

Warsaw

Like any capital city, Warsaw is an entity apart from its domestic brethren. It is the focal point for the national economy and the stage upon which the country's greatest political actors ply their craft. At the same time, it is the face which Poland shows to the world and its largest, most cosmopolitan city.

Warsaw hosts Poland's largest university, thousands of businesses and numerous cultural institutions. It is arguably the most important cultural center in Poland, though residents of Kraków and Łódź might grumble to the contrary.

The city is located at an important crossroads between Eastern and Western Europe, at an intersection of major domestic and international transportation routes. The largely underdeveloped markets of Belarus and Ukraine lie to the east, the Baltic states and Scandinavia to the north. Much of New Europe lies to the south, and to the west, Germany, Europe's largest economy.

Road, rail and air routes converge in Warsaw, linking these diverse markets. Infrastructure projects are underway all over the capital and its suburbs, not least of which are the construction of a ring road around the city and the extension of the A2 motorway towards Belarus. Warsaw Frederic Chopin Airport, for its part, serviced over 9.4 million passengers in 2008 and handles more than 80 percent of international flights to Poland. Passenger traffic unsurprisingly fell in 2009, but is expected to rebound and ongoing expansion of the airport aims to accommodate greater volume.

Poland's capital is home to a broad cross-section of industries, particularly services. The city's central location and the high standard of its office, telecommunications, transportation and business-service infrastructure have made it the country's most attractive destination for investment, both domestic and foreign. Approximately 20 percent of all direct foreign investment in Poland is sited in Mazowieckie voivodship, with over 80 percent of that volume ending up in the Warsaw area.

Foreign investors in the city come from a wide variety of countries – including investors from France, the Netherlands, the US, Germany, Great Britain and Italy – and have been particularly active in sectors such as banking, financial intermediation and retail. Warsaw's property market has seen dynamic growth in recent years too, with investors delivering numerous commercial and residential projects.

Warsaw is also home to the most important institutions in Poland's business environment, including chambers of commerce, independent think tanks and government institutions. The Warsaw Stock Exchange – the largest bourse in the region by both capitalization and listings – is a prominent role in of the national economy.

Mayor: Hanna Gronkiewicz-Waltz

Area code: 0 22

Area: 517 sq km

Population (Dec 2008): 1,706,600

Labor force (Dec 2008): 1,107,653

Unemployment rate (June 2009): 2.3%

Percentage of city covered by zoning plans: 21%

Recent major investors: Citi Group, Humax, Vantex

Key contacts:

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WARSAW

WWW.UM.WARSZAWA.PL



THE CITY

- CAPITAL OF THE MOST DYNAMICALLY DEVELOPING COUNTRY IN CENTRAL EUROPE
- 3.37 MILLION INHABITANTS THROUGHOUT THE WHOLE URBAN AGGLOMERATION AREA
- BEST TRANSPORTATION JUNCTION IN POLAND AND HOME OF THE MODERN INTERNATIONAL AIRPORT — FREDERIK CHOPIN AIRPORT
- LOWEST UNEMPLOYMENT RATE IN POLAND — 2.3% — AND AVERAGE REMUNERATION OF 1,000 EURO GROSS
- OVER HALF A MILLION COMPANIES OPERATE IN WARSAW
- 219 BANKS, OF WHICH EVERY FOURTH IS A HEAD OFFICE
- BY 2013 POLAND WILL HAVE 4.2 BILLION PLN (1 BILLION EURO) FROM THE EU FOR PROJECTS TARGETED AT THE DEVELOPMENT OF INFORMATION SOCIETY

GREEN SHELTER

- ALMOST HALF OF THE CITY IS GREEN SPACE
- VARIETY OF 80 PARKS OFFER PLACES FOR SPORT ACTIVITIES AND ARTISTIC EVENTS INCLUDING CHOPIN SUMMER CONCERTS IN ŁAZIENKI ROYAL PARK
- THE NATURAL BEAUTY OF THE VISTULA RIVER PASSES THROUGH THE CITY
- WALKING AND CYCLING PATHS, A BEACH AND A HARBOUR ARE BEING DEVELOPED ALONG THE RIVER BANK AS PART OF THE VISTULA NATURE PARK
- 200 KM OF EXISTING CYCLING PATHS WILL BE EXTENDED BY 700 KM

TOURIST FAVOURITES

- 3.3 MILLION FOREIGN TOURISTS WERE ATTRACTED TO WARSAW IN 2008
- CENTERS OF CULTURE INCLUDE: 50 THEATRES AND MUSIC CENTERS, 31 CINEMAS (FILMS SHOWN IN THEIR ORIGINAL LANGUAGES), OVER 100 ART GALLERIES
- IN THIS CITY OF HISTORICAL BUILDINGS, HISTORICAL WALKING PATHS INCLUDE 53 MUSEUMS, CHURCHES, A MOSQUE, A JEWISH CEMETERY, THE ROYAL CASTLE, THE WILANÓW PALACE AND

- THE OLD TOWN — A UNESCO WORLD CULTURAL HERITAGE SITE
- SPECIAL LOCAL GOODS INCLUDE HANDMADE CRAFTS AND POLISH FASHION

CHOPIN WAS FROM WARSAW

- A NUMBER OF IMPORTANT CULTURAL AND MUSICAL EVENTS WILL CELEBRATE THE 200TH ANNIVERSARY OF THE BIRTH OF THE WORLD-CLASS COMPOSER — FRYDERYK CHOPIN, IN 2010
WWW.UM.WARSZAWA.PL/CHOPIN2010
- RENOWNED ARTISTS FROM ALL OVER THE WORLD WILL PERFORM AT INTERNATIONAL EVENTS LIKE THE INTERNATIONAL FRYDERYK CHOPIN PIANO COMPETITION, LUDWIG VAN BEETHOVEN EASTER FESTIVAL, WARSAW AUTUMN, ORANGE WARSAW FESTIVAL, WARSAW SUMMER JAZZ DAYS...
- WARSAW IS ENCOURAGING FAST DEVELOPMENT IN ORDER TO BECOME EUROPEAN CAPITAL OF CULTURE IN 2016

EDUCATION

- FOREIGN LANGUAGE EDUCATION FROM KINDERGARTEN TO MBA LEVEL IS AVAILABLE IN WARSAW
- "THE AMERICAN SCHOOL OF WARSAW" — THE FIRST AUTONOMOUS INTERNATIONAL SCHOOL IN POLAND, TODAY HOSTS STUDENTS OF 40 NATIONALITIES, CHILDREN PARTICIPATE IN THE IBO PROGRAM FROM KINDERGARTEN TO BAC EXAMS. THE TUITION IS USUALLY REFUNDED BY PARENTS' COMPANIES
- "LYCEE FRANCAIS DE VARSOVIE" FOR STUDENTS AGED FROM 3 TO 18 YEARS OLD, ALSO ACCEPTS ENTRIES FROM NON-FRENCH-SPEAKING CANDIDATES. IT HAS STUDENTS FROM 29 NATIONS AND BOASTS A HIGH TEACHING STANDARD GUARANTEED BY QUALIFIED TEACHERS FROM FRANCE AND POLAND
- "THE WILLY BRANDT'S POLISH-GERMAN SCHOOL" FOR MEETINGS AND DIALOGUE IN WARSAW IS A GERMAN SCHOOL SPECIALIZED IN LANGUAGE EDUCATION — THE STUDENTS LEARN GERMAN AT NATIVE-SPEAKER LEVEL AS THEIR NATIVE LANGUAGE, AS WELL AS ENGLISH AND FRENCH AT THE BAC EXAMS LEVEL
- THE BEST UNIVERSITIES IN POLAND ARE LOCATED IN WARSAW. AROUND 300,000 YOUNG PEOPLE STUDY EVERY YEAR IN THE CITY CENTER. A VARIETY OF POSTGRADUATE AND MBA COURSES ARE HELD IN CO-OPERATION WITH EUROPEAN AND AMERICAN EDUCATIONAL INSTITUTIONS

PROJECTS IN PROGRESS

- COMPLETION OF THE COPERNICUS SCIENCE CENTRE, IN 2010
- ŻENIAŁ PORT WILL BE MORE THAN JUST A YACHT MARINA. FACILITIES FOR SPORTS LOVERS WILL INCLUDE A MODERN WATER PARK, A CLIMBING WALL, BUNGEE JUMPING FACILITIES AND AN ENTERTAINMENT AREA FOR SPORTS TOURNAMENTS
- SOCCER FANS WILL WELCOME EURO 2012 CHAMPIONSHIP MATCHES AND A BRAND NEW NATIONAL STADIUM FOR 55,000 SPECTATORS

Radom

Situated in the southern section of Mazowieckie voivodship, Radom is a major regional transportation hub as well as an important academic center. The city lies at the intersection of a number of national roads and railways, approximately 100 km from the Polish capital on the way to Kielce and Kraków.

The city hosts over 10 institutions of higher education with almost 30,000 students, and in general it boasts a younger population than the national average. These two factors have furnished Radom with a well-qualified labor force.

Radom is trying to attract investors through a number of different incentives and offers, which now include land incorporated within the Tarnobrzeg Special Economic Zone as well as the presence of other areas specially designated by the city for investment purposes. Companies investing in Radom may apply for different kinds of public aid and can count on property tax exemptions lasting for up to five years, depending on the number of jobs created.

The city is home to approximately 24,500 economic entities, and has seen its services sector quickly develop in recent years. Metal, food, tobacco, construction materials and cosmetics producers are all present in Radom, with major international investors such as American developer AIG/Lincoln, international tobacco producer and distributor Altadis, German supplier of production process technologies Dürr and the Netherlands-based International Tobacco Machinery, a producer of tobacco industry equipment.

In the upcoming years, Radom will see the delivery of a number of major investment projects, including the construction of a data processing center for the Finance Ministry, development of the Cen-

trum Słoneczne mixed-use real estate project, revitalization of the city center, opening of a new stadium and passenger airport as well as modernization of a railroad link connecting Warsaw and Kraków.

Mayor: Andrzej Kosztowniak

Area code: 0 48

Area: 111.8 sq km

Population (Dec 2008): 224,226

Labor force (Dec 2008): 146,550

Unemployment rate (June 2009): 20.5%

Percentage of city covered by zoning plans: approximately 8%, plans to increase this to 30% in 2010

Recent major investors: AIG/Lincoln Polska, International Tobacco Machinery

Key contacts:

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Płock

Mazowieckie's third-largest city, Płock, is perhaps best known as a center of heavy industry. It is home to PKN Orlen, Poland's biggest oil refiner, and to PERN, the state-owned firm which operates the Friendship ("Przyjaźń") Pipeline as well as a number of large oil storage tanks. Another large employer in the city is Warsaw Stock Exchange-listed Mostostal Płock, a subsidiary of Mostostal Warszawa which specializes in the construction of industrial tanks for the chemical industry. The presence of such big firms supports a large number of suppliers and other businesses peripherally involved in these industries.

Płock has also created an office to serve potential investors' needs and to assist them with investment incentives. These include grants designated for training newly employed personnel, as well as tax breaks and exemptions in return for creating jobs.

Another initiative, launched together with Orlen, is the Płock Industrial and Technological Park (PPP-T), which comprises 200 ha of land for investment. A number of Orlen subsidiaries, construction companies, as well as an IT firm and representatives of several other industries have chosen to site their headquarters at PPP-T.

When it comes to labor, Płock is well positioned. It has a population of about 130,000, over a quarter of whom are below the age of 20, making the city one of the youngest municipalities in the country.

Mayor: Mirosław Milewski

Area code: 0 24

Area: 88 sq km

Population (Dec 2008): 126,709

Labor force (Dec 2008): 84,813

Unemployment rate (June 2009): 10.6%

Percentage of city covered by zoning plans: 36.6%

Recent major investors: Adler, Brenntag, CNH, DHL Express

Key contacts:

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Siedlce	76,939	32 sq km
Pruszków	55,621	19 sq km
Ostrołęka	54,109	29 sq km
Legionowo	51,058	14 sq km
Ciechanów	45,475	33 sq km

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Poleczki Business Park, 124 Holubcowa Str. / Poleczki Str., Warsaw - Southern End of Mokotów



OPOLSKIE

KEY FACTS

Voivode: Ryszard Wilczyński

Marshall: Józef Sebesta

Area: 9,412 sq km

Population (Dec 2008): 1,034,656

Labor force (Dec 2008): 677,617

Unemployment rate (June 2009): 11.2%

Average monthly wage (2008): zł.2,977.96

GDP (2006): zł.23.34 billion (2.2% of national GDP)

Natural resources: agricultural resources, limestone, marlstone

Number of students in higher education (2007): 37,662

Number of institutions of higher education: 8

Major universities: Higher School of Management and Education in Opole, Opole University, Opole University of Technology, State Professional Medical School

Major airports: None

Special Economic Zones:

Katowice Special Economic Zone: 170 ha

"Starachowice" Special Economic Zone: 17 ha

Wałbrzych Special Economic Zone "INVEST-PARK": 284 ha

ESTIMATED INVESTMENT

Total (2007): zł.3.72 billion

(private sector: zł.2.24 billion; public sector: zł.1.48 billion)

Of which:

Industry: zł.1.64 billion, of which:

manufacturing: zł.1.32 billion

Trade and repair: zł.295 million

Construction: zł.283.7 million

Transportation, storage and communication: zł.180.5 million

Agriculture: zł.158.1 million

Recent major investors: Cadbury, HeidelbergCement, Marcegaglia, Nestlé, Peri, Saint Louis Sucre

Sources of major foreign investment: Germany, Italy, the Netherlands, the UK, Ukraine

VOIVODSHIP BUDGET:

2008:

Revenues: zł.388.9 million

Expenditures: zł.419 million

Deficit: zł.30.1 million

2009 (projected):

Revenues: zł.351.5 million

Expenditures: zł.398 million

Deficit: zł.46.5 million



KEY CONTACTS

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OPOLSKIE VOIVODSHIP

In terms of population, Opolskie voivodship surpasses only Lubuskie in the east; in terms of area, is the smallest voivodship in Poland. The reason for this is that Opolskie was due to be absorbed into Silesia during the administrative reform of 1999, but large protests resulted in the voivodship's pre-1999 shape being left largely untouched.

Smallest does not equate to worst, however. For one thing, for the 2007-2013 period over €150 million in EU funds has been designated in Opolskie for the support of investment and innovation in business, making it the greatest regional beneficiary of EU largesse in Poland.

Opolskie's best-developed industries include construction, food-stuffs, production of machinery and appliances, chemicals, petroleum energy, minerals. Local authorities, moreover, are actively working to develop these sectors, as well as others such as metals and the automotive branch.

Agriculture is described as a strong asset; much time and effort has been spent to develop local farming to a high standard. Land is

also available for investment with tax incentives, around 5,000 ha according to representatives of the voivodship. Around 10 percent of this land is sited in three different special economic zones.

Transportation infrastructure, the arteries of any administrative body, is under constant development. Opolskie is already crossed by the A4 motorway, which provides a fast link to international airports in Wrocław and Katowice, and it also has strong rail links. Projects under development include a local airport in Kamień Śląski and three municipal ring roads.

Among other advantages, local authorities also note their close proximity to the Czech Republic and a strong educational system, the latter of which has proven useful in attracting investments in modern research centers.

Opolskie is also home to the largest concentration of Poland's German minority community, which amounts to nearly 10 percent of the voivodship's population. Many of these people work seasonally in Germany, remitting their earnings back to their families.



MAJOR CITIES

Opole

Over the last few years Opole, the voivodship capital, has seen a boom in development of retail centers and residential projects, providing new jobs and homes.

Entrepreneurship is high in the city, boosted by property tax breaks and refund programs, as there are almost 158 companies per 1,000 residents. The strength of business has been recognized elsewhere, too – in April 2009 *Forbes* ranked the city second among medium-sized municipalities in terms of attractiveness for business, and third among cities regarding attractiveness for foreign capital.

Various incentives exist for investment, including land located within the Wałbrzych Special Economic Zone "Invest-Park," which offers an investor assistance program and an income tax break of up to 70 percent of investment value. Recent foreign investment in both Opole and the region has come largely from the food and construction industries, with investors such as Danone, Zott, Cadbury, Norgips, Monier, Velux and Heereman Fabrication Group.

Interestingly, Opole markets itself as a city of young people – over 36 percent of its population is aged 30 and under. In 2007 the city authorities launched a program aimed at holding on to young people, especially graduates of higher education, featuring the catchphrase: *Opolskie, tu zostaję!* (Opolskie, here I remain!). The goal was to put a halt to the exodus of young people seeking jobs abroad or in cities like Wrocław or Katowice. Within the program, voivodship authorities assist young people in finding work or creating their own firms, and help those still in school with training and scholarships.

Opole is also famous for the National Festival of Polish Song, an annual celebration of Polish music organized and televised by TVP.

Mayor: Ryszard Zembaczyński

Area code: 0 77

Area: 96 sq km

Population (Dec 2008): 126,203

Labor force (Dec 2008): 86,016

Unemployment rate (June 2009): 5.2%

Percentage of city covered by zoning plans: 28%

Recent major investors: Gea Technika Cieplna, HFG, Mayland Real Estate, Metro Group, Tesco, Zott

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Kędzierzyn-Koźle	64,960	123.42 sq km
Nysa	45,982	27.5 sq km
Brzeg	37,625	14.6 sq km
Kluczbork	25,355	12.35 sq km
Prudnik	22,927	20.48 sq km

MAZOVIA'S Great potential

About Mazovia

Mazovia is the best known Polish district which popularity is based first of all on being the biggest and centrally situated region in the country hence it has easily become an economic leader. Due to its central location, large and absorbent market (more than 5 million inhabitants) which constantly improves as well as its educated and qualified population, Mazovia tends to perform as the most frequently picked up region by overseas investors. Almost 30% of the largest foreign investments are settled exactly here and one of the main reasons of that is the central localization at the crossroads of trade routes, thanks to which Mazovia nowadays is a promising district and has the greatest chances to become an important and equal region in the entire European Union.

Mazovia is the fastest growing voivodeship in Poland that exploits the changes most effectively and is the place where all the economic dynamic transformations of the last decade are visibly seen. Promptly taking an intended advantage of these transformations led Mazovia to position of the economic and change leader among Polish regions. In no other region in the whole country changes went so instantly and so successfully. Mazovia's high in various ways attractiveness beats other regions of Poland and at the same time it draws numerous foreign tourists what makes this region the most visited in Poland. This fact is highly significant to Mazovia's economy (about 5 million people annually, almost 30% of the total number of visitors to Poland).

Mazovia is the voivodeship with a commonly known great history, stunning monuments and of course the immense economic potential and above all – it permanently gets more and more well-prepared to play a significant role among European regions.

Poland, the country situated in the very heart of Europe, is the main beneficiary of foreign direct investments (FDI) in Central Europe: In years 2006, 2007 and 2008 an average FDI worth around EUR 14,4 billion. According to the Polish Agency for Foreign Investments (PAIIZ) the most important factors which incline investors to choose Poland as an investment location are the size and absorbency of the market (nearly 40 million inhabitants – the largest country in central Europe), the low labour costs (one of the lowest on the continent), favourable business environment, growing integration with the worldwide economy and the success of Polish privatization. Over 70% of the capital invested in Poland comes from European companies.



Why investors choose Mazovia?

- Geographic location
- Infrastructure
- Market's absorptivity
- Labour market availability
- Development huge potential
- Accessibility of investment incentives and attractive plots as well



Investor assistance

- Investment offers presentation
- Assistance at location selecting process
- Study tours organisation

Support for Polish entrepreneurs

- Promoting export
- Assistance in commercial and trading missions
- Tracing contacts with potential investors

Contact us
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www.armsa.eu, www.mazovia.pl





PODKARPACKIE

KEY FACTS

Voivode: Mirosław Karapyta

Marshall: Zygmunt Cholewiński

Area: 17,845 sq km

Population (Dec 2008): 2,099,495

Labor force (Dec 2008): 1,333,169

Unemployment rate (June 2009): 14.2%

Average monthly wage (2008): zł.2,680.01

GDP (2006): zł.39.89 billion

(3.8% of national GDP)

Natural resources: gas, limestone, oil, sandstone, sulfur, timber

Number of students of higher education (2007): 70,041

Number of institutions in higher education: 17

Major universities: Rzeszów University of Technology, the University of Rzeszów

Major airport: Rzeszów International Airport

Special Economic Zones:

EURO-PARK MIELEC Special Economic Zone: 859 ha

Kraków Technology Park Special Economic Zone: 5.74 ha

Tarnobrzeg Special Economic Zone "EURO-PARK WISŁOSAN": 600 ha



ESTIMATED INVESTMENT

Total (2007): zł.7.02 billion

(private sector: zł.4.84 billion; public sector: zł.2.18 billion)

Of which:

Industry: zł.2.60 billion, of which:

manufacturing: zł.1.98 billion

Real estate, renting and business activities: zł.1.49 billion

Trade and repair: zł.620.6 million

Construction: zł.598.0 million

Transport, storage and communication: zł.415.4 million

Recent major investors: BorgWarner Turbo System, MTU Aero Engines

Sources of major foreign investment: Austria, Germany, the US

VOIVODSHIP BUDGET:

2008:

Revenues: zł.698.59 million

Expenditures: zł.646.01 million

Surplus: zł.18.31 million

2009 (projected)

Revenues: zł.1.339 billion

Expenditures: zł.1.473 billion

Deficit: zł.134 million

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PODKARPACKIE VOIVODSHIP

Situated in the southeastern-most corner of Poland, Podkarpackie has long been renowned for its natural beauty as part of the greater Bieszczady forest and mountain region. At the same time, the voivodship has become a center of dynamic development, hosting, for example, the most prolific aerospace cluster in the country, with some 80 percent of the nation's aerospace industry concentrated there.

Most of this aerospace investment is centered on the Podkarpackie Science and Technology Park Aeropolis, which has been incorporated into the EURO-PARK MIELEC Special Economic Zone and thus offers the SEZ's investment incentives. Taken together, the cluster is known as Aviation Valley and boasts investors such as MTU Aero Engines Polska (manufacturing turbine vanes and rotor blades), BorgWarner (turbochargers) and Goodrich Corporation. In addition, there are plans to expand Aeropolis by 51 ha, meaning there will be plenty of room for new entrants.

Voivodship authorities emphasize that other high-tech industries are welcome as well, and the region's SEZs and numerous tech parks have infrastructure to support them. Information Technology is one such industry – Asseco Poland, for example, has its headquarters in the voivodship capital of Rzeszów.

With a significant portion of the population aged under 25, and with over 70,000 students in the area at institutions such as the University of Rzeszów and the Rzeszów University of Technology, there is a wealth of qualified human capital. The latter university also boasts the country's only specialized civil aviation center.

Infrastructure is a major plus as well. Just minutes away from Aeropolis is Rzeszów-Jasionka International Airport, with direct connections to Dublin, Frankfurt, London (Luton and Stanstead) and New York (JFK and Newark). The airport has seen passenger numbers rise dramatically over the past three years, and serving nearly 324,000 passengers in 2008. There is easy access to eastern and southern markets as well, as Podkarpackie borders both Ukraine and Slovakia.

The region's natural beauty, while perhaps less fashionable than aerospace or IT investments, presents its own opportunities for business development. The Bieszczady range of the Carpathian Mountains is well-known among Poles for its unspoiled nature, and the voivodship prides itself on its national and scenic parks. The tourism industry is thus a prime candidate for investment.

MAJOR CITIES

Rzeszów

The capital of the Podkarpackie voivodship, Rzeszów, is by far the most important economic, scientific and cultural center in the region. It lies at the heart of Aviation Valley, the cluster of businesses, technology parks and research institutions devoted to the aerospace industry. WSK PZL Rzeszów, which manufactures airplane engines, is one of the city's largest employers.

While Rzeszów is naturally looking to encourage further investment in the aerospace industry, local officials also want to attract investors from the automotive, pharmaceutical and IT sectors. The latter is supported by the Podkarpackie IT Cluster, an association of 15 companies sited in the region. Major regional investors uninvolved in the aviation industry include Asseco Poland (information technology), Makarony Polskie (pasta production) and Zelmmer (white goods).

With a GDP per capita at less than 50 percent of the national average, Rzeszów is home to a wealth of well-qualified, affordable labor. Infrastructure and location are two other important advantages: an international airport is not far from the city center, and the future A4 motorway will provide a direct connection to Western Europe. The city is 100 km from Slovakia and just 90 from Ukraine.

Tax breaks are available to businesses which create jobs in the city – bringing in 40 or more jobs can earn companies up to 60 months free of property taxes. And of course there are tax breaks and other incentives for businesses which invest in the Rzeszów subzone of the EURO-PARK MIELEC Special Economic Zone.

Mayor: Tadeusz Ferenc

Area code: 0 17

Area: 92 sq km

Population (Dec 2008): 171,227

Labor force (Dec 2008): 111,435

Unemployment rate (June 2009): 6.7%

Percentage of city covered by zoning plans: 8.5%

Recent major investors: Conres, Womak, MTU Aero Engines, BorgWarner

Key contacts:

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Przemyśl	66,867	44 sq km
Stalowa Wola	64,988	83 sq km
Mielec	61,005	47 sq km
Tarnobrzeg	49,771	85 sq km
Krosno	47,479	44 sq km



PODLASKIE

KEY FACTS

Voivode: Maciej Żywno

Marshall: Jarosław Dworżański

Area: 20,187 sq km

Population (Dec 2008): 1,191,470

Labor force (Dec 2008): 751,379

Unemployment rate (June 2009): 11%

Average monthly wage (2008): zł.2,852.70

GDP (2006): zł.24.42 billion (2.3% of national GDP)

Natural resources: clay, gravel, ilmenite-magnetite ore, sand, timber

Number of students in higher education (2007): 52,800

Number of institutions of higher education: 19

Major universities: the Białystok Technical University, the Medical University of Białystok, the University of Białystok

Major airports: None

Special Economic Zone:

Suwałki Special Economic Zone: 156 ha

ESTIMATED INVESTMENT

Total (2007): zł.4.26 billion

(private sector: zł.3.06 billion; public sector: zł.1.20 billion)

Of which:

Industry: zł.1.49 billion, of which:

manufacturing: zł.1.18 billion

Real estate, renting and business activities: zł.767.53 million

Trade and repair: zł.384.34 million

Construction: zł.233.75 million

Recent major investors: Budzinsky + Hor, CBR Baltic, Lactalis

Sources of major foreign investment: France, Germany, the Netherlands

VOIVODSHIP BUDGET

2008:

Revenues: zł.341.31 million

Expenditures: zł.345.33 million

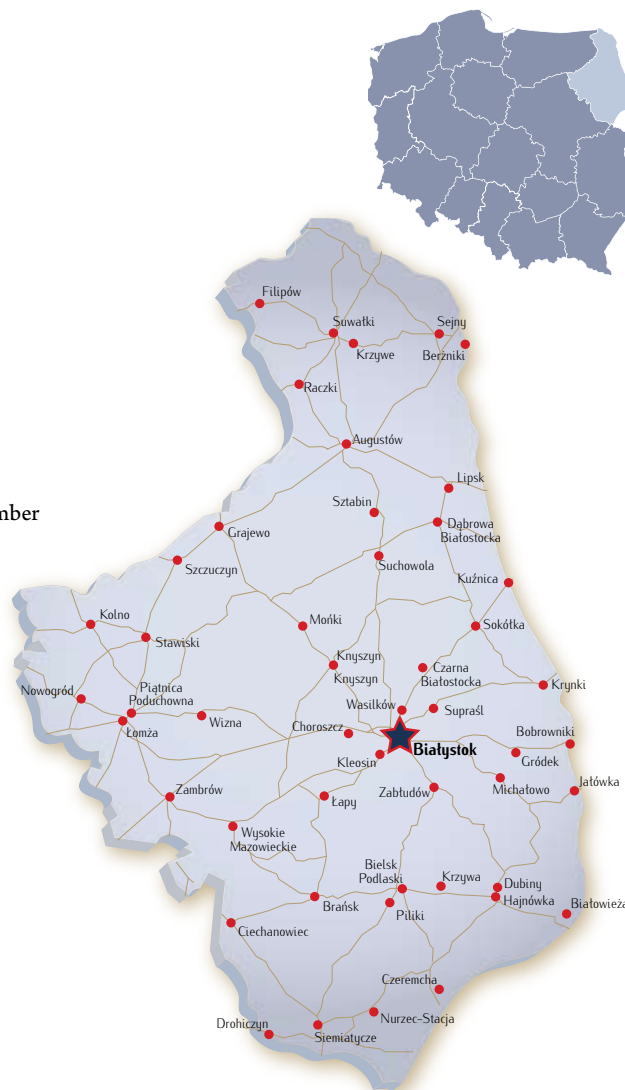
Deficit: zł.4.01 million

2009 (projected):

Revenues: zł.455.89 million

Expenditures: zł.473.53 million

Deficit: zł.17.63 million



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PODLASKIE VOIVODSHIP

Tucked up in Poland's northeastern corner, Podlaskie is a region of great strategic and economic worth. It is also an area whose potential remains largely untapped – its GDP in 2006 was the second lowest in the nation – and poor transportation infrastructure has been partly to blame for this. The situation is changing, however.

Podlaskie borders both Lithuania and Belarus, making it a prime location for businesses interested in those and other eastern markets. A number of major infrastructural investments are in various stages of development in the region, including the Via Baltica expressway, which will connect Scandinavia with Central Europe, and a new regional airport in Białystok. These projects should give the voivodship a boost.

The regional economy is largely agricultural in character and local authorities emphasize the potential for profitable investment in this sector. Dairies in Podlaskie are among the largest and most modern of their kind in Poland, for example, and there's a stable market for locally grown produce and livestock. The voivodship offers incentives for investment as well as

business advisory and legal services for entrepreneurs in the branch.

Podlaskie's landscape includes a number of unique environmental assets, including numerous lakes, wetlands and primeval forests, many of them within the region's national parks and other preservation areas. There are also around 3,000 km of nature trails stretching up into Lithuania. These natural resources have been instrumental in the development of local tourism infrastructure over the past few years.

The region is also traditionally strong in the production of machinery such as tractors, lawn mowers and machine tools. Representatives of the voivodship note that investors in this sector have access to a well-developed network of suppliers, as well as to consumers and appropriately qualified workers.

At the same time, local authorities are eager to entice investments in thoroughly modern fields such as IT, BPO and innovative technology. To this end they are developing the necessary infrastructure and offering incentives through special structures such as the Suwałki Special Economic Zone.



MAJOR CITIES

Białystok

The city of Białystok, capital of Podlaskie, is by far the most important economic, academic and cultural center in the voivodship. In recent years it has also been a prime example of the region's ongoing modernization and development.

For one thing, a number of infrastructure investments are underway or planned for Białystok, including the Via Baltica and Rail Baltica transport corridors. The local real estate market is still unsaturated as well. This fact has drawn property investors and developers over the past few years; they have delivered, among other things, a number of large-scale shopping centers in the city.

Industries prominent in Białystok include production of food and spirits, production of tools and electrical equipment, manufacturing of wood-based products, textile production and construction. However, local authorities stress that the city has strong potential for investment in sectors such as biotech and pharmacology, materials technology, electronics and high-quality chemical products.

One initiative designed to facilitate such investments is the Białystocki Science and Technology Park, which is scheduled for completion at the end of 2012. City Hall also notes the presence of around 45,000 students in Białystok, offering investors a young, educated pool of potential employees. As well, there are a number of organizations – both public and independent – which serve the business community, including two centers for innovation and technology transfer which are sited in local universities.

Mayor: Tadeusz Truskolaski

Area code: 0 85

Area: 102 sq km

Population (Dec 2008): 294,143

Labor force (Dec 2008): 196,425

Unemployment rate (June 2009): 10%

Percentage of city covered by zoning plans: 25.4%

Recent major investors: JWK Group, Meinl European Land Group, Spirit International

Key contacts:

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Suwałki	69,281	66 sq km
Łomża	63,036	33 sq km
Augustów	30,343	81 sq km
Bielsk Podlaski	26,577	27 sq km
Zambrów	22,598	19 sq km



POMORSKIE

KEY FACTS

Voivode: Roman Zaborowski

Marshall: Jan Kozłowski

Area: 18,310 sq km

Population (Dec 2008): 2,219,512

Labor force (Dec 2008): 1,433,493

Unemployment rate (June 2009): 10.1%

Average monthly wage (2008): zł.3,277.60

GDP (2006): zł.60,250 million
(5.7% of national GDP)

Natural resources: gravel, peat, sand

Number of students in higher education (2007): 100,157

Number of institutions of higher education: 28

Major universities: the Gdańsk University of Technology, the University of Gdańsk

Major airport: Gdańsk Lech Wałęsa Airport

Special Economic Zones:

Pomeranian Special Economic Zone: 448 ha

Słupsk Special Economic Zone: 178 ha



ESTIMATED INVESTMENT

Total (2007): zł.12.415 billion

(private sector: zł.8.718 billion; public sector: zł.3.697 billion)

Of which:

Industry: zł.2.721 billion, of which:

manufacturing: zł.2.033 billion

Construction: zł.2.564 billion

Real estate, renting and business activities: zł.2.445 billion

Trade and repair: zł.1.573 billion

Transport, storage and communication: zł.1.059 billion

Recent major investors: Acxiom, Arla Foods, Compuware, First Data, Geoban, IBM, Macquarie Bank, Thomson Reuters, Zensar Technologies Limited

Sources of major foreign investment: Germany, Spain, the UK, the US

VOIVODSHIP BUDGET

2008:

Revenues: zł.750.11 million

Expenditures: zł.712.23 million

Surplus: zł.37.88 million

2009 (projected):

Revenues: zł.858.05 million

Expenditures: zł.1.17 billion

Deficit: zł.316.66 million

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➤ POMORSKIE VOIVODSHIP

While Pomorskie voivodship possesses a wide range of natural resources, it has undoubtedly capitalized most successfully on its access to the Baltic Sea. The region's long coastline has attracted both profit-seekers and vacationers for centuries, and it is home to Poland's two largest seaports, in Gdańsk and Gdynia respectively.

Unsurprisingly, tourism and logistics remain big industries in the voivodship, with refining having become another pillar of the economy during the 20th century. Given its prime location and relatively strong infrastructure, the local authorities would like to develop the area into a major European logistics hub. One of the largest investments in recent years – the construction of a deepwater container terminal in Gdańsk – offers a good example of how the voivodship is pursuing this goal.

Another traditional industry, shipbuilding, is in decline. But this trend has been counterbalanced by investments from the IT and BPO sectors, with international firms such as IBM, First Data and Thomson Reuters present in the region. A 2009 report published

by consulting firm KPMG listed Gdańsk as one of 31 most attractive locations for IT investments in the world. Most investment to date has come from the United States and Western Europe, although growing interest from Indian, Chinese and Middle Eastern businesses has also been witnessed.

The voivodship is now trying to attract investments through a number of incentives, including the offers of the Pomeranian and Słupsk special economic zones and a number of industrial and technology parks.

One major challenge facing the voivodship is the need to complete a number of large infrastructure projects necessary to ensure further economic development and to prepare for the Euro 2012 soccer championships. Partly financed with the help of EU funds, the planned investments will include, among other things, new sports infrastructure, expansion of the international Gdansk Lech Wałęsa Airport, construction of a new metropolitan railway and delivery of major road projects.



➤ MAJOR CITIES

Gdańsk

Investors might find Gdańsk a highly attractive location simply by virtue of its role as the primary constituent of the Tri-city agglomeration – one of the largest metropolitan areas in Poland – and the nation's principal seaport. But the city has much to offer on its own.

Gdańsk is one of the most proactive cities in the country when it comes to attracting investment. It has established a wide range of aid agencies and organizations to support business at every stage of investment, from help in obtaining building permits and financing, to recruitment and PR. And an amazing 70 percent of the city is covered by zoning plans, the highest percentage in a major Polish city.

Local authorities boast that this aggressive strategy has helped to halve unemployment over the past four years and dramatically raise standards of living. Gdańsk's GDP per capita is the fifth-highest in the country.

The city has put a premium on small and medium business investment, especially from firms in knowledge-based industries such as hi-tech and IT. Officials say the region has become a veritable "IT basin," with major investments from firms such as IBM, Acxiom, Fineos and Zensar Technologies. Advanced manufacturing investors include ThyssenKrupp Krause and Suruga Seiki.

Investment support organizations include the Pomorskie Special Economic Zone and Gdańsk Science and Technology Park, the city's Business Services Center, the Gdańsk Economic Development Agency, the Gdańsk Entrepreneurship Foundation, Pomeranian Loan Fund, the Pomeranian Regional Credit Guarantee Fund, and the city's SCVC INVENO venture capital fund. Not all of these, however, have English-language websites.

As a large city, Gdańsk is also a major academic center, providing a steady stream of well-qualified graduates. Local officials note that staff training programs can be organized through institutions such as the Academy of Medicine in Gdańsk, the University of Gdańsk and the Gdańsk University of Technology.

A raft of major infrastructure investments are underway as well, the highest-profile being a new soccer stadium which will host Euro 2012 championship games. The entire city center is undergoing a revamp as well under the "Młode Miasto" ("Young City") program and renowned architect Daniel Libeskind is designing a huge mixed-use skyscraper. There are also several recreational centers, a new pier, several new academic centers and hotels in the works.

Mayor: Paweł Adamowicz

Area code: 0 58

Area: 262 sq km

Population (Dec 2008): 455,581

Labor force (Dec 2008): 298,928

Unemployment rate (June 2009): 3.5%

Percentage of city covered by zoning plans: 70%

Recent major investors: Acxiom, Fineos, IBM

Key contacts:

Business Service Centre

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Gdynia

While it lacks Sopot's recreational atmosphere and Gdańsk's cosmopolitan mien, Gdynia, the final element of the Tri-city grouping, is where much of the area's business is conducted.

Situated on the Bay of Gdańsk, it is home to Gdynia Shipyard, traditionally one of Poland's most important ports and a large local employer, although it has in recent years entered economic shoals. Nevertheless, the sea is Gdynia's strength. The city's main industries include sea-shipping, port services and international trade. Freight-forwarding firm C. Hartwig Gdynia is headquartered there, for example. Food – especially fish processing – is also an important industry.

Officials are quick to point out, however, that Gdynia's prospects are not limited to sea-related industries. The construction (Allcon, Invest Komfort) and IT (Prokom Investments, Multimedia Polska) sectors have strong presences there as well. The insurance and banking sectors are growing fast, as is tourism, due to the city's location on the water and proximity to Sopot and Gdańsk.

Perhaps the city's greatest advantage is its young, rapidly growing population. According to local authorities, Gdynia is the only Tri-city municipality that can claim a growing population – mostly due to an influx of young people seeking jobs (the city's unemployment rate is a healthy 3.2 percent) and education. The market for goods and services is increasing, as is the need for residences and educational, cultural and recreational facilities. Some 65 percent of the city's population is of working age.

In terms of investment incentives, the Pomeranian Science and Technology Park operates within the city's borders, offering access to data and a knowledge base, as well as training sessions, workshops and conferences. Investors can also seek advice on issues such as intellectual property, technology commercialization, strategic planning and financing.

The Gdynia Business Support Center is also a useful resource. It helps businesses arrange all the formalities connected with getting started, and provides information and advisory services.

Zoning plans cover 21 percent of the city, with a further 10 percent to be zoned soon. The city is investing in rebuilding and modernizing many of its roads, while the biggest recent private investment is Invest Komfort's Sea Towers residential complex, consisting of two ultra-modern glass buildings of 28 and 36 storeys.

Mayor: Wojciech Szczurek

Area code: 0 58

Area: 135 sq km

Population (Dec 2008): 249,257

Labor force (Dec 2008): 162,679



Unemployment rate (June 2009): 3.1%

Percentage of city covered by zoning plans: 21%

Recent major investors: Invest Komfort

Key contacts:

Gdynia City Hall

Investment Department

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Stupsk	97,331	43 sq km
Tczew	60,119	22 sq km
Starogard Gdański	48,813	25 sq km
Wejherowo	46,579	25 sq km
Rumia	45,095	30 sq km



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SILESIA

KEY FACTS

Voivode: Zygmunt Łukaszczyk

Marshall: Bogusław Śmigielski

Area: 12,334 sq km

Population (Dec 2008): 4,662,302

Labor force (Dec 2008): 3,051,575

Unemployment rate (June 2009): 8.3%

Average monthly wage (2008): zł.3,346.78

GDP (2006): zł.137.96 billion (13% of national GDP)

Natural resources: coal, iron, lead

Number of students in higher education (2007): 187,877

Number of institutions of higher education: 44

Major universities: Academy of Fine Arts in Katowice, Academy of Physical Education in Katowice, Częstochowa University of Technology, Medical University of Silesia, Silesian University, Silesian University of Technology in Gliwice

Major airport: Katowice International Airport in Pyrzowice

Special Economic Zone:

Katowice Special Economic Zone: 1,352 ha

ESTIMATED INVESTMENT

Total (2007): zł.16.9 billion

(private sector: zł.11.6 billion; public sector: zł.5.3 billion)

Of which:

Industry: zł.11.7 billion, of which:

manufacturing: zł.7.9 billion

mining and quarrying: zł.1.75 billion

Trade and repair: zł.1.76 billion

Transportation, storage and communication: zł.864.4 million

Construction: zł.523 million

Agriculture: zł.50.5 million

Recent major investors: Caterpillar, Duda-Bis, Fiat, GM, Hörmann, Metro Group, Panattoni Europe, ProLogis

Sources of major foreign investment: Germany, Israel, Italy, the US

VOIVODSHIP BUDGET

2008:

Revenues: zł.1.77 billion

Expenditures: zł.2.09 billion

Deficit: zł.320 million

2009 (projected):

Revenues: zł.2.47 billion

Expenditures: zł.2.91 billion

Deficit: zł.440 million



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Silesian

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➤ SILESIA VOIVODSHIP

Silesia, one of Poland's wealthiest voivodships, has for decades been synonymous with coal mining and pollution. But while its industrial heritage remains key to Silesia's identity, recent attempts to brand it as a land of positive energy and business opportunities have had a visible effect.



The voivodship remains rich in natural resources such as coal, copper and zinc, but it has seen a spate of investments by large multinationals over the past few years. Unilever and Skanska, to name just two, have offices in Katowice, the regional capital. And several regional cities have already attracted a number of R&D investments, helping to undermine the stereotype of the coal-dominated economy. Investments such have these – as well as the prospect of

privatizations of state-owned companies – have, in turn, attracted firms such as Deloitte, KPMG, PricewaterhouseCoopers and Capgemini.

Indeed, the region concentrates some of the biggest firms operating in Poland. *Polityka's* 2008 ranking (published in mid-2009) of the 500 largest firms in the Polish industry, trade and service sectors, listed around 48 corporations seated in Silesia, including energy group Tauron (ninth), coal miner Kompania Węglowa (11th) and auto firm Fiat GM Powertrain Polska (41st).

Local officials stress the value of the voivodship's large, skilled labor force and many educational institutions for potential employers. Unemployment levels which are typically below the national average, however, could theoretically complicate the hiring of workers.

Finally, it's clear that the region as a whole has profited from the strength of its transport infrastructure, which includes the intersection of the (still under construction) A1 and A4 motorways, an international airport and a complex road and rail network. After the completion of the Drogowa Trasa Średnicowa (a motorway which will link the major cities of the region) and the extension of the A1 in 2012, Silesia will host some of the most modern roads in Poland.



➤ MAJOR CITIES

Katowice

Like its voivodship, Katowice has long been associated with heavy industry – coal and steel production, in particular. It has also earned, perhaps undeservedly, a reputation as a relatively unattractive place to live.



Things are changing, though. Katowice has, like its voivodship, begun to shake off old stereotypes, clean itself up and develop new industries. Nowhere is Katowice's intention to shrug off the past more apparent than in the city center. The local authorities are engaged in a long-term, multi-stage project which is descriptively called the "Transformation of the Katowice City Centre." The end result of this plan will literally change the

face of the city's downtown area, although work on this massive undertaking remains in the early stages.

In terms of industry, the city has branched out to become one of the biggest hubs for business and trade fairs in the country, hosting many events at two large convention centers, Spodek and MTK International Katowice Fair. Local authorities are also courting IT and other tech investments.

Forming the heart of Poland's largest urban sprawl, the city has several million people living within its shadow, providing a vast

labor pool to draw on. Moreover, it is home to a considerable number of institutions of higher education, including the University of Silesia and the University of Economics in Katowice.

Interestingly, employees in Silesia's capital also enjoyed the highest average salary among Polish cities in H1 2008 – zł.4,222. By comparison, the next highest city was Warsaw, where the average was zł.4,135.

Mayor: Piotr Uszok

Area code: 0 32

Area: 164.5 sq km

Population (Dec 2008): 312,201

Labor force (Dec 2008): 208,840

Unemployment rate (June 2009): 2.5%

Percentage of city covered by zoning plans: 37.3 percent (figure excludes parkland and wooded areas)

Recent major investors: Geant, Mentor Graphics, Rockwell Automation, TriGranit

Key contacts:

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Częstochowa

The second-largest city in the region, Częstochowa, is renowned for the Jasna Góra monastery and shrine, home of the Black Madonna, a relic which, according to the city, attracts almost five million pilgrims a year. These annual visitors contribute greatly to the local economy.

In addition to spiritual solace, the city offers low labor costs, highly skilled employees and a variety of opportunities for investment. Częstochowa has been distinguished several times by *Forbes* as a place attractive for both business and FDI. Over 50 percent of its population is estimated to have at least a secondary school education, and a number of institutions of higher education service growing demand for employees with advanced degrees.

The municipal authorities stress their city's strong craftsman traditions, noting the presence of tens of thousands of single-person businesses. Local metal treatment workers, machine operators and industrial workers are touted as both especially skilled and experienced.

Częstochowa is also home to a number of well-known sports teams, such as the AZS Częstochowa volleyball team and motorcycle speedway team CKM Włókniarz Częstochowa.

Name of Mayor: Tadeusz Wrona

Area code: 0 32

Area: 160 sq km

Population (Dec 2008): 242,300

Labor force (Dec 2008): 159,433

Unemployment rate (June 2009): 9.1%

Percentage of city covered by zoning plans: about 20%

Recent major investors: Fortum, Globe Trade Centre, Polimeni International, Stölzle Glass, TRW Automotive

Key contacts:

Investor Assistance Center

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Gliwice

Gliwice, the fourth-biggest municipality in Silesia, is among the top 20 cities in Poland in terms of both area and population. It also hosts a number institutions of higher learning, including the Silesian University of Technology, one of the country's largest technical universities.

The city's authorities describe local and regional infrastructure as among Gliwice's strongest advantages. Ongoing projects include the construction of new cycling paths as well as road repair and highway construction schemes.

Investment in the city has come from various sectors. For example, it hosts a GM Opel factory considered to one of the best plants within the conglomerate despite the financial troubles experienced by its mother company. Adhesives producer Mapei Polska has also sited a plant in the city. Local authorities also offer investment incentives including property and income tax breaks, special investment plots and local governmental assistance in establishing an enterprise.

Cultural events are popular in Gliwice, with annual events such as Jazz in the Ruins and the Uliczny International Street Artist Festival. And, with many green, recreational areas and kilometers of bicycle paths, it is also playing a part in deconstructing "common wisdom" about Silesia.

Mayor: Zygmunt Frankiewicz

Area code: 0 32

Area: 134 sq km

Population (Dec 2008): 197,393

Labor force (Dec 2008): 131,863

Unemployment rate (June 2009): 5.8%

Percentage of city covered by zoning plans: 62.5%

Recent major investors: Kirchhoff Polska, Saint-Gobain Isover, TRW Braking Systems

Key contacts:

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Sosnowiec	221,259	91 sq km
Zabrze	188,401	80 sq km
Bytom	183,829	69 sq km
Bielsko-Biała	175,677	125 sq km
Ruda Śląska	143,930	78 sq km



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ŚWIĘTOKRZYSKIE

KEY FACTS

Voivode: Bożentyna Pałka-Koruba

Marshall: Adam Jarubas

Area: 11,710 sq km

Population (Dec 2008): 1,272,784

Labor force (Dec 2008): 806,450

Unemployment rate (June 2009): 14%

Average monthly wage (2008): zł.2,823.29

GDP (2006): zł.27,1 billion
(2.6% of national GDP)

Natural resources: mineral waters, natural building stone, sulfur

Number of students in higher education (2007): 56,690

Number of institutions of higher education: 15

Major universities: the Jan Kochanowski University of Humanities and Sciences, the Kielce University of Technology

Major airports: None

Special Economic Zones:

“Starachowice” Special Economic Zone: 415.91 ha

Tarnobrzeg Special Economic Zone “EURO-PARK WISŁOSAN”: 100 ha



ESTIMATED INVESTMENT

Total (2007): zł.4.11 billion

(private sector: zł.2.86 billion; public sector: zł.1.24 billion)

Of which:

Industry: zł.1.65 billion, of which:

manufacturing: zł.1.29 billion

Real estate, renting and business activities: zł.536.7 million

Construction: zł.441.6 million

Trade and repair: zł.409.8 million

Transport, storage and communication: zł.253.6 million

Recent major investors: Beneparts, DS Smith, Lafarge, Lhoist Group, NSK Europe Limited, RR Donnelley, SABMiller, Schmidt Holding Europe

Sources of major foreign investment: Belgium, France, Germany, Italy, Japan, the UK, the US

VOIVODSHIP BUDGET

2008:

Revenues: zł.234.8 million

Expenditures: zł.245.4 million

Deficit: zł.10.6 million

2009 (projected):

Revenues: zł.322.8 million

Expenditures: zł.322.8 million

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ŚWIĘTOKRZYSKIE VOIVODSHIP

One of Poland's smallest voivodships, Świętokrzyskie is also one of the least-known to foreigners and least populated – its capital, Kielce, is just Poland's 16th largest city. But Świętokrzyskie (Holy Cross) voivodship has plenty of pleasant surprises for potential investors.

One might say the voivodship is literally building a better future. Its significant lime deposits, the largest in the country, have made Świętokrzyskie a building-materials and construction powerhouse. One third of the country's cement production occurs in the voivodship.

Much of that output stays within the region, going towards the construction and modernization of roads. Voivodship authorities – who admit that transportation infrastructure is a weak point – have embarked on an ambitious infrastructure program to better Świętokrzyskie's connections with the rest of the country. This involves not just roads, but rail-line improvement as well. Headline investments include the modernization of express road 74 through Kielce and the construction of two bridges across the Vistula River, at Polaniec and Nowy Korczyn. A new regional airport is also being built in Kielce.

Aiding in all this investment is a flood of EU funding. Investors in road construction would do well to consider that the voivodship has

some €726 million at its disposal for such projects. Under the Operational Program for the Development of Eastern Poland, another €358 million could be added to Świętokrzyskie's funding flow.

Other important industries in the region include paper production, printing, glass-making, metallurgy and farming – Świętokrzyskie is well-known for its delicious fruits and vegetables, which authorities call the "symbol" of the voivodship.

As with Poland's other rural voivodships, tourism is an important industry. But while its one national park and nine scenic parks attract nature lovers from all over Poland and Europe, many are also drawn to Świętokrzyskie's spas, including the mineral springs at Busko Zdrój and Solec Zdrój. Historical tourism also has great potential, with intriguing sites in the region such as Jaskinia Raj (Paradise Cave), which contains evidence of human occupation dating back 50,000 years.

Human capital is another strong point, with around 60,000 students in the area and labor costs a fraction of the national average. The region's location is advantageous as well. Świętokrzyskie lies within a reasonable traveling distance of the cities of Warsaw, Katowice, Kraków and Łódź. It is also within reach of international markets, via Slovakia and Ukraine.



MAJOR CITIES

Kielce

Kielce, Świętokrzyskie's capital and by far its largest city, shares many of its advantages and top industries with its voivodship. The city boasts large deposits of limestone and gypsum, and thus building materials and construction have become key industries, with the city boasting sector investment from large foreign firms all the way down to small sub-suppliers.

Infrastructure investment is being carried out in the city on a huge scale, including a zł.28 million regional airport, a zł.19.5 million, multi-storey parking structure in the center of the city, zł.34 million in road infrastructure improvements and zł.78 million being spent on revitalization of the city's historic center.

Trade fairs have become a huge part of the city's economy. Over the past 15 years Kielce has steadily risen up the trade fair ranks, to the point where Targi Kielce (Kielce Trade Fairs) is now the second-largest trade-fair firm in the country. EU funds will make the sector even stronger – they are being used to expand the Targi Kielce exhibition center, already one of the largest in Poland.

Apart from the aforementioned industries, the city wants to encourage investment in the business process outsourcing sector. A city labor office, established this year, is at the disposal of investors looking to find highly qualified staff.

City authorities emphasize that they are willing to go the extra mile for investors that create jobs, taking on transportation and communication infrastructure improvements at plots where these centers will be built.

That help will likely be needed, as one of the city's drawbacks is that a meager percentage of its non-forested area is covered by zoning

plans – meaning there's the potential that unnecessary bureaucracy could complicate construction projects. However, local officials assure that the zoned area of the city will expand in the near future.

Mayor: Wojciech Lubawski

Area code: 0 41

Area: 110 sq km

Population (Dec 2008): 205,094

Labor force (Dec 2008): 137,937

Unemployment rate (June 2009): 10.2%

Percentage of city covered by zoning plans: 9.6%

Recent major investors: Apollo-Rida Poland, Grupa Orbis, Hossa

Key contacts:

Investor Assistance Centre

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Ostrowiec Świętokrzyski	73,111	46 sq km
Starachowice	52,614	32 sq km
Skarżysko-Kamienna	48,500	64 sq km
Sandomierz	24,795	29 sq km
Końskie	20,465	18 sq km



WARMIŃSKO-MAZURSKIE



KEY FACTS

Voivode: Marian Podziewski

Marshall: Jacek Protas

Area: 241,731 sq km

Population (Dec 2008): 1,427,073

Labor force (Dec 2008): 927,904

Unemployment rate (June 2008): 17.8%

Average monthly wage (2008): zł.2,691.80

GDP (2006): zł.29.97 billion
(2.8% of national GDP)

Natural resources: natural aggregates, quartz sand

Number of students in higher education (2007): 16,777

Number of institutions of higher education: 16

Major universities: University of Warmia and Mazury in Olsztyn

Major airports: None

Special Economic Zones:

Suwałki Special Economic Zone: 162 ha

Warmia-Mazury Special Economic Zone: 589 ha



ESTIMATED INVESTMENT

Total (2007): zł.5.37 billion

(private sector: zł.3.47 billion; public sector: zł.1.90 billion)

Of which:

Industry: zł.1.93 billion, of which:

manufacturing: zł.1.59 billion

Construction: zł.832.7 million

Real estate, renting and business activities: zł.800.3 million

Transport, storage and communication: zł.326.7 million

Trade and repair: zł.322.2 million

Recent major investors: Heinz Glas Działdowo, Michelin Polska, Philips Lighting Poland, Swedwood Poland

Sources of major foreign investment: France, Germany, Sweden, the Netherlands

VOIVODSHIP BUDGET

2008:

Revenues: zł.634.85 million

Expenditures: zł.656.57 million

Deficit: zł.21.72 million

2009 (projected):

Revenues: zł.851.70 million

Expenditures: zł.918.78 million

Deficit: zł.67.08 million

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WARMIŃSKO-MAZURSKIE

Warmińsko-Mazurskie voivodship is blessed with a wealth of natural gifts, perhaps the most famous of which is the Masurian Lake District with its thousands of lakes. Though it has drawn sailors and anglers for centuries, in 2009 the area attracted international attention by making it into the finals of the New7Wonders of Nature campaign.



Indeed, voivodship authorities tout the region's unadulterated beauty as its greatest advantage, noting that tourism is a market with strong investment potential. Nearly the whole voivodship belongs to the "Green Lungs of Poland" (Zielone Płuca Polski), an area described as the country's most pristine.

Tourism infrastructure is relatively well-developed in the voivodship, with over 37,000 hotels, hostels and other forms of accommodation. The thousands of miles of lakes and rivers lure large numbers of sailors, canoers and kayakers annually, and windsurfing has also taken off in recent years. In order to accommodate these visitors, equipment rental operators and other recreation-oriented businesses have sprung up throughout the region. Equestrian facilities are also

found throughout Warmińsko-Mazurskie and extreme sports are growing in popularity.

Warmińsko-Mazurskie's natural gifts extend to the farming and timber industries, which offer strong opportunities for investment. The voivodship boasts some 475,723 ha of forest, making it ideal for businesses whose products are wood-based. Agricultural land comprises over 50 percent of the region and there is a long tradition of agriculture in the area, although private citizens own the majority of farms. Grain and potato cultivation are both particularly common, as is breeding of poultry, swine, cattle and horses.

In terms of investment incentives, Warmińsko-Mazurskie benefits from two special economic zones (the Warmia-Mazury and Suwałki SEZs). Small and medium-sized enterprises are supported through the Warmińsko-Mazurskie Regional Development Agency in the regional capital of Olsztyn, which also aids investors through its Investor Service Center.

In terms of location and infrastructure, Warmińsko-Mazurskie offers a number of advantages. It has a direct link to Eastern markets through its northern border with Russia's Kaliningrad Oblast. It also lies in close proximity to the future A1 motorway and the Via Baltica, which runs from the Czech Republic through Poland and the Baltic states to Finland. The voivodship has recently invested in the rebuilding of national road no. 16 and is constructing a civil airport in Szymany.

Olsztyn | open waters for investment



Olsztyn is the capital city of Warmia and Mazury Region, with over 174 000 inhabitants.

Olsztyn is a gate to the Masurian Lake District - a popular holiday destination attracting tourists from Poland and abroad. Olsztyn's geographical vicinity to Kaliningrad gives the city a special relation with the Russian Federation.

READY FOR INVESTMENT

Olsztyn is a leader in urban planning. The urban spatial development plan comprises areas for industrial and commercial activities as well as residential, recreational and tourist areas.

The Municipality of Olsztyn

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www.olsztyn.eu

MAJOR CITIES

Olsztyn

Despite its rural circumstances, Olsztyn, the voivodship's capital and largest city, is a well-developed center of industry and education. The city is refreshingly well-zoned, with 50 percent of its area covered by spatial development plans. It also enjoys a relatively low unemployment rate, a fact at odds with its voivodship, which suffers the highest unemployment rate in Poland. In addition, GDP per capita is about 15 percent lower than the national average, so investors can be assured of low labor costs.

Several industries have strong presences in the city, including tire production and furniture manufacturing, as well as chemicals, metals, building materials, printing and food processing – especially meat and milk. Olsztyńskie Kopalnie Surowców Mineralnych (Olsztyn Mineral Raw Material Mines, OKSM), the leading producer of mineral aggregates in Poland, also plays a major role in the city's economy.

Local officials are looking to the future, aiming to develop the biotech, IT, renewable energy and BPO industries – sectors which can count on a supply of locally educated graduates. There are several highly regarded institutions of higher education in the city, including the University of Warmia and Mazury in Olsztyn, the School of Computer Science and Economics in Olsztyn, and the Olsztyn Academy of Computer Science and Management.

One significant drawback, according to city officials, is that the city currently has no system of investment incentives. Still, subzones of two SEZs are located in close proximity. Major public infrastructure projects include a large-scale waste-water program for the city and the development of a Water Sports and Recreation Center.

Mayor: Piotr Grzymowicz

Area code: 0 89

Area: 88 sq km

Population (Dec 2008): 176,142

Labor force (Dec 2008): 119,642

Unemployment rate (June 2009): 5.6%

Percentage of city covered by zoning plans: 50%

Recent major investors: JWK Group



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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Elbląg	126,710	80 sq km
Ełk	56,698	21 sq km
Ostróda	33,262	14 sq km
Ława	32,325	22 sq km
Giżycko	29,508	14 sq km



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WIELKOPOLSKIE

KEY FACTS

Voivode: Piotr Florek

Marshall: Marek Woźniak

Area: 29,826.51 sq km

Population (Dec 2008): 3,397,617

Labor force (Dec 2008): 2,207,039

Unemployment rate (June 2009): 8%

Average monthly wage (2008): zł.2,976.33

GDP (2006): zł.98.8 billion
(9.3% of national GDP)

Natural resources: black coal, natural gas, oil, peat, salt

Number of students of higher education (2008): 182,112

Number of institutions in higher education: 38

Major universities: Adam Mickiewicz University in Poznań, Poznań University of Economics, Poznań University of Life Sciences, Poznań University of Technology, Poznań University of Medical Sciences

Major airport: Poznań International Airport in Ławica

Special Economic Zones:

Kamienna Góra Special Economic Zone for Medium Business: 22 ha

Kostrzyn-Słubice Special Economic Zone: 213 ha

Łódź Special Economic Zone: 117 ha

Słupsk Special Economic Zone: 10 ha

Wałbrzych Special Economic Zone "INVEST-PARK": 148 ha

ESTIMATED INVESTMENT

Total (2007): zł.16.5 billion

(private sector: zł.11.93 billion; public sector: zł.4.57 billion)

Of which:

Industry: zł.6.26 billion, of which:

manufacturing: zł.4.75 billion

Real estate, renting and business activities: zł.2.8 billion

Trade and repair: zł.1.81 billion

Construction: zł.1.34 billion

Electricity, gas and water supply: zł.1.31 billion

Recent major investors: Allied Irish Bank, Beiersdorf, GlaxoSmithKline, Nestlé, Philips, Wrigley

Sources of major foreign investment: Germany, Ireland, the UK, the US

VOIVODSHIP BUDGET

2008:

Revenues: zł.1.38 billion

Expenditures: zł.1.51 billion

Deficit: zł.126 million

2009 (projected):

Revenues: zł.1.42 billion

Expenditures: zł.1.74 billion

Deficit: zł.320 million



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WIELKOPOLSKIE VOIVODSHIP

Wielkopolskie is the second-largest voivodship in Poland in terms of area, and third-largest in terms of population. It is situated in the central-western part of the country, abutting a record seven other voivodships.

Because of its sprawling, central location and its connections to other regions, Wielkopolskie is an important base of operations for many firms serving the domestic market. As host to a large, already completed swathe of the east-west A2 motorway, as well as a latticework of national roads, the voivodship is also a vital transport corridor.

While Wielkopolskie plays a large role in domestic economic matters, it is also one of Poland's largest exporters. The region's most important products, in terms of export value, include automotive vehicles and parts, furniture, lighting equipment and pharmaceuticals.

According to local authorities, small and medium enterprises have been a driving force in the voivodship's socio-economic development. At the end of 2007, there were over 352,000 firms registered in the voivodship, of which only 382 had more than 250 employees, and these figures have seen regular y/y growth. The economic

crisis has undoubtedly had an impact on these firms, although representatives of the voivodship note that around 100 institutions support the development of entrepreneurship in the region.

The influence of foreign capital among both SMEs and larger firms is also emphasized. There are over 5,000 business in Wielkopolskie which boast foreign capital, in sectors such as foodstuffs, chemicals, pharmaceuticals, transport and machinery manufacturing.

When it comes to culture, Poznań, the voivodship's largest city, naturally has the most influence. However, other areas of Wielkopolskie are also known for hosting significant events. Kalisz, for instance, has held the Kaliskie Spotkania Teatralne festival for almost 50 years; it is also home to the annual "La Strada" Street Art Festival and the International Festival of Jazz Pianists. Gniezno, meanwhile, has the International "pod Piątką" Jazz Festival.

Tourism is an area in which voivodship authorities see much room for development. Motor and cycling tourism are popular in the region and it is noteworthy for having over 1,000 km of bike trails in its Wielkopolskie Cycling Trail System.



MAJOR CITIES

Poznań

Poznań, the capital of the Wielkopolskie voivodship and Poland's fifth-largest city in terms of population, enjoys a reputation as a good place to do business. To capitalize on this, the city launched a promotional campaign in 2009, presenting itself as a modern, lively city "with know-how."



For years Poznań has been a byword for trade and exhibition events, thanks in large part to the presence of Poznań International Fair, one of the biggest event organizers in the CEE region. Moreover, the Gdańsk Institute for Market Economics regularly names the city one Poland's most attractive destinations for investment.

Firms from a number of different industries have taken note. Volkswagen, MAN and Bridgestone are a few investors from the automotive industry, while domestic and international retail chains such as Żabka, Billa, Jeronimo Martins, Bricomarche, Lidl, Selgros, Eurocash and Piotr i Paweł are seated in the city.

The city is home to three major players in the Polish jewelry market – W. Kruk, Yes and Apart. Kompania Piwowarska, leader on the domestic brewing market, is also headquartered in Poznań.

Poznań City Hall has been lauded as a model for managing investor relations. For one, Poland's Urban Land Institute in a 2009 report distinguished Poznań as a city which actively attracts businesses. The city also led daily *Rzeczpospolita*'s ranking of municipal governments in 2009, retaining its top spot from 2008.

Culturally, Poznań is renowned for the Malta International Theatre Festival and the Henryk Wieniawski International Violin Competition, among other events. The city will also host matches during the Euro 2012 soccer tournament, for which the local stadium is being renovated and expanded.

Mayor: Ryszard Grobelny

Area code: 0 61

Area: 261.85 sq km

Population (Dec 2008): 557,264

Labor force (Dec 2008): 370,658

Unemployment rate (June 2009): 2.3%

Percentage of city covered by zoning plans: 25.93%

Recent major investors: Lorenz Snack-World Services, Möbel Walther, Neinver, Open Text, Roche, Telcordia Technologies, Unilever, Wizz Air

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Kalisz	107,140	69.77 sq km
Konin	79,829	81.68 sq km
Piła	74,735	102.71 sq km
Ostrów Wielkopolski	72,368	42.39 sq km
Gniezno	69,737	40.89 sq km



ZACHODNIOPOMORSKIE



KEY FACTS

Voivode: Marcin Zydorowicz

Marshall: Władysław Husejko

Area: 22,902 sq km

Population (Dec 2008): 1,692,957

Labor force (Dec 2008): 323,549

Unemployment rate (June 2009): 14.2%

Average monthly wage (2008): zł.3,080.38

GDP (2006): zł.42.88 billion (4% of national GDP)

Natural resources: approximately 3,000 lakes, beaches, biomass, clay, forests, geothermal, good conditions for renewable energies (wind, hydro), natural gas, oil, peat, sand

Number of students of higher education (2008): 80,104

Number of institutions in higher education: 22

Major universities: Koszalin University of Technology, Maritime University of Szczecin, Pomeranian Medical University, the West Pomeranian Business School, the West Pomeranian University of Technology, University of Szczecin

Major airport: Szczecin-Goleniów Airport

Special Economic Zones:

Kostrzyn-Słubice Special Economic Zone: 238.41 ha

Pomeranian Special Economic Zone: 150 ha

Słupsk Special Economic Zone: 212.4 ha



ESTIMATED INVESTMENT

Total (2007): zł.6.94 billion

(private sector: zł.4.08 billion; public sector: zł.2.86 billion)

Of which:

Industry: zł.2.48 billion, of which:

manufacturing: zł.1.38 billion

Real estate, renting and business activities: zł.1.05 billion

Electricity, gas and water supply: zł.1.04 billion

Construction: zł.718 million

Trade and repair: zł.640 million

Transportation, storage and communication: zł.419 million

Recent major investors: Bridgestone Poland, ECE Projectmanagement Polska, HG Poland, UniCredit, Van Heyghen Staal

Sources of major foreign investment: Austria, Belgium, Denmark, Germany, Sweden, the Netherlands, the UK

VOIVODSHIP BUDGET

2008:

Revenues: zł.541.06 million

Expenditures: zł.536.04 million

Surplus: zł.5.02 million

2009 (projected):

Revenues: zł.760.28 million

Expenditures: zł.844.74 million

Deficit: zł.84.45 million

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ZACHODNIOPOMORSKIE VOIVODSHIP

Poland's westernmost voivodship, Zachodniopomorskie, occupies a privileged position in the country. By virtue of its proximity to Germany, Scandinavia and Baltic shipping lanes, the voivodship serves as an economic gateway to the world, while at the same time its natural resources serve both industrial and recreational interests.



In total, Zachodniopomorskie comprises around 7.3 percent of Poland's total area and about 4.4 percent of its population. Local authorities stress the quality of the workforce – which is reinforced annually by around 18,000 new graduates of higher education – as well as the fact that labor costs are on par with the national average. The number of capable German speakers in the voivodship is also relatively high.

Zachodniopomorskie is one of only two regions in Poland – the other being Lower Silesia – currently linked to Western Europe by highway. Moreover, it is suffused with road and railway infrastructure, has an international airport and hosts the biggest ferry terminal in the country. Ports in Szczecin and Świnoujście offer access to sea trade.

Representatives of the voivodship stress that a variety of investment options exist. These include the possibility of investing on land sited within one of three special economic zones – the Kostrzyn-Słubice, Pomeranian and Słupsk SEZs – and several large industrial and technology parks, such as the Szczecin Science and Technology Park.

In terms of sectors with strong potential for investment, Zachodniopomorskie's Investor Assistance Center notes tourism, yachting and health and beauty services as attractive options. Renewable energy is another area which is drawing interest, and wind energy in particular, as the blustery coastline has proven suitable for wind turbines.

Not all the news from the voivodship is rosy, though. Unemployment is relatively high – although local authorities suggest that this is to employers' advantage – and not all local industries have coped well with the free market.

Shipbuilding is a case in point. As in neighboring Pomorskie, maritime construction is a traditionally strong industry in Zachodniopomorskie. The industry has been plagued by troubles since the end of communism, but the state's search for private investment in New Szczecin Shipyard, a large local employer, has offered new hope.



MAJOR CITIES

Szczecin

Szczecin, the administrative seat of Zachodniopomorskie voivodship, is Poland's seventh-largest city by population and third-largest in terms of area. It lies around 20 km from the German border and has access to the Baltic Sea, giving the city strong trade and transport links with Western Europe.

In *Rzeczpospolita's* "Local Government Ranking 2009," Szczecin's authorities were ranked eighth out of 50 large Polish cities, with the governments of fellow Zachodniopomorskie cities Świnoujście and Koszalin taking 16th and 27th places, respectively.

In terms of its economy, Szczecin remains largely dependent on the sea, but has managed to diversify its base to a degree, attracting IT investments such as a UniCredit BPO center. Meanwhile, the city itself plans to spend several billion złoty on investment over the next few years, earmarked for projects to improve municipal transport and waste management systems, to better environmental protection programs and to support sport and culture.

Indeed, Szczecin is well-known in Poland for these latter two areas. The capital of Zachodniopomorskie is synonymous with sailing, for example, hosting a number of races and maritime-themed events throughout the year. The annual Days of the Sea festival is one such example. Other major events on the city's calendar include the International Street Artists' Festival, the Szczecin Rock Festival and the Pekao Open tennis tournament.

Mayor: Piotr Krzystek

Area code: 0 91

Area: 301 sq km

Population (Dec 2008): 407,785

Labor force (Dec 2008): 64,622

Unemployment rate (June 2009): 6.3%

Percentage of city covered by zoning plans: 24.81%

Recent major investors: ECE Projectmanagement Polska, Echo Investment, UniCredit

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OTHER MAJOR CITIES

CITY	POPULATION	AREA
Koszalin	107,376	83 sq km
Stargard Szczeciński	70,217	48 sq km
Kołobrzeg	44,889	26 sq km
Świnoujście	40,871	197 sq km
Szczecinek	38,488	37 sq km

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SPECIAL ECONOMIC ZONES IN POLAND

Seventeen special economic zones (SEZs) were conceived in Poland in the mid-1990s as a means of encouraging investment in various areas of the country, of which 15 were opened and 14 remain today. The idea was elegantly simple: create administratively independent zones which work to satisfy the needs of investors and local regions alike.

For the latter group, the business relationships formed through the framework of Poland's SEZs have meant a net increase in entrepreneurship as well as the creation a large number of new jobs.

And for qualifying investors, both foreign and domestic, the incentives offered by investment in a special economic zone have helped to boost competitiveness.

Incentives for investing in an SEZ include corporate or personal income tax exemptions, sites already developed with infrastructure and utilities, as well as the assistance of authorities trained to ease the often complicated task of setting up a new venture in Poland. The regulations regarding investment and the benefits thereof vary according to the investor and the special economic zone, but in all cases the prospective investor needs to apply to



the SEZ's management board for an operating permit.

In general, the minimum value of an investment entitled to public aid in a special economic zone is €100,000. The investor needs to agree with the SEZ authorities on how many jobs will be created through the investment and must later fulfill this agreement. The rules also stipulate that a certain percentage of an investment (generally 25 percent) must come from the investor's own funds, meaning not from public aid.

These are, it should be noted, only general descriptions of the rules governing SEZ investment. Interested parties should consult with the Polish Information and Foreign Investment Agency (www.paiz.gov.pl) or with the zones themselves.

Originally, Poland's SEZs were sanctioned to exist for a period of 20 years, but a 2008 amendment to the regulations extended this and now all 14 zones are scheduled to close on December 31, 2020. In the meantime, they remain attractive and accommodating locations in which to do business.

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➤ EURO-PARK MIELEC Special Economic Zone

The oldest of Poland's special economic zones, EURO-PARK MIELEC has facilitated the creation of over 12,000 jobs since it opened. Representatives of the SEZ emphasize that location is one of its major advantages, particularly for investors interested in CEE markets. EURO-PARK MIELEC's subzones are strewn throughout the southeastern corner of Poland and many are within short distances of Slovakia, Ukraine or Belarus.

Investing assistance is naturally available, including preparation of land for greenfield investments, the option of "turn-key" construction of production facilities and the issuance of building permits on site. The SEZ currently hosts almost 100 firms and local authorities note the potential to draw on suppliers from a wide range of industries.



Year established: 1995

Total area for investment: 998 ha (275 ha available for investment)

Industries the SEZ specializes in: metal working, automotive sector, plastic component production and aviation. IT/services, construction and machinery also present, among other sectors

Top investors in terms of value of investment:

Polskie Zakłady Lotnicze (aviation) – the United States

MTU Aero Engines Polska (aviation) – Germany

Lear Corporation (automotive) – the United States

Firma Oponiarska Dębica (automotive) – Cyprus

Kronospan Mielec (wood processing) – the United States

Total number of investors (July 2009): 99

Total value of investments (July 2009): zł.4.04 billion

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➤ Kamienna Góra Special Economic Zone for Medium Business

Since its inception in 1997, the Kamienna Góra Special Economic Zone for Medium Business has incorporated several hundred hectares of terrain. The zone is primarily located in the Lower Silesia voivodship, with a small presence in the Wielkopolska voivodship.

One of this SEZ's most attractive attributes is its close proximity to the Czech and German borders, with well-developed transportation arteries located throughout the region. The Kamienna Góra Special Economic Zone for Medium Business also counts local mineral deposits, tourism potential, "supportive and investor-friendly local authorities" and a well-educated, low-cost workforce among its assets.



Year established: 1997

Subzones located in: Lower Silesia and Wielkopolskie

Total area for investment: 368.78 ha (161 ha available for investment)

Industries the SEZ specializes in: No specialization, companies from many branches

Total number of investors (July 2009): 41

Total value of investments (July 2009): zł.1.36 billion

Top investors in terms of value of investment:

BDN (printing) – Germany

Takata Petri Parts Polska (automotive) – Japan

POLCOLORIT (ceramics) – Poland

Wepa Professional Piechowice (paper) – Germany/Poland

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Polska (automotive) – Germany

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Katowice Special Economic Zone

According to representatives of the Katowice Special Economic Zone, their zone is the leader among Polish SEZs in terms of the human resource market and labor costs, as well as for “investment attractiveness of the region.” They also cite the “European Cities & Regions of the Future 2008/2009,” published by the *Financial Times*’ investment magazine, *fDi*, which ranked “Southern Poland” seventh in terms of best economic potential and fourth in terms of cost effectiveness.

The SEZ also benefits from two international transportation corridors – one running from Berlin to Lviv, the other from Gdańsk to Žilina – and two major motorways, the A1 and A4.



Year established: 1996

Subzones located in: Silesia, Opolskie and Małopolskie

Total area for investment: 1,544 ha located in 35 different sites. Around 586 ha for future investments. There are also plans to extend the area of the zone to 2,009 ha by the end of 2009.

Silesia voivodship: approximately 1,352 ha

Opolskie voivodship: approximately 170 ha

Małopolskie voivodship: 22 ha

Industries the SEZ specializes in: automotive (60%)

Top investors in terms of value of investment:

GM Opel (automotive) – the United States

Fiat - GM Powertrain Polska (automotive) – Italy

NGK Ceramics (automotive) – Japan

Total number of investors: 180

Total value of investments: over zł.13 billion

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Kostrzyn-Słubice Special Economic Zone

Land in the Kostrzyn-Słubice Special Economic Zone is spread throughout the Lubuskie, Wielkopolskie and Zachodniopomorskie voivodships, with the greatest concentration found in the former. It is, according to SEZ representatives, the zone located closest to Germany, and boasts direct links with Berlin as well as other major European cities.

Furthermore, the SEZ is located in a region where labor and land costs remain low in comparison to other areas of Poland, and investment plots in small and mid-sized towns come well equipped with utilities and technical infrastructure. Regional unemployment is still relatively high, especially in Lubuskie voivodship, so staffing can be less arduous than in other parts of the country.



Year established: 1997

Total area for investment: 1,258.32 ha (707.15 available), likely to be expanded in the future

Industries the SEZ specializes in: Specialization depends on the subzone, but examples include electronics, optics, the automotive industry, chemicals, furniture, machinery and paper

Top investors in terms of value of investment:

ICT Poland (tissue paper) – Italy

Barlinek Inwestycje (wood processing) – Poland

Volkswagen Poznań (automotive) – Germany

TPV Displays Poland (electronics/optics) – Taiwan

Arctic Paper Kostrzyn (wood processing) – Sweden

Total number of investors (July 2009): 174 permits issued

Total value of investments (December 2008):
zł.3.44 billion

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Kraków Technology Park Special Economic Zone

The Kraków Technology Park Special Economic Zone is unique among its peers in that it functions as both SEZ and tech park. It was originally expected to cater exclusively to firms involved in hi-tech fields such as IT, biotech and electronics. However, the zone struggled under this limitation and the decision was later made to invite companies from other industries to invest on its land.

But the SEZ still supports hi-tech firms and its Technology Incubator building, completed in 2008, currently houses the park's authorities. Moreover, one of the Kraków Technology Park's main goals is to foster the development of high technologies and to bring academic and research institutions together with businesses.



Year established: 1997

Total area for investment: 528.84 ha

Industries the SEZ specializes in: all sectors of traditional industry, with the exception of manufacturing that requires state licenses (such as alcoholic beverages, tobacco products, steel production). Other sectors include ICT, research and development in natural and technical sciences, accounting and auditing, bookkeeping and call centers

Top investors in terms of value of investment:

Comarch (IT) – Poland

MAN Trucks (automotive) – Germany

Nidec Motors and Actuators Poland (automotive) – Japan

Motorola Polska Electronics (telecommunications) – the United States

RR Donnelley Europe (printing) – United States

Total number of investors (July 2009): 73

Total value of investments (July 2009): zł.1.29 billion

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Legnica Special Economic Zone

Located exclusively in the Lower Silesia voivodship, the Legnica Special Economic Zone shares that region's distinct advantages, including proximity to the Czech and German borders and extremely well developed road and rail transportation routes. Also, three large airports lie within a reasonable distance of Legnica's 12 subzones.

Land incorporated within the zone has easy road access and a number of greenfield investment plots. According to SEZ representatives, one of their greatest advantages is an "individual investment process and professional investment care."



Year established: 1997

Year of closure: 2020

Total area for investment: 457 ha (140 ha available), expected to be expanded to about 600 ha in the future

Industries the SEZ specializes in: automotive industry, electronics, plastic parts, machinery

Top investors in terms of value of investment:

VW Motor Group (automotive) – Germany

CCC (shoe producer) – Poland

Sanden (automotive) – Japan

Winkelmann (water heaters, metal) – Germany

Viessmann (heating systems) – Germany

Total number of investors (July 2009):

50 (91 permits issued)

Total value of investments (July 2009): zł.4.09 billion

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Łódź Special Economic Zone

In KPMG's 2008 "Special Economic Zones" report, the Łódź Special Economic Zone was rated highest among SEZs in terms of investor assessment, with over 90 percent of its investors giving it "good" or "very good" marks. As well, Colliers' most recent "Improving through Moving" report highlighted the Łódź area's great potential among Polish cities for production outsourcing.

Among its strongest assets, the SEZ can count the immense academic center located in Łódź, with around 120,000 students of higher education and 20,000 graduates annually, as well as its close proximity to the Polish capital and its own international airport. It is also located near the A1 and A2 motorways, as well as the S8 and S14 expressways.



Year established: 1997

Total area for investment: 1,162 ha (350 ha available), expected to grow in the future

Industries the SEZ specializes in: white goods, packaging, pharmaceuticals, plastics, construction materials

Top investors in terms of value of investment:

Dell (IT) – the United States

Procter & Gamble (personal care products) – the United States

Euroglas (construction) – Germany

BSH (white goods) – Germany

Indesit (white goods) – Italy

Total number of investors (July 2009): 145

Total value of investments (July 2009): €2.5 billion

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Pomeranian Special Economic Zone

Born out of a 2001 merger of zones in Żarnowiec and Tczew, the Pomeranian Special Economic Zone is technically the youngest of Poland's SEZs. It is also swiftly developing, with a number of investments currently underway and plans to expand its area in the near future.

The Pomeranian SEZ's subzones are scattered throughout the Pomorskie, Kujawsko-Pomorskie and Zachodniopomorskie voivodships, regions which offer unique investment opportunities such as plots located near container terminals, within the Tri-city area or along the northern stretch of the A1 motorway.

Representatives of the SEZ also stress that proximity to Gdańsk's Lech Wałęsa International Airport and the Gdańsk Science and Technology Park provide additional benefits for investors. Consulting is available at any stage of negotiations, even after the commencement of an investment, and infrastructure for greenfield investments can be provided within half a year.



Year established: 2001

Total area for investment: 1,162 ha (320 ha available), expected to increase in 2009

Industries the SEZ specializes in: electronics, pharmaceuticals, paper; open to most investments, especially BPO services, new technologies and innovative companies

Top investors in terms of value of investment:

Flextronics International Poland (telephone production) – the United States

Bridgestone Stargard (automotive) – Japan

Sharp Manufacturing Poland (LCD panels) – Japan

International Paper Kwidzyn (cellulose and paper) – the United States

Mondi Packaging Paper Świecie (packaging) – the United Kingdom

Total number of investors (July 2009): 62

Total value of investments (July 2009): zł3.7 billion

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Slupsk Special Economic Zone

Land in the Slupsk Special Economic Zone is concentrated in the northwestern voivodships of Poland – Zachodniopomorskie, Pomorskie and Wielkopolskie. This location gives investors good access to the German-Polish border as well as to Baltic shipping lanes.

According to the SEZ's authorities, average construction costs are lower in the region than in other areas of the country and the presence of development plans help to ease the investment process. Also stressed is the friendly, welcoming atmosphere in both the economic zone and the area in general.



Year established: 1997

Total area for investment: 401 ha (178 ha available)

Industries the SEZ specializes in: Plastics processing, transportation and warehousing, and production of metal goods, car windows, canned fish, wood-based materials

Top investors in terms of value of investment:

Kronospan Polska (chipboard and paneling production) – Cyprus

Nordglass II (automotive) – Poland

Przetwórstwo Rybne "ŁOSOŚ" (fish canning) – Poland

Ozen Plus (charcoal and energy production) – Poland

Jakob Hatteland Development (electronics) – Norway

Total number of investors (July 2009): 48

Total value of investments (July 2009): over zł.700 million

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"Starachowice" Special Economic Zone

The "Starachowice" Special Economic Zone is one of the most geographically diverse SEZs in Poland, with subzones located in five voivodships: Świętokrzyskie, Mazowieckie, Opolskie, Łódzkie and Lubelskie. Investors are generally able to apply for the maximum amount of public support available (up to 70 percent of investment costs).

Representatives of the zone stress the "high quality investor service," low costs of employment and locations available in traditional centers of industry as major advantages. As well, according to the 2008 edition of KPMG's "Special Economic Zones" report, "Starachowice" is one of the best SEZs when it comes to the quality of rail links with subzones.



Year established: 1997

Total area for investment: 580.44 ha (approximately 215 ha available)

Industries the SEZ specializes in: Precision mechanics, the automotive industry, metallurgy, electronics, wood-processing, building materials

Top investors in terms of value of investment:

MAN Bus (automotive) – Germany

RR Donnelley Starachowice (printing) – the United States

Fabryka Kotłów SEFAKO (industrial boilers) – Poland

Air Liquide Polska (technical gases) – France

Cersanit II (bathroom furniture) – Poland

Total number of investors (July 2009): 76

Total value of investments (July 2009): zł.1.38 billion

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➤ Suwałki Special Economic Zone

The Suwałki Special Economic Zone inhabits Poland's northeastern corner, making it a location of prime significance for investors interested in eastern markets such as Russia, Lithuania or Belarus. It is the sole SEZ to have a presence in Podlaskie voivodship and it also has subzones in Warmińsko-Mazurskie, Podlaskie and Mazowieckie voivodships.

Among the zone's merits, Suwałki SEZ staff stress the importance of relatively cheap real estate and low labor costs in comparison with western Poland. Unemployment in the region means there is no dearth of workers, while the presence of institutions of higher and vocational education means the local labor force offers a variety of different skills.



Year established: 1996

Total area for investment: 342 ha (112.87 ha available)

Industries the SEZ specializes in: various industries, including plastics, wood-processing and construction materials

Top investors in terms of value of investment:

Pfleiderer MDF (furniture chipboards) – Germany

Rockwool Polska (insulation materials) – Denmark

Porta KMI Poland (doors) – Poland

PP Cezar (tiles and paneling) – Poland

Aquael (aquarium equipment) – Poland

Total number of investors (July 2009): 60

Total value of investments (July 2009): zł.1.39 billion

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➤ Tarnobrzeg Special Economic Zone “EURO-PARK WISŁOSAN”

One of Poland's biggest SEZs, Tarnobrzeg Special Economic Zone “EURO-PARK WISŁOSAN” occupies land in five different voivodships – Podkarpackie, Mazowieckie, Świętokrzyskie, Lubelskie and Lower Silesia – meaning its subzones are located in both the southeast and southwest of the nation. This geographical diversity means investors have a wide range of different environments in which to locate projects.

Among its assets “EURO-PARK WISŁOSAN” counts the nearness of the EU's eastern and western border, sizable tax reductions, low prices, modern facilities and the availability of professional, well-trained staff in most sectors.



Year established: 1997

Total area for investment: 1,336.44 ha (276.2 ha available), expected to be enlarged by 300 ha in the near future

Industries the SEZ specializes in: construction, pharmaceuticals, plastics, metals, electronics and chemicals

Top investors in terms of value of investment:

LG Philips LCD Poland (electronics) – South Korea

ATS Stahlschmidt & Maiworm (automotive) – Germany

Sanfarm (pharmaceuticals) – Poland

LG Electronics Wrocław (electronics) – Poland

Heesung Electronics Poland (electronics) – South Korea

Total number of investors (July 2009): 115 (180 permits issued)

Total value of investments (July 2009): zł.5 billion

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Wałbrzych Special Economic Zone "INVEST-PARK"

The largest of Poland's SEZs in terms of area, the Wałbrzych Special Economic Zone "INVEST-PARK" is also second-biggest in terms of amount of investment and number of jobs created. Subzones are spread throughout four voivodships – Lower Silesia, Opolskie, Lubuskie and Wielkopolskie – all of which boast strong industrial traditions. Land within the SEZ is also located in close proximity to other markets of the European Union.

The authorities of "INVEST-PARK" make note of a number of industrial properties which might be interesting to investors looking for BPO, production or warehouse space.



Year established: 1997

Total area for investment: 1,651.52 ha (over 480 ha available)

Industries the SEZ specializes in: dominant sectors are the automotive industry and white goods production. Others include metal-processing, construction, engineering and plastics production

Top investors in terms of value of investment:

Toyota Motor Manufacturing Poland (automotive) – Japan
 Toyota Motor Industries Poland (automotive) – Japan
 Electrolux Poland (white goods) – Sweden
 Cadbury Polska (food) – the United Kingdom
 Faurecia Wałbrzych (automotive) – France

Total number of investors

(July 2009): 128 (142 permits issued)

Total value of investments (March 2009): zł.9.9 billion

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Warmia-Mazury Special Economic Zone

The Warmia-Mazury Special Economic Zone, whose subzones are situated in the Warmińsko-Mazurskie and Mazowieckie voivodships, stands squarely in the middle among its peers in terms of total area. It was well-rated by its resident firms in KPMG's 2008 "Special Economic Zones" report, with 88.1 percent describing it as "good" or "very good," which put it in third place among SEZs.

Among the zone's merits, its representatives stress low land prices, a wide selection of possibilities in terms of location and low labor costs. The fact that the area sees a relatively low level of competition is also touted.



Year established: 1997

Total area for investment: 738.8 ha (268.1 ha available),
 expected to grow by 45 ha

Industries the SEZ specializes in: manufacturing of furniture, electronics and tires

Top investors in terms of value of investment:

Michelin Polska (automotive) – France
 LG Electronics Mława (TV and monitor production) – South Korea
 Swedwood Poland (furniture and wooden goods) – Sweden
 Wydawnictwo Bauer (publishing) – Germany
 Wójcik Fabryka Mebli (furniture) – Poland

Total number of investors (July 2009): 55

Total value of investments (July 2009): zł.2.53 billion

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INDUSTRIAL AND TECHNOLOGY PARKS

For a business wanting to launch activity in an already-prepared location, perhaps close to suppliers or other firms in its industry, the decision to site in an industrial and/or technology park can be very profitable. Poland hosts many such locations, although they differ greatly in scale, form and function.

The parks listed in this section share a common goal: to support entrepreneurship and innovation. They seek to do this in different ways, for example by providing technical infrastructure, creating links between academia and business and, ultimately, by helping to transfer innovative solutions from the realm of the extraordinary to that of everyday use.

It should be noted that not all technology or hybrid tech-industrial parks meet the stringent criteria established by the Polish Business and Innovation Centers Association (SOOliP). According to the organization, only seven parks meet all the requirements expected of technology parks, while most others fulfill some but not all of the criteria. Another 20 or so parks are in the pipeline.

Among active tech parks, the biggest park in terms of area is the Industry and Technology Park Bełchatów Kleszczów, while the

Wrocław Technology Park hosts the most firms and greatest amount of capital. The oldest is the Poznań Science and Technology Park, founded in 1995.

According to SOOliP, the regions of Poland which host industrial and technology parks have seen visible improvement in the development of local entrepreneurship. The concept has, however, become something of a victim of its own success. In some areas, too many “park” initiatives have been launched with too little forethought. Even in regions possessing the appropriate scientific-economic conditions to foster several initiatives simultaneously, poor planning has led to the recent liquidation of some parks.

As such, please note that the list of industrial and technology parks which follows is neither exhaustive nor static. New initiatives are constantly being put forward, other plans are being moth-balled or abandoned. Many parks are thriving, while others have gone by the wayside. All of the parks listed were contacted and were engaged in business activity at the time *Investing in Poland 2010* was published.



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Bukowice Industrial Park

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Industrial Park in Stargard

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Industry and Technology Park Bełchatów Kleszczów

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Jaworzno Industrial Park

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Kutno Agro-Industrial Park

Kutno Town Hall

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Lower Silesian Technology Park “T-Park”

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Mielec Industrial Park

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Opole Science and Technology Park

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Podkarpackie Science-Technology Park

Rzeszów Regional Development Agency (RARR)

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The American Chamber of Commerce in Poland (AmCham) is a leading business organization that strives to serve and promote its member companies as an important voice of business in Poland; to foster a positive relationship with the government; and

to promote the free market spirit for the benefit of the Polish business environment.

AmCham achieves its goals through a number of activities, including Monthly Meetings and Business Mixers. At present there are 18 committees that represent all aspects of the economy, from agriculture and food to IT, outsourcing, taxation and real estate. And to promote its values and know-how AmCham runs its own monthly magazine, *American Investor*.

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 @ office@amcham.com.pl



The German-Polish Chamber of Industry and Commerce (AHK Poland) is the largest

bilateral organization of economic self-governance in Poland and one of the most influential German chambers of industry and commerce (AHK) in the world. It represents around 1,000 member companies and has been working to develop German-Polish relations for almost 15 years. The organization's offer includes professional consulting for German and Polish companies, facilitation of contacts between them and finding of trustworthy business partners, as well as market analysis and help in setting up new companies abroad.

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The Polish Information and Foreign Investment Agency (PAIIZ) has been servicing investors for 16 years. Its mission is to create a positive image of Poland in the world and increase the inflow of foreign direct investment by encouraging international companies to invest in Poland.

The Agency offers foreign entrepreneurs: quick access to information regarding economic and legal investment environment; assistance in finding a convenient investment location; help in obtaining investment incentives; guidance through all the necessary administrative and legal procedures; advice in each phase of the investment process.

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The British Polish Chamber of Commerce (BPCC) is an independent, non-for-profit organization which assists in the development of British-Polish business links. The current membership represents the broadest range of industrial and commercial sector. The BPCC holds around 75 events annually and partners in over 200 across the UK and Polish regions. The BPCC has established Policy Groups to promote best business practice – often transferring knowledge and experience from the UK – and to encourage structural and regulatory reforms in Poland. The BPCC has promoted business, trade and cultural relations between Poland and the UK since 1992.

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The Netherlands-Polish Chamber of Commerce's mission is to promote business contacts between our members and between the Netherlands and Poland through events, networking meetings, our magazine, *Bulletin*, and our website. The chamber's main activities are monthly business drinks, educational services, business breakfasts and lunches and regular meetings with ministers and senior government officials. An interest in the Netherlands is all that is required to join.

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Scandinavian-Polish Chamber of Commerce (SPCC)

is one of the biggest bilateral chambers in Poland. It was established in 2004 as a merger of Danish-Polish Chamber of Commerce, Finnish Trade Guild, Swedish Business Club and Norwegian Business Forum. The main office is located in Warsaw, and Regional Representatives are present in Cracow, Poznań, Wrocław, Szczecin and Tri-city. At the moment SPCC has 330 members. SPCC organizes a wide range of meetings for members, such as networking business mixers, seminars, conferences and breakfast meetings with renowned personalities from the political and economic world.

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