



Dolnośląskie (Lower Silesia)

Total area of the voivodship	19 947 km ²
Number of citizens: - in urban areas	2903,71 thousand. 68,95%
Population per 1 km ²	146 persons per km ²
Principal city	Wrocław
Bigger cities in the voivodship	Wałbrzych, Legnica, Jelenia Góra, Świdnica, Bolesławiec, Dzierżoniów
Special Economic Zones	Legnica SEZ Wałbrzych SEZ Kamienna Góra SEZ Tarnobrzaska SEZ
Industrial & Technology Parks	Lower Silesian Technology Park „T-Park” Nowa Ruda Industrial Park Bukowice Industrial Park Wrocław Industrial Park Bielawa Industrial Park Industrial Park in Wałbrzych KGHM LETIA Legnica Technology Park Wrocław Medical Science and Technology Park Data Techno Park sp. z o.o. Wrocław Technology Park Lower Silesian Innovation and Science Park Business Engine of Wrocław Technology Park ChemiPark Technology
Regional Investor Support Centre	Wrocław
International airport	<u>Wrocław - Strachowice</u>

Lower Silesia is situated at the south-western part of Poland and border with Germany and Czech Republic. It's the most urbanized region in Poland. The majority companies have foreign capital. The basis of lower silesian economic development are its natural resources and perfect communication with Western Europe within high educational level, administration and region promotion. Dynamic regional development attracts young people from other regions. Electric machinery, high-tech motorisation, IT services and BPO sectors are highly developed sectors.

Voivodship advantages

- location at the European transport corridor, location close to the Czech Republic and Germany, close to the cities of Prague, Berlin and Warsaw
- well-developed transport infrastructure (road, rail, water and airport) and also informatics.

- favourable voivodship location due to main routes: motorway A4, international routes: E30 - connecting Germany with Ukraine and E59, connecting ports in Szczecin- Świnoujście with southern Europe, Wrocław - the largest railway junction in Poland servicing passengers and cargos.

- international Airport: connections with Frankfurt, Munich, London, Copenhagen, Vienne, Berlin, Milan, Dublin, Dortmund, Shannon, Glasgow, Liverpool, Cork, Rome, Oslo, Paris, Barcelona, Bologna, Bristol, Brussels, Doncaster Sheffield, Düsseldorf, East Midlands, Eindhoven, etc.

- transit-transport along Odra river route connecting Lower Silesia with Baltic seaports - Szczecin- Świnoujście and with the system of inland European waterways

- mineral resources of high value
- a well developed electro-mechanical industry
- a large amount of urbanisation
- high education, scientific and cultural potential (Wrocław takes the third ranking place among scientific and university centres in Poland)
- a great potential of tourism and recreation development
- rich cultural heritage: numerous monuments, also UNESCO World Heritage List: Centennial Hall in Wrocław, Cathedrals of Peace in Świdnica and Jawor

Sectors of high potential

Automotive

- qualified labour force
- high skilled engineering staff
- 35 universities on the territory of the voivodship. Wrocław Technical University - is one of the best technical universities in Poland.
- biggest investors in the motorisation sector, potential cooperation companies: AAM, Autoliv Poland, Bosch, Bridgestone Diversified Products Poland, Daicel Safety Systems Europe, Dr. Schneider Automotive Polska, DWS Draexlmaier Wyposażenie Wnętrz Samochodowych, Faurecia, GKN Driveline, HOERBIGER Polska, Industrie Maurizio Peruzzo Comfort, Metzeler Automotive Profile Systems Polska, NSK Steering System Europe, Pittsburgh Glass Works, Zakłady Samochodowe Jelcz, Ronal, Sanden Manufacturing Poland, TBMECA Polska, Toyota, Volkswagen, Volvo, Voss Automotive Polska, Wabco.
- Investors in transport sector: Bombardier Transportation, Wagony Świdnica S.A. (Greenbrier Company S.A.)
- relatively low labour costs in comparisons to other countries of Central and Eastern Europe.

Electro-mechanical

- network of potential sub-contractors and suppliers: ABB, Alstom, Archimedes, Bosch, Electrolux, Fabryka Aparatury Pomiarowej PAFAL, General Electric, KGHM Zanam, LG Electronics, Siemens, Whirlpool
- Elektrolux –4 factories in Poland: Świdnica, Żarów, Siewierz and Oława.

High-Tech

- specialized technical universities and scientific centres: Wrocław - the largest R&D centre in Poland. There are 122000 of students and around 32000 graduates are in Wrocław, 137000 of students and around 37000 graduates each year in Lower Silesia
- 6.5% of the inhabitants have high education, 61.1% of the population has secondary and post-secondary education;
- potential of high qualified staff with good knowledge of foreign languages, high rate of engineering staff;
- numbers of IT companies: 3M Poland, Capgemini NearShore Center, IBM, LG, LG Electronics, Nokia Siemens Networks, Siemens, Signity, Toshiba, UNIT4 TETA
- traditions resulting from the early technical achievements in the sector: first Polish computers in the 80's – Elwro

BPO

- 3rd largest BPO centre as for employment in the sector,
- one of the largest academic centres,
- high percentage of graduates speaking a foreign language,
- developed IT and ICT infrastructure,
- large office space offers,
- biggest investors in the BPO sector: IBM, HP, WIPRO, Credit Suisse, KPIT Cummins, Ernst Young, Geoban Irevna, McKinsey, Mphasis, Nokia Siemens Network, QAD, TietoEnator, UPS, Volvo, Google, amazon

Economic Potential

Gross domestic product in 2015

	in millions PLN	%	% per capita
Poland	1 798 302	100	100
Lower Silesia	151 450	8,45	111,5

Source: Central Statistical Office

Gross value added by kind of activity (mln. PLN) in 2015

***in 2014**

	Total	Agriculture, hunting and forestry; fishing	Industry	Construction	Trade and repair; hotels and restaurants; transport, storage and communication	Financial and insurance activity; real estate, renting and business activities	Other service activities
Poland	1595276	43419*	403844*	119345*	958331*	145104*	376591*
Lower Silesia	134352	1777*	44 477*	9579*	73217*	10995*	31212*

Source: Central Statistical Office

Average monthly gross wages and salaries (PLN) in 2016

Poland	4277,03	4121,41
Lower Silesia	4370,08	4189,23

Source: Central Statistical Office

Local job market

Economic activity of the population aged 15 years old and more (IV quarter of 2016)

	Economically active persons (in thous.)	Activity rate (%)	Registered unemployment rate (%)
Poland	17286	56,3	6,2
Lower Silesia	1315	56,7	5,4

Source: Central Statistical Office

Registered unemployed persons by educational level (2016)

	Total	Tertiary	Vocational	General	Basic vocational	Lower secondary, primary and incomplete primary
Poland	1335155	177559	289313	140870	355501	371912
Lower Silesia	85984	10304	17628	7918	23527	26607

Source: Central Statistical Office

Registered unemployed persons by age (IV quarter of 2016)

	Total	24 years and less	25-34	35-44	45-54	55 years and more
Poland	1 335 155	179 203	370 141	332 887	295 010	251 132
Lower Silesia	85 984	9 006	21 690	19 302	15 514	20 472

Source: Central Statistical Office

Higher education institutions including non-public higher education institutions

Higher education institutions in 2016

	Schools	Students	Graduates
Poland	390	1 347 481	364 399
Lower Silesia	33	130 425	33 458

Source: Central Statistical Office

Higher education institutions

Wroclaw University

Major areas of study: biology, biotechnology, chemistry, economics, physics, geology, IT, mathematics, environment protection, law, psychology, sociology, philology (English, Romance, German)

Wroclaw University of Technology (Politechnika Wroclawska)

Major areas of study: automation and robotics, mechanical technology, biotechnology, building and construction, electronics and telecommunications, electronics, physics, mining and geology, IT, chemistry, materials engineering, mechanical and machine construction and chemical engineering

Wroclaw University of Economics (Uniwersytet Ekonomiczny)

major areas of study: economics, finance and banking, marketing and management, spatial design, IT and econometrics, production engineering and management

Wroclaw University of Environmental and Life Sciences (Uniwersytet Przyrodniczy)

major areas of study: biology, biotechnology, surveying and cartography, spatial design, agriculture, fishing, agriculture and forestry, food technology, veterinary science, animal breeding

Wroclaw academy of Physical Education (Akademia Wychowania Fizycznego)

major areas of study: physical education, physiotherapy, sport, tourism and recreation

Wroclaw Medical University (Uniwersytet Medyczny we Wroclawiu)

major areas of study: doctors, doctors and dentists, pharmaceutical, medical analysis, nursing, physiotherapy, obstetrics, public health

State Higher Vocational School in Legnica (Państwowa Wyższa Szkoła Zawodowa)

major areas of study: administration, informatics, management and engineering of production, political science, tourism and recreation, management and marketing

Academy of Fine Arts in Wroclaw (Akademia Sztuk Pięknych)

major areas of study: interior architecture, design

University of business in Wroclaw (Wyższa Szkoła Handlowa)

major areas of study: administration and marketing, informatics and econometrics, tourism and recreation

Wroclaw College of Humanities (Wyższa Szkoła Humanistyczna)

major areas of study: geodesy and cartography, political science, international relations, land management, physiotherapy, construction, interior architecture, philology

WSB University (Wyższa Szkoła Bankowa we Wroclawiu)

major areas of study: English philology, finance and accounting, logistics, political science, business law, tourism and recreation, administration

International University of Logistics and Transport in Wrocław (Międzynarodowa Wyższa Szkoła Logistyki i Transportu we Wrocławiu)

major areas of study: construction, transport, logistics, land management

Investors in the region

Firm	Sector	Location
LG Electronics	white goods, electronic goods	Biskupice Podgórne
LG Philips	electronic goods	Kobierzyce
LG Chem Wrocław Energy Sp. z o.o.	automotive	Kobierzyce
Faurecia	automotive	Legnica, Wałbrzych
Toyota	automotive	Wałbrzych, Łęg
British Oxygen Corporation (BOC Group)	chemical industry	Brzeg Dolny
Mercedes - Benz Manufacturing Poland Sp. z o.o.	automotive	Jawor
Takata Petri	automotive	Wałbrzych
Smiths Group Aerospace	aviation	Dzierżoniów
Paradigm Precision	aviation	Nowa Wieś Wrocławska
Bahlsen	food processing	Stanowice
ABB Ltd	electronic goods	Wrocław
Whirlpool Europe Srl	white goods	Wrocław
Mondelez Polska Sp. z o.o.	food processing	Bielany Wrocławskie
Volkswagen AG	automotive	Polkowice
Volvo AB	automotive	Wrocław
Denso	automotive	Wrocław
IBM	high-tech	Wrocław
Campgemini	high-tech	Wrocław

Nokia Siemens Networks	high-tech	Wrocław
Materialize	business services	Bielany Wrocławskie
Google	business services	Wrocław
HP	business services	Wrocław
UPS	business services	Wrocław
Credit Suisse	business services	Wrocław

Useful addresses

Lower Silesian Marshal's Office (Urząd Marszałkowski Województwa Dolnośląskiego)

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