Destination Silesia

2015

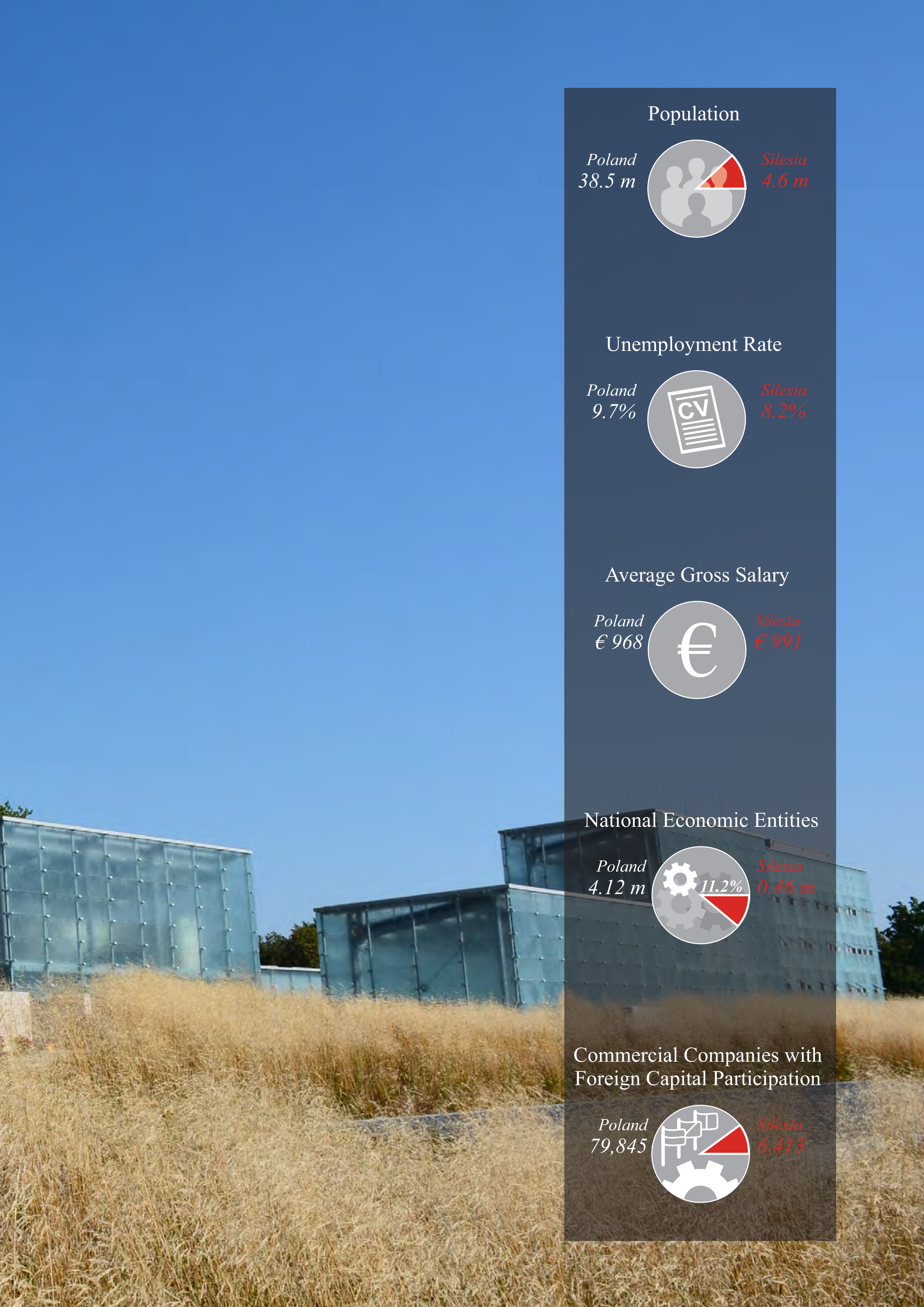
Dear Reader,

We are pleased to present a new research report on the untapped potential of the Silesian market.

Over the last twenty-five years, Poland has undergone an enormous political, economic and social transformation: Upper Silesia, Poland's main heavy industry hub to date, is at the heart of these changes.

The region has undergone a profound metamorphosis to become a strong automotive cluster, drawing upon its long standing industrial traditions. Today Upper Silesia is one of Poland's largest concentrations of industrial space, second only to Warsaw. However, the region has also grown into one of the country's main centres for modern business services, thanks in part to the sizeable population; its full potential in this respect is still untapped.

We trust that this report will provide an interesting insight into the Silesia of today.



Population

Poland *38.5 m*

Silesia *4.6 m*

Unemployment Rate

Poland *9.7%*

Silesia *8.2%*

Average Gross Salary

Poland *€ 968*

Silesia *€ 991*

National Economic Entities

Poland *4.12 m*

11.2%

Silesia *0.46 m*

Commercial Companies with Foreign Capital Participation

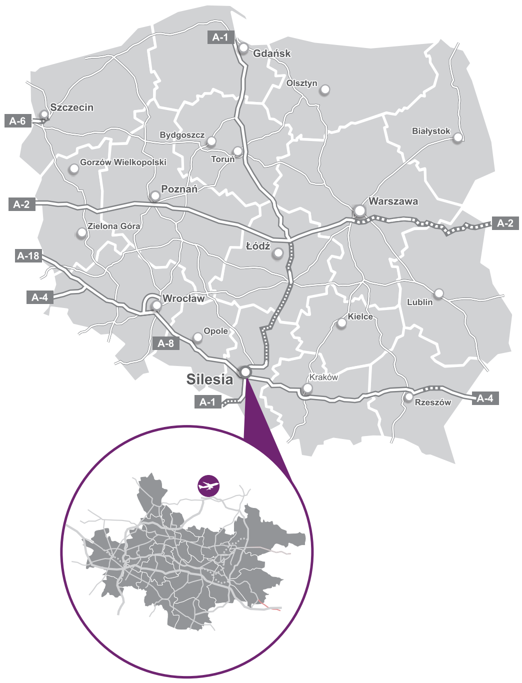
Poland *79,845*

Silesia *6,413*

Content

LOCATION

Strategic Location & Well Developed Infrastructure

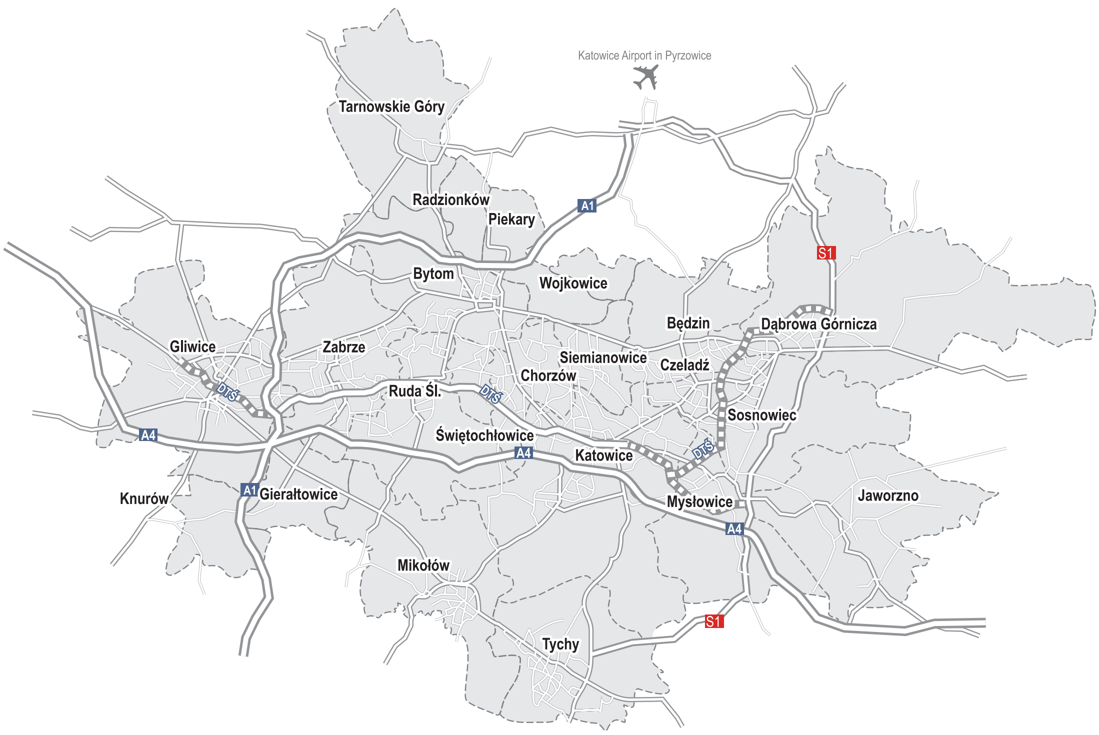


- Fourth busiest airport in Poland (2.7 million passengers in 2014)
- Second busiest cargo airport in Poland in 2014
- Regular flight connections to Europe operated mainly by WizzAir, Ryanair, Lufthansa and LOT
- Opening of a second runway (May 2015) has accelerated further growth and made possible flights to new destinations outside Europe

- Excellent network of major international and national roads
- Junction of major highways (A1 and A4)
- Densest road network in Poland

- Well developed railway network
- Intermodal Container Hub in Sławków links European and Asian rail networks

Major Cities of the Silesia Agglomeration



The Silesian voivodship is one of the leading regions in Poland in terms of economic and demographic potential. With 2.1 million inhabitants in 22 cities, the Silesia agglomeration is the administrative and economic centre of the voivodship.

The Silesia agglomeration includes the following cities: Katowice, Sosnowiec, Gliwice, Zabrze, Bytom, Ruda Śląska, Tychy, Dąbrowa Górnicza, Chorzów, Jaworzno, Mysłowice, Siemianowice Śląskie, Tarnowskie Góry, Będzin, Piekary Śląskie, Świętochłowice, Knurów, Mikołów, Czeladź, Radzionków, Gierałtowice and Wojkowice.

Three other important cities in the voivodship that are not considered part of the Silesia agglomeration are Częstochowa, Bielsko-Biała and Rybnik, home together to a total of 0.54 million people.

ECONOMIC METAMORPHOSIS

The Silesia agglomeration has also undergone a significant metamorphosis since the beginning of the economic transformation in Poland in the early '90s.The first part of that decade saw a gradual process of deindustrialization in the region that resulted in significant changes on the local labour market.

The most significant economic stimulus was created by General Motors' investment in Gliwice in 1998. The large new car production facility built on the outskirts of the city, along with the investments made by Fiat in its car factories in Tychy and Bielsko-Biala and new automotive investments in the northern part of the Czech Republic and Slovakia, attracted several additional subcontractors to the region. This strong inflow of investments by several international car manufactures allowed Silesia to relatively quickly transform into an important automotive cluster in Central Europe.

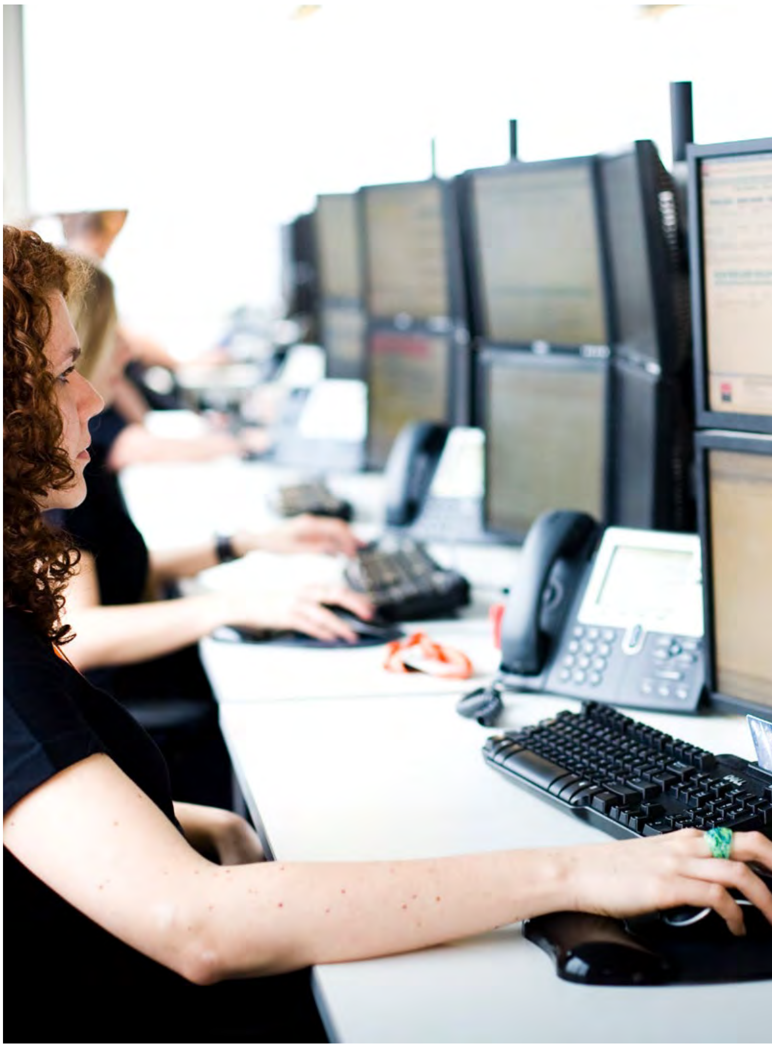
The second significant economic stimulus for the labour market began eleven years ago, when Poland joined the EU and the first investments by the Business Process Outsourcing (BPO) sector were made in the country. Currently, the Silesia agglomeration is ranked sixth in Poland in terms of employment in the BPO sector, but, taking into account its demographic potential, it can quickly expand in the next few years.

These changes would have not been possible without the significant inflow of funds from the European Union and support from the Katowicka Specjalna Strefa Ekonomiczna (the KSSE). Large amounts of funding enabled some post-industrial sites to be revitalised, new infrastructure projects to be built and the quality of life in the region to be significantly improved. After the closing of coal mines, post-industrial sites were transformed into new projects, such as retail (e.g. Silesia City Center), warehouse/office (e.g. GPP), cultural facilities or green spaces.

ECONOMIC METAMORPHOSIS

Economy Sector	Mining	Automotive	Business Process Outsourcing
Employment * early '90s	416,000	3,000	0
Employment * 2015	101,000	31,000	11,200
Trend	↓	↗	↑
Major Companies	• Kompania Węglowa • Katowicki Holding Węglowy • Jastrzębska Spółka Węglowa	• General Motors • NGK Ceramics • Brembo	• Capgemini • IBM • PwC

* Estimate



THE KATOWICE SPECIAL ECONOMIC ZONE

The economic transformation of the Silesian economy is firmly driven by investments made by companies operating in the Katowicka Specjalna Strefa Ekonomiczna (the KSSE), which has enabled the region to transform and develop into one of the most important automotive clusters in Europe.

The landmark investment made by General Motors in Gliwice in the early '90s, followed by further investments by Fiat in Tychy and Bielsko-Biała, attracted new investors from the automotive sector, which now accounts for 63% of all investments in the KSSE.

The KSSE is the right choice for those companies which would like to make use of public aid in the form of Corporate Income Tax (CIT) exemption, calculated on the basis of the amount invested or the number of new jobs created. With regards to investment costs, the total amount of tax relief depends on the size of the enterprise: up to 25% of that cost for large companies, while medium-size and small firms are granted an additional 10% and 20%, respectively. For newly created jobs, the total amount of tax relief for big enterprises is up to 25% of the two-year labour costs for the new jobs created; medium-size and small enterprises are granted an additional 10% and 20%, respectively. The tax relief granted is compliant with the regulations in force in similar institutions operating in other European Union countries.

The KSSE operates in four subzones located in the vicinity of Gliwice, Tychy, Sosnowiec-Dąbrowa and Jastrzębie-Żory.

Piotr Wojaczek
CEO of the KSSE

“The Katowice Special Economic Zone was established in 1996, and the results of its operations have far exceeded the expectations of its founders. We have effectively contributed to the transformation of the Silesian economy and significantly accelerated the process of restructuring the region by attracting investments from the high-tech sector, and transfers of high-tech technology and know-how.

During this period, the KSSE has expanded from 800 hectares to almost 2,400 hectares, and attracted more than 260 Polish and foreign investors, who have invested almost €5.6billion and employed more than 55,000 workers. This result makes the KSSE one of the leading special economic zones in Poland.”

LABOUR MARKET

The Silesia agglomeration offers a strong education infrastructure, with both public and private universities covering all major educational profiles. Major public universities are located in Katowice and Gliwice:

- the University of Silesia in Katowice,
- the Silesian University of Technology in Gliwice,
- the University of Economics in Katowice,
- the Medical University of Silesia in Katowice.

Several other universities and higher schools are located in other cities of the voivodship, such as Częstochowa and Bielsko-Biała.

Graduates from various scientific disciplines, including those essential for the development of the business service sector, i.e. the economic, financial, banking, engineering and technical fields are constantly entering the labour market.

Nearly 10% of Poland's research and development potential is located in the region, creating the second largest research centre in Poland (after Warsaw), with more than 80 scientific and R&D units.

Top 100 Universities in Poland (2014)

Rank	Name	City	Number of students
1	University of Warsaw	Warsaw	52,000
2	Jagiellonian University	Kraków	47,000
3	Adam Mickiewicz University	Poznań	47,000
20	University of Silesia	Katowice	29,000
23	Silesian University of Technology	Gliwice	25,000
28	Medical University of Silesia	Katowice	9,000
43	University of Economics	Katowice	13,000

Source: Perspektywy 2015

Agnieszka Kolenda
Regional Manager
Hays Poland

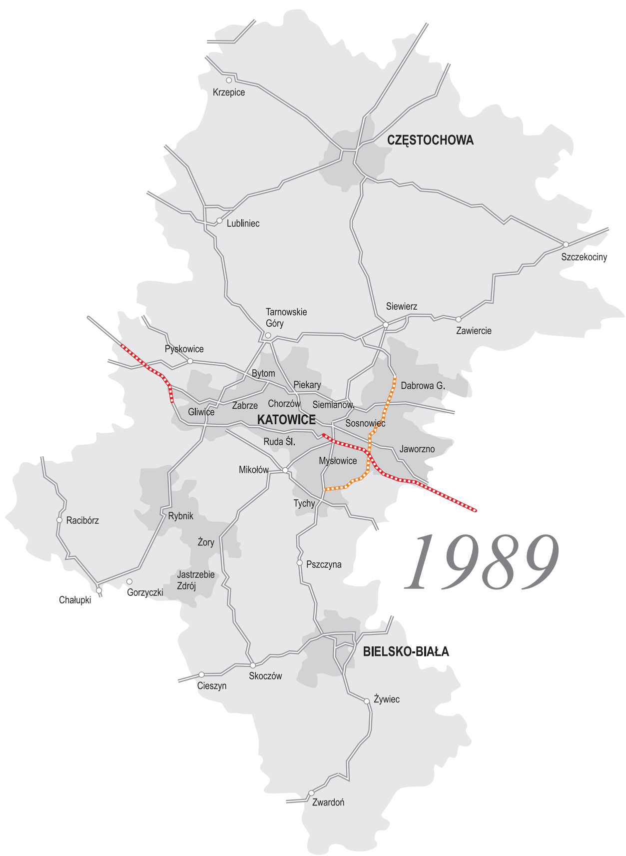
"Although Silesia remains the most industrial district of Poland, the dynamics of the regional labour market have changed considerably in recent years. The Silesia agglomeration has become a location favoured by investors from the Business Process Outsourcing (BPO) sector, which has seen an increase in employment of more than 10%.

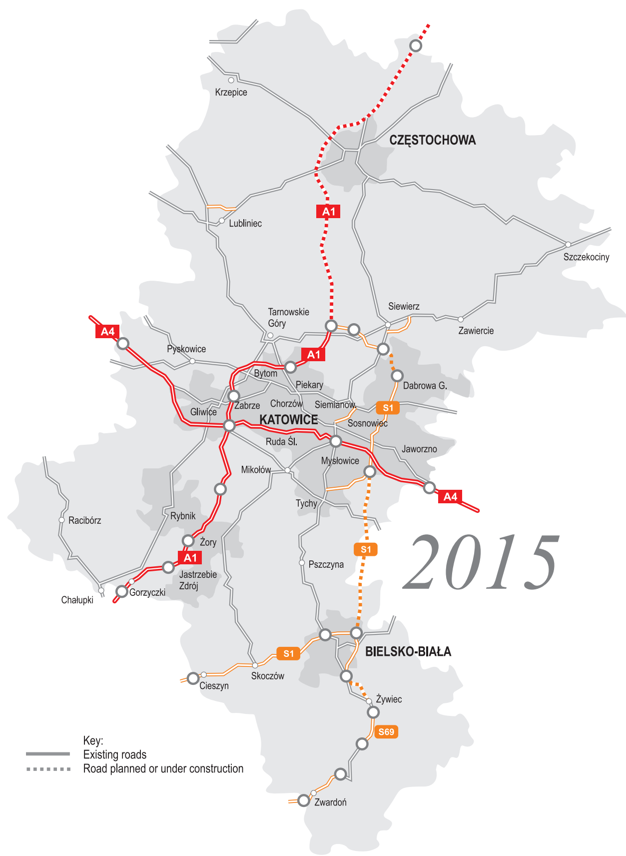
The 83 centres located in the region (mainly in Katowice) generate growing demand for IT, Accountancy & Finance and HR & Payroll specialists with a knowledge of various foreign languages. These recruitment needs can be easily satisfied by the large number of graduates in branch-related disciplines (e.g. business and administration, IT, philology) who know foreign languages: 93% speak English, 45% German and 8% Russian.

Language skills and one of the largest academic centres in Poland are invaluable assets for BPO companies, which frequently seek highly qualified IT specialists in the region for top quality IT services. Silesia has 4.6 million inhabitants, which creates a strong internal demand for shop assistants and retail specialists."

INFRASTRUCTURE & CONNECTIVITY

Development of Major Highways and Express Roads





Silesia has an excellent and still expanding road network offering convenient access to major Polish cities and national borders:

- Kraków (80 km)
- Wrocław (197 km)
- Warsaw (290 km)
- Łódź (194 km)
- Czech border (74 km)
- Slovak border (107 km)
- Ukrainian border (342 km)
- German border (343 km)

Two major highways (the A1 and the A4) meet in Silesia (the Gliwice-Sośnica junction), providing an effective by-pass for the cities of the agglomeration.

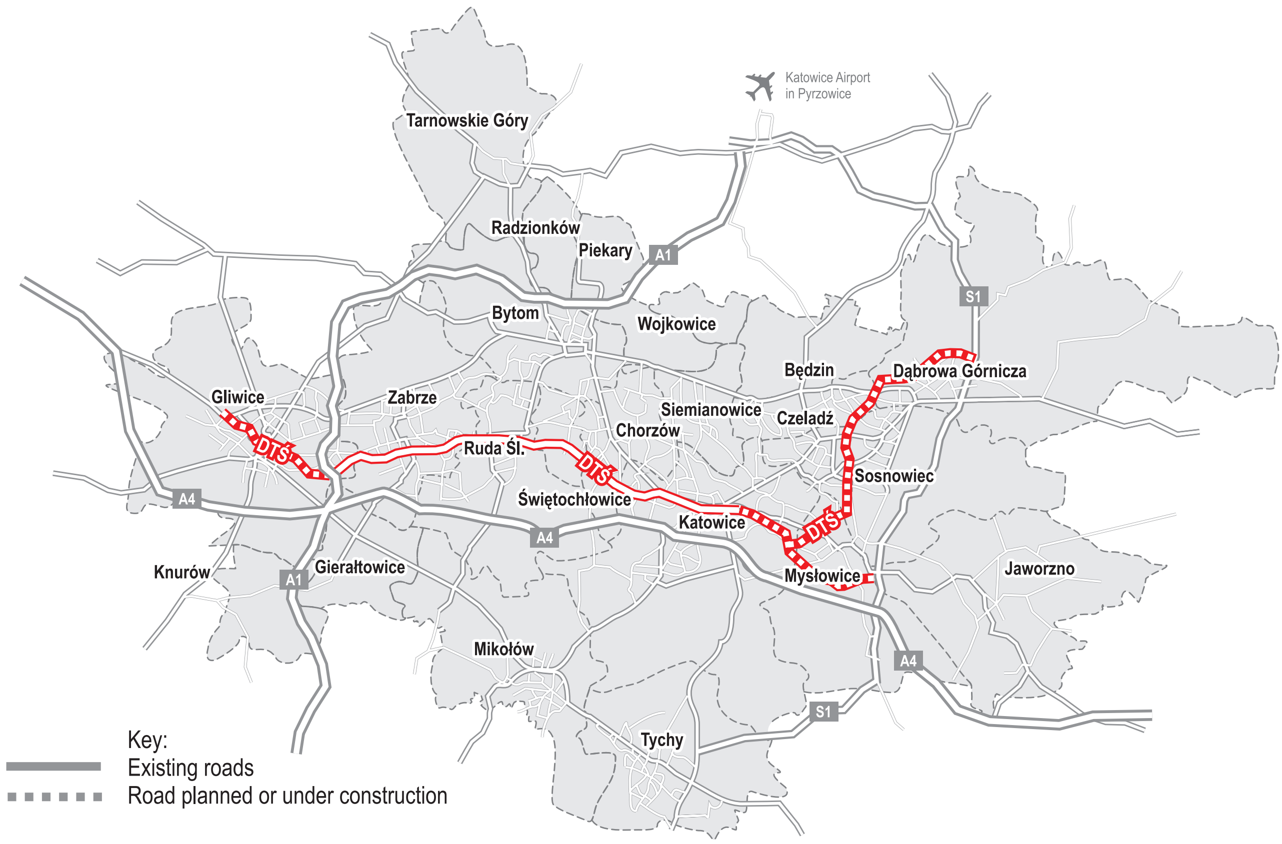
A complementary express road (the S1) and the DTŚ create an excellent transport network between Silesia's cities.

INFRASTRUCTURE & CONNECTIVITY

The DTŚ (the Diametral Highway) is an internal highway which runs through the agglomeration, linking the eastern and western borders of Silesia, facilitating road transport within the cities of Silesia.

The initial preparation work for the DTŚ was done in the '70s & '80s, but the major construction work started in the '90s. Today 25.7 km have been completed, significantly improving transport between Gliwice and Katowice. The western part of the DTŚ in Gliwice is still at the construction stage; an extension towards the east, to Jaworzno and Dąbrowa Górnicza, is planned.

The convenient transport within the agglomeration has already attracted several major investments which are located along this road, e.g. Silesia City Center (retail), car dealers, hotels, and office developments in Katowice.



INFRASTRUCTURE & CONNECTIVITY

The Fast Growing Katowice Airport at Pyrzowice

2001	2007	2014
0.2	2.0	2.7 m passengers
2,196	7,795	16,269 tons of cargo

Katowice airport is located 30 km north of the centre of Katowice and is the major airport for the Silesia voivodship. Continuous investments and improvements in services for passengers and cargo transport fuel further growth.

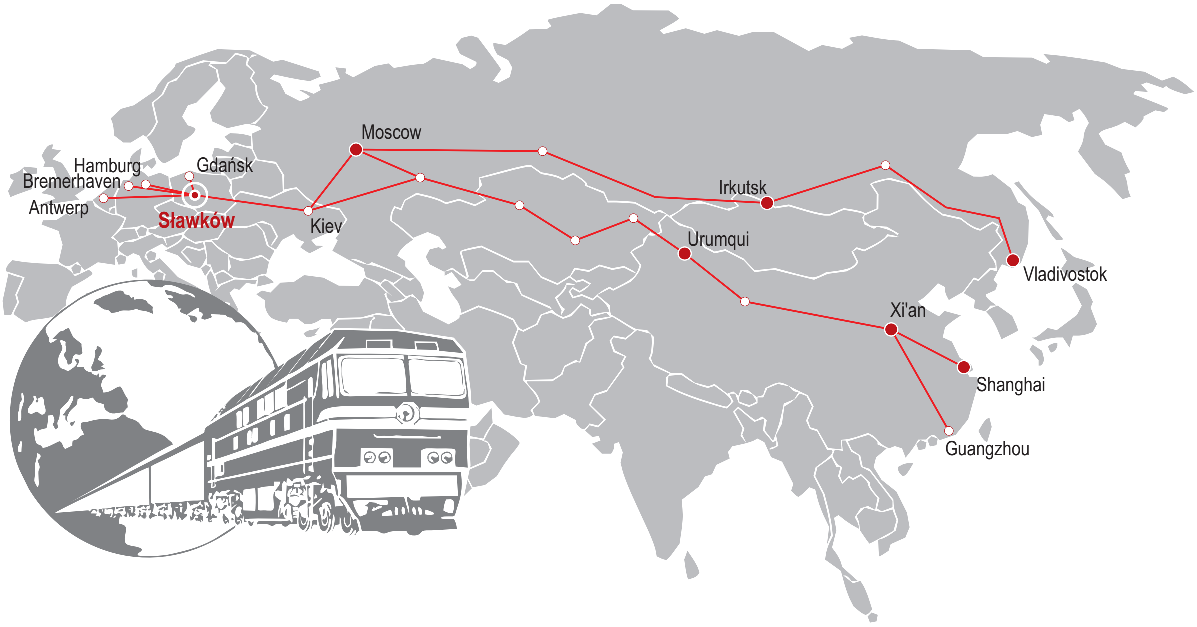
Extensions of the terminal and the recently completed second runway (3,200 m long, opened in May 2015) have created opportunities for further development. Currently, Katowice airport is second in Poland only to Warsaw's Chopin airport in terms of cargo transport.

The airport's proximity to the A1 and the S1 combined with the availability of land create significant potential for development of the logistics sector.

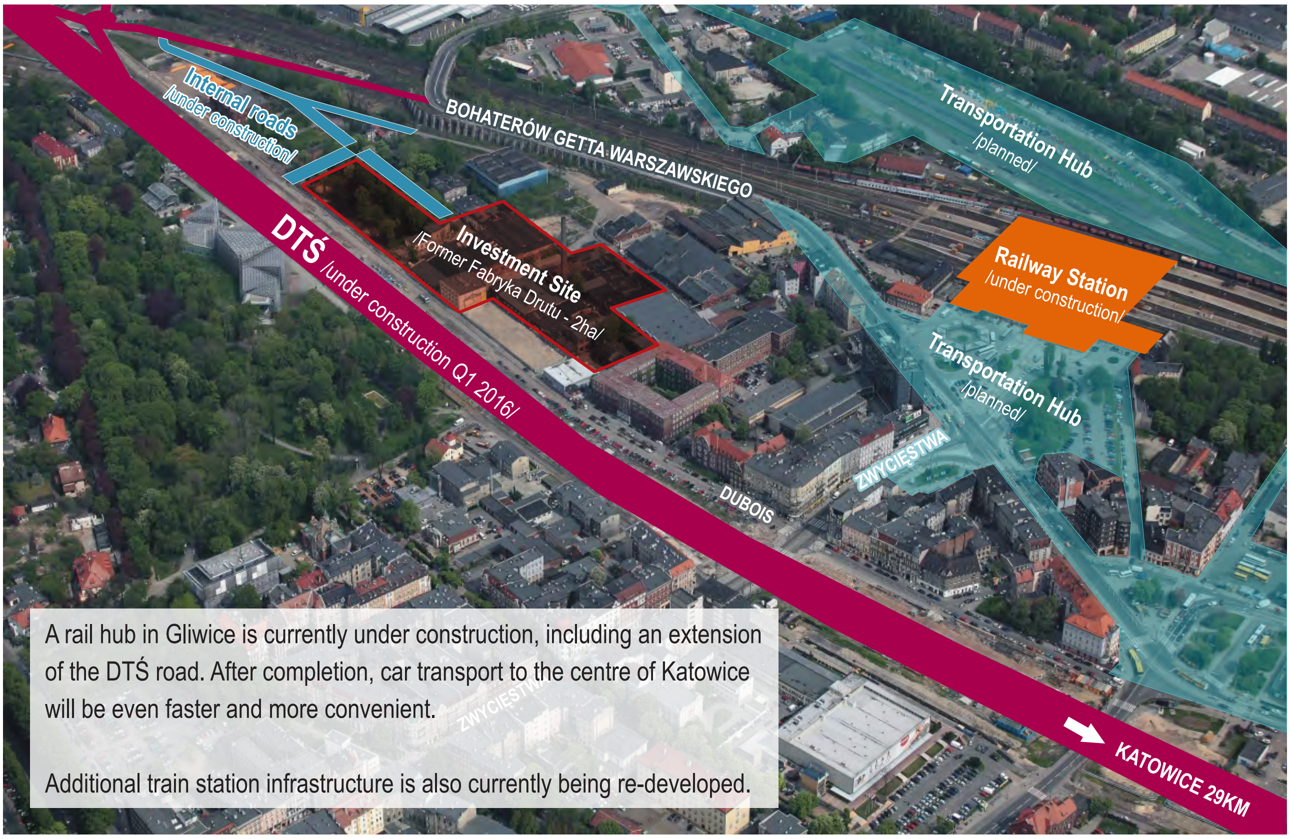
Intermodal Container Hub in Sławków

Euroterminal Sławków is a train logistics terminal located at the junction of the western-most stretch of the broad-gauge (1,520 mm) railway line and the European standard-gauge (1,435 mm) railway line, offering convenient links for international train transport between Asia and Western Europe.

Some additional investments have been made in infrastructure over the last few years so as to increase the capacity of the hub; however, its potential is still not fully tapped.



Re-development of Gliwice Transportation Hub

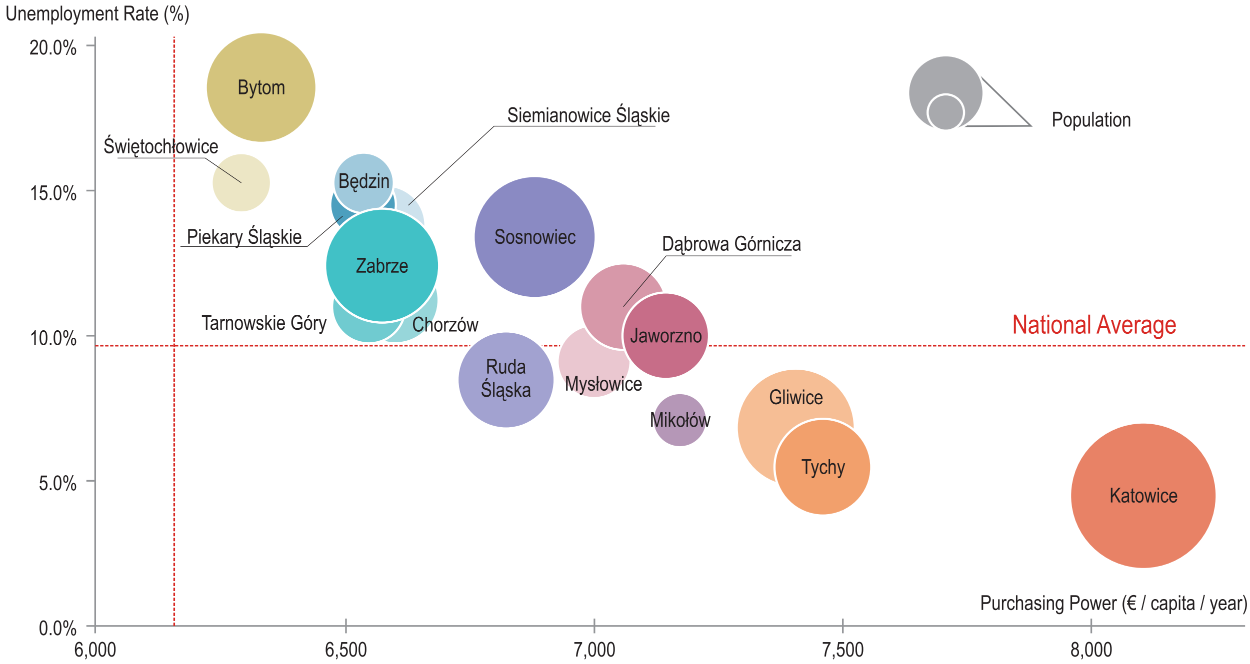


A rail hub in Gliwice is currently under construction, including an extension of the DTŚ road. After completion, car transport to the centre of Katowice will be even faster and more convenient.

Additional train station infrastructure is also currently being re-developed.

ECONOMIC DIVERSITY OF SILESIA

Despite their similar historical backgrounds and geographical proximity, Silesia's cities differ significantly in terms of economic potential. Nowadays, most economic growth and development is generated by three major cities, i.e. Katowice, Tychy and Gliwice. With their relatively high purchasing powers (significantly higher than the national average), and unemployment levels also well below the national average, these cities can be seen as examples of successful economic transformation.



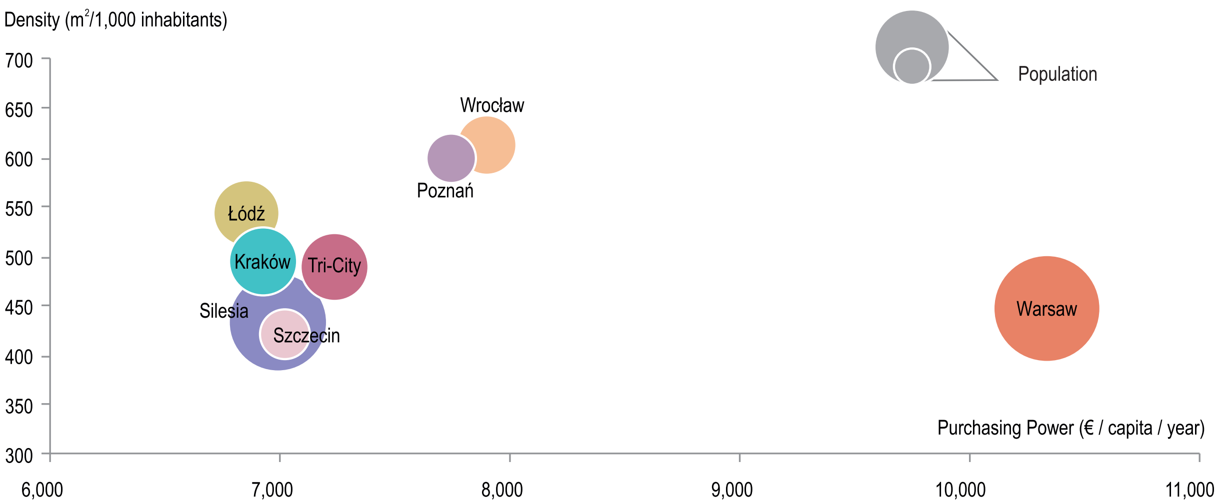
Source: GUS 2015, GfK 2014

RETAIL MARKET IN SILESIA

Rafał Nowicki
CEO Europe
Apollo-Rida Poland

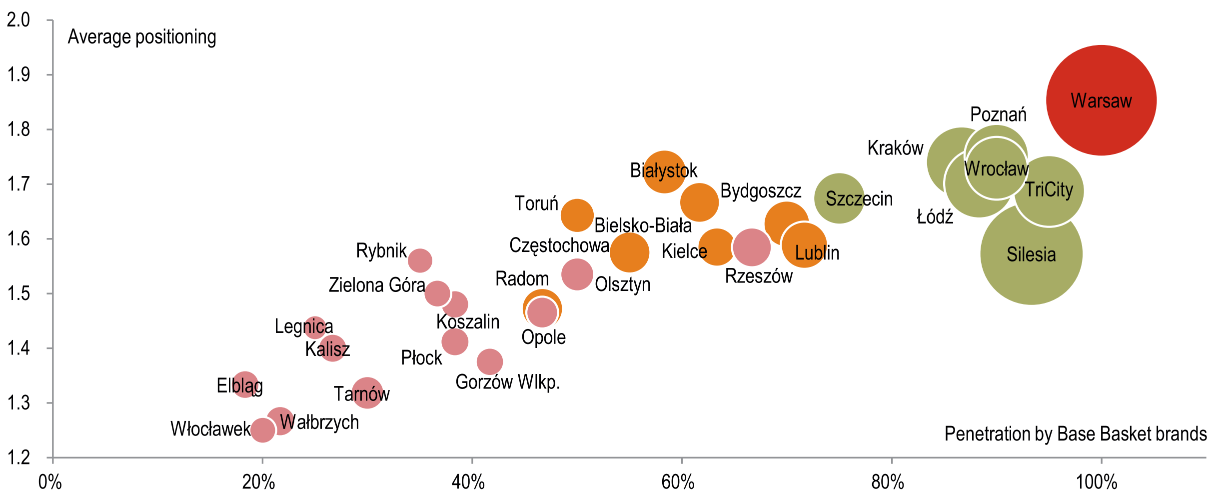
"The Silesia agglomeration has undoubtedly been a great beneficiary of the changes of recent years. In particular, the development of the road infrastructure, as well economic diversification, has contributed to a significant increase in the mobility of its residents and harmonization of the region, which translates into its still growing attractiveness. These changes also influence the commercial real estate market.

Large retail schemes covering a large area are performing well, as are complementary retail schemes focused on a local market. An example of the latter is the Skałka shopping centre currently being developed in Tychy by Apollo-Rida."



Source: JLL, Q3 2015

The Silesia agglomeration is the second largest market in Poland in terms of retail stock (1.3 million m²) after the Warsaw agglomeration. With 38 modern shopping centres, 16 retail parks, 17 stand-alone retail warehouses and one outlet centre, the region has a very strong retail range covering all types of retail schemes. The reasonably high purchasing power of €6,991 per capita per year (13% higher than the national average), the relatively low shopping centre density and moderate vacancy rate (3.0% as of H1 2015) allow the Silesian market to be characterized as relatively healthy with development potential in the future. Rental levels in prime shopping centres in Silesia range between €45 and €55 / m² / month and are in-line with comparable schemes in Wrocław, Łódź and Szczecin.

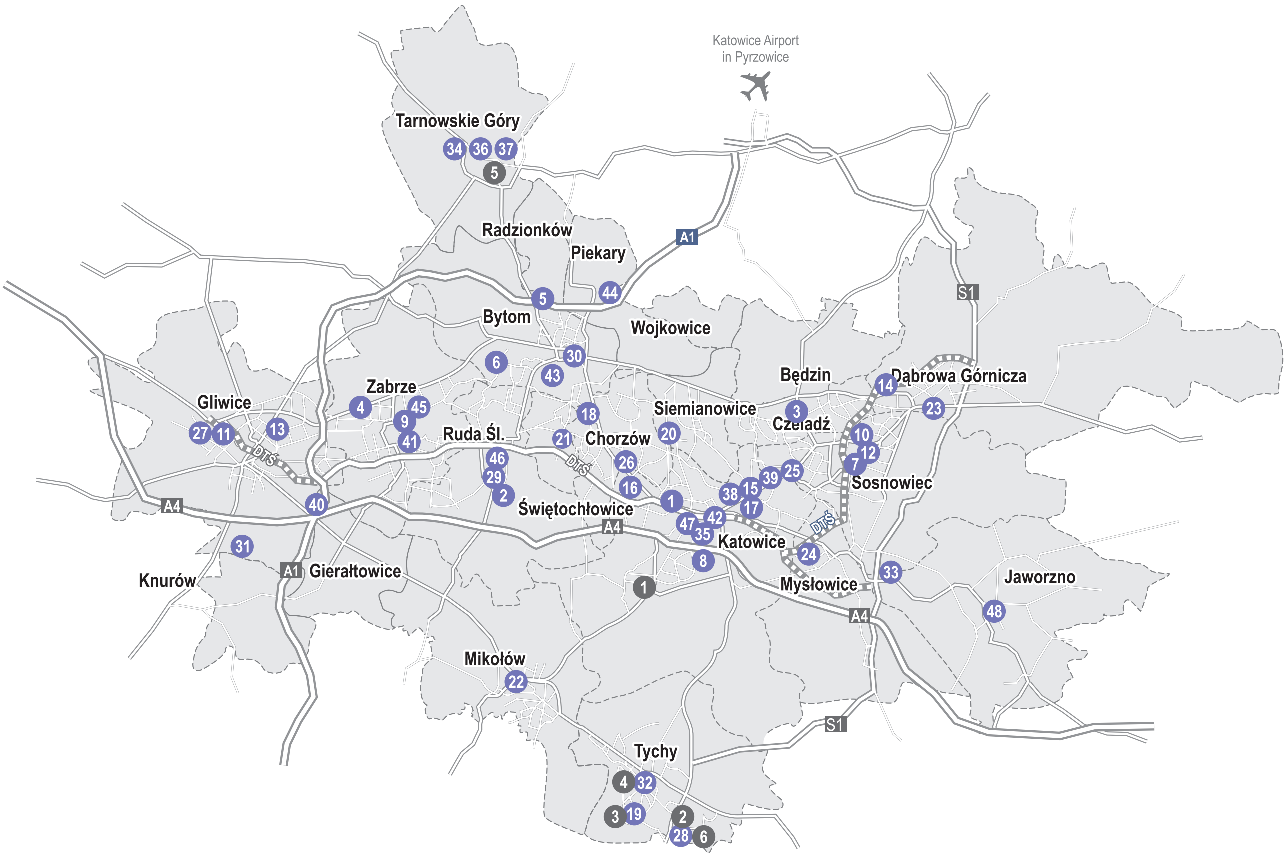


Source: JLL, Q3 2015

In July 2015, JLL carried out an analysis of all shopping centres in major Polish cities in terms of their retail range (tenant-mix). The major findings and conclusions can be found in the report titled “Wide or unique?”.

Silesia, with a strong result of 93% (market penetration by major retail basket brands), proved that it is one of the leading retail markets in Poland in terms of quantity and quality of retail merchandise. The most attractive retail ranges in Silesia are currently available in the following shopping schemes: Silesia City Center, Galeria Katowicka and Forum Gliwice.

RETAIL MARKET IN SILESIA



Selected Retail Developments

Existing

1. Silesia City Centre Katowice
2. Ruda Śląska Plaza
3. M1 Czeladź
4. M1 Zabrze
5. M1 Bytom
6. Atrium Plejada Bytom
7. Plejada Sosnowiec
8. 3 Stawy Katowice
9. Platan Zabrze
10. Auchan & Leroy Merlin & Decathlon Sosnowiec
11. Arena & Leroy Merlin & Decathlon Gliwice
12. Sosnowiec Plaza
13. Forum Gliwice
14. Pogoria
15. Rawa Park Handlowy (Ikea)
16. Auchan Katowice
17. Dąbrówka & Castorama Katowice
18. Tesco & Obi Bytom
19. Centrum Skałka Tychy
20. Atrium Siemianowice
21. Atrium Świętochłowice
22. Auchan Mikołów + Leroy Merlin + Decathlon
23. Real Dąbrowa Górnicza
24. Real Mysłowice
25. Real Sosnowiec
26. AKS Chorzów
27. Tesco Gliwice
28. Tesco Tychy
29. Tesco Ruda Śląska
30. Agora Bytom
31. Auchan Gliwice
32. City Point Tychy
33. Fashion House Sosnowiec
34. Tesco Tarnowskie Góry
35. Belg
36. Carrefour Tarnowskie Góry
37. Park Handlowy Tarnowskie Góry
38. Meble Agata Katowice
39. Nowy Rożdzień Retail Park
40. Europa Centralna
41. Galeria Zabrze
42. Galeria Katowicka
43. Szombierki Retail Park Bytom
44. Marcredo Piekary Śląskie
45. Park Handlowy Zabrze
46. Ruda Park - Ruda Śląska
47. Supersam Katowice
48. Galeria Galena Jaworzno

Planned

1. Galeria Echo Katowice
2. Gemini Park Tychy
3. Centrum Skałka Extension
4. City Point Tychy Extension
5. Centrum Zakupów Tarnowskie Góry
6. Tesco Tychy Extension

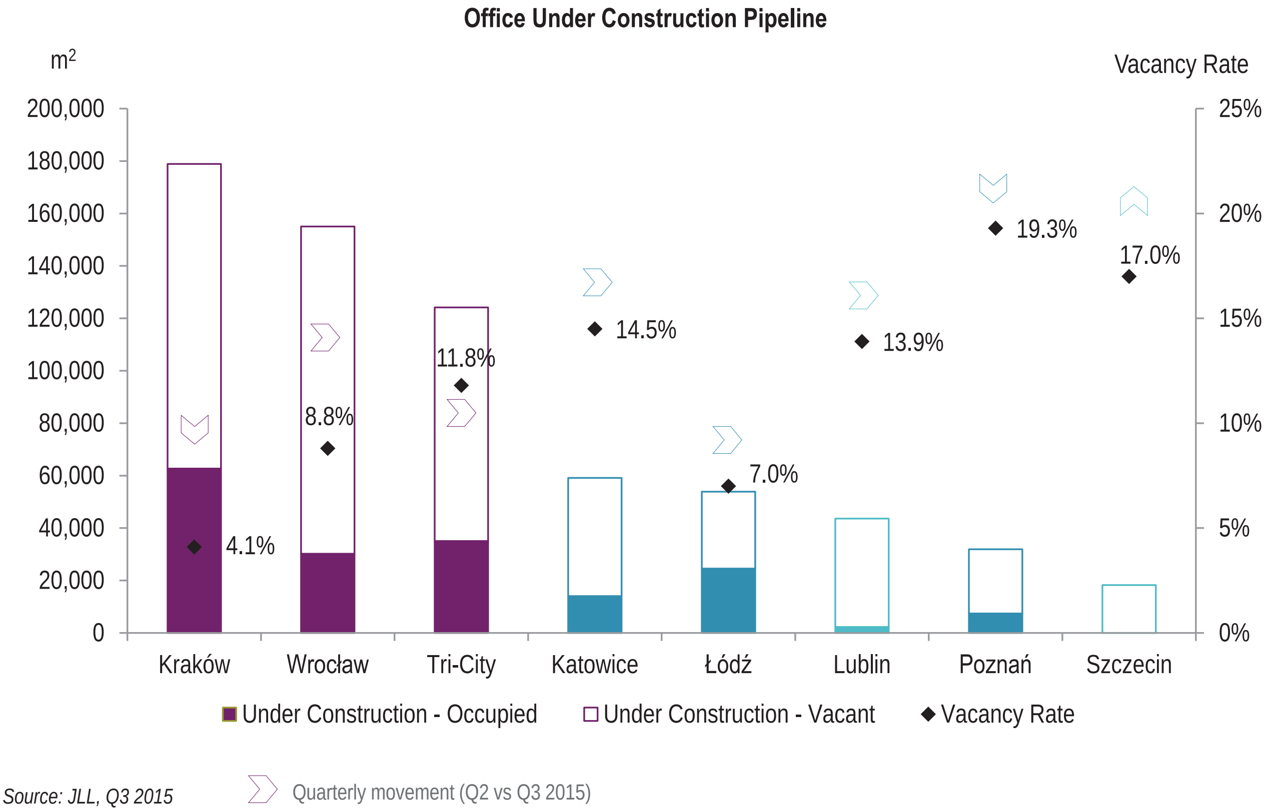
MAJOR RETAIL CENTRES IN SILESIA

Property	City	Investor	Completion	Size (m²)
Silesia City Center	Katowice	Allianz, ECE, Private Investors	2005 (ext. 2011)	85,500
Europa Centralna	Gliwice	Helical Poland	2012 (SC & RP)	67,000
M1 Czeladź	Czeladź	Apollo Rida / AXA	1997 (ext. 1999 & 2008)	52,500
Galeria Katowicka	Katowice	Meyer Bergman, PKP, Neinver	2013	49,000
M1 Zabrze	Zabrze	Apollo Rida / AXA	1999 (ext. 2011)	48,100
Forum Gliwice	Gliwice	Deka	2007	42,500
Galeria Echo	Katowice	Echo Investment	Planned	42,000
Galeria Galena	Jaworzno	P.A. Nova	Q4 2015	31,400
3 Stawy	Katowice	Union Investment	1999	32,500
Supersam	Katowice	Griffin Real Estate	Q3 2015	23,000
Centrum Skałka	Tychy	Apollo-Rida	1998 (ext. 2017)	+16,700 (extension to 36,000)

OFFICE MARKET IN SILESIA

The modern office market in the Silesia agglomeration is mainly served by assets located in Katowice, which is the region's leading administrative and business centre. Additionally, a number of modern assets have been built in other cities in the voivodship (e.g. Częstochowa) jointly offering 140,000 m².

In terms of total office stock, Katowice is ranked fourth among Polish regional cities, after Kraków, Wrocław, the Tri-City and Poznań. This is in line with the development of the modern business services (BPO, SSC and R&D) sector in Poland. Taking into account Silesia's economic and demographic potential, fifth position in the office sector is certainly below what is possible.



Source: JLL, Q3 2015

To date major demand for office space in regional cities has been generated by the rapidly developing BPO sector. International firms target Katowice and other key cities, as they offer a well-educated and skilled labour force. The market is driven by both expanding companies, as well as newcomers entering the market. The majority of them have had successful operations in Poland and so decide to increase their staff and carry out more complex services in Poland, which positively affects the office and labour market. The office market in Katowice is very absorptive and in our opinion has very positive development perspectives.

With Katowice as the major office market in Silesia, an investment zone along the DTŚ road in the centre of Katowice is gradually emerging as an office downtown. Central location, convenient access and availability of development land enable one to assume that the financial centre of Silesia in the future will be located there.

The average size of A class office buildings in Katowice varies between 7,500 and 12,000 m². The vast majority of office developments are being built on a speculative basis by experienced developers such as GTC, Skanska, Echo Investment, Ghelamco, LC Corp, GPP and Opal.

OFFICE MARKET IN SILESIA

Supply	OFFICE STOCK (Q3 2015)	**381,800 m^2**
	COMPLETIONS (Q1–Q3 2015)	**16,100 m^2**
	COMPLETIONS (2014)	**66,100 m^2**
Demand	GROSS TAKE-UP (Q1–Q3 2015)	**52,100 m^2**
	GROSS TAKE-UP (2014)	**48,300 m^2**
	NET TAKE-UP (Q1–Q3 2015)	**35,400 m^2**
Vacancy	VACANCY RATE (Q3 2015)	**14.5%**
	VACANT STOCK – EXISTING STOCK (Q3 2015)	**55,200 m^2**
FOR RENT	NO. OF OPTIONS ABOVE 2,000 m^2 — Existing buildings	**8**
	Under construction buildings	**6**
Pipeline	UNDER CONSTRUCTION OFFICE STOCK	**58,200 m^2**
Rents	PRIME HEADLINE RENT	**12.5 – 13.75 €/m^2/month**

SELECTED MAJOR EXISTING OFFICE BUILDINGS

Building	City	Class	Size (m^2)
A4 Business Park I & II	Katowice	A	17,800
Katowice Business Point	Katowice	A	16,200
ING Bank Śląski II	Katowice	A	15,500

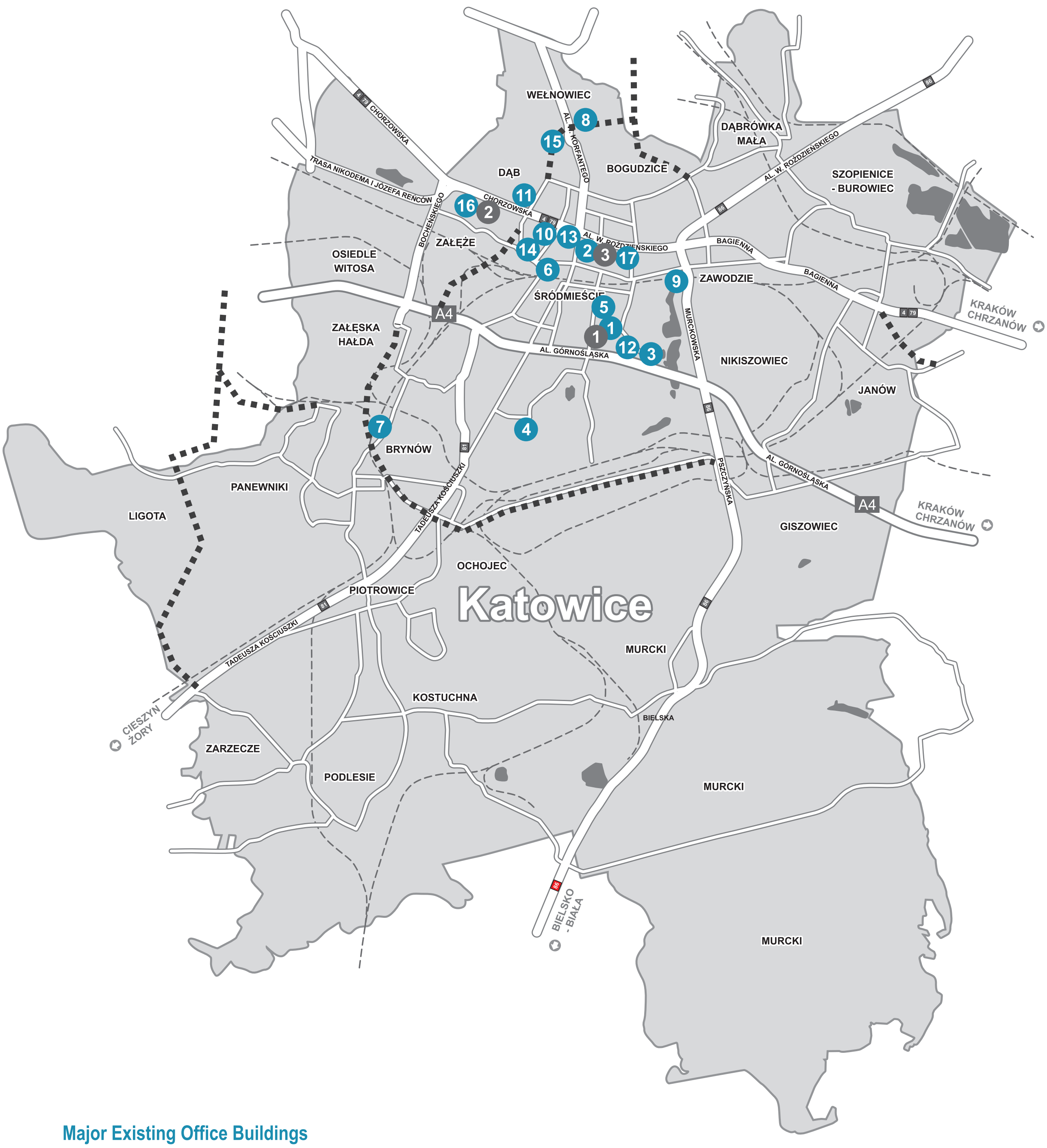
MAJOR OFFICE SCHEMES IN PIPELINE

Building	City	Class	Completion	Size (m^2)
Silesia Business Park B, C	Katowice	A	2015/2016	21,300
Silesia Star II	Katowice	A	Q3 2016	12,400
A4 Business Park III	Katowice	A	Q3 2016	12,100

LARGEST LEASE TRANSACTIONS Q1-Q3 2015

Tenant	Building	Leased Area (m^2)
Confidential tenant	Katowice Business Point	10,000
PKP Cargo	A4 Business Park II	7,600
Capgemini Polska	Silesia Business Park B	5,600

OFFICE MARKET IN SILESIA



Major Existing Office Buildings

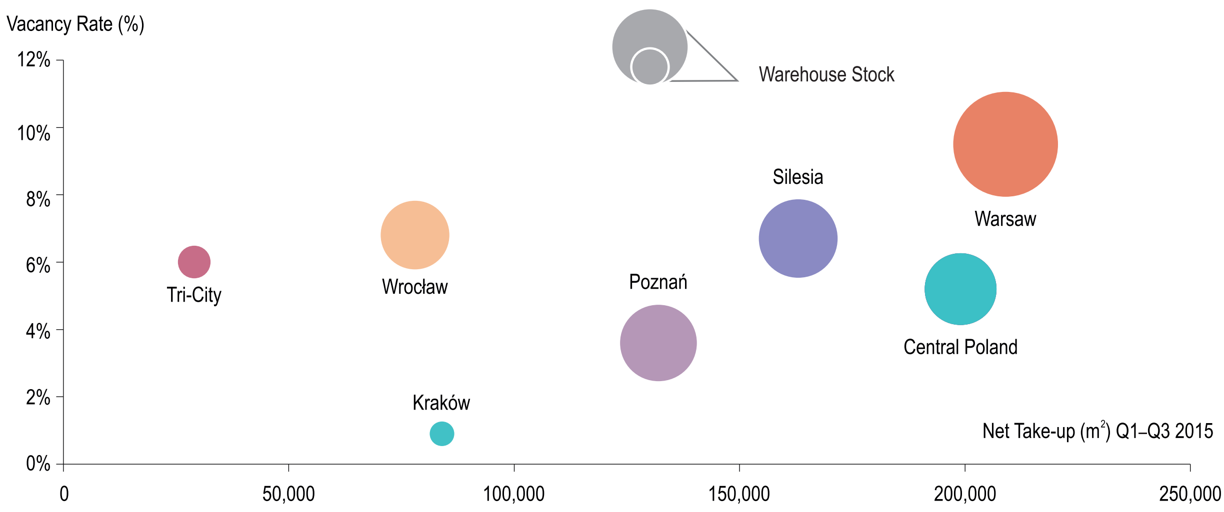
1. A4 Business Park I & II
2. Altus
3. Atrium
4. Brynów Center I
5. Centrum Biurowe Francuska A&B
6. Energomontaż
7. Euro-Centrum I-VIII
8. GPP Business Park I-III
9. Green Park I-III
10. ING Bank Śląski I&II
11. Katowice Business Point
12. Millennium Plaza
13. Nowe Katowickie Centrum Biznesu
14. Opolska 22 (A,B,C,D,E,F)
15. Reinhold Center A&B
16. Silesia Business Park A
17. Silesia Star I

Under construction

1. A4 Business Park III
2. Silesia Business Park B, C
3. Silesia Star II

■■■■ Planned roads

WAREHOUSE MARKET IN SILESIA



With 1.65 million m² of modern industrial stock, Silesia is the second market in Poland, after Warsaw (2.9 million m²). The markets of Upper Silesia, Poznań, Wrocław and Central Poland are considered to be secondary markets driven by well developed infrastructure and investments.

Rents in Upper Silesia are among the lowest in Poland. It should be underlined that Upper Silesia serves as a logistics hub not only for the Katowice agglomeration but also for nearby Kraków, which is only a minor industrial market with limited supply and has much higher rents. As of Q3 2015, headline rents in Upper Silesia stood at €2.8 to €3.5 / m² / month, with effective rents ranging from €1.9 to 3.1 / m² / month.

Industrial stock in Silesia is concentrated in the hands of the largest landlords in Poland, including Prologis and its JV partners, SEGRO and its JV partners, and Logicor.

WAREHOUSE MARKET IN SILESIA

Supply	WAREHOUSE STOCK (Q3 2015)	**1,652,000 m²**
	COMPLETIONS (Q1–Q3 2015)	**90,700 m²**
Demand	NET TAKE-UP (Q1–Q3 2015)	**163,400 m²**
Vacancy	VACANCY RATE (Q3 2015)	**6.7%**
Pipeline	UNDER CONSTRUCTION WAREHOUSE STOCK	**133,500 m²**
Rents	PRIME EFFECTIVE RENT	**1.90 – 3.10 €/m²/month**

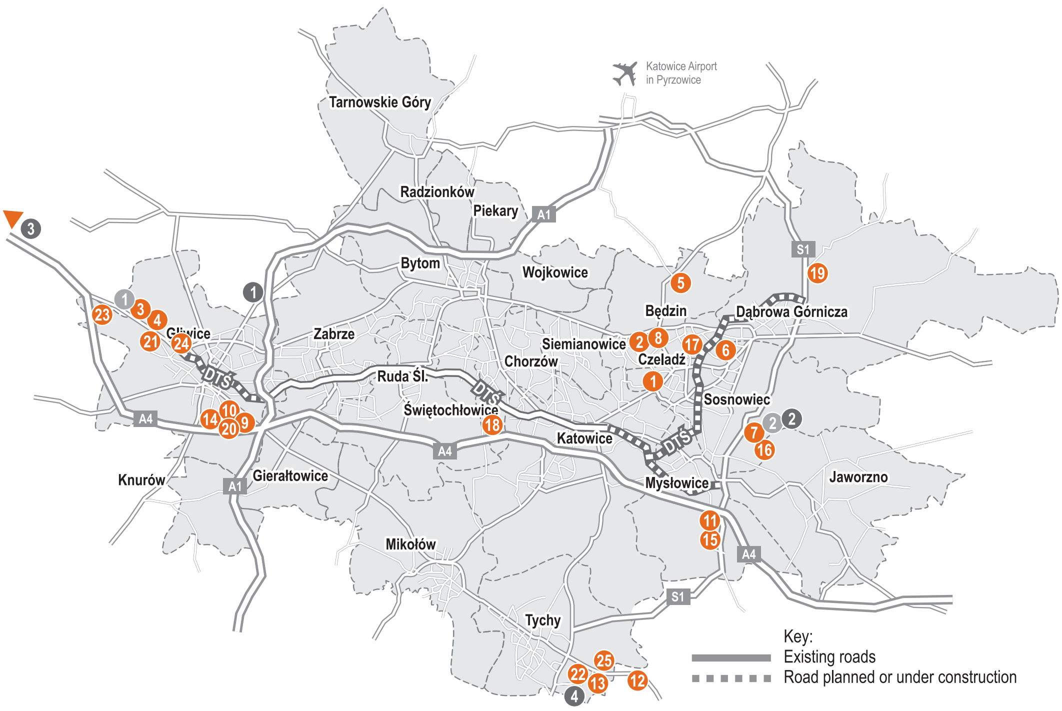
FOR RENT

KEY LEASING TRANSACTIONS Q1-Q3 2015

Tenant	Park	Leased Area (m²)
Motoprofil	Prologis Park Chorzów	24,000
Inter Cars	Goodman Sosnowiec Logistic Centre	17,500
Nowakowski	Silesia Logistic Park	17,000
Raben	Prologis Park Chorzów	12,400
JAS FBG	Panattoni Park Czeladz III	10,600
EUROCASH	Prologis Park Będzin II	10,300
JAS FBG	Panattoni Park Czeladź II	10,000
Zarys	Goodman Gliwice Logistics Centre	10,000
Nagel	Logicor Gliwice I	10,000

MAJOR WAREHOUSE PARKS

Property	City	Owner	Size (m²)
Prologis Park Chorzów	Chorzów	Prologis	235,000
Prologis Park Dąbrowa	Dąbrowa	Prologis	144,000
Logicor Mysłowice	Mysłowice	Blackstone	143,000
SEGRO Logistics Park Gliwice	Gliwice	SEGRO	141,800



● Major Existing Warehouse Developments

1. 7R Logistics Park Sosnowiec
2. Alliance Silesia Logistics Center
3. BTS Decathlon
4. Diamond Business Park Gliwice
5. Distribution Park Będzin
6. Distribution Park Sosnowiec
7. Goodman Sosnowiec Logistics Centre
8. Logicor Czeladź
9. Logicor Gliwice I
10. Logicor Gliwice II
11. Logicor Mysłowice
12. MLP Bieruń
13. MLP Tychy
14. Panattoni Park Gliwice II
15. Panattoni Park Mysłowice
16. Panattoni Park Sosnowiec
17. Prologis Park Będzin II
18. Prologis Park Chorzów
19. Prologis Park Dąbrowa
20. Prologis Park Gliwice BTS Tesco
21. SEGRO Business Park Gliwice BTS
22. SEGRO Industrial Park Tychy
23. SEGRO Logistics Park Gliwice
24. Śląskie Centrum Logistyczne
25. Terminal Logistyczny Promont Tychy

● Under construction

1. Goodman Gliwice Logistics Centre
2. Panattoni Park Sosnowiec

● Planned

1. MLP Zabrze
2. Panattoni Park Sosnowiec
3. Prologis Park Ujazd
4. SEGRO Industrial Park Tychy II

MILESTONE INVESTMENTS IN SILESIA

The Silesian Museum (new building) Katowice
(2015)

The Silesian Museum is a newly built cultural complex located on the site of a former coal mine in Katowice.

With the adjacent buildings and institutions, it creates an emerging centre for the region.

Most of the museum exhibitions are located in the underground halls, while the above-ground facilities (old industrial buildings and mining machinery) have been enriched by the addition of glass buildings.

NOSPR Katowice (2014)

NOSPR is the headquarters of the National Symphonic Orchestra of the Polish Radio in Katowice.

Located on a former mining site, close to the Silesian Museum (mentioned above) and the ICC (described below), the development includes two concert halls (a large one with 1,800 seats and a smaller one seating 300) and several complementary rooms offering additional services.

The International Conference Centre Katowice
(2015)

The ICC in Katowice is a multifunctional, complex service facility designed for congresses, conferences, exhibition fairs and performances.

The scheme is located right next to the Spodek arena complex and other cultural facilites (described above).

Both buildings (ICC and Spodek) include several halls and facilities suitable for organizing both business and sporting events.

MILESTONE INVESTMENTS IN SILESIA

New Exibition and Sports Arena in Gliwice

A new exhibition and sports arena is currently under construction in Gliwice. It will include a main hall, training halls, a spa and parkings. The complex will be able to host different sporting events, e.g. hockey, tennis, volleyball, basketball, handball, etc, and to seat a total of 16,600 spectators; it will be one of the most modern arenas in southern Poland. A similar scheme is located in Kraków, Tauron Arena, which opened in 2014 and has a capacity of 15,000 spectators.

Re-development of Nowe Gliwice

The Nowe Gliwice project is an interesting example of industrial re-development in Silesia.

Post-industrial areas are gradually recultivated and transformed for new purposes. In this case new office buildings are built. A number of high-tech sector companies are operating in this complex, e.g. Flytronic, Future Processing, FIS-SST and Inifinite Dreams.

Old historical buildings (marked with red roofs on the photo) are used for educational purposes, e.g. by Gliwicka Wyższa Szkoła Przedsiębiorczości.

The Citizen Brewery (Browar Obywatelski), Tychy

The Citizen Brewery is a new name for a re-development project located to the west of the railway station in Tychy. Originally the buildings were used for production of beer and during the interwar period the brewery produced 40–50 hl per year.

In 1945, the brewery was nationalized and became part of the Tyskie Brewery. Production was carried on until the '90s, when the decision was taken to close the facility and sell it to private investors. The buildings are currently being re-developed into business, cultural and entertainment centres.

SILESIA'S KEY COMPETITIVE ADVANTAGES

Why Silesia?

The largest **metropolitan area with a strong** consumer market and close to Poland's second **largest agglomeration (Kraków)**

The manufacturing heart of Poland

Special economic zones

Well-developed infrastructure

Close to the consumer markets of the Czech Republic and Slovakia

Maciej Gwóźdź
Vice President TRW Steering Systems

"TRW has been in Silesia for more than 15 years. During that time, Silesia has undergone a significant transformation, leaving its heavy industry legacy behind and becoming a centre for the automotive sector, with the Katowice Special Economic Zone as the main investment hub. The technical, social and educational infrastructure has been completely reorganized and local authorities have become more aware of the needs of business.

These transformations have positively affected our company's operations in the region: so far we've finished six investment projects, employing more than 6,000 people.
Our confidence to the development potential was shown once again by the opening of our engineering center in Silesia. The centre will be focused on product development, employing numerous engineers with various specialties."

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