

INVESTMENT AREAS INFO MAGAZINE

**SPECIAL
EDITION**

Investment Areas | Investors | Real Estate | Special Economic Zones | Experts

in Poland

02
2019

8 POLISH CITIES THAT ARE THE MOST POPULAR WITH INVESTORS

**MORE EXPENSIVE LAND
MEANS MORE EXPENSIVE
HOUSING FOR DEVELOPERS
AND BUYERS**

**POLSKA
WERSJA
OD STRONY 34**

**PIZ OPERATION
AFTER LESS THAN
A YEAR**

**FINDING NEW LAND
THE BIGGEST CHALLENGE
FOR DEVELOPERS**

**INVESTMENT
ATTRACTIVENESS
OF EUROPE**

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8 polish cities that are the most popular with investors

The labor market experts at Antal have come together with Cushman & Wakefield and Vastint, who contributed their knowledge of infrastructure and real estate, to prepare the second edition of the Business Environment Assessment Study (BEAS) series of reports providing an in-depth assessment of the business environment of eight Polish cities along with hard market data on their investment potential.

The reports are based on opinions expressed by decision-makers, i.e. chairmen, members of the board and department directors, of companies operating in the Polish market. We analyzed eight factors that make cities more attractive and contribute to their investment potential. Those factors include: infrastructure, labor market indices, educational potential, quality of living and public administration support. Respondents were asked to rate the quality of the business environ-

ment in their cities on a scale of 1 to 10. The reports were supplemented by hard market data (on living costs, office rents and salaries) delivered by: Antal, Cushman & Wakefield, Vastint, ABSL, the Central Statistical Office of Poland and the National Bank of Poland.

– The business environment has a big impact on the growth of organizations. Factors such as infrastructure and office space potential

translate directly into financial performance. Availability of human capital, high competitiveness, a well-developed business environment, innovative solutions and products are no less important. All of the above factors come together to create a new investment environment that is outlined in our 8-part series of reports on the investment potential of Polish cities – emphasized Artur Skiba, Antal Chairman and Vice-President of the Association of Employment Agencies.

REAL ESTATE

Two major strengths of Polish real estate: unconventional offices and attractive pricing.

The following factors were taken into consideration when analysing real estate attractiveness in each city: public transit access, office space quality, office space availability, quality of additional amenities in the building or in its close vicinity, office space attractiveness. Depending on the type of investment you are considering, it is advisable to choose the city that scored highest in those areas that are the most important from your perspective. Some organizations will prefer low rent, whereas others will be willing to pay more for creative interior design.

LEADERS IN THE „REAL ESTATE“ CATEGORY	
LUBLIN	8 out of 10
TRI-CITY	4 out of 10
KRAKÓW	2 out of 10

– Lublin has once again proven its status as one of the most investor-friendly cities in Poland. Lublin is a great choice for companies that wish to lower operating expenses as it is approximately 20%-30% cheaper to do business there than in Central or Western Poland. Yet, prospective investors usually expect more than just being able to operate on the cheap. Business environment, office quality and availability of amenities that have a positive impact on the quality of living are all considered important and I am happy to say that Lublin delivers in all of those areas. – said Agnieszka Gulaś, Negotiator in the Office Space Department, Cushman & Wakefield.

Investors wish to find the best offices at the lowest possible price, thus striking a balance between rent and quality. Office rents in Polish regional cities range from 13.30 EUR per square meter per month in Szczecin, through 14.75 EUR/square meter/month in Wrocław, to even 23.75 EUR/square meter/month in Warsaw.

– The future looks bright for the office market. The total supply of office space in Warsaw and Poland’s regional cities is estimated to be approximately 10 million square metres, making Poland the CEE leader and one of Europe’s fastest-growing markets. It is worth noting that demand for offices in leading regional cities is growing, mainly due to the ongoing expansion of business services companies. The BPO, SSC, IT and R&D industry generated almost 60% of last year’s demand for offices in local markets (outside of Warsaw) and 30% of demand in all markets. – explained Radosław Kostka, Acquisition Manager, Vastint Polska.

INFRASTRUCTURE

Comfortable and quick travel essential for investors.

Poland is rapidly expanding its transportation networks, including roads, railroads, airports and seaports, which is greatly appreciated by investors. Some cities have certain features that make them stand out. For example, Tri-City’s direct access to Poland’s biggest seaport is a major advantage that sets it apart from the country’s other big cities. Others, e.g. Warsaw, are well-connected to the national transportation network. Despite placing outside the top-three cities in terms of real estate, Łódź received the highest scores in the international road connections (8.6 out of 10) and rail transportation (7.9 out of 10) sub-categories.

LEADERS IN THE „INFRASTRUCTURE“ CATEGORY	
TRI-CITY	7.4 out of 10
KRAKÓW	7.2 out of 10
POZNAŃ	7.1 out of 10

BUSINESS POTENTIAL

A positive business environment is essential for both local entrepreneurs and foreign investors. Data collected by the National Bank of Poland proves that Poland is doing well in this regard with a 20% growth in FDIs in 2018. Poland’s competitive advantages include a qualified workforce, numerous sub-suppliers and, consequently, a robust business infrastructure. Our report also includes an analysis of competition in the local market (where 0 means that there is no competition, and 10 means that practically all competitors are active in the local market). Do note that locations with little competition offer the biggest growth opportunities for investors.

LEADERS IN THE „BUSINESS POTENTIAL“ CATEGORY	
WROCLAW	7.8 out of 10
WARSAW	7.6 out of 10
KRAKÓW	7.3 out of 10

HUMAN CAPITAL

Availability of talent

The condition of a region’s labor market is determined by a number of factors. Prospective investors take into consideration the region’s higher and vocational educational potential (number of institutions, quality of education). One of the most important figures that should be accounted for is the number of students in a given field, which may be used to gauge the supply of future workforce. For example, Wrocław has numerous engineering students (17.6 thousand), Poznań specializes in linguistics with over 25.2 thousand students and Warsaw has the most computer science students (over 16 thousand).

Eastern Poland: An investor friendly region



Kamil Żach
Cushman & Wakefield

Eastern Poland continues to attract increasing interest from both Polish and overseas investors. Its cities, including Lublin, Białystok and Suwałki, are gaining favour with logistics and manufacturing firms planning to expand.

The expanding road network in this part of the country supports this region's growth. The completion of the new sections of expressways, including Via Carpatia, has positive influence on the communication with countries located North and South of Poland, and considerably shortens the journey times between cities - both on the scale of the region and the country.

Availability of low-priced lands is another important factor. Cities that have established themselves as core logistics locations are increasingly experiencing both labour shortages and a paucity of conveniently-located development lands with land prices weighing heavily on project profitability levels. Therefore, further road improvements will increase the attractiveness of many development sites in eastern Poland as an investment destination. It can be assumed that some of the investment lands in the centres treated by investors as priorities will be largely developed until the opening time of Via Carpatia route next to which the areas might be considered an interesting investment opportunity in the future.

Eastern Poland is also likely to benefit from recent amendments to legislation on special economic zones. The concept of "extending economic zones to the whole of Poland" may open up growth opportunities for a number of areas in the eastern part of the country. Land availability and prices, the local labour market and convenient business locations are likely to encourage companies to begin business activity in areas where such activity was recently thought to be unprofitable.

Actual demand for lands in the Eastern Poland represents a small percentage of the entire Polish warehouse market. Taking into account the above-mentioned aspects, this trend will change quickly.

LEADERS IN THE „EDUCATIONAL OPPORTUNITIES DEFINED AS THE SUPPLY OF FUTURE EMPLOYEES“ CATEGORY:

KRAKÓW	8.6 out of 10
TRI-CITY AND LUBLIN	7.9 out of 10
WARSAW AND WROCŁAW	7.8 out of 10

EMPLOYMENT POTENTIAL

The employment potential index reflects the availability of qualified workers in each city. You may wish to examine it closely if your investment will require many engineers or linguists. Our data shows that Lublin has the highest employment potential out of all Polish regional cities. That is due to the fact that Lublin's inhabitants are reluctant to move in search of work. One in five of the city's inhabitants have only changed jobs once throughout their careers, and one in three have been working for the same company their entire life. Contrary to Warsaw, where demand for talent exceeds supply, Lublin has plenty of qualified workers who are ready to accept new job opportunities.

LEADERS IN THE „EMPLOYMENT POTENTIAL“ CATEGORY:

LUBLIN	7.4 out of 10
WARSAW	7.2 out of 10
KRAKÓW	7.0 out of 10

– The modern business services industry, one of the fastest-growing sectors of the Polish economy, plays a very important part in developing the urban architecture of Polish cities. That is why investors often choose locations with an ample supply of finance professionals with foreign language skills and IT professionals. Having access to the best talent in the country, Warsaw, Kraków and Wrocław are also home to almost 50% of Poland's shared services and outsourcing centers. The majority of workers employed in the industry live in those three cities. – explained Karolina Korzeniewska, Account Executive CEE, Antal.

COMBATING AIR POLLUTION, SMART & ECO CITIES. WHAT ARE THE BEST PLACES TO LIVE?

Cities rated in terms of quality of living

Human capital is one of the deciding factors when choosing locations for investment. Worker needs, such as living costs, comfort and location, are growing in importance. Today, a city's cultural life and shopping opportunities also contribute to its business potential. Polish cities run eco campaigns, combat air pollution and do what they can to achieve the status of Smart Cities. Tri-City has the highest quality of living out of all Polish cities and has managed to overtake such cities as Lisbon, Paris and Rome in international rankings.

INVESTMENT OPPORTUNITIES IN SOUTH-CENTRAL POLAND



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Investment attractiveness of Europe. Poland stands out in the region

In 2018, Europe reported 6 356 new direct investments (FDI), according to the annual report “Investment attractiveness of Europe 2019” prepared by EY. Although the number of FDI per annum decreased by 4%, it is the second-best result since 2000



Jacek Kędzior
Managing Partner at EY Poland

In Central and Eastern Europe, there were 1 598 foreign direct investments in 2018 (slightly more in the previous year – 1 621). Poland stood out in the region with 272 investments, taking sixth place in Europe in terms of investment attractiveness.

The number of foreign direct investments in 2018 in Europe fell compared to the previous year by 297. This was caused primarily by smaller in-

vestor interest in the largest European economies, historically attracting most such projects, namely the United Kingdom and Germany, as well as a slight increase in the number of investments in France. Despite uncertainties associated with Brexit and trade principles between the UK and the European Union, the United Kingdom still records the largest number of foreign investments (1 054 FDI). Looking and historical statistics, the UK recorded the least direct foreign investments

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since 2014. France went up to the second position (1 027 FDI), which for the first time since 2010 was above Germany (973 FDI), pushing it to the last position on the podium.

– According to our study, Western Europe is once again considered to be the best location for new investments in the world. Importantly, Central and Eastern Europe is second just before North America and China. It should be noted, however, that foreign investors were less willing to invest in Europe than in the previous year, mainly due to concerns about economic and political stability. The issue of Brexit and further trade relations between the UK and the European Union is still unresolved, and the relationship between China and the US is also important. Investors also see a slowdown in economic growth both in Europe and in the world's largest economies. Looking deeper into this year's data, we can also see that attitudes towards Europe are dependent on whether companies already carry out business in Europe. Those entrepreneurs who have not yet invested in Europe, this year are much less likely (by as much as 11 percentage points) to develop their business in this region of the world compared to the previous year. Interestingly, entrepreneurs already present in Europe have not changed their minds about its investment attractiveness over the last year. – says Jacek Kędzior, Managing Partner at EY Poland.

Despite many uncertainties, 56% of investors indicate Western Europe as one of the three most attractive locations for business, which is about 3% more than in the previous year. The next is Central and Eastern Europe (direction indicated by 40% of the respondents). This year, it is ahead of China, which is in the fourth position, just behind North America, with a score of 37%.

Although investors perceive Europe as attractive, serious challenges are facing the Old Continent. Only 27% of the respondents are planning to invest or increase involvement in Europe in 2019. This is 8% less than in the previous year, and the lowers score in 7 years. An increase in the investment attractiveness of Europe is expected by 37% over the next 3 years. This result is clearly worse than in the previous year when the growth of investment attractiveness of Europe in the coming years was expected by half of the respondents.

POLAND STANDS OUT IN THE REGION

In Central and Eastern Europe, there were 1 598 foreign direct investments in 2018 (slightly more in the previous year – 1 621). Poland stood out in the region with 272 investment, taking the first place in Central and Eastern Europe and the sixth place in Europe. At the same time, Hungary reported 101 FDI (15th place) and the Czech Republic with 65 direct investment took the 20th place.

– In this year's ranking of countries with the largest number of foreign direct investments, Poland is among the countries that stood out positively. Poland is the region leader, with the three largest European economies as well as Spain and Belgium ahead. Looking at the sectors that attracted most investments, we can clearly see that nearly half of all foreign direct investments in Poland is associated with automotive components, transport, logistics, manufacturing, and chemical

industry. 13% of all FDI in Poland in 2018 was associated with the sector of business services. – says Paweł Tynel, EY Partner, Investment Incentives and Subsidies Department Leader.

BREXIT REDUCES THE ATTRACTIVENESS OF THE WHOLE EUROPE, NOT ONLY THE UK

As indicated by the study, one of the key elements that influenced the number of investments was economic and political uncertainty. The biggest risk currently affecting the investment attractiveness of Europe is Brexit. A year ago, it was mentioned as the fourth greatest threat, and this year it took the first place and was indicated by 38% of the respondents. Other issues that worry investors are mainly the political instability of the European Union, the rise of populist and protectionist moods, as well as global and regional geopolitical instability.

– When analysing the most frequently cited risks for the European investment attractiveness in recent years, we can see that political issues are most worrying for investors. This year's study shows that also labour issues are important for making investment decisions. 20% of the respondents indicated that the ageing society is a risk for Europe, 15% declares the fear of an economic slowdown in China, and 14% sees the risk in the absence of appropriate skills among potential employees. When companies decide to invest in Europe, labour issues turn out to be extremely important. Access to qualified employees is important or even critical for 90% of companies when deciding on a specific location. Three-quarters of entrepreneurs declare that the absence of adequate staff greatly reduces the efficiency and profitability of business. This is one of the guidelines for Europe for the coming years – countries that will be able to provide access to people with rights skills and qualifications will be able to count on an increase in investment attractiveness. – says Paweł Tynel, EY, Partner, Investment Incentives and Subsidies Department Leader.

EDUCATED WORKERS ARE A CHALLENGE FOR EUROPE

Suitably qualified staff, especially with technological skills, may also provide to be an integral element driving the European economy. That's because 39% of the respondents, when asked about sectors stimulating European growth in the coming years, indicates that it will be the digital economy, which requires appropriate education.

– Europe each year attracts an increasing number of direct investments in the digital sector. In 2018, it was a record, as many as 1 227, which is about 5% more than the year before. There are opportunities for further development of this segment. This will be possible provided that Europe will carry out the necessary investments in digital infrastructure and will train potential employees. This is a challenge not only for governments responsible for the education system but also companies, which should quickly identify and define the skills that will be necessary for the coming years. – says Paweł Tynel, EY, Partner, Investment Incentives and Subsidies Department Leader.

Considering Poland, consider business in Dąbrowa Górnicza

Is your organisation considering a new location for its business activities? Is your organisation considering Central Europe, maybe Poland? Have you already got acquainted with opportunities in the Silesia region, specifically in Dąbrowa Górnicza?

Located in the Silesian Metropolis (2.2 million inhabitants) in the southern part of Poland, Dąbrowa Górnicza is a dynamic city (120 thousand inhabitants) with well-developed social and leisure infrastructure (schools, medical services and hospital, shopping centre, cultural centre, sport centre, aqua park, lakes and the so-called Polish Sahara). One should consider taking part in one of the many cultural events in the metropolis, among which Rawa Blues, Mayday, Off Festival, Górczycki Festival or the Metropolitan Theatre Night, or visit one of the many shopping centres, among which Silesia City Centre, Galeria Katowicka Shopping Centre or Pogoria Centre.

Dąbrowa Górnicza has well-established economic activities in sectors like: automotive and advanced manufacturing (Brembo Poland, NGK Ceramics Polska, SK Innovation, GUHRING Polska, Ficomirrors Poland, Koide Poland, Mecacontrol Polska), steel production (ArcelorMittal Poland, ThyssenKrupp Stal Serwis Polska), chemicals, glass processing (Saint-Gobain Innovative Materials Polska), plastics, logistics (Prologis Park/Fiege, PAGO, Polzug Intermodal) and ICT. The Silesian Metropolis has an excellent transport system, including the S1 expressway connecting Dąbrowa Górnicza to the A1 and A4 motorways, a dense railway network and the Katowice International Airport that handles passengers and cargo. Thanks to this, one can easily get to other European cities on a business trip or for the weekend. Perhaps a short break to relax in the mountains or in one of the many Polish historical cities. A network of international transport connections makes the Silesian Metropolis a key logistic hub, in which Dąbrowa Górnicza plays an important role.

The Dąbrowa Górnicza City supports cooperation between its vocational and technical schools and companies. Dedicated educational courses are

delivered in line with companies' competence expectations. The Complex of Silesian International Schools in Katowice provides a cross-disciplinary, cross-cultural, holistic and humanistic approach to education on the level of preschool, Cambridge Primary Programme, Cambridge Secondary Programme, Cambridge IGCSE programme and IB Diploma Programme. In the vicinity of Dąbrowa Górnicza there are over 40 higher education institutions with yearly 135 thousand students attending courses and 42 thousand graduates entering the labour market.

Kazdębie investment area in Dąbrowa Górnicza is situated in the immediate vicinity of ArcelorMittal Poland S.A and JSW KOKS S.A. Kazdębie is at distance about 11km to the east of the city center. Situated on Koksownicza street, which is on the route no. 780. Close to the investment areas there is a conveyor which once was used to transport iron ore from treatment plant to Katowice Steelworks. These areas are currently being prepared for small and medium enterprises especially. Next year – 2020 – there will be fully prepared twelve "plug&play" plots for investors with areas 0,5ha to 1,2ha.

Should your organisation like to receive more information on the opportunities concerning business activities in Dąbrowa Górnicza, please do not hesitate to contact us.

DĄBROWA GÓRNICZA - CITY HALL

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Finding new land the biggest challenge for developers

The real estate market in Central Europe, including Poland, is constantly evolving. According to the first edition of the “Deloitte Real Estate Confidence Survey for Central Europe (CE)”, prepared by the consulting company Deloitte, the biggest players in the Central European real estate sector are optimistic about the future.

Almost two-thirds of the respondents expect that the economic climate will remain favourable, and 78% believes that the availability of credit will remain unchanged. Nearly 40% expects the appearance of new investment opportunities this year. Office real estate and private dormitories are the most interesting for investors.

The study was attended by representatives of the real estate sector (investors, developers, real estate agencies and other advisers supporting this sector) operating in Central Europe.

Political uncertainty and rising credit costs are just some of the factors affecting world markets. Global economic growth is slowing down and the World Bank changed its forecast for global economic growth from 3% to 2.9%. Increasingly, the question arises whether it is a natural adaptation of the global economy or the beginning of the next crisis. The latest Deloitte study indicates that market players remain positive about the prospects for the economy of Central Europe in the second half of 2019. A clear majority of respondents (62%) expects that the overall economic climate will remain stable, while only 22% holds the opposite view. Almost one-third

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of the respondents, whose main activities are in Poland, expects an improvement in the economic situation, and only one in ten expresses the opposite view.

More than three-fourth of the respondents (78%) expects that the availability of credit will remain unchanged. 11% predicts both negative and positive scenarios.

– Because most of the financing is carried out in euros, such an optimistic attitude can be a reaction to the decision of the European Bank to maintain key interest rates at the current level at least until the end of 2019. – says Maciej Krasoń, Partner, Real Estate and Construction in Central Europe Team Leader at Deloitte.

The vast majority of respondents (84%) also does not expect any significant changes in the tax environment in the region of Central Europe this year. This does not mean, however, that the respondents do not see quite common and complex changes, especially in the Polish tax system.

MARKET ACTIVITY

In the past three years, we have seen an extremely high number of transactions in the region of Central Europe. By the end of 2018, 13.8 billion euro was spent on commercial real estate. Half of these transactions took place in Poland, meaning that our country is still the main destination for investment activity in the real estate sector. The Czech Republic (19%) took the second place, while Hungary (13%) took the third place. The participants expect that overall real estate market activity will remain at a similar level as in 2018.

Opinions on the availability of investment opportunities in the next three years are distributed more or less equally: 38% expect their growth, while 36% expect their decline. Figures for Poland are even more encouraging: 45% expects that the availability of investment products will increase in the near future.

– This optimism is derived from a very good economic situation both in Poland and throughout our region, as well as high resistance to political and economic turmoil in other parts of the world. In addition, high availability of capital and credit means that our region has probably become one of the components of diversified investment portfolios. Central Europe does not work in isolation from neighbouring markets, so Brexit, slowdown in economic growth in Western Europe and Asia probably will affect the future of the industry also in our part of the continent. – says Dominik Stojek, Partner Associate in the Real Estate Advisory Department of Deloitte.

LAND AT A PREMIUM

According to the study, 45% of the respondents are looking for new investments, while 41% wants to focus on managing their existing portfolios. The remaining 14% focuses on raising new funds by the end of the year. When asked about purchase/sales plans, 41%

answered that in 2019 they will purchase and sale real estate in equal proportions, while a similar percentage (38%) declared focusing on sales. The remaining 21% will purchase more than they will sell

It's worth noting that Asian investors did not participate in the survey, who are increasingly looking for new investment opportunities in Central Europe.

For 63% of developers the biggest challenge is to acquire land for development. This is a result of the upward trend in prices and shrinking availability of attractive land.

– The decreasing availability of new plots is forcing investors to verify their existing strategies. One effect of this change is a visible increase in the number of projects aimed at reconstructing the existing buildings. – explains Dominik Stojek, Partner Associate, Real Estate Advisory at Deloitte. For 19%, the rising costs of construction materials and works are an issue, while for 13% financing of projects.

In light of the above responses it is not surprising that more than half of the respondents (56%) expects that developers' margin will fall this year. This may result in a decrease in the number of new projects and rising prices for tenants, investors and individual customers.

THE MOST PROFITABLE SEGMENTS

The sector of office real estate will draw attention of investors. Almost one-fourth of the respondents will focus on it, while 13% and 6%, respectively, will focus on trade and logistics. 62% of the respondents predicts that the profitability on the office real estate market will remain unchanged. Last year, transactions on this market generated approximately 5.6. billion euros. The largest of them was the acquisition of two office buildings in Gdańsk Business Centre by Savills IM for about 200 million euros in 2018. The highest rents for office space are recorded in Warsaw and Budapest (21-25 euros) and in Prague (21 - 22 euros).

Investors are less enthusiastic about commercial real estate – only 7% of them intend to increase their investment activity in this market segment. This is due to the growing role of electronic commerce, which dynamically increases its volume, at the same time stimulating further development of the logistics sector. In Poland, an important factor affecting the potential investors' decision is the Sunday ban on trading. Another reason for a less enthusiastic approach to the retail sector can be a relatively high level of saturation of retail space in the main regional markets. For example, the rate in Poland is about 386 square meters per 1000 inhabitants, and in larger cities it can be up to two times more. This encourages developers to focus on smaller cities and remote locations.

Rapid economic development in the region stimulates demand for new business hotels. In addition, such cities as Prague and



Turek



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4 Jedwabnicza Str., 62-700 Turek, POLAND, P: +48 63 222 38 81, E: invest@miastoturek.pl, www.inkubator.turek.pl

Budapest are well-known tourist areas, so it is not surprising that investors are interested in the hotel and leisure sector. Warsaw, Kraków, Gdańsk and Wrocław attract more and more tourists, stimulating the Polish hotel industry. The participants also pointed out investment in student housing as a niche, which can be an interesting alternative to other investments.

– The student market is still very small, but it has interesting prospects given the growing number of students. Several private dorms have already been constructed, while several others are planned

in Warsaw, Prague and other cities in the region. – says Maciej Krasoń.

A key challenge in the housing sector may be a growing gap between the purchasing power of the population and rising prices in the primary market, leaving little room for price increases. Another issue is related to labour costs, driven by the low unemployment rate and an increase in average wages. Decreasing availability of plots and rising construction and work costs may reduce profits for developers. However, despite these challenges, the continued strong demand for apartments encourages them to take on new projects.

WILL LAND EXEMPTION FROM AN AGRICULTURAL USE INCREASE THE SUPPLY OF LAND FOR HOUSING AND CALM PRICES?



Amendment of the Act will not matter much for developers. In the 20-year history of our company, once or twice there was a situation when agricultural lands appeared in our land bank. Usually, with the development and expansion of cities, agricultural parcels are reclassified into construction parcels. Developers decide to buy agricultural lands when cities are behind. When it comes to the size of plots, most of those bought by us are from 1 to 5 thousand sqm. and in the entire industry purchases of plots larger than 1 hectare rarely happen.

Andrzej Gutowski
Ronson Development Vice President



The surface of one hectare, particularly in the area allowing for multifamily housing, is sufficient event for larger projects, including staged projects. Land exemption from an agricultural use can have a positive impact on the investment land market, even though developers who previously invested in agricultural lands found solutions to carry out their investment without changes in the law. When it comes to current prices on the market, for a long time we see the growing expectations of land owners. Offer prices less frequently reflect the investment potential of plots and so it is difficult to purchase them at a reasonable price.

Monika Perekitko
Member of the board at Matexi Polska



Any possibility of increasing the availability of land for construction will be good for developers. Due to limited number of plots, smaller and larger areas are being considered. We are looking primarily for land in good locations in Warsaw, so the prices of such plots are usually higher and parcels are difficult to obtain.

Janusz Miller,
Director of Sales at Home Invest



Koszalin in numbers

Residents: 107 321

Working age people: 62 239

Location: northwestern part of Poland, West Pomeranian Voivodeship.

Trusted us / already invested:

- Jeronimo Martins Polska
- Rotho,
- James Windows Sp. z o.o.
- "Q4Glass, ABJ Investors" Sp. z o.o. Spółka Komandytowa
- Fabryka Flag "LINEA" Milena Trojanowska
- Centrum Logistyczne Invena Log Sp. z o.o. Sp.k.

Advantages:

- Excellent location and transport accessibility
- Full technical infrastructure of investment areas including the "Koszalin" Subzone of the SSEZ
- Plot size adapted to the investor's needs.
- No investment barriers.
- Preferences and tax benefits when obtaining a decision to support new investments
- Permanent contact and assistance of a representative of the Office
- Close to the Sea
- Friendly climate and permanent contact with investor till launching plant
- Well qualified future staff and low work costs
- Opportunity to establish cooperation with science
- Assistance in searching for employees.

INVESTMENT AREAS OF THE „KOSZALIN” SUBZONE SSEZ

area 150 ha, including 68 ha for development

Area I

Location: "Koszalin" Subzone of the SSEZ Plot No. 9/67

Area: 4,1553 ha

Designation in the local planning: production facilities, warehouses

Approximate land price: from 67 PLN/m²

Percentage of permissible development: 65%

Media:

Gas	Calories	31,0 MJ/m ³
	Capacity	1.000 m ³ /h
Water	Capacity	5.000 m ³ /h
Sewage	Capacity	5.000 m ³ /h
Electricity	Voltage	15 kv
	Power	Up to 31 MW

Area II

Location: "Koszalin" Subzone of the SSEZ Plots 9/58 and 9/59

Area: 4,6029 ha

Designation in the local planning: production facilities, warehouses

Approximate land price: from 68 PLN/m²

Percentage of permissible development: 65%

Media:

Gas	Calories	31,0 MJ/m ³
	Capacity	1.000 m ³ /h
Water	Capacity	5.000 m ³ /h
Sewage	Capacity	5.000 m ³ /h
Electricity	Voltage	15 kv
	Power	Up to 31 MW

MORE INFORMATION IS AVAILABLE AT: WWW.KOSZALIN.PL, WWW.INVESTINKOSZALIN.PL

Contact:

MUNICIPALITY OF KOSZALIN

75-007 Koszalin PL, Rynek Staromiejski 6-7

Piotr Jedliński

Mayor of Koszalin

Phone : (+48) 94-348-86-03, Fax : (+48) 94-348-86-25

Joanna Piotrkowska-Ciechomska

Mayor's Representative in charge of Key Investors and Employment

Phone : (+48) 94 348 87 93, Fax : (+48) 94 348 87 92

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More expensive land means more expensive housing for developers and buyers



Robert Korczyński
Board Member at Emmerson Evaluation

Rising prices of land for multifamily housing are one of the main drives of growth in rising housing prices in Poland. In 2018, in the most attractive districts of Warsaw and Wrocław, their prices went up by up to 20% per annum. Given rising construction costs, it is more and more difficult for developers to achieve profitable margins on investments. It is a real problem. In the past year, part of land transactions was not finalized.

In a report on investment land designated for multifamily housing, Emmerson Evaluation analysed the markets of the largest Polish cities with the most developed developer markets. The report assumed the actual selling prices of land for the transactions made in 2018, collected in the proprietary database Evaluator, presented in terms of the price of 1 sqm. of residential usable area (RUA). This is an index which refers to potential construction possible to carry out on the land. The analysis showed that in the majority of cities included in the report, land prices increased.

Emmerson Evaluation recorded the largest increases in Warsaw and Wrocław. The most stable prices remained in Kraków and Szczecin. The most expensive lands were sold in Warsaw, Kraków and Tri-City. According to the report, the average price of 1 sqm. of RUA in those cities in 2018 amounted to 2100, 1650 and 1500 PLN, respectively. The lowest price for investment land had to be paid in Łódź, where on average it reached 650 PLN per sqm of RUA.

The poorest offer of land available for sale was in Kraków and Sopot. The largest availability of land for development could be observed in Szczecin and Łódź.

DEVELOPERS BUILD DESPITE OBSTACLES

High scores in housing sales encouraged and continue to encourage developers to implement new investments and thus to purchase new land for this purpose. However, not all of their plans and projects come to fruition. The growth dynamics of construction costs led to the fact that many transactions from 2018 were not finalized. Given their high prices and rising construction costs, developers must raise the prices of apartments to achieve profit margins at a satisfactory level.

– Investors who have large land banks are in the best situation. Smaller developers are exposed to a high risk of not achieving



the projected return on investment. –notes Robert Korczyński, board member at Emmerson Evaluation.

Due to the lack of attractive investment lands in acceptable prices, developers are investing more and more boldly in post-industrial lands, requiring e.g. remediation, or in properties protected by conservation, or even in real estate with legal issues, suggest Emmerson Evaluation experts. Such lands, due to investment risk, have low prices. But now they are also becoming more expensive.

According to the data collected in the report “Land for multifamily housing”, the average share of price of land in the total value of investments in cities such as Warsaw, Tri-City, Kraków slightly exceeds 20%, while in the most expensive locations it can even reach 37%. In Wrocław or Poznań, share price of land in the value of the total investment amounted to an average of 16%. The lowest level was noted in Łódź and Szczecin – an average of 13% and 14%.

LAND WILL BE OF VALUE

Emmerson Evaluation predicts that by the end of 2020 the price of land for multifamily housing will still grow, but the pace will be much slower than before. The key for land prices will be the situation in the construction market and the propensity to accept increases in housing prices by buyers, according to the analysts.

– We also expect that more and more land transactions where developers will implement “brownfield” type investments will appear. Among smaller developers, we expect more interest in premises located in the vicinity of large cities. This, in turn, will increase prices in these areas. The biggest players will remain interested in large investment areas, where several hundred apartments can be created. Given the scale of investment, it gives them the opportunity to gain profit at a high level. – says Robert Korczyński from Emmerson Evaluation.



The largest office investments in the country are emerging not only in Warsaw

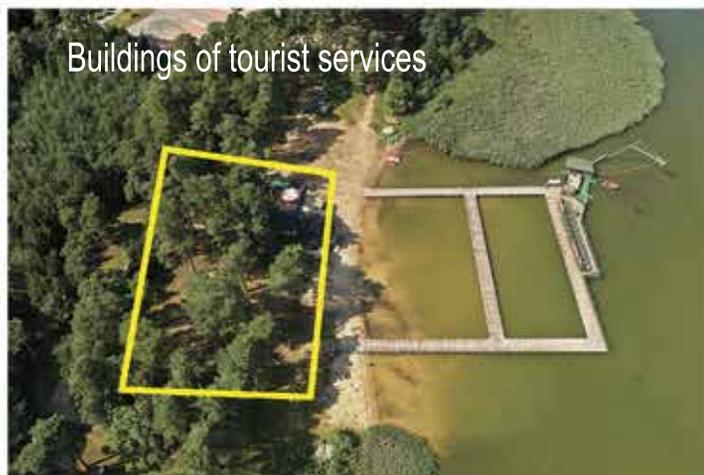
Developers are taking advantage of a great economic situation on the office market launching large investments in the biggest cities in all regions of Poland .

Boom in the office segment continues. According to Walter Herz analysts, in the first half of the year, over 300 thousand sq m. of office space were leased in the largest business centers in the country, outside Warsaw. It is a better result than the one last year, when in the corresponding period 260 thousand sq m. of offices were leased. Cracow holds the leading position in the regions, with almost 140 thousand sq m. of contracted space.

– Demand for offices in the regions is generated mainly by modern business services sector. The companies representing these industries share in lease is at the level of 40 - 50 per cent, depending on the city. The dominant group are the IT companies . – says Mateusz Strzelecki, Partner and Head of Regional Markets at Walter Herz. – Flexible space operators have also joined the group of significant tenants in the regional markets. Their participation in lease is growing both in Warsaw and in other cities.

AUGUSTÓW (Poland) – the best place to live, develop ... and invest!

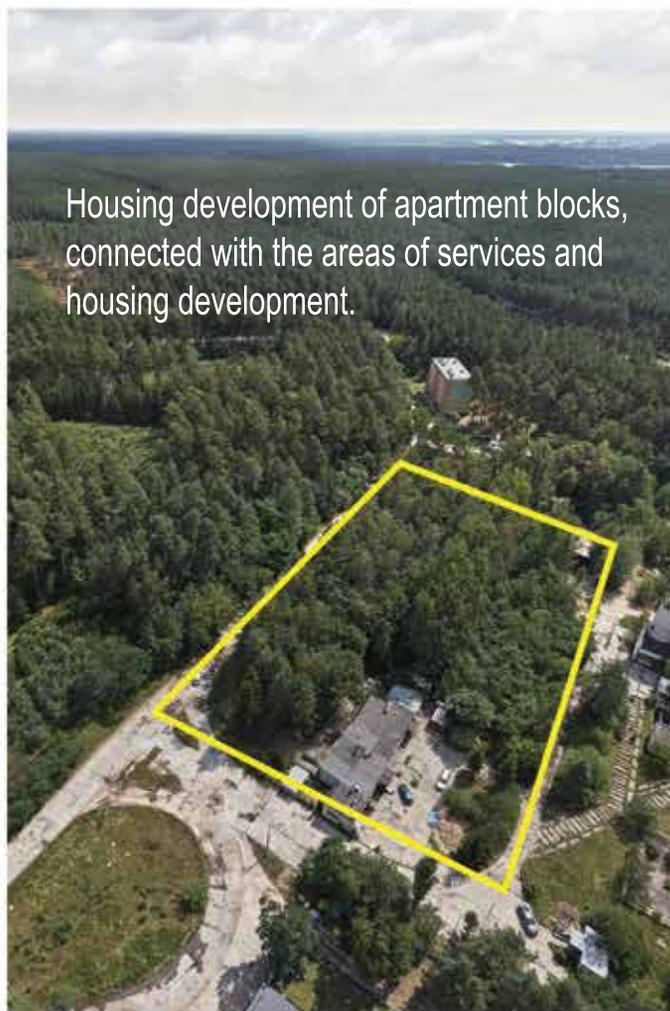
Augustów is also a great place to locate business due to its cross-border location; the proximity to Lithuania or Belarus.



Buildings of tourist services



Buildings of tourist services, buildings of non-incumbering services particularly connected with sport and leisure.



Housing development of apartment blocks, connected with the areas of services and housing development.

We are offering attractive property tax exemptions for entrepreneurs starting and developing their businesses in Augustów - Special economic zone in Augustów - 13 ha, investment areas on Wojska Polskiego Str.



AUGUSTÓW

Augustów is the best place to invest in Poland.
Come to Augustów - see for yourself!

www.panorama.augustow.pl

www.urzad.augustow.pl

In Cracow, in the first half of the year, companies from this sector generated almost 10 per cent demand for offices. – adds Mateusz Strzelecki.

The largest facilities completed in the first six months of the year on regional markets include Business Garden and Nowy Rynek B in Poznań, Brama Miasta B in Łódź, and V.Offices and Fabryczna Office B1 in Cracow.

CRACOW IS THE FASTEST-GROWING MARKET

Investment enthusiasm in the office real estate segment is not diminishing. Developers are still working hard on increasing resources in the largest business centers in Poland. According to Walter Herz analysts' calculations, a total of almost 850 thousand sq m. of modern office space is now being built in the regional markets, and a similar number of offices are under construction in Warsaw. According to Walter Herz, most investments are carried out in Cracow, where around 230 thousand sq m. is currently under construction.

Cracow, which is a leader in the regions and second largest office market in Poland, will maintain its position in the near future. Thus, leading investors in the country are preparing their next large projects here. Cavetina is to build Klimeckiego Office complex offering over 35 thousand sq m. in the capital of Małopolska, and White Star is to implement The Park investment, which will generate 100 thousand sq m. of office space. Echo Investment is also to announce a new Cracow project.

Cracow market showed the largest increase in resources in the first half of this year. During that time, Cracow's office space resources have increased by about 100 thousand sq m. of space. In the second half of the year, developers are planning to commission another 70 thousand sq m. of offices in Cracow. The market will gain, among others, Tischnera Office complex with 33.6 thousand sq m. of space.

IN WROCŁAW AND THE TRI-CITY, THE CONSTRUCTION IS NECK AND NECK

In Wrocław, where resources currently exceed 1.1 million sq m of office space, there are 220 thousand sq m. of offices under construction. Nowy Targ office building with around 21 thousand sq m. of offices and West 4 Business Hub project, which will offer a total of over 80 thousand sq m. of space, are under construction in the capital of Lower Silesia. Business Garden investment is also emerging in the city, which is the largest office project carried out outside Warsaw, offering 117 thousand sq m. of modern office and commercial space. Cu Office complex with 23.5 thousand sq m. of offices is under construction in the Wrocław agglomeration, as well as City 2 office building with 12 thousand sq m. of space and Centrum Południe investment, with five buildings offering about 85 thousand sq m. of space for lease.

According to Walter Herz, in the Tri-City, which is currently offering almost 800 thousand sq m. of offices, around 210 thousand sq m. of office space is in the implementation stage. The largest market players, such as Skanska (Wave complex) and Polski Holding Nieruchomości (Marina Office) are investing in the region. Later this year, Neon - the last office building in the Alchemia complex in Gdańsk Oliwa, which will provide over 35 thousand sq m. of offices, will be commissioned in the Tri-City. As part of 3T Office Park complex, three towers will be built in the agglomeration with a total lease area of 38 thousand sq m.

THE LARGEST COMPANIES ARE INVESTING IN KATOWICE AND ŁÓDŹ

In Katowice, such investments as Global Office Park (58 thousand sq m.) by Cavatina company and Silesia For Business (40 thousand sq m) by TriGranit company are to emerge in the near future.

According to Walter Herz analysts' predictions, over 70 thousand sq m. of space is to be delivered in projects to be completed in the second half of this year in Łódź. Office building in the first stage of Brama Miasta (27.8 thousand sq m) by Skanska has recently been completed. In addition, next expected office openings are Imagine (17 thousand sq m) and the first building in the Monopolis complex.

In the Łódź agglomeration, another building of Brama Miasta and Hi Piotrkowska 155 complex (21 thousand sq m) are also under construction. On the site of the former Karol Scheibler factory, Echo Investment is building a mixed-use Fuzja project (90 thousand sq m), and in REACT office complex, nearly 50 thousand sq m. of space is soon to be

commissioned. Ghelamco's P22 investment and HB Reavis' project in Nowe Centrum Łodzi are also awaiting the beginning of the construction in Łódź.

LESS AND LESS VACANT OFFICES

Due to the increased investment activity, regional markets in Poland already provide a total of 5.35 million sq m. of office space. Nearly 1.4 million sq m. is located in Cracow.

According to Walter Herz, in the largest regional cities, on average over 9 per cent of offices are waiting for tenants. In most facilities, the vacancy rate continues to drop. The least vacant space is in the Tri-City - about 5.5 per cent. In Cracow, which is developing the fastest, the vacancy rate reaches 10 per cent. Tenants, however, are eagerly signing pre-lease contracts there, thanks to which, despite the large new supply, the number of vacant space will remain unchanged.

In the largest cities in the country, rental rates are slowly going up. The main reason of the increase in rental prices is growing costs associated with the implementation of new facilities.

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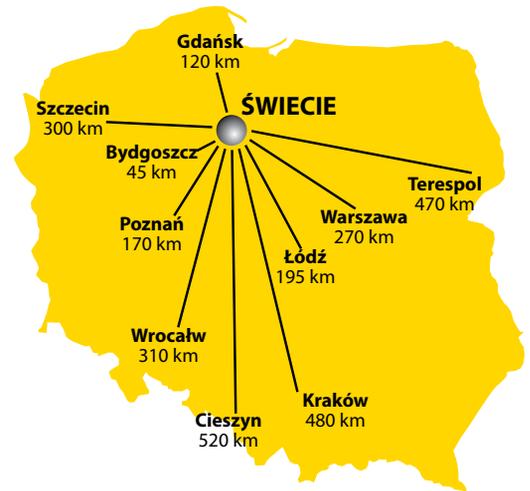


Świecie is a rapidly developing community in the Kuyavian-Pomeranian Voivodship with a population of 34.000. It is one of the most important economic centers of Northern Pomerania.

It is also home to several large plants, among which include paper, metal, food and agriculture, along with many building, finance, service and trading companies.

The town boasts a well developed infrastructure and also stands as an important transportation node, where national routes 91 and 5 intersect. In addition to that, Amber Highway (A1) is only 13 kilometers away.

For several years now, Świecie has been creating and developing some unique business conditions for the purpose of economic development. 35 ha of land at the SEZ Vistula Park I, have been improved for that purpose.



Vistula Park I



Vistula Park II

WIELKI KONOPAT - INVESTMENT AREA

OFFER:

- One of the most attractive investment area in the north of Poland
- Co-financing from Phare 2003 fund
- The site is located near to the national highways number 5 and number 1. The site is located 13 km from A1 motorway junction Nowe Marzy
- The site is owned by Świecie Commune

INFRASTRURE:

- Internal roads
- Water supply lines
- Telecommunication lines
- Gas supply lines
- Rain water disposal lines
- Power supply lines
- Sewage disposal system
- Parking area
- Lighting system

LAND COST:

- Monthly rent is 970 PLN/ ha (net price)
- There is an opportunity to purchase the land after the expert's calculation
- Total area 35ha. On that area 17 companies exist.
- Reserved area 22,52 ha. Available area 12,48 ha

SULNOWO - INVESTMENT AREA

OFFER:

- The site is located near to the national highways number 1. The site is located 14 km from A1 motorway junction Nowe Marzy
- There are well qualified workers in Świecie Commune
- The site is owned by Świecie Commune

INFRASTRURE:

- Water supply lines
- Telecommunication lines
- Gas supply lines
- Sewage disposal system
- Power supply lines

LAND COST:

- Monthly rent is 970 PLN/ ha (net price).
- There is an opportunity to purchase the land after the expert's calculation.
- Total area 19,52 ha.
- Reserved area 7,35 ha.
- Available area 12,17 ha.

www.swiecie.eu



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Good times for office tenants in Łódź

Łódź's office market has been well-balanced in terms of demand and supply for several years. According to „Occupier economics: Office market in Łódź Q1 2019”, a report published by real estate advisory firm Cresa, the office stock of the Łódź market has increased by nearly 8% year-on-year and amounted to 471,200 sqm at the end of Q1 2019. Take-up in the first quarter of 2019 reached 15,100 sqm, up more than 50% on the same period in 2018.



Marta Pyziak
Head of Łódź Office, Cresa Poland

The existing state of the market equilibrium will probably change in the coming months with the delivery of several new office projects which still have considerable volumes of vacant space.

– Łódź continues to attract tenants who in the current market situation are able to secure more favourable lease terms. In addition, the growing competition is forcing the owners of older office buildings to increase capital expenditure to retain tenants. – says Marta Pyziak, Head of Łódź Office, Cresa Poland.

The first quarter of 2019 saw only one completion: Sepia Office (2,300 sqm, OPG Property Professionals). Another 60,000 sqm is expected to be added to Łódź's office stock by the end of this year.

Take-up in the first quarter of 2019 reached 15,100 sqm, up more than 50% on the first quarter last year. New leases accounted for half of the leasing volume, with renegotiations and expansions making up 43% and 7%, respectively. The largest transaction was renegotiation and expansion of Flint Group in Łódź I Infosys office building (3 350 sqm.).

– Office absorption hit 9,800 sqm in the first quarter of 2019, up by more than 10,000 sqm on the previous year's level. By comparison, quarterly absorption in the years 2017-2018 averaged approximately 11,000 sqm. As on most markets across Poland, absorption in Łódź is expected to remain on a growth path but will be below developers' expectations. – says Bolesław Kołodziejczyk, PhD, Head of Research & Advisory, Cresa Poland.

The city's vacancy rate stood at 7.0% at the end of the first quarter, down by 1.7 pp on the previous quarter and down by 2.6 pp compared to where it was a year ago. Asking rents currently stand at EUR 11-14 sqm/month in upper class buildings, and EUR 7,5-9,5 sqm/month in lower class buildings.

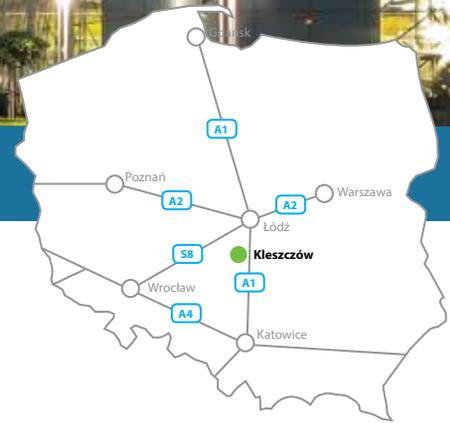


COMMUNE OF KLESZCZÓW

A PLACE FOR YOUR INVESTMENT



www.kleszczow.pl



The Commune of Kleszczów is situated in central Poland, in the southern part of the Łódź Voivodeship, in the County of Bełchatów, near the Warsaw - Wrocław and Katowice - Gdańsk transport roads.

The Commune of Kleszczów is the most industrialized part of the Łódź Region. Entrepreneurs from Poland, Germany, Finland, Austria, France, the Netherlands, Italy, Portugal, Switzerland and Spain located their factories and workshops in the four Industrial Zones in Rogowiec, Kleszczów, Żłobnica and Bogumiłowo.

The overall area of investment lands amounts for more than 200 hectares, where investors can carry out their operations upon preferential conditions, making use of:

- attractive land prices - 15 zł/m²+ VAT
- electrical energy and other media prices lower than in other communes
- employees training and recruiting assistance
- developed road network
- tax reliefs offered by the Łódź Special Economic Zone
- privileges offered by the Łódź Special Economic Zone
- formal and legal assistance

The lands located in the industrial zones belong to the Commune of Kleszczów Development Foundation (pol. Fundacja Rozwoju Gminy Kleszczów), which aims at attracting investors and the promotion of a communal investment offer.

A serious help for the development of small and medium companies provides the Entrepreneurship Incubator of Kleszczów that offers entrepreneurs a service named „Virtual Office”. Thanks to

this service they get company's seat address and other additional possibilities, such as access to a conference room or to office space.

The magnet that attracts investors and new citizens of our commune is infrastructure - created to serve the local community. The high level of a medical care, perfectly equipped self-government schools providing a wide educational offer, as well as a big support of the commune for pro-ecological projects, all of these are of the great significance for citizens.

With the purpose of creating the work resources for industry, the Technical College of Modern Technologies was founded. The school, which is one of the best in Poland, provides education for technicians specialized in mechatronics. The school strictly cooperates with the Łódź University of Technology. The teachers of vocational subjects are lecturers of the aforementioned university at the same time. They also cooperate with home and foreign companies in mechatronics branch.

Solpark Kleszczów leisure centre is a place where people can spend their spare time after work or school. Solpark Kleszczów offering swimming pools, SPA, rehabilitation zone, four-track bowling alley, professional gym, tennis courts, fully equipped conference rooms, a football pitch with an under-soil heating system and comfortable accommodation. We have also approximately 60 km of bike trails and a nature protected sanctuary.

We warmly invite you to Kleszczów where together with our investors assistance team we will present the attractiveness and value of our lands.



Commune of Kleszczów Development Foundation
3 Sportowa Str., 97-410 Kleszczów, Phone. + 48 44 731 31 33

Polish companies will invest more than 310 million PLN in the Katowice SEZ

Katowice Special Economic Zone closed the first half of this year with 20 new investments with a total value of 2.2 billion PLN and nearly 800 new jobs. What is important, is the greater interest of small and medium-sized companies and increasing investments of Polish companies that will carry out 70 percent of projects.

In 2018, Katowice Special Economic Zone attracted 51 projects with a total value of 2.5 billion PLN, including 11 investment projects worth more than 930 million PLN, based on the new regulations under the Polish Investment Zone.

– The year of 2018 was a record in our 20-year history, but the first months of 2019 have been equally successful. Already in the first half of the year we have 2.2 billion of direct investments, 790 new, high-paying, specialised jobs and the maintenance of the existing ones. – says Janusz Michalek, President of the Katowice Special Economic Zone.

In the first half of the year, metal industry (25%), automotive (20%) and machine industry (10%) companies dominated in the Katowice Special Economic Zone. Other industries, e.g. electric, electronic, IT, furniture and chemical are responsible for some percentage of investments.

– The Katowice Special Economic Zone is known for automotive industry. 90% of parts is produced in our Zone. We realize how important it is to diversify, which is why we are looking for new technologies. Recent investments of Korean companies such as Foosung and SK Innovation are associated with electromobility, but we have the machine industry. We are going below 60% of the automotive industry share. – says President of the Zone.

Korean company SK Innovation will invest more than 1 billion PLN in the construction of a production plant dealing with lithium-ion battery separators. This is the first investment of this company in Poland.

– Katowice Special Economic Zone is considered the best in Poland and in Europe. In its 22-year history, the Zone has created 22 thousand jobs, while a single job in the Zone creates a few jobs outside. 390 excellent companies have invested almost 35 billion PLN. – says Janusz Michalek.

According to the data of the Zone, Polish companies will invest a total of over 310 million PLN and implement 70% of the projects acquired through the Zone during the first half of 2019, 20% more than ever before. The number of investments carried out by small and medium-sized companies has increased, because they will implement 55% of the projects.

– Special Economic Zone is a chance to do business professionally and in a prestigious way. We see the stories of our clients, who started with the proverbial garage, and today are global players. – We see dynamic growth of small investors. Special Economic Zones have always been associated with large players, but now we see strong interest on the part of small companies. – says the President of the Zone.

The Katowice Special Economic Zone carries out various initiatives for small and medium-sized enterprises, such as the Booster SME project, which is a series of B2B meetings. The support for this segment of companies is one of the biggest challenges for our zone. One of the key areas is to provide investors with the availability of human resources. – added Michalek.

– We have the Silesian Industry 4.0 Centre of Competence, which help our enterprises in transformation to industry 4.0. We have the Polish-German Centre for Hybrid Lightweight Construction created together with the Silesian University. We create industry classes with our customers, e.g. Opel, dual studies. – lists Janusz Michalek. We are aware of how important is the market of qualified employees, which is why we are created a macrosystem for those entrepreneurs who have ideas and know what to do with them.

In early July, an agreement was signed for the establishment of the project “Silesian Professionals”, which is to support higher education in the region and increase the chances of young people on the labour market. According to the plan, the project will start in September and will last until the end of 2022.

– Our strategy for the coming years is to show young people that this is a good place to live and work. We are aware of the problems such as demography and the loss of residents, which is why we have our own original program Employee + Apartment +, dedicated to people with the Charter of Pole, who would like to come and live here. – says the President of the Zone.

The Zone along with investors will build company apartments, which will be made available to employees on preferential terms (rent subsidies). After 10-15 years, employees will have an opportunity to purchase the apartments. A training offer is also important.



INVESTMENT AREAS IN BYDGOSZCZ

Bydgoskie Wodociągi is the owner of land occupying nearly 91 hectares in Poland, the southeast part of Bydgoszcz, in the industrial district of Czersko Polskie. These non-built up areas are attractive in terms of location, technical infrastructure and access to important transport junctions. Another advantage of this land is connection to utilities, including water and sewage system, heat, power and telecommunications. In addition, access to the properties is offered by paved roads.

Investment areas are included in the local zoning plan according to which they can be used as land for production facilities, warehouses and storage areas. Services in the field of trade, catering, office and social functions related to the operation conducted are also admitted as accompanying services.

CZERSKO POLSKIE DISTRICT

Property of MWiK	Area [ha]
Lot No. 8/26, section 268	80,9422
Lot No. 4/5, section 267	8,9255
Lot No. 8/23, section 268	0,6918
Lot No. 8/22, section 268	0,4500
Total	91,0095



Contact our Department for Territorial and Legal Affairs by calling +48 52 58 60 941 or +48 661 406 755
or by e-mail: itp@mwik.bydgoszcz.pl to receive more information

A portrait of Jadwiga Emilewicz, Minister of Entrepreneurship and Technology, with her name and title in a dark blue box at the bottom right. The background is a blurred grey.

PIZ operation after less than a year

Investments are one of the cornerstones of our economic growth. In 2018, private and public expenditures increased by 8.7%. They contributed to the dynamically growing expenditures of the corporate sector and local governments. In addition, in terms of investment expenditures of companies, the last year was a record – they amounted to 212 billion PLN.

Neverbefore Polish companies have spent so much for this purpose. This positive trend strengthened in the first quarter of 2019, when we recorded a 12.6 percent investment growth. This is the highest quarterly increase in capital expenditures from 2015, and investment spending of medium and large enterprises grew by 21.7% per annum.

We also have good data on the first incomplete year of the Polish Investment Zone (PIZ), which replaced the earlier model of Special Economic Zones. Since the beginning of the PIZ, investments worth 13.6 billion PLN have been declared. Most often SMEs are the beneficiaries of new solutions. They represent 52% of companies benefiting from support. At the same time, 91% of them are Polish capital companies.

Importantly, small and medium-sized cities are also beneficiaries of the reforms. As shown in the report Grant Thornton, new rules for investment support drastically increase the investment attractiveness of counties with the highest unemployment and medium-sized cities that are losing their socio-economic functions. The new system of support for investments balances the chances of development of this group of cities, offering help which until now was only available in Special Economic Zones.

– The last year and the first quarter of this year are a period of marked acceleration in investments, including the dynamic growth of business spending for this purpose. We can also be optimistic when it comes to investment in the coming quarters. The basis for this is very good economic results in the second quarter of this year and the expected continued inflow of EU funds. An impetus for the growth of investment will be the fact that the utilization of capacity reached a historical high, meaning that further development requires investments. – says Minister Jadwiga Emilewicz.

– All these indications suggest an increase in investment in the whole economy in the coming quarters at a level close to 10% per annum. This, in turn, along with the stimulation of consumption, support of families and the elderly, can sustain higher rates of economic growth. I am also happy about the optimistic data on the functioning of the Polish Investment Zone. – emphasizes Emilewicz.

Tadeusz Kościński, until recently deputy head at MPiT, who piloted the work on the creation of the Polish Investment Zone, currently Deputy Minister of Finance: – Data on the first activities of the Polish Investment Zone are satisfactory. Not only we have opened the system for small and medium-sized enterprises, but also increased the participation of Polish capital. In addition, foreign investments are of high quality. Among the 10 biggest investors, according to the declared value of investments, in addition to foreign companies we have Polish enterprises such as Orlen or Impexmetal.

– Importantly, the number of re-investment projects is growing – from 75 in 2016 to 130 in 2018, and in the first six months of 2019 it already reached

60 projects. We also observe a clear increase of jobs created within Special Economic Zones and the Polish Investment Zone. At the end of 2018, entrepreneurs implementing their investments in this formula employed nearly 380 thousand people. The most dynamically developing in this respect were the Katowice Special Economic Zone and Wałbrzych Special Economic zone (approx. 4 thousand new jobs in each of them). Under the Polish Investment Zone, approx. 6000 new jobs have been declared (5 967). – adds Kościński.

THE FIRST EFFECTS OF THE POLISH INVESTMENT ZONE

Experience has shown that the system of support for investments based on the concept of Special Economic Zone not always used the available opportunities and possibilities to attract investments and generate new jobs, especially in less-developed areas, particularly the eastern Polish provinces.

The primary objective of the new approach is to encourage entrepreneurs to invest in the whole country. Therefore, Poland, under the Act of 10 May 2018 on supporting new investments, has become a single area of investments (Polish Investment Zone). From 5 September 2018, tax exemptions are available throughout the country. This means simpler and more accessible investments for SMEs, with flexible requirements tailored to the individual needs of investors.

The assessment of the Polish Investment Zone after one year of operation is positive. Since its beginning, investors have declared investments amounting to 13.6 billion PLN. However, after the first 6 months of this year, the declared value of investments amounts to nearly 7.8 billion PLN.

Importantly, in the structure of investments carried out in Poland and covered by the support of Special Economic Zones and the Polish Investment Zone we can see increased participation of domestic investors. While in the years 2016-2018, the average share of domestic investors in the aggregate declared value of investments amounted to 29%, in the first six months of 2019, under the new law, it increased to 37%.

Apart from Polish companies, companies from 21 other countries carried out investments under the Polish Investment Zone. Most of them represented the German (23 decisions), Swiss (6) and American (6) capital. Among the 10 biggest investors, in addition to foreign, there are leading Polish companies such as Orlen or Impexmetal.

Regardless of the Polish Investment Zone, our country offers favourable conditions for investments under the Program for support of investments of high importance for the Polish economy 2011-2023. As a result of this program, we have investments of such global companies as Toyota, Daimler, LG Chem, Lufthansa and Umicore. These are technologically advanced companies, which will translate into increased innovation and competitiveness of our economy.

The assessment of the
Polish Investment Zone
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Since its beginning,
investors have declared
investments amounting
to 13.6 billion PLN.

Small and medium-sized companies use investment incentives

Elimination of barriers that prohibited small and medium-sized enterprises from using tax exemption benefits is the biggest advantage of the Act on supporting new investments – says Przemysław Sztandera, President of the Pomeranian Special Economic Zone.



Przemysław Sztandera
President of the Pomeranian Special Economic Zone

Theregulation in force since September of the last year enabled SMEs to benefit from the support up until then available only for large foreign investors, creating an opportunity to develop regional economies for local governments. As pointed out by the president of the PSEZ, it also changed the role of special economic zone, forcing them to more actively seek new investors and cooperate more closely with local governments.

– The new Act on investment support has introduced many changes. First of all, it has expanded the area of operation of Special Economic Zones, making the whole Poland one big area of investments. This means that an investor can invest on any land, but of course there are some exclusions. It is no longer necessary to include this area into the Zone. Due to this fact, we grant decisions on support in a week or two, whereas in the previous legal regime granting a permit lasted several months. – says Przemysław Sztandera, President of the Pomeranian Special Economic Zone.

The Act on supporting new investments has changed the rules of operation of special economic zones. These included 14 separate administrative areas, which accounted for 0.8 percent of the country. The regulation has expanded the area in which it is possible to obtain investment incentives to the entire territory of Poland.

According to the Act, public aid for new investment projects (creation of a new production facility or reinvestment) is implemented, among others, in the form of exemption from CIT and PIT taxes for a period of 10 to 15 years. To receive assistance, it is necessary to meet the quantitative and qualitative criteria, depending on, among others, the size of the company and its industry, as well as the location and type of investment. The new rules entered into force fully in September last year, and their main aim is to stimulate private investments.

The President of the Pomeranian Special Economic Zone emphasizes that the law has opened the possibility of support for small and medium-sized enterprises, which were previously excluded due to long procedures, high capital threshold and territorial restrictions (to take advantage of the incentives, it was necessary to physically operate inside the Zone or incorporate an investment area into the Zone). In practice, this support has so far been available only to large foreign investors.

– The necessity of incorporation of investment areas into the Zone was the main barrier that inhibited the development of investments. The changes free more and more investment areas, making them more attractive. Municipalities has also become active when it comes to preparing parcels for potential investments. – says Przemysław Sztandera.

With the removal of territorial limitations, SMEs do not have to physically transfer their businesses to the zone and invest away from their area of operations. According to the President of the Pomeranian Special Economic Zone, the elimination of barriers, preventing small and medium-sized enterprises from using the benefits of tax exemptions, is the biggest advantage of the new law.



Let's meet in Stryków



**4 industrial parks
located in the commune**

**1000 ha for
investment lands**

**The central European
highways**

Stryków Municipality is located in the heart of Poland. On its territory, the intersection of two major highways in Poland is located: A1 (Gdańsk - Vienna) and A2 (Berlin - Moscow). The Central Europe motorway junction is a strategic asset of the Municipality which has contributed to the dynamic development of investment areas, while excellent transport connections provide quick access even from the remotest corners of the country. In addition, the railway line Łódź-Łowicz runs through the municipality together with a freight railway siding. The proximity of international airports in Łódź - 25 km and in Warsaw - 110 km encourages for investments.

In view of the dynamic development, Stryków Municipality zoning plan has allocated over 1000 ha for investment areas, most of which have access to water, sewage, electricity and gas networks. Excellent logistic location means that the municipality has attracted national and global leaders from: Switzerland, Great Britain, Germany, Finland, Netherlands, USA or France.

Four industrial parks operate in the municipality: Segro Logistics Park Stryków, Panattoni Park Stryków, Diamond Business Park Stryków, Prologis Park Stryków and Łódź Special Economic Zone. In the industrial parks located in Stryków, companies from the logistics, automotive, parcel, construction, pharmaceutical, food, innovative technology industries operate.

An investor who decides to locate the business in Stryków can be sure to find professional service and climate favourable for development. Adoption of the spatial development plan, the creation of an investor service point and professional promotional activities in the country and abroad have contributed to building a positive image of the municipality among investors.

In Stryków Municipality, fans of active leisure will also find a wide range of outdoor sporting events with nationwide coverage. In September, we encourage you to participate in Triathlon Stryków, known among the lovers of active leisure in Poland, during which participants compete on two distances: 1/4 IM and 1/8 IM. Fans of extreme motor sports can come to the only motocross track in the province, in which every year the Polish Motocross Championship round is held and twice a year a Round of Łódź District Championship in Cross Country. Another tourist attraction of Stryków Municipality is the only one rally track in Łódzkie Province, where lovers of adrenaline can test their skills. Horse lovers can take advantage of equestrian centres and explore the municipality travelling through the Łódź Horse Trail. Furthermore, multifunctional sports fields, sports and leisure centre on Strykowski Reservoir with modern playgrounds, skatepark, water equipment, pedestrian and bicycle path and fitness devices, as well as great location in the Łódź Hills Landscape Park encourage for active leisure.

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The strongest first half of the year in the history of the warehouse market in poland

Almost 1.1 million sq m of modern warehouse and industrial space was delivered in the first half of 2019 in Poland, which is the highest volume of new supply recorded ever during the first six months of a year, says real estate advisory firm Savills.

According to “Market in Minutes - Warehouse market in Poland” research analysis published by Savills, thanks to the record high new supply in the first half of the year, total stock of modern warehouse and industrial space in Poland raised to 16.8 million sq m. We witnessed also some reshuffling among the largest markets. Warsaw maintains its leading position (4.1 million sq m), while Central Poland (2.73 million sq m) overtook

Upper Silesia (2.66 million sq m) due to 246,500 sq m delivered to the market in that region in H1. Over 2.2 million sq m of warehouse and industrial space remains under construction across Poland, with Panattoni BTS Amazon Gliwice as the biggest project (210,000 sq m).

– In the first half of the year the largest level of new supply was observed in Central Poland, what made this region the second most important logistic market in the country, just behind Warsaw (zone I and II). What’s more, in the capital city of Poland as well as in Wrocław we noticed very strong demand. City logistics is still one of the key trends. At the end of June 2019 there was ca. 52,100 sq m of space under construction located in such schemes and the demand for urban logistics warehouses remains high at ca. 31,000 sq m of net take-up in H1 2019. – says Kamil Szymański, Head of Industrial Agency, Savills.

As stated by Savills, gross demand in H1 2019 amounted to 1.8 million sq m, down by 16% y-o-y. The largest volume of take-up was noted in Warsaw (almost 580,000 sq m), nearly 50% more than a year before. Key lease agreements (ca. 60,000 sq m each) signed in H1 include: Jysk (Logistic City Piotrków Trybunalski), Pantos Logistics (Panattoni Park Wrocław XI) and PepsiCo (P3 Mszczonów).

Poland’s vacancy rate noticed minor decrease (0.4 pp compared to the first quarter) and at the end of June 2019 remained low at 5.1%. The highest rate was observed in Upper Silesia (7.6%) and Poznań (7.5%). Headline rents were stable: EUR 2.7–4.2/sq m/month for big-box warehouses and stood at EUR 5.35/sq m/month for SBUs in Warsaw.

– The warehouse market kept the momentum. Following the record-breaking level of new supply in H1, the whole year may end with the highest volume of new warehouse and industrial space delivered to the market at ca. 2.5 million sq m. – concludes Kamil Szymański, Savills.



Kamil Szymański
Head of Industrial Agency, Savills



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AND STORAGE HALL
IN MIELEC**

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AND STORAGE HALL
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Drozsze grunty, to droższe mieszkania zarówno dla dewelopera, jak i kupującego



Robert Korczyński
członek zarządu Emmerson Evaluation

Rosnące ceny gruntów pod zabudowę mieszkaniową wielorodzinną to jeden z głównych czynników napędzających wzrost cen mieszkań w Polsce. W 2018 r. w najatrakcyjniejszych dzielnicach Warszawy i Wrocławia, podrożały one nawet o 20% w skali roku. Przy rosnących jednocześnie kosztach budowy, deweloperom coraz trudniej osiągnąć opłacalną marżę na inwestycjach. To realny problem, w ubiegłym roku z tego powodu część transakcji gruntami nie zostało sfinalizowanych.

W raporcie dotyczącym gruntów inwestycyjnych przeznaczonych pod zabudowę mieszkaniową wielorodzinną Emmerson Evaluation przeanalizował rynki największych polskich miast z najbardziej rozwiniętymi rynkami deweloperskimi. W opracowaniu przyjęto faktyczne ceny sprzedaży gruntów dla transakcji dokonanych w 2018 roku, zebranych w autorskiej bazie Evaluer i przedstawiono je w przeliczeniu na cenę 1 mkw. powierzchni użytkowej mieszkalnej (PUM). To wskaźnik, który odnosi się do potencjalnej zabudowy możliwej do zrealizowania na danym gruncie. Analiza wykazała, że w większości ujętych w raporcie miast ceny gruntów wzrosły.

Największe podwyżki Emmerson Evaluation odnotował na rynku warszawskim i wrocławskim. Najbardziej stabilne ceny utrzymał Kraków i Szczecin. Najdrożej grunty sprzedawały się w Warszawie, Krakowie i Trójmieście. Według raportu średnie ceny 1 mkw. PUM w tych miastach w 2018 r. wynosiły odpowiednio 2100 zł, 1650 zł i 1500 zł. Z analizowanych w raporcie rynków najniższą cenę za grunt inwestycyjny należało zapłacić w Łodzi, gdzie średnio kształtowała się ona na poziomie 650 zł/mkw. PUM. Najmniejszą ofertą gruntów dostępnych

na sprzedaż charakteryzował się Kraków i Sopot. Natomiast największą dostępność gruntów inwestycyjnych można było zaobserwować w Szczecinie i Łodzi.

MIMO PRZESKÓD DEWELOPERZY BUDUJĄ

Wysokie wyniki sprzedaży mieszkań skłaniały i nadal zachęcają deweloperów do realizacji nowych inwestycji i tym samym do zakupu nowych terenów na ten cel. Nie wszystkie ich plany i projekty dochodzą jednak do skutku. Dynamika wzrostu kosztów budowy spowodowała, że wiele transakcji gruntami w 2018 roku nie zostało sfinalizowanych. Przy ich wysokich cenach oraz rosnących kosztach budowy deweloperzy muszą też podnosić ceny mieszkań, aby realizować marżę na zadowalającym poziomie.

— W najlepszej sytuacji są inwestorzy, którzy posiadają duże banki ziemi. Mniejsi deweloperzy kupując obecnie grunt są skazani na duże ryzyko nieosiągnięcia zakładanej rentowności inwestycji. — zauważa Robert Korczyński, członek zarządu Emmerson Evaluation.



Na skutek braku możliwości zakupu atrakcyjnych gruntów inwestycyjnych w zadowalających cenach, deweloperzy coraz śміielej inwestują w grunty poindustrialne, wymagające np. remediacji, czy w nieruchomości zabudowane obiektami objętymi ochroną konserwatorską czy nawet w nieruchomości z problemami prawnymi, wskazują eksperci Emmerson Evaluation. Tego typu grunty, z uwagi na ryzyko inwestycyjne, miały niskie ceny. Jednak obecnie także one drożeją.

Według danych zebranych w raporcie „Grunty pod zabudowę mieszkaniową wielorodzinną”, średni udział ceny gruntu w wartości całkowitej inwestycji w miastach takich jak Warszawa, Trójmiasto, Kraków nieznacznie przekracza poziom 20%, natomiast w najdroższych lokalizacjach może osiągnąć nawet 37%. We Wrocławiu czy Poznaniu udział ceny gruntu w wartości całkowitej inwestycji wynosił średnio 16%. Najniższy poziom analitycy firmy odnotowali w Łodzi i Szczecinie - średnio 13% i 14%.

GRUNTY POZOSTANĄ W CENIE

Emmerson Evaluation prognozuje, że do końca 2020 roku ceny gruntów pod zabudowę mieszkaniową wielorodzinną będą jeszcze rosły, jednak ich tempo będzie znacznie niższe niż dotychczas. Kluczowa dla cen gruntów będzie sytuacja na rynku budowlanym oraz skłonność do akceptacji podwyżek cen mieszkań ze strony kupujących, wskazują analitycy firmy.

— Spodziewamy się również, że na rynku coraz częściej będą pojawiać się transakcje gruntami, na których deweloperzy będą realizować inwestycje typu „brown-field”. Wśród mniejszych deweloperów spodziewamy się natomiast większego niż dotychczas zainteresowania terenami położonymi w sąsiedztwie dużych miast. To z kolei spowoduje wzrost cen na tych obszarach. Najwięksi gracze pozostaną zainteresowani dużymi terenami inwestycyjnymi, gdzie może powstać nawet kilkadziesiąt mieszkań. Z uwagi na skalę inwestycji daje im to możliwość uzyskania zysku na wysokim poziomie. — podsumowuje Robert Korczyński z Emmerson Evaluation.

W KSSE polskie firmy zainwestują ponad 310 mln zł

Katowicka Specjalna Strefa Ekonomiczna zamknęła pierwsze półrocze tego roku 20 nowymi inwestycjami o łącznej wartości 2,2 mld zł i blisko 800 nowymi miejscami pracy. To, co istotne, to większe zainteresowanie małych i średnich firm oraz wzrost inwestycji polskich przedsiębiorstw, które zrealizują 70 proc. projektów.

W 2018 roku KSSE pozyskała łącznie 51 projektów o wartości 2,5 mld zł, w tym 11 projektów inwestycyjnych na kwotę ponad 930 mln zł w oparciu o nowe przepisy w ramach Polskiej Strefy Inwestycji.

– Rok 2018 był rekordowy w naszej dwudziestokilkuletniej historii, ale pierwsze miesiące 2019 roku są równie udane. Już za pierwsze półrocze mamy ponad 2,2 mld inwestycji bezpośrednich, 790 nowych, wysoko płatnych, specjalistycznych miejsc pracy i utrzymanie już istniejących. – mówi Janusz Michałek, prezes Katowickiej Specjalnej Strefy Ekonomicznej.

W pierwszym półroczu w KSSE dominowały firmy z branży metalowej (25 proc.), motoryzacyjnej (20 proc.) i maszynowej (10 proc.). Pozostałe branże, m.in. elektryczna, elektroniczna, IT, meblarska czy chemiczna odpowiadają za kilka procent inwestycji.

– KSSE jest znana z branży automotive. 90 proc. części na świecie jest produkowane właśnie u nas. Zdajemy sobie sprawę z tego, jak bardzo ważna jest dywersyfikacja, dlatego poszukujemy nowoczesnych technologii. Ostatnie inwestycje koreańskich firm, jak Foosung czy SK Innovation, to elektromobilność, ale mamy przemysł maszynowy. Schodzimy już poniżej 60 proc. udziału branży automotive – zaznacza prezes KSSE.

Koreańska firma SK Innovation zainwestuje ponad 1 mld zł w budowę zakładu produkcji separatorów baterii litowo-jonowych. To pierwsza inwestycja tego przedsiębiorstwa w Europie.

– Katowicka Specjalna Strefa Ekonomiczna jest uznawana za najlepszą strefę, nie tylko w Polsce, lecz także w Europie. W swojej 22-letniej historii stworzyła 80 tys. miejsc pracy, a jedno miejsce pracy w strefie tworzy nawet kilka miejsc pracy poza nią. 390 bardzo dobrych firm zainwestowało już prawie 35 mld zł – wymienia dr Janusz Michałek.

Z danych KSSE wynika, że polskie firmy zainwestują łącznie ponad 310 mln zł i zrealizują 70 proc. projektów pozyskanych przez strefę w ciągu I półrocza 2019 roku, o 30 proc. więcej niż dotychczas. Wzrosła też liczba inwestycji realizowanych przez najmniejsze i średnie firmy, które przeprowadzą 55 proc. projektów.

– Specjalna strefa ekonomiczna to szansa na zrobienie biznesu profesjonalnie, prestiżowo. Obserwujemy historie naszych klientów, którzy zaczęli z przysłowiowego garażu, a dzisiaj są globalnymi graczami. – wskazuje prezes KSSE. – Mamy dynamiczny wzrost małych inwestorów. Specjalne strefy ekonomiczne kojarzyły się zawsze z dużymi i oni wciąż są, ale teraz mocno zauważamy zainteresowanie małego biznesu.

Katowicka strefa realizuje różne inicjatywy dla małych i średnich przedsiębiorstw, to m.in. projekt Booster MŚP, czyli cykl spotkań B2B. To właśnie wsparcie dla tego segmentu firm jest jednym z większych wyzwań dla KSSE. Jednym z kluczowych obszarów, w które angażuje się strefa, jest zapewnienie inwestorom dostępności kadr.

– Mamy Śląskie Centrum Kompetencji Przemysłu 4.0, które pomoże naszym przedsiębiorcom w tej transformacji ze zwykłego przemysłu do 4.0. Mamy utworzone wspólnie z Politechniką Śląską Polsko-Niemieckie Centrum Hybrydowych Konstrukcji Lekkich. Tworzymy klasy branżowe z naszymi klientami, np. z Oplem, studia dualne. – wymienia dr Janusz Michałek. – Zdajemy sobie sprawę z tego, jak ważny jest dzisiaj rynek pracownika, wykwalifikowanego pracownika, i dlatego stwarzamy taki makrosystem dla tych przedsiębiorców, którzy mają pomysły i nie wiedzą, co zrobić.

Na początku lipca została podpisana umowa dotycząca uruchomienia projektu „Śląskie. Zawodowcy”, który ma wspierać szkolnictwo wyższe w regionie i zwiększać szanse młodzieży na rynku pracy. Zgodnie z planem ruszy od września br. i potrwa do końca 2022 roku.

– Nasza strategia na najbliższe lata jest taka, żeby młodym ludziom pokazać, że to jest dobre miejsce do mieszkania i pracowania. Zdajemy sobie sprawę z problemu Śląska, jakim jest demografia i ubytek mieszkańców, dlatego też mamy swój własny autorski program Pracownik + Mieszkanie+, dedykowany ludziom z Kartą Polaka, którzy chcieliby tu przyjechać i zamieszkać. – mówi prezes KSSE.

Strefa razem z inwestorami będzie budować mieszkania zakładowe, które będą udostępnione pracownikom na preferencyjnych warunkach najmu (dopłaty mieszkaniowe). Po 10–15 latach pracy będą oni mieli możliwość zakupu tych lokali na własność. Istotna jest również oferta szkoleniowa dla zainteresowanych osób.



**CHCESZ DOTRZEĆ
DO POTENCJALNYCH
INWESTORÓW?**

**CHCESZ DECYDOWAĆ
O WYSOKOŚCI BUDŻETU
REKLAMOWEGO?**

**CHCESZ ABY REKLAMA
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**GOOGLE ADS TO NARZĘDZIE DO ZADAŃ SPECJALNYCH,
W KTÓRYM ŚWIETNIE SIĘ PORUSZAMY.**

**MARKETING TERENÓW INWESTYCYJNYCH
I NIERUCHOMOŚCI KOMERCYJNYCH**

Najlepsza pierwsza połowa roku w historii rynku magazynowego w Polsce

W pierwszej połowie roku w Polsce przybyło blisko 1,1 mln m kw. nowej powierzchni magazynowo-przemysłowej, co było najwyższym wynikiem odnotowanym w ciągu pierwszych sześciu miesięcy w historii tego sektora rynku nieruchomości, podała firma doradcza Savills.

Jak wynika z raportu „Market in Minutes - Rynek magazynowy w Polsce” opracowanym przez Savills, dzięki rekordowej nowej podaży odnotowanej w pierwszych sześciu miesiącach roku, na koniec czerwca Polska dysponowała 16,8 mln m kw. nowoczesnej powierzchni magazynowo-przemysłowej. Doszło również do przetasowania wśród regionów dysponujących największymi zasobami. Pozycję lidera utrzymała Warszawa (4,1 mln m kw.), ale na drugie miejsce wskoczyła Polska Centralna (2,73 mln m kw.), która wyprzedziła Górny Śląsk (2,66 mln m kw.), dzięki 246 500 m kw. oddanym do użytku w tym regionie w pierwszej połowie roku. Na koniec czerwca w budowie pozostawało 2,2 mln

m kw. nowej powierzchni, z czego 210 000 m kw. przypada na obiekt dla firmy Amazon budowany w Gliwicach przez Panattoni Europe.

– W pierwszej połowie 2019 roku Polska Centralna odnotowała znaczący wzrost podaży, co przysparza jej statusu drugiego najważniejszego regionu logistycznego w Polsce, po rynku Warszawy i okolic. W stolicy oraz we Wrocławiu zaobserwowaliśmy z kolei bardzo wysoki popyt. Silnym trendem pozostaje logistyka miejska. W ciągu pierwszych sześciu miesięcy roku wynajęto 31 000 m kw. w tego typu obiektach, a na koniec czerwca w budowie pozostawało ponad 52 000 m kw. nowej powierzchni dedykowanej logistyce miejskiej. – mówi Kamil Szymański, dyrektor działu powierzchni magazynowych i przemysłowych w Savills.

Zgodnie z danymi Savills w ciągu pierwszych sześciu miesięcy 2019 roku w Polsce wynajęto 1,8 mln m kw., co oznacza spadek rok do roku o 16%. Ogromny, blisko 50% wzrost popytu w stosunku do analogicznego okresu w 2018 r. odnotowano w Warszawie, gdzie w pierwszej połowie 2019 r. wynajęto najwięcej powierzchni (blisko 580 000 m kw.). W tym czasie największe umowy najmu w Polsce podpisały firmy Jysk (Logistic City Piotrków Trybunalski), Pantos Logistics (Panattoni Park Wrocław XI) i PepsiCo (P3 Mszczonów), z których każda opiewała na ok. 60 000 m kw.

Stopa pustostanów odnotowała lekki spadek w stosunku do pierwszego kwartału (0,4 pkt. proc.) i na koniec czerwca 2019 r. utrzymała niski poziom 5,1%. O wolną powierzchnię magazynowo-przemysłową najłatwiej na Górnym Śląsku (7,6%) oraz w Poznaniu (7,5%). Czynsze bazowe utrzymują się na poziomie od 2,7 euro do 4,2 euro za m kw. na miesiąc w przypadku wielkopowierzchniowych obiektów, sięgając 5,35 euro za m kw. na miesiąc w mniejszych modułach zlokalizowanych na terenie Warszawy.

– Rynek magazynowy w Polsce utrzymuje dynamiczne tempo wzrostu. W ślad za rekordową nową podażą w pierwszych sześciu miesiącach, cały 2019 rok ma szansę zamknąć się najwyższym wynikiem w historii, wzbogacając nasz rynek o 2,5 miliona m kw. nowej powierzchni magazynowo-przemysłowej. – podsumowuje Kamil Szymański z Savills.



Kamil Szymański
Head of Industrial Agency, Savills

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