

Investment Areas in Poland

Munich, October 2013



Presentations of investment grounds



INVESTMENT AREA IN GRUDZIADZ

POMERANIAN SPECIAL ECONOMIC ZONE

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Investment Areas in Poland

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Poland is the best for investing in the region

Poland is the best for investing in the region

Dear Readers, with great pleasure, for the second time, we present you the catalogue "Investment Areas in Poland", prepared especially for the International Trade Fair for Property and Investment 2013 in Munich. In the catalogue, we present you the investment potential of Poland, emphasizing in particular the advantage, which are well-prepared investment sites. At the same time we want to show the range of investment opportunities offered by Poland, to begin with the special economic zones, through diverse possibilities offered by different regions, and finishing with the positive reception of Poland on international business arena. Poland is considered as one of the business leaders in Central and Eastern Europe, however, its advantages are outstanding not only in the region but also in the entire European Union.



Marta Sniegocka
editor in Chief - terenyinwestycyjne.info

Last months were very successful for the investors acting in Poland. The Government decided to extend the time of operating of special economic zones to 2026. At the same time it was decided to adopt favourable solutions about granting assistance to projects that are important to the economy. And the Labour Code has been enriched through a convenient solution for employers, allowing them to manage the work time of the employees more flexibly.

Why Poland?

Poland with the surface covering 312 679 km² takes the 9th place in Europe in terms of size, and is one of the biggest countries of Central and Eastern Europe region. This size allows the investors to be flexible when choosing the best locations for their future businesses. Additional advantage of the country is its strategic location which allows Poland to be a link between Western and Eastern Europe.

In Poland, there are attractive areas for industrial, logistics and production investments, situated near junctions and floodway systems and with easy access to necessary raw materials. At the same time Poland is distinguished by a rapidly growing market office properties with the centre in Warsaw and strong regional markets, such as

Kraków, Wrocław, Poznań, and Tri-City. This and access to skilled and educated staff allows to develop BPO and ITO investments.

A multitude of universities and science and technology parks as well as research centres provides also facilities for investments for which high technology and specialised know-how are required. Also, the best in the region conditions for supporting R & D investments enable rapid development of research facilities.

More and more land thoroughly prepared for investment arose through the efforts of central and local government, and the support of EU funds in recent years. Millions have been used to provide water supply, sewage, electricity and telecommunication networks. In the years of 2014 – 2020, Polish local authorities plan to continue intensive preparation of land for investment. They will also focus on creating R&D supporting the development of clusters, incubators and science and technology parks.

Poland really stand out for investment attractiveness

Poland managed to avoid recession during the crisis and user this tumultuous time to strengthen its position in the region and the world. When writing about the investment attractiveness, hackneyed slogans or catchy phrases are used. However, Poland does not need embellishments, as it can show hard evidence that state directly: Poland stands out in the region.

Investment possibilities in Poland were appreciated by the investors from Germany. Polish-German Chamber of Industry and Commerce (AHK) conducted once again a survey among investors with foreign capital operating in Central and Eastern Europe. Investors pointed to Poland as the most attractive country in the region for placing investments. Thanks to this, the first time in seven years, Poland was considered more attractive country than the Czech Republic. The largest percentage of investors (94 %) would decide to invest once again exactly in Poland. German investors appreciated in Poland in particular the availability of skilled labour, as well as the productivity and motivation of Polish workers. Investors value the stability of the Polish political scene, and some of the best opportunities for the development of R & D in the region.

This opinion is shared by the investors from all over the world. In the study "Investment attractiveness of Europe" conducted by the world consulting company Ernst&Young Poland was recognised as the most attrac-

tive location for new investment projects in Central and Eastern Europe by the majority of investors (37%). Once again, Poland defeated the Czech Republic, which took second place, taking 15 % of voices. Investors are not empty talking. Poland dominates in Europe in terms of the number of new investment projects and employees. Poland took the 1st place in the region and the 7th in Europe with 148 new projects. It is worth mentioning that Poland took the 3rd position in Europe in terms of the new created workplaces (13 111).

A year ago, in the 10th edition of the Investment Attractiveness of Europe, investors stated, that over the next three years Poland will be the second most attractive destination for FDI in Europe. We have been overtaken only by Germany. Now, the number of new projects and people working thanks to FDI confirm last year's declarations of investors - says Jacek Kędzior, Managing Partner of Tax Advisory Team of Ernst & Young.

Also in the report developed by UNCTAD (United Nations Conference on Trade and Development), Poland stand out, taking 2nd place in the European Union in terms of number of brownfield projects. Their value is estimated at \$ 11.5 billion.

Research conducted by global organizations clearly demonstrate that it is time for Poland. The country stands out not only in the immediate vicinity of the neighbours from Central and Eastern Europe, but more and more effectively competes for of investors with the countries of Western Europe.



The operation of the SEZ has been prolonged.

In Poland, the SEZ-s have existed since 1994. Initially, they were supposed to exist for 20 years, but in 2008 the term has been extended to 2020. It turned out that this type of aid, allowing the exemption from CIT income tax and giving access to well-prepared investment sites is so popular among investors that the Ministry of Economy insisted on another extension.

That was the decision the investors were anxiously waiting for. Discussions between the Ministry of Finance and the Ministry of Economy about the extension of the operational time of Special Economic Zones have lasted for over a year. Finally, the ministry reached a consensus and the government decided that the Special Economic Zones will run at least until 2026. At least, because more and more voices can be heard that the benefits generated by SEZ-s both for Poland and for investors, predispose them for an indefinite period of operation.

Along with the extension of the operational period of the SEZ-s the decision about enlargement of existing zones. In the beginning, SEZ of Mielec and SEZ of Stupsk have increased their investment areas, however, the remaining 12 zones are waiting for the next enlargements. It gives the investors the possibility of free choosing the SEZ area.

Polish Government provides facilitations for investors.

This year, the positive solutions for investors making use of government's grants have been introduced. In August, the Cabinet adopted a resolution amending the

"Program to support investments of high importance for the Polish economy for 2011-2020".

The change is aimed to increase the investment attractiveness of Poland and give the chance to benefit from this kind of help to more Polish and foreign entrepreneurs. The most significant change proposed in the "Programme" is to reduce parameters of granting support to important projects from 1 billion zł of eligible costs and 500 workplaces to 750 million zł and 200 workplaces. The amount of 500 million zł while creating 500 workplaces will also be allowed.

Another attractive option, especially for regions of Eastern Poland is the possibility of granting support to the productive investments in counties with an unemployment rate below 75% of country's average. In such places, the investments that guarantee 500 new workplaces at the inputs of 500 million zł and 200 workplaces at 750 millions zł could arise.

Support for projects far exceeding the minimum values specified in the "Program" has also been increased by 4 percent. Help will be granted to the projects of minimal eligible costs of 750 millions zł and 200 new workplaces or 500 millions zł and 500 workplaces. The grants cannot be combined with other regional aid from the state budget, programs that are co-financed from EU funds and tax exemptions in SEZ-s.

The R&D minimal investment costs, in turn, will fall from 3 million zł to 1,5 million zł. Also R&D projects under the eligible investment costs of at least 10 million zł and creating at least 35 jobs for people with higher education will be supported. The entrepreneur may receive subsi-

dies for factory R & D activities, such as laboratory equipment and purchase of equipment for testing.

The "Program" also implies 20 percent bonus for creation of new jobs and support for investments in Poland bigger by 5 percent.

Changes in the support program of major investment projects are not the only changes in the law. The investors complained that inflexible labour law makes it difficult to settle up with staff, particularly in relation to the periodic changes in economic conditions. Extending the settlement period from 4 to 12 months will allow entrepreneurs to adapt the need for work according to current necessities. Some branches are characterised by high seasonality. Introduced changes will allow avoiding the need to pay overtime at times of increased demand.

Thousands of investors cannot be wrong. When deciding to invest in Poland, companies get access to the vibrant internal market, well-prepared investment sites, ever-expanding road and rail infrastructure and friendly investment atmosphere. Poland is tempting companies with Special Economic Zones, numerous science and technology parks and impressive office, warehouse and manufacturing base. Polish local authorities are characterized by a favourable approach to investors and are keen to work on new projects, while providing assistance to companies already operating.

We encourage you to look at the offer presented in the "Investment Areas in Poland" catalogue.

Poland is simply worth investing.



THE LARGEST MOTORWAY JUNCTION IN POLAND - GLIWICE

Land for office and retail space dominate in first half of 2013's transactions

Colliers International has summarized land market in Poland in the first half of 2013. "Investors are willingly buying land for office and retail space – these transactions accounted for 65% of all transactions in H1 2013. For residential and industrial land, investors dedicated 30% and 5% of their funds respectively." – says Emil Domeracki, Senior Associate at Land Department of Colliers International "In the first half of 2013, we witnessed a stabilization of land prices as well as stable business sentiments." – adds Domeracki



Emil Domeracki - Colliers International Poland

GENERAL OVERVIEW

- In the first half of 2013, we witnessed a stabilisation of land prices as well as stable business sentiments.
- Supply remained relatively high in the first six months of 2013. Areas that are well prepared for the investment process in terms of technical, legal and planning conditions are priced relatively higher. Another factor boosting their values is a favourable location.
- Investors are willingly buying land for office and retail space – these transactions accounted for 65% of all transactions in H1 2013. For residential and industrial land, investors dedicated 30% and 5%

of their funds respectively. Approximately 80-85% of office and residential land transactions were in Warsaw.

- Despite the progressive stabilisation in the land market in H1 2013, some negative trends have also been observed. The two main trends were: sales of land by a handful of developers in financial difficulty, and a reduction in land portfolios by banks, which are trying to encourage their customers' selling activity.

TRENDS

- In terms of retail investment sites, plots located in major cities are enjoying increasing popularity. At the

TRENDS H2	2013	OFFICE
SUPPLY		➡
DEMAND		↗
PRICES		➡

Source: Colliers International

TRENDS H2	2013	RETAIL
SUPPLY		➡
DEMAND		↗
PRICES		➡

Source: Colliers International

TRENDS H2	2013	RESIDENTIAL
SUPPLY		⬆
DEMAND		↗
PRICES		➡

Source: Colliers International

same time, smaller urban areas with more than 30,000 inhabitants remain attractive for investors, building, for example, small retail parks.

- Another recent trend is the increasing popularity of conditional agreements, which enable investors to discount money in time, though no longer than 18-24 months.
- Developers cannot afford to "freeze" their funds; therefore, they prefer to buy land where construction can start immediately. Currently, the majority of investments are planned for the short-term, which means that they will be started and completed in a 5-year period. In the event of impediments regarding the land that can be removed relatively quickly, a conditioned preliminary sales agreement is concluded. The transaction is completed after solving the problems.
- Despite considerable supply, the demand for land is not being met completely. This is mainly caused by a lack of land that meet developers' requirements. An unfavourable location or the legal situation of a plot preventing investors from effectively developing it are the main reasons why some sites are not subject to sale.

GDANSK SCIENCE AND TECHNOLOGY PARK



SELECTED TRANSACTIONS H1 2013

INVESTOR	LOCATION	SIZE (ha)	PRICE (PLN mln)
Confidential	Warsaw	2.2	25
Confidential	Warsaw	1.9	21

Source: Colliers International

PRICES FOR THE OFFICE DEVELOPMENT SITES (EUR /m² of GLA)

CITY/REGION	MIN	MAX	AVERAGE
Warsaw : City Centre	400	800	600
Kraków	150	400	275
Łódź	150	320	235
Poznań	140	280	210
Upper Silesia	75	160	117.5
TriCity	100	300	200
Wrocław	120	350	235

Source: Colliers International

PRICES FOR THE RESIDENTIAL DEVELOPMENT SITES (EUR /m² of PUM)

CITY/REGION	MIN	MAX	AVERAGE
Warsaw: City Centre	300	900	600
Warsaw: Uptown	140	380	260
Kraków	120	300	210
Łódź	70	180	125
Poznań	80	280	180
Upper Silesia	60	200	130
TriCity	100	300	200
Wrocław	130	300	215

Source: Colliers International

- Investors are looking for markets where price, leasing conditions and demand for properties are guaranteeing the fastest return on equity.

PRICES AND TRANSACTIONS

- Since the beginning of 2013, the value of transactions in the land market for office, retail, residential and industrial developments (including takeovers of entities that own such land) has reached approximately PLN 300 m,

representing 20% of total transaction volume from 2012, which amounted to PLN 1.5 bn.

- Statistically, the price of land needed to build 1 m² of residential usable space in H1 2013 was lower than in the previous year, for example by 7% in Katowice and by 3% in the centre of Warsaw.
- The biggest decline in the price of land for office space was observed in Katowice (12%) and TriCity (8%), while the smallest was in Warsaw, where the price of 1 m² of office development site fell by 2-3% and stayed at a level similar to residential development sites.
- Land prices for retail development have stabilised and it seems that they will remain unchanged in the forthcoming months for both traditional shopping centres and retail parks.

PROGNOSIS

- Increased activity in the land market is expected in 2013. The transaction volume is likely to be higher than in the previous year, which is being confirmed by contracts and conditional agreements signed so far.
- The two last quarters of 2013 will be characterised by high dynamics in the land market for office and retail developments, while investors will be less active in the market for the land intended for residential developments. The most popular cities will be Warsaw, Wrocław and Kraków, followed by Gdańsk and Poznań.
- It can be expected that the main markets for residential development sites will be Warsaw and Wrocław. In the case of other regional markets such as TriCity, Poznań, Kraków and Szczecin, any prospective transactions will be carried out by local developers.
- Consultations held by Colliers International with developers and investment funds on both current and planned transactions allow us to estimate that there is a possibility of exceeding the transaction value from the previous year in 2013. It is worth pointing out that the majority of transactions will be completed in the Warsaw market.

"Consultations held by Colliers International with developers and investment funds on both current and planned transactions allow us to estimate that there is a possibility of exceeding the transaction value from the previous year in 2013. It is worth pointing out that the majority of transactions will be completed in the Warsaw market."

– summarizes Emil Domeracki from Colliers International

Śląskie Voivodeship



The data in Figures

The total area	12 333 km ²
The total population	4 638 462
The population density	376 people/km ²
The main city	Katowice
The largest city in the region	<ul style="list-style-type: none">• Częstochowa• Sosnowiec• Gliwice• Zabrze• Bytom

Special Economic Zones

Industrial Parks and Technology	<ul style="list-style-type: none">• Bielski Technology Park of Aviation-innovation, cooperation and development• Bytom Industrial Park• Częstochowa Industrial Park• Upper Silesian Industrial Park• Jaworzno Industrial-Technology Park• Industrial Park "Cross Point" in Żory• Stara Huta Industrial Park• Euro Center Science and Technology Park• Euro Center Industrial Park• Ziemia Pszczyńska Industrial Park• Technopark Science-Technology Park in Gliwice• Ruda Śląska Business Incubator• Rybnik Technology Incubator• Industrial and Technological Park - EkoPark – in Piekary Śląskie• Sosnowiec Science and Technology Park• Synergy Park Business and Industrial Park• SEGRO Industrial Park Tychy• Silesian Industrial Park• Żory Industrial Park
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Investor Assistance Centre	Investor Service Centre ul. Ligonia 46, 40-037 Katowice www.invest.slaskie.pl
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The Office of the Marshal	ul. Ligonia 46, 40-037 Katowice www.slaskie.pl
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Voivodeship Office	ul. Jagiellońska 25, 40-032 Katowice www.katowice.uw.gov.pl
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International Airport	Katowice-Pyrzowice
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Presentation of the Region

Śląskie voivodeship is situated in the south of Poland and borders Slovakia and the Czech Republic. It is Poland's most industrialised region and one of the most industrialised in Europe. Until recently it was associated only with heavy industry. Although that sector continues to dominate (60 mines and 18 iron and steel works), it is now also known for its motor industry which is developing apace. Next to Mazowieckie and Wielkopolskie voivodeships, Silesia ranks among the country's most attractive regions in terms of investments as well as lowest investment risks. Despite its industrial character, agricultural areas account for more than one-half of its area, and some 40% of its people live in rural areas.

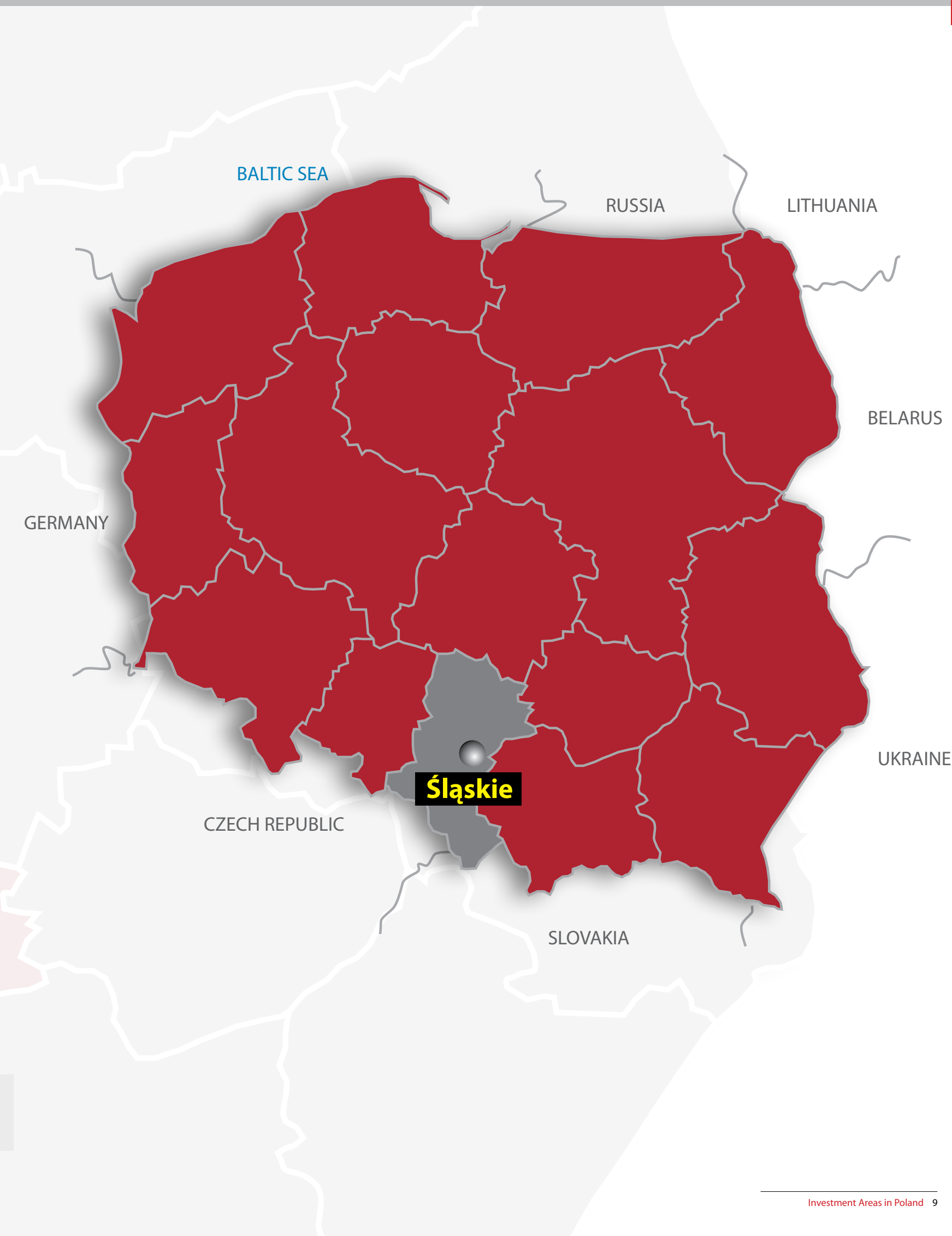
Advantages of the voivodeship

- the most industrialized and urbanized region of Poland,
- enormous potential and absorptive market - almost 5 million consumers
- availability of investment offer: industry, services, development and modernization of infrastructure, tourism, agriculture,
- second region in Poland in terms of the number of big investors,
- well-developed and diversified R&D base (45 universities, numerous R&D units, over 181 000 students),
- active cross-border cooperation thanks to the location near the Czech and Slovakia borders,
- well-developed road and railway transport, as well as telecommunication infrastructure, international Airport "Katowice" in Pyrzowice ensuring domestic and international transport, rail transport – the so-called Metallurgical Broad-gauge Line (LHS), proximity of the Czech and Slovakia borders,
- variety of investments offer: industry, services, development and modernization of infrastructure, tourism and recreation, agriculture,
- investment promotion incentives: Special Economic Katowice Zone offering ready to be acquired grounds for investments in automotive sector, income tax reductions.

High opportunity sectors

- Automotive
- BPO
- IT
- Tourism
- Ecological investment
- Renewable energy sources

Śląskie



BALTIC SEA

RUSSIA

LITHUANIA

BELARUS

GERMANY

UKRAINE

Śląskie

CZECH REPUBLIC

SLOVAKIA

OPERATOR ARP

OPERATOR ARP - investment area

Our investment area is located in Częstochowa – one of the biggest cities in the central southern Poland. Within 120 km from the city there are 5 out of 15 biggest Polish agglomerations, including the Silesia conurbation with 4.6 million inhabitants – the most urbanized area in Poland.

In the offer of the company "OPERATOR ARP" Sp. z o.o. there are over 250 ha of land of industrial as well as industrial and service character separated from the assets of the privatized Huta Częstochowa S.A. The properties are located within the urban zone of the economic activity of Częstochowa, in the Raków and Mirów districts. In majority those are well-located, fully serviced with municipal utilities and easily accessed "green field" areas. Thanks to that even most demanding investments of production, commercial, logistics and service character might be carried out.

In our offer we also have 150 ha of land perfect for implementing ventures of recreational character. They are situated in the buffer zone of the Eagles' Nests Land-

hensive help during the whole investment process: from the preparation of the offer to the support in a fastest possible settling of formalities and administrative procedures connected with the investment.

In the offer of the Company "OPERATOR ARP" Sp. z o.o. there are sites of various localisations, size and surroundings. The land for sale is divided into 20 complexes (see: www.operatorarp.pl)

The land that we offer has good localisation and a huge investment potential that is proven by qualities such as:

- the possibility of free adjustment of the investment areas accordingly with the needs of every investor,



scape Park in the Kraków-Częstochowa Upland zone – one of the most attractive landscape area in Central and Eastern Europe.

For those who would like to purchase our land we offer not only attractive purchasing conditions, but also a compre-

regardless of his size and branch,
• the access to all utilities necessary for conducting business activities significantly decreases the cost of purchasing and providing utilities – within the area there is a plant that ensures the provision of heating, electricity, natural gas, process steam, drinking and industrial



Information about the Offerer

"OPERATOR ARP" Sp. z o.o.
16 Srebrna Street
00-810 Warszawa
e-mail: biurowwa@operatorarp.pl

Branch Częstochowa
11 Koksowa Street
42-202 Częstochowa
Voivodeship: Śląskie (Silesian)
phone/fax: +48 34 323 06 54
e-mail: poczta@operatorarp.pl

The data in figures

The total area	400 ha
Free investment areas	400 ha
Use of land	<ul style="list-style-type: none">• Production and services facilities• Business activity• Industrial production• Large format commercial facilities

Location Southern Poland

Contact the dedicated support of the investor

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water and the access to foul drain and industrial drainage,

- very good communication and infrastructure for car and railway transport – in our area there is a functional network of internal roads connected with exit roads leading to the city center as well as an internal railway network,
- nearby the offered properties there is an important traffic artery in Poland – DK1 route, linking Gdańsk with Śląsk (Silesia), Cracow and their international airports. There is a plan of building the A1 motorway on the other side of the city.
- the property is situated far from the residential area,
- in the neighbourhood there are industrial plants that can be a support to the investor's production thanks to the provision of the components or intermediate products.

We guarantee a comprehensive help at every stage of the investment process for those who are interested in our offer. Our clients can count on, in particular:

- preparation of the plan of the visit and its comprehensive service,
- efficient search for a property in order to meet the Client's needs,
- comprehensive preparation of the land for the implementation of the investment project,
- optimum preparation of the concept for the land use,
- help in the contacts with the local and administrative authorities and economic organisations in the region,
- support in administrative processes (obtaining permissions and decisions),
- legal counseling, in particular in the scope of preparing documents necessary for concluding the deal.

Located Częstochowa

Częstochowa is located in the central southern Poland, at the meeting point of four provinces and the Silesian conurbation – in the centre of the biggest market of Central and Eastern Europe. The city is a capital and the biggest industrial centre of the northern part of the Śląskie (Silesian) province – a region with the best accessibility and transport infrastructure in Poland. Częstochowa is cut through with one of the major thoroughfares of Poland – DK1 (Gdańsk-Warsaw-Śląsk [Silesia]), and will also soon be cut through with the A1 motorway, connecting Scandinavia with the countries of the Southern Europe.

Częstochowa is the 13th largest city in Poland. The area of 160 km² is inhabited by 234.3 thousand people. The city has a relatively cheap, but highly educated workforce. 9 higher education facilities in Częstochowa are attended by more than 22 thousand students. For investors this means the availability of the personnel perfectly adapted to the requirements of the modern economy.

Częstochowa offers investors one of the best possible local tax relief system in Poland - real property tax exemption.

www.operatorarp.pl



City of Gliwice

Gliwice - Old City New World

The city of Gliwice is located in the largest Polish metropolitan area – the Silesia conurbation, and at the intersection of two European transit corridors the A1 and A4 motorways, that constitute the biggest highway intersection in this part of Europe.

HISTORIC CITY CENTRE



The city development is based on new technologies, the automotive industry and logistics. Thanks to its convenient location and the pro-investment policy of the municipal authorities, the Gliwice Subzone of the Katowice Special Economic Zone, the Nowe Gliwice Centre of Education and Business and the Silesian Logistics Centre are thriving. The number of small and medium enterprises in the city is steadily increasing.

NOWE GLIWICE CENTRE OF EDUCATION AND BUSINESS



There are two universities offering fields of study that are crucial for economy and the Science and Technology Park, called Technopark, which supports innovative technologies in business. The city provides its citizens with wide range of recreational and cultural activities. The historically significant Gliwice Radio Tower, the tallest wooden structure in the world, is a symbol of the city.

GLIWICE SUBZONE OF THE KATOWICE SPECIAL ECONOMIC ZONE



Information about the Offerer

Municipal Office in Gliwice
21 Zwycięstwa Street
44-100 Gliwice, Poland
phone: +48 32 231 30 40
e-mail: boi@um.gliwice.pl
www.gliwice.eu

The data in figures

The total area 134.2 km²

Free investment areas 80 ha

Use of land

- Industry
- Services
- Trade

Location Souther Poland

Other large cities in the region Katowice, Zabrze, Bytom

The total population 186 347

Contact the dedicated support of the investor

Katarzyna Kobierska, Marcin Łazowski
City Development Bureau
Municipal Office in Gliwice
phone: +48 32 239 11 00
e-mail: brm@um.gliwice.pl



Some of the city's awards:

- An Innovative Self-Government
(1st place in the ranking of self-governments of the Rzeczpospolita daily in 2009)
- A Leader Supporting SMEs
(a winner of the nationwide programme of the Regional Chamber of Commerce in Katowice, 2011)
- A Business-Friendly City
(1st place in the ranking of the Newsweek Polska weekly, 2012)
- Mayor of Gliwice, Zygmunt Frankiewicz - the fourth place among 15 best mayors of Polish cities
(in the ranking of the Newsweek Polska weekly, 2012)
- A Leader in terms of Investment Spendings in Silesia
(acc. to the list of the Metropolitan Association of Upper Silesia, 2013)

Representative old Gliwice Foundry Management building in the very centre of the city

Sale of the right of perpetual usufruct together with the ownership right to the building. The real estate is located in the very centre of Gliwice, with a building of the former management of Gliwice Steelworks. The building consists of two parts, a taller three-storied one, adjacent to ul. Mitręgi, and a lower two-storied one, adjacent to ul. Piwna (usable floor area: 3.074 m²). Plot No. 296 and 297.

TECHNICAL INFRASTRUCTURE:

Sewage system, water pipeline, power supply system

SURFACE AREA:

0.2506 ha

INTENDED USE:

Areas of various services

TRANSPORT ACCESSIBILITY:

The real estate is located within the territory of the planned New Centre of Gliwice, in the close vicinity of the railway station and FORUM shopping gallery. Access to Poland's largest transport hub constituting a junction of the A1 and A4 motorways takes ca. 10 minutes (5 km)

Investment area next to the biggest motorway hub in Central Europe

Undeveloped real estates, located in the direct vicinity of Poland's largest motorway hub, as well as a the largest shopping facility in Central and Eastern Europe. Plot 537/2 – 0.9519 ha, Plot 538/2 – 1.1070 ha. The real estates are planned to be sold jointly.

TECHNICAL INFRASTRUCTURE:

Sewage network (in the distance of 100 m), water supply system, as well as power and gas supply system within the territory of the plot

SURFACE AREA:

2.2759 ha

INTENDED USE:

Industrial and services areas, commercial and production areas

TRANSPORT ACCESSIBILITY:

Real estates located directly at the junction of the A1 and A4 motorways



Podkarpackie Voivodeship



The data in Figures

The total area	17 845 km ²
The total population	2 103 500
The population density	118 people/km ²
The main city	Rzeszów
The largest city in the region	<ul style="list-style-type: none">• Przemyśl• Stalowa Wola• Mielec• Tarnobrzeg• Krosno• Dębica
Special Economic Zones	<ul style="list-style-type: none">• Mielec Special Economic Zone• Tarnobrzeg Special Economic Zone• Kraków Special Economic Zone
Industrial Parks and Technology	<ul style="list-style-type: none">• Mielec Industrial Park• Industrial Park 'Stare Miasto'• Aeropolis Podkarpackie Science and Technology Park
Investor Assistance Centre	Rzeszów Regional Development Agency ul. Szopena 51, 35-959 Rzeszów www.coi.rzeszow.pl
The Office of the Marshal	ul. Łukasza Cieplińskiego 4, 35-010 Rzeszów www.si.podkarpackie.pl
Voivodeship Office	ul. Grunwaldzka 15, 35-959 Rzeszów www.rzeszow.uw.gov.p
International Airport	Rzeszów-Jasionka

Presentation of the Region

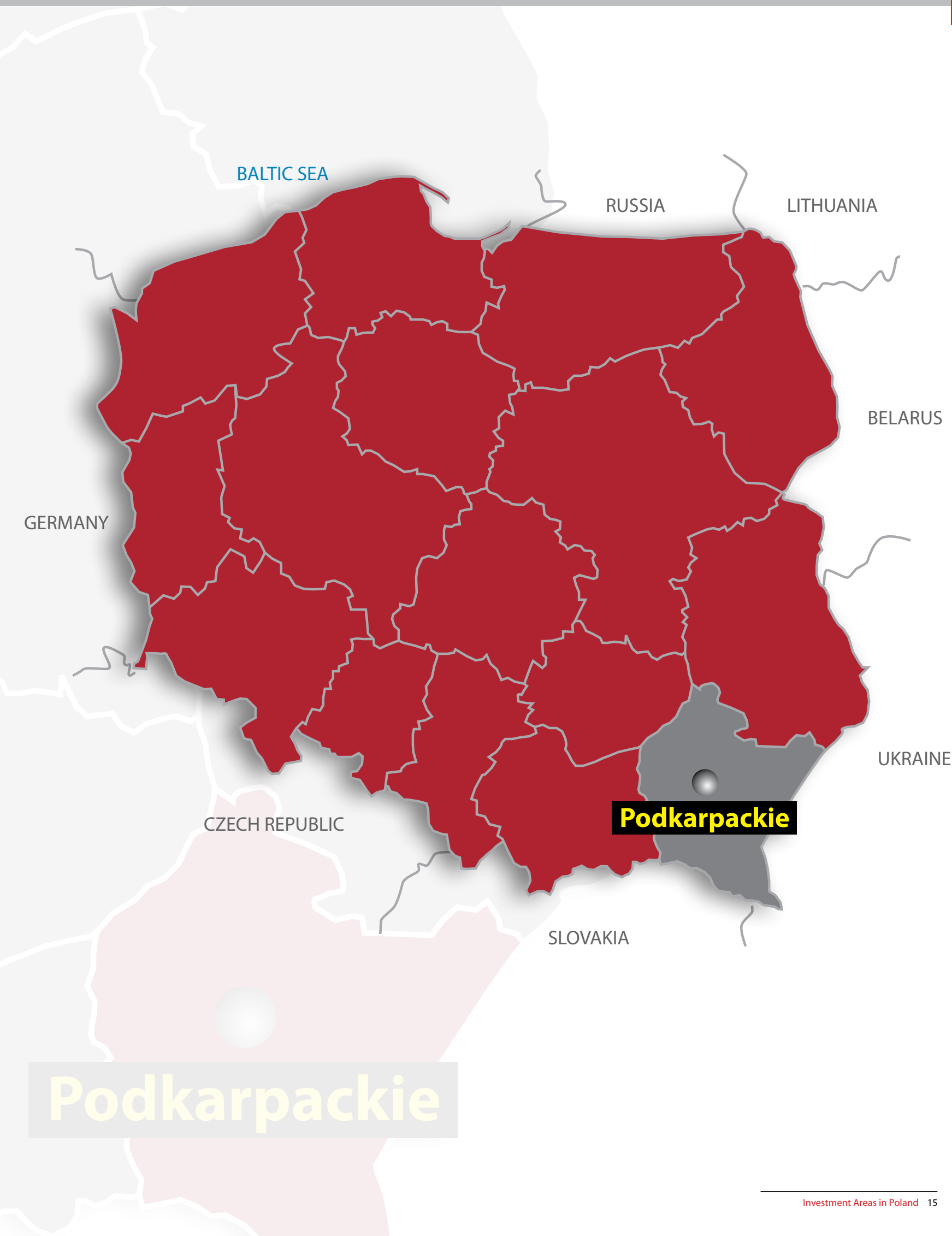
Podkarpackie is located in southeastern Poland with a capital in Rzeszów. Due to favorable location, business friendly areas (Special Economic Zones, Science and Technology Parks) and many clusters (e.g. Cluster IT) there are 150 500 enterprises in Podkarpackie, of which over 1000 with foreign capital. The region is highly industrialized and oriented especially on aviation, electromechanical, biotechnology, IT and chemical industry. Podkarpackie is a place of a large concentration of aviation industry, in our region operates Aviation Valley Association - an unique cluster where numerous world players cooperate with each other - PZL Aircraft Mielec - Sikorsky, MTU Aero Engines, Pratt&Whitney – WSK Rzeszów, Goodrich Aerospace Poland Sp. z o.o.. Existing Rzeszów - Jasionka International Airport offers numerous international connections. The region is ready to welcome investors and facilitate their investments. Spread your wings in Podkarpackie.

Advantages of the voivodeship

- closeness of developing markets of eastern European countries,
- Eastern border of the EU,
- Special Economic Zones, Technological Parks - business friendly areas,
- large potential in the electro-mechanical and chemical sectors, as well as strong academic background,
- dynamically developing cooperation of companies within the "Aviation Valley" Association,
- investments – many international companies set up in the region,
- structure of the population age that support the economy development,
- well-developed network of NGOs supporting regional development,
- well-educated personel and relatively low labor costs,
- competitive prices of investment lands,
- well-developed transport network (road, railway and flight connections).

High opportunity sectors

- Aviation
- Information Technology
- Founding



BALTIC SEA

RUSSIA

LITHUANIA

BELARUS

GERMANY

UKRAINE

CZECH REPUBLIC

Podkarpackie

SLOVAKIA

Podkarpackie

Stare Miasto – Park Sp. z o.o.

The Industrial Park of Leżajsk Commune – Space for Good Investments

The basic field of activity of the Industrial Park of Leżajsk Commune is providing access to properties with full infrastructure for rent, tenancy or sale with the purpose to conduct business activity on preferential terms as well as support of overall development for small and medium, as well as large companies acting within the Park.

Managing body

Stare Miasto-Park Ltd. is the managing body of the Industrial Park of Leżajsk Commune. The company runs two activities: communal and commercial.



Localization

The country's favourable localisation in the centre of Europe facilitates comfortable access to the markets of Germany, Ukraine and other countries of Western and Eastern Europe. Poland still offers one of the lowest labour costs in Europe as well as a highly qualified workforce. Economic growth, the availability of European funds and other investment incentives contribute to Poland's investment attractiveness for foreign investors. Poland remains the top potential investment destination for foreign direct investments in mid-eastern Europe.

The Industrial Park of Leżajsk Commune is located on the outskirts of Leżajsk in Podkarpackie Voivodeship in two places in Leżajsk Commune: Wierzawice and Stare Miasto. Three communication routes pass through Leżajsk: national road no. 77, regional roads no 877 and 875.

Distances:

- 49 km from Rzeszów
- 45 km from the nearest international airport "Rzeszów-Jasionka"
- 25 km from the express road S19 – to be constructed
- 25 km from the motorway A4– under construction
- 70 km from border crossing with Ukraine
- 235 km from border crossing with Belarus
- 137 km from border crossing with Slovakia

The Industrial Park of Leżajsk Commune is a location for investors who are searching for friendly investment climate which provides stable and well-balanced development of every undertaking.

Special Economic Zone

The Industrial Park of Leżajsk Commune operates within Special Economic Zone (SEZ) Euro-Park Mielec. The sub-zone is comprised of land totalling 21 ha and is situated in two locations: Wierzawice and Stare Miasto. For investors, the SEZ is a space which provides exceptional terms of rapid return on investment and effective entrepreneurship; owing to long-term tax concessions and other conveniences.

The Leżajsk subzone of Special Economic Zone offers assistance to entrepreneurs in the form of exemption from corporate income tax, constituting regional aid, which is granted for:

- the costs of a new investment
 - permissible aid is 50% of investment expenditures incurred for large entrepreneurs; 60% for medium, 70% for small
- the creation of new workplaces
 - permissible aid is 50% of two year's worth of labour costs for newly employed for large entrepreneurs, for small and medium – 70% and 60% respectively

Offer

- investment land with technical infrastructure (tenancy, sale)
- production and warehouse buildings (rent, sale)
- offices (rent)
- possibility of acquiring exemption from tax on property and means of transport
- possibility of placing the investment in Special Economic Zone (subzone of Special Economic Zone Euro-Park)



Information about the Offerer

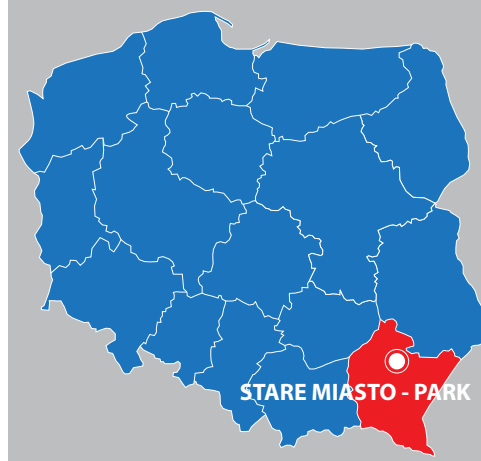
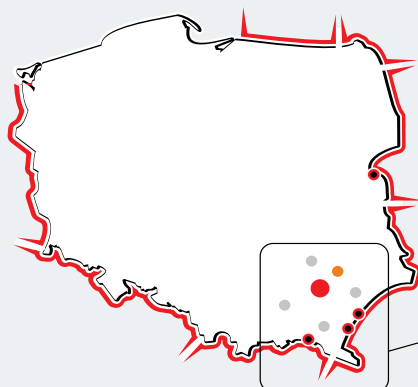
„Stare Miasto – Park” Sp. z o.o.
Wierzawice 874
37-300 Leżajsk, Poland
Voivodeship: Podkarackie
e-mail: sm-park@sm-park.pl
www.sm-park.pl

The data in figures

The total area	36 ha
Free investment areas	14 ha
Area available in the Special Economic Zone	10 ha
Use of land	<ul style="list-style-type: none">• Production• Storage• Magazines• Services• Trade area
Location	South-east Poland
Closest city	Leżajsk

Contact the dedicated support of the investor

Paulina Pisarczyk
Project Manager
phone/fax: +48 17 242 60 94
e-mail: paulina.pisarczyk@sm-park.pl



- Mielec) and acquiring temporal income tax exemption
- support in the implementation of formal and administrative procedures
- assistance for entrepreneurs at every stage of one's business activity

We are willing to establish cooperation with

- entrepreneurs who are looking for new localizations to start new businesses and investment projects
- financial institutions interested in financing investment projects
- institutions specializing in acquiring investors

Offer of production hall H3 2000 m² (sector A9)

The area with the production hall		
Area of the plot under the hall	0.8598 ha	
Area of the plots constituting sector A9	2.8376 ha	
Production hall		
Gross covered area:	1993.15 m ²	
Nett area, including:	1933.33 m ²	
Production area	1706.61 m ²	
Mezzanine area	226.72 m ²	
Capacity	15845.54 m ²	
Number of storeys	1	
Height	8.33 m	
Height to the lights	5 m	
Commissioning of the hall	2009 r	
Use of property	Production hall	
Infrastructure	Media in the area with the hall	
	Energy	YES
	Sewage system	Ø 300
	Storm water swagare	Ø 300 / Ø 600
	Water	Ø 90 / Ø 160
	Gas	Ø 40 / Ø 200
	Central heating	In social-office part
	Heating of the hall	Gas radiants
Telecommunication connection	YES	
Form of usage	Rent, sale	

Business surrounding

Leżajsk Commune is situated in the north-eastern part of Podkarpackie Voivodeship. Included in this area are Valley of Lower San, Kolbuszowski Plateau and Tarnogrodzki Plateau. The area of Leżajsk Commune is divided into two parts: north and south separated from each other by another administrative unit – Leżajsk City. The industrial district is located within the city and commune and gathers such companies as: Leżajsk Brewery – Żywiec Group, ZPOW 'HORTINO'; Chemical plant 'Organika-Sarzyna', Grupa SILIKATY, PHILIP MOR-

RIS and BMF Poland. This is an administrative, economic, cultural and educational centre for neighbouring localities.

- Leżajsk – has about 15 000 inhabitants and a land surface of 21 km²
- Leżajsk Commune – has nearly 20 000 inhabitants and its land surface is 200 km²

Local authorities pay special attention to ensure sustainable development of our town by creating facilities for operating business activity. A quick and efficient way of investors services obtaining an administrative decision is guaranteed by Leżajsk Commune, which holds 'The Quality Management System ISO 9001:2000'.

Apart from a well-developed infrastructure and relatively low business costs, Leżajsk offers wide access to a labour force, what is crucial for investors when selecting the most convenient location.

The largest investors in the region

Investor	Industry
BMF Polska Sp. z o.o.	construction
Organika	chemistry
Philip Morris	tobacco
Browar Leżajsk	brewery
Hortino	food



Wielkopolskie Voivodeship



The data in figures

The total area	29 826 km ²
The total population	3 419 400
The population density	115 people/km ²
The main city	Poznań
The largest cities in the region	<ul style="list-style-type: none">• Konin• Ostrów Wielkopolski• Kalisz• Leszno• Piła
Special Economic Zones	<ul style="list-style-type: none">• Wałbrzych Special Economic Zone• Łódź Special Economic Zone• Kamienna Góra Special Economic Zone• Kostrzyńsko-Słubicka Special Economic Zone
Industrial Parks and Technology	<ul style="list-style-type: none">• Nickel Technology Park• Poznań Science and Technology Park• Luboń Technology Park• Śrem Investment Park
Investor Assistance Center	Investor Service Centre ul. Przemysłowa 46, 61-541 Poznań www.umwww.pl
The Office of the Marshal	aleja Niepodległości 18, 61-713 Poznań www.umwww.pl
Voivodeship Office	aleja Niepodległości 16/18, 61-713 Poznań www.poznan.uw.gov.pl
International Airport	Poznań-Ławica

Presentation of the Region

Wielkopolskie voivodeship is situated in the west-central part of Poland. Characteristic features of this region are its balanced economic development, high degree of industrialisation, high technological level and openness towards foreign markets. The Poznań International Fair that has been held in Poznań, the regional capital, for 80 years is an event that exerts considerable influence on the country's economic level and provides the business community with an opportunity to operate on the many -million strong Eastern European market. The region is known for its motor, BPA and logistics sectors. Wielkopolska is also an agricultural region whose farms reflect European standards.

Advantages of the voivodeship

- strong economic activity, high regional GDP,
- strong investment activity of the local authorities connected with EU funds raising and with the development of self-financing,
- high industrial efficiency,
- diversified economic structure,
- large participation of the private sector in economics of the region,
- Poznań International Fairs – place for organizing big international events (congresses, conferences, sport and cultural events),
- well-developed technical infrastructure and business assistance institutions,
- relatively low cost of labour: the average wage in the region equals 91% of the national one,
- high quality of labour market – big supply of highly qualified employees knowing foreign languages,
- high investment activity of the voivodeship: 34,6% - the highest industrial investment outlays (for Poland - 29,8 %),
- convenient road connections: main East-West transit corridor, motorway A2 between Konin and Nowy Tomyśl, ring-road around Poznań, modernization of the S5 route and convenient railway connections – all this improve staff mobility in Wielkopolskie region, domestic and international airport, Odra water route,
- high share of foreign capital – 3rd place in the country (about 7 mld USD),
- large areas of high-quality agricultural land.

High opportunity sectors

- Automotive Sector
- BPO
- Logistics

Wielkopolskie



Clip Logistic Centre

CLIP Logistic Centre

CLIP Group is a logistic operator of industrial and warehouse facilities with the total area of 200,000 m² located in Swarzędz, near Poznań, and 100 ha of investment land, out of which as much as 80 ha were included into the Kostrzyn-Słubice Special Economic Zone. The CLIP facilities include class A warehouses, private railway sidings and a container terminal with the capacity of 1000 TEU. The facilities are located in the immediate vicinity of the trans-European railway corridor E20 (Paris - Beijing) and are conveniently connected to the A2 motorway and the S5 express road.

Within the Special Economic Zone in Swarzędz there are three warehouse-production facilities with the total area of 116.000 m²: CLIP 2 is a class A high storage warehouse with the area of 48.000 m², with its own railway siding and a modern charge-discharge railway ramp; CLIP 3 - a class A warehouse with the area of 28.500 m²; and a new built CLIP 5 with the area of 36.000 m² which will be ready for lease in December 2013.

The facilities are complemented by a Multimodal Container Terminal located right next to CLIP 2 warehouse and the international E20 railway route. The Terminal has the capacity of 10 000 TEU a year and the storage capacity of 1000 TEU. The Terminal has two 750-m long discharge tracks. Everyday, the Terminal services a regular shuttle train connection from Rotterdam to the CLIP Terminal in Swarzędz,

sanitary and water sewage systems, IT systems and fire systems (water tanks, sprinklers).

Advantages of the zone

Excellent location by the E92 national road, S5 express road, A2 motorway and the E20 railway line; logistic platform for the entities located in the zone: three warehouses with the area of 116.000 m², private railway sidings and a container terminal with the capacity of 1000 TEU, investment land with environmental, zoning and building permits.

Transportation network

CLIP is located by the trans-Eurasian transit corridor - the E20 Beijing-Moscow-Warsaw-Berlin-Paris railway route, by the S5 express road and A2 motorway.



launched in cooperation with ERS Railways. The train has the capacity to transport 1100 tons of goods, and comprises of wagons for containers of all sizes, including high cube, and trailers, including mega trailers.

More investments are planned for 2014, when CLIP will open a new extended terminal with the capacity to service 150.000 TEU a year, with two 750-m long discharge tracks on which simultaneous handling of two train sets will be possible. The terminal will be connected directly to the E20 railway line, and, via a new flyover, to the E92 national road, S5 express road and A2 motorway. Also, another 70.000 m² of warehouse space is planned for construction in the years 2014-2015.

Land characteristics

Flat, 12 MW electric energy connection, high- and medium-pressure gas pipeline, runoff retention systems, private

Investors and business partners:

Volkswagen Poznań, Volkswagen Logistics, Volkswagen Group Polska, Imperial Tobacco, ERS Railways, DB Schenker, Mosolf Automotive Railway GMBH, CTL Logistics, Exide, Pfeifer & Langen, Blum, Erontrans, Samskip, LKW Walter, Kompania Piwowarska, R. Twining and Company, Delfo Polska, Plastal, Visteon Poland, KS Logistik, IAC, Tenneco Automotive Polska, Fastek Fitting Polska, Bertelsman, CECA – Arkema, BSC Drukarnia Opakowań, Mercedes-Benz Polska, Gefco – Peugeot, Citroen, Opel, Daimler AG, GM, Mazda

Tax reliefs and exemptions for investors

SEZ gives investors a possibility to obtain tax exemptions until 2026. An investor running his business activity within the SEZ is entitled to regional aid in the form of income tax exemptions for the investment and creation of new jobs. It is also possible for an investor to receive local tax exemptions.



Information about the Offerer

CLIP Group

6 Rabowicka Street
62-020 Swarzędz-Jasin
Voivodeship: Wielkopolskie
phone: +48 61 89 75 300
fax: +48 61 81 81 389
e-mail: sekretariat@clip-group.com
www.clip-group.com

The data in figures

The total area	800 000 m ²
Free investment areas	500 000 m ² /50 ha
Use of land	<ul style="list-style-type: none">• Business activity• Economic development• Large format commercial facilities

Location Western Poland

Other large cities in the region Poznań, Konin, Kalisz

Contact the dedicated support of the investor

Investor Assistance:

Agnieszka Hips
CLIP Group
phone: +48 663 792 802
e-mail: agnieszka.hips@clip-group.com

Administrator of the zone:

Kostrzyn-Słubice Special Economic Zone S.A.
22 Orła Białego Street
66-470 Kostrzyn nad Odrą





Łódzkie Voivodeship



The data in figures

The total area	18 219 km ²
The total population	2 604 000
The population density	139 people/km ²
The main city	Łódź
The largest cities in the region	<ul style="list-style-type: none">• Piotrków Trybunalski• Pabianice• Tomaszów Mazowiecki• Bełchatów• Zgierz
Special Economic Zones	<ul style="list-style-type: none">• Łódź Special Economic Zone• Starachowice Special Economic Zone
Industrial Parks and Technology	<ul style="list-style-type: none">• Bełchatowsko-Kleszczowski Industry and Technology Park• Kutno Agro-Industrial Park• Łódź Regional Science and Technology Park• Zgierz Industrial Park Boruta
Investor Assistance Center	Investor Service Centre ul. Moniuszki 7/9, 90-101 Łódź www.lodzkie.pl
The Office of the Marshal	al. Piłsudskiego 8, 90-051 Łódź www.lodzkie.pl
Voivodeship Office	ul. Piotrkowska 104, 90-926 Łódź www.lodz.uw.gov.pl
International Airport	Łódź-Lublinek

Presentation of the Region

Łódzkie voivodeship is known for being situated at the centre of Poland and Europe. It is a major academic centre as well as an intensively developing economic region backed by strong industrial traditions. Thanks to foreign investments, in recent years it has become Europe's biggest household-appliance cluster. The Łódź region stands out for its high degree of urbanisation (64.8% of its inhabitants live in 42 towns). The main economic centre is the Łódź Metropolitan Area.

Advantages of the voivodeship

- region centrally sited,
- well developed infrastructure of economics in Łódź,
- large deposits of brown coal - second largest in the country in terms of electric power production,
- one of the highest rates of new private businesses per 1,000 inhabitants in the country,
- significant scientific and research potential,
- strong concentration of land and capital in the hands of individual farmers,
- important resources of thermal waters for use in the power industry, health services and recreation.

High opportunity sectors

- Power Engineering
- Textile industry
- Biotechnology
- Fruit and Vegetable Industry
- Mechatronics
- ICT / New Media

Łódzkie



Lodz Special Economic Zone

Lodz Special Economic Zone – perfect place for investment with the highest possible State Aid level in the European Union



If you are interested in new European markets, hoping to dynamically grow your business, we are pleased to assist you in finding a perfect location for your investment project. We would like to assure you that the Region of Lodz as well as the team of Lodz Special Economic Zone offer everything you are looking for.

Lodz Special Economic Zone is one of the fastest growing economic areas in Poland. We provide you with rich offer of investment sites in the very centre of Poland and Europe, comprehensive service during investment implementation process as well as obtaining significant State Aid in the form of a tax exemption.

We invite you to cooperate with Lodz Special Economic Zone, in the Region of Lodz, in the heart of Poland.

Tomasz Sadzyński
President of Lodz SEZ's Board

Perfect location, tax incentives, rich industrial traditions, and full support in implementation of the investment process make Lodz Special Economic Zone an ideal place for investors willing to develop their business.

Lodz Special Economic Zone means:

- the highest level of State Aid in Europe,
- perfect location in Central Poland,
- very good transport network,
- attractive industrial land,
- comprehensive investor services,
- professional team,
- cooperation with educational facilities and higher education institutions.

Enterprises which would like to start doing business in Lodz Special Economic Zone may benefit from State Aid up to 70 % of eligible investment costs or two-year labour costs.

Lodz Special Economic Zone has a wide investment offer, including both A-class office space, perfect for BPO and IT activities, as well as greenfield sites perfect for the construction of production plants. Numerous investment plots, with utilities and easy access, are available in 45 sub-zones (1290 ha) located in central Poland.

Best recommendation of Lodz Special Economic Zone is its achievements. During 16 years of its operations, 228 permits have been issued, investors have created in total nearly 26 thousand workplaces,

and the value of investments has almost reached 10 billion Polish zlotys. Our investors operate in the following industries: cosmetics and pharmaceuticals, household appliances, BPO, IT, medical equipment, building materials, food processing, packaging, plastics, R&D and logistics.

Basic requirements for obtaining a permit

- new investment of minimum EUR 100 000,
- maintenance of the investment in the region for minimum 5 years (3 years in case of small and medium enterprises),
- maintenance of the employment level for minimum 5 years (3 years in case of small and medium enterprises),
- maintenance of fixed assets for minimum 5 years (3 years in case of small and medium enterprises).

State Aid Level

- **70%** of eligible investment costs or two – year labour costs for small enterprises
- **60%** of eligible investment costs or two – year labour costs for medium enterprises
- **50%** of eligible investment costs or two – year labour costs for large enterprises



LODZ
SPECIAL
ECONOMIC
ZONE

Information about the Offerer

Lodz Special Economic Zone Joint Stock Co.
22/24 Tymienieckiego Street
90-349 Lodz, Poland
Voivodeship: Lodzkie, Great Poland, Masovia
phone/fax: +48 42 676 27 53/54, +48 42 676 27 55
e-mail: info@sse.lodz.pl
www.sse.lodz.pl, mapa.sse.lodz.pl

The data in figures

The total area	1 290 ha
Free investment areas	377 ha
Use of land	Production, storage, logistics, BPO (including IT, accounting, call – centres, R&D)
Location	Central Poland
Other large cities in the region	Piotrków Trybunalski
No. of permits	228

Contact the dedicated support of the investor

Agnieszka Sobieszek
Director in Investment Development Department
e-mail: agnieszka.sobieszek@sse.lodz.pl
phone/fax: +48 42 275 50 52, +48 42 676 27 55

Urszula Wöltjen
Lodz SEZ's Investment Representative for German – speaking countries
e-mail: uwoeltjen@web.de
phone: +49 / (0)171.74 81 395





ANTON HÄRING
The owner of Häring

Reliability and quality – this is our motto in contacts with our Clients. Hence, we have such a good cooperation with Lodz Special Economic Zone, which is driven by similar values. We have one production plant in Bubsheim in Germany and the second one in Lodz SEZ, Piotrków Trybunalski subzone. Both places feel like home to us.



KATARZYNA CHOJNACKA
Financial Director
BSH Sprzęt Gospodarstwa Domowego Sp. z o.o.
(part of Bosch und Siemens Hausgeräte GmbH)

BSH has obtained four business permits to operate within Lodz Special Economic Zone. The company's development within the Zone proves our satisfaction as an investor with professional service, consulting and comprehensive support which we receive before and during implementation of the investment project. It encourages and makes us willing to consider next potential investments. Thanks to Lodz SEZ we can also feel protected against financial risk which comes with investment.



MAREK KAPUŚCIŃSKI
Vice-President Procter & Gamble,
Central Europe P&G.

Investing within Lodz SEZ provides perfect conditions for business activity and great opportunities and growth prospects. The experience of Lodz SEZ in cooperating with foreign business partners and excellent knowledge of local environment helped us in effective implementation of our investment project and quickened administrative processes. Lodz Special Economic Zone is a very important, reliable and trustworthy business partner for us. Not only have we in common logistic and administrative issues connected with our production plant, but also common values such as professionalism, transparency and reliability.



JERZY CZUBAK
Chief Operating Officer, Amcor LTD

We are very happy that our biggest investment project in Central – East Europe was located in Lodz. Two out of our three production plants were built in Lodz Special Economic Zone. It was a perfect decision. We received invaluable help from the Zone and the City – great localisation with all necessary utilities, excellent help in obtaining all important administrative permissions and decisions, as well as good advice which significantly shortened and optimized investment costs.



3rd PLACE IN EUROPE
fDi Global Freezones of the Future 2012/2013,
Financial Times Group

1st PLACE IN EUROPE
the fDi Digital Marketing Awards 2012,
Financial Times Group

**ONE OF THE BEST RATED
BY INVESTORS
SPECIAL ECONOMIC ZONE
IN POLAND IN YEARS
2009-2012**
KPMG Report "Special Economic Zones" Edition 2012

Mazowieckie Voivodeship



The data in figures

The total area	35 558 km ²
The total population	5 242 900
The population density	147 people/km ²
The main city	Warszawa
The largest city in the region	<ul style="list-style-type: none">• Radom• Płock• Siedlce• Pruszków• Ostrołęka
Special Economic Zones	<ul style="list-style-type: none">• Tarnobrzeg Special Economic Zone• Łódź Special Economic Zone• Warmińsko-Mazurska Special Economic Zone• Suwałki Special Economic Zone• Starachowice Special Economic Zone
Industrial Parks and Technology	<ul style="list-style-type: none">• Płock Industrial and Technological Park
Investor Assistance Center	Mazovia Development Agency Plc ul. Nowy Zjazd 1, 00-301 Warszawa www.armsa.pl
The Office of the Marshal	ul. Jagiellońska 26, 03-719 Warszawa www.mazovia.pl
Voivodeship Office	plac Bankowy 3/5, 00-950 Warszawa www.mazowieckie.pl
International Airport	Warszawa, Modlin

Presentation of the Region

Mazowieckie voivodeship and the City of Warsaw, Poland's capital, is the leader of Poland's transformation and the country's most swiftly developing region. It can boast young, well-trained human resources, the lowest unemployment and the highest employment - features attesting to the region's high economic level. The Mazowsze region stands out for its significant degree of internal differentiation. In nationwide terms, it displays great potential in every field: science, research, education, industry and infrastructure.

Advantages of the voivodeship

- area with a large concentration of companies also foreign,
- the highest level of income per citizen,
- location in trans-European transport corridors; well-developed railway network and the largest airport in the country ensuring connections with the big cities in the country and in Europe,
- area with the highest level of innovations, outlays on R&D activities are one of the highest in the country,
- importance of the region is stressed by Warsaw - capital of the country and the region, as well as a city of international importance,
- Warsaw is characterized by the highest dynamics of economic changes in the country, large pool of qualified labour, high rate of privatization in the state sector,
- central siting at the crossroad of commercial routes,
- economics leader: the highest rate of participation in gross domestic product – 21,6% of the Polish GDP,
- first position in Poland in gross domestic product per capita - about 160% average,
- Warsaw Stock Exchange is the largest in the Central Eastern Europe.

High opportunity sectors

- Food industry
- Construction
- BPO



BALTIC SEA

RUSSIA

LITHUANIA

BELARUS

GERMANY

Mazowieckie

UKRAINE

CZECH REPUBLIC

SLOVAKIA

Mazowieckie

POLISH STATE RAILWAYS

POLISH STATE RAILWAYS, Joint Stock Company (PKP S.A.)

Polish State Railways, Joint Stock Company (PKP S.A.) is the owner and manager of a substantial part of the railway and railway station infrastructure in Poland. It manages around 2,5 thousand stations and also owns other properties - including more than 106 thousand plots covering an area of over 101 thousand hectares. Approx. 10 thousand of them have a large commercial potential in locations that are strategic and available for sale.

Wrocław, Kuźniki (Dolnośląskie voivodeship)

Investment properties are located in the downtown area of Wrocław, in Kuźniki area, near shopping malls, modern Municipal Stadium and the Motorway Bypass of the city and within a short distance from the Airport.

- plot numbers: 4/21, 4/22 (1/6 share in the plot); total ground area - 0.876 ha, building floor space - 126 m²; planning information: SUIKZP (urban, city, and town planning)
- plot numbers: 3/7, 4/13; total ground area - 1.358 ha, building floor space 252 m²; planning information: SUIKZP (urban, city, and town planning)
- plot numbers: 4/25, 4/22 (1/6 share in the plot); total ground area - 0.234 ha, building floor space - 807 m²; planning information: SUIKZP (urban, city, and town planning)



Wrocław, Popowice (Dolnośląskie voivodeship)

Undeveloped land plot located in the downtown area of Wrocław, in Fabryczna district, close to Oder River, the former river port Popowice and the Motorway Bypass of Wrocław.

- plot number: 2; total ground area - 1.888 ha; planning information: MPZP (Zoning)



POLSKIE KOLEJE PAŃSTWOWE
Spółka Akcyjna

Information about the Offerer

Department of Real Estate Sales of PKP S.A.,
Headquarters
62 Szczęśliwicka Street
00-973 Warszawa
phone: +48 22 474 90 65
fax: +48 22 474 92 28
e-mail: knds@pkp.pl
www.pkpsa.pl

Contact the dedicated support of the investor

Director of Sales Department
Grzegorz Tomaszewski
mobile: +48 603 99 22 36
e-mail: grzegorz.tomaszewski@pkp.pl



Łódź, Al. Ofiar Terroryzmu (Łódzkie voivodeship)

Attractive investment lands located in the eastern part of Łódź, close to the newly established factories: Dell, Indesit and Bosch & Siemens Hausgeräte, Panattoni and SEGRO logistics centres and the A2 motorway (junction Andrespol - under construction).

- plot numbers - 1/141, 1/143; total ground area - 5.355 ha, planning information: MPZP (Zoning)
- plot numbers - 71/144, 71/149; total ground area - 5.123 ha, planning information: MPZP (Zoning).

Łódź, Tuwima (Łódzkie voivodeship)

The real estate (office-administrative complex) is situated in the unique location, right to the Łódź representative street - Piotrkowska - one of the longest shopping streets in Europe and around the revitalised New Centre of Łódź.

- plot number: 169/5; total ground area - 0.878 ha, building floor space - 13 750 m²; planning information: SUIKZP (urban, city, and town planning).

Warszawa, Ordonia (Mazowieckie voivodeship)

Beautifully situated property in the downtown area of Warsaw, close to major routes and several shopping centres. In the near future communication in this area will be improved by the planned NS collision-free route and the second metro line which is under construction.

- plot numbers: 21/42, 21/46, 21/50; total ground area - 2.686 ha; planning information: SUIKZP (urban, city, and town planning).

Gębarzewo, Żydowo (Wielkopolskie voivodeship)

Fenced and lighted Investment plot covering area of more than 40 hectares, situated near Gniezno, having a good connect with the A2 motorway and S5 expressway.

- plot numbers: 24, 25, 26, 28, 29, 31/5, 32/6, 33/2, 38/4, 40 area 0015 Żydowo; 1/1, 11, 13 area 00001 Gniezno; total ground area - 40 ha; planning information: SUIKZP (urban, city, and town planning).

Poznań, Arcybiskupa Dymka (Wielkopolskie voivodeship)

Attractive real estate located in Nowe Miasto area near the Malta sports and recreation complex, housing estates and shopping centres (Ikea, Decathlon, M1, Galeria Malta).

- plot number: 21/10; total ground area - 1.57 ha, building floor space - 1 439 m²; planning information: SUIKZP (urban, city, and town planning)

Poznań, Wolne Tory (Wielkopolskie voivodeship)

Attractive investment land located in the very city centre, in the immediate vicinity of the new Poznań Central Station, the bus station and a Poznań City Centre shopping mall. The estate is a part of so called "Wolne Tory", the area covering several dozens of land hectares, which, in the coming years, is likely to turn into a new business and residential area of the city.

- plot number: 3/33; total ground area - 2.835 ha; planning information: SUIKZP (urban, city, and town planning).



Kujawsko-pomorskie Voivodeship



The data in figures

The total area	17 970 km ²
The total population	2 066 100
The population density	115 people/km ²
The main city	Toruń, Bydgoszcz
The largest city in the region	<ul style="list-style-type: none">• Bydgoszcz• Włocławek• Grudziądz• Inowrocław
Special Economic Zones	<ul style="list-style-type: none">• Pomeranian Special Economic Zone
Industrial Parks and Technology	<ul style="list-style-type: none">• Bydgoszcz Industrial and Technology Park• Grudziądz Industrial Park• Toruń Technology Park• Solec Kujawski Industrial Park• Vistula Park Świecie
Investor Assistance Center	Investor Service Centre Plac Teatralny 2, 87-100 Toruń www.coi.kujawsko-pomorskie.pl
The Office of the Marshal	Plac Teatralny 2, 87-100 Toruń www.kujawsko-pomorskie.pl
Voivodeship Office	ul. Jagiellońska 3, 85-950 Bydgoszcz www.mazowieckie.pl
International Airport	Bydgoszcz

Presentation of the Region

Kujawsko-pomorskie voivodeship is situated in the north-central part of the country. It is a region with industrial and agricultural traditions. In addition to its well-developed agricultural, chemical and industrial machine sectors, the voivodeship in recent years boasts the presence of an electronics-sector investor - the factory of Japanese electronics giant Sharp and its sub-suppliers in Łysomice near Toruń. The voivodeship has extensive research facilities, headed by Toruń's Nicholas Copernicus University and including research centres facilitating the flow of new technological solutions to the industrial sector such as Toruń's Technology Transfer Centre.

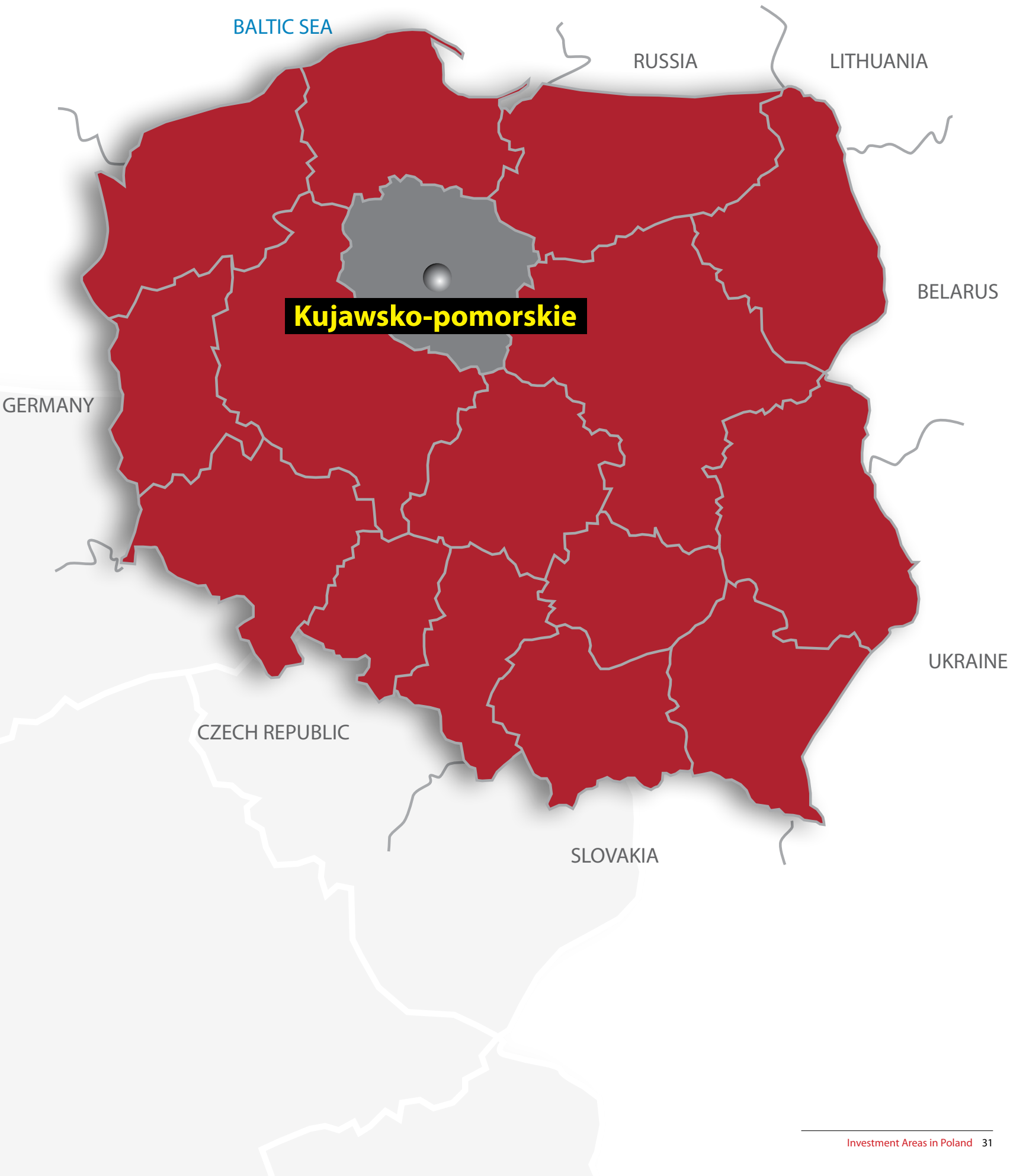
Advantages of the voivodeship

- industrial traditions,
- highly qualified, cheap and available pool of engineers and technical specialists,
- strong scientific-research base (numerous tertiary institutions, strong scientific centres),
- leading role in Poland in terms of creating information society,
- concentration of population: Bydgoszcz-Toruń agglomeration, strong sub-regional centres,
- efficient agricultural production and well-developed food processing
- ecologically pure environment supported by advanced projects in the fields of environmental protection,
- well-developed social infrastructure (leading medical centres, strong spa base important cultural institutions and efficient education system).

High opportunity sectors

- Electronics
- Electro-mechanical
- Chemical
- Food production

Kujawsko-pomorskie



City of Brześć Kujawski

Brześć Kujawski is the communication heart of Poland - the place open for new technologies, that arise in Brześć Special Economic Zone - within A1 motorway junctions

We offer you professional assistance in the implementation of new projects in Brześć Special Economic Zone which covers an area of 470 hectares of land owned by private owners, municipality of Brześć Kujawski and Agricultural Property Agency. The area located within the Pikutkowo junction, connected within the national road No. 62 and the proposed bypass route of Brześć Kujawski is the strategic investment ground. The Zone has a Land Use Plan and there are power grid, water supply, sewage, gas installation and internal and technological roads in its area. The municipality provides many preferential investment incentives for new investors as well as a number of design and investment process conveniences. The Town Council Ordinance IX/73/2011 offers exemption from real property tax.



Brześć Economic Zone is a splendid place for locating your business - prepared investment sites, favourable climate and space for development, as well as professional help are distinguishing features and qualities of investment.

The excellent situation of investment areas and a suitable location on one of the most important traffic routes offers excellent prospects for development as well as unlimited opportunities for investors and for this reason is a strategic advantage of Brześć Economic Zone. Among the most important road arteries located in the municipality there are: A1 motorway linking the ports of Gdańsk and Gdynia with southern part of Poland (we are the only municipality in Poland in which two motorway junctions "Brzezie" and "Pikutkowo", toll stations, rest areas and highway maintenance sections are located) and a network of national and provincial roads.

Trunk road No. 62, located at a distance of 10 km from trunk road No. 1, nearest international airports in Bydgoszcz, Poznań and Łódź and international airport in

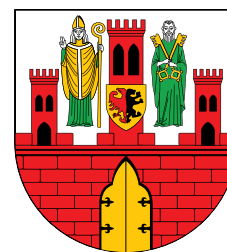
Warsaw (located at a distance of 165 km) become characteristic features of Brześć Economic Zone.

Location in centre of Poland, in the south-eastern part of Kujawsko-Pomorskie voivodeship, near Włocławek (100 000 inhabitants), at a distance of 195 km from ports of Gdynia and Gdańsk and 165 km from international airport in Warsaw, and close to the most important big cities of the region, being the administrative centres of the area makes the investment grounds attractive to investors from Western and Eastern Europe.

The establishment of land development plan, preferential incentives for new investors and a number of conveniences in designing and investing, favourable climate and space for development create good conditions for growth of entrepreneurship and investments.

Thanks the investments conducted in BEZ, the sewage system and water supply have been made, and in the near future, we plan to initiate road building and lighting. The efforts of local authorities for creating attractive investment conditions have been recognized on a national scale. The jury of the 2012 "Grunt na medal" contest have awarded one of the prepared areas.

Prepared and conducted promotion actions contribute to maintaining a positive image in the region. For several



Information about the Offerer

City Hall of Brześć Kujawski
Plac Władysława Łokietka 1
87-880 Brześć Kujawski
Voivodeship: Kujawsko-pomorskie
phone: +48 54 231 63 10
fax : +48 54 231 63 24
e-mail: urzad@brzesckujawski.pl
www.brzesckujawski.pl

The data in figures

The total area	151 km ²
Free investment areas	470 ha
Use of land	<ul style="list-style-type: none">• Industry• Production• Logistics excluding investments harmful to the environment
Location	Central Poland
Other large cities in the region	Włocławek
The total population	11 500

Contact the dedicated support of the investor

City Hall of Brześć Kujawski
Wojciech Zawidzki - Mayor
phone: +48 54 231 63 10

Tomasz Chymkowski
phone: +48 54 231 63 26

Katarzyna Talarek
phone: +48 54 231 63 25



INVESTMENT AREAS IN BRZEŚĆ KUJAWSKI



years, the Municipality has remained at the forefront of Kujawsko-Pomorskie voivodeship in getting EC funds for implementation of its major tasks.

The major advantage of Municipality are human resources. The unemployment rate in the region, secondary education profile, giving the opportunity of the adjusting the educational profile to the investor needs, nearness to universities offering a wide range of learning opportunities in the fields of both, technical and humanistic science make every investor will find qualified staff necessary to conduct business.

The status of health resort municipality and Wieniec-Zdrój spa having unique therapeutic possibilities cause that the surroundings has a lot to offer for those who prefer leisure. The ongoing construction of a recreational and medicinal complex, which will soon become a European spa and health resort will provide professional care for about 900 clients.

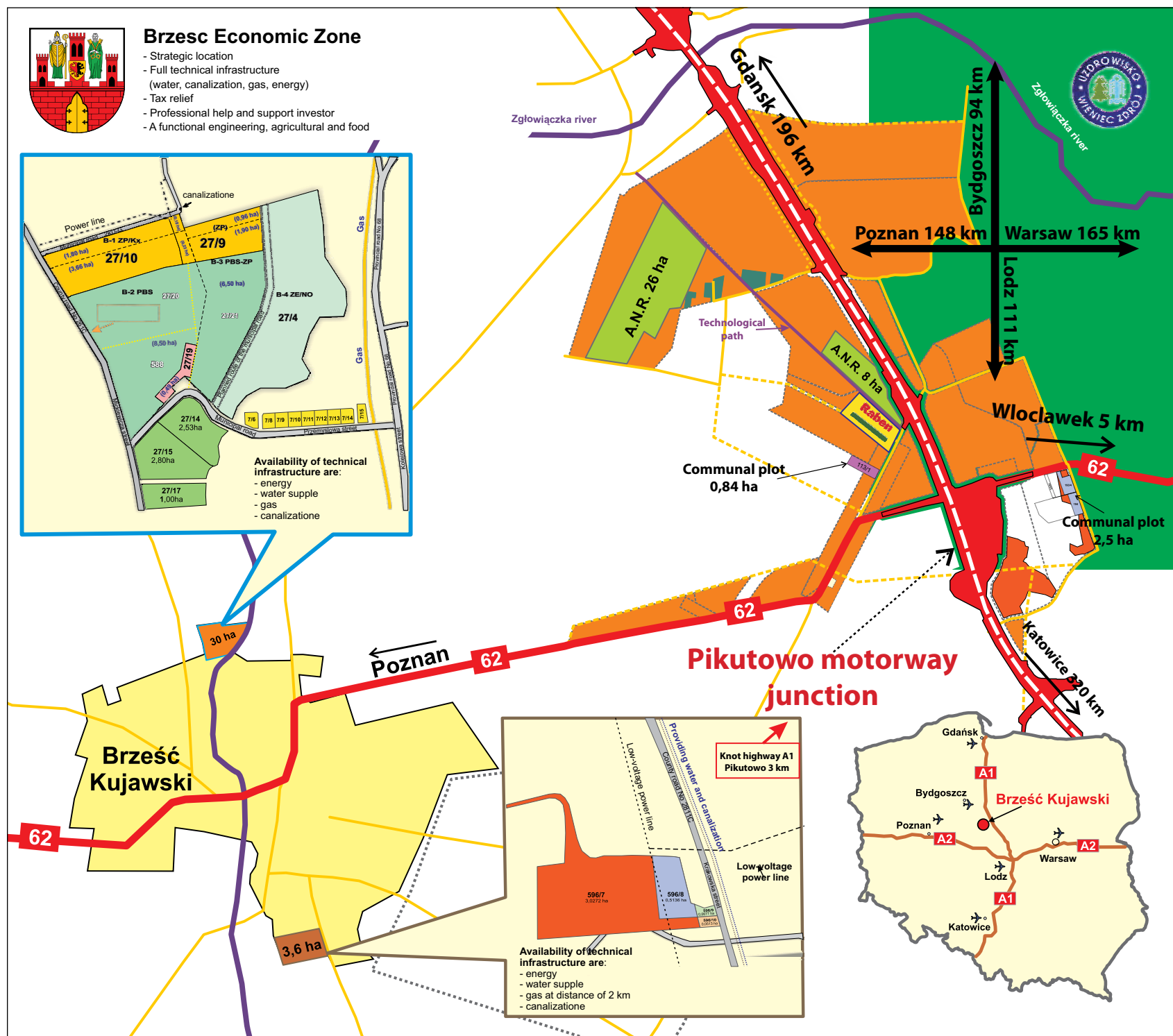
Good and fertile soil, professional farms, fast developing businesses and factories that is our best advertising. Municipality places great emphasis on improving the quality and comfort of life. A very good educational,

sports and recreational base - the municipal stadium, which is leisure and sport centre, multi-purpose sports fields, modern playgrounds, skate park and pedestrian and bicycle paths encourage active recreation.

Outstanding residential areas, enjoying a great popularity building plots, high activity of local communities, a growing number of cultural and social events make Brześć Kujawski become a place where inhabitants, investors and tourists feel good.

We invite you to Brześć Kujawski, where the rich history is supported by modern infrastructure, encouraging locating new businesses, and health resort municipality status guarantees conditions for rest and rehabilitation.

more information: www.inwestuj.brzesckujawski.pl



Pomorskie Voivodeship



Pomorskie

The data in figures

The total area	18 310 km ²
The total population	2 283 500
The population density	124 people/km ²
The main city	Gdańsk
The largest cities in the region	<ul style="list-style-type: none">• Gdynia• Słupsk• Tczew• Starogard Gdański• Wejherowo
Special Economic Zones	<ul style="list-style-type: none">• Pomeranian Special Economic Zone• Słupsk Special Economic Zone
Industrial Parks and Technology	<ul style="list-style-type: none">• Gdańsk Science and Technology Park• Pomeranian Science and Technology Park• Starogard Industrial Park• Kwidzyn Science and Technology Park
Investor Assistance Center	Pomerania Development Agency ul. Arkońska 6, 80-387 Gdańsk www.arp.gda.pl
The Office of the Marshal	ul. Okopowa 21/27, 80-810 Gdańsk www.urzad.pomorskie.eu
Voivodeship Office	ul. Okopowa 21/27, 80-810 Gdańsk www.uw.gda.pl
International Airport	Gdańsk

Presentation of the Region

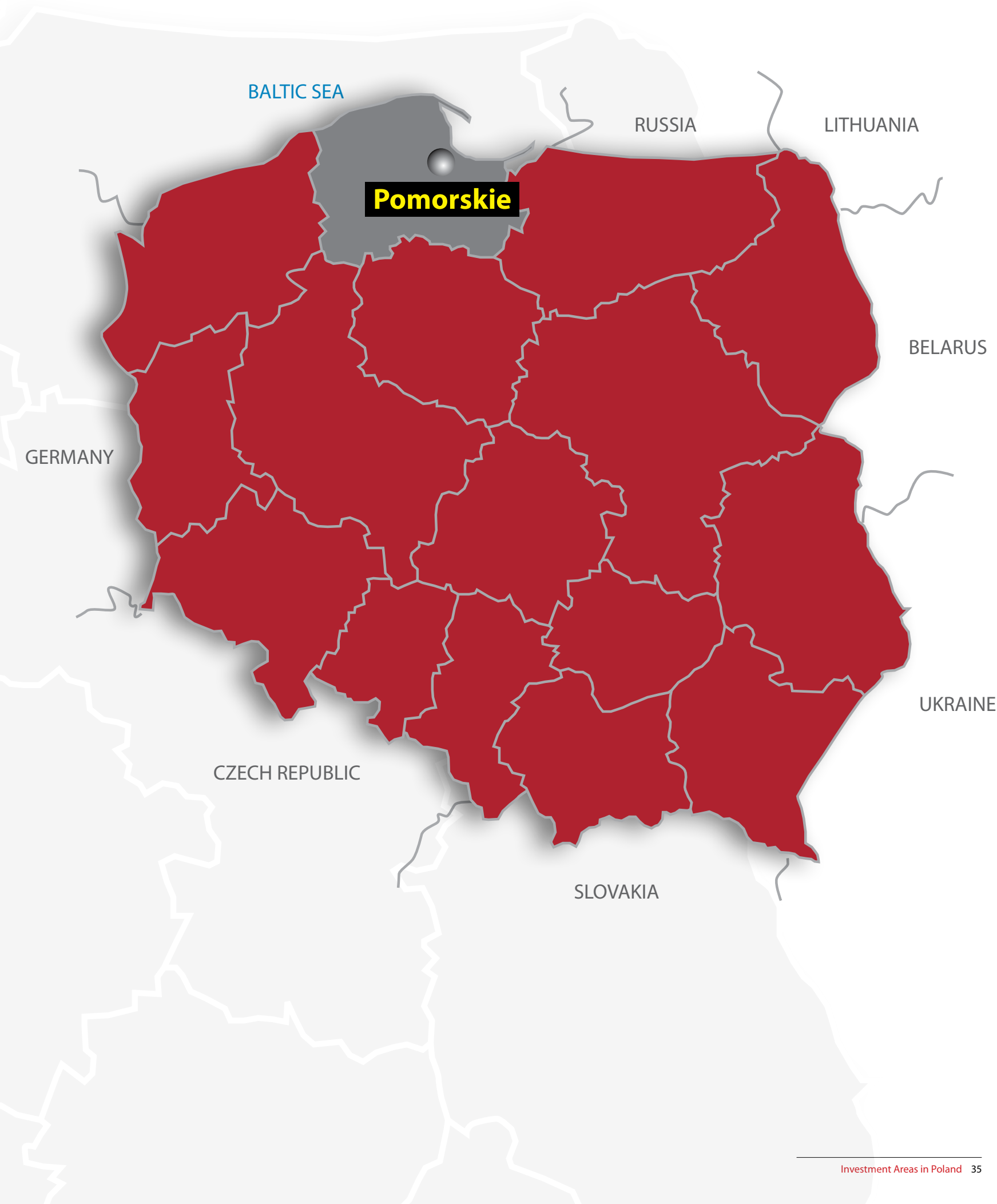
Pomerania is one of the most dynamically developing regions in Central and Eastern Europe. A range of actions taken for the last years makes the region become a more advanced and attractive place each day.

Advantages of the voivodeship

- a perfect, seaside location at the crossroads of main European transport corridors,
- the highest number of flights to Scandinavia,
- well developed industrial and port facilities,
- great export opportunities,
- the best natural conditions for both onshore and offshore;
- investments into infrastructure, science and business,
- young, ambitious and perfectly educated persone,
- more than 100 thousand students and 23 thousand graduates; the biggest number of prospective employees that speak Scandinavian languages,
- modern office area,
- the best place to live in Poland (proved in numerous rankings),
- attractive incentives.

High opportunity sectors

- BPO/SSC
- Power Engineering
- ICT
- Logistics
- Light chemical industry
- Automotive industry



BALTIC SEA

RUSSIA

LITHUANIA

Pomorskie

BELARUS

GERMANY

UKRAINE

CZECH REPUBLIC

SLOVAKIA

Pomeranian Special Economic Zone

Supporting good brand of Polish economy

Pomeranian Special Economic Zone offers exceptional investment opportunities in the Northern Poland. The Zone territory includes twenty two subzones located in the Pomeranian, West Pomeranian, Kuyavian-Pomeranian and Greater Poland Regions with the total area of 1,380 ha where business can operate on preferential conditions.

Why you should invest in the Pomeranian Special Economic Zone:

- Public aid in form of income tax exemptions up to the level of 40-70% of investment costs;
- Convenient location in the northern part of Poland with good access to the sea ports, international airports, main road and rail transport routes of the country and Europe;
- Industrial areas prepared to set up a business - full technical infrastructure, land development plans, real estate tax exemptions in selected locations, etc.;
- Comprehensive services for each investment project, post-investment services, extensive experience, clear procedures, extensive cooperation with central and local government, friendly business-related environment, etc.;
- Implementation of a number of projects supplementing and extending the zone activity, such as Gdansk Science and Technology Park, Baltic Port of New Technologies in Gdynia, biotechnology, ICT, power engineering (Forum for Dialogue and Cooperation "Energy and self-governance", Pomeranian Energy Technology Platform, Ecoenergy Cluster), EU projects, etc.;
- Qualified human resources - in addition to university graduates, employees with industry experience;
- Strong emphasis on the science-business cooperation - commercialization of science, BioConvention, InnoDoktorant, etc.

Welcome to our Subzone in Pila!

Pila – city in the Central Europe, located on important national road and railway transport corridors; a city with excellent technical infrastructure, great investment

areas including subzone of the Pomeranian Special Economic Zone, offering income tax exemption up to the level of 60% of investment expenditures.

Pila, „the green city“, is the fourth biggest city in Greater Poland, with the population of 75,000. Together with the surrounding settlements total population of the area is 250,000. Pila is a city of the young: over half of its inhabitants are younger than 40.

With over 4,500 students Pila is the academic centre of northern part of the Greater Poland region, providing the Pila market with highly qualified professionals.

According to the Newsweek Magazine rating carried out in the first quarter of 2011, Pila is the most business-friendly city in north western Poland among mayoral cities with a population of more than 50,000.

Investment offer

- Total area: 21.9 ha
- The technical infrastructure includes water supply system, sanitary sewage system and gas supply system. Up to 5 MW of electric power is provided from a transformer station. The land is located next to the railway siding.
- Awarded by the Polish Information and Foreign Investment Agency the title of "The Medal Ground 2010"

For more information please contact

Pomeranian Special Economic Zone Ltd in Sopot
Investment Development Department

tel.: +48 58 555 97 15
invest@strefa.gda.pl



Information about the Offerer

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e-mail: invest@strefa.gda.pl
www.strefa.gda.pl

The data in figures

Total subzones area	1,380.6253 ha
No. of subzones	22
Level of development	76%
Number of companies	86
Capital invested	USD 2.28 billion
Workplaces	15,556

Operates in four regions

- Pomeranian
- Kuyavian-Pomeranian
- Westpomeranian
- Greater Poland

Main industries

- High tech electronics assembly
- Automotive
- Machinery
- Construction components
- Biopharmaceutical

Major investors

Bridgestone, Cargotec, Flextronics International, International Paper, Jabil, Mondi, Weyerhaeuser

German companies

Etex Building Materials, Cartondruck, MTU, Schumacher Packaging

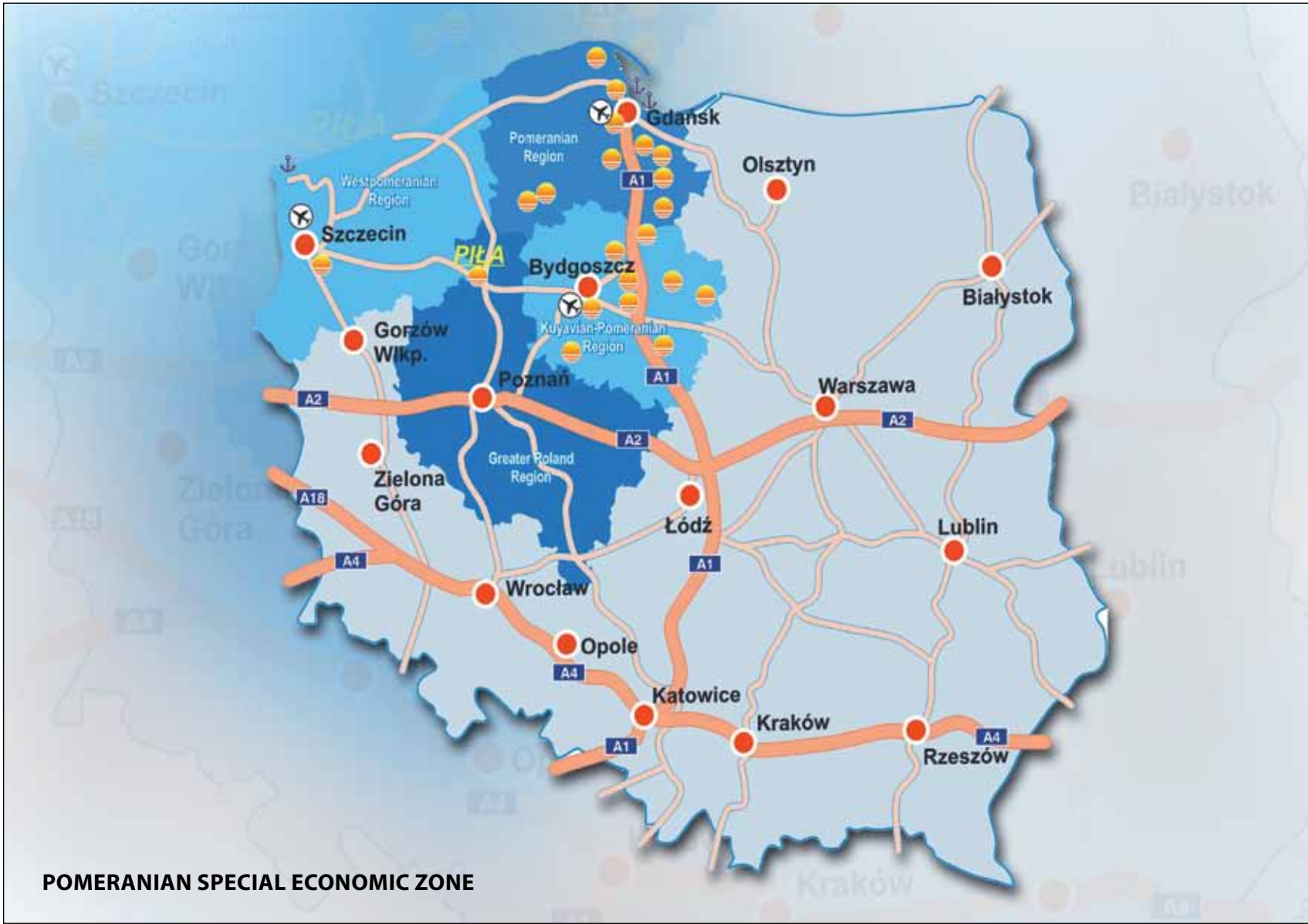
Contact the dedicated support of the investor

Beata Dudzinska
Deputy Mayor of Pila
e-mail: bdudzinska@um.pila.pl

Joanna Banach
Chairman of the Management Board of Inwest - Park Ltd in Pila
e-mail: joanna.banach@inwestpark.pila.pl

SUBZONE LOCATION







Tereny Inwestycyjne Info
Investment areas for business

www.terenyinwestycyjne.info

Leading industry website dedicated to areas of investment in Poland

- Daily news and current events
- Interviews and expert advices
- Searcher of investment areas
- Opportunity to present economic potential of cities and municipalities
- **16 000 unique users per month**

... business

begins here

Daily news and current events from **Investment Areas Info**



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Investment Areas in Poland

Munich 2013