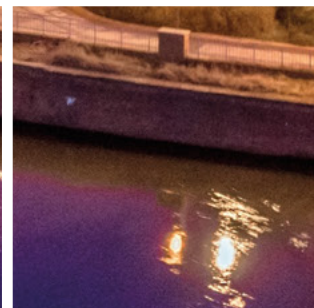
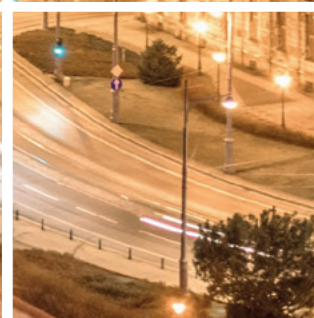
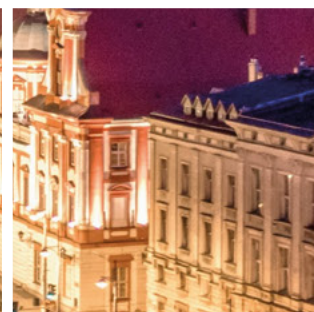
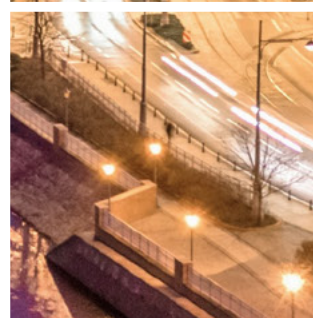
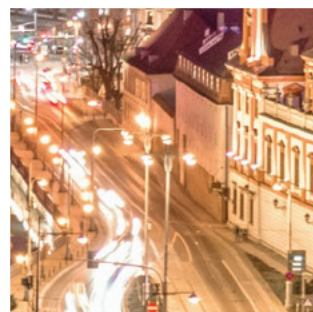
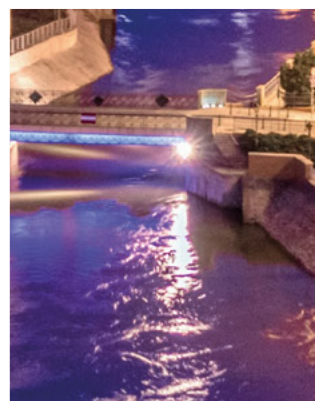
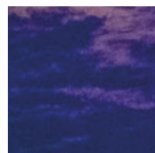
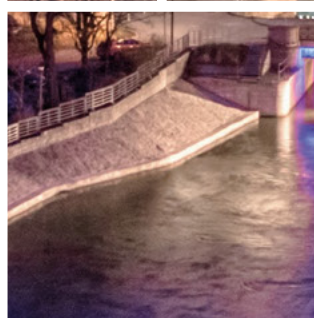
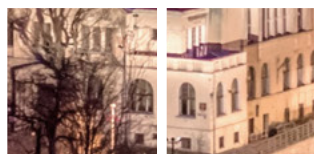


Wrocław *the meeting place*

DRIVEN BY

KNOWLEDGE PEOPLE & INNOVATION

2024



Wrocław Agglomeration
Development Agency



Invest in
Wrocław



Startup
Wrocław

/ Why Wroclaw



Perfect location and connectivity

Located in the heart of Europe and accessible by car in less than 4 hours from Warsaw, Berlin or Prague, Wroclaw is a perfect investment location. A constantly developing railway network supports both passenger traffic and freight transport, while direct flights to nearly 60 destinations make it even easier to travel round the world.



Business friendly

The supportive attitude of the city is very much appreciated by both local business and foreign direct investments (FDI). Moreover, the activities of Wroclaw Agglomeration Development Agency – the first such institution in Poland providing extensive support during the investment process, as well as offering a vast range of aftercare activities – are recognised and noticed by other cities.



Unique talent pool

The metropolitan area of Wroclaw, inhabited by around 1,500,000 people, is a great source of educated specialists whose knowledge and skills, together with their great command of foreign languages, are highly appreciated by companies from all sectors. It is contributed by 30 universities, which each year educate more than 105,000 students on varied faculties which bring over 27,300 graduates to the local labor market each year. Unique on the national scale is the presence of the Coventry University Wroclaw Branch.

Cooperative Ecosystem



Diversified economy

Thirst for knowledge and rapid growth drive Wroclaw creativity. Modern business services, industrial, IT, logistic sectors are just a few industries represented in the region by large international brands, as well as locally established more than 250 startups. Great support offered by many incubators and coworking spaces, together with vast networking events at hand, foster the creation of yet more micro businesses.



High quality of life

Wroclaw offers a high quality of life thanks to a lot of factors. The city is full of green areas, such as Szczytnicki Park, Japanese Garden which provide residents with places for relaxation and active recreation. Wroclaw - the meeting place, is a multicultural and tolerant city. This cultural diversity contributes to the openness and richness of the city's social life. Wroclaw is also characterized by a dynamic job market and a friendly atmosphere, making it an ideal place to live, study and work.



Leisure culture

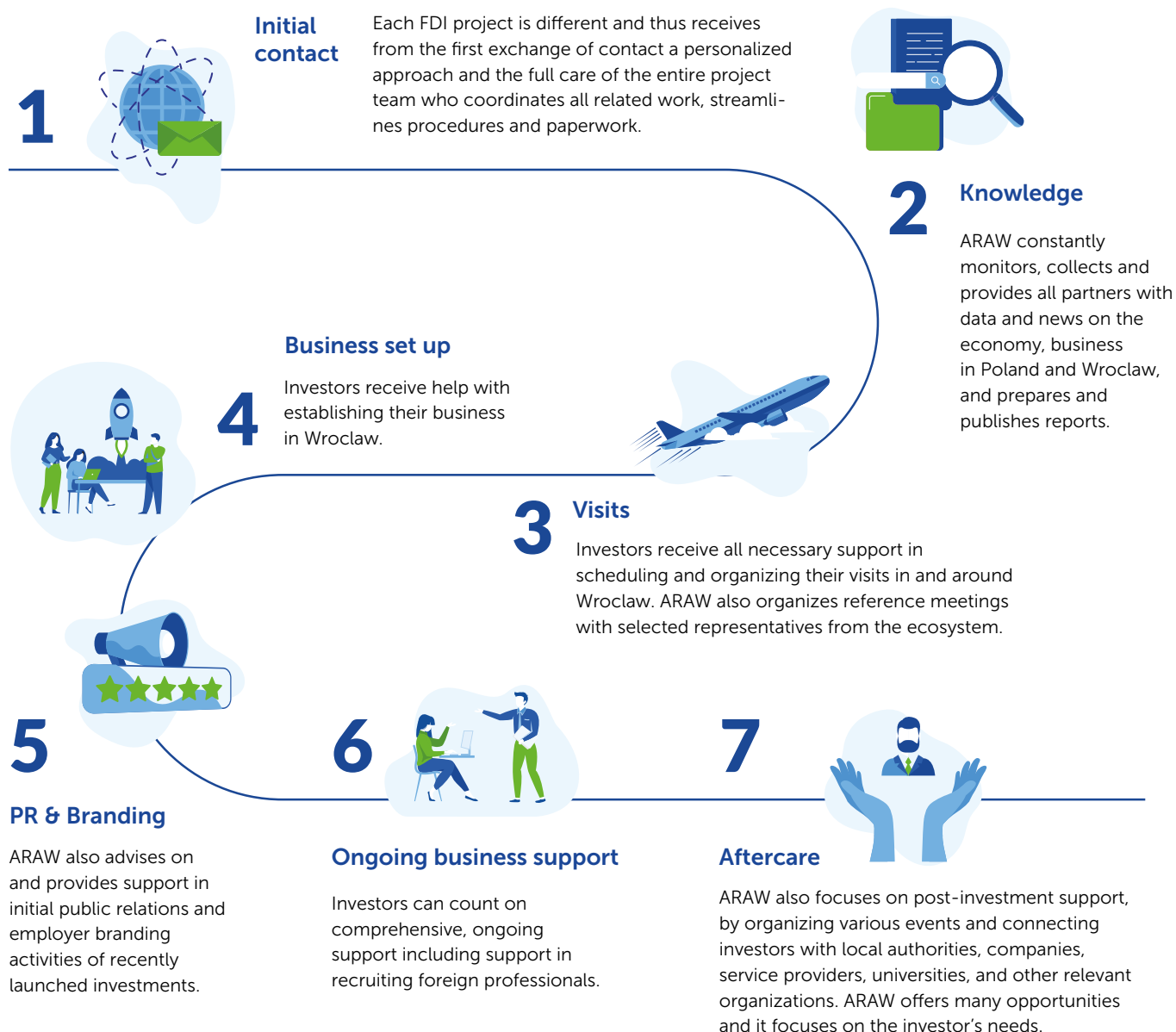
In Wroclaw you can take care of your free time with numerous attractions. There are theaters, cinemas, museums and art galleries that offer a rich cultural program. Worth visiting is the National Forum of Music, the Wroclaw Zoo, or strolling through the scenic Ostrów Tumski. The Market Square with its beautiful architecture. Wroclaw also offers an extensive network of bicycle and roller paths. In addition, the city organizes many festivals and outdoor events.

A photograph of a modern office lobby with large glass windows. In the foreground, a man in a dark suit and a woman in a dark blazer and skirt are walking away from the camera. The man is carrying a large black briefcase. In the background, an older man in a light-colored suit and a woman in a light blue suit are standing and talking. The floor is highly reflective, showing the silhouettes of the people.

Wroclaw - soft landing guaranteed

We provide top quality support for foreign and Polish businesses not only during the investment process but also long after the entity has established its activity in the region. Our knowledge, experience, and network are at your service.

Our one-stop shop approach



Wrocław Agglomeration Development Agency

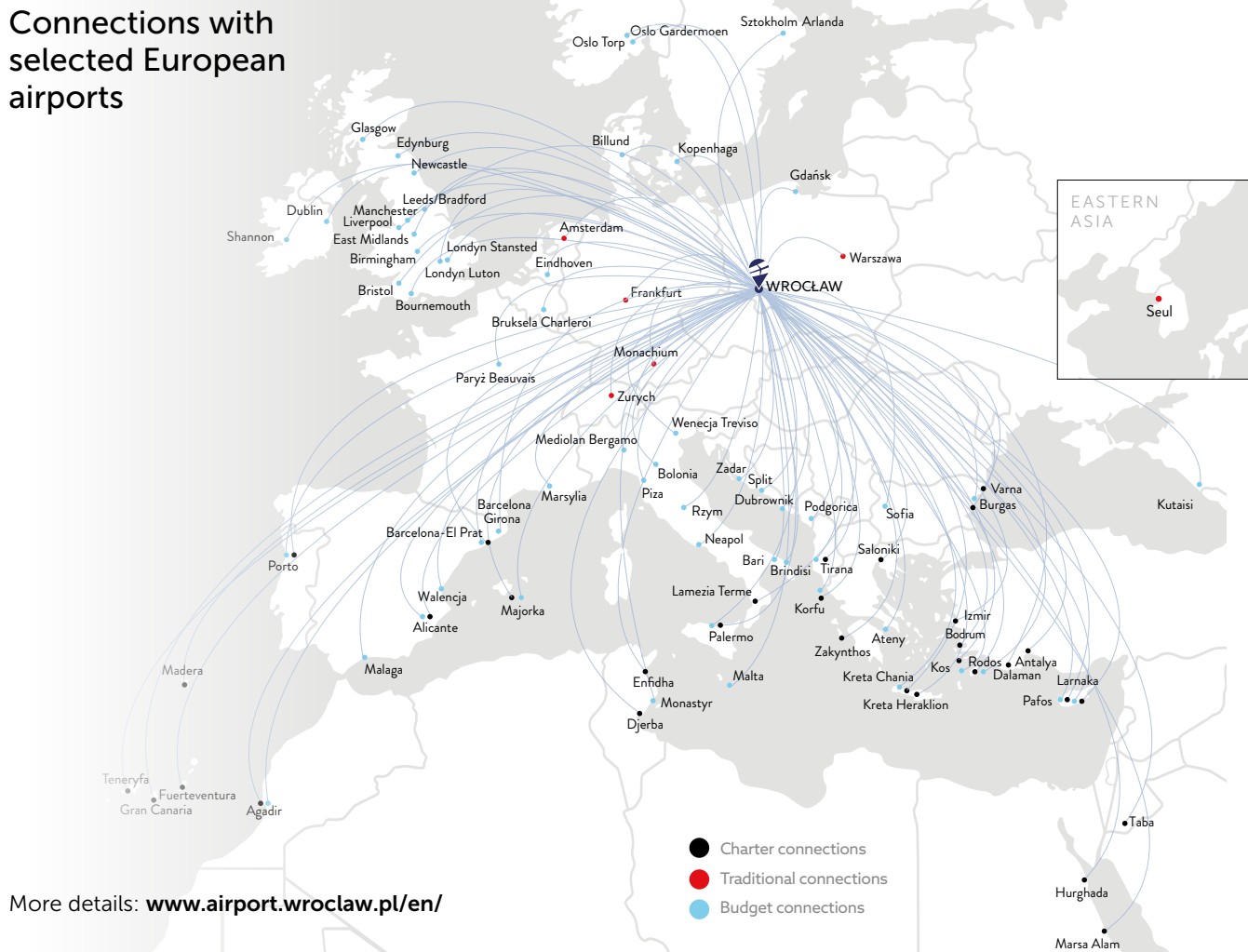
- Comprehensive support for investors**
 Created at the turn of 2005 and 2006 to provide one-stop shop support for investors in the Wrocław Agglomeration during the investment process.
- Partner of the national agency**
 Local partner of the Polish Investment and Trade Agency (PAIH), which supports both the foreign expansion of Polish business and the inflow of the foreign direct investments (FDI) to Poland.
- Varied aftercare offer**
 Extensive range of post-investment activities that involve networking and ecosystem building to encourage technologically advanced projects – R&D, ICT, KPO, Industry 4.0, electromobility.
- Experienced and successful**
 Until today, ARAW has successfully served over 260 FDIs, resulting in the creation of over 125,000 new jobs.
- Pioneering project in Poland**
 First such institution in Poland, resulting from a cooperation between Wrocław and 32 surrounding communes to foster business growth in the region.
- Awarded by international experts**
 Recognised by international expert institutions and organisations, like fDi Magazine (Financial Times Group), Emerging Europe, Forbes and many others.



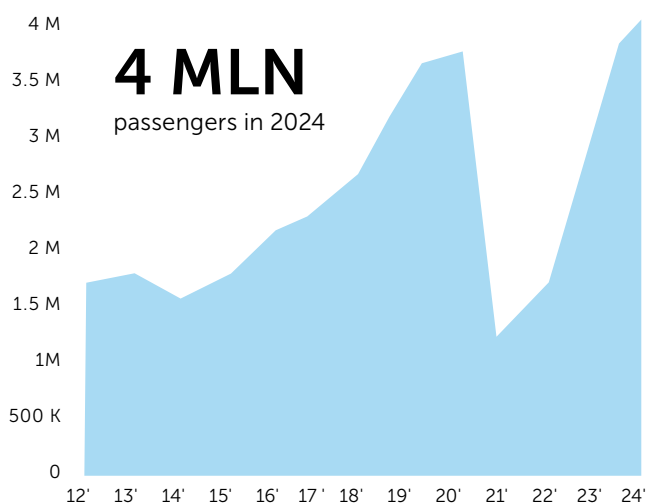
Location & Connectivity

Wroclaw is strategically located between Prague, Warsaw and Berlin, with each city less than a 4-hour drive away. The city boasts an excellent infrastructure, including modern highways, a growing airport, and an expanded rail network, ensuring it is well connected to the rest of the world. Within Wroclaw, numerous bus and tram lines, the city bike system, and car or electric scooter sharing systems make transportation easy and promote eco-friendly commuting for residents.

Connections with selected European airports



Passenger traffic at the Wrocław Airport



Growth

- 175 mln PLN granted in 2022 from EU funds for the airport development,
- further extension of the Wrocław Aircraft, Maintenance Services (WAMS) of Ryanair,
- construction of the new fuel depot,
- construction of the 3-star hotel.



Safety

ILS CAT II landing support system. Best parameters among regional airports.



Convenience

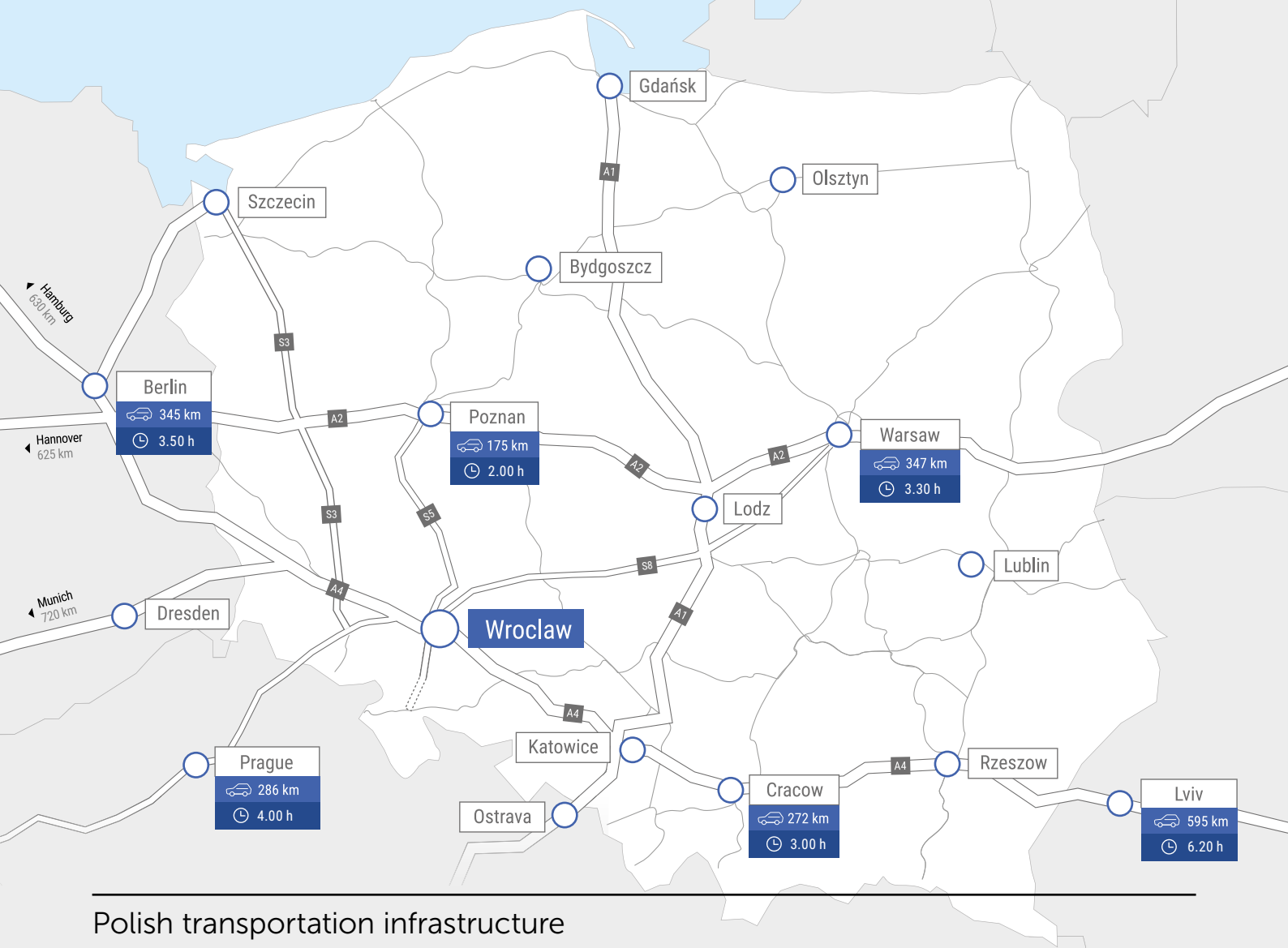
Only 10 km away from the city centre, parking spaces for 5,000 cars, Kiss&Fly zone, taxi, bus.

The best regional airport in Poland

The Wrocław Nicolaus Copernicus Airport provides its services to network carriers such as Lufthansa, Swiss, KLM, Finnair, PLL LOT, low-cost carriers Ryanair, Wizz Air and Norwegian and also charter airlines hired by tour operators. With so many various operators, the airport offers a wide range of direct flights to major hubs across Europe and beyond (Amsterdam, Munich, Frankfurt, Helsinki, Seoul, Copenhagen, Zurich and Warsaw) and flights to the largest capital cities of Europe such as Oslo, Stockholm, Rome, Paris, Athens, London etc. Due to the modern and functional terminal, alongside the comfortable network of connections, Wrocław Airport is willingly chosen both by outbound travelers and visitors.

Driving time & distance to selected ports:

- Bremerhaven – 7 h, 760 km
- Gdańsk – 5 h, 550 km
- Hamburg – 6.5 h, 630 km
- Rotterdam – 9.5 h, 1,000 km



Polish transportation infrastructure

Poland has made significant improvements to its infrastructure network over the past decade. Between 2003 and 2022, the country built motorways and expressways totaling 4,887 km. By 2025, the total length of motorways and expressways will reach 8,177 km. The Government's National Road Program for the period up to 2030 provides for road investments along national roads, expressways and highways with a total length of more than 6,100 km. New investments will include tasks with a length of about 2.6 thousand kilometers, while continuing tasks started under the existing road program have a length of more than 3.5 thousand kilometers.

The total amount allocated for the implementation of all works included in the program is 58.3 billion PLN. Wrocław is the first Polish city to complete a planned network of motorways and expressways. This has significantly reduced driving times to other major cities in the Central and Eastern European (CEE) region, such as Warsaw (3.5 hours via the S8 road), Szczecin (4.5 hours via the S3 road), Dresden (2.5 hours via the A4), Krakow (3 hours via the A4), and Poznań (2 hours via the S5). The completion of the motorway ring in 2011 has also alleviated transit-related traffic in Wrocław's city center.

4,887 km

motorways and express roads built in Poland 2003-2022

8,177 km

planned motorways and express road length by 2025

PLN 80 billion

planned rail infrastructure investment in Poland by 2027

730 km

share of Polish roads in the Via Carpatia trail



Strong economy

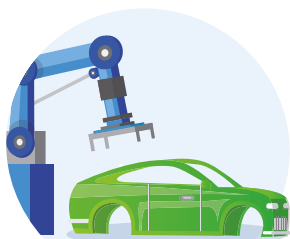
The economy of Wrocław is based on knowledge of enterprises, which are focusing on providing professional, scientific and technical services. Significant intensification of activities can also be observed in industries such as automotive, mechanical engineering, pharmacy, modern business services, IT & ICT. Diversification and resilient development of Wrocław makes it a really attractive labor market with many possibilities and opportunities for inhabitants.

Strong and Diversified Economy

Wrocław is one of the largest and most developed cities in Poland. In the past few years, it has experienced tremendous progress in both economic and socio-cultural areas. What is also important is that Wrocław belongs to the top cities when it comes to creating new jobs and increasing the quality of living of the citizens. The whole Lower Silesia region, which Wrocław is the capital of, is also known as the most urbanised region in Poland. Factors that have significantly impacted the development

of the Wrocław Agglomeration are, among others, its great location – in the heart of Europe, well-developed infrastructure increasing the connectivity aspect but also highly educated human capital which have attracted famous international brands of all sectors to the city. The city is strongly emphasizing cooperation with business and universities in the so-called „golden triangle”. Wrocław welcomes modern and innovative projects that will further boost its development.

Diversified labour market



Automotive

Autoliv, BASF, Daimler, PGW,
Toyota, ZF



White goods

BSH, Electrolux, LG



Chemical & Pharma

3M, Align Technology, Fresenius,
Hasco-Lek, Herbapol, MacoPharma,
USP Zdrowie



Mechanical Engineering

Balluff, Danfoss Power Solutions,
Fanuc



Modern business services

BNY Mellon, Google, HP, McKinsey,
Olympus, UBS, Smith+Nephew, Qiagen



Electromobility

Daimler, LG Energy Solution



IT & ICT (BSS)

Atos, Capgemini, Dolby, GlobalLogic
(Hitachi), IBM (Kyndryl), Nokia, Opera
Software, Tieto, Unit4, Volvo IT

/ Modern Business Services

Wroclaw is one of the leading destinations for business services, IT sourcing and software development in Poland and Central Europe. The city's appeal is driven by a large pool of talented professionals and graduates, high-quality education, strong foreign language skills, and an abundance of modern office space. Wroclaw also boasts a vibrant startup ecosystem, with numerous innovative technology companies and entrepreneurs thriving in the region. The presence of many research and development centers, as well as robust IT and financial sectors, further distinguish Wroclaw as a top location for both established companies and emerging startups.

GBS: HR, F&A, Admin

3M / US
Amrest / PL
Aptean / US
AXA XL / US
Becton Dickinson / US
BNY Mellon / US
Boehringer Ingelheim / DE
Deichmann / DE
Delaval / SE
EY GDS / GB
Facor Law / US
Fortum / FI
Fresenius Kabi / DE
Fresenius Medical Care/ DE
Getsix Holding / DE
Google / US
Grid Dynamics/ US
HPE / US
HP Inc. / US
Industrial Bank of Korea/ SG
Kaufland / DE
Mahle / DE
Merck / DE
Olympus / JP
Qiagen / DE
Parker Hannifin / US
Pattonair / US
PPG / US
Santander Global Operations / ES
Schaeffler / DE
Smith+Nephew / GB
SSAB / SE
Toyota / JP
UBS / CH
UPS / US
Volvo / SE
ZF / DE

KPO

Allianz / DE
Aryzta / CH
Crisil Irevna / IN
EY GDS / GB
McKinsey / US

BPO

Contract Administration / GB/PL
DXC Technology / US
CSS Corp / US
DXC / US
Gates / US
Impel Business Solutions / PL
Xylem / US

Contact centre/ Debt Collection

CCIG / PL
Intrum / SE
KRD / PL
Kruk SA / PL
Pyszne.pl / PL
Qatar Airways / QA
Santander Consumer Bank / ES
Ultimo / PL

R&D IT

BASF / DE

66,200

 employees in the modern services sector in Wroclaw

234

companies in the modern services sector

CD Projekt Red / PL
Controlant / IS
DataWalk / PL
Diehl Controls / DE
dmTech / DE
Dolby / US
Etteplan / FI
Gigaset / DE
GlobalLogic / US
IAV / DE
Kostal Group / DE
LiveChat / PL
Neurosoft / PL
Nokia / FI
Opera Software ASA / NO
Red Embedded Group / GB
Ryanair Travel Labs / IE
S3 / IE
Techland / CN
UNIT4 / NL
Viessmann / DE

IT services

Accenture / US
AirSlate / US
Alfa-Net / PL
Altimi Solutions / PL
Aptitude Software / GB
Atos / FR
Avande / US
Avenga IT Professionals / PL
AxiomSL / US
Birlasoft / IN
Cappgemini / FR
Channels / PL
Ciklum / DK
Clearcode / PL
Cloudflight / PL
Codelab / PL
Code Poets / PL
Cogniance / US
Coherent Solutions / BL
Comarch / PL
Concentrix / NL/IE
DataArt / US
Duco / US
Edge One Solutions / PL
Endava / GB
Epam Systems / US/BY
Epiq Systems / US
FrameLogic / PL
Gorilla Group / US

30+

languages spoken in Wroclaw service centres

HCL / IN
Helbling Technik / CH
Hicron / PL
Infor / US
Infosys / IN
InsERT / PL
Intive / PL
Jabil / US
KBJ / PL
Kyndryl (IBM) / US
LeverX / PL
Luxoft / CH
Movate / IN
Mphasis / US/IN
Natwest/ GB
NBC / PL
NeuroSYS / PL
Ocado / GB
OpsTalent / GB
QAD / US
Quality Task Force / CH
RST / PL
Ryanair Travel Labs / IE
Sente / PL
SI Consulting / PL
Sii / FR
S3 Group / IE
Softserve / UA
Spyrosoft / PL
Sygnity / PL
Talex / PL
Thaumatec / PL
Tieto / FI
Tooploox / PL
Transition Technologies / PL
Unic / CH
Univio / PL
VM.PL / PL
Volvo IT / SE
Xebia / PL

Selected Wroclaw Startups

alokai
alphamoon
Biocam
Bioceltix
Biotts
Brand24
BuzzyBike
byteLAKE
BZB UAS
CancerCenter

1.38 M

sqm of modern office stock (Q2 2024)

ChallengeRocket
clone
cux.io
DataWalk
Droids on Roids
Explain Everything
Four Point
Fridee
Giant Lazer
Glucoactive
Green Sequest
Hustro
Identt
Infermedica
INKsearch
Kadromierz
Labplus
Laparo
LiveKid
Nanores
Meeting Application
Monterail
Nanores
Nestmedic
Open Loyalty
OwlSentry
PayEye
Piwik PRO
PixelAnt
poley.me
QNA Technology
SatRevolution
Saula Technologies
Scanway
Sherlock Waste
Smabblar
Smart Lunch
Surfer
Surveily
Syntoil
Techland
Ten Square Games
TestArmy
TimeCamp
Tooploox
Trasee
useme
Woodpecker
Zeccer
Zmorph
zrzutka.pl

/ Manufacturing sector

Lower Silesia, with Wrocław as its capital, is one of Poland's leading manufacturing hubs. The region benefits from significant foreign investment, a highly skilled workforce, and the bold integration of cutting-edge technologies, including Industry 4.0 solutions. These factors contribute to some of the highest productivity levels in the country. The sector's strength is driven by leading global industries, including automotive, white goods, machinery, aerospace, pharmaceuticals and chemicals. In addition, the electromobility industry is growing rapidly, with companies producing components and electric vehicles, such as scooters and motorcycles, flourishing in the region.

305,300

 employees in the manufacturing and construction sector in the region

4.2-5.4

headline rent € / sqm / month (Q2 2024)

4.46 M

sqm of modern warehouse/ manufacturing space (Q2 2024)

568,200

of industrial and logistic space under construction

Automotive

AKS Precision Ball / JP
Autoliv / SE
BASF / DE
Brose Sitech / DE
Carcoustics / DE
Chassis Brakes / US
Daimler / DE
Eto Magnetic / DE
Faurecia / FR
Garmin / US
Gates / US
Gestamp / ES
GKN / GB
Govecs / DE
GTHR / CN
Industrias Alegre / ES
Lear / US
Leoni / DE
LG Energy Solution / KR
Mercedes-Benz / DE
NSK / JP
Pittsburgh Glass Works / US
Ronald / DE
Sanden / JP
Simoldes Plasticos / PT
Sitech / DE
Teknoware / FI
Toyota / JP
Vibracoustic / DE
Volkswagen / DE
ZF / US

Aerospace

Becker Avionics / US
Collins Aerospace / US
Radiotechnika Marketing / PL
Ryanair / IE
Unison GE / US
XEOS / US/DE

Electronics / White goods

Aira / SE
Asplex / TW
Bafang Electric / CN
Beko / TR
Bosch / DE
BSH / DE
DCS / KR
Electrolux / SE
Elica / IT
Hemmersbach / DE
Ilpea / IT
Italmetal / IT
Komsa / DE
Lapp Kabel / DE
LG Electronics / KR
LG Innotek / KR
MSI / TW
Posco / KR
TelForceOne / PL
Unis Group / NL
USI Poland / TW
Vestel / TR
Wago Elwag / DE

Mechanical Engineering

Alstom / FR
Aluwind / DK
Boart Longyear / US
Danfoss / DK
DeLaval / SE
GE Vernova / US
HACO / BE
KGHM Zanam / PL
Parker Hannifin / US
Rawlplug / PL
Siemens / DE
Toya / PL
Vorwerk / DE
Viessmann / DE
Wrocław Aircraft Maintenance

nance Services / IE

Food processing

Bama / US
Bulk Powders / US
Cargill / US
Lorenz Snack-World / DE
McCain / CA
Mondelez / US
Nestle Purina / US
Nordis / UA
PepsiCo / US
PPO Siechnice / PL
Sonko / PL
Tarczynski / PL
Wratislavia Biodiesel / PL

E-commerce / Logistics

AB SA / PL
Amazon / US
Crusar / PL
DHL / DE
DSV Group / CH
Kuehne + Nagel / CH
MBS Logistics / PL/DE
Pattonair / GB
Raben / NL
Schavemaker / NL
Shein / CN
Rohlig Suus / PL
THG / GB
Tim / PL
Trans.eu / PL
UPS / US

Chemical / Pharmaceutical

3M / US
BASF / DE
Colgate-Palmolive / US
Clarena / PL
Hasco-Lek / PL

Herbapol / PL
LG Energy Solution / KR
Linde Gaz / DE
MacoPharma / FR
Materialise / BE
Oleofarm / PL
Paragon Medical / US
PPG / US
Selena / PL
S-Lab / PL
USP Zdrowie / PL

R&D industrial

3M / US
Align Technology / US
Autoliv / SE
Brose Sitech / DE
Collins Aerospace / US
DeLaval / SE
Novasome / PL
LG Electronics / KR
KGHM Cuprum / PL
Mondelez International / US
PCC Rokita / DE
Sitech / DE
Robert Bosch / DE
Volvo / SE
XTPL / PL

/ Innovation Driven City

Vivid startup community

Wroclaw is a recognised technology hub and the first largest startup ecosystem in Poland. According to the Polish Startups report, as many as 20% of the country's startups operate in Wroclaw. While in the report "The next generation of tech ecosystems" prepared by Dealroom, Wroclaw was named a "Rising star of technology hubs" with the 1st place in Poland, 2nd in Europe and 8th in the world.

Wroclaw startup ecosystem is known for incredible cooperation among all players. The commitment of many players and entrepreneurship has created an environment in which the startups thrive. A strong technology infrastructure, a diverse talent pool, broad investment opportunities, universities that train specialists, the city's involvement, high quality of life and strategic location makes Wroclaw a great place for companies looking to launch. Additionally, using all the resources available in the market, startups can take advantage of this ever-growing community to succeed.

 **250+** startups
in Wroclaw

the biggest
startup ecosystem
in Poland



The most interesting startups from Wroclaw:

CUX.io – is an analytics tool that was created to show the broadest context of user behavior when using websites or applications on the Internet.

IDENTT – builds AI solutions to ensure that our identities are secure and inseparable, and that attempts to attack them fail.

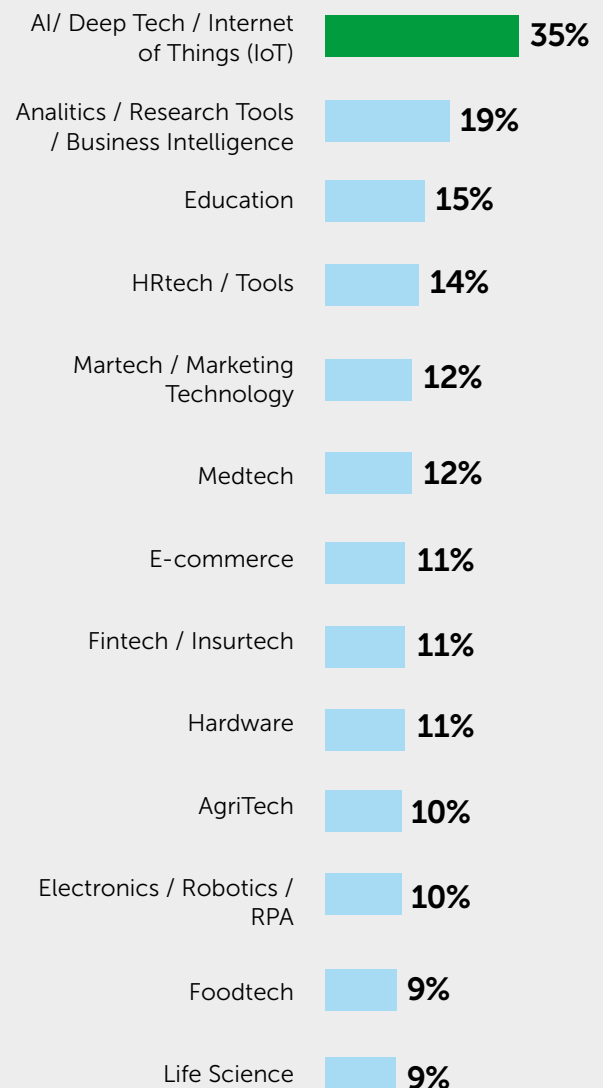
Infermedica – specializes in tools that use artificial intelligence to support doctors and medical professionals in diagnosing and caring for patients.

PayEye – was the first in the world to commercially release a complete payment system based on payment acceptance through user identification using a fusion of iris and facial biometrics.

SatRev – specializes in designing, manufacturing and operating real-time Earth observation satellites.

Surfer – is the #1 Content Intelligence tool that merges content strategy, creation, and optimization into one smooth process – to help content teams grow brands, organic traffic, and revenue.

The most common fields of activity among Wroclaw startups*



*Polish Startups 2023 report

Exquisite R&D facilities

The city's advanced and diverse infrastructure plays a crucial role in fostering the development of innovative services and facilitating the execution of research projects. Wrocław's research centers are equipped with high-tech laboratories and cutting-edge technology, operated by a team of international specialists who provide essential support. Serving as a collaborative platform, Wrocław's academic hub brings together the government, local academia, and the business community, thereby promoting the transfer of knowledge and the expansion of R&D activities. This integrated approach not only strengthens research capabilities but also drives innovation and economic growth in the region.



400+

R&D and IT centres

11%

of all R&D centers in Poland
are in the city of Wrocław

30+

incubators
and coworking spaces

Main research areas:

- ICT
- Chemistry & Materials
- Energy
- Transportation & Logistics
- Sustainability & Ecology

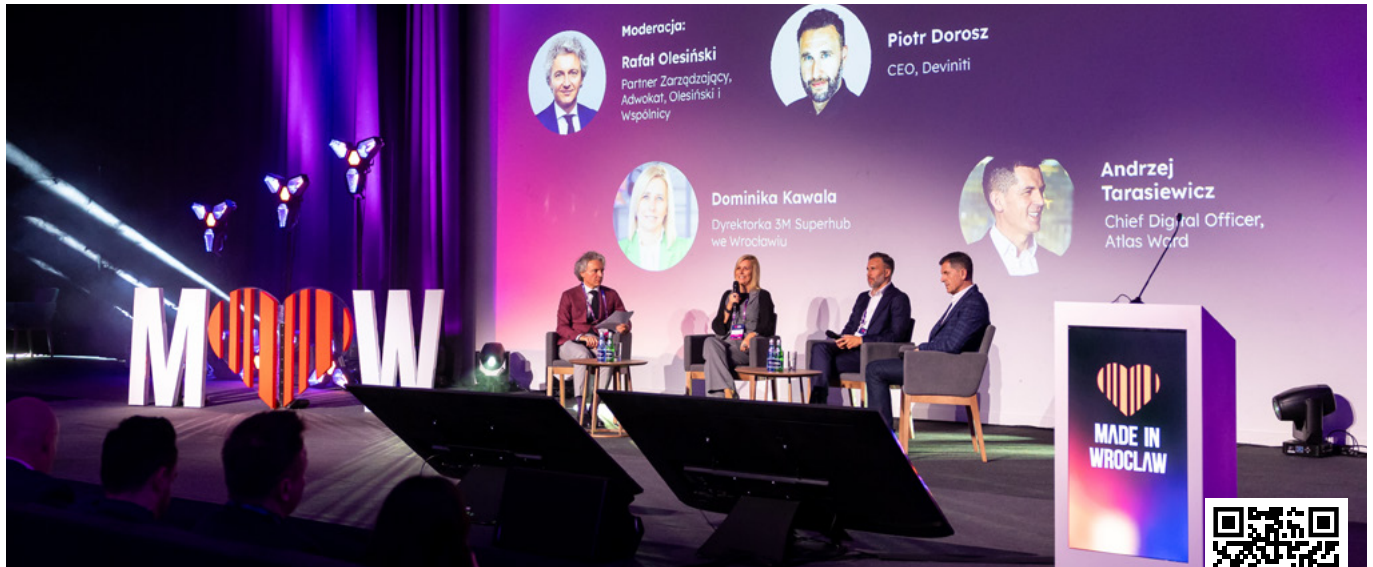
Selected research institutions/units

Codelab	codelab.eu/pl/kontakt/rd-site-wroclaw
HAK LLC Research and Development Centre	cbrhak.pl/
Institute of Energy Systems Automation in Wrocław	www.iase.wroc.pl/
KFB Acoustics	kfb-acoustics.com/
KGHM CUPRUM Research and Development Centre in Wrocław	kgghmcuprum.com/en/
Lower Silesian Innovation Center	www.dci.edu.pl
L. Hirszfeld Institute of Immunology and Experimental Therapy PAN	hirszfeld.pl/en/
Łukasiewicz Research Network - Electrotechnical Institute Division of Electrotechnology and Materials Science	www.iel.wroc.pl/?Language=EN
Łukasiewicz Research Network – PORT Polish Center for Technology Development	www.port.org.pl/en/
Machinefish Materials & Technologies	machinefish.pl/en/
Military Institute of Engineer Technology	www.witi.wroc.pl/pl/
Poltegor Institute	www.igo.wroc.pl/en/
Research and Development Centre Novasome LLC	novasome.pl/en/
Research and Development Centre, Provincial Specialized Hospital in Wrocław	wssk.wroc.pl/osrodek-badawczo-rozwojowy
University of Wrocław	uni.wroc.pl/en/
Viessman Climate Solutions	viessmann-kariera.pl/rd
W. Trzebiatowski Institute of Low Temperature and Structural Research PAN	www.intibs.pl/en/
Wrocław Centre of Technology Transfer	wctt.pwr.edu.pl/en/
Wrocław Medical University	www.en.umed.wroc.pl/
Wrocław Technology Park	www.technologypark.pl/en/
Wrocław University of Economics and Business	www.ue.wroc.pl/en/
Wrocław University of Environmental and Life Sciences	upwr.edu.pl/en/
Wrocław University of Science and Technology	pwr.edu.pl/en/
ZEC Diagpom	www.diagpom.pl/index.html
Zespół Elektrociepłowni Wrocławskich KOGENERACJA S.A.	www.kogeneracja.com.pl/en/

/ Many networking and knowledge opportunities

Made in Wrocław

Business, science, technology and innovation on one stage. Each year Made in Wrocław gathers inspiring visionaries, representatives of multinational corporations, local government, academia and ambitious local startups. It combines a conference, expo and a business gala with a startup competition.



www.made-in-wroclaw.pl

Startup WRO Meetups

A series of meetups that focus on practice and solid knowledge. For anyone interested in the local startup community - from founders and investors to students. Our goal is to collectively create a platform for interesting projects to find inspiration, partners and funding, and for graduates to discover their dream jobs.



meetup.startupwroclaw.pl

Evolutions: Meetup & Showcase

Evolutions: Meetup & Showcase is the biggest regional startup event that brings together SMEs, innovators, investors and professionals from technology and creative industry. Organized by Startup Wrocław and OVHcloud Startup Program, one of the most respected seed accelerators.



evolutions.startupwroclaw.pl



Wrocław Tech Business Angel Club

Wrocław Tech Business Angels Club is a community of top managers, investors and business angels from Lower Silesia, creating a platform dedicated to the exchange of knowledge, experience and cooperation in investing in technological, innovative startups. Members gain access to attractive projects, share knowledge and experience, develop competencies necessary in the dynamic world of startup investments and build strong professional business relationships.



wtbac.startupwroclaw.pl





Vibrant Academic Centre

Wroclaw is the third largest academic centre in Poland, attracting young people from all over the country, Europe and even further destinations. Each year, both public and private universities educate more than 100,000 talented individuals, who are very much appreciated by the local business. Students start their cooperation with companies during their 2nd and sometimes even 1st year of studies, whereas part time employment during 3rd or later years is almost a rule.

105,184

students in Wrocław

29,300	30	8,070	96%
graduates annually	universities & higher education institutions	foreign students in Wrocław	students speak English

Number of students of important majors in Wrocław

10,000	19,570	24,500	5,400	4,500
ITC & related	Engineering	F&A, Management, Administration	Language studies	Law

Biggest universities in Wrocław



Wrocław University
of Science and Technology

Wrocław University of Science and Technology

Top technical university in Poland actively collaborating with the industry. Founded in 1945, it educates over 27,000 students in 16 faculties, offering 50 study programs. It employs 2,000 academic teachers. Annually, about 5,000 graduates receive their diplomas.



Wrocław
UNIVERSITY
OF ECONOMICS
AND BUSINESS

Wrocław University of Economics and Business

There are over 9,000 students study in 26 majors at the University. 76% of the graduates find employment within the first 3 months after graduation. WUE is ranked among the top economic higher education institutions in Poland.



Uniwersytet
Wrocławski

University of Wrocław

The only university in south-western Poland with the Initiative of Excellence – Research University status, what provides additional funds for scholarships and research projects. A member of the Arqus European University Alliance – a network of 9 prestigious European universities. At present there are over 20,000 students studying at 12 faculties.

Over 100 student scientific clubs in Wrocław

PWR Racing Team

A group of 80 students independently designs and builds Formula Student class racing cars, which they race in international engineering competitions. Winners of Formula SAE Italy in 2017.

Koło Naukowe Pojazdów i Robotów Mobilnych PIRM

The goal is the development of automotive and electromobility by the creation of innovative vehicles, mainly motorcycles: LEM Photon and LEM Tachyon with great successes in international competitions. photovoltaic panels.

AIESEC

This international organization develops leadership qualities in young people. If you're thinking about a career in a global environment, AIESEC is a good place to start.

UWr Scientific Club LegalNet

The club develops students' interests and skills in the field of computer law, in particular in information protection and legal regulations concerning access to information.

KN Humanizacja Środowiska Miejskiego

The team creates sustainable, innovative, and inclusive architecture in our surrounding space. They design technical and social solutions dedicated to vulnerable groups and the local urban community.

Student Forum Business Centre Club (SF BCC)

It supports the development of entrepreneurship in Poland. This is the place where future careers are created.

UWr Scientific Club of Chemists "Jeż"

The club supports and conducts scientific and research work as well as disseminates knowledge in the field of chemistry and other natural sciences.

UWr Scientific Club of Computer Science, Mechanics and Electronics Enthusiasts Continuum

Constructors of one of the best rovers in the world Aleph 1. Passionate students who want to develop knowledge and skills in electronics, robotics and embedded systems.

Polish Students' Union WUEB

ZSP organizes substantive, charitable and entertaining projects, combining passion with great fun.



Wroclaw – the right place!

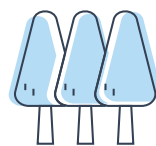
A unique city in the heart of Europe that combines modernity with tradition. As a rapidly developing business, educational and cultural center, Wrocław offers extraordinary opportunities creating a special place to live, work and develop. The city is vibrant with numerous festivals, concerts and artistic events that attract both locals and tourists from all over the world. Wrocław is also outstanding for its unique architecture and atmosphere, while numerous parks, green recreational areas and an extensive network of bicycle paths encourage active recreation. All this makes Wrocław an perfect place not only to work, but, above all, to develop and live.

Green city

Wroclaw is among 100 European cities selected for an innovative EU programme - the Climate Neutral and Smart Cities Mission.

Wroclaw's aim is to become a city that is sustainable, resilient, responsible and ready for the challenges of the future, which protects and develops its natural capital and ensures the safety and sustainable socio-economic development of its inhabitants.

Greenery close to the residents, in their everyday surroundings, on their way to work, school, around the block, access to parks or squares within 300 m of their homes, and the unsealing of concrete spaces - this is one of the city's priorities for the coming years.



There are
60 parks
in Wroclaw -
covering an area of
approx. 660.96 ha.



Over
27,500 new trees
and 305,000 plants
of bush and climbers have been
planted in the last five years.



Green spaces in Wroclaw
account for about
41% of the city's area.

Culture

Wroclaw is one of the most important cultural centers in Poland and one of the most significant in this part of Europe which was proved by the city's recognition as the European Capital of Culture in 2016.

Experiencing culture in Wroclaw includes:

- A dozen unique museums - including the City Museum, the National Museum, the Museum of Contemporary Art, the Natural History Museum, and Hydropolis - a center for water knowledge.
- The National Forum of Music - one of the largest concert venues in Europe.
- Award-winning theaters: the Polish Theater, the Contemporary Theater, the Capitol Music Theater, the Pantomime Theater, the Opera House and various avant-garde theaters.
- Recognized international festivals: the WRO International Media Art Biennale, the New Horizons International Film Festival, the Jazz nad Odrą music festival, Jazztopad Festival, Review of Young Art in Extreme Conditions SURVIVAL and others.
- Guitar World Record - an annual event for more than 20 years, bringing together thousands of guitar lovers in the heart of the city, its market square, during which everyone plays one hit together to break the world record, while afterwards you can immerse yourself in the guitar world during the performances of various bands and the audience accompanying them.



There are more than a dozen municipal institutions in Wroclaw municipal cultural institutions, located in different parts of participation in cultural events, workshops and courses.

Wroclaw culture, both organized and grassroots, takes place in various city venues, cafes, hotspots, but also squares such as the summer themed dances on the square at the National Music Forum. Culture is a constantly present in the life of the agglomeration.

Tolerant city

Wroclaw is a city with an international community that offers numerous networking opportunities. Its cultural diversity stems from its role as an multinational academic center and its deep history. As a result, everyone, regardless of origin, can feel at home here.

Wroclaw promotes tolerance and openness, being the first Polish city to join the European Coalition Against Racism. A Declaration on Tolerance and Respect for Human Rights was adopted here in 2021, and the city's mayor has a dedicated advisor for tolerance and countering xenophobia.

The city is also distinguished by the presence of religious centers of different religions. Wroclaw has always been perceived as an open and tolerant city. A social and architectural expression of the city's openness is the Four Denominations District, which is part of the Old Town. There are four places of worship of different faiths in close proximity.



30 international schools and kindergartens

60,000 foreign students and staff

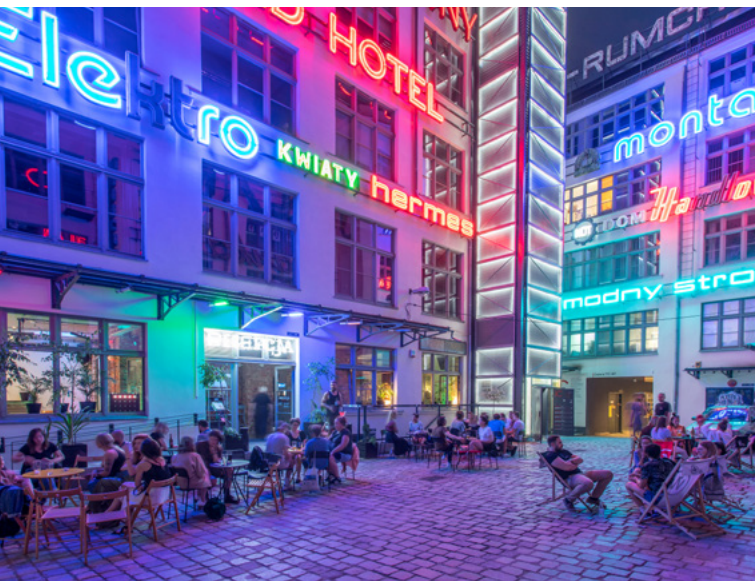


more than 120 nationalities

1 in 5 residents is a foreigner



26 consulates



After hours

Sports and entertainment facilities - the opportunity to spend time actively

Wroclaw offers a wealth of sports facilities for both amateurs and professionals, as well as a varied entertainment scene. The city is equipped with a variety of sports facilities which allow the practice of many sports all year round. It is also a great place to cheer on the best teams participating in international competitions. Wroclaw has several sports stadiums, offers numerous swimming pools, aquaparks, tennis, squash and badminton centers and sports halls. Climbing enthusiasts can enjoy climbing walls, and in winter there are several ice rinks. There are also shooting ranges, skateparks, the horse racing track,

golf clubs and various gyms in Wroclaw. For lovers of movie productions there are numerous cinemas located in various districts of the city, and for those who prefer to admire art there is no shortage of galleries with exhibitions. Also for those with strong nerves there will be attractions such as escape rooms. Wroclaw connects those younger and older through intergenerational events, and also integrates local communities in the city's neighborhoods by running local activity centers.

2

large, modern stadiums as multifunctional venues full of various events

12

swimming pools (indoor&outdoor) - including 3 Aquaparks (sport&recreation)

4

sports halls - group sports (handball, volleyball, basketball), athletics

8

climbing centers

10

skateparks - outdoor & indoor

6

cinemas

18

art galleries

1400

kilometres of cycle-friendly routes

20

escape rooms

Dozen + gyms...



Recreational environment

Lower Silesia is regarded as one of Poland's most beautiful tourist areas. It is a land of exceptionally unique nature as well as material historical monuments.

An expression of the architectural richness of the region is the European Route of Castles and Palaces, which are tangible traces of the history of the Lower Silesia region. These are up to 23 properties that are nowadays the pearl of the region's cultural heritage, which also bring the community together through cultural, culinary, reconstruction events organized in them.

Due to the location of Wrocław and its good road and rail infrastructure, getting to the most beautiful places in the region is convenient and fast.



9
beach bars in
areas beside the
Odra river

About

150

coffe shops
with their own
unique bean
roasters



About

915

food and beverage
facilities including
restaurants, bars,
various dining spots

Food and beverage facilities

Wrocław is a city brimming with fascinating places, including fantastic restaurants. The local dining spots are characterized by openness, creativity, and passion, drawing inspiration from travels and personal growth. The culinary scene in Wrocław reflects the city's multiculturalism, offering a wide range of flavors. Among the available culinary styles, the most prominent are Polish, Asian, Italian, French, Mexican, American, and Ukrainian cuisines. Every food enthusiast is sure to find something of interest here – from traditional regional dishes to specialties from the farthest corners of the globe!



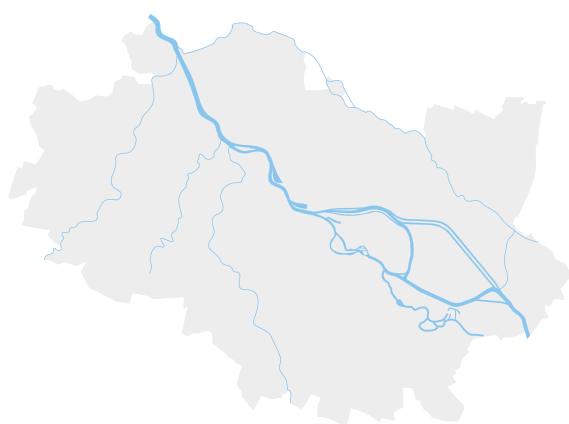
Education, investments, migration: the cornerstones of Wrocław's job market

A city of sustainable growth

Wrocław, the capital of Lower Silesia, is one of the fastest growing cities in Poland. With a population of over 673,000, it is a major cultural, scientific and economic hub of the country. The city is home to renowned universities, such as the University of Wrocław, and the Wrocław University of Technology. Graduates of these institutions feed into as many as 152,000 local and regional enterprises every year, shaping a labour market of top-notch specialists.

All this is due to the dynamic economic growth of the city, which in recent years has attracted both domestic and foreign investors. Wrocław has become a centre for businesses operating in such areas as technology, IT, financial and business services (BPO/SSC) and manufacturing. Investments in infrastructure, a favourable geographical location and openness to innovation ensure Wrocław's role as an unrivalled stronghold on the economic map of Poland and Central Europe.

Residents of Wrocław and Lower Silesia



7.6%

total population
of Poland

1.7%

unemployment
rate in Wrocław

- Wrocław has a population of 673,700. The Lower Silesian region currently has 2,879,300 inhabitants, i.e. 7.6% of the total population of Poland.
- There are 152,200 entities of the national economy operating in the city. Average employment in the enterprise sector reaches 195,000.
- The registered unemployment rate in Wrocław stands at a mere 1.7%. In the Lower Silesian region, it reaches 4.5%, and 5% in Poland.
- The number of unemployed people registered in Wrocław is 6,700.

Professionally active and in work

- In the first quarter of 2024, the professionally active people in the Lower Silesian region accounted for 61% of the population aged 15–89. In this respect, it took a high 3rd place in Poland, right behind the Masovian (63.6%) and Pomeranian (62%) regions.
- At the same time, in the first quarter of 2024, those in work accounted for 58.6% of the population aged 15–89, i.e. 1,377,000 people. The largest number of workers was recorded

in manufacturing – 277,000, the biggest professional group being made up of specialists – 384,000, and technicians and middle staff – 211,000.

3rd

place
in Poland

professionally
active people



277,000

manufacturing



384,000

specialists



211,000

technicians
and middle staff

Foreign workers

- Based on the data of Central Statistical Office and the Social Insurance Institution of almost 1.1 million foreigners working in the country, 117,500 are employed in Lower Silesia. Almost 80,000 have found a job in Wrocław.
- The largest share of the group are nationals of Ukraine, Belarus, Georgia, Moldova, India, Nepal, the Philippines, and Vietnam. As for EU-originating workers, there is a clear dominance of Germany, Spain, Italy, and France.
- Foreigners help to fill the numerous gaps in the domestic job market, especially in sectors where labour is scarce, such as construction, logistics, and services.
- Specialists from abroad bring new perspectives, experience, knowledge and competences, often in specialist positions in sectors such as IT, finance, or education.

/ Salaries

- The average gross salary in the enterprise sector in mid-2024 stood at 9,100.81 PLN. On an annual basis, it rose by 12.7%. In Wrocław alone, it was by 5.1% higher than in the Lower Silesian region.
- The average gross monthly wages and salaries in the enterprise sector by industry from January to June 2024 were as follows:



9,519 PLN
Industry



8,339 PLN
construction



9,519 PLN
trade and repair of
motor vehicles



8,339 PLN
transport and warehouse
management



6,947 PLN
hospitality and gastronomy



13,652 PLN
information
and communication



7,442 PLN
real estate services



10,792 PLN
professional, scientific
and technical activities



7,084 PLN
administration



7,286 PLN
culture, entertainment
and leisure

Higher education: a wellspring of talent

Lower Silesia boasts

115,200 students studying
in **33** higher education
institutions.

The main academic centre in the region is Wrocław, which hosts the two largest universities in terms of the number of enrolled students:

21,000
Wrocław University of
Science and Technology

20,300
University
of Wrocław

In the 2023/24 academic year, a total of 106,100 students were enrolled in tertiary education in the city.

There are

9,500

foreigners studying at the univer-
sities in Lower Silesia, the largest

group being made up of students
mainly from European countries:
Ukraine (5,091), Belarus (1,077),
Turkey (531), Spain (301),
and Germany (238).

30,600

Most students
choose Business,
Administration and Law,

and as many as

18,700

go for Technology,
Industry, and Construction.

A job market with challenges and opportunities

- Wrocław's labour market stands out with growing competition for the best talents. As more and more businesses locate their headquarters and investments in the city, the pool of available specialists is shrinking. This makes it hard for employers to attract and retain skilled workers, especially in the IT and engineering sectors, where demand clearly exceeds supply.
- That said, several upward trends seem to be drawing a promising vision of the labour market in Wrocław. Continued investment in infrastructure and education should enhance it further. The city's commitment to promoting innovation and entrepreneurship adds new job opportunities and drives economic growth.

Forecasts for employees and employers

- Wrocław stands out with its low rate of unemployment, which ensures excellent conditions for specialists looking for new professional opportunities. The dynamic development of IT, finance, manufacturing and business services centres (BPO/SSC) drives professional mobility.
- According to PageGroup's "Talent Trends 2024" survey, businesses can no longer count on employee loyalty. As many as 94% of them are open to new professional opportunities, of which 55% are actively looking for a new job, and 38% are open to job proposals, but hesitate. Interestingly, 64% of workers feel safe in their current jobs.

The labour market in Wrocław is characterised by:



optimism

many professionals express confidence in the labour market and are considering changing jobs in 2024;



skill development

there is a growing focus on new skills, especially in digital and interpersonal skills, backed by micro-credentials;



work-life balance

candidates increasingly frequent expect work-life balance and flexible working arrangements.

Recruitment and key growth sectors

- According to the Association of Business Service Leaders (ABSL), in the first quarter of 2024, there were 234 business service centres in Wrocław, employing 66,200 people. Experts predict a further increase in employment in this sector – an additional 1,400 people are expected to be taken on board in the first quarter of 2025.
- The EY "Investment Attractiveness of Europe" survey has found that in 2023, 229 new foreign direct investments (FDI) were aimed at Poland, which means an increase of 21% compared to the previous year. As Wrocław keeps attracting investments, it will surely be one of the beneficiaries of this increase.

Key employment drivers:

IT and technology: Wrocław is gaining a reputation as a technology hub, and the sector will continue to grow.

Manufacturing: The region's strong industrial base ensures stable demand for workers.

Business services: Wrocław's position as a large hub of business services centres affects employment growth.

Finance and accounting: As businesses grow, the demand for specialists in these fields will keep going up.

- All this makes sure that Wrocław not only maintains its leading position, but can also respond dynamically to the changing needs of the labour market that are yet to come.



The investment process in Poland - a detailed guide for foreign investors

Investing in Poland requires an understanding of local regulations, design stages and the specifics of the construction process. The key to success of any investment is to both tailor activities to the local requirements and effectively coordinate the work at every stage of the contraction process. Understanding local conditions, although it may initially appear complex, can be navigated efficiently and communicated transparently with the right support from strategic advisors, such as general contractors. Firstly, aligning activities with current regulations is essential to ensure compliance and minimize risks. Secondly, effective coordination of the various stages is crucial for achieving the overall success of any project.

Stage 1: Planning and requirements analysis

- Selection of the general contractor

The selection of the general contractor is an important decision in the whole process, determining the on-time and on-budget implementation of the entire investment. It is crucial to pay attention to the contractor's experience, financial stability and references. In addition, it is worth making sure that the company adheres to quality standards and communicates transparently.

It is advisable to choose a general contractor who will comprehensively guide the investor through the entire implementation process and support with expertise in the purchase of land

- Formal and legal analysis

Formal documentation must comply with Polish construction and environmental laws. In some cases, an environmental impact assessment (EIA) is required, which may affect the project schedule.

- Project scheduling

The initial project schedule should take into account the time required to obtain the necessary administrative approvals and to plan subsequent stages such as design, construction and technical acceptance.

Stage 2: Design and permitting

- Conceptual design

The first step is to develop a conceptual design that takes into account functional, technical and aesthetic requirements. The design must also meet ecological requirements and energy efficiency standards.

- Building design

The next design stage is the development of a detailed building design that takes into account all technical aspects and the requirements of the client. It mainly concerns the construction and building branch with full-branch land development (PZT).

- Procedure for obtaining a building permit

An application for a building permit is submitted to the competent administrative authority,

obtaining a decision should take up to 65 days. The complete documentation includes, among others, the building project, technical project (including branch solutions: electrical, sanitary, etc.), decision on development conditions (if there is no local plan) and certificates on the compliance of the project with environmental regulations.



Stage 3: Construction and management of the investment process

1 Open shell (Core and Shell)

Construction of the building structure and external envelope, ensuring functionality and safety.

2 Sanitary and HVAC installations

Installation of plumbing, heating, ventilation and air conditioning systems for optimum comfort.

3 Electrical installations

Execution of internal and external electrical installations, including power distribution, lighting and security systems.

4 Process installations

Installation of specialised process systems tailored to the operational needs of the facility.

5 Technology

Installation of the client's technology solutions.

6 Finishing work

Interior finishing, including floors, walls and ceilings, ensuring functionality and aesthetics.

7 Landscaping and external networks

Implementation of external works such as landscaping, car parks, access roads and connection of external installations.

Comprehensive Coordination

At each stage, the general contractor provides effective coordination and management of the process, supported by detailed designs to meet client expectations and deadlines.

Stage 4: Acceptance procedures

Completion of construction is the beginning of the acceptance process with the administrative authorities, which allows the facility to be authorised for use.

- Preparation for acceptance

Preparation for the acceptance procedure should begin 1.5 months before the facility is scheduled for occupancy. It includes such stages as supplying the facility with utilities, commissioning the equipment, conducting tests, and finalizing the acceptance documentation approved by the relevant authorities.

- Acceptance procedure

The first stage of the acceptance procedure is to obtain the opinions/statements of the Sanitary

Inspectorate and the State Fire Brigade, which should take 14 days from the submission of the application. Next, a complete application for an occupancy permit must be submitted to the Building Control, which will carry out an inspection; the waiting time is up to 21 days from the date of application.

- Occupancy permit

Once the technical acceptance is positive, you can apply for an occupancy permit, which allows you to start operations in the facility. The Building Supervision has 30 days from the date of the inspection to issue its decision.

Stage 5: Operation and support

- Warranty service

In Poland, a warranty period of several years for the work carried out is standard, including warranty repairs and regular technical inspections.



Design & Build as the most optimal cooperation model for the investor with Atlas Ward.

The investment process in Poland is transparent but requires thorough preparation and an understanding of local regulations. The Design & Build model, offered by Atlas Ward, ensures a comprehensive approach, with one entity managing both design and implementation, reducing investment time and optimising costs.

Collaboration between designers and contractors minimises the risk of errors and allows the project to be flexibly adapted to the investor's needs. Leveraging Atlas Ward's expertise, investors can rely on the efficient execution of their project, from concept to completion.



Setting up a business

The vast majority of Polish laws are codified and the legal system is based on continental European civil law principles. Poland is still improving the country's business climate, simplifying legislation and introducing the digitalisation of procedures.

/ Doing business in Poland

When deciding to enter the Polish market, the legal forms of companies should be carefully considered. The choice of the most appropriate form for a particular investment depends on a number of business, practical and formal factors.

To proceed with the process of establishing of a company smoothly, the necessary steps must be properly planned and then followed.

Each type of company in the Polish legal system has a different purpose and is tailored to the needs of a particular type of investor. The most popular are listed below:

	Limited liability company	Joint stock company	Limited partnership	Limited joint stock partnership	Simple joint stock company	Branch of a foreign entity
Key aspect	Limited liability, simple form, unformalised to a point	For major undertakings; facilitated capital raising from investors	Combination of active participation and capital investment with limited risk	Flexible form; allows the involvement of investors through the issue of shares	Flexibility and a simple management structure; no minimum share capital requirement	Ability to operate without registering a separate company

Limited liability company (LLC)

A limited liability company is the most common choice for investors. Compared to other legal forms, this is due to a number of factors. These include:

- no personal liability of the shareholders for corporate liabilities;
- the required initial share capital is low – only 5,000 PLN (approximately €1,200);
- comparatively low costs for incorporation and operation of the LLC;
- Clear and transparent rules in relation to the LLC's day-to-day management;
- LLC can even be established online, although this introduces some limitations;
- under certain conditions, LLC may operate already after signing the Articles of Association.










Timeplan to establish a LLC in Poland

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Preparation/collection of documents, agreement on the articles of association								
Signing the LLC's articles of association at the notary								
Preparation of the application and its submission to the National Court Register								
Review of the application by the court and the registration – estimated time: 1 month								
Notification to the Central Register of Real Beneficiaries / Filing for registration for VAT purposes and other registrations (if required)								

/ Investment process in overview

The entire investment related to the construction process can be divided into four main stages:

- Pre-design documentation development
- Development of investment projects and permits
- Construction process
- The process of obtaining the occupancy permit

Detailed stages of the investment process with their approximate duration											
Months	1-3M	4-6M	7-9M	10-12M	13-15M	16-18M	19-21M	22-24M	25-27M	28-30M	31-33M
Analysis of the investor's needs Application for public aid instruments (depending on the type of investment)											
Real Estate purchase											
Tender for Design Company											
Design documentation preparation and the obtaining of all necessary permits											
Selection of the General Contractor and Construction Supervision Inspector (if required)											
Legal procedures prior to the commencement of construction work											
Construction works											
Partial and fade works, as well as tests and start-ups of the process installations											
Usage permit											

/ Taxes

Corporate Income Tax (CIT)

19%	9%*	20%	5%**
income on the capital companies, limited partnerships, limited joint-stock partnerships, and certain general partnerships		withholding tax on non-resident's income earned in Poland on certain types of transactions	income concerning intellectual property which will be created, developed or upgraded by a taxpayer within its R&D activity – so-called Innovation Box

* Small taxpayers (whose gross income did not exceed EUR 2.0M in a year) or taxpayers commencing business activities.

** Income concerning license agreements, sale of IP, sale of products with IP or compensation from infringement rights of IP

Personal Income Tax (PIT)

12%	32%	19%	20%	Exempt
<ul style="list-style-type: none"> for the income up to PLN 120,000 	<ul style="list-style-type: none"> for the surplus over PLN 120,000 <p>the tax-exempted amount is currently – max PLN 30,000 per year</p>	<ul style="list-style-type: none"> business activity (self-employed) – after submitting the declaration on the linear taxation capital gains, interests 	<ul style="list-style-type: none"> withholding tax on non-resident's income earned in Poland on certain types of transactions 	<p>some types of income, such as:</p> <ul style="list-style-type: none"> return of business trip costs expenses incurred by an employer for enhancement of qualifications of his or her employees the value of some benefits paid by an employer

Tax on goods and services – VAT

23%	8%	5%	0%	Exempt
<ul style="list-style-type: none"> basic activities (all besides the below mentioned) 	<ul style="list-style-type: none"> delivery of some goods and services specified in the Act on VAT 	<ul style="list-style-type: none"> delivery of some goods and services specified in the Act on VAT 	<ul style="list-style-type: none"> export of goods intra-community delivery of goods international transport 	<ul style="list-style-type: none"> some used goods financial services

Real Estate Tax

Real estate tax rates are established individually by local law. The national law sets the maximum rate for real estate tax for each year:

- Industrial / Commercial Land**
1.34 PLN/sqm annually
- Industrial / Commercial Building**
33.10 PLN/sqm annually
- Structures**
2% of the initial asset value annually

/ Key incentives for investors

The Polish Investment Zone

Investment area

Any location in Poland



Tax exemption period

12 to 15 years, depending on location



Benefits

CIT exemption

Operating body

Special economic zones



Eligible costs

Two-year labour costs or
Costs of the investment

Qualitative criteria



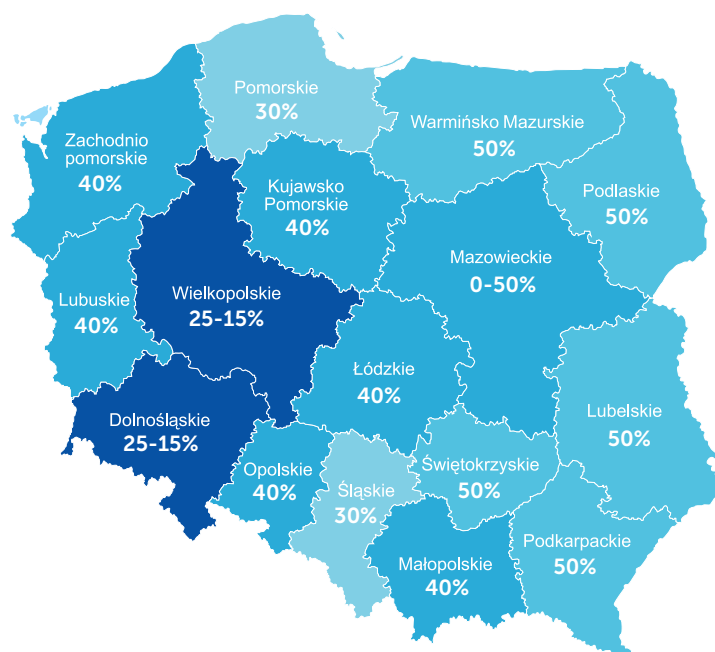
Minimum
expenditures:
PLN 10 ÷ 100
million

- The amount of eligible costs depends on the unemployment rate in the chosen region.
- Reduced investment thresholds for SME/R&D/BSS investments (reduction range: even to 98%).
- For reinvestment thresholds reduced by 50%.

Quantitative criteria

- Additional obligation to be met: qualitative criteria. Their minimum number depends on the location of the investment within Poland (4-6).
- The investor may select the required number of criteria for its location from the available 12/13 possible criteria (depending on the type of investment), however it is necessary to have at least 1 point in both categories (economic and social sustainability).

Regional state aid map (SMEs +20%/10%):



• **25%**

for dolnośląskie voivodship

• **15%**

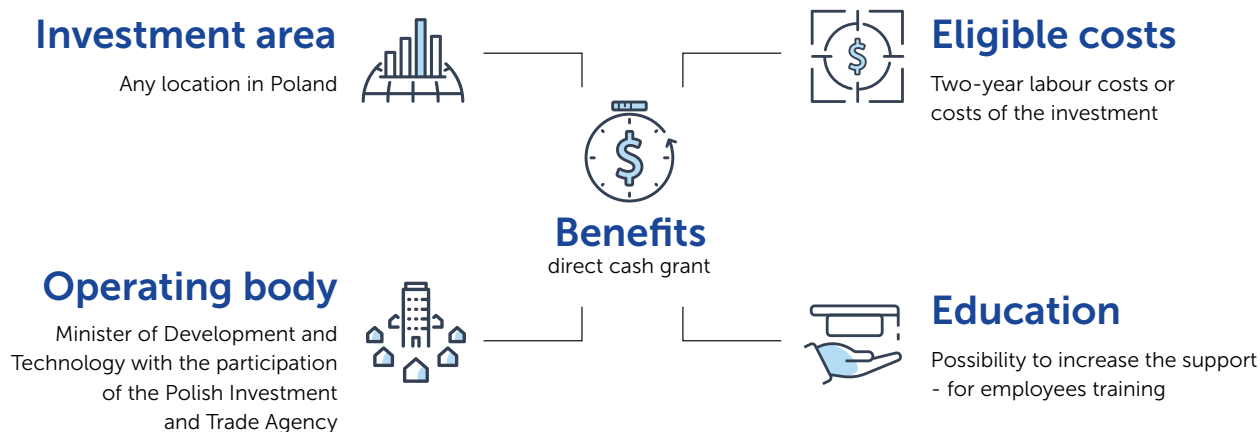
from January 1, 2025



* +10% for entrepreneurs in some regions of Śląskie, Małopolskie and Łódzkie (Just Transition Fund (JTF)).

** possible further intensity increases of 5%/10% for specific sectors (legislative works in progress)

Programme for supporting investments of major importance to the Polish economy



The aid may be granted to specific kinds of investments:

 Strategic <ul style="list-style-type: none"> Up to 5% or 15% non-SMEs Up to 10%; - 25% SMEs; 	 Innovative <ul style="list-style-type: none"> Up to 5% or 15% non-SMEs Up to 10%; - 25% SMEs; 	 Business Services Centre From 7,500 to 15,000 PLN for each new job created	 R&D Services Centre <ul style="list-style-type: none"> From 15,000 to 40,000 PLN for each new job created, or Up to 15% or 25%
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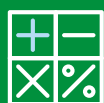
Quantitative criteria

- The amount of min. expenditures and new jobs depends on the kind of the investment.
- Reduced investment thresholds for SME from 70% (developing entrepreneur) to 98% (for micro-entrepreneur).
- For investments in an area at risk of exclusion - thresholds reduced by 50%; for reinvestment by 50% (applies only to new jobs).

Qualitative criteria

- Additional obligation: the need to meet from 4 to 6 quality criteria. Their number depends on the location of the investment. The entrepreneur may choose up to 10 of them.
- The number of declared criteria increases the amount of potential aid.

Example calculation of grant amount (non-SME, strategic investment, in Wałbrzych, 8 declared qualitative criteria):



$$\text{EUR } 50,000,000 \times 15\% \times 8 \div 10 = \text{EUR } 6,000,000$$

Aid amount (PLN) = a x b x c ÷ 10

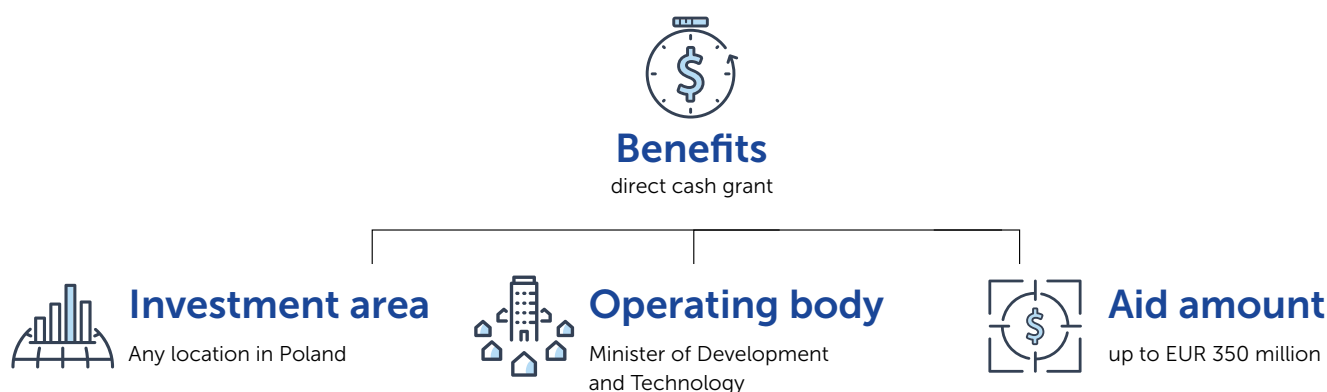
where the individual symbols stand for:

a – amount of investment costs (EUR),

b – maximum aid intensity (%),

c – result of a qualitative investment assessment

/ Temporary Crisis and Transition Framework



Quantitative and supplementary criteria

- The amount of min. expenditures and new jobs: EUR 110 million; 50 new employees.
- Meeting of at least 5 supplementary criteria (out of 14). The number of points declared is relevant to the final amount of aid.



Time limitation

The aid is granted until December 31, 2025, and the project may last up to 7 years

Aid for investment related to production of:

1. relevant equipment for the transition towards a net-zero economy: batteries, solar panels, wind turbines, heat-pumps, electrolysers, and CCUS equipment;
2. key components designed and primarily used as direct input for the production of the equipment defined above;
3. related critical raw materials necessary for production of the equipment and key components defined in 1-2 above (and recovery).

Aid intensity and limits



15% - 150 mln EUR

for Warsaw municipality

20% - 200 mln EUR

for dolnośląskie and wielkopolskie voivodeships, as well as municipalities located in mazowieckie voivodeship, listed in the TCTF Regulation

35% - 350 mln EUR

for the rest of Poland

R&D relief

R&D relief is a tax preference that allows you to reduce the tax base by the costs of research and development activities that have been included by the taxpayer in tax deductible costs (eligible costs).

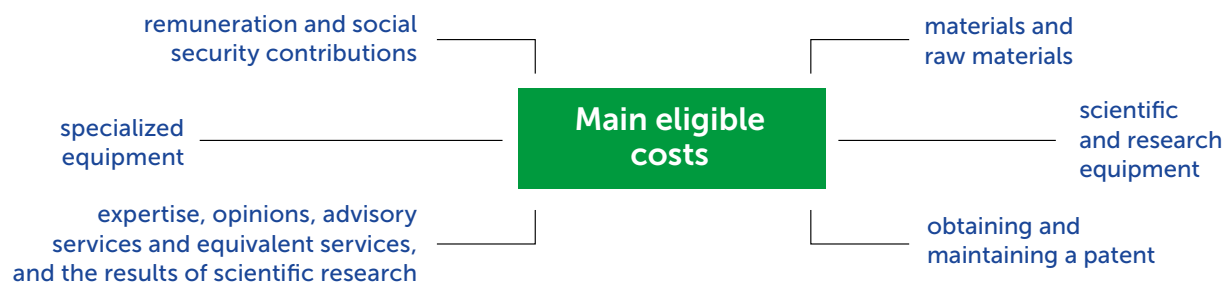
The entrepreneurs may deduct 200% of eligible employee costs and 100% of other eligible costs.

The R&D centers deduct 200% of all costs (apart from big

companies in the scope of patents – in this case 100%).

Every entrepreneur involved in the technological development of products/processes may benefit from this tax preference.

The result of R&D work is not necessary (the R&D project does not have to end in success/commercialization).



IP Box

A preferential tax rate on income (5%) generated from the commercialisation of intellectual property rights, created, developed or improved by an innovative company

(i.e. one that carries out research and development work) as part of its business activities



R&D & IP box advantages – key facts

R&D

- the possibility of using it also in the event of a loss or when the deduction amount exceeds the tax base (then the deduction in the next 6 tax years)
- the possibility of benefiting from tax relief while having the CIT exemption decisions
- tax mechanism to be used any time during a fiscal year
- R&D relief can be combined with the IP BOX

R&D IP BOX:

- 5% CIT rate on qualified income
- the period of application of the relief - the entire duration of legal protection of qualified intellectual property rights
- support not only for the IT sector

A photograph of a modern office interior. In the foreground, there are several desks with computer monitors and ergonomic chairs. Potted plants are placed on the desks. The office has large windows with decorative glass patterns. The ceiling features exposed wooden beams and long, black, rectangular pendant lights. The overall atmosphere is professional and contemporary.

Office market

As one of the largest regional office markets in Poland, Wrocław has an undeniable impact on the overall office trends in the country, both for tenants and building owners. At the end of the second quarter of 2024, the total modern office space reached almost 1.38 million square meters, while additional 36.6 thousand square meters remain under construction.

/ Wrocław office market – key figures



137,400 sqm

Average annual take up
(2019-2023)

2024 YTD: 50,000 sqm



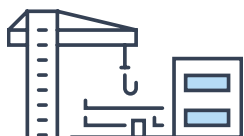
24,200 sqm

Average annual absorption
(2019-2023)

2024 YTD: 19,500 sqm

1,378,400M sqm

Office stock



36,600 sqm

Supply under construction



18.25%

Vacancy rate

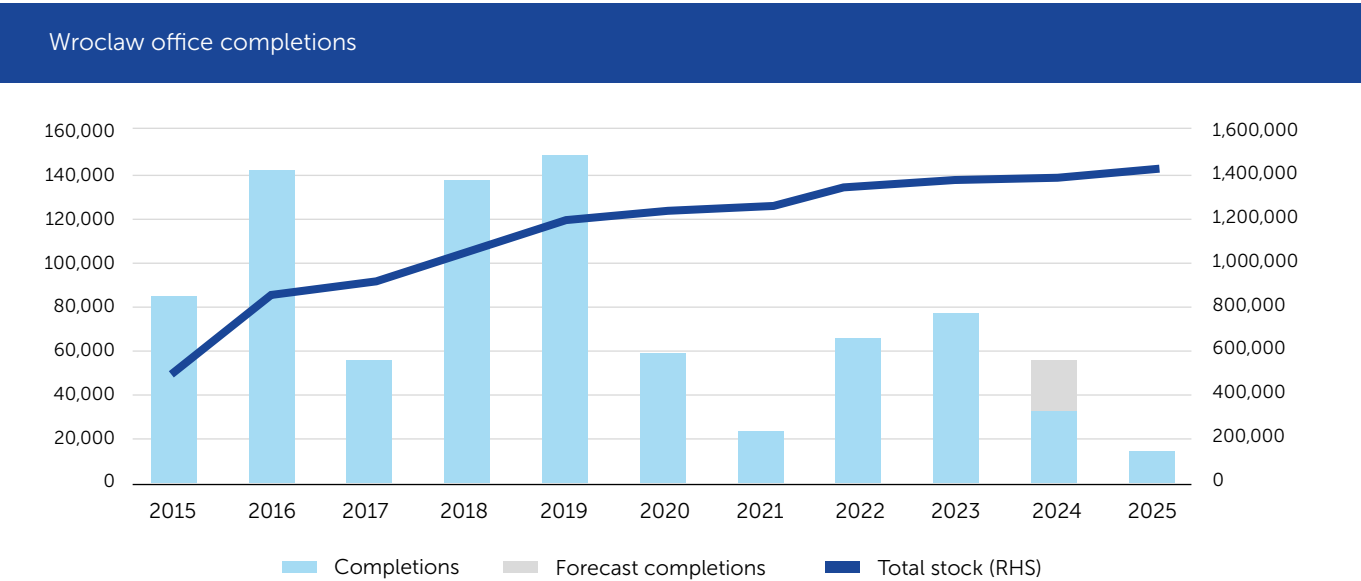
Selected buildings under construction

Building name	Office space (sqm)	Developer	Planned completion
Artefakt	8,800	I2 Development	Q4 2024
Entire M	13,000	Investment M	Q4 2024
Swobodna SPOT (phase I)	14,800	Echo Investment	Q2 2025

Office stock evolution

Wroclaw remains as the third largest office market in Poland, after Warsaw and Krakow. It is also one of the only 3 regional office markets to exceed 1 mln sqm, with almost 1,378,400 sqm of modern space present as at the end of Q2 2024. During last 5 years it was also one of the fastest developing regional markets in Poland, adding almost 385,000 sqm of new office space since Q2 2019, which constitutes an increase of over 16%.

Today, not unlike in other regional Polish cities the pipeline is at the lowest level in 10 years, as the developers leave a margin for the already constructed space absorption. As of the end of Q2 2024 only 36,600 sqm of modern office space remains under construction among 3 schemes, to be finished by the end of 2025.



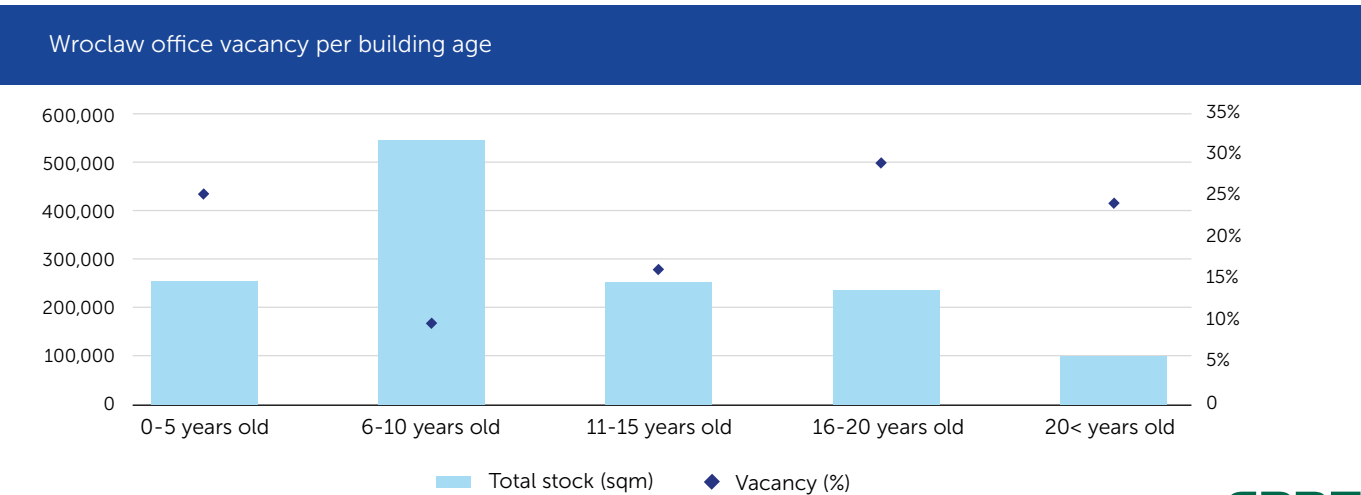
Vacancy

Vacancy in Wroclaw remains relatively high, reaching 18.25% at the end of the second quarter of 2024. This translates to approximately 251,500 sqm of space readily available for rent, leaving a lot of possibilities for new tenants.

The rate of vacant space vastly differs among different building age groups, with the lowest (10.25%) recorded in 6-10 years old buildings in the second leasing cycle. These buildings, completed between 2014 and 2019

also constitute the largest part of the local office market, summing up to almost 551,200 sqm (40% of the total modern office space in the city).

The newest buildings, completed within last 5 years remain in the process of commercialisation with 25.86% of the space remaining available for tenants. This translates into 64,100 sqm still available in the newest schemes.



Take-up and absorption remain strong

While vacancy level in Wrocław office market is relatively high, the market remains strong as evidenced not only by a healthy amount of demand, but also the highest YTD absorption among all regional markets in Poland.

The total take-up recorded in the first half of 2024 equals almost 50,000 sqm. While this is an amount 43% lower than in the corresponding period of 2023, it is important to consider that the previous year recorded one of the highest demand levels in history. At the same time, current year YTD demand remains at a study level, fairly close to the average for preceding years.

Absorption on the other hand, which reflects the true pace of market development, exceeded expectations. While on most regional markets it remained low or even negative, only in the first half of 2024 Wrocław recorded over 19,500 sqm, which constitutes almost 66% of the average total yearly absorption (2019-2023).

Asking terms and conditions

- Standard asking rents in primary locations: 13.00-16.00 EUR/sqm/month
- Standard asking rents in secondary locations: 11.00-13.00 EUR/sqm/month
- Standard rental period: 36-60 months
- Standard service charge: 3.50-5.80 EUR/sqm/month
- Typical rent free period: 5-10 months
- Typical shell & core cash contribution: 500-650 EUR/sqm

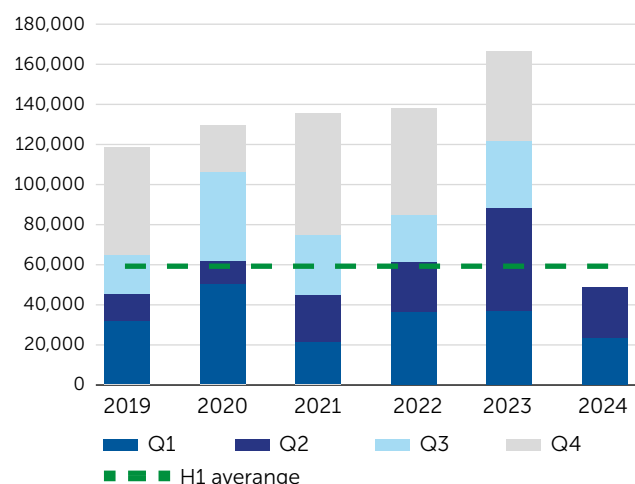
Investment market in Poland

The current sentiment towards investing in office real estate is moderately optimistic - many players are still holding back, while others are changing their investment profile and closing office funds on a global or regional scale.

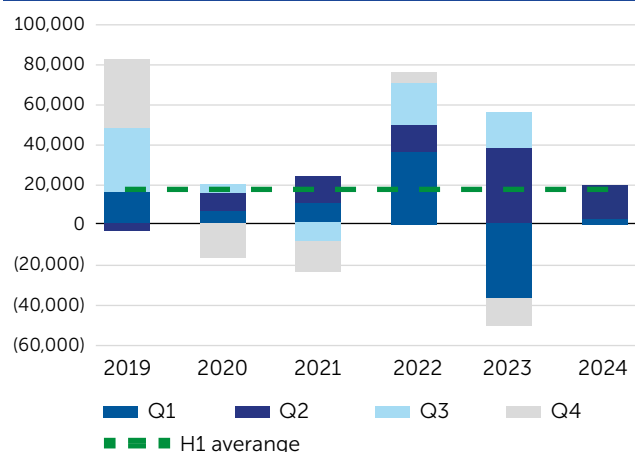
The office market in many countries is currently under significant pressure - the environment of high interest rates is still a barrier for many, and the simultaneous redefinition of the approach to office space and the stabilization of hybrid work as the new normality are the main (yet not the only) factors affecting the market. The total investment volume in Europe in 2023 fell by 47% year on year.

However, Warsaw stands out significantly compared to other European cities - the average annual absorption of office space in the last 5 years is the second highest in Europe, and tenant activity in relation to the size of the market, understood as the share of demand in supply, has also achieved the second highest result, right after Budapest.

Quarterly demand (2019-2024 YTD)



Quarterly absorption (2019-2024 YTD)



Investors are closely monitoring market parameters and closely watching Poland. In the CBRE European "Investor Intentions Survey" conducted in December 2023, which surveyed nearly 900 investors, 81% of them stated that their purchasing activity in the CEE (Central and Eastern Europe) region in 2024 will be the same or higher than in the previous year. Sentiment towards the office sector has slightly worsened, from being indicated by 29% of investors in 2023 to third place in 2024 (interest from 18% of investors). In the ranking of countries where investors expect to achieve the highest returns on investment in the current year, Poland is in third place, right after the United Kingdom and Germany. Warsaw itself ranks eighth in the ranking of the most attractive investment cities in Europe. These data inspire great optimism, and the high quality of office buildings in Poland and the good standing of their tenants will certainly contribute to the return of investor interest, especially with projected interest rate cuts by the ECB.



Warehouse market

Wroclaw region is currently the fourth most developed market in Poland after Warsaw Region, Silesia and Central Poland considering modern warehouse stock. So far, almost 4.47 million sqm of modern warehouse and industrial space have been delivered in the region.

Selected industrial and logistics parks in Wrocław



EXISTING PARKS

- | | | |
|--------------------------------------|--|---|
| 2. 7R City Flex Wrocław II | 30. Mapletree Park Wrocław II | 62. Panattoni Park Wrocław XI |
| 5. Amazon Wrocław | 33. MLP Wrocław | 66. Prologis Park Wrocław |
| 6. BIK Park Wrocław I | 34. MLP Wrocław West | 67. Prologis Park Wrocław III |
| 9. City Logistics Wrocław North | 35. Mountpark Wrocław | 68. Prologis Park Wrocław IV |
| 10. Citylink Wrocław Stadion SBU | 38. P3 Wrocław City | 69. Prologis Park Wrocław V |
| 11. DL Invest Park Legnica SBU | 39. P3 Wrocław II | 73. S5 Wrocław North Gate (X) |
| 12. DP Portfolio - Legnica | 45. City Logistics Wrocław I | 74. Segro Business Park Wrocław I |
| 13. EOT Exeter Bielany Wrocławskie I | 49. Panattoni Park Legnica | 76. Segro Industrial Park Wrocław |
| 14. EOT Exeter Wrocław Mirkow | 51. Panattoni Park Wrocław Airport | 77. Segro Industrial Park Wrocław II |
| 15. Eurologis Centrum Logistyczne | 52. EOT Exeter Dobrzykowice | 78. Segro Industrial Park Wrocław II (Awicenny) |
| 17. Frontier Park Wrocław | 53. Panattoni Park Wrocław II | 79. Segro Logistics Park Wrocław |
| 18. GLP Wrocław IV Logistics Centre | 54. Panattoni Park Wrocław III | 80. Tiner Logistics Park |
| 19. GLP Wrocław V Logistics Centre | 55. EOT Exeter Bielany Wrocławskie II | 81. VATT Invest Wrocław |
| 21. Hillwood Olesnica | 56. Panattoni Park Wrocław South Hub | 82. Wrocław Business Park |
| 24. Hillwood Wrocław Wschod II | 57. Panattoni Park Wrocław North Gate II | 83. Wrocław Siechnice Logistics Centre |
| 25. Ideał Idea City Park Wrocław | 59. Panattoni Park Wrocław S8 South | 84. Wrocław Wojkowice Logistics Centre |
| 28. Logikor Wrocław II | 60. Panattoni Park Wrocław VII | 85. Wrocław-Bielany Logistics Centre |
| 29. Logikor Wrocław IV | 61. EQT Exeter Wroblowice | |

PLANNED WAREHOUSE PARKS

- | | |
|---|-------------------------------------|
| 1. 7R City Flex Wrocław Airport II | 86. Panattoni Park Legnica II |
| 3. 7R Park Legnica | 87. ECE Kąty Wrocławskie |
| 4. 7R Park Wrocław West li | 88. DL Invest Park Wrocław Mokronos |
| 20. CTPark Legnica | 89. EOT Exeter Wrocław South |
| 26. LCube Logistic Park Wrocław | 92. Hillwood Wrocław (Malin) |
| 36. P3 Wrocław | 93. Panattoni Park Campus 2 |
| 58. Panattoni Park Wrocław North Gate III | 94. Panattoni Park Airport II |
| 75. Segro Centre Wrocław, Zmigrodzka | 100. Lcube Wrocław East II |

EXISTING BTS (BUILT TO SUIT) PROJECTS

- | |
|---|
| 7. BTS Manuli |
| 27. Logikor Wrocław I CBTS Whirlpool) |
| 31. Mapletree Park Wrocław III (TIM BTS) |
| 32. Mapletree Park Wrocław III (TIM li BTS) |
| 37. P3 Wrocław (BTS DHL) |
| 40. Panattoni BTS Gates Legnica |
| 43. Panattoni BTS Lear |
| 63. Panattoni Park Wrocław XII (Zabka BTS) |
| 65. Panattoni Wrocław (BTS Amazon) |
| 71. Propco BTS Kobierzycze |

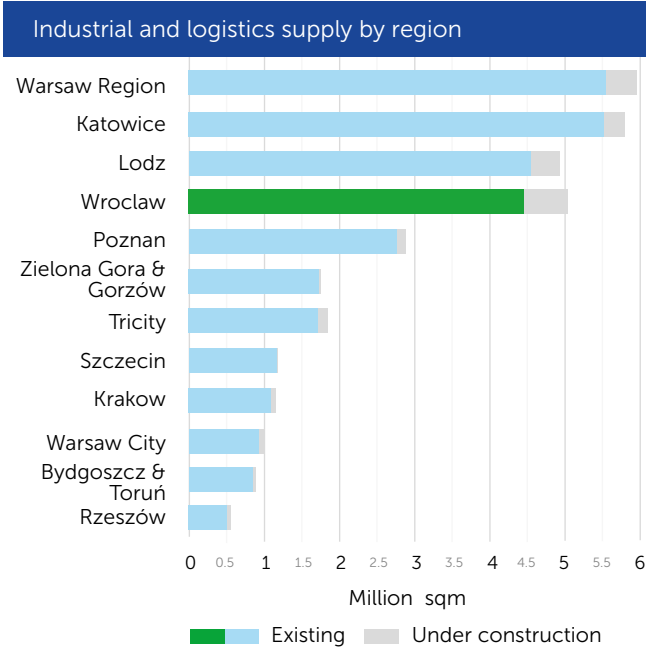
Region overview

The Wrocław region is considered one of the most attractive industrial and logistics markets in Poland and Eastern Europe. Its popularity can be attributed to its convenient location, which offers easy road access to the rest of the country, as well to the Germany and the Czech Republic. The region is equipped with a well-connected transportation network, including the A4 and A8 motorways, the S8 and S5 expressways, and an international airport. The transit infrastructure is constantly improving and developing, with an example of the next section of the west bypass of the city being in the works at the moment. Thanks to the developed infrastructure network, the Wrocław agglomeration is often chosen as a place for locating warehouse space of companies from all sectors: logistics, technology, manufacturing, as well as retail and e-commerce.

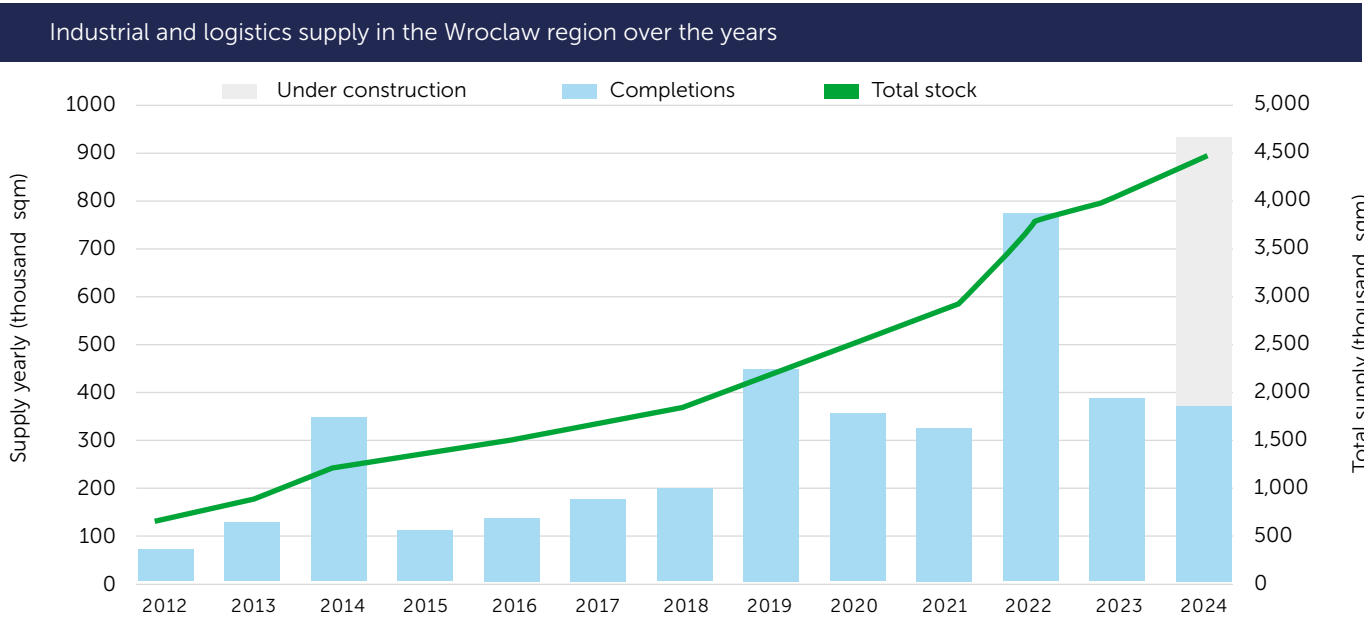
Moreover, incentives and public aid offered by Special Economic Zones as well as favourable investment climate of Wrocław City are important location drivers for manufacturing companies, resulting in a large share of foreign direct investment in the region. In the past few years Wrocław has become a manufacturing hub for the dynamically developing e-mobility sector.

The Wrocław region warehouse market keeps growing in the sustainable solutions aspect as well. It can be seen, for example, in 7R Park Wrocław West II. The warehouse, developed in the second quarter of 2024, incorporates cutting-edge technologies that effectively decrease CO2 emissions by 50%.

Another example of the modern sustainable industrial space is Panattoni Park Wrocław Logistics South Hub, which was expanded and put into use in the first quarter of 2024. A variety of modern technologies was used during the construction of the park, reducing emissions and meeting market standards for



sustainable construction. With the Wrocław region being one of the representatives on the industrial and logistics markets in Poland, an increasing number of developers are prioritizing the environmental aspects of their new projects.



Developers activity and new projects

Industrial developers delivered 150,700 sqm of new space in the region during the second quarter of 2024 and 218,300 sqm in the first quarter. The largest completion in the region in Q2 2024 was Hillwood LCube Wroclaw East, with 59,300 sqm of modern warehouse space delivered. Additionally, two more projects were completed in Q2 - Panattoni Park Boleslawiec Modlowa with 49,500 sqm and 7R Park Wroclaw West II with 41,900 sqm.

Wroclaw industrial and logistics real estate market has grown by 12% in a year (since the end of Q2 2023 up until Q2 2024). Currently 568,200 sqm of modern warehouse space is under construction. 38% of this space (approximately 216,300 sqm) is not secured by pre-lease agreements and will be ready within the next few months. Developers exhibit a more cautious approach these days and rather don't begin new constructions until a substantial pre-lease in a project is secured. At the same time the demand for modern warehouse space remains relatively high. One new development was started in Q2 2024 - next phase of Panattoni Park Wroclaw Logistics South Hub offering 35,000 sqm of modern warehouse space.

Rents

Headline rents remained relatively stable in the last quarters after a large increase in 2022 and are expected to stay at the similar levels in coming months. Currently, prime headline rents in the region are recorded within the range of 4.20 – 5.40 EUR / sqm/ month.

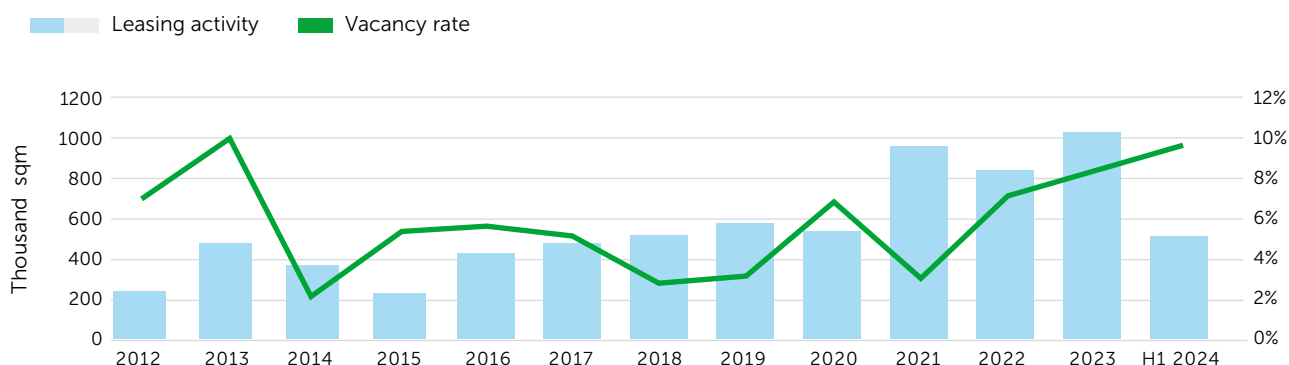
Leasing activity and vacancy rate

Vacancy rate in the Wroclaw region was at an average level of 9.40% at the end of H1 2024, and in a year-to-year perspective increased by 1.6 percentage point. The vacancy rate in the Wroclaw region is slightly higher than the average rate in Poland at the end of H1 2024 - 8.29%. The availability of vacant space is higher compared to the previous years, as the Wroclaw region experienced a large increase of the supply in the first half of 2024 - 369,000 sqm which has not been yet entirely absorbed by the market.

Tenants' interest in industrial and logistics space in H1 2024 in the Wroclaw region was the highest amongst other regions in Poland. The demand for industrial and logistics space amounted to 455,700 sqm in Q2 2024, with two transactions over 90,000 sqm and two transactions over 50,000 sqm, whereas in whole H1 2024 it amounted to 526,900 sqm. The largest transaction which was signed in 2024 so far in the Wroclaw region was the renegotiation of LX Pantos contract in Prime Logistics Wroclaw for 98,700 sqm.

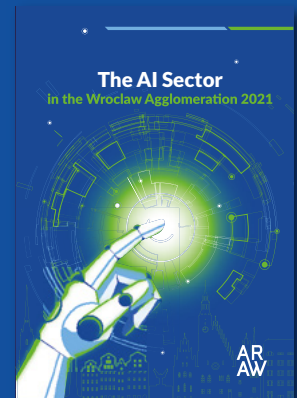
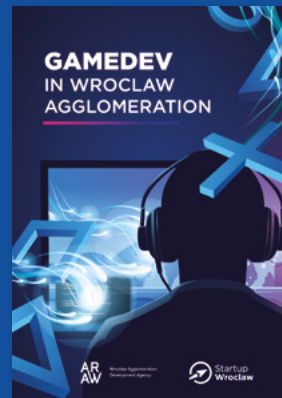
New lease agreements, together with expansions of existing footprints accounted for 47% of the total leasing activity registered this year in the Wroclaw region, whereas 53% of the leased space were contract renewals in H1 2024. The Wroclaw leasing market was dominated by 3PL operators - logistics tenants, who rented 39% of the modern space leased in H1 2024 in the region. E-commerce business plays an important role and further growth of the sector is predicted as a consequence of the changing consumer shopping preferences. Such situation will result in a growing need for modern logistics space in both the short and long term.

Total leasing activity and vacancy rate in the Wroclaw region



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Wrocław Agglomeration
Development Agency



Invest in
Wrocław



Startup
Wrocław

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supporting
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