



Invest in  
**Wrocław**

WROCLAW AGGLOMERATION  
DEVELOPMENT AGENCY

IDEAL PLACE FOR  
YOUR INVESTMENT



- **Wrocław Agglomeration Development Agency (ARAW)**
- created in 2005 to support foreign investors in the Agglomeration on each step of the investment process
- owned by the City of Wrocław and **29 surrounding communes**
- local partner of **Polish Information and Foreign Investment Agency (PAIiZ)**

# WHY WHROCLAW?

GENERAL OVERVIEW



Top 10 countries by FDI projects					Top 10 countries by FDI job creation				
		2013	2014	Change			2013	2014	Change
1	UK	799	887	11%	1	UK	27 953	31 198	12%
2	Germany	701	763	9%	2	Russia	13 621	18 248	34%
3	France	515	608	18%	3	Poland	13 862	15 485	12%
4	Spain	221	232	5%	4	France	14 122	12 577	-11%
5	Belgium	175	198	13%	5	Germany	10 350	11 327	9%
6	Netherlands	161	149	-7%	6	Romania	6 157	10 892	77%
7	Poland	107	132	23%	7	Spain	11 138	9 750	-12%
8	Russia	114	125	10%	8	Turkey	8 696	8 175	-6%
9	Turkey	98	109	11%	9	Slovakia	3 493	7 978	128%
10	Ireland	111	106	-5%	10	Ireland	6 895	7 306	6%
	Other	955	1 032	8%		Other	49 996	52 647	5%
	<b>Total</b>	<b>3 957</b>	<b>4 341</b>	<b>10%</b>		<b>Total</b>	<b>166 283</b>	<b>185 583</b>	<b>12%</b>

Source: EY's Global Investment Monitor, 2015.



## EUROPEAN CITIES AND REGIONS OF THE FUTURE 2014/2015

2<sup>nd</sup> in Top 10 Eastern European Cities

Budapest, **Wroclaw**, Katowice, Plzen, Moscow, Brno, Poznan, Ostrava, Bratislava, Prague

2<sup>nd</sup> in Top 10 Eastern European Cities

### FDI Strategy

Katowice, **Wroclaw**, Poznan, Ostrava, Lodz, Plzen Brno, Lublin, Kharkiv, Krakow

6<sup>th</sup> in Top 10 Large European Cities

### Business Friendliness

Saint Petersburg, Amsterdam, Cologne, Oslo, Munich, **Wroclaw**, Manchester, Frankfurt, Riga, Hamburg

## WROCLAW IN POLAND



4<sup>th</sup> largest city



3<sup>rd</sup> academic centre



2<sup>nd</sup> fastest growing city



1<sup>st</sup> place in attracting FDI



## POPULATION

City:	634 500
Agglomeration:	1 200 000
Region:	2 900 000

## UNEMPLOYMENT RATE

City:	3.5%
Agglomeration (excl. Wroclaw):	9.1%
Region:	9.2%



- **East-West: A4 motorway** (GER-UA), A18 to Berlin
- **Wrocław motorway ring A8** connects with S8 to Warsaw
- **North: Express road S5 to Poznań** – in operation by 2017
- **North-South: Express road S3 to Szczecin** – under construction, in operation by 2023
- Dense network of existing national roads and railway connections

## Numerous connections with European hubs

Destination	Mon	Tue	Wed	Thu	Fri	Sat	Sun	TOTAL
Frankfurt a.M.	3	3	3	3	3	2	2	19
Munich	3	3	3	3	3	2	2	19
Copenhagen	2	2	2	2	2	--	2	12
London Stansted	2	1	2	1	2	1	2	11
Warsaw	6	6	7	7	7	6	7	46

In 2014 we were voted the best regional airport in Poland and the second best airport in general.



### Airports – General

1. WARSAW CHOPIN AIRPORT
2. WROCLAW STRACHOWICE
3. KATOWICE PYRZOWICE

### Airports – Regional

1. WROCLAW STRACHOWICE
2. KATOWICE PYRZOWICE
3. GDANSK LECH WALESZA





## Transport infrastructure:

- Motorway ring, eastern ring, Leśnica bypass
- Airport terminal
- Main railway station
- Intelligent transport system
- New tram lines and modern vehicles

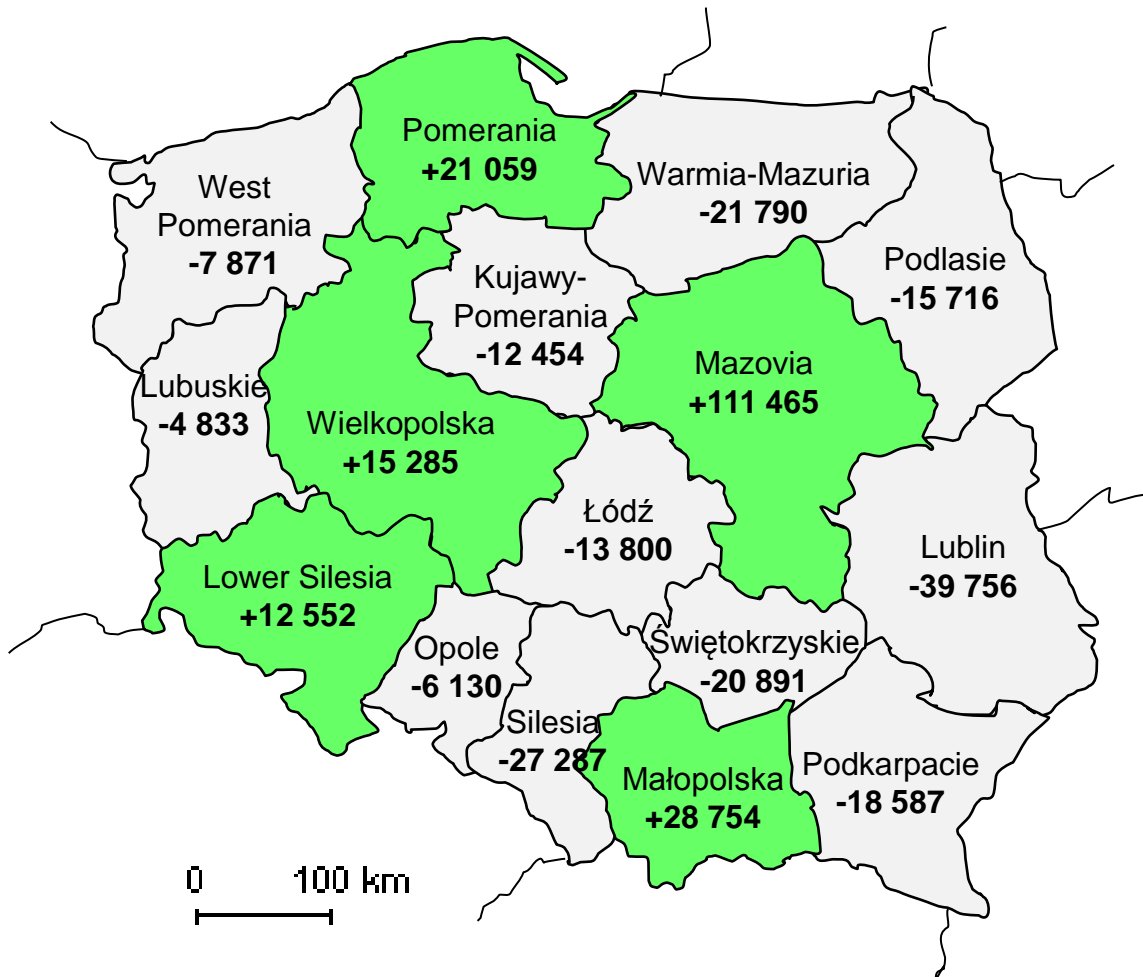
## Quality of Life:

- New waterworks and sewage treatment plants
- Municipal Stadium
- Multiple culture & leisure facilities
- National Forum of Music

WHY WHROCLAW?

GREAT POTENTIAL IN PEOPLE





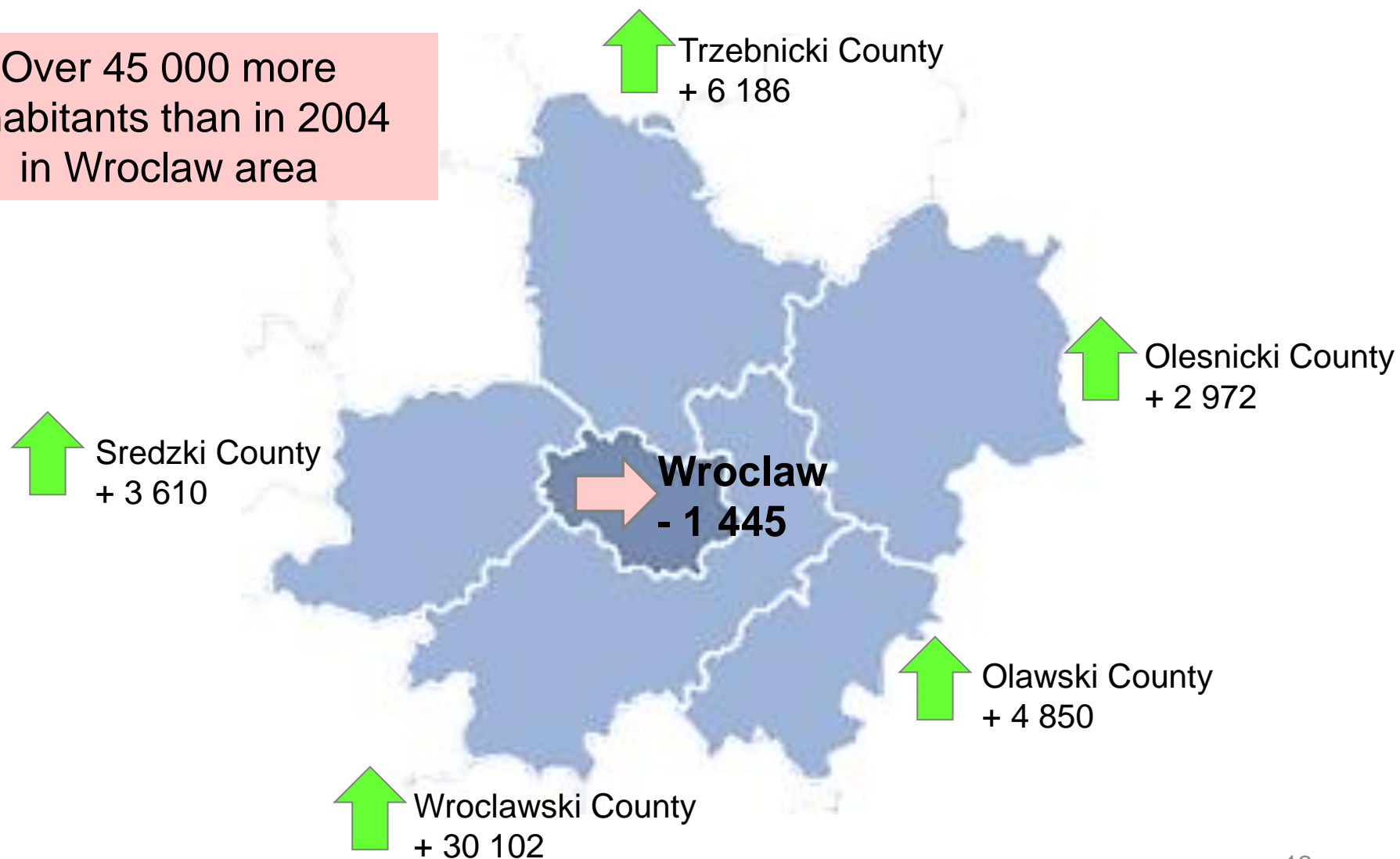
Lower Silesia is one of the five regions in Poland that attract newcomers.

Principal reasons for migrations within Poland:

- ❖ **Education**
- ❖ **Employment**
- ❖ **Family.**

Source: Central Statistics Office, 2015.

Over 45 000 more inhabitants than in 2004 in Wrocław area





- **122 000** university students in 2014, **52 000** SSC/BPO relevant students
- **32 000** graduates p.a., **19 000** SSC/BPO relevant graduates
- SSC/BPO relevant majors: business, management, F&A, IT, philology
- **Over 96% of students speak English**

## Major universities in Wrocław

Educational establishment	Students	Graduates
Wrocław University	25 700	6 500
Wrocław University of Technology	34 100	7 500
University of Economics	12 700	3 500
University of Life Sciences	10 500	2 500
Medical University	5 500	1 500

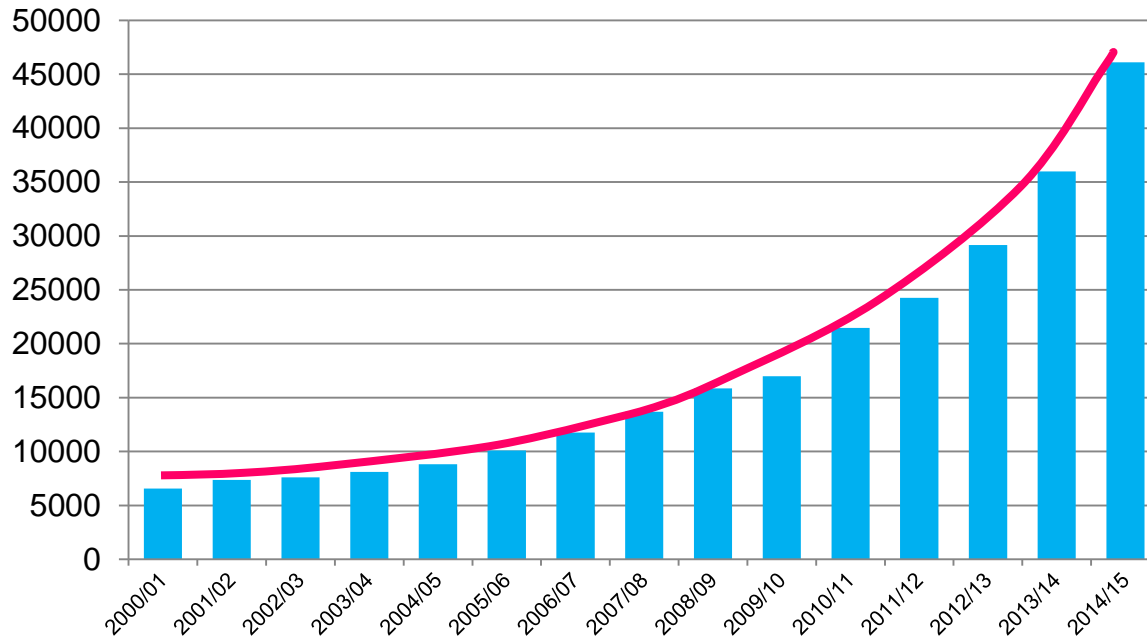
<b>Major</b>	<b>Students</b>	<b>Graduates</b>
Management	<b>14 000</b>	<b>3 500</b>
F&A	<b>8 500</b>	<b>3 000</b>
IT	<b>7 400</b>	<b>1 500</b>
Economy	<b>5 000</b>	<b>1 100</b>
Administration	<b>3 500</b>	<b>1 600</b>
Philologies: English, German, Italian, Spanish, French, Russian, Ukrainian, Dutch, Serbian and Croatian, Czech, Indian	<b>6 000</b>	<b>2 000</b>

Source: Central Statistics Office, 2014.

<b>Language</b>	<b>Students</b>
English	2143
German	1107
Spanish	528
French	280
Italian	169
Czech	142
Ukrainian	74
Dutch	232
Croatian and Serbian	92
Russian	380

Source: Central Statistics Office, 2014.

## Foreigners enrolled in Polish universities



Foreign students are usually from:

- Ukraine
- Belarus
- EU countries
- Scandinavian countries

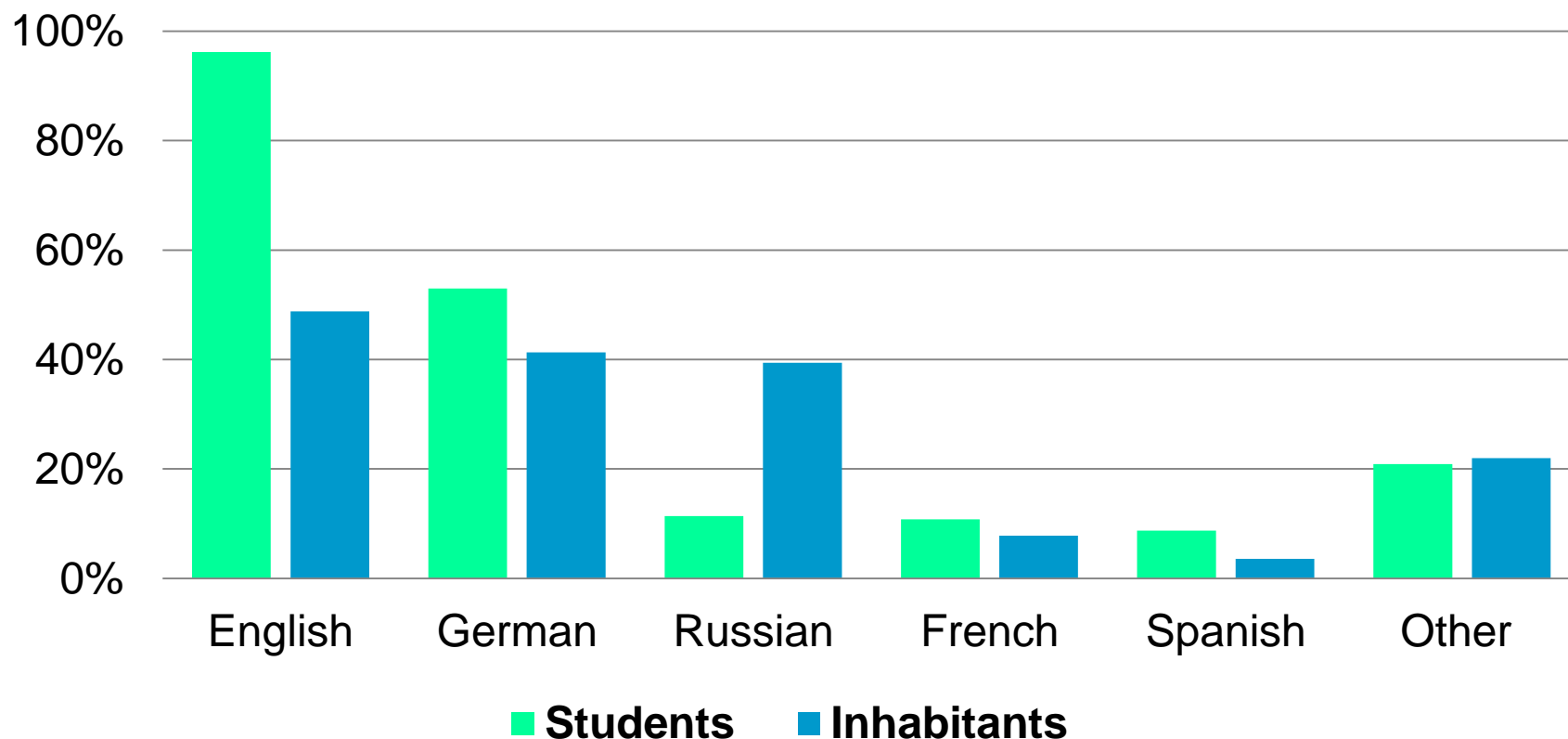


There are **3 670 foreign university students** in Wroclaw (4th place in Poland):

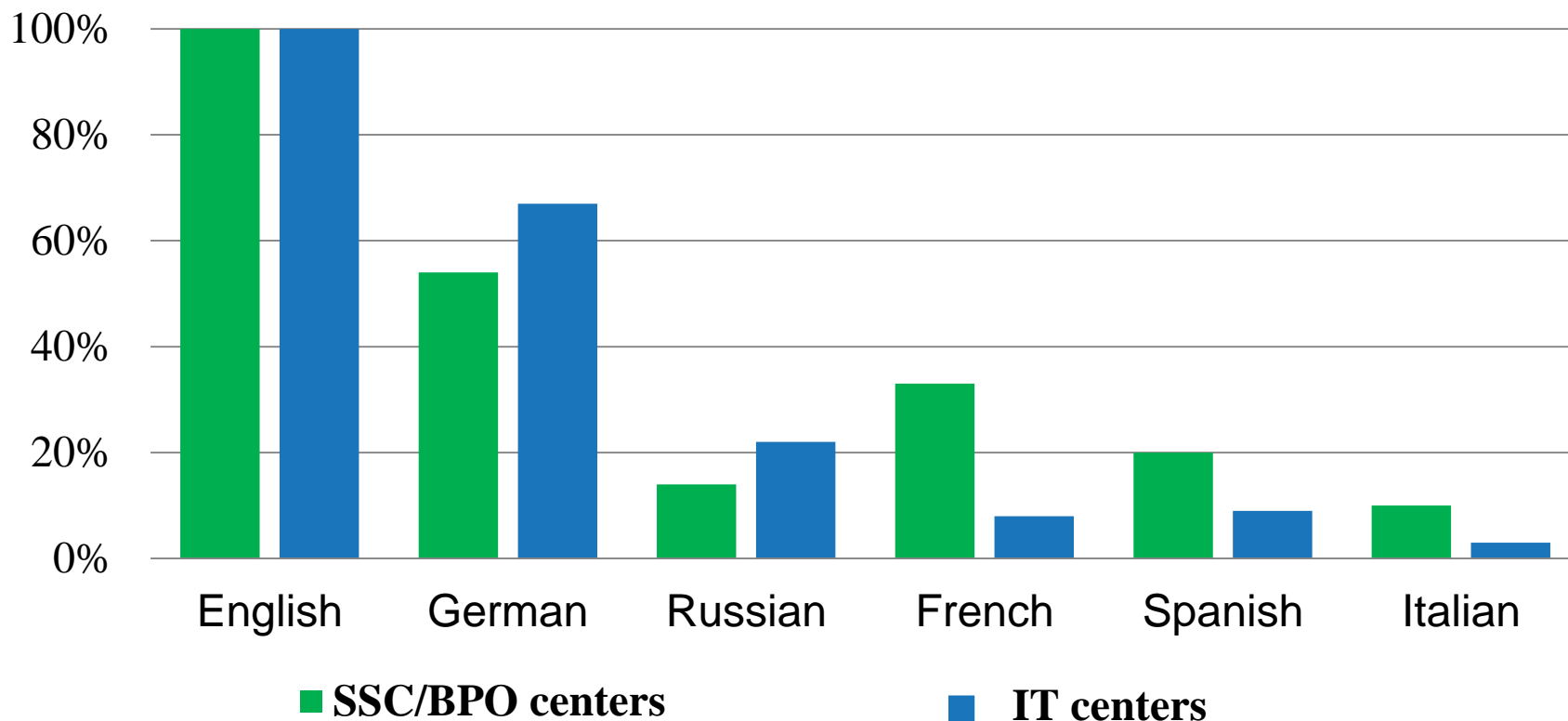
- over 200 IT students
- over 150 philology students
- over 800 business/F&A students



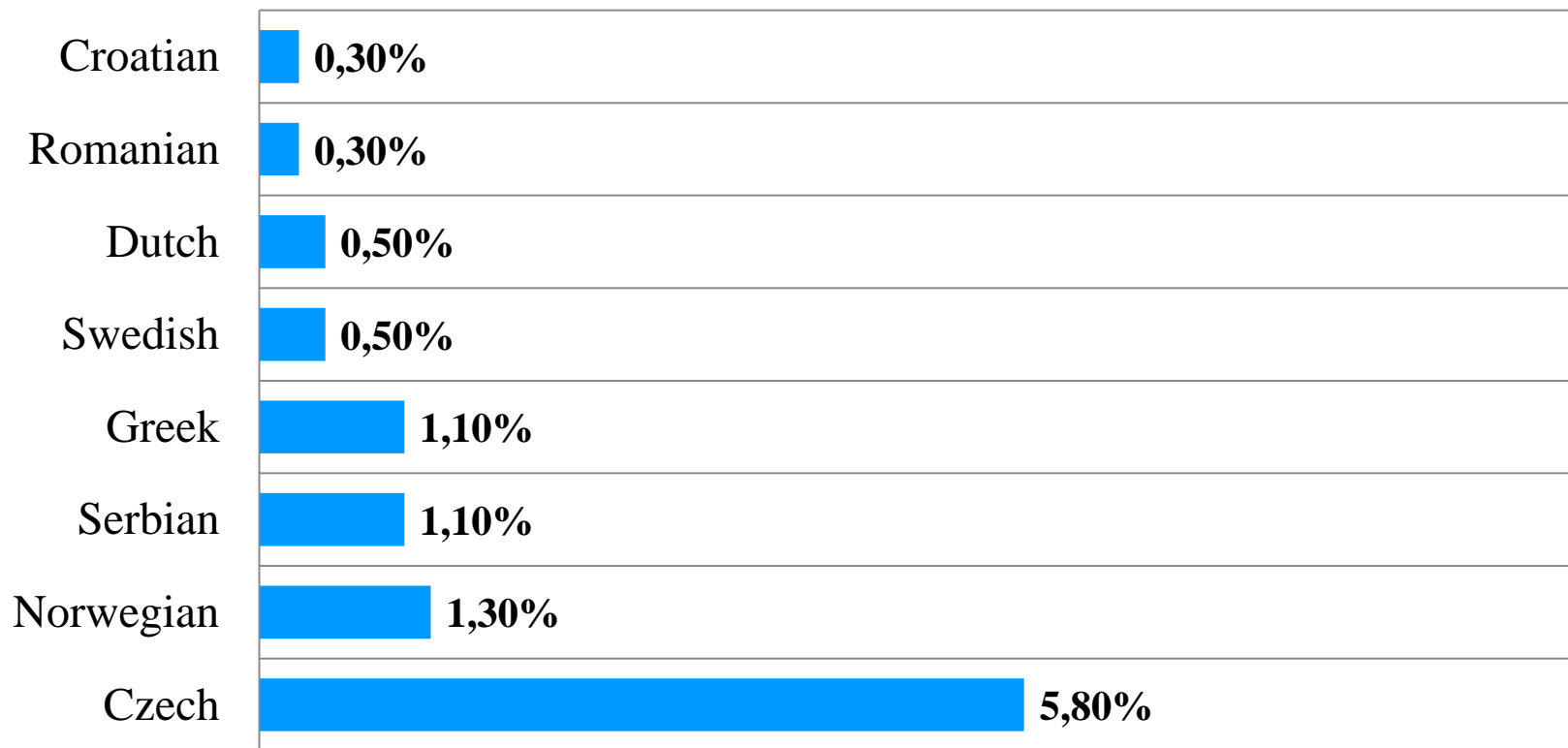
## Command of foreign languages among students and inhabitants in Wroclaw



## Command of foreign languages – SSC/BPO & IT employees in Wroclaw



## Command of less popular European languages – SSC/BPO & IT

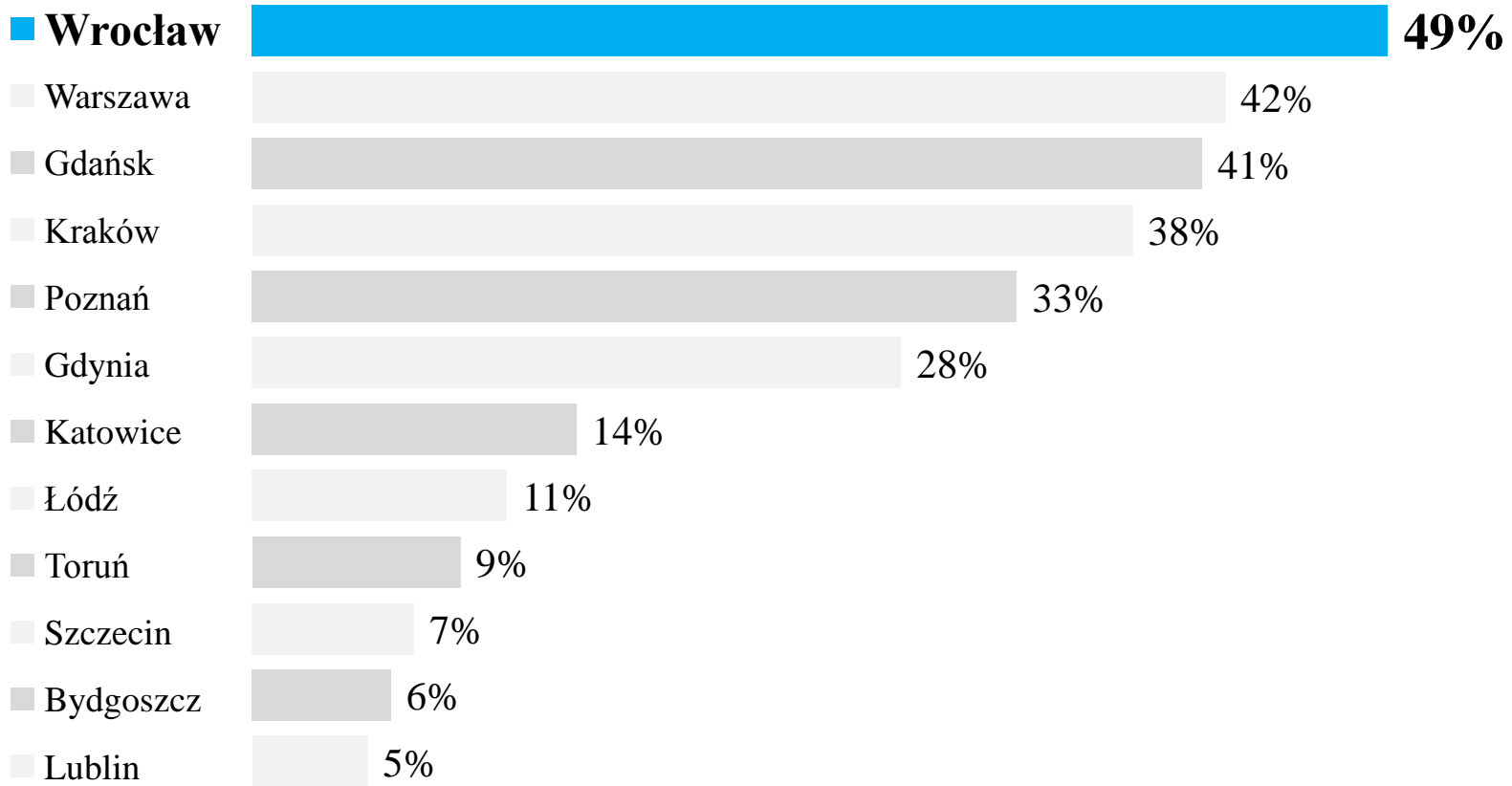


# WHY WHROCLAW?

DEVELOPED BUSINESS  
ENVIRONMENT



## Polish cities attractive for relocation in the opinion of Polish executives and managers.



## AUTOMOTIVE

**WABCO**



**TOYOTA**

**BASF**



## WHITEGOODS & ELECTRONICS



**Electrolux**

**B/S/H/**

## MECHANICAL ENGINEERING



**BOMBARDIER**

**SAUER  
DANFOSS**

**ABB**

**ALSTOM**

## FOOD PROCESSING

**Cargill**

**Mondelēz  
International**

**McCain**

**bāma**

**Nestlé**

## CHEMICAL & PHARMA

**3M**



## BPO & SSC



**CREDIT SUISSE**



**Google**

**BNY MELLON**

**McKinsey&Company**

## IT & SD



**Capgemini**

**NOKIA**

**Atos**

**LUXOFT**

**OPERA  
software**



# GREAT CLIMATE FOR REINVESTMENTS



**3M**



**VIESSMANN**



**LG**

**WABCO**



**NOKIA**





BNY MELLON

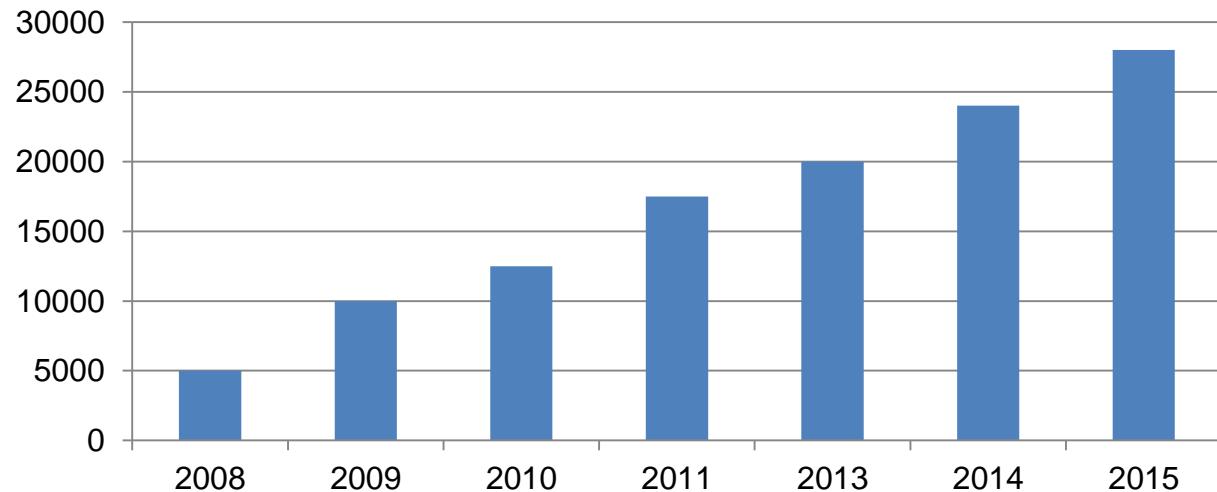


McKinsey&Company

- 27 700 employees in SSC/BPO sector
- 77 SSC/BPO centers in Wroclaw
- Average workforce in SSC/BPO = 360 pax

Source: HYAS Poland, 2015.

### Employment in SSC/BPO





Company	Origin	Processes
3M	USA	F&A
ACN	USA	BPO Contact Centre
Becton Dickinson	USA	HR
BNY Mellon	USA	F&A, FS
Catlin	UK	F&A
Credit Suisse	Switzerland	F&A, FS, HR, IT, LEGAL
Crisil Irevna	India	KPO
EY GSS	USA	F&A
Fresenius Kabi	Germany	F&A
Geoban	Spain	F&A
Google	USA	Marketing
HP	USA	BPO, F&A, KPO
IBM	USA	IT
McKinsey & Company	USA	KPO
Merck	Germany	HR
Qatar Airways	Qatar	Contact Centre
Qiagen	Germany	F&A
Parker Hannifin	USA	F&A
UBS	Switzerland	F&A, IT
UPS	USA	F&A
Volvo	Sweden	F&A, IT

Company	Origin	Headcount
Atos	France	200
Capgemini	France	650
Credit Suisse	Switzerland	1200
CSS	India	130
Diehl Controls	Germany	70
Dolby	USA	50
Espotel	Finland	60
IBM	USA	3500
Luxoft	Switzerland	500
Nokia Networks	Finland	2800
Objectivity	UK	400
Opera Software	Norway	200
QAD	USA	70
Redknee	Canada	200
Tieto	Finland/Sweden	400
Unit4 Teta	Holland	400
Viessmann	Germany	70
Volvo IT	Sweden	700
<b>TOTAL</b>		<b>11600</b>



Total office supply: 596.900 sqm

Vacancy rate: 8.6%

Available office space: 51.900 sqm

Prime rent A class: 13.5-14.5 EUR/month/sqm

Prime rent B/B+ class: 11.5-13.5 EUR/month/sqm

# WHY WHROCLAW?

ATTRACTIVE TO WORK,  
ENJOYABLE TO LIVE



Research conducted by  
**Invest in Wrocław** in 2014



High level of satisfaction on:

- Public safety
- Labour resources
- Language competencies
- Quality of Life

**One of top alternative city  
breaks in Europe – march 2015**

**theguardian**

*„A notable chunk of commenters recommended western Poland’s biggest city, which has seen a boom of cultural activity in recent years.”*



 **MERCER**

„Quality of Living Report”  
by  
Mercer Consulting Agency

**Wrocław 100th  
worldwide  
&  
selected emerging  
business centre**

for its  
strong talent pool  
and good infrastructure.



- **Things to do & places to stay**

Over 500 pubs & restaurants, 7 cinemas, 13 theatres, Opera House, 18 shopping centres, 45 hotels of 3\*, 4\* & 5\* standard

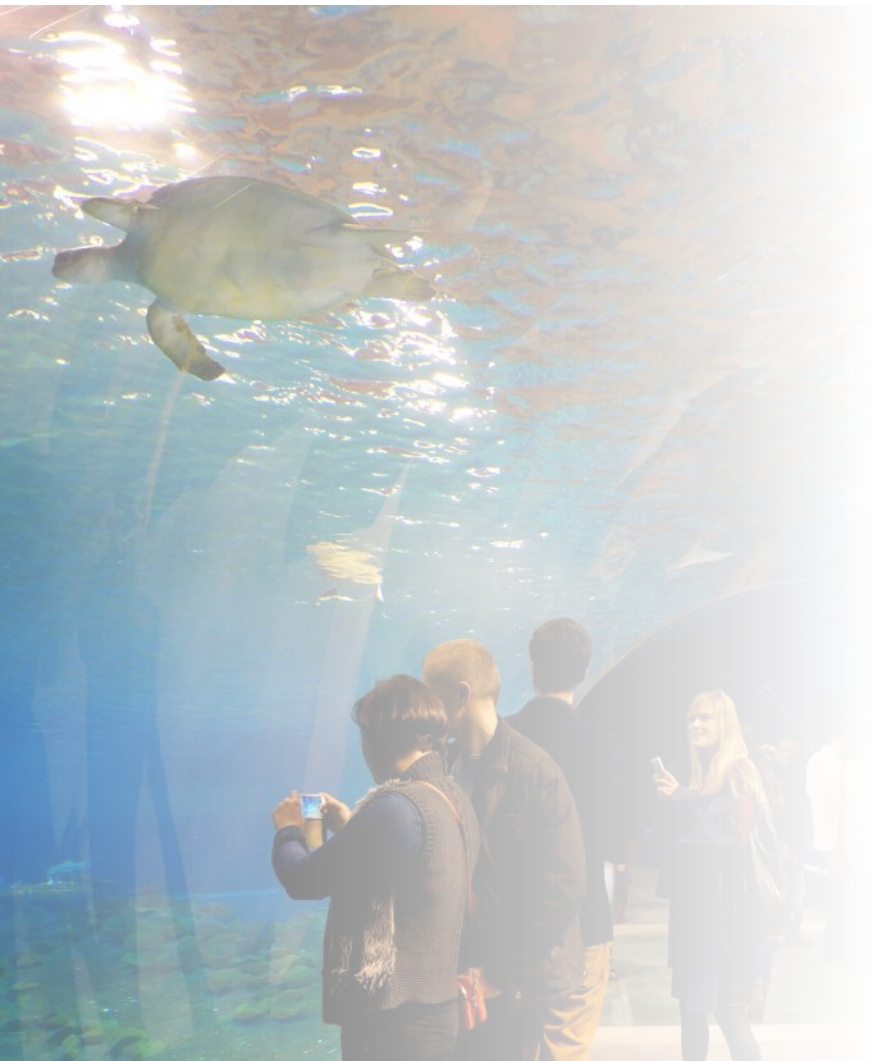
- **Housing**

65 developers, over 3.5k new apartments p.a., average price: 1450 eur/sqm, predominant size: 50-60 sqm with 2 bedrooms, most popular locations: S-W area of Wrocław

- **Healthcare**

Over 20 public hospitals and 50 public clinics, network of private healthcare centres: Luxmed, Medicover, Enel-Med, EMC Medical Institute, Polish Medical Holding PCZ





- **European Capital of Culture 2016**  
Year-long event of European art
- **World Games 2017**  
Festival of non-olympic sports
- **Euro Handball Poland 2016**  
Wroclaw as a host city
- **Christmas Market**  
The biggest and most magical in Poland
- **Wratislavia Cantans**  
International festival of cantata
- **Dialog Wroclaw**  
Renowed International Theatre Festival
- **T-Mobile New Horizons**  
International festival of independent cinema
- **Wroclaw Global Forum**  
International business and politics in Wroclaw



- **Rynek**  
Breathtaking old town square
- **Centennial Hall**  
UNESCO World Heritage Site
- **Africarium in Zoo Wrocław**  
Oceanarium of water ecosystems in Africa
- **Wrocław Stadium**  
Host of UEFA EURO 2012, seat capacity 44k
- **National Forum of Music**
- **Ostrow Tumski**  
„Cathedral Island” & city’s historical cradle
- **Partynice Racecourse**





# THANK YOU

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