

# Upper Silesia Good ground for investment



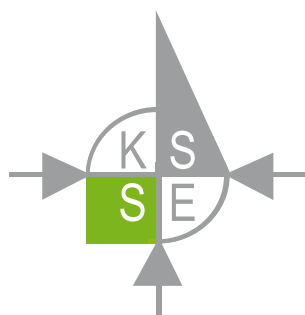
**This report is prepared by:**



Municipality of Katowice



Metropolitan Association of Upper Silesia



Katowice Special  
Economic Zone Co.

Katowice Special Economic Zone



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Dear Sirs,

For many years, the city of Katowice has been undergoing a visible transformation, and it now faces new challenges resulting from its taking on a new role, that of the leading city of the Silesia Metropolis. To meet these challenges, the city has launched the implementation of a few key projects, including an International Congress Center, relocation of the Silesian Museum and National Polish Radio Symphony Orchestra, the Katowice Technology Park and the Katowice Water Park.

We have initiated steps aimed at transforming the existing downtown space into a new, functional and people friendly environment. We are appreciative that the city is being recognized on the national investment map as a good location for many foreign investors. At the same time, we are acutely aware that without new investment, the planned pace of transformation may slow down.



Therefore, I am pleased to present you with the investment report prepared by our industry specialists, which provides an overall perspective and responds to questions, and which will help you make a sound decision regarding investment in the Silesia Metropolis.

With regards,

A handwritten signature in blue ink that reads "Piotr Uszok". The signature is written in a cursive, flowing style.

Piotr Uszok Katowice City Mayor  
Chairman of Metropolitan Association of Upper Silesia



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# Katowice - the heart of the Agglomeration

Katowice, with its 311.200 inhabitants, is the main city of the Silesian Province and of the Upper Silesian Agglomeration. The Agglomeration is the most important economic, academic and cultural center in southern Poland. The city of Katowice offers attractive opportunities to investors, including well-qualified work force, modern infrastructure and a convenient location at the crossroads of trans-European routes linking Poland with the Czech Republic, Slovakia, Germany and the Ukraine.

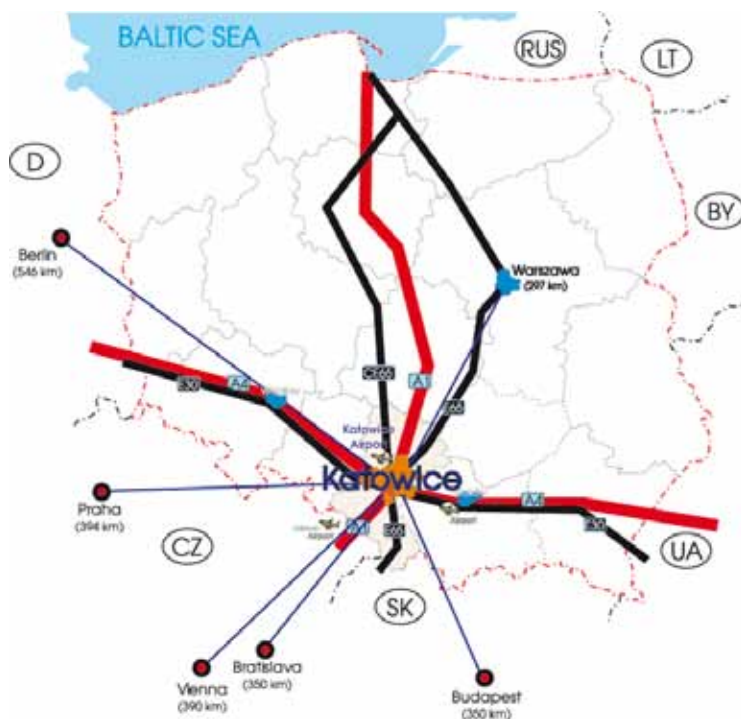
With its eye on future investment, Katowice is in the process of transforming the city into a major metropolitan center.

## Location

The region of Upper Silesia is located in southern Poland, relatively close to major European capitals, such as Budapest, Bratislava, Vienna, Prague, Berlin and Warsaw, at the cross-roads of trans-European transport corridors.

Trans-European Corridor III: Berlin - Wrocław - Katowice - Kraków - Lvov

Trans European Corridor IV: Gdańsk - Katowice - Żylna - Bratislava - Vienna



Crossing point of European transport corridors  
Source: archives of Katowice City Hall

## Metropolitan Association of Upper Silesia (GZM)

The Metropolitan Association of Upper Silesia is formed by 14 adjacent cities: Bytom, Chorzów, Dąbrowa Górnicza, Gliwice, Jaworzno, Katowice, Mysłowice, Piekary Śląskie, Ruda Śląska, Siemianowice Śląskie, Sosnowiec, Świętochłowice, Tychy and Zabrze. The GZM is located in the middle of the Upper Silesian conurbation, with 2 million inhabitants living in an area of 1218 sq km, which is the highest population density in Europe.

Fact sheet	Katowice	GZM
Inhabitants (thousand)	311.2	1,978.6
Area (square km)	165	1,218
Density (person per sq km)	1,886	1,624
Fitch ratings*	„A-“	n/a
Unemployment	2.1 %	7.7%
GDP / Poland GDP	3.0 %	8.3%

Source: Statistical Office, June 2008

\* for liabilities in foreign and domestic currency; stable outlook - 07 Nov 2008

## Natural resources

Coal, zinc, lead, methane, natural gas, marlstone and limestone.

## Industries

Coal mining (there are 60 coal mines in Silesia, whose output covers 91% of coal consumption in Poland, including Kompania Węglowa, the largest European coal producer), metallurgy, energy and fuel production, IT, automotive and food.

## Air connections

Katowice International Airport provides 34 international connections with Barcelona, Belfast, Brussels, Cologne, Dublin, Dusseldorf, Edinburgh, Eindhoven, Frankfurt, Liverpool, London, Milan, Munich, Paris, Rome, Stockholm and Warsaw, and offers 170 flights per week.

Katowice International Airport capacity	2006	2007	2008
Passenger transport (thousand)	1,458.4	1,995.9	2,426.9
Cargo transport (tons)	6,113	7,795	12,703

\* Source: GTL S.A. (Upper Silesian Aviation Group) – 2008  
More reference: <http://www.katowice-airport.com/en>

**Rail connections**

Katowice Railway Station provides 11 direct express connections with Berlin, Bratislava, Budapest, Hamburg, Kiev, Lvov, Minsk and Moscow.

**Asia rail connections**

The railway junction in Sławków allows cargo transport from Western Europe to the East by connecting two types of rails: European standard wide gauge with the Eastern standard narrow gauge.

**Shared Services Centers**

The Katowice region is one of more important shared services centers in Poland with such players as: Gallup Polska, Cap Gemini, Steria, Mentor Graphics, Kroll Ontrack, Calling Polska, Rockwell Automation and TNT.

**Foreign capital**

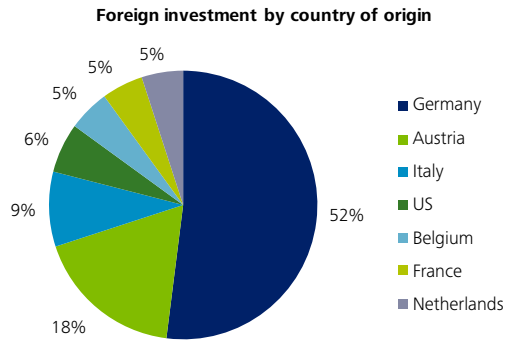
Investment incentives offered by the municipalities of the Upper Silesian Metropolis have attracted well-known companies from around the world: Arcelor, HP, Isuzu, NGK Ceramics, BOS Automotive, Brembo, Ficommirrors, Guhring, Hilton Foods, Kirchhoff, Lidl, Macro Molds, Mapei, Mecalux, Meiko, Rehau, Saia-Burges, Sandvik, Sest-Luve, Toyo Seal and TRW.

**Major investors from the U.S.**

Rockwell Automation, Delphi Automotive Systems, Johnson Controls, Lear Corp, Oasis East, Tenneco and General Motors.

**Industries represented**

Steel works, construction, automotive, industrial automation, plastics, food industry, metal industry, logistics, chemical and energy.



Source: Silesian Voivodship Office in Katowice

**During the last decade, foreign investment in Silesia exceeded EUR 4 billion, with about 80% of profits reinvested.**

Source: Silesian Voivodship Office in Katowice



Katowice – main road, railway arteries and air route  
Source: archives of Katowice City Hall

# Education

## Higher education

In the Upper Silesian Metropolis, 143,000 students attend 28 universities. The region offers a broad education base, in diverse areas and specializations. There are seven universities in the city of Katowice:

- University of Silesia
- Silesian University of Technology
- University of Economics
- Academy of Physical Education
- Medical University of Silesia
- Academy of Fine Arts
- Academy of Music

Every year Silesian universities provide the labor market with approximately 70,000 well-educated graduates who are attractive potential hires for local businesses.

## Most popular departments (thousand of students per academic year)

Economics & Administration	42.96 th.
Information Technology	9.85 th.
Technical	9.07 th.
Law	4.13 th.
Architecture	3.35 th.

Source: Metropolitan Association of Upper Silesia ,2008

## Foreign languages

According to recent surveys carried out by CEBOS, 1 the percentage of Poles who speak foreign languages is comparable to other EU countries and is growing. Approximately 45% of Poles speak at least one other language; 25% indicate English, 20% Russian, 12% German; a smaller percentage speaks Slovakian, Dutch, Spanish and other languages.

## Most popular languages (percentage of Silesian students learning a foreign language)

English	66%
German	25%
French	5%
Russian	3%

Source: TNS OBOP survey



Karol Szymanowski Music Academy in Katowice  
Source: archives of Katowice City Hall

Among young Poles and businessmen,  
English is the key communication tool.  
97% of students speak English.

Source: Randstadt, October 2008

# Labor market

## Population

Katowice has a population exceeding 300,000, while the Agglomeration as a whole has 2 million inhabitants and is the largest settlement of adjacent cities in Central Europe. Residents of the Silesian Province account for 12% of the entire population of Poland. 9 million people live within 100 km of Katowice.

### Average monthly remuneration (2007)

Katowice	PLN 3,727
Silesia	PLN 3,189
Poland	PLN 2,672

### Average monthly remuneration by position (2006)

Manager	EUR 1,900
IT Specialist	EUR 750
Accountant	EUR 450

Source: GZM statistical data 2006-2007

## Demographics

Over 66% of the population is of working age, with 58% under 45, which (considering the low unemployment rate of 8.9%) makes for a relatively young and productive society. The Silesian population is dominated by females (52%).

## Cost of labor

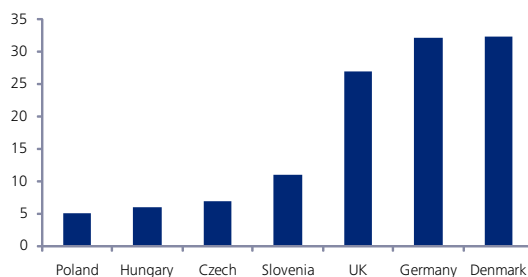
The cost of labor has increased slightly during the most recent years of dynamic business development in the region. Nevertheless, salary growth in Poland is slower than in other Central European countries and remains competitive as compared to salaries offered in Western Europe.

### Average monthly gross remuneration by industry (2008)

General	EUR 1,005
Industry	EUR 1,127
Construction	EUR 822
Trade and services	EUR 748
Leisure (HoReCa)	EUR 421
Transport & storage	EUR 691
Real estate services	EUR 663

Source: Central Statistical Office, Bank of Regional Data 2008

## Eastern compared to Western Europe labour cost per hour in private sector in EUR



Source: Eurostat, 2007

### Average gross monthly remuneration (September 2009, US\$)

Enterprise sector	1,625
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Average gross monthly IT sector remuneration by position and experience

	experience	US\$
Senior Software Engineer Specialist	5+	3,600-4,500
Software Engineer Specialist	2-4	2,000-3,300
Software Engineer Programmer	1-3	1,200-2,000

Source: GZM statistical data 2009

Well-educated Polish graduates begin their careers with salaries five times lower than in Germany for comparable positions.

Source: Eurostat, 2007

# Average monthly gross remuneration in various organizational units

## Average gross monthly remuneration in SSC

(gross/ month / PLN)

	Entry level	Clerk	Team Leader
English	2,400	3,300	4,300
German, French	2,700	3,600	6,500
Italian, Spanish, Czech, Slovak	3,000	3,950	7,000
Portuguese, Greek, Dutch, Romanian	3,400	4,200	7,000

Source: Hays 2009

## Average gross monthly remuneration in Accountancy & Finance

(gross/ month / PLN)

	average	min	max
CFO / Board Member	40,000	30,000	70,000
Finance Manager	15,000	10,000	20,000
Finance Controller	12,000	9,000	15,000
Financial Analyst	6,500	4,500	10,000
Internal Auditor	9,000	6,500	12,000
Accountant	3,500	2,500	5,000
Independent Accountant	5,500	4,000	7,000
Deputy Chief Accountant	8,500	7,000	10,000
Chief Accountant	12,000	9,000	15,000
Tax Manager	21,000	16,000	25,000
Tax Specialist	9,000	6,000	13,000
Leasing Specialist	4,500	3,000	7,000
Sales Support Specialist	4,000	3,500	6,000
Credit Analyst	4,500	4,000	5,000
Claims Specialist	5,500	4,000	10,500
Investment Analyst	6,000	4,000	8,000
In-house Lawyer	13,000	10,000	15,000
Head of Legal Dept.	24,300	22,000	35,000
Junior Lawyer	5,000	3,000	7,500
Lawyer	10,000	8,500	13,000
Senior Lawyer	25,000	17,000	35,000

Source: Hays 2009

## Average gross monthly remuneration in IT

(gross/ month / PLN)

	average	min	max
Java Developer	5,500	3,000	10,000
C++ Developer	4,500	3,000	8,000
NET Developer	5,000	3,000	9,000
SQL Developer	4,500	3,000	8,000
Systems Administrator	5,000	3,000	1,000
Database Administrator	5,000	3,000	9,000
Network Administrator	4,000	3,000	7,500
Systems Analyst	5,500	3,500	10,000
IT Business Analyst	6,000	4,000	10,000
Project Manager	7,000	5,500	14,000
Cisco Engineer	6,000	3,000	10,000
IT Manager/Director	9,000	5,500	22,000
SAP Consultant	11,000	6,000	25,000
WEB Designer	4,000	2,000	8,000
Sales Support Consultant	5,500	4,000	10,000
Sales Specialist (base salary + commission)	5,000	3,000	22,000

Source: Hays 2009

## Average gross monthly remuneration in Manufacturing

(gross/ month / PLN)

	average	min	max
Production Manager/Director	15,000	9,000	25,000
Quality Manager/Director	14,000	10,000	20,000
Maintenance Manager	12,000	8,000	15,000
Logistics Manager	12,000	8,000	18,000
Project Manager	9,000	8,000	12,000
HR Manager/Director	13,000	10,000	25,000
Shift Leader	8,000	6,000	9,000
Quality Engineer	6,000	4,000	8,000
Process Engineer	6,000	3,500	7,000
Logistics Specialist	5,000	4,500	6,000
Buyer	6,000	4,500	9,000
Purchasing Manager	12,000	9,000	16,000

Source: Hays 2009

### Average gross monthly remuneration in Construction & Property (gross/ month / PLN)

	min	max
Site Supervisor	4,500	8,000
Site Engineer	4,000	8,000
Site Manager	6,000	12,000
Project Manager	11,000	25,000
Quantity Surveyor	6,000	12,000
Technical Director	10,000	20,000

Source: Hays 2009

### Average gross monthly remuneration in Sales & Marketing (gross/ month / PLN)

	average	min	max
Sales Representative	4,300 + commission	2,500 + commission	6,000 + commission
Account Manager / Senior Key Account Manager	8,500 + commission	7,000 + commission	10,000 + commission
Area Sales Manager	8,500 + commission	7,000 + commission	10,000 + commission
Export Manager	10,000	8,000	13,000
Sales Director	15,500	11,000	20,000
Sales Analyst	4,200	3,500	5,000
Trade Marketing Manager	12,000	10,000	14,000
Trade Marketing Specialist	6,700	5,000	8,000
Marketing Specialist	4,500	3,000	6,000
Junior Brand Manager	7,000	6,000	8,000
Brand Manager	10,000	6,000	15,000
Marketing Manager	20,000	15,000	25,000
Transport Manager	8,000	6,000	12,000
Forwarding Manager	8,000	6,000	10,000
Distribution Center Manager	13,000	10,000	16,000

Source: Hays 2009

# Katowice Office Market

The office market in Katowice is still immature, especially as compared to Kraków or Wrocław. However, the market is developing and therefore we assume that as the current projects are implemented, the Katowice office market will become mature within three years, with the demand and interest in leasing top quality office space increasing significantly.

## Office Stock

Currently, the Katowice office market share in total office space in the six largest regional cities is 13%. At the end of H1 2009, the total modern office space exceeded 203,100 m<sup>2</sup>. The main office locations in Katowice are concentrated in the area surrounding Rondo Gen. Ziętka along ul. Chorzowska (City Centre). Another popular office district is Dolina Trzech Stawów near the A4 motorway.

### Office space availability in Katowice (square meters)

1H 2009	203,100
Expected by 2010	266,400
Forecasted by 2011	374,700

#### Examples of available office buildings

Chorzowska 50      13 floors      17,500 m<sup>2</sup>.

+ air-conditioning, 24/7 monitoring and central reception, conference center for 100 people, 660 parking lots, bank, medical center, gallery, winery, laundry

Altus Tower      29 floors      13,200 m<sup>2</sup>.

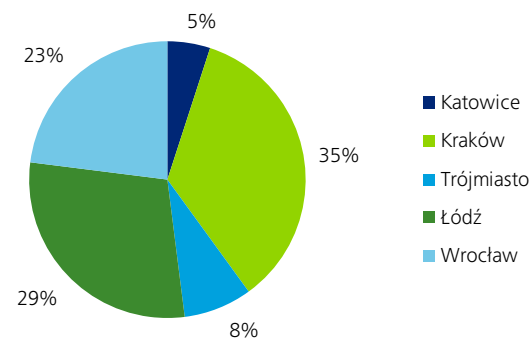
+ air-conditioning, 24/7 monitoring and central reception, conference center for 400 people, 660 parking lots, bank, medical center, winery, laundry, restaurant, car wash, 4 star hotel, cinema, shopping mall

Source: King Sturge 2009

## Office Supply

New office space in 2008 reached ca 20,000 m<sup>2</sup>, which included mainly Green Park and the final stage of the Euro Centrum project, which provide B/B+ class office space. The supply in 2009 is predicted to reach 26,400 m<sup>2</sup>, and 42,900 m<sup>2</sup> in 2010. Since the end of 2008 and throughout 2009, there has been an increase in activity in the real estate market, which has resulted in new, A-class office projects being developed in Katowice - including buildings such as the Atrium, Katowice Business Point, Centrum Biurowe Francuska, Reinhold Center and Euro-Centrum.

### New supply by city H1 2009



Source: King Sturge 2009

We assume that phased projects that are capable of providing more than 10,000 m<sup>2</sup> of new office space and whose completion date falls in 2011 may expect to become beneficiaries of the market turnaround, since demand is predicted to increase, surpassing the level of supply.



Katowice Business Point  
Source: King Sturge 2009

Currently, the number of projects in the construction phase has led to a "tenant favourable" market, with many incentives offered to tenants. This is also driven by pressure on developers by finance banks, which require developers to secure certain lease thresholds during or even before construction commences.

### Major office schemes under construction in Katowice

Scheme	Developer	GLA m <sup>2</sup>	Delivery date
Atrium	Arkad Invest	11,800	Q3 2009
Reinhold Center	Reinhold Polska	44,000 (8,635 - I phase)	Q4 2009 – I phase
Centrum Biurowe Francuska	GTC	21,500 (11,000 - Building A, 10,500 - Building B)	Q1 2010 – I phase, 2010/2011 – II phase
Katowice Business Point	Ghelamco	17,500	Q2 2010
Brynów Center	Holdimex	5,200	Q4 2010
Silesia Towers	Trigranit	76,200 (21,500 - I phase, 54,700 - II phase)	Q1 2011 – I phase, Q4 2012 – II phase
Silesia Business Park	Skanska	41,000 (20,000 - I phase)	To be confirmed

Source: King Sturge 2009

### Vacancy rate

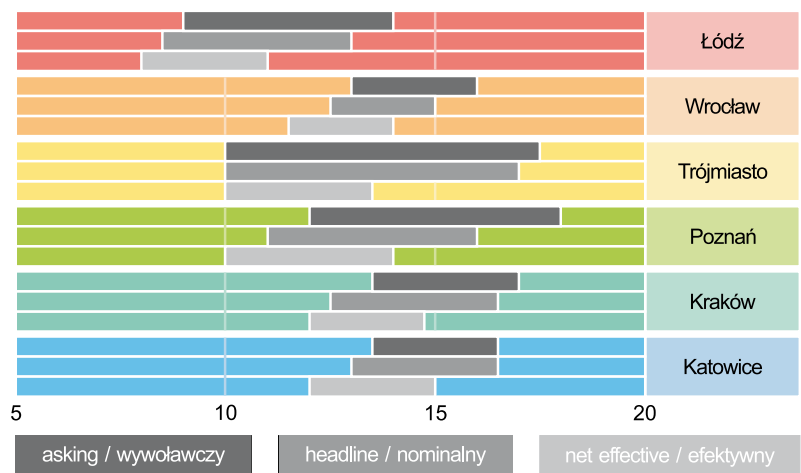
Vacancy rate in Katowice at the end of H1 2009 reached 7.5%, which is higher by over 5.0% than six months earlier at the end of 2008. It is forecasted that the amount of available office space will increase in 2010 with the completion of a number of office projects.

### Rents

The lease agreement provisions for many buildings in Katowice are different than in more mature markets. Headline rents in Katowice at the end of H1 2009 stood at EUR 10 - EUR 13/m<sup>2</sup>/month for a B/B- class office building and EUR 15 - EUR 16/m<sup>2</sup>/month for an A-class building. A service charge of EUR 1.50 - EUR 4.00/m<sup>2</sup> is often included in rent, particularly in older buildings. Rent for new A-class offices is usually denominated in Euro, but in older buildings Polish Zlotys is still being applied. It is possible that headline rents will further decrease by EUR 1 - EUR 2/m<sup>2</sup>/month in the next few months. With lower demand and a higher vacancy rate caused by the current economic downturn, landlords are willing to grant more incentives than nine months

ago. This has provided tenants with a negotiating advantage, allowing them to sign long-term leases at levels significantly below healthy market levels. Extensive fit-out budgets financed by landlords have become the norm. Rent-free periods are the most popular part of incentives and can range from 3 to even more than 12 months on a 5-year lease term for large office requirements.

### Rent Abacus - Regional Cities Liczydło czynszowe - Miasta regionalne



Rent abacus  
Source: King Sturge 2009

### Summary

Office market in Katowice has great potential and should be developing in the future at a higher pace than other, more mature regional cities. The size of the population within the Silesian Voivodship speaks for itself. With excellent transport links, i.e. the best in-country road network, the second largest railway station and the quickly expanding Pyrzowice airport and huge labour force, the region has all of the ingredients to become successful when the market turns into growth again, which is already happening - and the first beneficiary of that growth should be Katowice, the capital of the region.

# Benefits of investment

“Poland’s economy is healthier than other economies in the region and seems less vulnerable to the global economic crisis. The IMF projects a mild recession in 2009 and a slow recovery in 2010.”

## Foreign capital in Poland

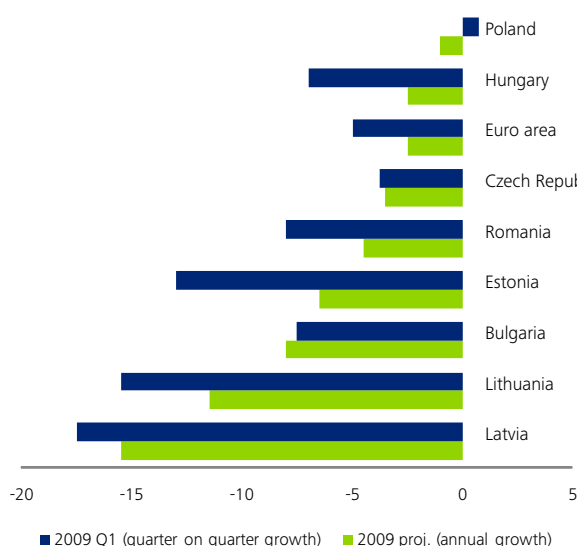
Poland was very successful in attracting foreign direct investment (FDI) in the 1990s. Its market size, membership in the OECD (1996) and NATO (1999), as well as its recent membership in the European Union (May 2004), have made it attractive to foreign investors. Cumulative FDI inflows reached USD 84.5bn in 1993–2004, according to the Polish Agency for Information and Foreign Investment (PAIIZ). In 2007, FDI amounted to USD 8.2bn, which is just a bit less than the previous year. FDI peaked in 2000 at USD 10.6bn, mainly on the back of large privatizations.

## Investment attractiveness rankings

AT Kearney – FDI Confidence Index Report	Poland was ranked 22	2007
Institute of Market Economy Research “Investment attractiveness of Voivodeships and Sub-regions in Poland	Silesia ranked no 1	2007
The Global Competitiveness Report 2009-2010, The World Economic Forum in Davos	In the overall rating Poland was ranked 46	2009

Source: DTZ 2009

## Standing out



Sources: National Statistical Institutes, Eurostat, IMF World Economic Outlook database.

## Economic projections

Due to a flexible exchange rate, a credit facility granted by the International Monetary Fund (IMF) and sound economic policies that helped to avoid large external and internal imbalances, Poland's growth remained positive in Q4 2008 and Q1 2009. According to the IMF, Poland's 2008 GDP growth at 4.8% will be followed by -0.5% in 2009 and 1.0% in 2010.

## Investment incentives

Enterprises that invest or expand their activities in Poland may apply for various types of tax and non-tax investment incentives, such as tax exemptions, investment grants, training grants, etc. Support comes from both domestic and EU sources. Investment incentives constitute aid that is non-refundable and free of additional costs. Grants are credited to the investors' account after the investment is completed.

## EU funded aid

In the programming period 2007-2013, Poland is a major beneficiary of EU funds. The budget set for support for investments conducted by enterprises is several times higher than allocation for previous years (2004 - 2006), and amounts to EUR 67 billion. Therefore, investors will have more opportunities to successfully apply for financial support.

## Types of investment supported by EU funds

Innovative investment	Investments aimed at establishing an enterprise, its development, production diversification or implementation of a fundamental change in the overall production process, together with the use of innovative technological solutions
Training	Employee training, including e-learning and post-graduate studies (also MBA), and related HR advisory support
Research & Development	Investments consisting of two phases: - R&D and implementation of research results, - investments in R&D activity development (establishing Research & Development center, development of industrial design)
Environment protection	Investment aimed to help enterprises to comply with environmental protection standards, producing energy from renewable sources and bio-fuel production
Service centers	Investment in the modern services sector (Shared Service Centers, IT and R&D centers)
Technological and industrial parks	Building/construction and development of technological and industrial parks
Food processing	Investment in food processing plants, including distribution centers

Source: IMF, July 2009



# Katowice Special Economic Zone

The Katowice Special Economic Zone (KSSE) is a part of the Polish Systems of Economic Zones established by the Council of Ministers. It was created in 1996 for a period of 20 years (until 8 August 2016, but in 2009 the period was extended until 31 December 2020) to support and accelerate the transformation of obsolete Silesian industries and to create new jobs. KSSE is the largest of the 14 economic zones in Poland ranked by number of operating companies (16% of all Polish businesses), invested capital (over 25% of capital expenditure in all zones) and jobs created (over 22%). Thus far, the KSSE has attracted more than 190 companies that currently employ more than 40,000 workers.

The tax relief amount depending on the number of new jobs created can reach up to 40% of two-year labour costs of the new jobs for large enterprises, and 50% and 60% for medium and small-size enterprises, respectively.

The KSSE also has areas in małopolskie and opolskie voivodeships where the tax relief based on investments costs of two-year labour costs can amount to 70% (for small enterprises, and 50% and 60% for large and medium-size enterprises, respectively).

Businesses operating in the zone are guaranteed a corporate income tax exemption of 40% to 70%, and may be granted an exemption from RET. Employees of the KSSE (zone managing enterprise) help investors acquire land and buildings and offer training opportunities and consulting support. Rental opportunities (office and warehouse space) also are available.

## SEZ fact sheet

Number of SEZ in Poland	14	KSSE
Permits for investors	1,196	198
Amounts invested (PLN billion)	56.7	15.2
Jobs created	156,036	40,616
Area (hectares)	12,209.4	1,544

Source: Deloitte report on SEZ, May 2009, [www.ksse.com.pl](http://www.ksse.com.pl)

The Zone is divided into four subzones: Gliwicka, Jastrzębsko - Źorska, Sosnowiecko- Dąbrowska and Tyska, out of which an area of 21,3295 ha has been absorbed by the City of Katowice.

Polish legal regulations allow the establishment of a new location for investors if at least 250 jobs are created or PLN 115 million (approximately EUR 40 million) is invested in regions whose unemployment rate is below the national average, with less restrictive requirements for regions with an unemployment rate exceeding the national average.

SEZs are designed mainly for manufacturing businesses and selected high-tech companies. However, in recent years, the KSSE has attracted investors from the BPO and R&D sectors and is looking to develop further in this direction.

The most important investments in the SEZ include GM Opel, Fiat - GM Powertrain, Guardian, NGK Ceramics, Isuzu Motors, Delphi and Brembo.

### Investment incentives in the SEZ

The tax relief amount -- depending upon the invested funds -- can amount to up to 40% (for large enterprises), 50% and 60% (for medium and small enterprises, respectively) of investment costs.

## Main investors in the KSSE

AUTOMOTIVE LIGHTING Polska Sp. z o.o.
COOPER-STANDARD AUTOMOTIVE Polska Sp. z o.o.
DELPHI POLSKA AUTOMOTIVE SYSTEM Sp. z o.o.
GENERAL MOTORS MANUFACTURING Poland Sp. z o.o.
FIAT-GM POWERTRAIN Polska Sp. z o.o.
NGK CERAMICS Polska Sp. z o.o.
ISUZU MOTORS Sp. z o.o.
GUARDIAN INDUSTRIES Poland Sp. z o.o.
BREMBO Polska Sp. z o.o.
DELPHI POLSKA AUTOMOTIVE SYSTEMS Sp. z o.o.
GÜHRING Polska Sp. z o.o.
HENKEL Polska Sp. o.o.
KIRCHHOFF POLSKA ASSEMBLY Sp. z o.o.
MAGNETI MARELLI EXHAUST SYSTEMS Polska Sp. z o.o.
MAGNETI MARELLI SUSPENSION SYSTEMS BIELSKO Sp. z o.o.
MECACONTROL Polska Sp. z o.o.
MEIKO TRANS Polska Sp. z o.o.
MÜLLER-DIE LILA LOGISTIK Sp. Z o.o.
ROCA Polska Sp. z o.o.
MAPEI POLSKA Sp. z o.o.
ROCKWELL AUTOMATION Sp. z o.o.
TENNECO AUTOMOTIVE EASTERN EUROPE Sp. z o.o.
TRW BRAKING SYSTEMS Polska Sp. z o.o.
TRW Polska Sp. z o.o.
VLASSENROOT Polska Sp. z o.o.

Source: [www.ksse.com.pl](http://www.ksse.com.pl)

# Examples of successful investments in the Katowice region

## Mentor Graphics

is a technology leader in electronic design automation (EDA), providing software and hardware design solutions that enable companies to develop better electronic products faster and at a lower cost.

The company offers innovative products and solutions that help engineers overcome design challenges they face in the increasingly complex world of board and chip design.

The Polish office in Katowice is the largest Mentor's R&D site in Europe.

## DisplayLink

has reinvented the way computers talk to multiple displays through the use of semiconductors and software.

DisplayLink is a privately held company with venture funding from Atlas Venture, Balderton Capital, Benchmark, DAG Ventures and DFJ Esprit Capital. The company has opened its R&D center in Katowice attracted by proximity of a number of universities and the quality of Polish engineers.

## Kroll Ontrack

Is a provider of large-scale electronic and paper-based discovery and computer forensics services and software to help attorneys, investigators, corporations and legal professionals quickly, efficiently and cost-effectively recover, review, manage, and produce information and documents.

***"Since the beginning of our presence in 2001, the cooperation with the Town Council has been perfect. Always open to the developing IT market, they allowed Kroll Ontrack realize business objectives related to creating innovative solutions. In crucial projects we can count on the understanding and support from the Mayor and his staff."***

*Marek Suczuk, Managing Director of Kroll Ontrack Poland*

Kroll Ontrack is the Polish subsidiary of Kroll Ontrack Inc. The office in Katowice has the largest computer forensics laboratory in Central Europe as well as the largest Kroll Ontrack software R&D development facility outside the U.S.

## Rockwell Automation

is a leading global provider of industrial automation power, control and information systems and services that help manufacturers achieve a competitive advantage in their industries.

It is anticipated that the Rockwell Automation facility in Katowice will create up to 220 additional jobs over the next two years, as Katowice becomes the support hub for the company's growing central and Eastern European manufacturing automation business. As well as a shared services center for administration, the facility also houses a software R&D facility - a global center of excellence.

***"People are our key value in Rockwell Automation. Based on our experience, the quality of human resources in Katowice is very high. Thanks to our team, we have achieved a competitive advantage, at the same time confirming validity of our decisions and key business objectives. Easy access to the local airport and an efficient transport system allow efficient management of our supply chain."***  
***Sławomir Szpak.***

*General Manager of Rockwell Automation in Katowice*

Rockwell Automation has been operating in Katowice since May 2006 and currently employs 373 individuals.

## Capgemini

Is one of world's biggest consulting technology and outsourcing companies, employing over 80,000 people worldwide.

In 2006, Capgemini Group revenues reached EUR 8.7 billion. The Group has over 300 centers and offices in 30 countries and is the largest consultancy business in Europe.

Capgemini Polska Outsourcing Center in Krakow and Katowice serves over 70 global clients. The Katowice Center employs over 700 F&A and IT specialists.

# Vision for the future

## Future projects

The city is seeking new opportunities to develop both business and civil aspects of the city structure. In this context, several major "public space" improvement projects are underway.

## Downtown transformation

Redevelopment of the downtown area of 150 hectares will be the largest project of this type in Central Europe. The core 28 hectares will house mixed use facilities offering 735,000 sq.m. of space for offices, apartments, retail, services and public space development.

## International Congress Center

Following the liquidation of coal mines located in the downtown area, the city authorities decided to transform the area into a large facility designed for congresses, conferences, fairs and similar events. The objective of the investment is to broaden the business offering and create new public space adapted to the needs of a modern society.

## Modernization of the Railway Station

The city has decided to completely rebuild the old railway station to provide transport services of appropriate quality. The investor will construct a new modern building housing the railway station, the bus station, a trade and service mall and public services.

## Underground parking facilities

Over a 24-hour period, 65,000 cars park in the downtown area. A study carried out by the city identified 13,000 existing parking spaces, much less than actually needed (approximately 20,660). In the years 2009-2012, two underground parking facilities will be constructed in PPP scheme to house some 1,200 cars. This will improve traffic management during large events, such as Volleyball World League.

## Water Park

The project is located 2.2 km away from the railway station and involves the construction of a recreation, sport and leisure center with indoor and outdoor swimming pools, spa facilities, entertainment and commercial zone, hotels, outdoor sport infrastructure and a car park.

## Technology Park in Katowice

The mission of the Technology Park is to increase development of Katowice as one of the leading urban centers in the country by attracting innovative investors and ensuring optimum support for the development of advanced technologies and organizational solutions

by offering customized services and cooperation with science circles. The Park is to be situated on a 39.6 hectare site. The R&D and technology sectors will be supported by infrastructure comprised of hotels, catering, establishments, recreational amenities, administration as well as other business services. Phase 1 of the Technology Park development will commence in the first half of 2010, with announcement of the tender for the sale of the first plot of 12 hectares.



Downtown transformation  
Source: archives of Katowice City Hall



New Railway Station  
Source: archives of Katowice City Hall



International Congress Center  
Source: archives of Katowice City Hall

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