
**Silesian Investor
and Exporter
Service Center**



inSilesia

Foreword

The Silesian Voivodeship is successfully navigating the challenges related to the economic transformation, and consequently belongs to the most dynamically developing regions in Poland.

For decades, heavy industry was the core of the regional economy: this is what gave the region its strength and tradition, however, its current transition requires the support of smart specialisations such as medicine, ICT, energy industry, green economy, and emerging industries. There are over 480 thousand businesses operating in the voivodeship. The number of foreign investments is growing constantly. Over 400 businesses operate in the Katowice Special Economic Zone, they have invested a total of nearly PLN 36 billion and created over 80 thousand jobs. The presence of foreign companies created an opportunity for regional businesses to acquire new competences, implement state-of-the-art technologies, and become part of international supply chains.

The ambition of the voivodeship authorities is to build a region with a diverse, modern economic structure, relying on innovation and creativity of enterprises. Our task is to create the right conditions for them to invest, develop their competences and establish business relations. This is why the main objective of the development policy is to strengthen the role of the Silesian Voivodeship's economy in international value chains. We want to focus on promoting entrepreneurship, maintaining the investment attractiveness of the region, and support the internationalisation of the business activity conducted by enterprises. In this area, projects co-financed by the European Union are carried out in order to achieve these objectives, involving among other things: organising the participation of SMEs in trade fairs and economic missions, co-organisation of international congresses, and actively contributing to the improvement of the region's appeal for investors.

The Silesian Voivodeship has also been developing interregional cooperation with foreign partners. Particularly active and valuable exchange of experiences concerns aspects related to economic and social transformation, which the key partner regions of our voivodeship have already successfully implemented.

**Jakub Chełstowski
MARSHAL
OF THE SILESIA VOIVODESHIP**





Region

4

subregions

36

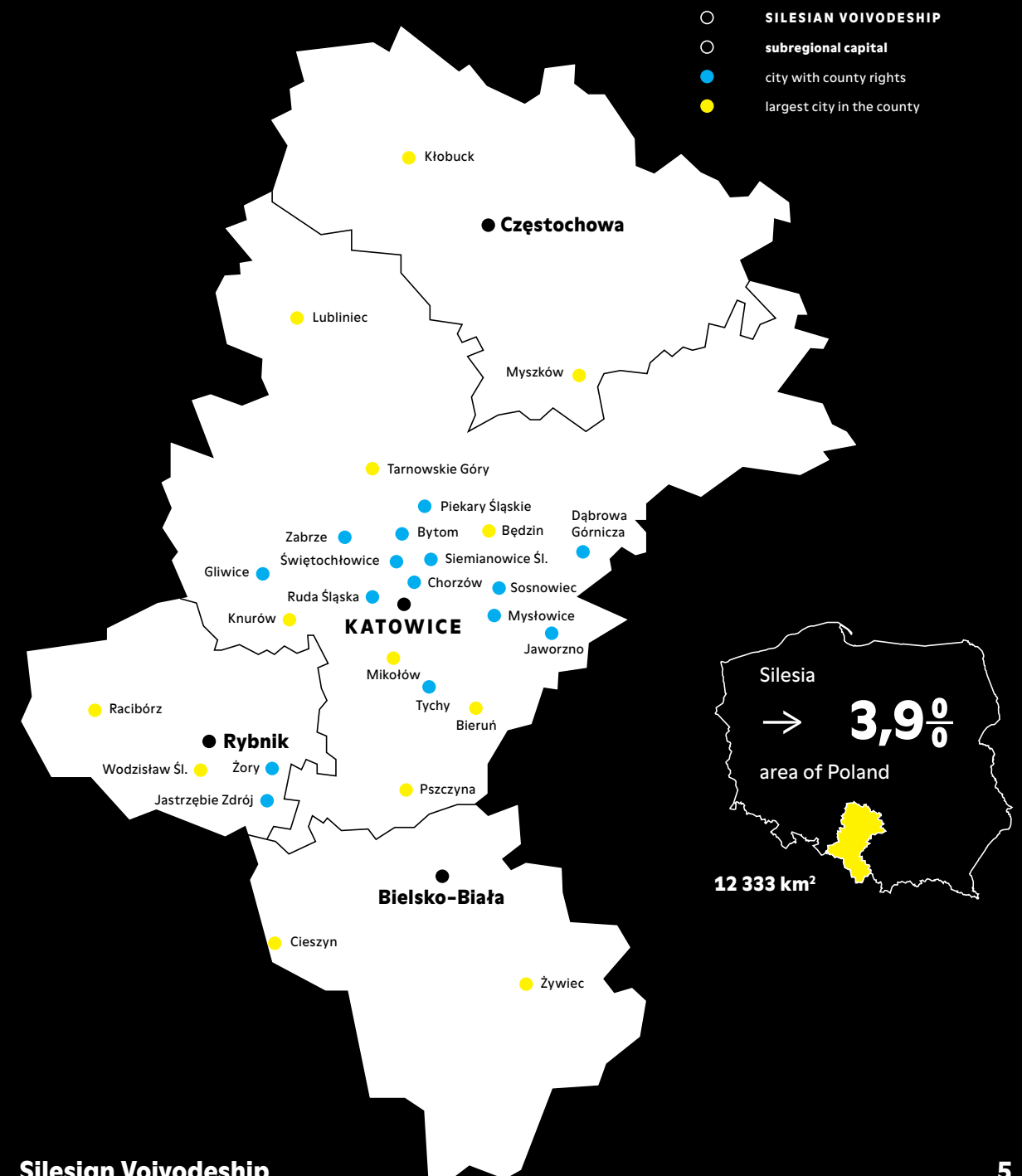
counties and cities with county rights

167

municipalities/communes

12 333

km² area

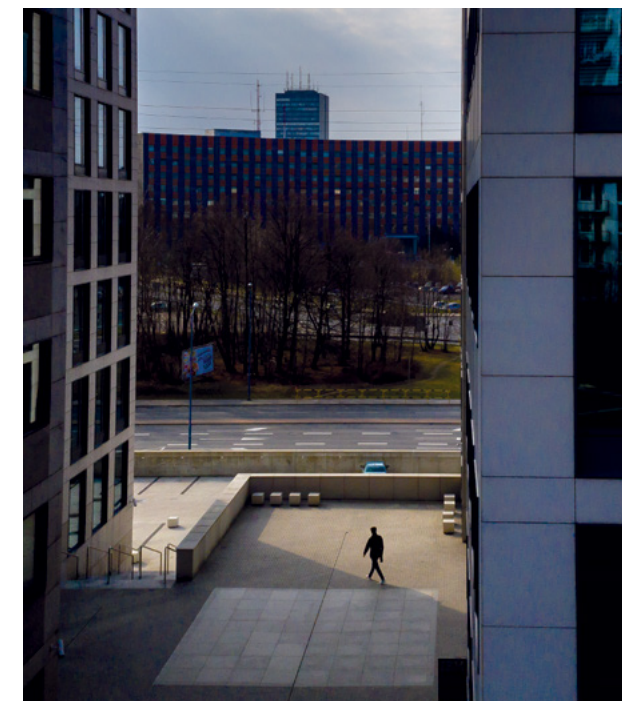
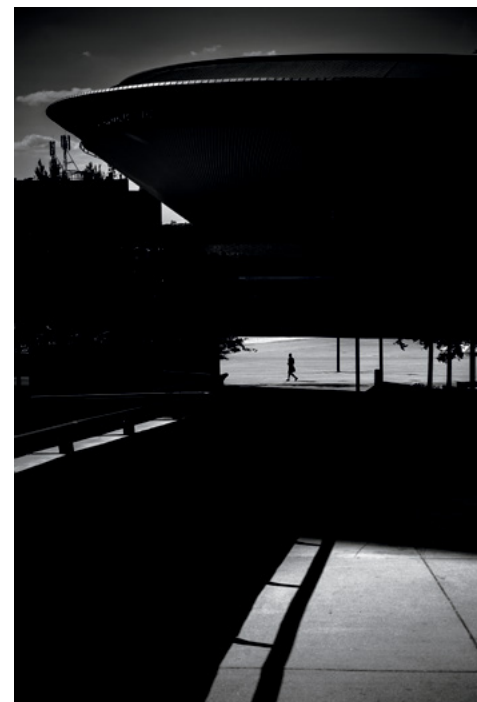




In a nutshell

Poland's strongest region in terms of the economy, with the best transport accessibility, a well developed infrastructure, as well as rich traditions and culture, all of which make the Silesian Voivodeship attractive for business. Many companies, not only Polish, but also ones with foreign capital, have found the Silesian Voivodeship to be an excellent space for development, and a region with potential in which it is worth investing.

Witold Bańka
SILESIAŃSKI VOJEWÓDZTWA
BRAND AMBASSADOR,
PRESIDENT OF THE WORLD
ANTI-DOPING AGENCY



In a nutshell

- **most attractive region for investments in Poland**
- **second most populous region in Poland**
- **one of the largest selling markets in Poland**
- **most developed transport infrastructure in Poland**

DEMOGRAPHY

Over **4.5 million people**, i.e. over 12% of the total population of Poland, live in an area accounting for just under 4% of the country. 8.5 million people live within a radius of 100 km from Katowice.

The Silesian Voivodeship is one of the most **urbanised areas** in Central and Eastern Europe.

It is also the region with the highest urban population share (**almost 77%**).

A REGION OF MANY CHANGES

New sectors and services have developed on the foundations of the economic transformations (automotive, ICT, processing, food, chemical, modern material technologies, financial, IT and customer support services).

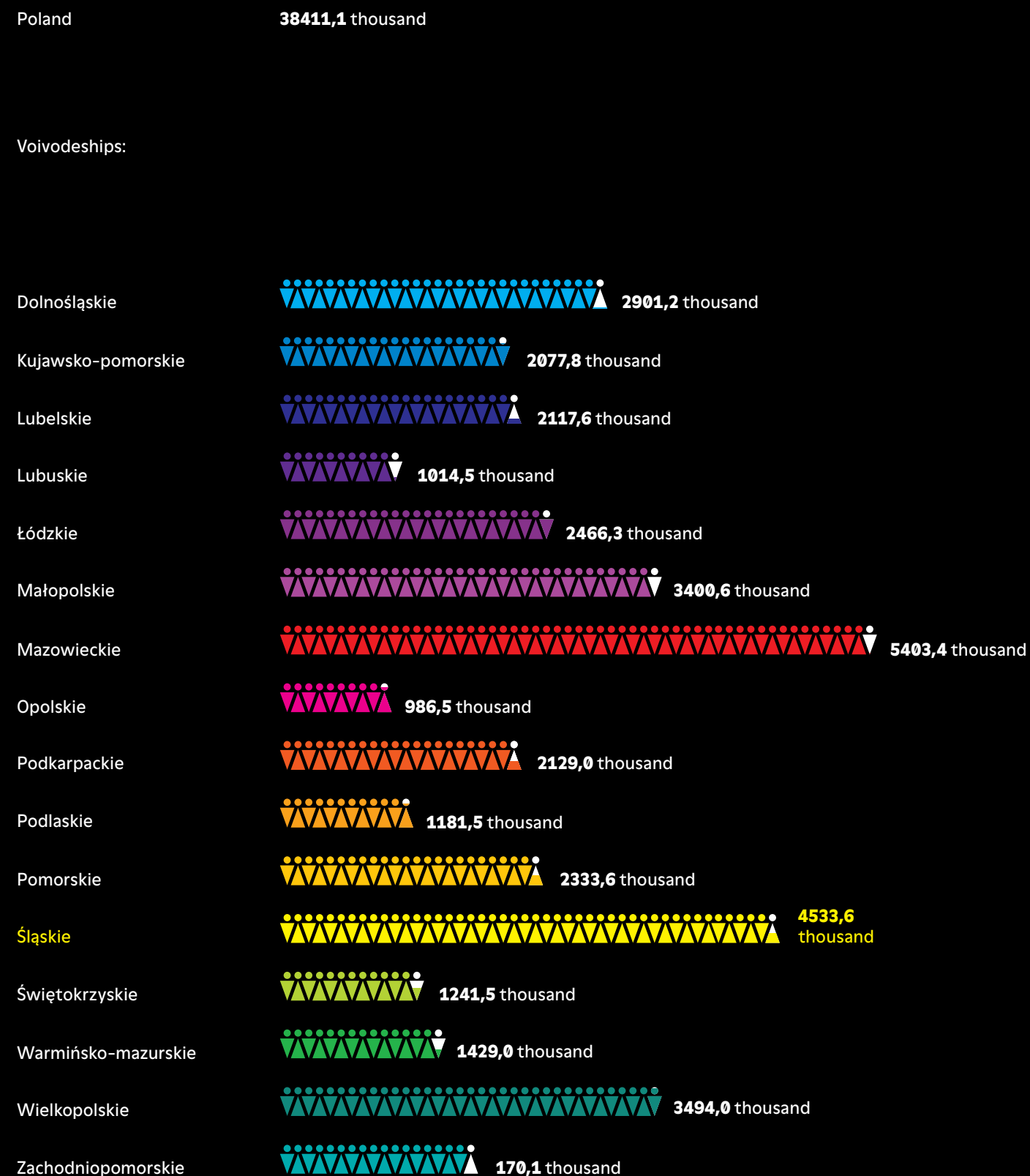
INDUSTRIAL TRADITION

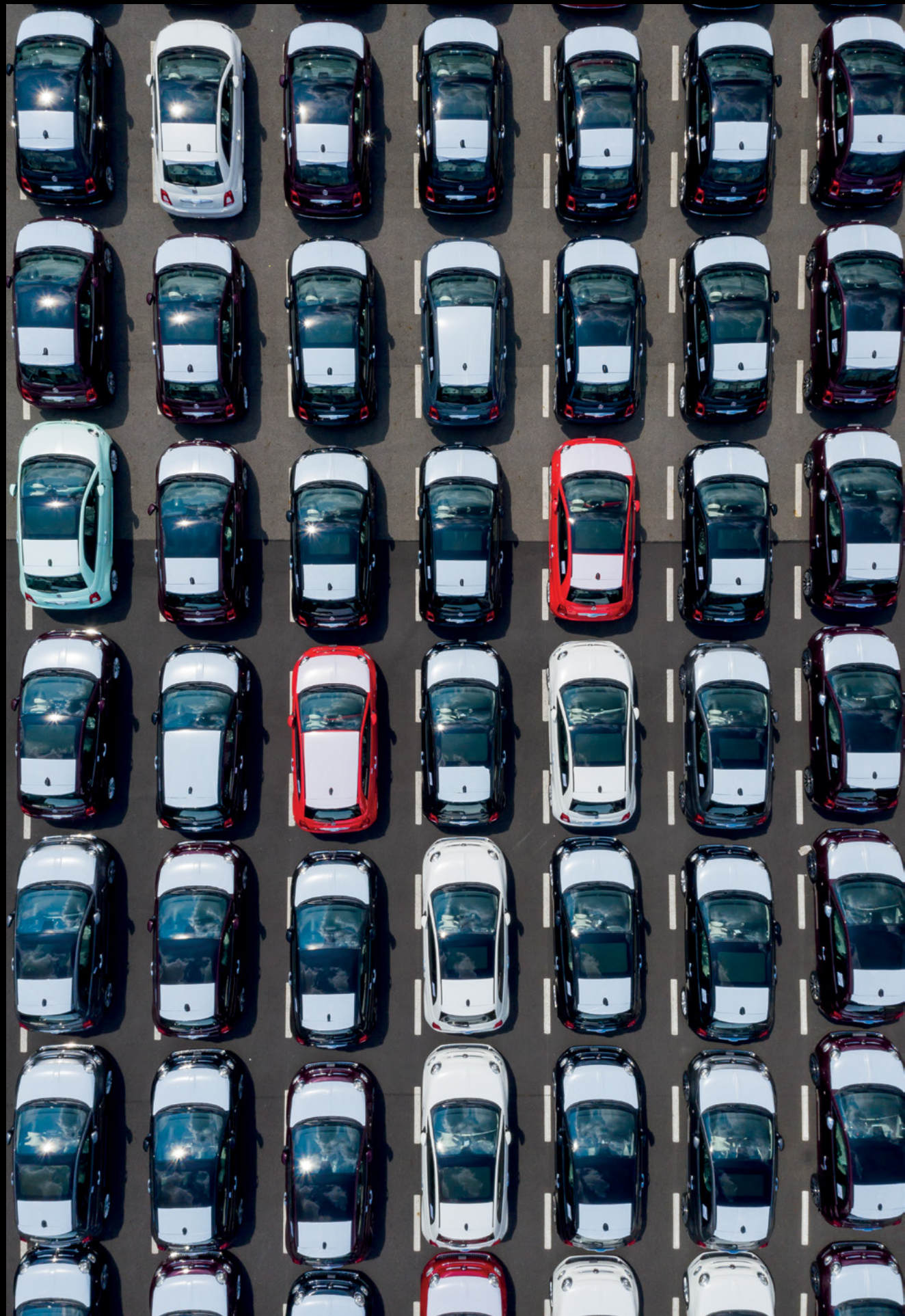
Highly qualified human resources, developed investment areas, high-quality technical infrastructure, smooth cooperation between the regional authorities, urban centers and business environment institutions, an efficient education system, numerous scientific and research bodies, as well as specialised service providers — all this builds the strength of the Silesian Voivodeship's economic ecosystem.

METROPOLITAN UNION

It was in the Silesian Voivodeship that the first metropolitan union in Poland was established in 2017, by way of a law: the **Metropolis GZM**. The metropolis is composed of **41 cities, towns and municipalities**, with over **2 million inhabitants**. There are approximately **240 thousand companies and enterprises** operating in its territory, generating around **8% of Poland's GDP**.

Population





Economy

The Silesian Voivodeship is a region characterised by a modern economic structure. The region is changing dynamically, focusing on the development of knowledge and technology, but not forgetting its industrial potential. It is also one of the Polish leaders in terms of the GDP generated and of the volume of goods and services exported.

Grzegorz Puda
SECRETARY OF STATE,
MINISTRY OF DEVELOPMENT
FUNDS AND REGIONAL POLICY



Economy

- **second strongest region of Poland in economic terms**
- **region exporting the largest amount of goods in Poland (13% of Poland's total exports in 2017)**
- **second place in Poland in terms of GDP generation (12.3%)**
- **486 thousand national economy entities**

FOREIGN CAPITAL

The Silesian Voivodeship stands out on the market of foreign direct investments: **8.5%** of entities with foreign capital in Poland have offices in the region.

MAJOR POLISH COMPANIES

27 of the 300 largest Polish companies have their offices in the Silesian Voivodeship, including among others: **Tauron Polska Energia S.A.** (power engineering), **PPHU Specjał** (FMCG), **JSW** (mining), **Polska Grupa Górnicza** (mining), **Farmacol** (medicine distribution), **Węglokoks** (coal trading), **Famur** (electric machinery), **Press Glass** (glazing unit manufacturer), **Rafako** (boiler manufacturer), **Colian** (confectionery), and **Mostostal Zabrze** (construction).

ABUNDANT NATURAL RESOURCES

Natural resources are abundant and include deposits of zinc and lead, methane, natural gas, marl, limestone, natural aggregate and hard coal, as well as medicinal, thermal and mineral waters.

INDUSTRY 4.0

After the economic transformations in the region, the Industry 4.0 era has arrived, based on skilled workforce, automation, digitisation and cutting-edge technologies.

BUSINESS SUPPORT SERVICES

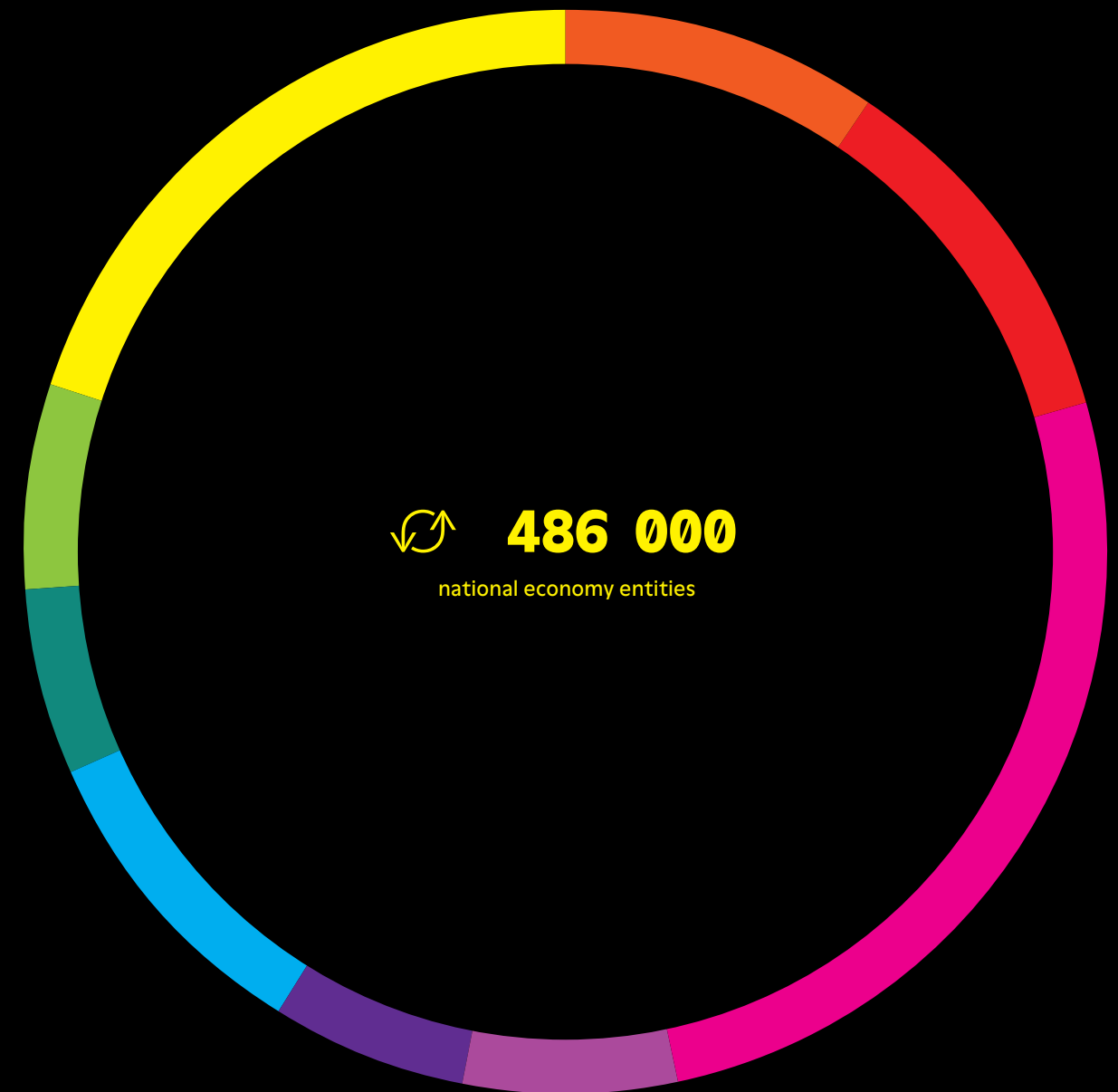
The role of modern business support services is growing — more than **22,000 people** are employed in this industry in **100 or so business service centers** only in the central part of the region.

STRONG SCIENCE AND RESEARCH HUB

In terms of the number of scientific and research entities, the Silesian Voivodeship comes second in Poland, and third when it comes to spending on research and development. The activities of scientific and research institutes and of higher education institutions focus primarily on environmental protection, power engineering, automation, electronic engineering, and construction.

Economic structure of the region

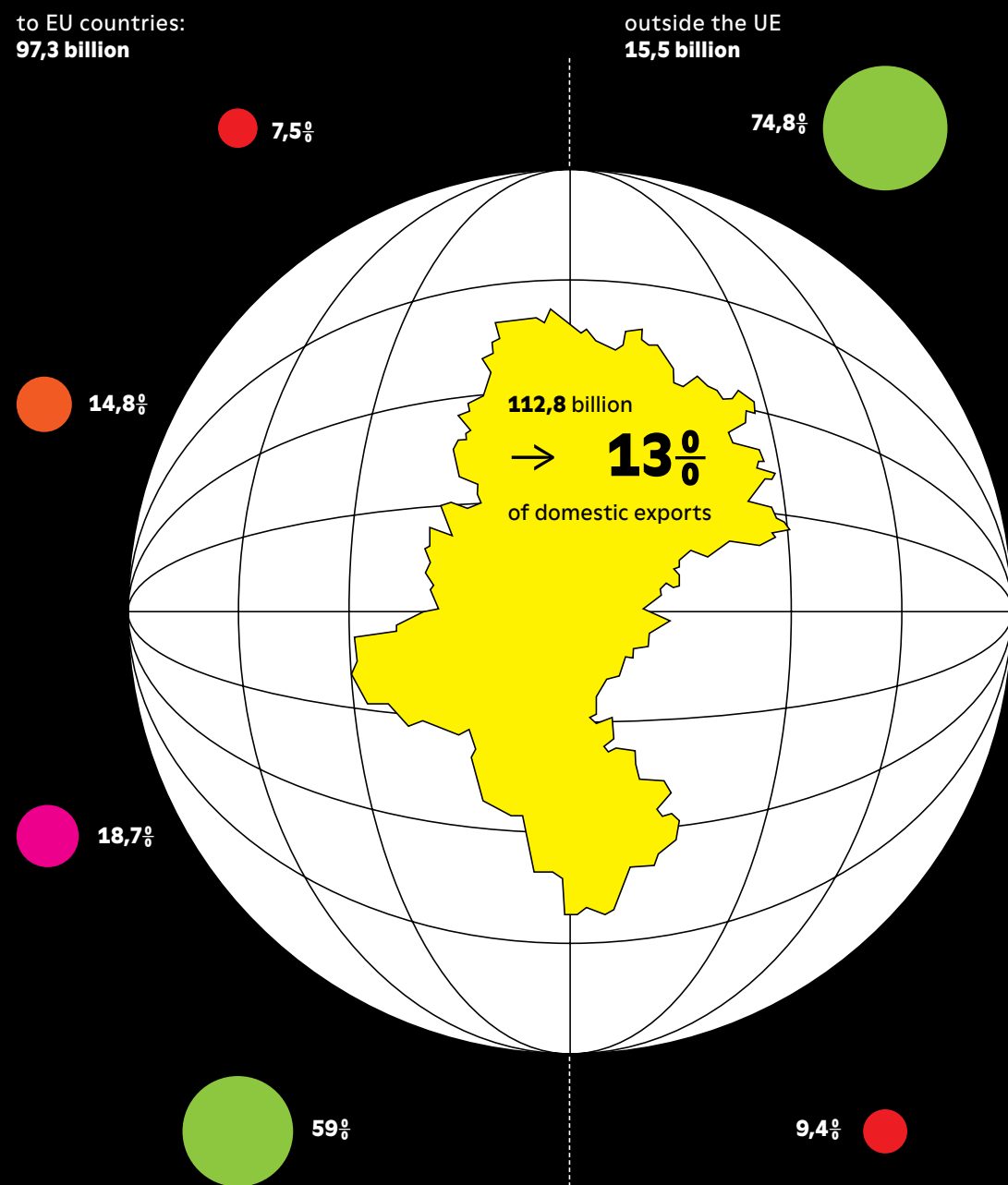
	9,5% — industrial processing		9,5% — professional, scientific and technical activities
	11,2% — construction		5,5% — health care and welfare
	26,2% — trade, repair of motor vehicles*		6,3% — other service activities
	6,2% — transport and warehouse management		19,8% — other sections
	5,8% — real estate market services*		



* except individual farmers

Export

- automotive parts and accessories
- products related to the coal mining industry
- cars and other motor vehicles for passengers transport
- other



Share of voivodeships in generation of GDP in 2017

- 1,989,314 million PLN — Poland
- 17,2% — Warsaw Capital City Area
- 12,3% — Silesian Voivodeship

→ **2nd place in Poland**





Demography and human potential

Aware of their social mission, higher education institutions in the Silesian Voivodeship have been engaging for many years now in a multifaceted process of transformation of the region dominated by traditional heavy industry and mining sectors. Joint activities contribute, among others, to the building of a green economy region and of modern and emerging industries, to make the area appealing for investors and friendly to its inhabitants. Education at the highest level, innovative scientific research as well as artistic activity are the foundation underlying Poland's sustainable development. This is particularly important in the context of the economic and social transformation of the Silesian Voivodeship into a hub of modern technologies, science and culture.

PROF. PhD
Andrzej Kowalczyk
RECTOR OF THE UNIVERSITY
OF SILESIA IN KATOWICE



Demography and human potential

- **over 4.5 million inhabitants, accounting for over 12% of the country's population**
- **8.5 million people living within the radius of 100 km from Katowice**
- **highest degree of urbanisation in Poland: 77.6% of the people live in cities**

The Silesian Voivodeship is a huge selling market for consumer goods.

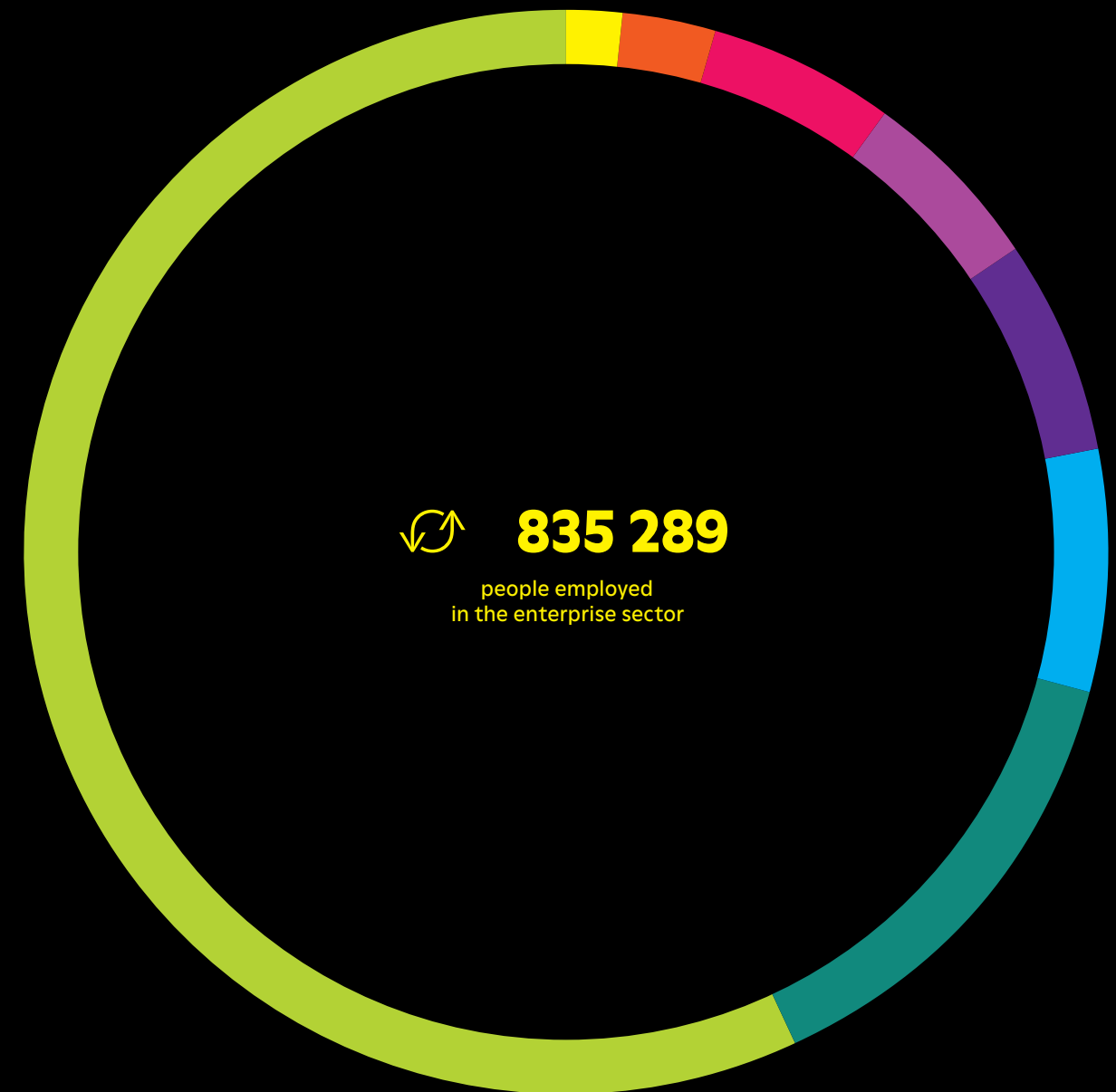
Highest population density in Poland – **369 persons/km²** (EU average: 114/km²)

In the central part of the region, the population density rate is **887 persons/km²** — well above the national average (123/km²).

The proximity of large urban centers such as Kraków, Łódź, Wrocław, as well as Prague, Ostrava, Vienna, Budapest and Bratislava make the voivodeship an attractive place to live and do business in.

Nearly 21 million people live within the radius of 200 kilometres from Katowice.

Structure of employment in the enterprise sector broken down according to the Polish Classification of Activities (PKD) section in 2018





Education

The Silesian University of Technology is one of 10 universities in Poland recognised in the “Excellence Initiative — Research University” programme. This provides unprecedented opportunities for staff development and for the pursuit of excellence in scientific research and teaching. The status of a leading technical university in the most dynamically developing and most industrialised region of Poland, as well as the strong links with state-of-the-art technology, predestines the Silesian University of Technology to focus its efforts on applied research, technology transfer and raising the standard of living of the general public, as well as development of the economy, relying in the teaching of undergraduate and graduate students on research and innovation using state-of-the-art methods and forms of education, inspired by real-life problems. The Silesian University of Technology is known for its achievements mainly in the six priority research areas it has defined: computational oncology and personalised medicine, artificial intelligence and data processing, materials of the future, smart cities and mobility of the future, process automation and industry 4.0, climate and environmental protection, as well as modern power engineering.

**PROF. PhD ENG
Arkadiusz Mężyk
RECTOR OF THE SILESIA
UNIVERSITY OF TECHNOLOGY**



Education, R&D

- around 40 universities and 120 thousand students
- over 38,000 graduates annually
- foreign students from 63 countries
- second largest research and development hub in Poland

HIGHER EDUCATION INSTITUTIONS

There are various types of higher education institutions operating in the Silesian Voivodeship, including universities as well as higher education schools of technology, economics and teaching.

The best-known ones are the **University of Silesia in Katowice**, the **University of Economics in Katowice**, the **Silesian University of Technology in Gliwice**, the **Częstochowa University of Technology**, the **Medical University of Silesia in Katowice**, the **Academy of Fine Arts in Katowice**, the **Academy of Music in Katowice**, and the **University of Bielsko-Biała**.

Universities from the Silesian Voivodeship have been listed for many years among the best educational and scientific institutions; for instance the Silesian University of Technology in Gliwice came 4th in Poland in the ranking list of technical universities, and 9th among all Polish higher education institutions in 2018.

FOREIGN STUDENTS

Foreign students studying at universities in the Silesian Voivodeship come from 63 different countries. The largest share is represented by students from Ukraine (47.1%), followed by the USA (8%), Sweden (5.4%) and Norway (4.4%).

RESEARCH & DEVELOPMENT HUB

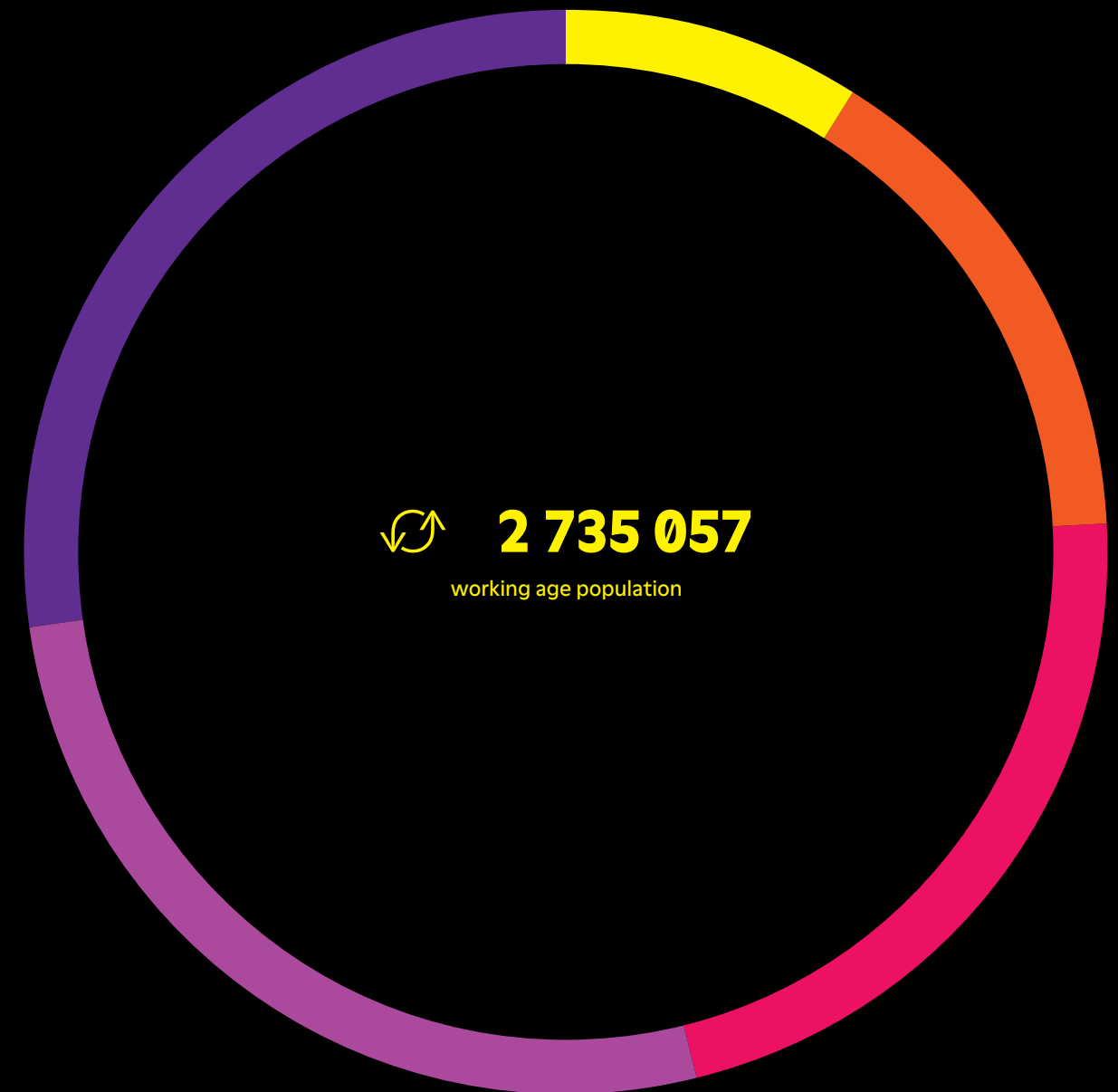
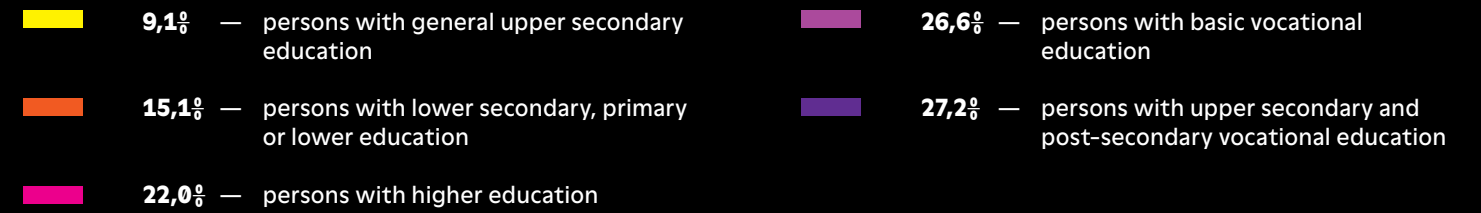
Silesia is the second largest research and development hub in Poland, with scientific and research entities as well as higher education institutions conducting scientific and research activities independently or in cooperation with business.

In 2016, the Silesian Voivodeship ranked 2nd in Poland in terms of the number of inventions filed and patents granted.

INNOVATORS' CLUB

It was established in 2017 by the Katowice Special Economic Zone, it brings together creative young people and is an educational and training platform. The Club's partners are the Silesian University of Technology in Gliwice, the WSB Academy in Dąbrowa Górnicza, the Silesia Automotive & Advanced Manufacturing cluster (SA&AM), and innovative companies.

Structure of the working age population by level of education

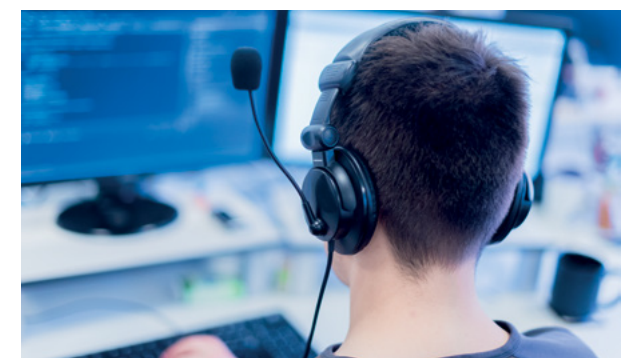




Smart specialisations of the region

One of the particularly valuable initiatives undertaken in the region was the creation of the Valley of Medicine and New Technologies in Zabrze. Visionaries such as Professor Zbigniew Religa have made artificial hearts a Polish product. It should be emphasised that the integration of research centers and the intensification of their innovative and implementation work became possible thanks to the establishment of the first Medical Park in the Silesian Voivodeship, Kardiomed Silesia.

**PROF. MD, PhD
Marian Zembala
DIRECTOR OF THE SILESIAN CENTRE
FOR HEART DISEASES IN ZABRZE**



Smart specialisations

- **medicine, information and communication technologies, energy industry, green economy, and emerging industries**
- **the first Regional Innovation Strategy in Poland**
- **the growing role of e-mobility, e-sports, design, IoT (internet of things), and nanotechnology**

MEDICINE

This is one of the distinguishing features of the Silesian Voivodeship in Poland, due to its excellence in numerous fields of prevention, treatment and rehabilitation, and to widely recognised medical engineering products. This field is inextricably linked with the creation, adaptation or absorption of state-of-the-art medical engineering, biotechnology, materials engineering, IT and electronic engineering solutions.

INFORMATION AND COMMUNICATION TECHNOLOGIES

They are of horizontal importance for the technological, economic and social development of the region, as they improve access to knowledge and enable the creation and distribution of goods and services. They make it possible to participate in global cooperation networks and create of management systems linked to smart markets.

ENERGY INDUSTRY

An important economic sector of the region and of the national economy. The region plays an important role in maintaining the country's energy security, and power engineering is a sector where cutting edge solutions are deployed (such as hydrogen technologies).

GREEN ECONOMY

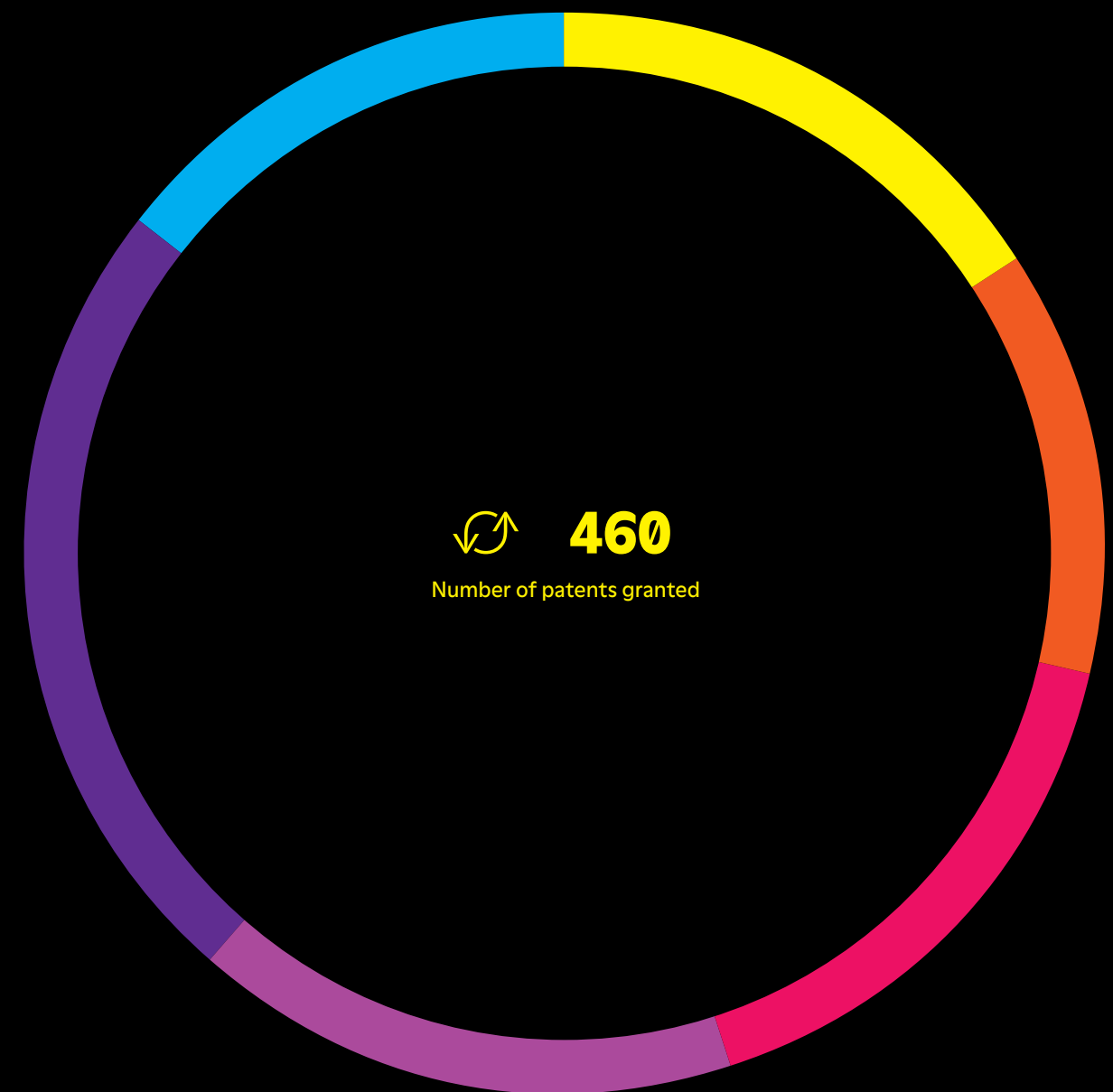
A priority area due to the greatest potential to be used in the economy, comprising activities supporting economic development, with guaranteed constant availability of natural capital and ecosystem services (green growth), environmental, economic and social policy, and innovation ensuring efficient use of resources in production and consumption processes for the general public (green economy).

EMERGING INDUSTRIES

Innovation and great friendliness to business, noticed every year not only by Polish, but also by foreign operators, can be seen in the diverse and modern economic structure, in the expansion of knowledge focusing on technology, innovation and industrial tradition, and in the "Regional Innovation Strategy for the Silesian Voivodeship for 2013–2020", developed with precisely defined innovation goals and implemented.

Number of patents granted in the Silesian Voivodeship*
in brackets: position among the regions in terms of the number of patents granted

■ 73 (3) — health care; saving lives; entertainment	■ 76 (2) — construction
■ 59 (3) — moulding	■ 111 (1) — hydro-engineering; foundation engineering; earth works
■ 75 (2) — transport	■ 66 (3) — instrumentation



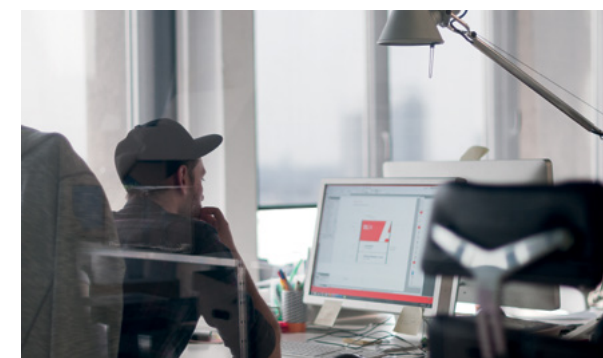
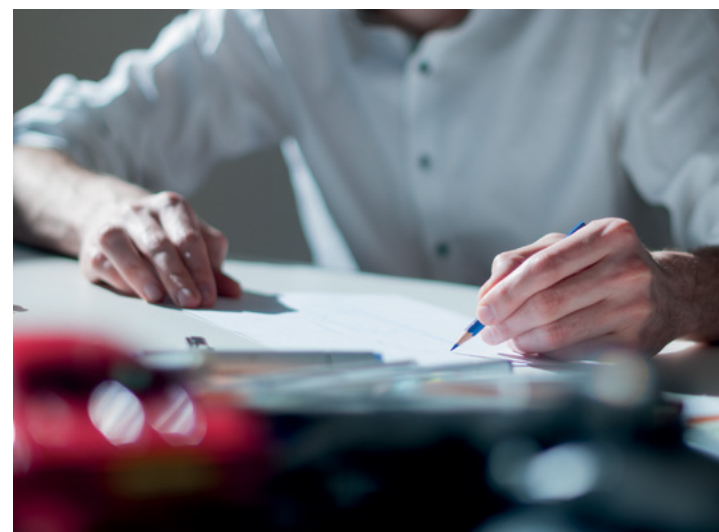
* Source: Report on the evaluation study entitled "Processes of entrepreneurial discovery in the context of the innovative development of the Silesian Voivodeship until 2020". Central Mining Institute — Marshal Office of the Silesian Voivodeship, Katowice 2017.



Business environment

The dynamically developing enterprise sector is one of the most important factors supporting the growth of competitiveness and economic innovation. As a key region in the building of the Polish GDP, the Silesian Voivodeship makes an excellent place to build businesses becoming champions in many sectors of the economy, including new technologies. To meet the needs of business, the Silesian Development Fund is a partner of first choice for enterprises, business environment institutions and international entities, by coordinating and managing European funds dedicated to the development of Silesian entrepreneurship.

Marcin Wilk
PRESIDENT OF THE MANAGEMENT BOARD
SILESIA DEVELOPMENT FUND



Business environment

- largest number of business support institutions in Poland
- clusters as catalysts of innovative processes
- two clusters with the Key National Cluster status
- well-functioning ecosystem of cooperation between local government units, science and business

INSTITUTIONS

The most important business environment institutions are the **Upper Silesian Fund**, the **Silesian Development Fund**, the **Regional Chamber of Commerce and Industry in Katowice**, the **Chamber of Crafts and Small and Medium Enterprises**, the **Silesian Chamber of Agriculture** and the **Katowice Special Economic Zone**, the **Upper Silesian Agency for Enterprise and Development**, and **clusters**.

The activities of regional and local development agencies, chambers of commerce and industry, as well as craft guilds improve the competitiveness of small and medium-sized enterprises and influence their further development.

An important part of the business environment ecosystem is represented by loan, guarantee and venture capital funds, as well as by industrial and science & technology parks, established to support innovation in the economy and technology transfer. Such institutions include for instance **Silesian Venture Capital**, whose aim is to improve the economic potential of the Silesian Voivodeship and of Poland.

KATOWICE SPECIAL ECONOMIC ZONE

The Financial Times has named it the best economic zone in Europe several times, and the world's second best economic zone twice. It consists of four sub-zones: Gliwice, Jastrzębie-Żory, Sosnowiec-Dąbrowa, and Tychy. Over 400 Polish and foreign business entities operate here.

The value of the investments implemented by companies in the zone is estimated at over 36 billion PLN, and they employ over 80 thousand people. The KSEZ offers special tax reliefs for companies setting up business in the zone, as well as properly prepared land, warehouses, manufacturing shops, and offices.

One of the largest investors acquired in 2019 is the Korean company SK Innovation, which will invest over PLN 1 billion in Dąbrowa Górnicza and employ at least 300 people. The largest foreign investors in the zone include Manufacturing Poland sp. z o.o., Ceramics Polska, Guardian Częstochowa, Brembo Poland, Kronospan OSB, Saint-Gobain Innovative Materials Polska, Adient Seating Poland, Eaton Automotive Systems, Sp. z o.o., and Nexteer Automotive Poland. The largest Polish investors in the zone include Mokate Sp. z o.o, Glass, M-Logistic, Ekoland, Extral, Huta, Bioagra-Oil, and Alupol Packaging.

Number of clusters in individual voivodeships

54

clusters (2 Key National Clusters)

22

Industrial and Science & Technology Parks

24

Chambers and Associations

27

Agencies and Training & Advisory Centers



Fundusz Górnośląski S.A. — Upper Silesian Fund: 25 years of supporting the development of the Silesian Voivodeship. We provide tools to institutions in the region to streamline financial operations and reduce their costs and risks. We help micro-, small and medium-sized enterprises at every stage of their activity: we enable their launch, support their development and help in the internationalisation process. To this end, we invest in business entities, raise funds for regional investments, and cooperate with local government units.

Krystian Stępień
 PRESIDENT
 UPPER SILESIAN FUND — FUNDUSZ GÓRNOŚLĄSKI S.A.

ASSOCIATION OF BUSINESS SERVICE LEADERS

The Association of Business Service Leaders (ABSL) is a leading organisation representing the modern business services sector in Poland. It brings together more than 200 major companies from the sector, which already employs nearly 350,000 people. ABSL represents Shared Service Centers (SSC), Business Process Outsourcing (BPO) and IT outsourcing (ITO) centers, as well as R&D centers. Its members include **Accenture, Amazon, Arvato, Capgemini, Carlsberg, Goldman Sachs, Google, Hewlett Packard Enterprise, IBM, Infosys, JLL, Kimberly Clark, Luxoft, MAN, Nokia, Procter&Gamble, PwC, Shell, Toyota, and UBS.**

The ABSL Silesia Regional Chapter in Katowice is a local community supporting members of the Association in their activities, as well as in the exchange of knowledge and best practices to build a friendly investment climate. The members of the ABSL Silesian Regional Chapter actively work with representatives of the Marshal's Office of the Silesian Voivodeship and municipal offices, the Metropolis GZM, the Katowice Special Economic Zone, the Regional Chamber of Commerce and Industry in Katowice, and higher education institutions. Currently, companies in the modern services sector employ almost 25,000 people in the region, recording a 43% increase in employment in 2016—2019.

KEY CLUSTERS

The Silesian Voivodeship has the largest number of clusters in Poland. The mission of clusters is to create a platform for cooperation between entrepreneurs, scientific institutions, public administration bodies and business support organisations in order to increase the importance of modern technologies and science in the shaping the economic and innovative future of the Silesian Voivodeship.

Two clusters have the status of Key National Cluster, i.e. a cluster significant for the national economy, with a high degree of international competitiveness.

→ **SILESIA AUTOMOTIVE & ADVANCED MANUFACTURING (SA&AM) CLUSTER**

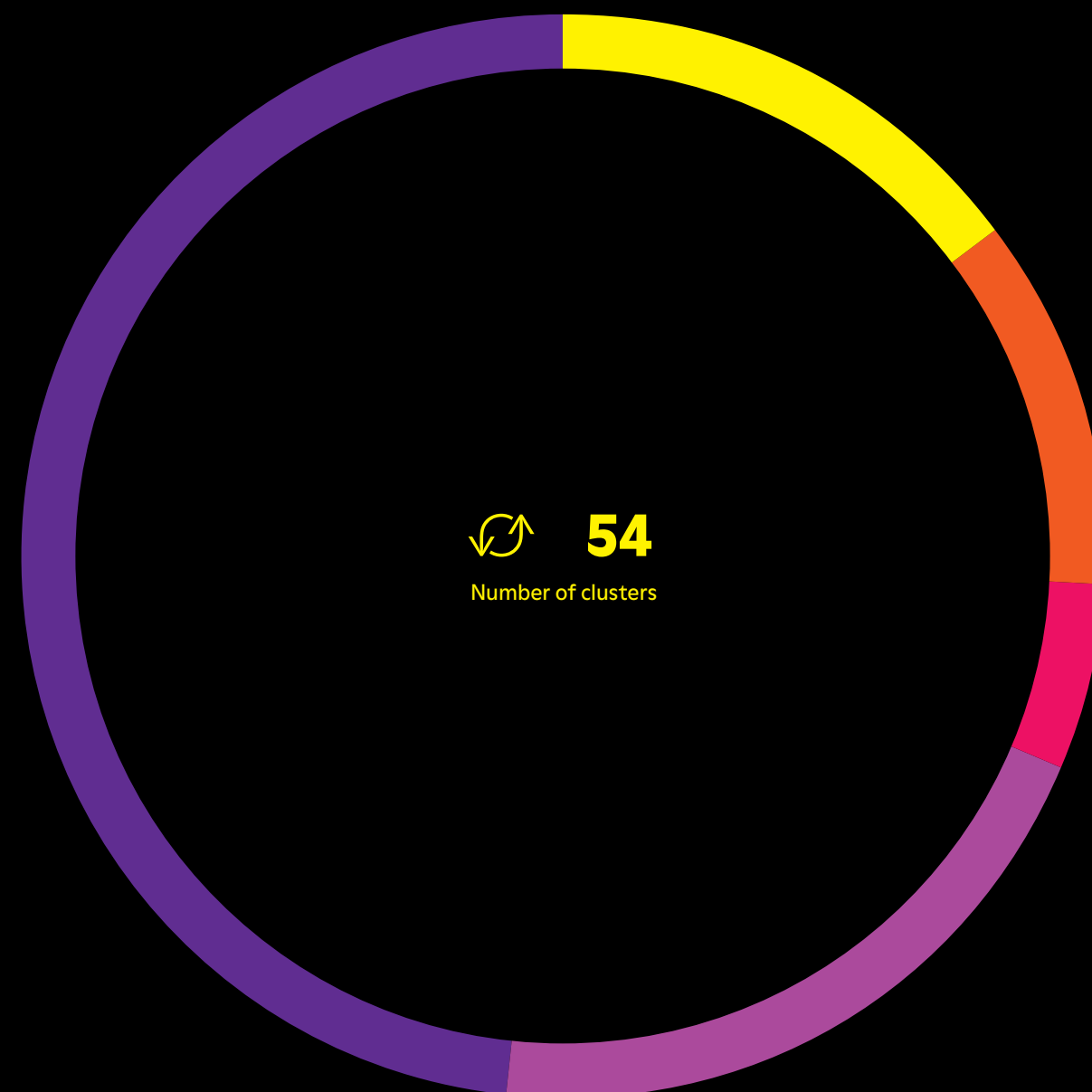
supporting entrepreneurs from the automotive and high-tech sectors;

→ **SILESIA AVIATION CLUSTER**

established by representatives of the aviation industry in order to strengthen cooperation between enterprises and create optimal conditions for continuous transfer of knowledge and innovative solutions between members of the cluster, coming not only from the aviation sector but also from other branches of science and industry.

Number of clusters in smart specialisations (2018)

- 8 — energy sector
- 6 — ICT
- 3 — medicine
- 11 — green economy
- 26 — emerging industries



* Source: JKW RIS, Inobservator Silesia



Real estate

The Katowice urban agglomeration is currently the fifth largest office market in Poland (after Warsaw, Kraków, Wrocław, and the Tricity), and in 2018 the total supply of modern office space exceeded 500,000 m². According to the JLL report, resources keep growing in Katowice, and by the end of 2021, up to 150,000–200,000 m² of additional office space may be offered on the market.

Marcin Nowak
PRESIDENT OF THE MANAGEMENT BOARD
ABSL



Real estate

- **2nd largest market of modern warehouse space**
- **availability of high-quality office space**
- **region acting as a distribution hub for Central and Eastern Europe**

KATOWICE URBAN AGGLOMERATION

The urban agglomeration's growing business potential has resulted in growing demand on the part of companies from the modern services sector, represented by ABSL, as well as to an extended portfolio of investors in the real estate market. Recently, entities such as **Cavatina** and **Vastint Poland** have decided to enter the market in Katowice. Some companies that have already implemented projects on the local market, such as **Echo Investment**, **GTC**, **Skanska Property Poland**, and **TriGranit Development** are also either expanding their portfolio in the Silesian Voivodeship or planning to do so.

Local real estate developers, including **DL Invest**, **GPP**, **Maksimum Holding** and **TDJ**, are very active on the market, coming close to owning almost a third of all available office space. They use increasingly modern technologies to operate in line with environmental sustainability. The GPP Business Park IV building is the first office building in Poland which generates more energy than it consumes.

OFFICE SPACE

Katowice comes 5th in Poland in terms of the supply of modern office space, amounting to over 500 thousand m² (including co-working spaces). By 2022, another 250,000 square metres of modern office space are expected to be created.

WAREHOUSE SPACE

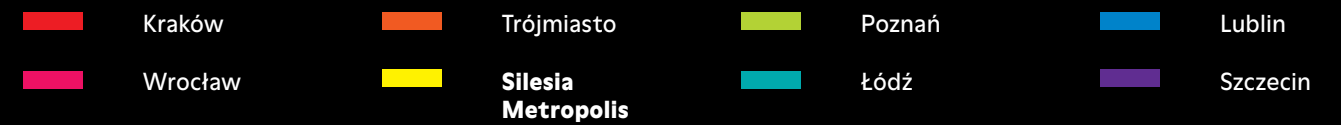
Modern warehouse space in the region is estimated at 2,86 million m².

DISTRIBUTION HUB

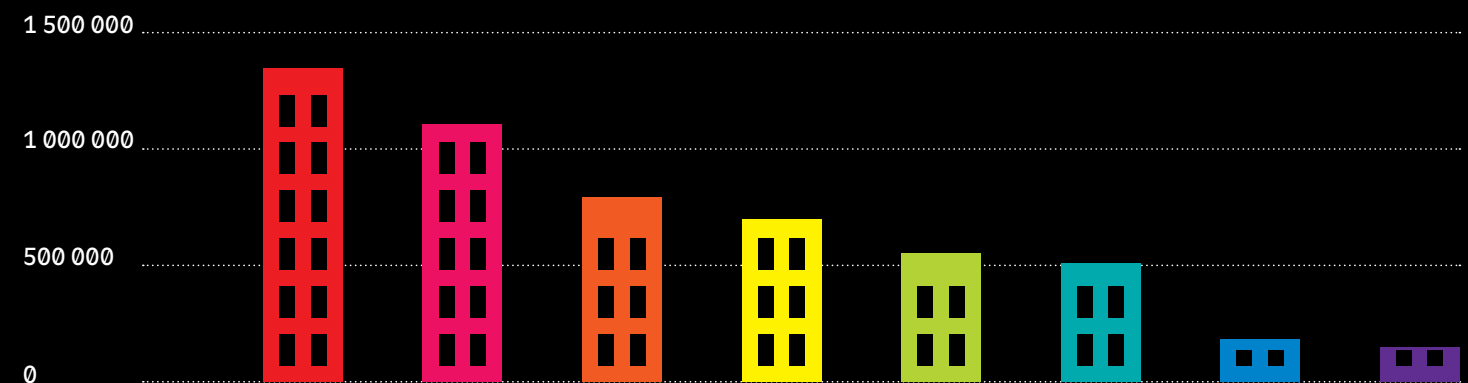
The Silesian Voivodeship has become a distribution hub for Central and Eastern Europe due to the excellently developed road infrastructure, location at the intersection of the two largest Polish motorways: A1 and A4, expressways, the high level of industrialisation of the region, the number of higher education institutions that guarantee access to qualified staff, the number of research and development centers and clusters, as well as the proximity of Katowice International Airport.

The hospitality market in the Silesian Voivodeship is developing dynamically — currently around 56% of hotel rooms in Katowice are offered in 4-star hotels.

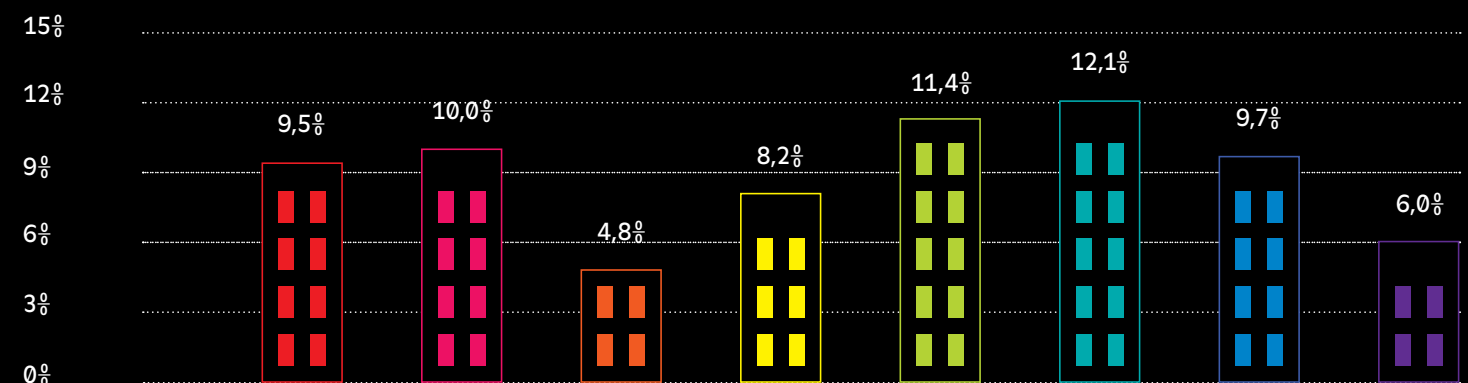
Office space on regional markets in Poland



Office space in m²



Office space availability rate



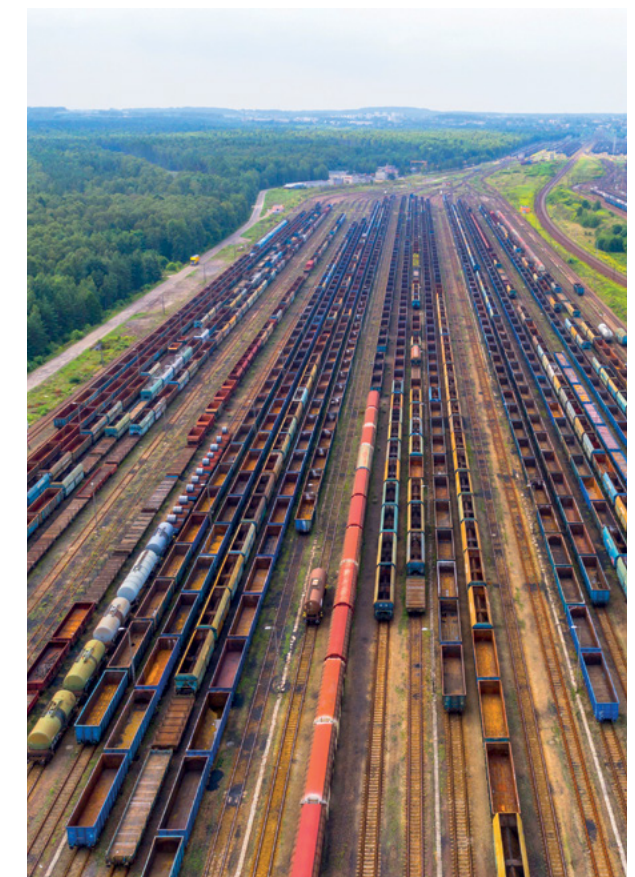
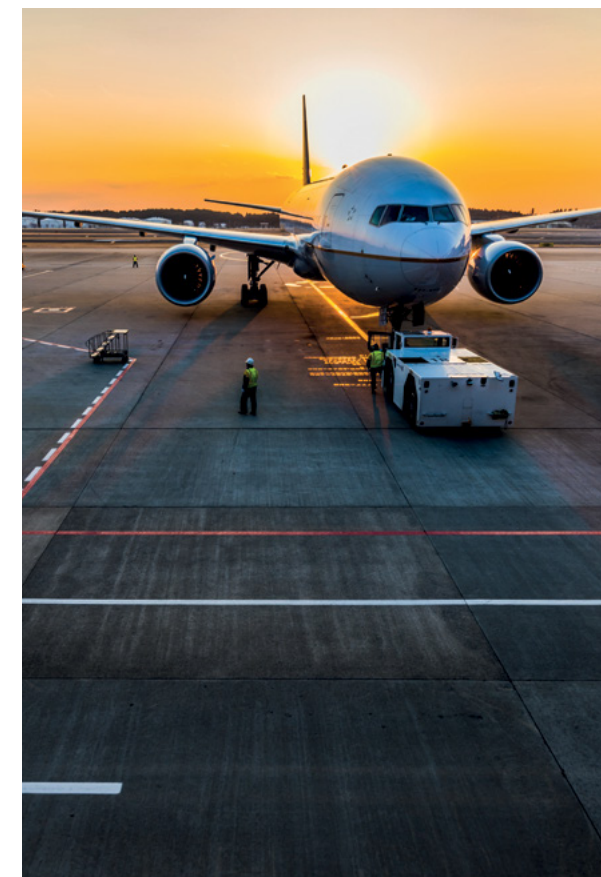


Transport and communication

The Silesian Aviation Cluster has been operating since 2006. We have over 85 members, mainly companies, but the Cluster also includes the Silesian University of Technology in Gliwice and the Institute of Aviation. Contrary to what might seem, aviation in the Silesian Voivodeship has a very long tradition, mainly in the field of light aviation and gliding, traditions we continue today manufacturing gliders, components for large aircraft, and since recently also drones. We participate in an initiative called Drone Valley, designed to make Silesia a hub for drone development for the whole of Poland.

Our dynamic development is possible thanks to the fact that we operate in the Silesian Voivodeship, the most industrialised province of Poland.

**Krzysztof Krystowski
PRESIDENT
SILESIA AVIATION CLUSTER**



Transport and communication

- region with the best transport accessibility in Poland
- 1st place in Poland in terms of road infrastructure density
- 2nd place in Poland in terms of public road length

PAN-EUROPEAN TRANSPORT CORRIDORS

Silesia is a region crossed by Pan-European transport corridors: corridor III (Berlin — Wrocław — Katowice — Kraków — Lviv) and corridor VI (Gdańsk — Katowice — Žilina).

MOTORWAYS

The A1 and A4 motorways intersect in the region, creating one of the **largest interchanges in Europe — Gliwice Sośnica**, providing, among others, as many as 32 grade-separated junctions.

Road infrastructure density: 24.8 km of motorways and expressways per 1,000 km². Length of public roads: 24.9 thousand km.

TRANSPORT

The voivodeship comes first in Poland in terms of road transport of goods — over 13% of all goods shipped from Poland are transported here.

INTERURBAN EXPRESSWAY (DTŚ)

The region's main trunk road, connecting 6 cities of the Upper Silesian conurbation (from Gliwice to Katowice).

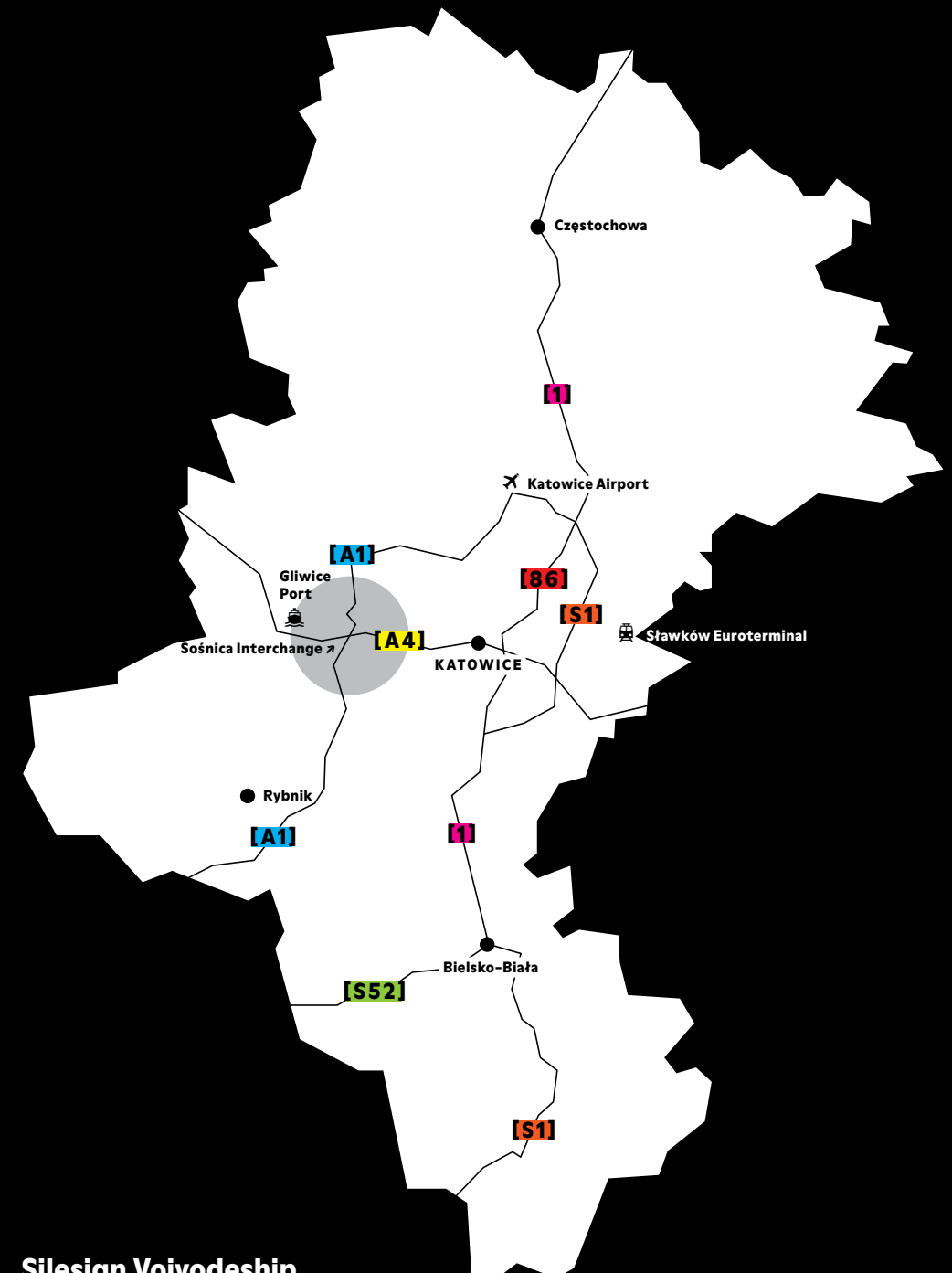
HIGH TRAFFIC VOLUME

The route from Sosnowiec to Katowice (S86 national road) is one of the most travelled sections of national roads in Poland, with daily traffic exceeding 110 thousand vehicles.

Interurban Expressway:
Gliwice ⇄ Zabrze ⇄ Ruda Śląska ⇄ Świętochłowice ⇄ Chorzów ⇄ Katowice

The Silesian Voivodeship has the best transport connections of all Polish regions. We have the densest road network here, allowing the local people and tourists to travel quickly and safely across the region.

Kajetan Kajetanowicz
POLISH RALLY DRIVER



Rail transport

- the longest and densest railway network in Poland
- more than 50% of domestic rail services
- railway junction in Tarnowskie Góry: one of the largest in Europe
- Euroterminal in Sławków: the westernmost point where standard-gauge and broad-gauge rail systems meet

WELL-DEVELOPED INFRASTRUCTURE

The voivodeship has the longest (over 10% of the national railway network) and the densest (16 km per 100 km²) railway network in Poland. The region is crossed by important railway routes, three of which are part of the AGTC international combined transport network. Over 84% of the standard-gauge rail network is electrified, which is a high percentage (Poland: 61.8%).

EUROTERMINAL IN SŁAWKÓW

The terminal has an internal network of railway tracks, both broad-gauge and European standard, and is thus connected to the cargo flow system on the Asia/Far East — Western Europe axis.

INVESTMENTS

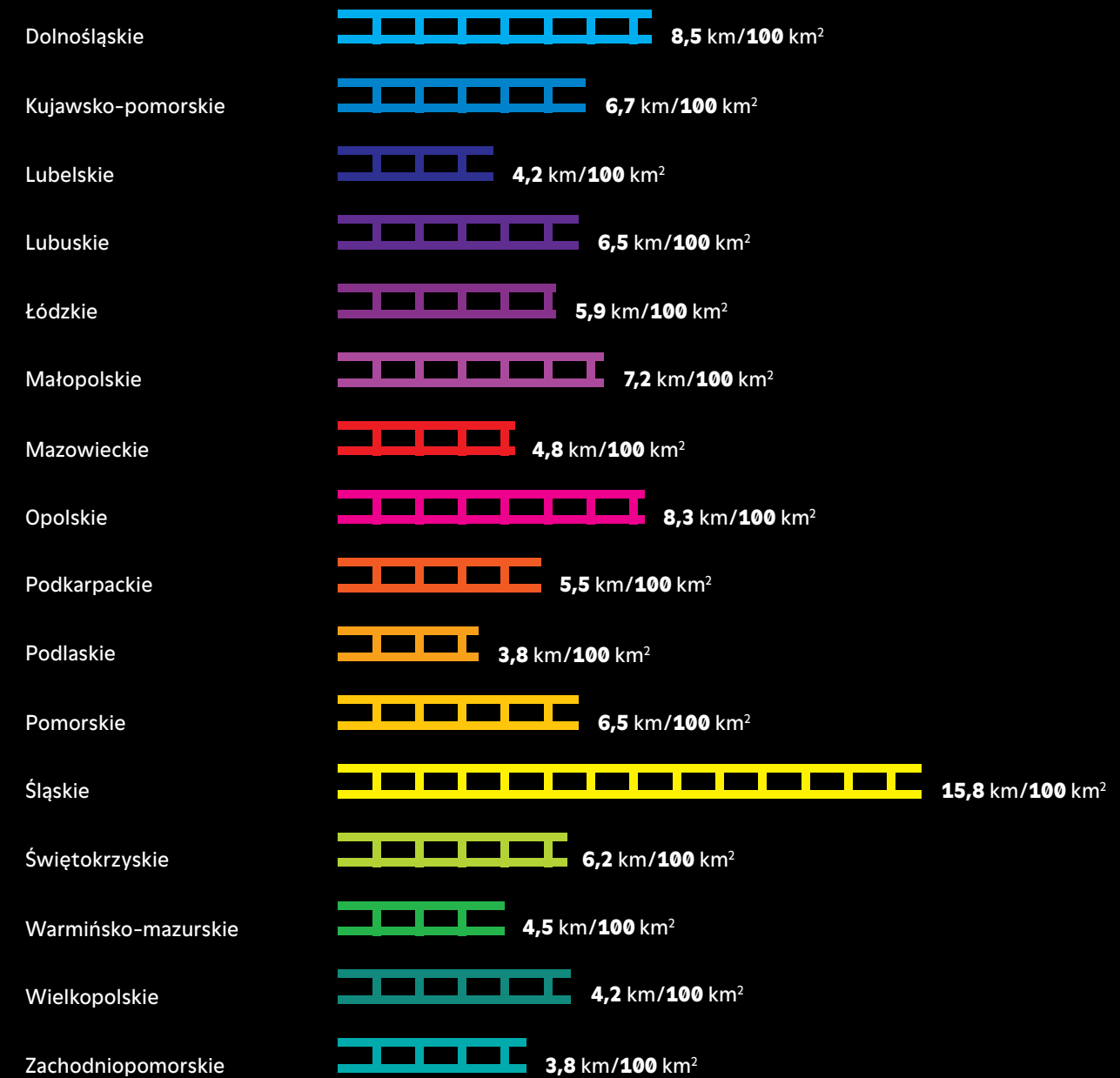
A number of investments are in progress in the dynamically developing Silesian Voivodeship: PLN 371 million will be spent on the modernisation of the Częstochowa–Zawiercie section on the line from Warsaw to Katowice, PLN 200 million on the improvement of the Czechowice–Dziedzice–Bielsko-Biała–Zwardoń (state border) line, while access to the popular resort town of Wisła will become easier after revitalisation of the line from Chybie via Skoczów.

Density of standard-gauge lines

Year after year, more and more people choose Silesian Railways — in 2019, we carried over 20 million passengers, almost 3 million more than in 2018. The increase in the amount of transport work we do has been going hand in hand with intensified operational work, investments in rolling stock development, and in the company's technical facilities.

Aleksander Drzewiecki

PRESIDENT, SILESIA RAILWAYS — KOLEJE ŚLĄSKIE SP. Z O.O.



→
7,3%
of domestic passenger transport

Routes operated by Euroterminal Sławków

“Euroterminal Sławków” sp. z o.o. is located at the intersection of international transport corridors (North-South — Pan-European Transport Corridor III, East-West — Pan-European Transport Corridor VI). It is the westernmost point of contact between the standard-gauge railway (1,435 mm) and the broad-gauge section (1,520 mm), making it particularly important for container rail transport carried out on the “New Silk Road”.

Jakub Styczeń
PRESIDENT,
EUROTERMINAL
SŁAWKÓW
SP. Z O.O.

10

million ton export and import of cargo by rail Broad Gauge Metallurgy line in 2016

24,251

thousand tonnes of imported goods carried by rail freight in 2017

36,180

thousand tonnes of exported goods carried by rail freight in 2017

7.01.2020

arrival of the first train from China at the Euroterminal in Sławków



Air transport

- leader among Polish regional airports in the cargo segment
- Katowice Airport ranks 3rd in Poland in terms of passenger numbers
- 3 international airports within the radius of 100 km from Katowice (Katowice Airport, Kraków and Ostrava)
- the highest and most modern control tower in Poland

LOCATION

Katowice Airport is one of the key elements of the transport system in the voivodeship. The airport is located **around 30 km north of Katowice**, and used by passengers from southern Poland, Czechia and Slovakia. The airport's site conditions are such that many flights are redirected to Katowice Airport from other Polish airports.

PASSENGER FLOW

Total passenger traffic in 2018 reached almost **5 million** passengers, which was a record result.

CARGO FLOW

In 2018, over **18 thousand** tonnes of goods were transported, the main forwarders including the following: DHL Express, UPS, TNT Express Worldwide, FedEx, Cargo Express, DB Schenker Logistics, and UPS Polska.

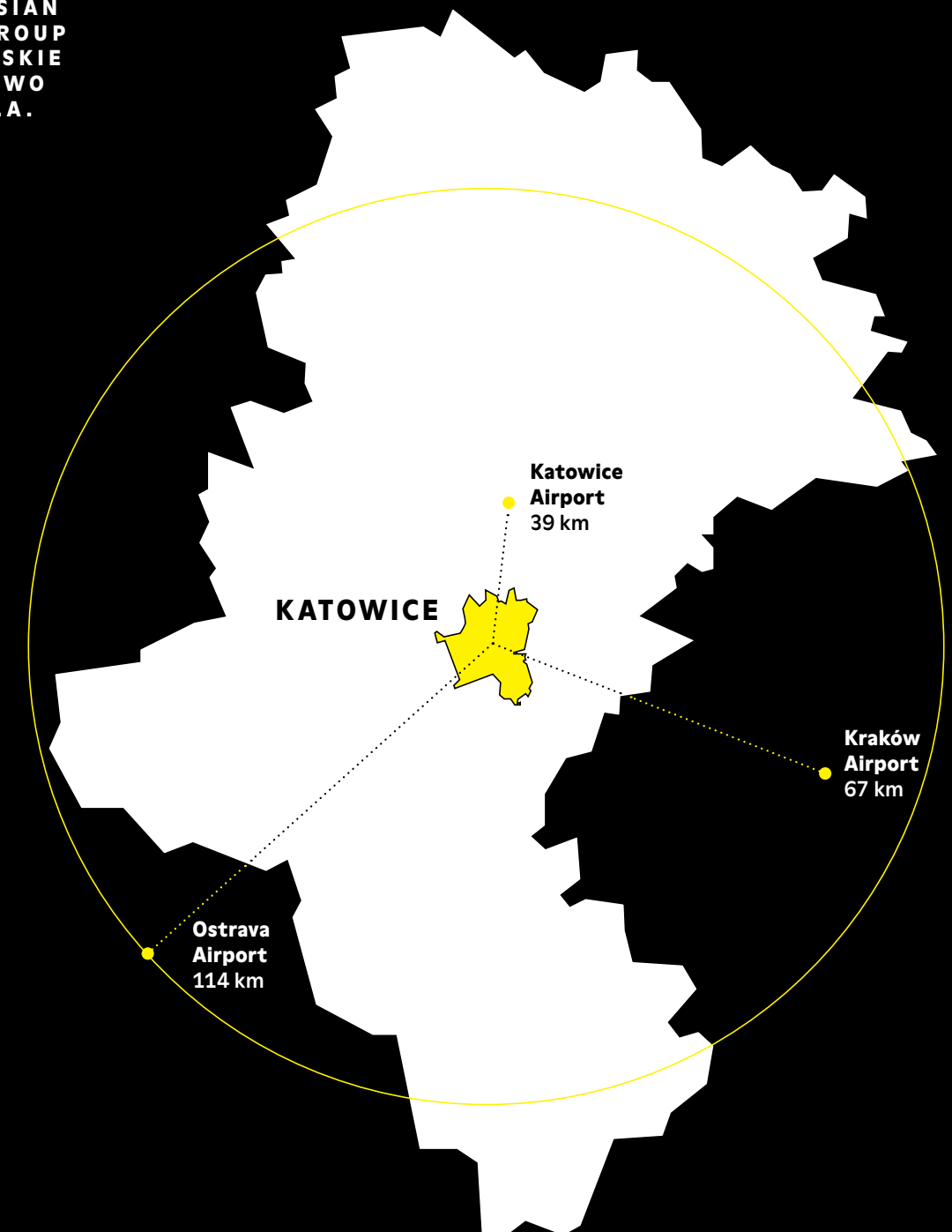
NEW CONTROL TOWER

A new control tower was opened in October 2019 — at **46 metres**, it is currently the highest and the most modern control tower in Poland and one of the most modern structures of its kind in Europe.

International airports within 100 km from Katowice

The Silesian Voivodeship has a large demographic, scientific and economic potential, which has a positive influence on the development of the aviation industry. This is evidenced by the position of Katowice Airport, which is one of the largest airports in Poland. It comes first in Poland in terms of charter flights, and it is the regional leader in the cargo segment.

Artur Tomasiak
PRESIDENT OF
UPPER SILESIA
AVIATION GROUP
- GÓRNOŚLĄSKIE
TOWARZYSTWO
LOTNICZE S.A.





International cooperation

In the past, North Rhine-Westphalia and the Silesian Voivodeship were linked by miner migrations. Today, we work together to shape the economic and social future. Our relations are excellent thanks to the involvement of cities, municipalities, schools, and associations. Our cooperation with the French region of Hauts-de-France within the Regional Weimar Triangle represents an important contribution to the cohesion of the European Union.

Armin Laschet
PRIME MINISTER
OF NORTH RHINE-WESTPHALIA

We celebrated the friendship between Poland, the Silesian Voivodeship and Hauts-de-France on 9 December last year in Lille, in connection with the hundredth anniversary of the Polish-French Convention. The Hauts-de-France Region intended in particular to commemorate the thousands of Poles who had come to work in the Nord and Pas-de-Calais mines, to contribute to the reconstruction of the country that became theirs.

The Silesian Voivodeship and the Hauts-de-France region renewed their cooperation agreement during the event, with a view to implementing ambitious joint undertakings in the fields of economy, culture and environment. The exchange of experiences with regard to mining transition, energy, climate, and the mobility of young people are projects of key importance for the future of the inhabitants of our two regions. Long live the French-Polish friendship!

Xavier Bertrand
PRESIDENT OF THE HAUTS-DE-FRANCE REGION

The Silesian Voivodeship, with its beautiful nature and hospitable people, is our best friend and partner. Our interregional cooperation is advantageous and fruitful. Together, we strive to develop our regions in various fields, bringing our societies and cultures closer together.

Davit Gabaidze
CHAIRMAN OF THE SUPREME COUNCIL
OF THE AUTONOMOUS REPUBLIC OF ADJARA

International cooperation

→ **17 foreign regional partners in 14 countries, across 3 continents**

INTERNATIONAL COOPERATION

For 20 years or so, the Silesian Voivodeship has been cooperating with regions such as **Hauts-de-France**, **North Rhine-Westphalia**, the **Moravian-Silesian Region** and the **Žilina Self-Government Region**. For many years, we have also been working with the **Walloon Region**, the **Autonomous Republic of Adjara**, the **Liaoning Province**, and the **Zhytomyr Oblast**. Recently, cooperation has been formalised with the **State of Nevada** and the **State of West Bengal**.

REGIONAL WEIMAR TRIANGLE

A valuable initiative involving the region is the trilateral cooperation within the **Regional Weimar Triangle**, pursued since 2001 by the **Silesian Voivodeship**, **North Rhine-Westphalia** and **Hauts-de-France**. Projects are carried out annually in the territory of one of the partner regions, alternately between the three of them. The cooperation covers priority areas: economic, environmental, social and cultural transformations of the territories, mobility and employment of young people, and regional cultural activities.

EUROPEAN GROUPING OF TERRITORIAL COOPERATION

In 2013, the **Silesian Voivodeship** together with the **Opole Voivodeship**, the **Moravian-Silesian Region** and the **Žilina Self-Government Region** established the **European Grouping of Territorial Cooperation (EGTC) TRITIA Ltd.**, whose activities focus in particular on the areas of transport, economic cooperation, tourism, and power engineering.

REGIONAL OFFICE OF THE SILESIA VOIVODESHIP IN BRUSSELS

The numerous tasks performed by the Office include: representing the Silesian Voivodeship in Brussels, including in particular establishing contacts with representatives of Polish and foreign diplomatic missions and representatives of other organisations, monitoring the activities of EU institutions with regard to matters important from the point of view of the Voivodeship's interests, initiation of and involvement in the implementation of programmes and projects co-financed by the European Union, and cooperating with institutions and participating in undertakings to promote the Voivodeship.

Partner regions of the Silesian Voivodeship

Hauts-de-France Region [France]
North Rhine-Westphalia [Germany]
Walloon Region [Belgium]
Žilina Self-Government Region [Slovakia]
Moravian-Silesian Region [Czechia]
Borsod-Abaúj-Zemplén [Hungary]

Region of Wales [UK]
Autonomous Region of Asturias [Spain]
Lviv Oblast [Ukraine]
Chernivtsi Oblast [Ukraine]
Donetsk Oblast [Ukraine]
Zhytomyr Oblast [Ukraine]

Western Götaland Province [Sweden]
Autonomous Republic of Adjara [Georgia]
Liaoning Province [China]
State of Nevada [USA]
State of West Bengal [India]





Investment attractiveness

The region's competitive advantage consists in its excellent location, well-prepared infrastructure, professional services provided to investors, availability of a database of co-operators, as well as in the relations with business environment institutions and the creative and well-educated human resources, responding to the needs of the market and of investors.

PhD
Janusz Michałek
PRESIDENT OF THE MANAGEMENT BOARD
KATOWICE SPECIAL ECONOMIC ZONE



Investment attractiveness

- qualified employees and high human potential
- second largest selling market in Poland
- large number of foreign companies and SMEs
- high concentration of developed investment land
- well-developed transport and social infrastructure
- efficient ecosystem of cooperation between local government units, science and business
- extensive tourism and recreational offering

For many years now, the region has topped numerous ranking lists in terms of investment appeal, both in Poland and abroad. The Silesian Voivodeship was named the **3rd best large region in Europe in terms of investment attractiveness** (in the cost effectiveness category) according to the **“European Cities and Regions of the Future 2019/2020”** report by the **Financial Times**.

Investment attractiveness is determined, among other things, by the availability of highly qualified employees, the rich industrial traditions of the region, the large selling market (the second largest in Poland), the excellently developed sector of business environment institutions, and the excellently developed road, economic and social infrastructure.

Excellent location:
6 European capitals within a radius of approximately 600 km from Katowice

5,511

number of companies with foreign capital participation

approx. **400**

businesses operating within the economic zone

approx. **80** thousand

jobs within the economic zone

over **36** billion

value of investments within the economic zone





Culture

The "Śląsk" ensemble was established on 1 July 1953. It owes its unique character to the founder and creator, Stanisław Hadyna, Silesian composer and writer. At present, it is a huge cultural institution capable of performing up to 200 concerts a year. These great Ambassadors of Polish Culture have performed more than 8 thousand times in total for audiences totalling over 25 million in 44 countries, on five continents. The ensemble's repertoire is a genuine treasury of Polish culture, from which "Śląsk" has been drawing inspiration for over six decades now.

Zbigniew Cierniak
DIRECTOR,
"ŚLĄSK" SONG AND DANCE ENSEMBLE



Culture

- region with a strong sense of ethnic identity
- around 1,400 cultural institutions and centers
- seat of the Polish National Radio Symphony Orchestra and of the “Śląsk” Song and Dance Ensemble
- Industriada — festival of the Industrial Monuments Route
- Beskid Culture Week — one of the oldest folk culture events in Poland

MULTICULTURAL AREA

The region is a multicultural area, shaped by the influences of its inhabitants of Polish, German, Czech and Jewish origin.

CULTURAL BASE

There is a strong cultural base in the voivodeship, supervised by 185 local self-government units. The organiser for 19 institutions is the Silesian Voivodeship, and there are also institutions run by the Silesian Voivodeship in cooperation with the Ministry of Culture and National Heritage (the Silesian Museum in Katowice and the Stanisław Hadyna Song and Dance Ensemble “Śląsk” in Koszęcin), with the City of Katowice (Silesian Freedom and Solidarity Center), with the City of Zabrze (Coal Mining Museum in Zabrze), and with the City of Cieszyn (Cieszyn Castle).

Among the cultural institutions organised by the local self-government of the Silesian Voivodeship, there are 5 artistic institutions, including 3 theatres: the dramatic **Stanisław Wyspiański Silesian Theatre in Katowice**, the musical **Entertainment Theatre in Chorzów**, and the Silesian **Opera in Bytom**. The **Polish National Radio Symphony Orchestra (NOSPR)** has its seat in the region, a building housing two concert halls with top-quality acoustics.

In 2015, **UNESCO** recognised Katowice as **Creative City** in the field of **music**.

SILESIA MUSEUM

The Silesian Museum, a significant part of which is located underground, referring to the industrial origins of the region, exhibits its collections using daylight **at a depth of over 13 metres**, thanks to the application of state-of-the-art architectural solutions.

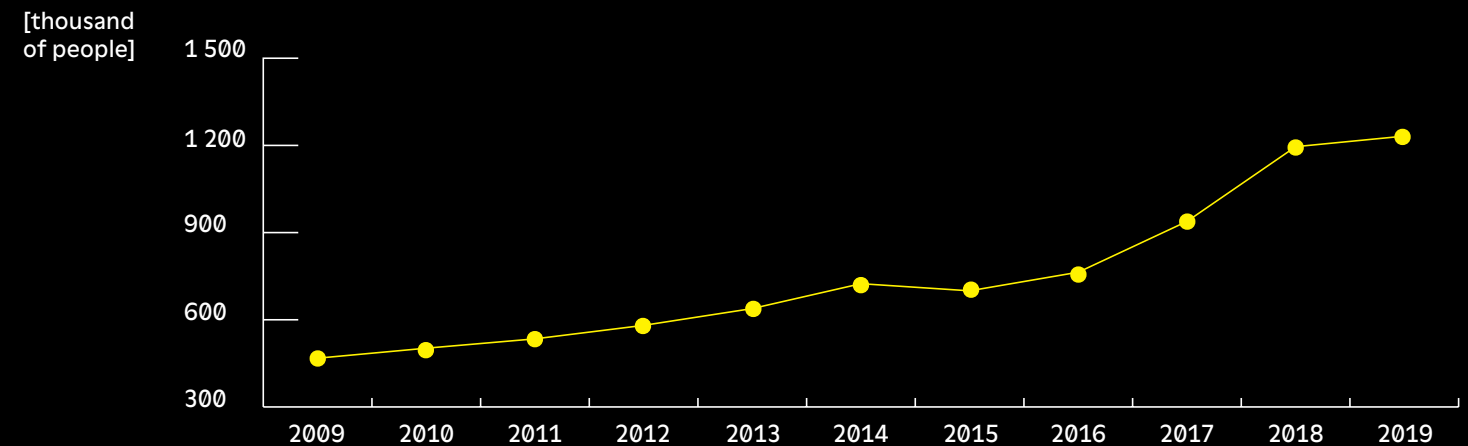
INDUSTRIADA

Industriada, the **festival of the Industrial Monuments Route**, is a great cultural event drawing on the industrial traditions of the region, as well as the most important celebration of industrial heritage culture in Central and Eastern Europe. Since 2010, a total of more than 750,000 people have enjoyed themselves, attending more than 3 thousand Industriada events. Over this time, the Industrial Monuments Route festival has managed to win the Gold Certificate for the best tourist product of 2016, awarded by the Polish Tourist Organisation. A year later, the Silver Mine and the Black Trout Adit in Tarnowskie Góry, which are also part of the Route, were entered on the UNESCO World Heritage List, and the Route itself extended the number of its landmarks from 36 to 42. Last year (2019), it recorded more than 1.2 million visitors. The prestigious European Heritage Award — Europa Nostra 2019 for the Queen Louise Adit in Zabrze makes it possible to assume that the number of tourists on the Industrial Monuments Route will keep growing in the coming years.

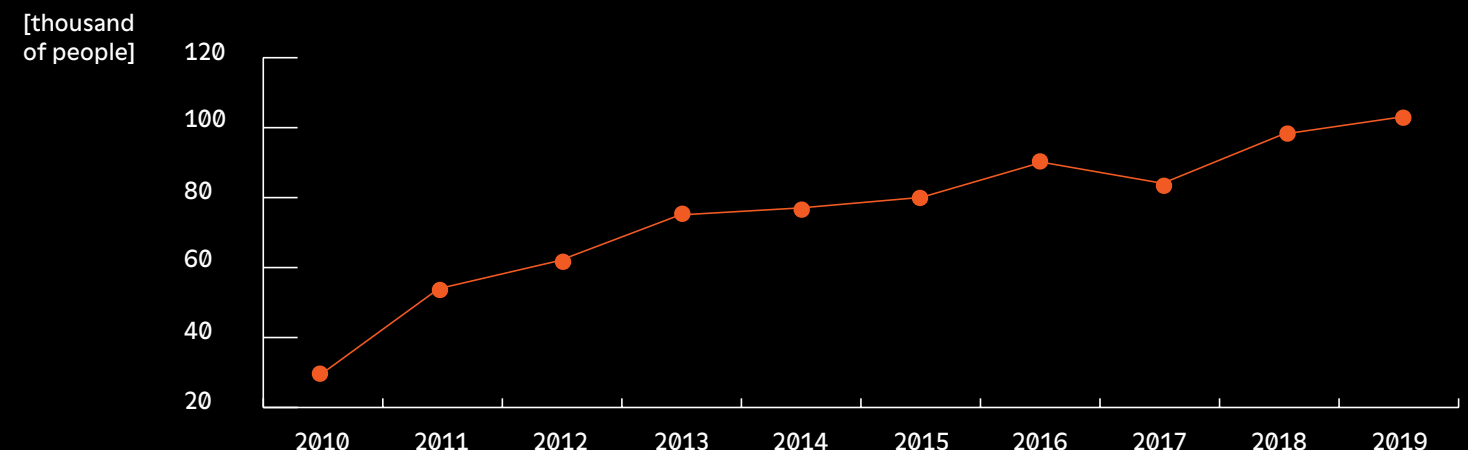
Number of visitors of the Industrial Monuments Route

■ number of visitors ■ number of participants

Attendance of events on the Industrial Monuments Route



Attendance during the Industriada festival

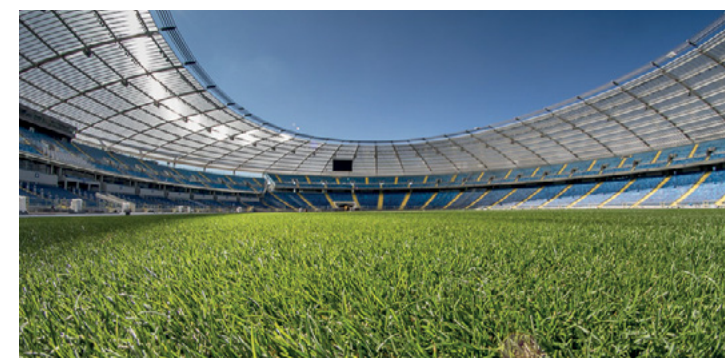




Region of great events

With all of its facilities, the Silesian Voivodeship has great potential for the development of business tourism. Nearly 1.3 million people visited the International Congress Center and the Spodek Arena in Katowice in 2019. Further prestigious events are planned in the coming years, which will definitely attract great interest, including the United Nations initiative IGF 2020 — global Internet Governance Forum.

Wojciech Kuśpik
PRESIDENT
PTWP S.A.V GROUP



Region of great events

- **International Congress Center — venue for international events**
- **Spodek Arena — a sports and entertainment hall in the center of Katowice, one of the region’s landmarks**
- **Silesian Stadium — one of the most widely-recognised stadiums in Poland**
- **Katowice — the world capital of e-sports**

Silesian Stadium — National Athletics Stadium arena for major cultural and sporting events

100,000

participants of the Silesian Stadium Open Day

47,000

audience during the New Year’s Eve concert

41,247

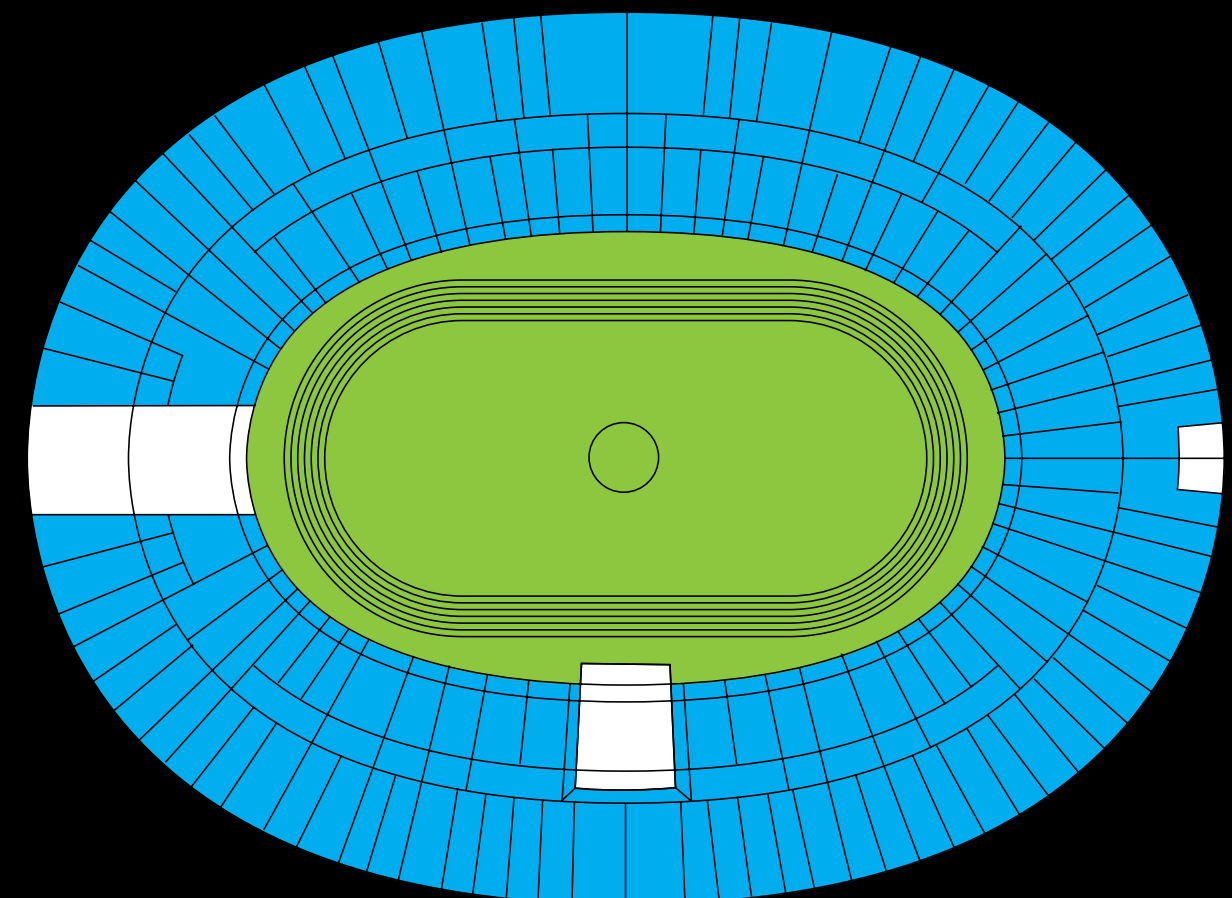
participants of the Dancing Silesia concert

38,879

spectators during the J. Kusociński and K. Skolimowska Memorial competitions

54378 — seats in the stands

85000 — capacity during music concerts



SILESIA STADIUM

The Silesian Stadium is one of the largest sports facilities in Europe. It is a venue for major international athletics championships. It is also a place of popular music and sporting events taking place in Poland. On an everyday basis, it provides space for smaller sports events, conferences, business meetings, training courses, and all kinds of other events held at the Conference and Business Center. The Silesian Stadium is a landmark and pride of the Silesian Voivodeship.

CULTURE ZONE

A manifestation of the substantial and spectacular changes that have taken place in the region in the recent years has been the establishment of a modern “Culture Zone” in the center of Katowice, in the area of the former “Katowice” Hard Coal Mine, comprising: the **International Congress Center (MCK)**, the **Polish National Radio Symphony Orchestra (NOSPR) concert hall**, the **Silesian Museum**, and **Spodek Arena**.

SPODEK ARENA

Sports and entertainment hall in the center of Katowice, called Spodek (Flying Saucer) due to its unique appearance, capable of accommodating more than **10 thousand people**, and known for large events on a national and international scale.

INTERNATIONAL CONGRESS CENTRE

The International Congress Center is a venue for conferences and business meetings (only in 2018, they included the 24th Conference of the Parties to the United Nations Framework Convention on Climate Change — COP 24, the European Economic Congress, and the 12th UNESCO Creative Cities Network Annual Meeting).

Cyclical events include: the **European Economic Congress** (organised uninterruptedly since 2009, one of the largest business events in Central Europe), the **European Start-up Days** (held since 2016 as an event accompanying the **European Economic Congress**), and the **European Congress of Small and Medium-Sized Enterprises** (organised since 2011).

Building a city's brand and image is not an overnight process. This laborious task requires one to proceed step by step. However, it is beyond any doubt that in the case of events such as the Climate Summit or Intel Extreme Masters, the largest business event in Poland, we can talk about leaps, rather than small steps. Another huge event is coming soon for us, the World Urban Forum, along with a number of cyclical conferences, congresses as well as sporting and cultural events. We obviously want to develop business tourism in Katowice and we will continue to do so.

Marcin Krupa
MAYOR
OF KATOWICE

MUSIC EVENTS

Big music events are organised in the Silesian Voivodeship, such as **Tauron Nowa Muzyka** (showcasing the best music, combining jazz, electronics and dance), **OFF Festival** (a music festival featuring broadly defined alternative music), and **Rawa Blues Festival** (the largest and one of the oldest blues festivals in Poland).

GLIWICE ARENA

One of the most modern sports and entertainment halls in Poland. In 2019, the **Junior Eurovision Song Contest** was held there.

SKI JUMPING

Wisła, the voivodeship's winter capital, is associated with the **Ski Jumping World Cup** which is held there.

INTEL EXTREME MASTERS

Intel Extreme Masters, one of the largest **e-sports** events in the world, attracting participants from all over the globe, is held in the region. E-sports is one of the most dynamically developing sectors, which can be proven by the creation of relevant subject-profiled classes in schools (for instance in Katowice, Piekary Śląskie, Jaworzno and Wisła), and even university courses related to this industry (post-graduate studies related to this sport are already available at the Academy of Physical Education in Katowice).

Culture Zone in Katowice

300

events at the International Congress Center (2019)

620,000

visitors at the International Congress Center (2019)

200

events in Spodek Arena (2019)

650,000

visitors at Spodek Arena (2019)

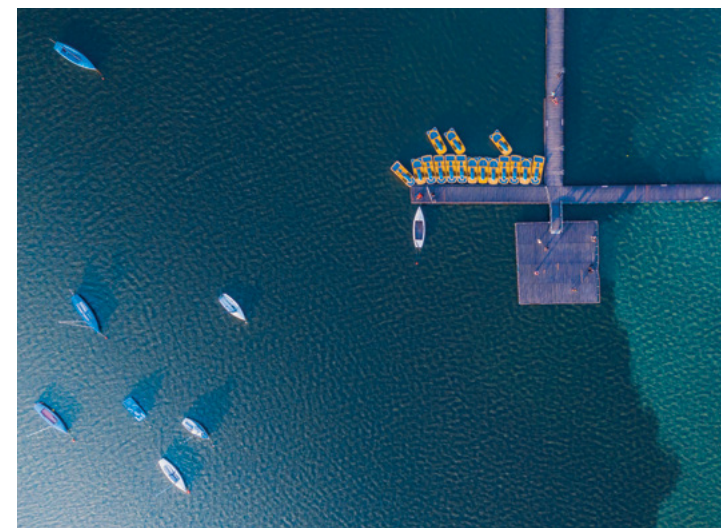




Tourism

***The Silesian Voivodeship is full of positive energy!
The diversified range of cultural and natural attractions
draws over 5 million tourists annually to the region.***

Adam Wawoczny
PRESIDENT
SILESIA TOURIST ORGANISATION



Tourism

- **the region abounds in tourist attractions**
- **Industrial Monuments Route — the only regional industrial tourism route in Poland**
- **Trail of the Eagles' Nests — trail of castles and fortresses in the Kraków-Częstochowa Jurassic Highland**
- **Szczyrk Mountain Resort — the largest ski resort in Poland**

The diversity encountered in the Silesian Voivodeship enchants tourists, who have been choosing the region increasingly often as a travel and leisure destination — in 2018, the number of tourists was almost **6 million**. There are cultural heritage treasures, a rich variety of landscapes, and an electrifying cultural and entertainment offering to be discovered here. The region strikes a perfect balance between beauty of nature and bustling big cities, and those who visit get a dose of truly positive energy, whether they pursue active leisure or seek peace and quiet.

TOURIST ATTRACTIONS

The biggest tourist attractions of the region include: the **Jasna Góra Pauline Monastery Complex in Częstochowa**; the **Trail of Eagles' Nests in the Kraków-Częstochowa Jurassic Highland**, which includes not only the castles, but also a number of other attractions, for instance for those who love bicycle trips, climbing and canoeing; the **Castle Museum in Pszczyna** — a Neo-Baroque palace with around 80% of the original furnishings from the late 19th/early 20th century preserved.

INDUSTRIAL MONUMENTS ROUTE

The Industrial Monuments Route — the flagship tourist and cultural product of the Silesian Voivodeship and the only route of its kind in Central and Eastern Europe, part of the **European Route of Industrial Heritage (ERIH)**. Particularly popular landmarks on the Route include: the **Żywiec Brewery Museum**, the **Tyskie Brewing Museum**, the **Museum of Coal Mining in Zabrze** and the **Historic**

Silver Mine in Tarnowskie Góry, entered on the **UNESCO World Heritage List** in 2017.

BESKID MOUNTAINS

Located in the southern part of the region. Culture enthusiasts will discover treasures of centuries-old history and tradition there. The villages of **Istebna, Koniaków and Jaworzynka** form the so-called **Beskid Triangle** — which is also a tripoint where the borders of Poland, Czechia and Slovakia meet. Known for cultivating traditional handicraft — sculpture, embroidery, woodcarving and the famous Koniaków lace. Hiking and cycling trails await active tourists in the Beskid Mountains, and in winter also well-prepared skiing routes.

SILESIA PARK

Larger than Central Park in New York and Hyde Park in London, it covers **620 hectares of green areas**, with the Amusement Park, the Zoo, the Planetarium, the Silesian Stadium, the Open-Air Museum, and several dozen other attractions. The park is the perfect place for leisure for the inhabitants of the urban agglomeration and tourists.

BUSINESS TOURISM

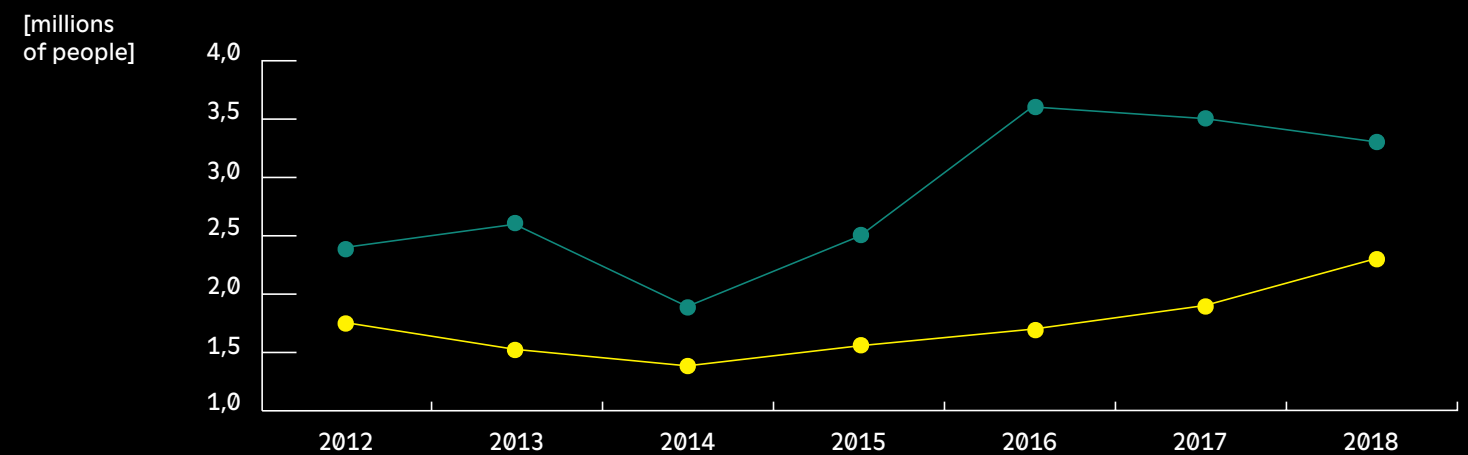
As a result of the progressing globalisation of the economy, business tourism, also known as the “meetings industry”, is becoming an important segment of the regional tourism market. This form of tourism is characterised by high profitability, as it relies mainly on higher-standard facilities (hotels) and uses high-quality services.

Tourism in figures

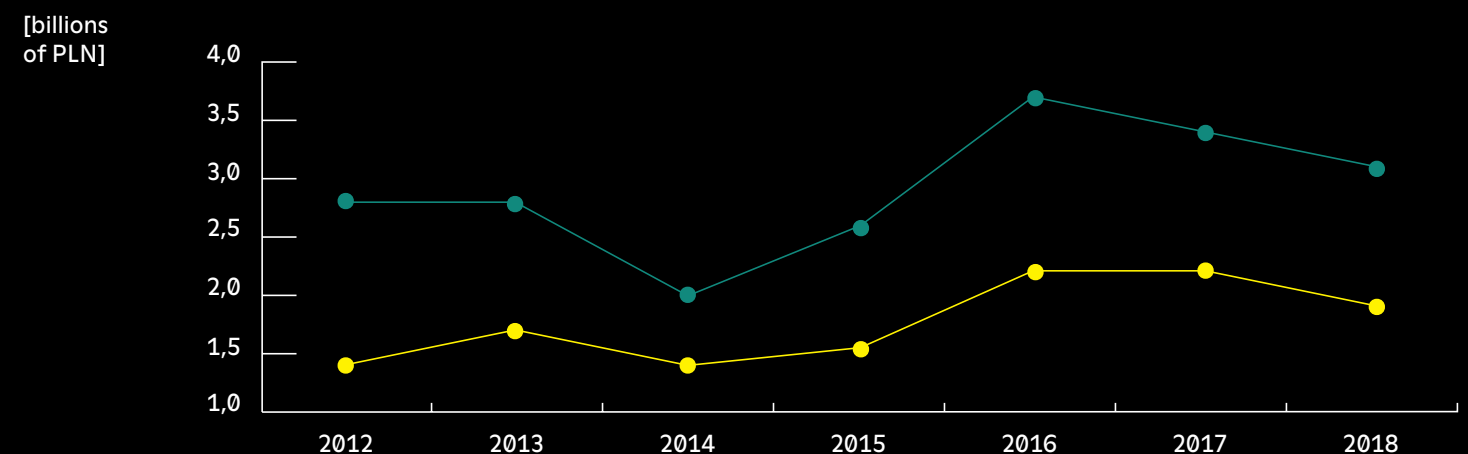
inbound tourism — tourists from outside the Silesian Voivodeship who have visited the Silesian Voivodeship

internal tourism — tourists who have travelled inside the Silesian Voivodeship

Estimated number of tourists



Tourist spending

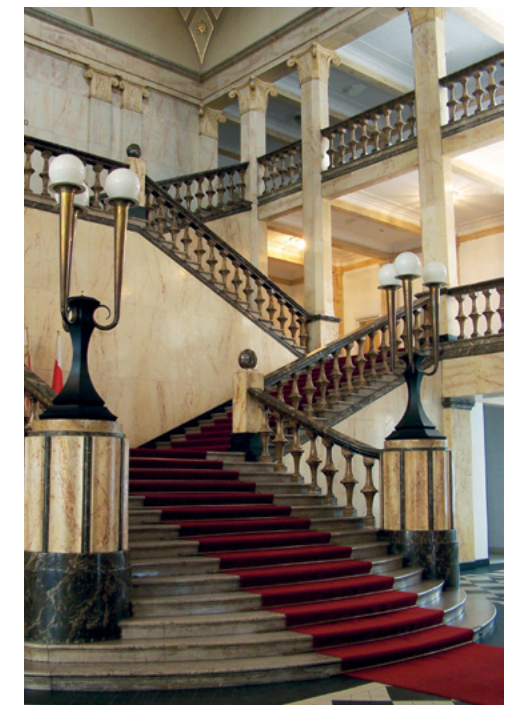




Silesian Investor and Exporter Assistance Center

Pursuing the mission of the Polish Investment and Trade Agency (PAIH), we work with our local partners and businesses in favour of implementation of investment projects in Silesia. We are glad that the Polish Investment and Trade Agency can contribute to the creation of modern infrastructure and business environment in the region, supporting entrepreneurs in their expansion into markets around the world. Products of Silesian companies have contributed to the development of branches of the economy such as the automotive industry and aviation, and they have also been influencing the health care, construction and power engineering sectors.

Grzegorz Słomkowski
MEMBER OF THE MANAGEMENT BOARD
POLISH INVESTMENT AND TRADE AGENCY PAIH S.A.



Silesian Investor and Exporter Assistance Center

- operates within the structures of the Marshal Office of the Silesian Voivodeship
- is a certified partner of the Polish Investment and Trade Agency — Polska Agencja Inwestycji i Handlu S.A. headquartered in Warsaw

The strengths of the Silesian Voivodeship include its excellent location, its strong economy, the excellently developed transport infrastructure, the highly qualified human resources, the well-functioning education system, as well as numerous research and development entities. The region's authorities have recently focused in particular on the development of entrepreneurship and on supporting investments based on high technologies and innovation, allowing the voivodeship to soon become the most modern economy in Poland. I therefore encourage you to find out more about our region, both in terms of investments and with regard to cooperation with local businesses.

Wojciech Kałuża
DEPUTY MARSHAL
OF THE SILESIAN VOIVODESHIP

The Silesian Investor and Exporter Assistance Center (ŚCOIE) operates within the structure of the Office of the Marshal of the Silesian Voivodeship and is a unit of the Department of Economy and International Cooperation.

The main task and objective of the Silesian Investor and Exporter Assistance Center involve economic promotion and support of the development of the Silesian Voivodeship by increasing the inflow of investments into the region and the level of exports from the voivodeship.

The Center's employees, working with various institutions, municipalities and counties across the region and with businesses operating in its territory, provide support with regard to export as well as investment activities.

The Center provides its services free of charge.

SUPPORT FOR EXPORTERS (EXAMPLES):

- searching for information in the available databases concerning potential business partners with regard to export or potential investments in a selected foreign market;
- providing information on export and investment conditions and determinants in foreign markets;
- providing information on active export support instruments in the financial, service and institutional areas;
- organising information and industry meetings and conferences for exporters concerning the conditions of export to foreign markets, as well as legal, tax, certification and labour law aspects;
- allowing Polish companies to display promotional materials at selected international trade fairs and exhibitions;
- providing contact details of foreign companies, forwarding requests for proposal from businesses interested in importing Polish goods, initiating cooperation with companies from foreign markets.

SUPPORT FOR INVESTORS (EXAMPLES):

- providing support services to Polish and foreign investors, including organising meetings with investors, providing information and data about the region, and forwarding investment offers;
- promoting investment offers in the area of the voivodeship;
- keeping a database of investment offers;
- supporting investors in contacts with local authorities, institutions and companies from the region;
- attending investment-related and economic events.



Silesian
Voivodeship



**MARSHAL OFFICE
OF THE SILESIAN
VOIVODESHIP**

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inSilesia

**SILESIAN INVESTOR AND EXPORTER
ASSISTANCE CENTER**



**Silesian
Voivodeship**




Invest
in Silesia