

Regional Trade Mission to Wroclaw and Lower Silesia, Poland

November 17 and 18, 2010

Poland is Ireland's 10th largest market for Irish indigenous exports and as part of Enterprise Ireland's strategy to generate export opportunities for Irish companies in the Polish market, a Trade Mission to the City of Wroclaw and Lower Silesia will take place on November 17 and 18. Wroclaw is Poland's 4th largest city, with a dynamic local economy, founded on a strong traditional industrial base, supplemented by a number of new and innovative sectors. The city and region has an enviable geographic position in terms of access, not only to the Polish market, but also to neighbouring markets in Germany, Austria, Slovakia and the Czech Republic.



The region has proven very attractive for Foreign Direct Investment (FDI) including: Volvo; Toyota; Siemens; Hewlett-Packard; Whirlpool; Nokia-Siemens; IBM; Electrolux; and Google.

Wroclaw is host to two signature events in the coming years, as one of four Polish host cities for the Euro 2012 Football Championships and as a European City of Culture in 2016.

The Trade Mission is designed to assist Irish companies seeking to enter the Polish market, companies already in the market, and members of the Irish investment community. In terms of opportunities for the Irish companies, the Trade Mission is will focus on developing business in the following sectors:

Construction /Engineering Services
Lifescience / Pharmaceuticals
Automotive Components
Business Process Outsourcing

Tourism Solutions and Services
ICT
Financial Services
Electronics and Household Appliances

Highlights of the Trade Mission will include:

- A seminar focused on business opportunities in Wroclaw and Lower Silesia with participation from local municipal authorities and business community;
- Dedicated meetings space for participants on November 17th and 18th
- Attendance at a Networking Reception, with a number of guests, on November 17th, with HE Ambassador Eugene Hutchinson as guest of honour.
- Reduced hotel rates in the Radisson Blu Hotel in Wroclaw (Euro 90 per night)

As part of our commitment to keep event costs as low as possible, the participation cost is 100 Euro (plus VAT). Participants may also book an itinerary of meetings with for a small extra cost. Wroclaw is accessible by direct Ryanair flights from Dublin or Shannon or by internal flights on LOT or Jetair from Warsaw, Krakow and Berlin

To book your place on the Trade Mission please go to
<https://www.eventsforce.net/enterpriseireland/296/register>
Please Read the Terms and Conditions Carefully



Regional Trade Mission to Wroclaw and Lower Silesia Programme (Provisional)

The following is a suggested format and timeline in terms of the operation of the Regional Trade Mission to Wroclaw

Participants will need to arrive in Wroclaw on the evening of November 16 or very early morning on November 17.

Day 1 – November 17

0900-1300 Trade Mission Opportunities Seminar

Opportunity for trade mission participants to get a detailed overview of business opportunities in Wroclaw and the Lower Silesia Region.

An opportunity will also be provided for participants to briefly introduce themselves to the audience

1400-1700 Individual Client Meetings and Itineraries

Enterprise Ireland has organized meeting space in the Radisson Hotel to allow companies to meet with potential partners and customers.

1830-2030 Trade Mission Networking Reception

With guest of honour, His Excellency Ambassador Eugene Hutchinson

Each participant will be entitled to invite a number of guests to the Reception.

Day 2 - November 18

0900-1300 Individual Client Meetings and Itineraries followed by possible partner site visits

Meeting space will be available in the Radisson hotel and EI will be facilitating clients that wish to make site visits to potential partners.

1300 Trade Mission ends

Sectoral Opportunities for Irish Companies in Wroclaw and Lower Silesia

Enterprise Ireland is focusing on opportunities in the following sectors as being the most prospective for Irish business:

- Construction and Engineering Services;
- Electronics and Household Appliances;
- Information and Communication Technologies;
- Lifescience / Pharmaceuticals;
- Financial Services / Business Process Outsourcing;
- Automotive Components;
- Tourism Related Products and Services;

• Construction and Engineering Services

Poland as a whole is undergoing a massive infrastructure build-out, which has seen many Irish general contractors, and specialist construction services companies enter the Polish market. Aside from the construction of motorways and rail lines, Poland is investing heavily in municipal infrastructure projects to upgrade and construction water and waste management facilities, secondary roads, and local transport infrastructure. In addition to local projects, Wroclaw and Lower Silesia has been attracting a very high share of Foreign Direct Investment in the form of new production facilities, which also have the potential to generate work for Irish companies in the construction and engineering services sector. The Regional Trade Mission will afford Irish companies the opportunity to get the latest information about projects in the region and to request meetings with representatives of municipal bodies and potential local partners.

• Electronics and Household Appliances

Lower Silesia is fast becoming a major European household goods production centre. Two large white goods manufacturers Whirlpool and Fagor Mastercook have production facilities in Wroclaw, while Electrolux and LG Electronics have production plants in the region. In addition, LG Philips LCD has a major production facility for its LCD screens and televisions. Irish companies are significant suppliers of components and services into the white goods and electronics sectors, and Wroclaw should be the radar for such companies

• Information and Communications Technologies

In Poland's Communist era, Wroclaw-based companies were leaders in the development and production of Eastern Europe's earliest computers. This tradition continues today and the region is home to a wide array of world leading companies that specialize in advanced software design who leverage the potential of the local market including: Capgemini, Nokia Siemens Networks, IBM, Microsoft, Opera Software. Along side these international players, local Polish software companies such as Winuel, Teta and Yuma have also expanded. Wroclaw will likely be of interest to many Irish software companies planning overseas development linkages, seeking to collaborate in

product development or who are looking to develop Poland as a sales and marketing platform from Eastern Europe.

- **Lifesciences and Pharmaceuticals**

Wroclaw has a significant lifesciences and pharmaceuticals sector. It also boasts an associated educational infrastructure, which underpins its aspirations in the sector, through the Wroclaw Medical University, the University of Wroclaw and the Technical University of Wroclaw. Lifesciences companies such as MacoPharma, US Pharmacia, Hasco-Lek and Herbapol have established in the city. Opportunities for Irish companies exist in the provision of analysis equipment, chemicals and reagents, and consulting services to the sector both in Wroclaw and as platform to sell into the rest of Poland. Poland's emerging lifesciences and pharmaceuticals sector has the capability of providing export opportunities for Irish companies that have sprung up to service foreign multinationals in the lifesciences and pharmaceutical sector that have established themselves in Ireland.

- **Financial Services / Business Process Outsourcing**

Wroclaw ranks second to Warsaw as a financial services centre, with 5 nationwide banks having established their headquarters in the city including: BZ WBK; BWE Bank; Lukas Bank; Eurobank; and Santander Consumer Bank. 16 Wroclaw based leasing companies' command 25% of the Polish leasing market. In addition, Wroclaw based companies hold a 60% share of the Polish debt collection market, while companies such as Volvo, HP and UPS use Wroclaw as the European accounting and administration centre. This local dynamic makes the city attractive to Ireland's growing cluster of companies servicing the financial services and BPO sector, both in terms of ICT solutions for the banking sector and systems designed to facilitate better efficiencies in back-office type functions.

- **Automotive**

Wroclaw has grown rapidly in recent years in terms of the development of its niche offerings in the automotive sector. Volvo has its main European bus manufacturing centre in the city and its global centre for the production of loaders. Toyota's investment in the region has resulted in a cluster of automotive component companies setting up in the region. Likewise Volkswagen has been producing engines in Polkowice (80km from Wroclaw) for many years. Major component manufacturers with operations in the region include AAM, Autoliv, Bosch, ETO, Magnetic, Faurecia, GKN, Matzeler, NSK, Takata-Petri and Wabco. Ireland has a small but active cluster of automotive component producers will likely be interested in potential opportunities in the city and wider Lower Silesia region.

- **Tourism Related Products and Services**

Wroclaw is a city with a rich culture and history and garners a significant number of inbound tourists annually. This has seen the built-out of tourism related infrastructure and services including hotels, restaurants, coffee shops

etc. The Euro 2012 Championship will further create opportunities for the delivery of innovative solutions and offerings in the catering sector. In parallel, opportunities exist for companies active in travel related ICT, both in the short-term in relation to 2012 and in the longer terms with respect to the Wroclaw's status as a 2016 European City of Culture.

Largest Foreign Investments in Wroclaw and Lower Silesia by Country of Origin

United Kingdom

Cadbury Wedel, PZ Cussons Poland, Vita Polymers Poland, BOC, Tesco, BP, GKN, Castorama;

USA

Whirlpool – Polar S.A., Wabco, PepsiCo, Gates Poland, Cargill, Mc Donalds, American Restaurants, PM Poland, HP, US Pharmacia;

Germany

Metro Group, Volkswagen, Siemens, Metzeler Automotive, Bosch, SCA Hygiene Products, Roeben, GKN, Quarzwerke, Parker Hannifin, Karosseriewerke Dresden, Uzin, Grossmann, Viessmann, Sitech, BDN;

France

Faurecia, Capgemini, Lukas Bank, EFL, Auchan, Carrefour, Geant, E'Leclerc, Decathlon, Brandt, Alstom;

Netherlands

SCA Molnlycke, Boart Longyear, 3M, Brugmann Fabryka Grzejników, Legri Polska, ZNUT FAEL, ZPEZ, QAD Polska;

Canada

McCain, Royal Europa, Bombardier Transportation Polska;

Japan

Takata Petri, Toyota Motor, Manufacturing Poland, Toyota Motor Industries Poland, AKS, Yagi, Nifco, Daicel, TBMeca, NTK;

Spain

Fagor, Antolin, Santander, CorpuPolska;

Korea

LG Electronics



Travel and Accommodation

Accommodation

Enterprise Ireland has arranged for a group room rate at the Radisson Blu Hotel in Wroclaw <http://www.radissonblu.com/hotel-wroclaw> during the course of the Trade Mission.

The cost of a single room with breakfast will be 400 Polish Zloty per night (about Euro 91 at current exchange rates). Participants will be required to book the hotel directly and to pay for their accommodation costs directly.

Transport

Flights

Ryanair - Ryanair flies to Wroclaw directly from Dublin and Shannon

Wednesday, November 16 FR1926 Departs Dublin at 17.10 and arrives Wroclaw at 20:50

Friday, November 18 FR 1927 Departs Wroclaw at 20.45 and arrives Dublin at 22.30

Additionally, on Friday, November 18th, Ryanair flight FR 1173 departs Wroclaw for Shannon at 18.30.

As of mid-September, the cost of a return Ryanair flight to Wroclaw with one piece of checked luggage was approximately 100 Euro.

Aer Lingus – Aer Lingus flies daily to both Warsaw and Krakow from Dublin daily.

From Warsaw there are many daily flights to Wroclaw on LOT www.lot.com and Jetair www.jetair.pl Promotion fares in Jetair were as little as 30 Euro return if pre-booked in September.

Flight time from Warsaw to Wroclaw is about 50 minutes. Travel by train from Warsaw to Wroclaw can take up to 7 hours.

Visa and Passport

Please ensure that your passport is in date prior to travelling. Poland is part of the EU and no visa is required for EU citizens. Other nationalities should check possible visa requirements in advance of the Trade Mission.