

In Metropolis GZM. Business

ECONOMIC BULLETIN OF METROPOLIS GZM

NO. 1/2021

PREFACE



Dear Reader,

we give you the first issue of economic bulletin "In Metropolis GZM. Business". Once a quarter, we are going to present materials regarding the development projects run in Metropolis GZM, which associates 41 cities and municipalities located in the central part of the Silesian voivodeship. In this way, we want to bring you closer to the potential of our conurbation inhabited by over 2 million residents who change it for the better with their creativity and everyday work. Thanks to them, we look boldly towards modern branches of industry and economy. We hope that this bulletin's data will help you make decisions about your investments' location or their further development. The first issue is a summary of the twelve difficult months of 2020 and an opening balance of 2021. Our ambition is to prepare an interesting and reliable material. We are open to your comments and suggestions. Please do not hesitate to contact us. Metropolis GZM really is a very good address. Enjoy your reading.

Kazimierz Karolczak

Chairman of the Board, Metropolis GZM

Metropolis GZM - the first metropolis in Poland. GZM includes 41 cities and municipalities with approx. 2.3 million people. It spans over 2,500 sq km, where modern technology related to the automotive, IT or medical industries (among others) develop alongside the traditional industry. Metropolis GZM is a platform for wide-ranging co-operation, aimed at improving the quality and the comfort of life of its residents.



Partner



Metropolis^{GZM}

Metropolis GZM is going to create one of the largest open data platforms in Poland



Over 1,700 data sets were inventoried in 28 GZM's municipalities which took part in the project. Everyone will be able to use them – the residents, entrepreneurs, investors, scientists and non-governmental organisations.



Watch more about Metropolis GZM Open data platform



You can use the functionality of the portal now. The initial version of the platform was published in 2019.

The record year of Katowice Special Economic Zone and even more new products

The year of 2020 was a record one in the last 20 years for Katowice Special Economic Zone (KSSE S.A.). 57 new investment projects worth over PLN 4.9 billion, to create 1,500 new jobs. Again, KSSE S.A. became the best economic zone in Poland.



Watch more about the record year of Katowice Special Economic Zone

INVESTMENTS 12 MONTHS OF 2020

80.7%

POLISH CAPITAL

5.3%

GERMAN CAPITAL

EACH

3.5%

ENGLISH, ITALIAN CAPITAL

EACH

1.75%

DUTCH, CHINESE, SWEDISH, AMERICAN CAPITAL

INDUSTRIES 12 MONTHS OF 2020

15.8%

POLISH CAPITAL

EACH

14.1%

AUTOMOTIVE, CONSTRUCTION

EACH

8.8%

MACHINERY

EACH

7%

PAPER, PLASTIC

5.2%

FOOD

EACH

3.5%

FURNITURE, ELECTRIC, IT

EACH

5.2%

CHEMICAL, TRANSPORT, BPO, ENERGY, GLASS PRODUCTS, MEDICAL, POLYGRAPHIC, RECYCLING, WOOD PROCESSING AND OTHER

Investment projects in GZM in Q1 2021

TOWN/CITY	INVESTOR	INDUSTRY	VALUE OF INVESTMENTS IN PLN OR INVESTMENT SIZE	NUMBER OF NEW JOBS	OTHER DATA
Dąbrowa Górnicza	Instanta	Food	PLN 55 mil	50	—
Katowice	BOS Innovation and Technology Center	Automotive	—	60	—
Czeladź	OTCF S.A. owner of 4F brand	Distribution centre in BTS formula (a warehouse facility, designed and built for a dedicated recipient)	Target surface of 67,000 sqm. In the first stage, over 40,000 sqm of surface were prepared.	—	The distance from this new investment to A4 motorway is 12 km, and 15 km to A1. Katowice International Airport in Pyrzowice is located 21 km away.
Chorzów	In-Post	Logistics centre in the premises of Prologis Park Chorzów	6,000 sqm	—	The facility is located in the vicinity of A4 "Chorzów Batory" junction and is very well connected with A1 motorway.
Dąbrowa Górnicza	JSW Koks S.A.	Manufacturer and exporter of coke	PLN 648 mil	—	—



Source: own elaboration based on "Centrum prasowe Katowickiej Specjalnej Strefy Ekonomicznej S.A."



Source: own elaboration based on "Panattoni Europe Polska".



Source: own elaboration based on "Kolejne centrum logistyczne InPost".

SK IE Technology to invest PLN 3.9 billion in Katowice Special Economic Zone S.A. in Dąbrowa Górnicza



Photo by Dariusz Nowak, Dąbrowa Górnicza City Hall archives



Source: "SK IE Technology to make the largest ever investment in separator plants in Poland".



Source: "SK zwiększa inwestycje do 7 mld zł".

The Korean SK IE Technology has announced the construction of two more factories of separators for batteries used in electric vehicles. New plants are to be established in the premises of Katowice Special Economic Zone S.A. in Dąbrowa Górnicza, where work on the construction of the investor's first two factories is currently carried out. The value of investment is PLN 3.9 billion. It is going to be the world's largest production plant of this Korean concern.

Construction of a production and warehouse hall of the Asian investor has started in Bieruń

TENGLONG POLSKA S.A. has started construction of a production and warehouse facility at Strefowa street in Bieruń. The project, worth PLN 100 million, is being implemented on a plot of land of 4 ha. The investment will result in the creation of 600 jobs.



Source: own elaboration based on "Azjatycki inwestor rozpoczął budowę dużego zakładu w KSSE w Bieruniu".

Metropolis GZM and its capital Katowice is one out of five most important centres for the development of modern services sector

According to the report "Sektor nowoczesnych usług biznesowych w Katowicach" (Modern business services sector in Katowice), prepared by the ABSL (the Association of Business Service Leaders), Katowice and GZM is one of the five most important centres in Poland where the modern business services sector account for 3.0–3.5% of the GDP of Poland. In the last four years, there has been an increase by almost 70% in employment in business services centres in Katowice and GZM. The main category of services provided in these centres are IT services (43.3% of the total number of employees), followed by SSC/GBS (33.1%), BPO (12.3%), R&D (3.7%) and other (7.6%). As assumed by the experts, the sector in Katowice will continue to develop dynamically – there are 27,000 people employed in the centres now and the forecasts are that the number of employees is going to exceed 28,500 people in 2021.

In Katowice and Metropolis GZM, there are 114 operating modern business service centres from 19 countries (as many as 90 in the capital of the Metropolis).



Source: own elaboration based on the ABSL report "Modern business services sector in Katowice".

Katowice as the fourth largest office market in Poland

In 2020, there were 61,300 sqm of new surface commissioned in 4 office projects. The demand for new office spaces amounted to 65,000 sqm of surface area in 2020. According to the estimates, approx. 190,000 sqm of modern office space will be commissioned by 2023 in Katowice. The two largest projects are being implemented in the capital of Metropolis GZM: Global Office Park complex (55,100 sqm), implemented by Cavatina Holding and KTW II carried out by TDJ Estate (42,000 sqm). According to specialists from this sector, the rates of rent will remain stable. In new buildings, they are at the level of EUR 13.5 to EUR 15.5 EUR for a sqm per month, and approx. EUR 9–12 for a sqm per month in B class projects.



Source: own elaboration based on "Mimo pandemii w Katowicach powstają nowe projekty biurowe".



Download the report in Polish and English

GZM companies among the fastest developing in Europe

BrainHub from Gliwice, Skyrise.tech from Katowice and Holding Piga.pl from Tychy ranked among the 1000 fastest growing companies according to Financial Times.

COMPANY	RANK	SECTOR
BrainHub	249	Software
Skyrise.tech	549	Information technologies and services
Holding Piga.pl	681	Wall decor



Source: own elaboration based on "Trzy śląskie firmy w rankingu FT 1000 - najszybciej rosnących firm w Europie".

Companies from Metropolis GZM ranked among Poland's Best Employers 2021 by "Forbes" magazine

The companies operating in the Metropolis are ranked among the 300 Poland's Best Employers 2021 by "Forbes" magazine. The list was based on the opinions of the employees. **The study was carried out from September to October 2020 on a sample of approx. 1800 employers that hire at least 250 employees in Poland.**

INDUSTRY	COMPANY	HEAD OFFICE	RANK IN THE INDUSTRY	RANK IN THE LIST
Wholesale trade	Saint-Gobain	Dąbrowa Górnicza	1	125
Healthcare and social welfare	BetMed	Chorzów	2	141
Retail trade	ALDI	Chorzów	23	215
Banks and financial services	ING Bank Śląski	Katowice	1	7
Transport and logistics	CTL Logistics Tramwaje Śląskie	Sosnowiec Chorzów	2 20	26 188
Education and research	University of Economics in Katowice University of Silesia in Katowice	Katowice	3 9	43 93
IT, internet, software, computer games and computer service	Sopra Steria	Katowice	10	157
Oil and gas extraction, mining, chemical industry	Polska Grupa Górnicza	Katowice	7	198
Pharmaceutics and biotechnology	Farmacol	Katowice	2	101
Manufacturing and processing of raw materials, building materials, metal and paper	Saint-Gobain ArcelorMittal	Dąbrowa Górnicza	3 4	125 129
Power engineering and public utilities	TAURON Group	Katowice	4	130
Construction	Mostostal Zabrze	Gliwice	7	132
Automotive industry and other means of transport (contractors, subcontractors, sales)	NGK Ceramics Brembo Nexteer Automotive Auto Partner Lear Corporation Magnet Marelli	Gliwice Dąbrowa Górnicza Tychy Bieruń Tychy Katowice	4 8 10 16 20 24	127 172 206 250 271 279
Other services (human resources, real estate, call centres and other)	ERA	Chorzów	9	196



Source: own elaboration based on "Praca w tych firmach to 300 radość. Ranking Poland's Best Employers 2021".

New recruitment projects in Metropolis GZM



COMPANY	NUMBER OF NEW JOBS	AREA/SPECIALISATION
Capgemini	200	IT specialists and experts
ArchiDoc	120	Credit application centre for banks
Honeywell	>100	Production of warehouse automation systems
Sopra Steria Polska	300	Cloud technologies, operating systems, databases, application support

Source: own elaboration based on:

- “Capgemini chce zatrudnić w Katowicach kolejnych 200 osób”,
- “ArchiDoc otwiera centrum obsługi wniosków kredytowych dla banków”,
- “Honeywell inwestuje w Chorzowie. Zatrudni ponad 100 osób”,
- “Sopra Steria Polska zatrudni ponad 300 nowych pracowników w Katowicach”.

REGISTERED UNEMPLOYMENT RATE - GZM DISTRICTS WITH THE LOWEST AND HIGHEST UNEMPLOYMENT RATE RELATIVE TO THE SILESIA VOIVODESHIP AND POLAND - JANUARY 2021

Katowice

min.	
01.2021	1.8%
12.2020	1.7% (0.1 pp) =
01.2020	1.1% (+0.7 pp) ↑

Bytom

max	
01.2021	10.4%
12.2020	10.1% (+0.3 pp) ↑
01.2020	8.8% (+1.6 pp) ↑

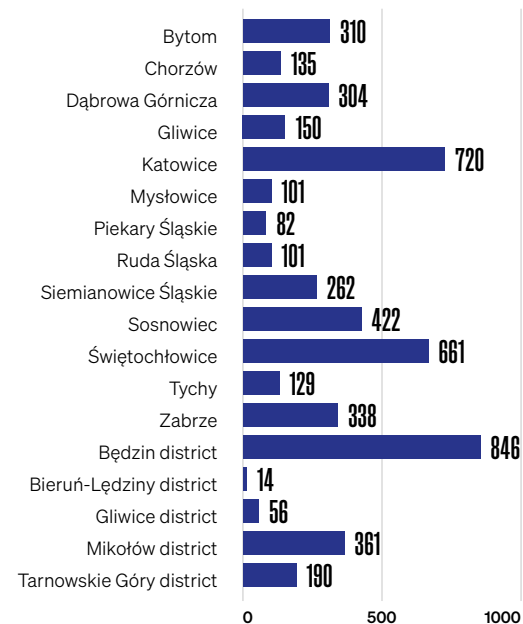
Silesian voivodeship

01.2021	5.1%
12.2020	4.9% (+0.2 pp) ↑
01.2020	3.9% (+1.2 pp) ↑

Poland

01.2021	6.5%
12.2020	6.2% (+0.3 pp) ↑
01.2020	5.5% (+1.0 pp) ↑

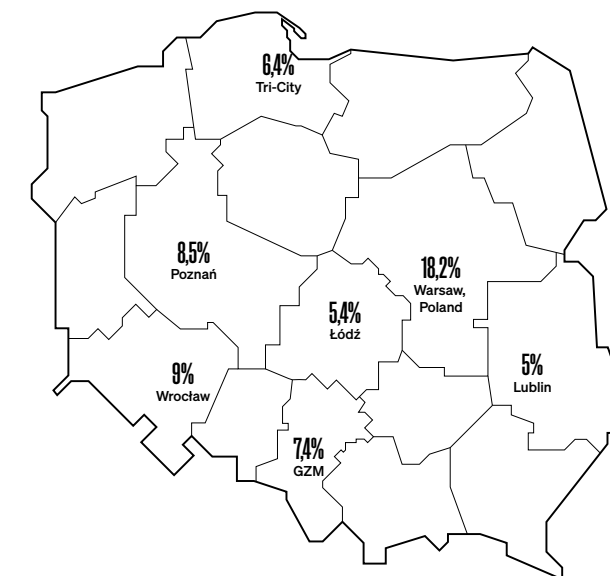
NUMBER OF JOB OFFERS AS OF THE END OF JANUARY 2021



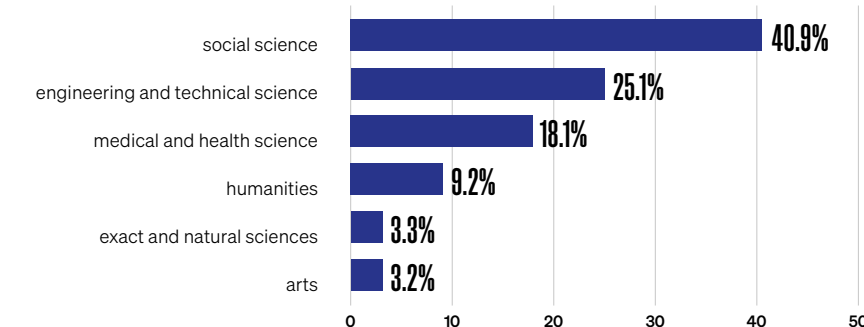
Source: Metropolitan Socio-Economic Observatory.

Report on students and universities in GZM

As implies from the report “**Studenci i uczelnie wyższe na terenie GZM**” (Students and universities in GZM), prepared by the Department of Strategy and Spatial Policy of the GZM Metropolitan Office, there were 18 universities and 6 branches (branch faculties), located in 7 cities, 8 of which were public and 16 were non-public universities, in the Metropolis in the academic year of 2019/2020. There were 88,900 students in GZM in the academic year of 2019/2020, which accounted for 79.1% of students of all universities in the Silesian voivodeship and 7.4% of students in Poland. The largest share of the number of students in the country in 2019 was in Warsaw (18.2%), followed by Kraków (10.8%), Wrocław (9%) and Poznań (8.5%). However, GZM was ranked ahead of the Tri-City (6.4%), Łódź (5.4%) and Lublin (5%).

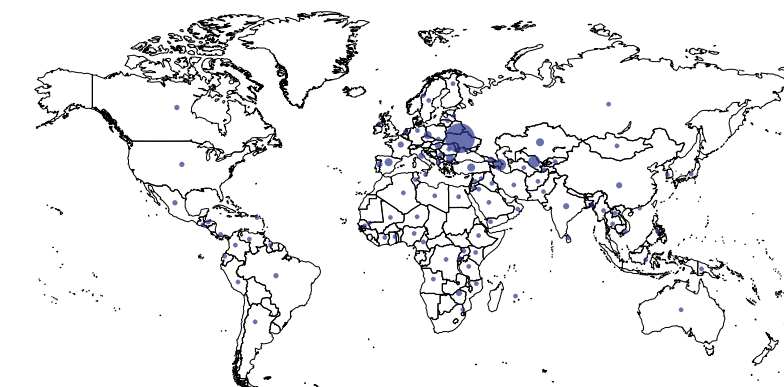


PERCENTAGE OF STUDENTS BY THE FIELD OF EDUCATION IN THE ACADEMIC YEAR OF 2018/2019 OR 2019/2020



Moreover, the results of the report show that the universities located in GZM are popular mainly among the residents of the Silesian voivodeship – they account for 80% of the students. The second group of students in the Metropolis comes from the neighbouring voivodeships: Małopolskie (9.2%), Świętokrzyskie (1.8%) and Opolskie (1.7%). It is associated both with a temporary stay and with a chance for at least a gradual improvement of the demographic situation in the region. Other interesting information contained in the study concerns the country of origin of foreigners studying in the Metropolis. Foreign students in GZM came from as many as 100 countries. Most of them have arrived from Ukraine in recent years. The greatest diversity in the academic year of 2019/2020 was observed in the Silesian University of Technology, whose students came from 54 countries. In the same academic year, the Medical University of Silesia educated students of 50 nationalities. Most of them came from Ukraine, Israel and Belarus.

FOREIGN STUDENTS IN THE ACADEMIC YEAR 2018/2019



Source: report “Studenci i uczelnie wyższe na terenie GZM”.



Strategic co-operation of the University of Economics in Katowice with TMF Group's European Centre

The co-operation of the global company with the University of Economics in Katowice is a result of, among other things, great results achieved by graduates of the university in the structures of TMF Group. The Polish branch of TMF Group - with its offices in Warsaw and Katowice, where TMF Group's European Centre is now being opened - employs almost 500 people and is one of the largest branches of TMF Group in the region of Europe, the Middle East and Africa (EMEA). Over 60% of companies listed in Fortune Global 500 and FTSE 100 and nearly half of the world's 300 largest private equity companies use the services of TMF Group.



Source: own elaboration based on "Europejskie Centrum TMF Group rozpoczyna strategiczną współpracę z UE Katowice", University of Economics in Katowice.

First projects with co-financing of the Metropolitan Science and Education Support Fund

The level of educational offer of universities in GZM is very important for the development of the Metropolis. The offer is intended to encourage students to study and connect their future with the Metropolis. It is also a good sign for investors that they can count on qualified staff with great potential of professional development. The aim of the Metropolitan Science Support Fund is to support universities. Owing to the subsidies obtained from the fund, they can invite outstanding scientists from the best academic centres in the world.

NUMBER OF PROJECTS GRANTED FUNDS IN 2020	VALUE OF GRANTS AWARDED	UNIVERSITY OF THE SCIENTIST INVITED
3	almost PLN 84,000	<ul style="list-style-type: none"> University of California San Diego Auckland University of Technology University of Oxford

NUMBER OF PROJECTS TO BE IMPLEMENTED IN 2021 (AGREEMENTS SIGNED+PROJECTS SUBMITTED)	VALUE OF GRANTS APPLIED	HOME UNIVERSITIES/AWARDS OF GUESTS INVITED
8	almost PLN 680,000	<ul style="list-style-type: none"> University of California San Diego Harvard University University of Cambridge Pulitzer Prize

Source: own elaboration

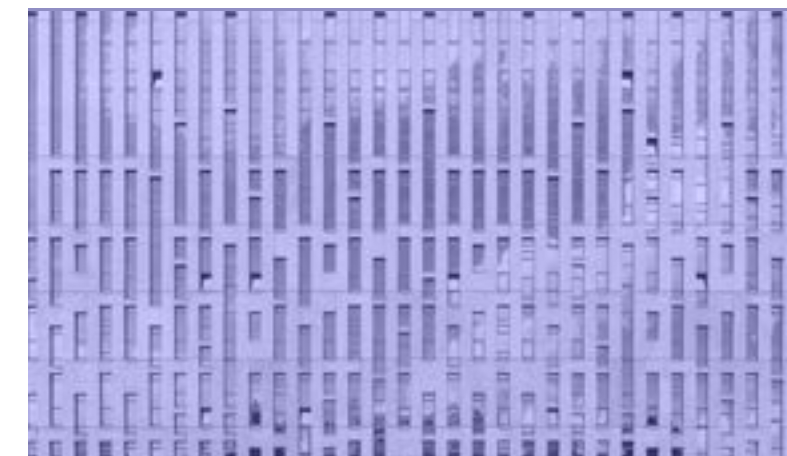
The Metropolis GZM to improve the quality of life of its residents



The action programme aimed at reducing low-stack emissions (PONE) and the Metropolitan Solidarity Fund are two financial instruments supporting the projects of cities and municipalities in GZM intended to eliminate the differences in the socio-economic development and to improve the quality of life of the residents. They are fully funded by Metropolis GZM.

FINANCIAL INSTRUMENT UNDER IMPLEMENTATION	VALUE OF FINANCIAL SUPPORT IN 2020	NUMBER OF INVESTMENTS IMPLEMENTED IN 2020	BUDGET FOR 2021
ACTION PROGRAMME AIMED AT REDUCING LOWSTACK EMISSIONS	PLN 74 mil	125	PLN 30 mil
SOLIDARITY FUND	APPROX. PLN 15 mil	42	OVER PLN 13 mil

Four cities in GZM set up a company to build apartments



Chorzów, Tarnowskie Góry, Świętochłowice and Zabrze, together with the National Real Estate Resource (KZN), intend to establish a company, Silesia Social Housing Initiative. Its task is to build comfortable apartments available to those people cannot afford a bank loan even though they work. New apartments will be built in each of these cities. In Chorzów, they are to be located on a plot of land belonging to the State Treasury, at Michałkowska street, on the border with Siemianowice Śląskie. The planned amount of apartments in the housing estate is 1,200.



Source: own elaboration based on "W Maciejkowicach powstanie nowe osiedle", Chorzów City Office.



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