

Semicon Europa 2024, Munich



CEE: Future Location of Semiconductor Investments

we care more

14 years of FDI attraction

209

Investment projects completed

1,608

Investment inquiries handled

24,705

New workplaces generated

We develop an investor service system **to attract new investments**, **stimulate the creation of new jobs** in the region, and **strengthen its competitive position** and resistance to economic shocks.

Pomerania - Economic overview

21.3%

GDP growth YoY
(2022)

2nd

Workplaces created
by FDI in Europe (2011-2016)

5th

fDI's Mid-Sized European Region
of the Future 2022/23 -
FDI Strategy

2.3 mln

Inhabitants



Priority sectors



The World Bank identified key areas for further strengthening, highlighting the semiconductor sector's significant growth potential for the Pomeranian region's future development.

European Current Outlook

Regional semiconductor capex forecast, \$B USD, 2022-2027E



Since 2021 12 big projects (front-end/back-end) have been announced in Europe, mainly in **Germany, France, and Italy***

EMEA forecast to account for **~14% of global semiconductor capital** expenditures through 2027

Talent Shortage



Calling all foreign workers! The German chip sector’s run into a labour problem

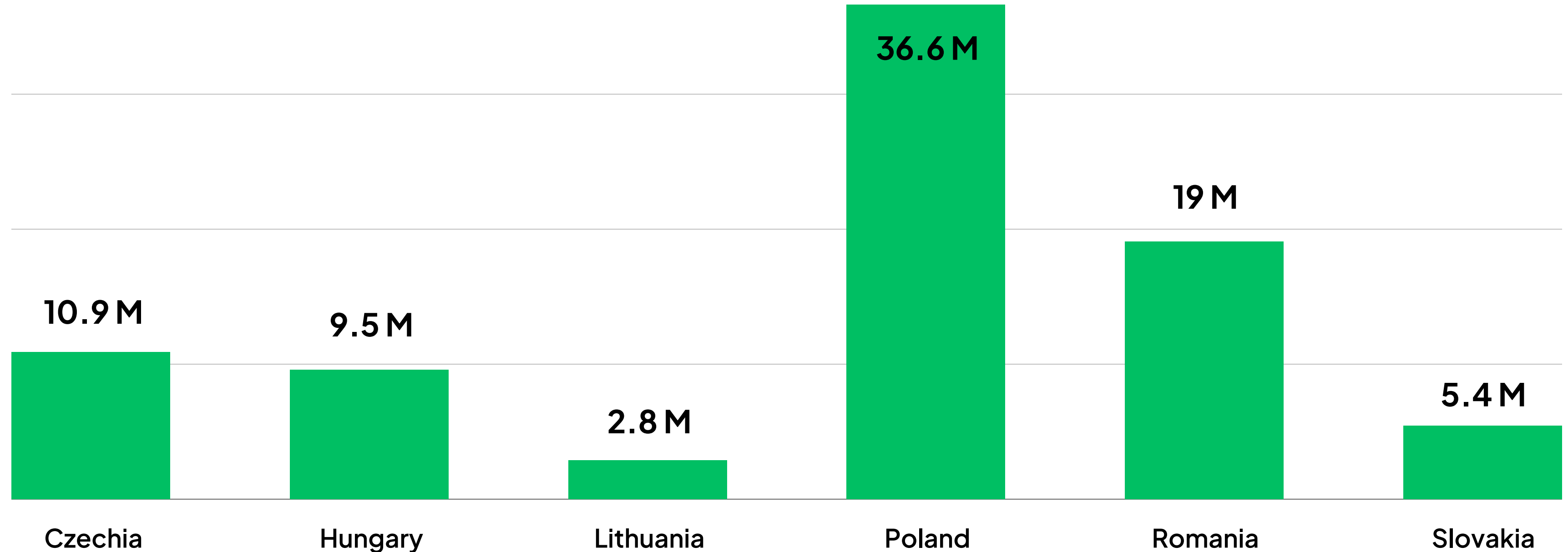
The state has pulled in billions in investment, and fabrication plants, or “fabs,” for companies such as Infineon, Bosch and Globalfoundries are all based in Saxony, which is rumored to be the site of a future TSMC plant.

Source: Financial Times/ Economic Times

New location for design, back-end and supply chain

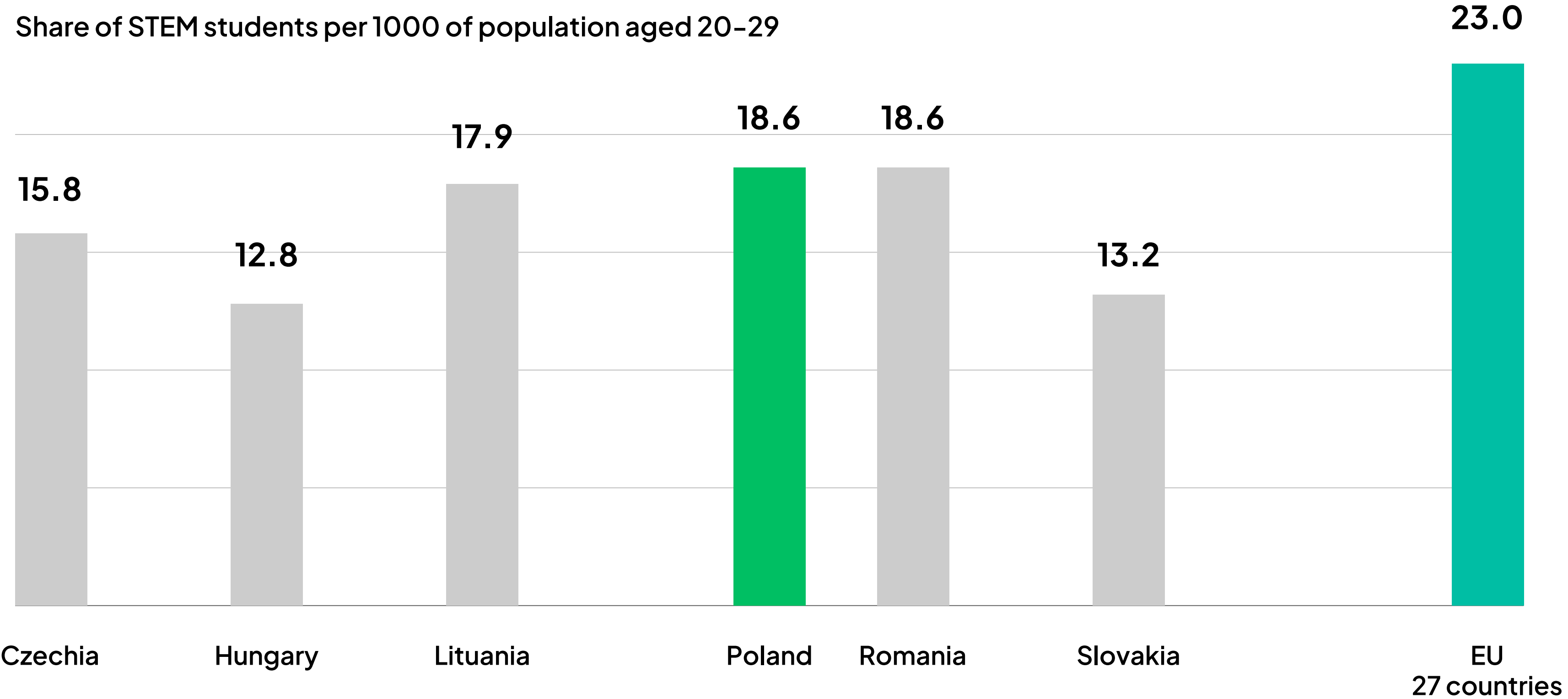
CEE population

Total: ~85 MLN people



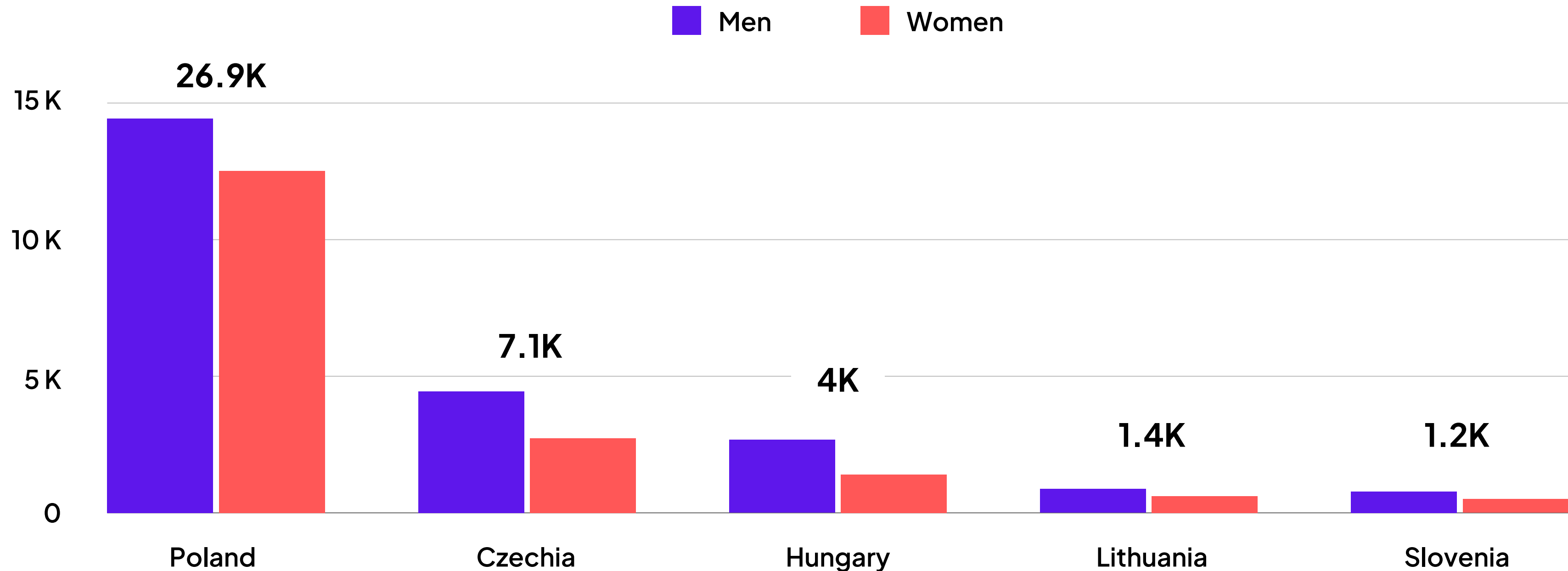
STEM Talent Pool

Share of STEM students per 1000 of population aged 20–29



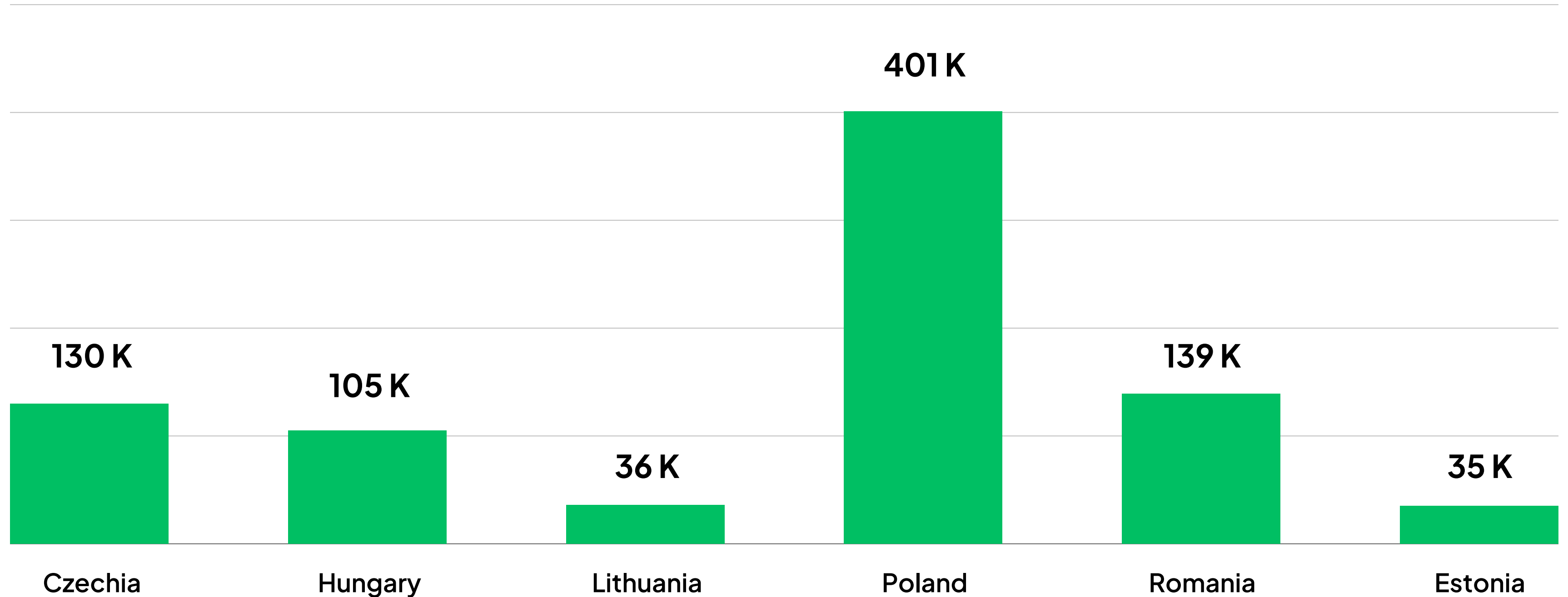
Source: Eurostat

New tertiary graduates in STEM as a share of new graduates (OECD, 2021)

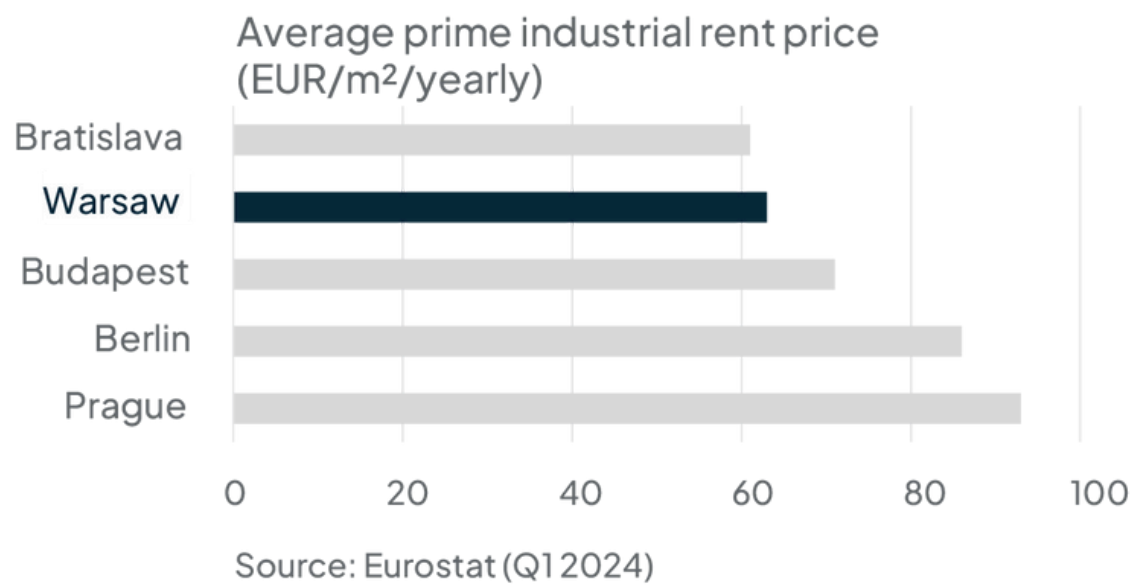
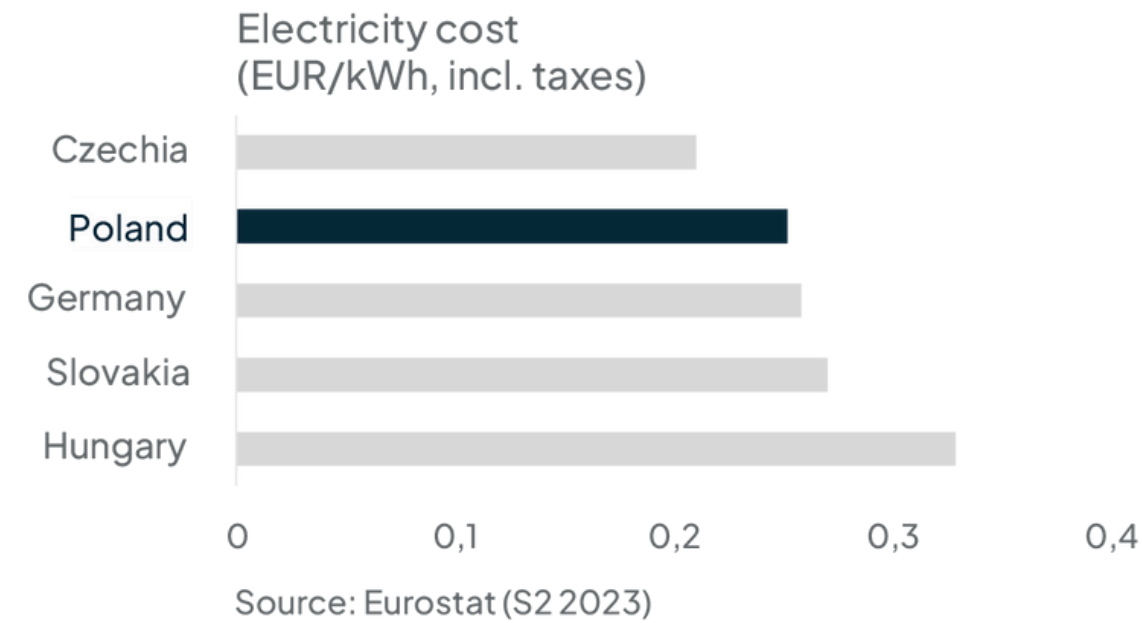


Source: The OECD Going Digital Toolkit, based on the OECD Education Database

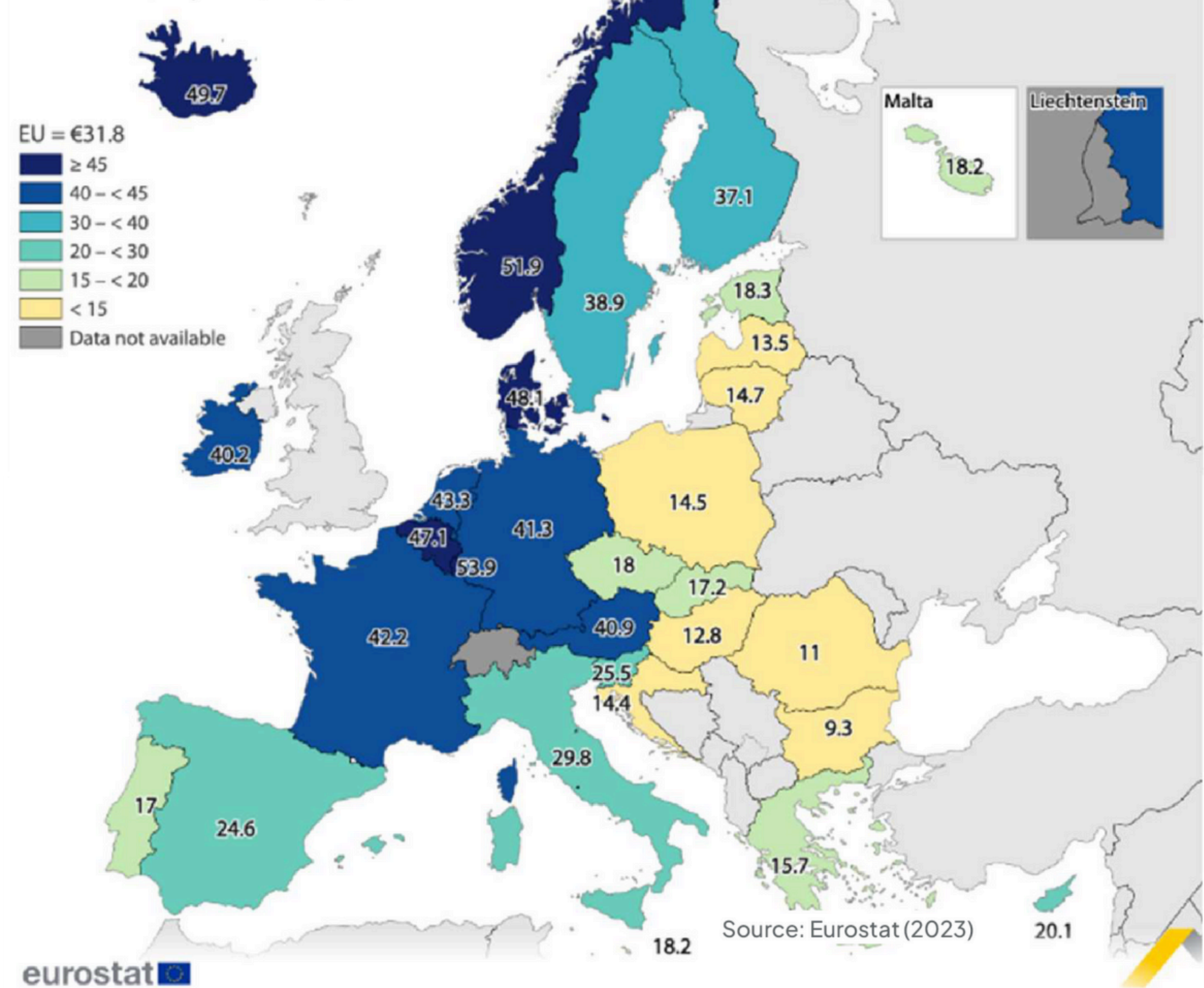
Software developers in CEE



Cheaper than you expect



Hourly labour costs, enterprises with 10 or more employees (EUR/h)



Going sustainable

Offshore Wind

6.4 GW

current energy
production capabilities (2026)

24 GW

energy production capabilities
by 2040 (estimation)

Nuclear energy

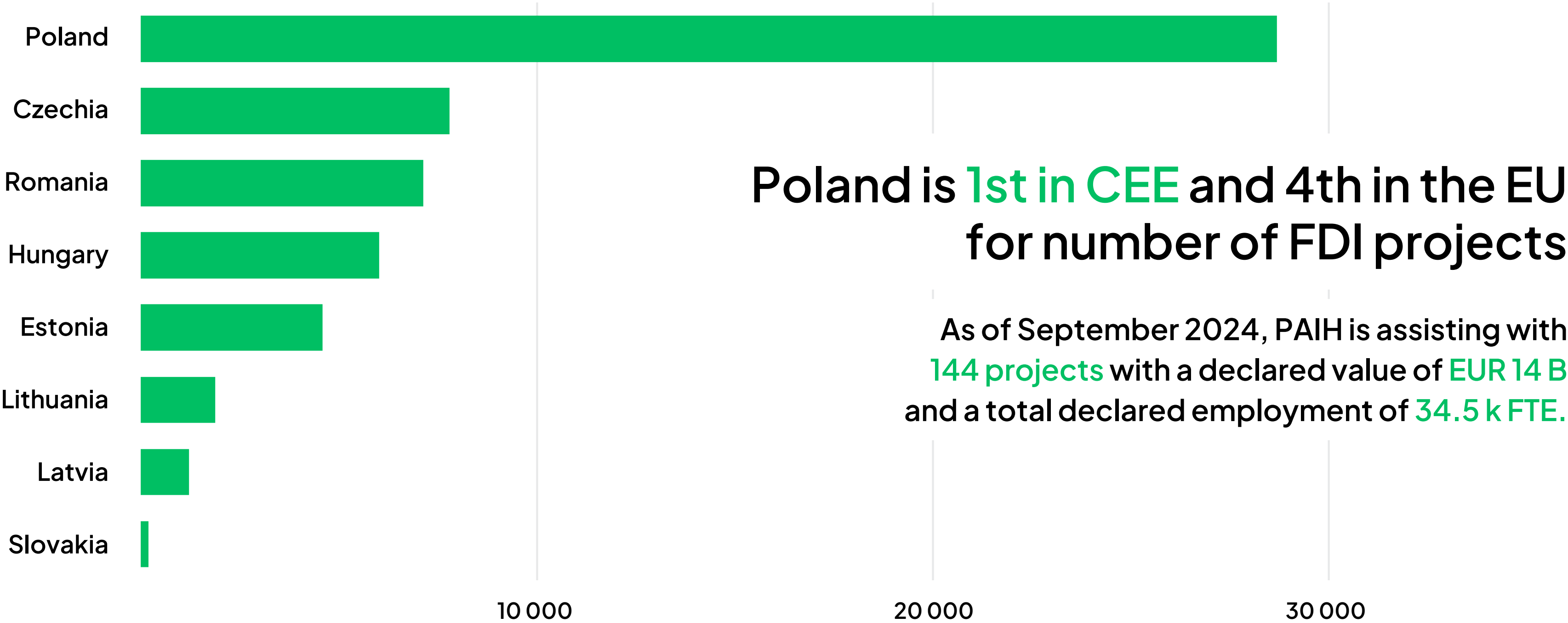
1,6 GW

energy production capabilities
by 2033 (estimation)

9 GW

target energy
production capabilities

Attracting FDI



Source: the fDi Report 2023, UNCTAD

Building sectors from scratch

500K

Poland FTE's

€38 bln

EV batteries export value in 2022

1st

Battery manufacturer
in Europe
(2nd in the world after China)



Mercedes-Benz

northvolt[®]



Investment attractiveness of Poland

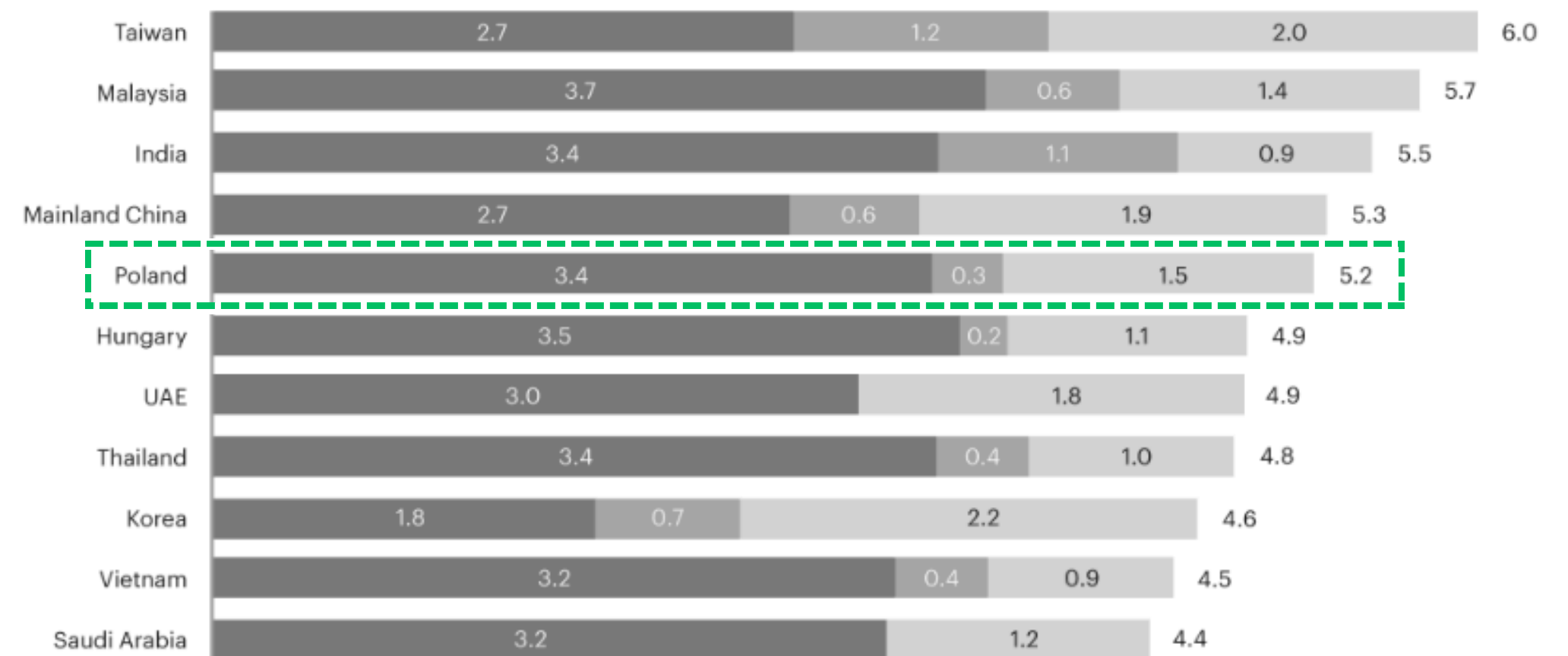
5th place in the world and 1st in Europe in the attractiveness ranking for back-end semiconductor production.

KEARNEY

- Strategic location in the EU
- Special incentives offered by the Polish gov.
- Strong government support, aligned with EU goals to strengthen local semiconductor networks
- Favourable business conditions with lower operating costs, supported by a skilled workforce and developing infrastructure for semiconductor manufacturing.

Back-end semiconductor manufacturing attractiveness index

Preliminary



Source: Back-End Semiconductor Manufacturing Attractiveness Index (kearney.com)

Recent announcements



R&D Centre in Gdansk



Manufacturing Site in Gdansk



Manufacturing Site in
Ożarów Mazowiecki

Semicon Europa 2024, Munich



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we care more