




invest
in Lviv

investment passport



UKRAINE: KEY FACTS



 Area	603,500 km ²
 Population	45 million (70% urban-based) 20 million diaspora worldwide
 Time zone	GMT +2 in winter GMT +3 in summer
 Language	Ukrainian
 Currency	Ukrainian hryvnia (€1 = UAH 32.5)
 Ease of Doing Business 2018 - #71	Dealing with Construction Permits - #30
 Global Innovation Index 2018 - #43	Innovation Efficiency - #5
 Big Mac Price	\$1.91
 Climate	Average temperature in July +24 C° Average temperature in February -3 C°



UKRAINE: KEY FACTS



Information Technology

- #1 IT engineering force in Central and Eastern Europe (CEE)
- IT services are 40% of all exports to US - the #1 trade category
- 100+ global companies operate software R&D labs in Ukraine
- 130,000 engineering graduates annually



Agribusiness



- 33% of world's black-earth soil ("chornozem") is in Ukraine, considered the most fertile and productive agricultural land
- Over 70% of Ukraine is agricultural land, valued at > \$100 billion
- #1 in sunflower oil exports globally
- #6 world grain exporter
- #4 in corn exports globally

Infrastructure

- Railways – 23,000 km (#14 globally)
- #7 world's largest freight transporter
- Roadways – 170,000 km (#29 globally)
- Airports – 17 international airports
- Sea ports – 13 along mainland of Ukraine
- 4 of 10 European transport corridors run through Ukraine
- Pipelines – 37,000 km of gas, 4,800 km of oil and 4,400 km of refined products



Natural Resources



- #1 black soil concentration globally
- #2 manganese ores and graphite deposits globally
- Top-3 iron ore deposits globally
- Local gas production covers over 50% of needs





'A wonderfully welcoming central European city, boasting the best Europe has to offer'

Lonely Planet

LVIV: KEY FACTS



-  **Founded** 1256
-  **Area** 182 km²
-  **Population** 758,000 (Lviv city)
1,000,000 (Lviv agglomeration)
2,500,000 (Lviv region)

Membership in International Organisations



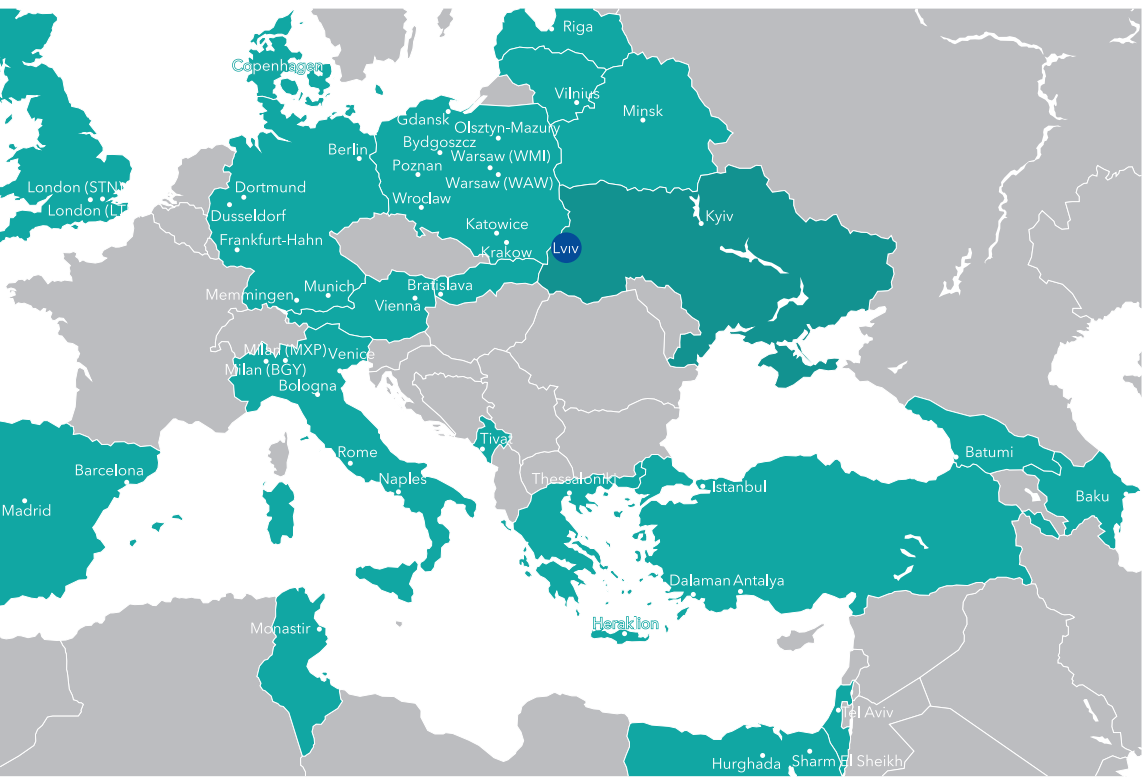
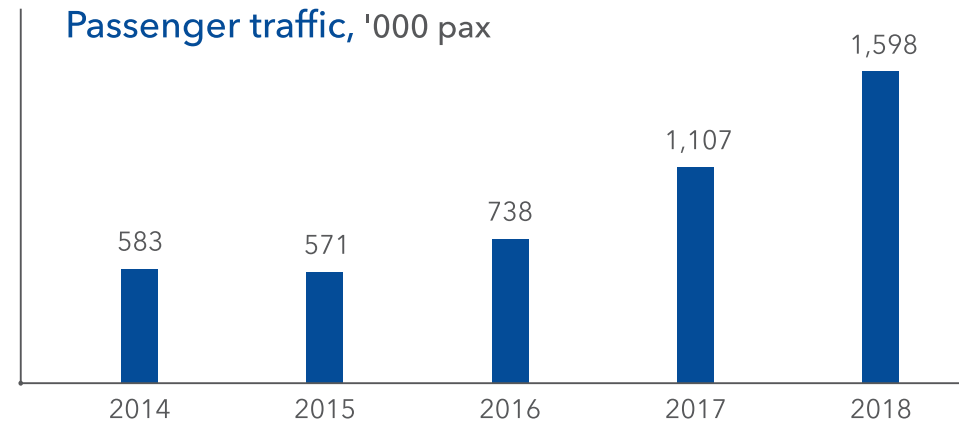
Sister cities

- Chengdu, China 2017
- Plovdiv, Bulgaria 2016
- Vilnius, Lithuania 2014
- Tbilisi, Georgia 2013
- Przemysł, Poland 2005
- Novi Sad, Serbia
- Banja Luka, Bosnia and Herzegovina 2004
- Lublin, Poland
- 2003 Łódź, Poland
- Wrocław, Poland 2002
- Kutaisi, Georgia
- Kraków, Poland 1995
- 1993 Budapest, Hungary
- Rochdale, UK 1992
- Rzeszów, Poland
- 1989 Freiburg im Breisgau, Germany
- 1973 Winnipeg, Canada



-  60 km to EU
 - A4 / E40 main road
 - 9 customs border checkpoints
-  International airport
 - 44 destination
 - 9 departure gates
 - 2,000 pax / hour
 - 7 km / 15 min to city center

Source: Lviv Investment Office, 2019



Source: Danylo Halytskyi International Airport "Lviv", 2019

Airlines in International Airport "Lviv":



Source: Danylo Halytskyi International Airport "Lviv", 2019

DANYLO HALYTSKYI
INTERNATIONAL AIRPORT "LVIV"

'What really distinguished Lviv was
its decidedly international
sensibility'

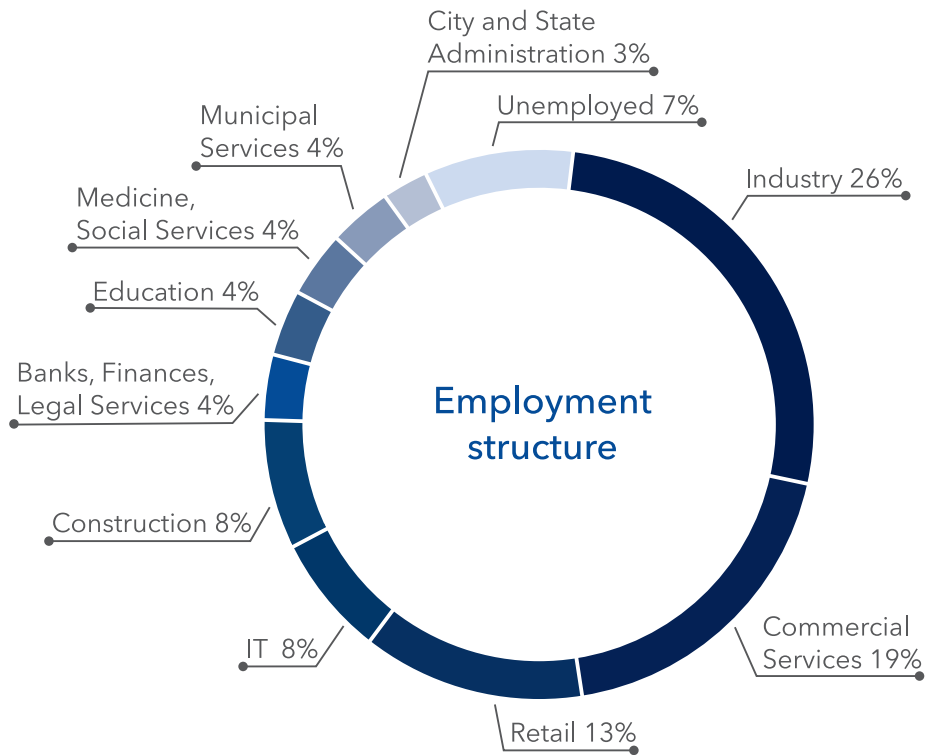
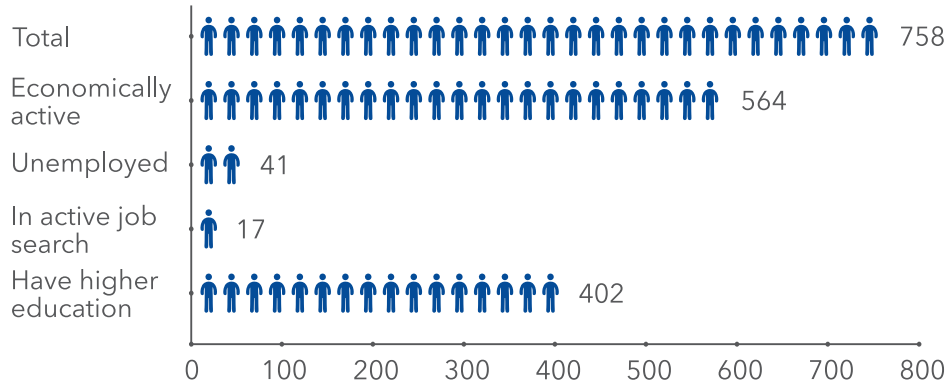
The New York Times



PEOPLE

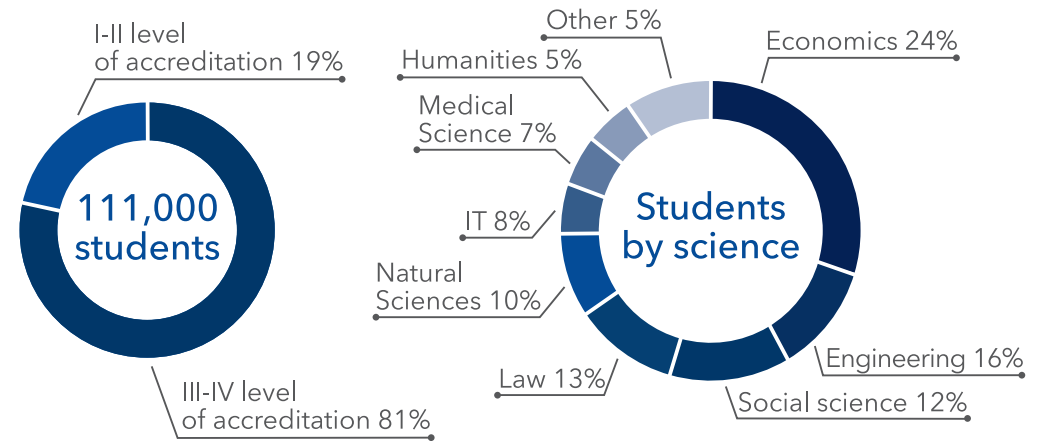


Total population, '000 people



Source: Lviv Investment Office, 2019

EDUCATION



Universities (III-IV level of accreditation), students

Lviv Polytechnic National University	25,835
Ivan Franko National University of Lviv	19,160
Danylo Halytsky Lviv National Medical University	4,848
Lviv National Agrarian University	4,778
Lviv State University of Internal Affairs	4,646
Lviv National University of Veterinary Medicine and Biotechnologies	3,301
Ukrainian National Forestry University	3,234
Hetman Petro Sahaidachny National Army Academy	2,973
Lviv University of Trade and Economics	2,904
Lviv State University of Physical Culture	2,712
Ukrainian Academy of Printing	2,507
Lviv State Financial Academy	2,500
Lviv State University of Life Safety	1,962
Ukrainian Catholic University	1,459
Lviv National Academy of Arts	1,079
10 other small universities	6,329
Total	90,227

Source: City Institute, 2018





'Lviv, a city in Western Ukraine that's become a modern business hub, is the spot VirtualTourist members unanimously agreed is the top European city to see now'

Reuters

COST-EFFECTIVE LOCATION



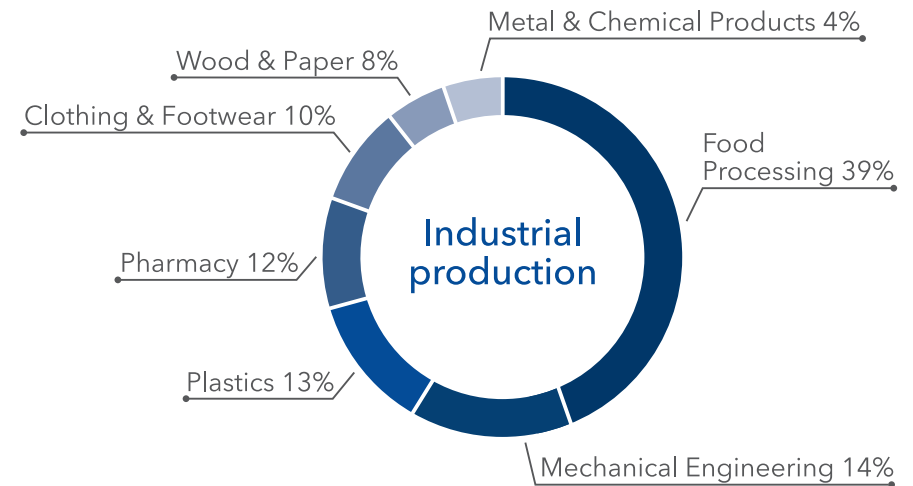
Effective tax rates

VAT	20%
Corporate income tax	18%
Corporate tax on salary	22%
Individual income tax (+temporary military tax)	18% + 1.5%
Industrial property tax (for large companies)	0%
Land tax	1%

Utilities, as of Q1 2019

Electricity	€0.069 / kW h
Natural gas	€0.4 / m ³
Water & sewerage	€0.41 / m ³

€400 gross average salary



International presence (industrial production):





IT INDUSTRY



317	IT companies in Lviv
21%	of city GRP
21,000	IT specialists
56%	software engineers
99.6%	speak English
4,500	IT specialists graduate annually
28%	predicted annual growth of IT industry
3,000+	participants in IT Arena annual event

Source: Lviv IT Cluster, 2019

Companies from The Global Outsourcing 100 present in Lviv:

softserve *

eleks *

infopulse



N-iX



<epam>

intellias

*HQ in Lviv



0800 300 331
info@itcluster.lviv.ua
itcluster.lviv.ua



BPO & SS POTENTIAL



2,000+ employees*

IT outsourcing	Finance	Consulting
Research	Accounting	Advisory
Data analysis	Sales	Legal services
Technical support	Procurement	HR
Project management	Audit	Call centers

*Excluding IT outsourcing

Average net salaries

Accountant	\$330
Call center employee	\$587
Customer relations specialist	\$366
Financial analyst	\$470
Technologist	\$540
IT Administrator	\$1000
QA	\$1350
IT Developer	\$2000

Source: Deloitte, 2018

International presence:

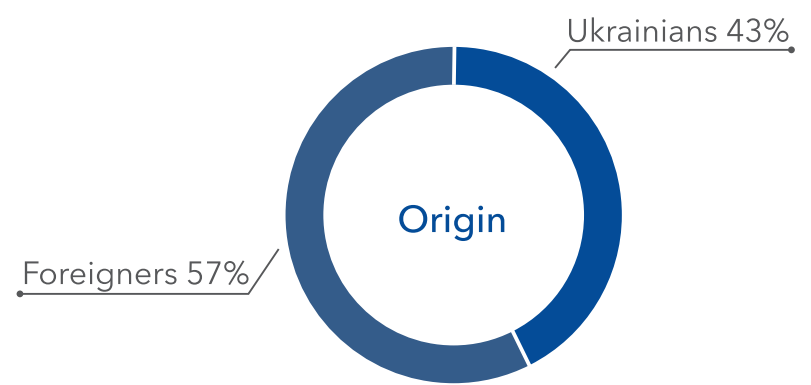
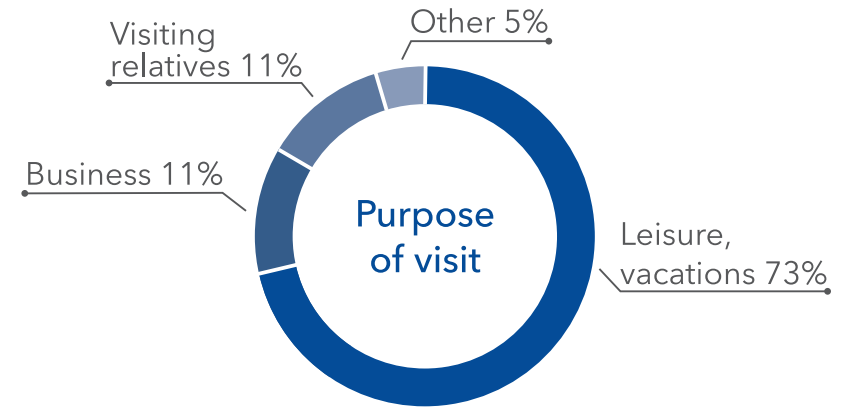
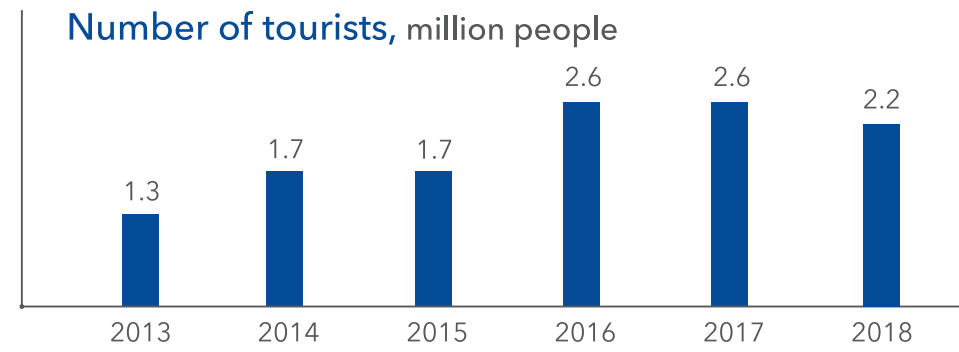




'With its independent coffee houses and traditional chocolatiers, Lviv looks, smells, and tastes like the best of Europe'

CNN

TOURISM



- 4.4 days average length of stay
- €74 daily spending of 1 tourist

Source: Lviv Tourism Office, 2019



Lviv Conference Facilities

- 41 hotels with conference facilities
Sonata Hotel - 450*
- 9 academic venues
Lviv Polytechnic National University - 800*
- 10 unique venues
Lviv Opera and Ballet Theatre - 1,000*
- 12 conference halls
Arena Lviv Stadium - 1,200*

* Biggest capacity, theatre seating

Hotels

Hotels with Conference Facilities	41
Other Hotels	81
Total no. of Rooms	3,866
No. of Beds	7,824

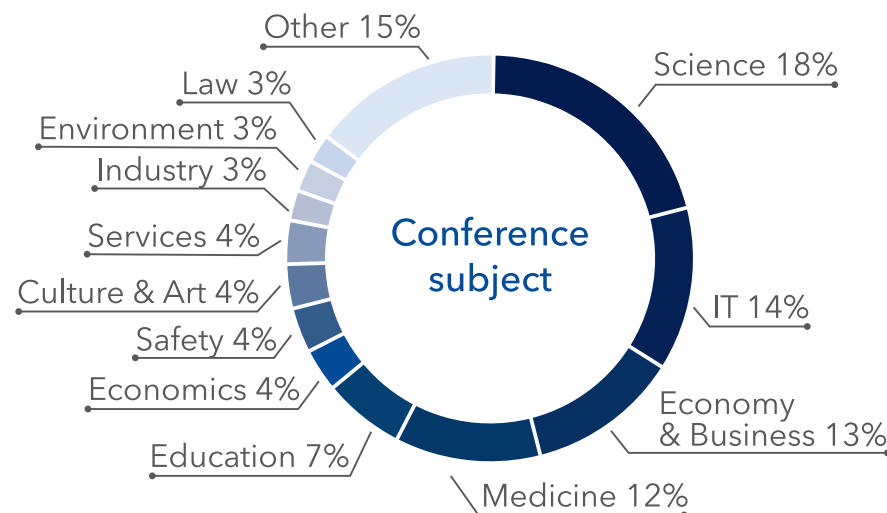
Total of conference participants in 2018 - 83,191



Source: Lviv Convention Bureau, 2019

Top 10 conferences in Lviv in 2019

Event Industry Forum	8-9 Feb
12 th Central and Eastern European Course in Pediatric Surgery	22-23 Mar
19 th Middle-European Buiatrics Congress	22-25 May
Lviv Media Forum	30 May-1 Jun
Win with the Lion Tourism Forum	8-9 Jun
IEEE Ukraine Conference on Electrical and Computer Engineering - UKRCON	2-6 Jul
Lviv Ecoforum "Water and Energy"	13-14 Sep
26 th International Book Forum	18-22 Sep
IT Arena Conference	27-29 Sep
RECOOP 10 th Annual Project Review Meeting	11-12 Oct



Source: Lviv Convention Bureau, 2019



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METROPOLITAN ANDREY SHEPTYTSKY CENTER

'Lviv is really a part of Europe, I can't help
feeling. It's a very good country destination
for future congresses, fresh and welcoming'

Marcel Vissers, Meetings Media Company





CTPark Lviv



A-Class manufacturing and logistics facilities
 24 ha land plot
 100,000+ m² GLA
 Located at A4 Highway
www.ctp.eu

Congress & Expo Center



8 ha land plot
 27,000 m² planned area
 3,500 attendees capacity
 Located near Arena Lviv stadium

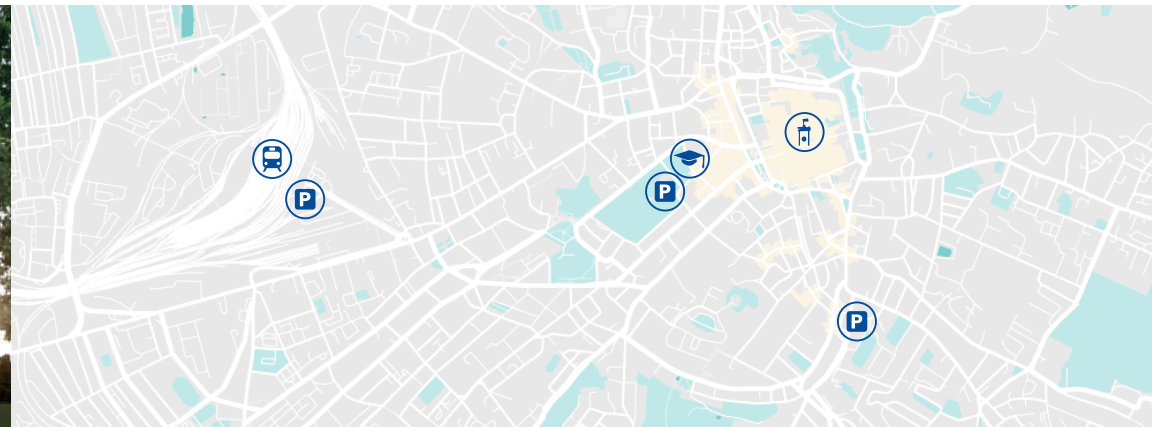


Business Park



4.8 ha land plot
 1.5 km to airport
 Multifunctional congress / sports / concert / expo center
 Offices
 Hotel

Underground Parkings



3 underground parkings to be constructed:

- in front of main railway station
- in the city center near central university
- 6 min on foot from the city center

INDUSTRIAL ZONES



Two industrial zones with land plots assigned for industrial production facilities, plants and infrastructure.

92 ha - Syhnivka Industrial Zone

- 5 km / 12 min to ring road / A4 / E40 main road
- 1 km / 5 min to ring road / A4 / E40 main road via future road
- 8 km / 20 min to airport
- 8 km / 22 min to main train station
- 20-500 m to railway

37 ha - Ryasne-2 Industrial Zone

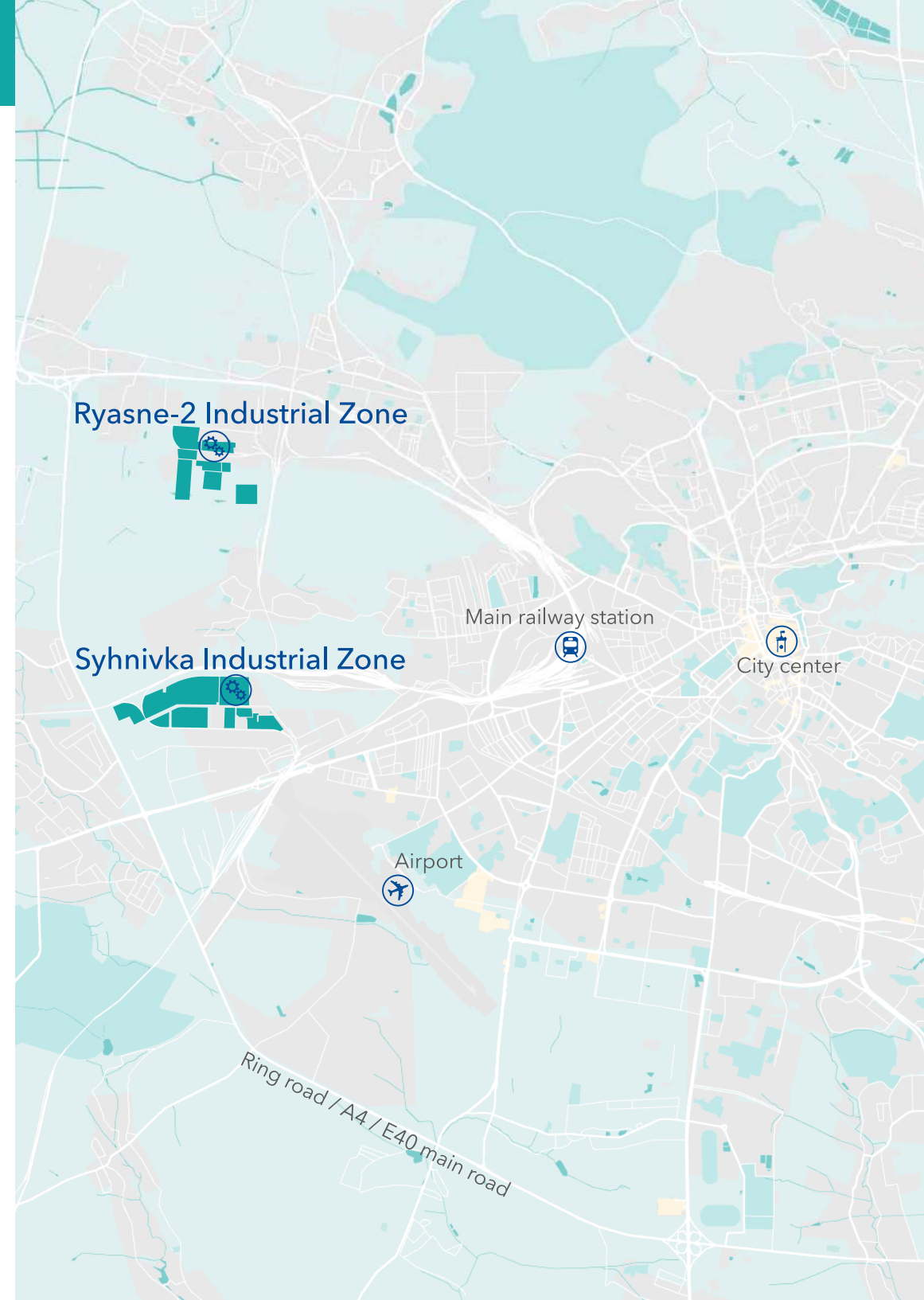
- 2.5 km / 5 min to ring road / A4 / E40 main road
- 15 km / 27 min to airport
- 10 km / 36 min to main train station
- 200-1,000 m to railway

Any chosen piece of land from industrial zone can be separated.

Acquisition:

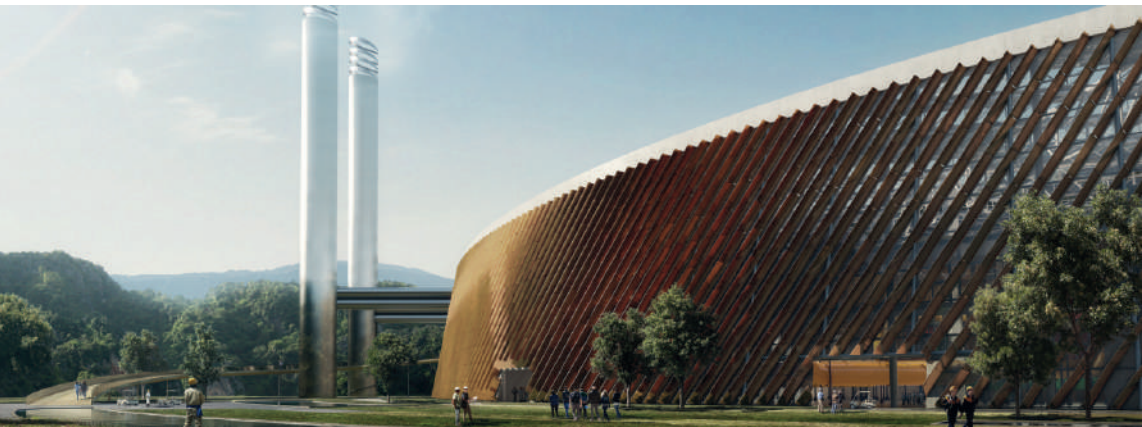
- Purchase via auction
- Long-term lease
- Long-term lease as industrial park

City provides modern engineering, transport, logistics and other infrastructure.





Solid Waste Management Project



€100+ M investment from EBRD, EIB and Municipality
 Construction of MBT Plant
 38.8 ha old landfill rehabilitation
 New landfill construction
 250,000 tons of waste per year



Project Manager:
 Lviv Municipal Company
 "Green city"
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 zelene.misto@lvivcity.gov.ua

Urban Public Transport Projects

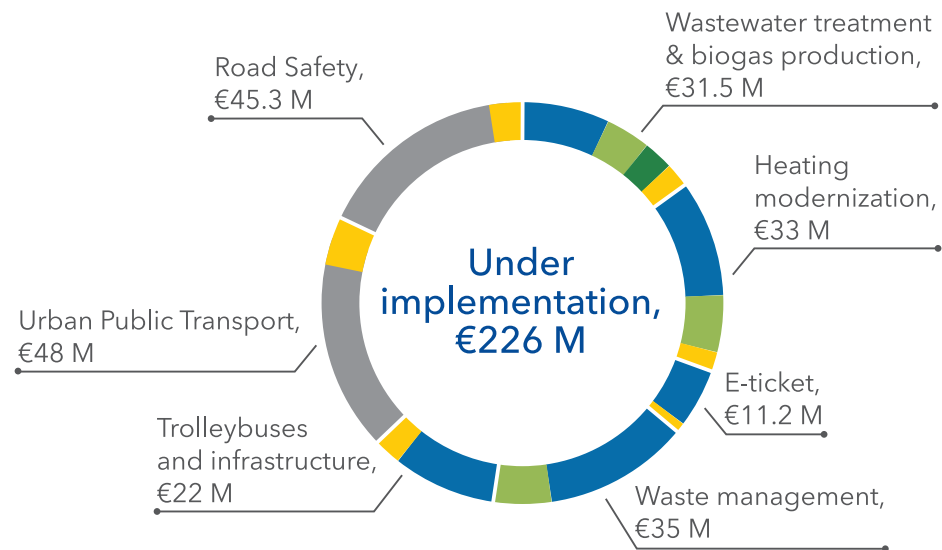
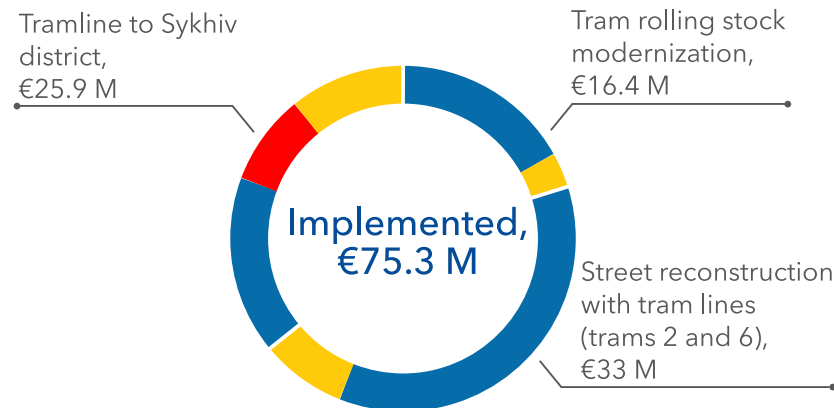


Implemented

- 7 new and 35 used trams (EBRD funding)
- Construction of new tramline (EBRD funding)
- 150 new buses in 2018 (leasing financing)

Under implementation:

- Automatic fare collection system (EBRD funding)
- 50 new trolleybuses (EBRD funding)
- 10 new trams (EIB funding)
- 100 new buses (EIB funding)



Lviv city council



European Investment Bank
 The EIB bank



NORDIC ENVIRONMENT FINANCE CORPORATION



E5P



Bundesministerium für Umwelt, Naturschutz und nukleare Sicherheit



OFFICE PROPERTY MARKET



- 🏢 200,000 m² total stock (GLA)
- 💰 \$12-16 rent (excluding VAT and utilities)
- 📉 6% vacancy rate

Source: Deloitte, 2018

205,000 m² of A-Class offices to be commissioned before 2022



Innovation District IT Park

\$160 M investment

10 ha construction area:

- 6 A-class offices
- 95,000 m² office GLA
- 1 university campus
- 5,700 m² hotel
- 13,000 m² retail and service zone
- 3,167 parking places

LvivTech.City

50,000 m² of offices, apartments, leisure facilities



Supports

investment activities locally and clears any investment process bottlenecks

Searches

investment targets

Provides

information on business climate, investment opportunities, human capital availability, local costs and taxes structure

Identifies

potential investment projects and investment opportunities on demand

Arranges

bilateral business meetings and study visits

Promotes

investment attractiveness



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Lviv city
council

