

## Sector Report

# EURO 2012 and Sport Infrastructure Poland

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## OVERVIEW

### EURO 2012 Championships

Poland and Ukraine will host the European Football Championships in 2012. The organisation in overall charge of this massive project is PL2012, which reports to UEFA on the development of sport infrastructure. PL2012 is also responsible for collaboration with the 4 host-cities, co-ordinators who prepare action plans, feasibility study, master plans, risk assessment and financial reports in accordance with UEFA requirements. Host cities in Poland are Warsaw, Gdańsk, Poznań and Wrocław. The majority of stadia are owned by municipalities.

The City Halls are responsible for development of transport and accommodation infrastructure.

EURO 2012 Polska will organise the EURO 2012 event in Poland in collaboration with UEFA. EURO 2012 Polska will be responsible for recruiting volunteers, accommodation for teams and spectators, media, organising transport (vehicles will be provided by the event sponsors KIA and Hyundai), ceremonies, safety and security, logistics including crowd control, barriers and fencing.

UEFA retains direct control of ticketing sales and corporate hospitality.

Detailed information about projects under progress and new tenders published by host-cities is available from <http://masterplan.2012.org.pl>.

The projects include:

- modernisation and development of road connection between local airports and stadiums
- construction of integration junctions and bypasses to improve traffic to the city centre
- expansion and development of local road in connection to the national road network
- reconstruction of streets and viaducts
- development of the integrated traffic control and monitoring system
- extension of city Fast Tram ways in connection to railway stations
- development of airport infrastructure and construction of new terminals and parking space for aircrafts
- development of underground connections
- development of rescue service systems, public security and teletransmission systems
- construction of the power supply system for host-cities' agglomerations
- construction of new accommodation facilities and training centers
- stadium operation and legacy use contracts

All the stadium construction projects have now been awarded but opportunities remain for stadium operators, with tenders to be announced from January 2010

The construction and modernisation of the stadia and the overall preparation for EURO 2012 will require the development of transport infrastructure which includes airports, railways, roads, motorways and security systems.

## **My sports field – ORLIK 2012**

In parallel with the EURO 2012 championships, the Polish Ministry of Sport and Tourism has launched a national programme: "My sports field – ORLIK 2012". The programme is aimed at establishing over 2000 new sports fields in the years 2008 – 2012.

The programme is financed by the Ministry of Sports and Tourism (1/3), the Regional Authorities (1/3) and the City Halls (1/3). The total budget allocated in 2009 for this programme was PLN 200 million (£1.00 = PLN 4.40).

There is a standard specification to be met for sports fields. Each facility will consist of a football field (size: 30 x 62 meters) and a multifunctional field (size: 18 x 32 meters) which will be covered with artificial grass or polyurethane surface. Each sports complex will include a lighting system, changing rooms, sanitary facilities and children's playground (optional). The total area of the plot must be 3,000 m<sup>2</sup>.

The total cost estimation for one sports complex is PLN 1 million. Contracts for the construction of sports fields are subject to public procurement.

Project specification is available at [www.orlik2012.pl](http://www.orlik2012.pl) (in Polish only). If you need English translation, we will be happy to provide you with a list of recommended translators.

## **CHARACTERISTICS OF MARKET**

### **Olympic Stadia and Sport Infrastructure**

In addition to the main stadium projects, 16 new training and accommodation centres for football teams need to be built. The allocated budget for the 4 stadia and surrounding infrastructure is estimated at € 850 million.

#### **Warsaw**

The construction of the new 55,000-seater National Stadium (by a consortium led by PBG S.A. which includes Alpine Bau Deutschland A.G., Hydrobudowa Polska) will take 18-24 months and should be completed by mid 2011. Facilities will include an Olympic-standard stadium, a swimming pool and a sport/entertainment hall. Further information about the progress of the National Stadium project is available from the City's web-site: [www.2012.org.pl](http://www.2012.org.pl)

In **Gdansk**, a 44,000-seater stadium is due to be constructed by 2011. A consortium of WAKOZ, Hydrobudowa Polska, Hydrobudowa 9 and Alpine Bau Deutschland A.G won a construction contract.

The construction of the second airport terminal amounting to € 38 million will be the major infrastructural project in the region. A road from the airport to the city will be modernised at the cost of PLN 680 million. See the City's web-site for more information: [www.bieg2012.pl](http://www.bieg2012.pl)

In **Wroclaw**, the construction of a 40,000-seater stadium was won by consortium led by Mostostal Warszawa S.A. More information on EURO 2012 projects is available from: [www.e2012.eu](http://www.e2012.eu)

A bid for the operator of Wroclaw stadium has been submitted by the consortium of SMG Entertainment Deutschland GmbH, SMG Europe Holdings Ltd and SMG. An operator will be selected in January 2010.

The completion of a 46,000-seater stadium in **Poznan** is due by 2010. The largest infrastructure project in the region will be the construction of the city bypass at the cost of PLN 1.2 million. See the City website: [www.poznan.pl](http://www.poznan.pl)

## Transport Infrastructure

### • AIRPORTS

It is estimated that by 2013 the value of investment projects at Polish airports will exceed PLN 7bn (€1.8bn) of which nearly one-third will be spent on the construction of new regional airports. Almost 12 terminals as well as the whole infrastructure i.e. car parks, airport access roads and runways will be built or modernised.

### • RAILWAYS

There are plans to modernise over 1,500 kilometres of railways. Euro 2012 hosting cities will (mainly) invest in public transport, railway connections between the airports and city centres as well as the railway stations.

A second line of metro with a station at the National Stadium is under construction and will be fully completed in 2014.

### • MOTORWAYS

Approximately 1,650 km of express roads and 900 km of highways need construction/upgrading. The total investment budget in the regions will amount to € 6.6bn

## OPPORTUNITIES

Construction of stadiums and sport infrastructure including transport infrastructure is in progress.

Tenders for selection of stadium operators are to be published at the beginning of 2010. Only Wroclaw is currently assessing bidding documents and will sign an operational contract in January 2010.

Within EURO 2012 organisations a special task departments were set up to carry out security issues and collaboration with UK experts would be required.

There are still opportunities for UK companies in the following areas:

- Project management, operational management, feasibility, security, energy and cost efficiency, marketing/promotional capabilities and post event commercial management/legacy use
- UK experts providing consultancy services and technical solutions
- Sports equipment/materials suppliers
- UK investors interested in partnership agreements with Polish municipalities
- Participation in urban and post-industrial regeneration projects during development of EURO 2012 infrastructure
- Construction of budget accommodation, hotels and training facilities

#### **EURO 2012 RELATED SECURITY OPPORTUNITIES**

The security market in Poland is well developed with majority of international players already present. Due to the developing Polish economy, a large number of security projects and availability of UE structural funds, there are still good prospects for the security sector in the country and those related to EURO 2012 in particular.

British expertise in providing security solutions at football stadia is recognised and highly respected in Poland. And so is the British security industry in general as a provider of innovative and high tech solutions.

EURO 2012 related opportunities in the security sector encompass:

1. Antiterrorist security systems for stadia and their surroundings including:
  - a) Integrated access control systems ;
  - b) Systems, equipment and installations for detection of explosives, radioactive materials, water and air pollution;
  - c) Non-invasive methods of clothing, luggage and vehicle control.
2. Integrated crowd control system.
3. Audio-visual recording of crowd behaviour.
  - a) Monitoring systems design;
  - b) Audio and video material transfer, viewing and recording systems;
  - c) Monitoring management systems, including integration with access control.
4. Professional acoustic systems and visual information systems.
5. Training for stewards. Their tasks and competences. Division of tasks and responsibilities between stewards and public services (police etc).
6. CCTV systems for public institutions and municipalities.
7. Vehicle and people recognition systems.

All information about progress on EURO 2012 construction projects, tenders, building permits and work assessment report to UEFA EURO 2012 are available from Pl.2012 website <http://masterplan.2012.org.pl> and are updated quarterly.

In Tenders in Progress section you will find investor information as well as the tender number and the link to the invitation to tender, which makes it easier to find tender details. For planned tenders, there is a table with information on the contractor and the planned date of invitation to tender.

In Master Plan detailed information about EURO 2012 projects in 4 host cities Warsaw, Gdansk, Wroclaw and Poznan are provided.

Furthermore, there is some information on projects in Chorzów and Cracow, even though UEFA did not make them host-cities. However, they are mentioned on the site because those projects were launched on terms laid down in the Act on holding the finals tournament of the UEFA EURO 2012™ European Football Championship, which provided an opportunity to take advantage of the simplified administrative procedures.

All projects are divided into several major categories which include: the name of a host-city, progress on stadium construction, requirement on improvement or development of municipal, railway and road transport and airport. All these categories are then spitted in two stages of project development: preparation and implementation.

UKTI publishes international business opportunities gathered by our network of British Embassies, High Commissions and Consulates worldwide. These opportunities appear in the Opportunities portlet on the relevant sector and country pages on the UKTI website. By setting up a profile you can be alerted by email when relevant new opportunities are published. New or updated **alert profiles** can be set in My Account on the website.

## KEY METHODS OF DOING BUSINESS

In order to launch products/services/consultancy on the Polish market or to apply for tenders, British companies should first identify appropriate local business partners who would be interested in distributing the companies' products in Poland or co-operating in implementing their construction services/advice.

When considering doing business in Poland, it is essential to obtain legal, financial and taxation advice. A useful contact list of lawyers as well as further information on the sport and tourism, transport infrastructure and security sector in the country is available from the Commercial Team at the British Embassy in Poland.

British companies might also wish to consider participating in various Trade Missions to Poland. You can find out about visits to the Polish market by contacting your regional UKTI team. You will find their contact details on the UKTI website at [www.ukti.gov.uk](http://www.ukti.gov.uk).

You might also like to look at the British Embassy website: [www.ukinpoland.fco.gov.uk](http://www.ukinpoland.fco.gov.uk)

It is worth noting that regional governmental and municipal authorities have strong decision making powers. They take decisions about allocation of their regional funds to the most important construction/ecological projects vital for their regions.

Other background information on doing business in **Poland** can be found on UKTI's website. Simply go to the **Poland** country page where you will find information on:

- Economic background and geography
- Customs & regulations
- Selling & communications
- Contacts & setting up
- Visiting and social hints and tips

## MORE DETAILED SECTOR REPORTS

The British Embassy Commercial Section in Poland can help in identifying relevant potential business partners through the Overseas Market Introduction Service, UK Trade & Investment's chargeable service, which is now delivered exclusively on-line. UK companies can also register on the website to sign up for free information on business opportunities in this and other sectors.

Detailed reports tailored to specific customers needs are available as a chargeable service through the Overseas Market Information Service (OMIS). For further details on the procedure, package levels and service fees please contact International Trade Team in your local UKTI Office, Scottish Development International, Welsh Trade International or Invest Northern Ireland as relevant.

## PUBLICATIONS

Sport Plus - a monthly magazine provides updated information about development of sport infrastructure as well as promotional articles about suppliers to sport projects [www.sportplonline.pl](http://www.sportplonline.pl)

Selected reports on the sport and transport infrastructure sector in Poland are available from:

[www.muratorplus.pl](http://www.muratorplus.pl)

[www.paiz.gov.pl](http://www.paiz.gov.pl)

[www.mi.gov.pl](http://www.mi.gov.pl)

[www.gddkia.gov.pl](http://www.gddkia.gov.pl)

and <http://masterplan.2012.org.pl>

## EVENTS

The British Embassy's Commercial Section in Warsaw is hoping to participate in UKTI's Major Sports Events Regional Roadshow in June 2010 to meet and brief UK companies on the opportunities arising from EURO 2012 in Poland. We also expect to organise a delegation of Polish representatives from the EURO 2012 organisation to the Leaders in Football conference in London in October 2010.

Further information is available from Halina Kosicka, Senior Trade & Investment Adviser: [halina.kosicka@fco.gov.uk](mailto:halina.kosicka@fco.gov.uk)

Please note the following relevant exhibitions taking place soon:

**BUDMA**, January 2010 in Poznań:

[www.mtp.pl](http://www.mtp.pl)

Budma is the largest construction sector event, and includes a Sport Infrastructure Centre

**ROADS & URBAN INFRASTRUCTURE**, October 2010 in Warsaw:

[www.mtpolska.com.pl](http://www.mtpolska.com.pl)

**AUTOSTRADA (HIGHWAYS)** May 2010 in Kielce:

[www.ctk.com.pl](http://www.ctk.com.pl)

**SECUREX**, April 2010 in Poznan:

[www.mtp.pl](http://www.mtp.pl)

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For new and inexperienced exporters, our Passport to Export process will take you through the mechanics of exporting. An International Trade Adviser will provide professional advice on a range of services, including financial subsidies, export documentation, contacts in overseas markets, overseas visits, translating marketing material, e-commerce, subsidised export training and market research