

FRONT OFFICE
FOR INVESTOR RELATIONS
OF THE ADMINISTRATION
OF LENINGRAD REGION



AUTOMOTIVE CLUSTER OF LENINGRAD REGION

WELCOME ADDRESS FROM THE GOVERNOR OF LENINGRAD REGION



Dear friends,

Our region is set to become one of Russia's automotive manufacturing hubs.

Today, the Automotive and Auto Components Cluster of Leningrad region and St Petersburg produces around 25% of Russian-made cars. We have created all the conditions necessary for the development of the automotive industry. For instance, our region offers one of the best tax regimes in Russia, while it also has a developed network of industrial parks and areas for assembly plants. We have also put together a «one-stop-shop» support system for investment projects in the region.

We will continue creating a favourable environment for the auto industry. A testing centre for carmakers will be established in Leningrad region. Furthermore, cooperation within the Cluster is flourishing. We are attracting component manufacturers in order to improve product localisation of assembly plants. I hope that the information you find in this guide will help you to develop your business in Leningrad region.

We are open for cooperation with new partners and working to maintain a comfortable and transparent business environment.

Alexander Drozdenko
Governor of Leningrad region

INTRODUCTION BY COUNTRY MANAGING PARTNER, PwC RUSSIA



Dear friends,

Welcome to the Investor's Guide to the Automotive and Auto Components Cluster of Leningrad region.

At this time, Leningrad region is one of the largest car manufacturing hubs in Russia and further development of the Cluster is a priority under the region's current development strategy.

Leningrad region has been implementing a consistent economic and investment policy. The region has created a favourable environment for mutually beneficial inbound and outbound investments, which is continuously being improved.

This guide was prepared jointly with Leningrad region and is intended to familiarise potential investors with our most promising industries and the region's investment potential, and to contribute to the region's successful economic development on mutually advantageous terms.

Igor Lotakov

Country Managing Partner, PwC Russia

GENERAL INFORMATION



LENINGRAD
REGION'S AREA

S – 85,900 sq. km.

RUSSIA



ADMINISTRATIVE AND TERRITORIAL DIVISION

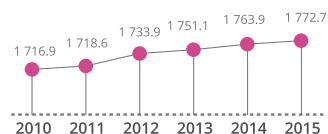
17 municipal districts
1 city district
61 urban settlements
138 rural settlements

Major cities:

Gatchina — 95,000 people
Vyborg — 80,000 people
Sosnovy Bor — 67,000 people
Vsevolozhsk — 64,000 people



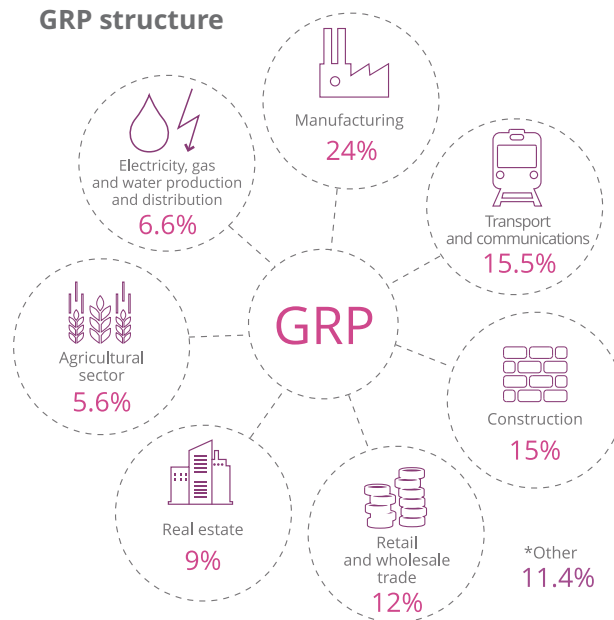
Population changes, in '000s:



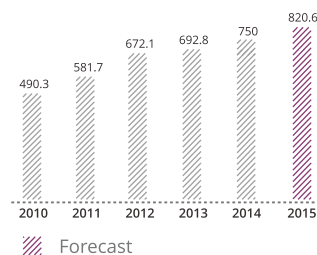
Economically active population — 956,000 people

ECONOMY

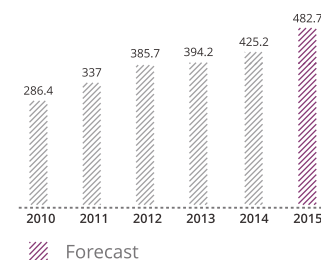
GRP structure



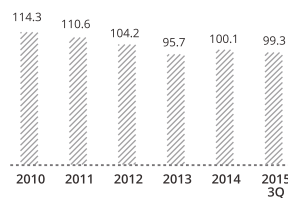
Gross regional product, RUB billion:



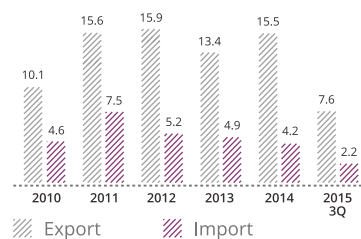
GRP per capita, RUB thousand:



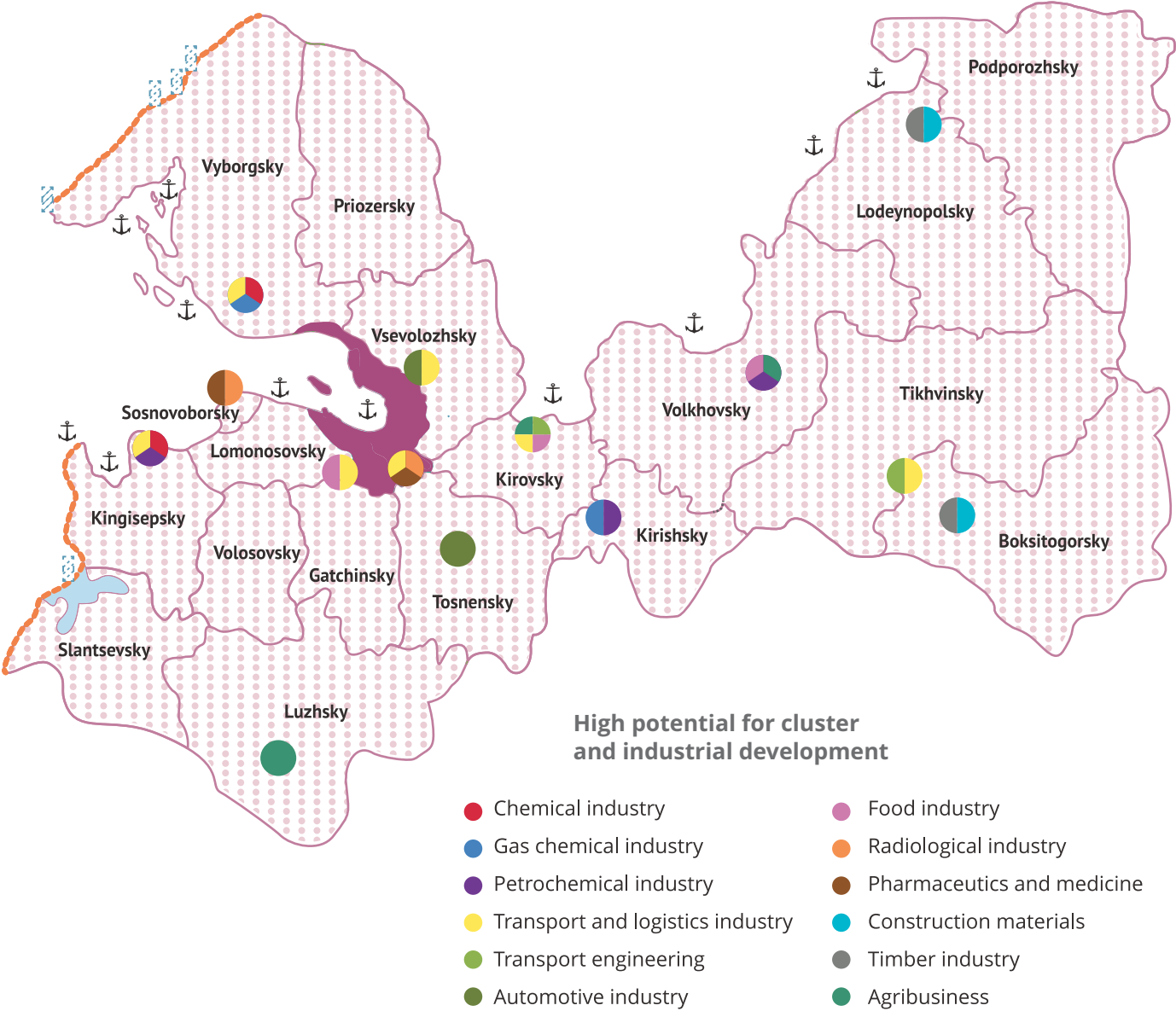
Index of industrial production, %



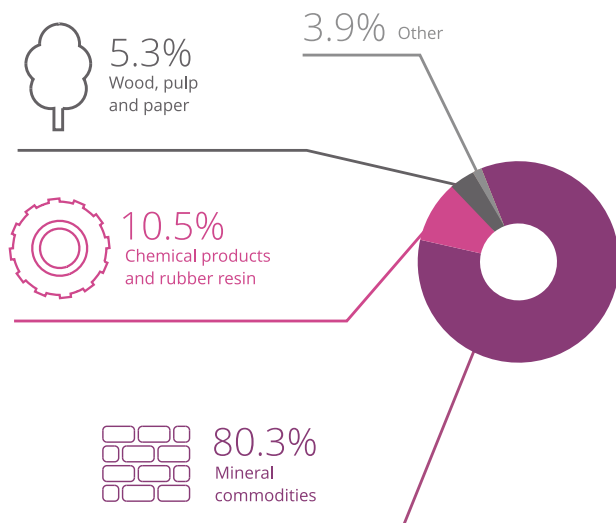
Foreign trade turnover, USD billion:



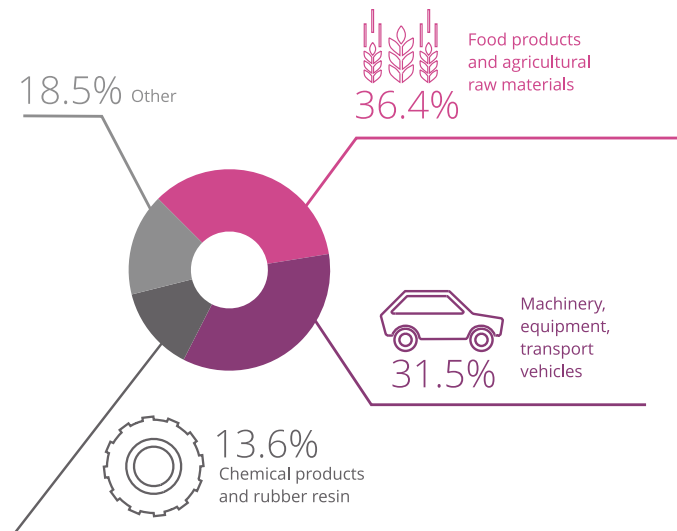
MAP OF LENINGRAD REGION'S INDUSTRIAL COMPLEX



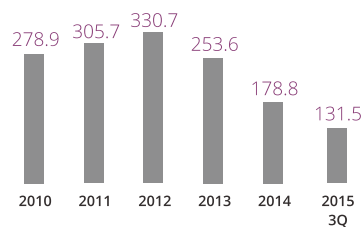
EXPORT COMMODITY STRUCTURE (2015 3Q)



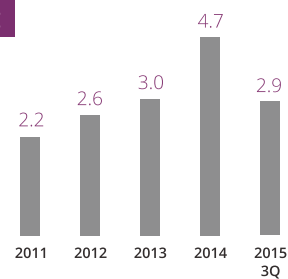
IMPORT COMMODITY STRUCTURE (2015 3Q)



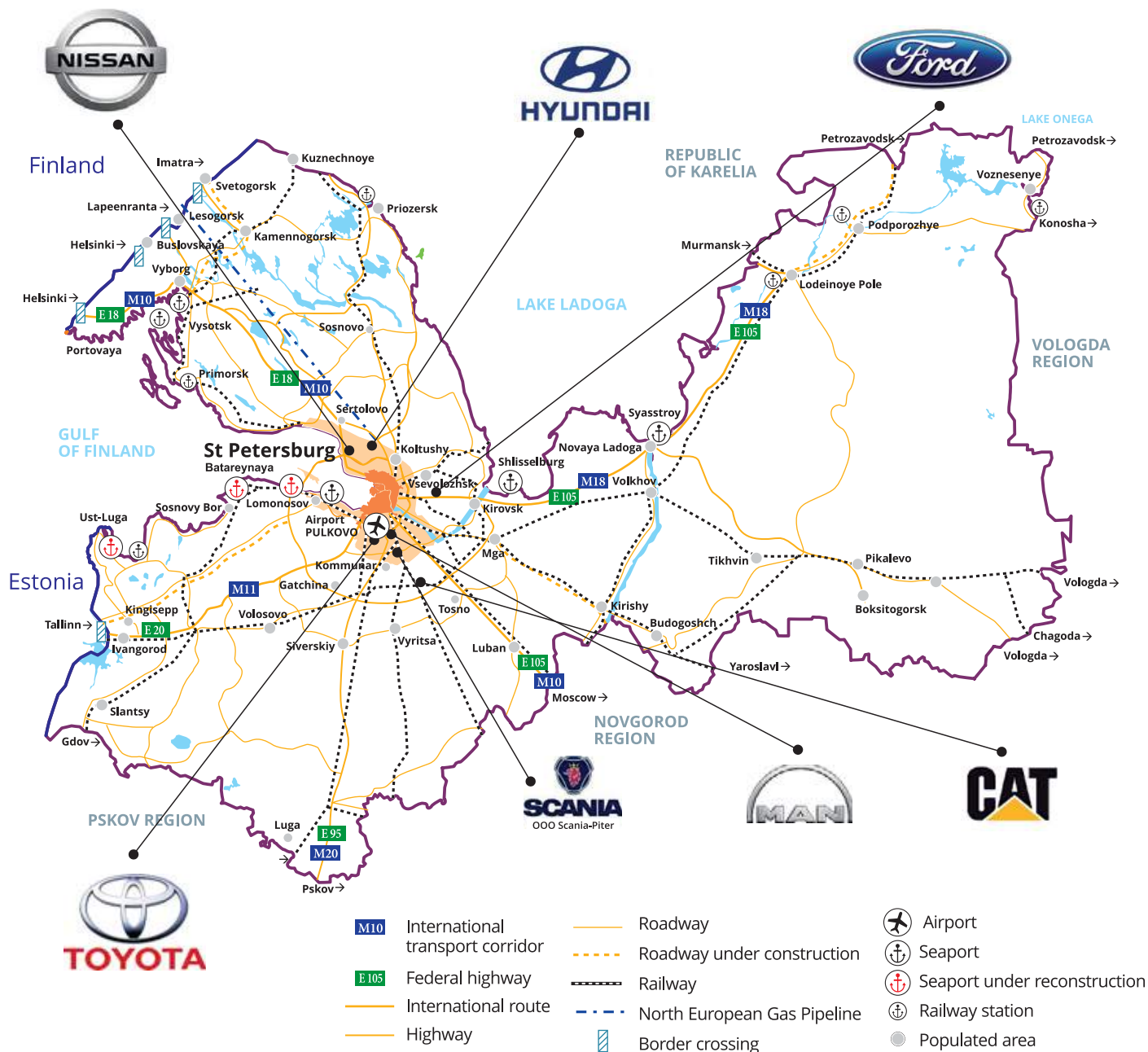
CAPITAL INVESTMENT, RUB BILLION:



FOREIGN DIRECT INVESTMENT, USD BILLION:

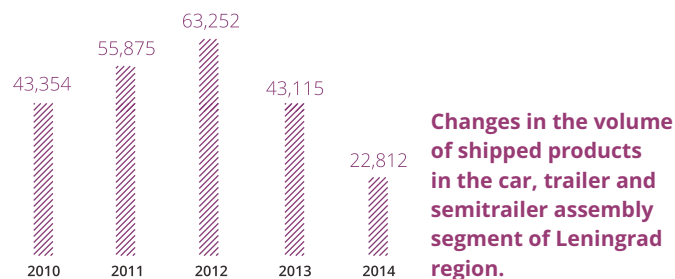


AUTOMOTIVE CLUSTER DEVELOPMENT MAP



THE AUTOMOTIVE INDUSTRY'S SHARE IN THE REGION'S GRP CAME TO AROUND 3% IN 2014

Leningrad region and St Petersburg rank second among Russia's regions for automotive production, coming to 466,000 units per year. Together with Moscow and Moscow region, the Automotive and Auto Components Cluster of Leningrad region and St Petersburg counts for 30% of automotive production in Russia.



THE FOLLOWING ENTERPRISES OPERATE IN THE REGION:

7 automobile assembly plants

(OOO Nissan Manufacturing RUS, OOO Scania Peter, OOO Hyundai Motor Manufacturing Rus, OOO MAN Truck and Bus Production RUS, OOO Toyota Motor Manufacturing Russia, ZAO Ford Motor Company and OOO Caterpillar Tosno);

Over 60 Russian and international automotive components manufacturers:

- metal carriers for cars, including pressed discs (OOO Gestamp Severstal Vsevolozhsk, OOO MW Kingisepp and OOO IT-Resource);
- plastic automotive components (OOO Grupo Antolino San Petersburg, OOO Orion and OOO Faurecia ADP);
- electric wiring (OOO Yura Corporation Rus);
- filter paper for oil filters (ZAO NPP Filter Materials);
- exhaust systems (OOO Dinex Rus);
- tyres (OOO Nokian Tyres);
- car safety systems (OOO Autoliv).

MAJOR RESIDENTS OF THE CLUSTER

AUTOMOBILE ASSEMBLY PLANTS IN LENINGRAD REGION

CLUSTER RESIDENT	LOCATION	REPORTED LEVEL OF INVESTMENT, USD MILLION	REPORTED CAPACITY, UNITS/YEAR	DEGREE OF LOCALISATION	KEY COMPETENCIES	COMPETITIVE ADVANTAGES
ZAO Ford Motor Company	Vsevolozhsk, Leningrad region	330	125,000	40%	Assembly of passenger vehicles under the Ford Focus and Ford Mondeo brands	<ul style="list-style-type: none"> • Degree of production localisation in Russia comes to 40%; • Full-scale modernisation has been undertaken, including the installation of new equipment and improvements to automation; • A new components plant has been launched; • Highly qualified personnel.
OOO Caterpillar Tosno	Tosno, Leningrad region	100	2,300	—	Production of machinery for the construction and mining industries; production of auto components	<ul style="list-style-type: none"> • A global leader in the production of construction and mining equipment, engines that run on natural gas and diesel fuel, industrial turbines and diesel-electric locomotives; • Manufactures over 300 different globally recognised products under the CAT brand; • Sales markets include European Caterpillar plants (automotive components) and Russian consumers (machinery for the construction and mining industries); • Highly qualified personnel.

AUTOMOBILE ASSEMBLY PLANTS IN ST PETERSBURG: OOO MAN Truck and Bus Production RUS, OOO Nissan Manufacturing RUS, OOO Scania Peter, OOO Toyota Motor Manufacturing Russia and OOO Hyundai Motor Manufacturing Rus.

AUTOMOTIVE COMPONENTS MANUFACTURERS IN LENINGRAD REGION

CLUSTER RESIDENT	LOCATION	KEY COMPETENCIES	COMPETITIVE ADVANTAGES	CUSTOMERS
OOO Gestamp Severstal Vsevolozhsk	Vsevolozhsk, Leningrad region	Production of metal parts and carriers for the automotive industry	<ul style="list-style-type: none"> • Uses state-of-the-art technologies for cold pressing and automated assembly; • Highly qualified personnel. 	Ford, Volkswagen, GM, Peugeot-Citroen, Renault-Nissan, Volvo Trucks and Toyota
OOO Grupo Antolino San Petersburg	Vsevolozhsk, Leningrad region	Production of interior component parts: door and ceiling panels, roof and window lifters	<ul style="list-style-type: none"> • Global leader in the production of component parts for car interior trimming; • ISO/TS 16949:2009; • Highly qualified personnel. 	Hyundai, Ford, Skoda, Renault, Volkswagen
OOO Yura Corporation Rus	Ivangorod, Leningrad region	Production of electrical equipment for engines and transport vehicles	<ul style="list-style-type: none"> • Biggest Korean developer and manufacturer of car systems, one of the global market leaders; • ISO 9001:2008; • ISO/TS 16949:2009; • Highly qualified personnel. 	Kia, Hyundai

CLUSTER RESIDENT	LOCATION	KEY COMPETENCIES	COMPETITIVE ADVANTAGES	CUSTOMERS
OOO Orion	Sertolovo, Leningrad region	Components production: under-hood parts, plastic exterior and interior elements	<ul style="list-style-type: none"> Maximum level automation and use of the latest equipment; Continuous innovation in polymer processing; ISO 9001:2008; ISO/TS 16949; Highly qualified personnel. 	Ford, Renault-Nissan, GM, Magna and Antoline
OOO MW Kingisepp	Kingisepp, Leningrad region	Production of pressed steel wheels	<ul style="list-style-type: none"> Part of Magnetto Wheels Group, one of the largest components suppliers in Europe and part of the Italian industrial group CLN S.p.A.; Uses state-of-the-art high-performance imported equipment; Develops design-and-engineering and R&D facilities; Uses raw materials produced in Russia (to protect itself from currency fluctuations); ISO 9001:2008; ISO 14000; ISO/TS 16949:2009; Highly qualified personnel. 	Autoframos, Autovaz, Peugeot-Citroen, Ford, Nissan and Volkswagen
OOO Dinex Rus	Gatchina, Leningrad region	Production of pipes, clamps, deafeners, attachment fittings, compensators, metal hoses and exhaust systems	<ul style="list-style-type: none"> Leading global manufacturer and distributor of innovative engineering solutions for exhaust gases and monitoring emissions, as well as high capacity diesel and gas engines; Its products are supplied to assembly lines of major manufacturers of trucks, buses and industrial machinery. It also meets demand for aftermarket parts; Severe testing under environmental and customer requirements worldwide; ISO 9001:2008; ISO/TS 16949:2009; Highly qualified personnel. 	Kamaz, Gaz Group, Volvo, Terex, Volgabus and ZAO PTZ
OOO Nokian Tyres	Vsevolozhsk, Leningrad region	Tyre manufacturing for passenger vehicles and off-road vehicles, commercial vehicles and truck transport, as well as industrial machinery	<ul style="list-style-type: none"> The only tyre-maker in the world specialising in road-traffic safety in harsh climatic conditions; Largest tyre manufacturer in Russia and a cutting edge tyre plant in Europe; One of the largest exporters of consumer goods from Russia; Highly qualified personnel. 	
ZAO NPP Filter Materials	Otradnoe, Leningrad region	Manufacturing of filter paper for all groups of filters (fuel, oil and air), which are installed in passenger vehicles and trucks, as well as agricultural machinery and special vehicles	<ul style="list-style-type: none"> Paper for car and industrial-purpose filters is soaked in solutions that require and do not require heat treatment for further paper finishing; Owens the only state-of-the-art laboratory for testing filter materials in Russia; Exports filter paper to a range of countries including Belorussia, Kazakhstan, Uzbekistan, Poland, Azerbaijan, Iran, etc.; Highly qualified personnel. 	
OOO Faurecia ADP	Luga, Leningrad region	Manufacturing plastic parts for the automotive industry	<ul style="list-style-type: none"> Part of Faurecia Group, which is one of the largest manufacturers of plastic parts for the automotive industry; Uses a wide range of materials (skins, leather, textiles, dull or polished aluminium) and technology to provide a full range of various interiors for all market segments; ISO 9001:2008; ISO/TS 16949:2009; Highly qualified personnel. 	Renault, Autovaz, Nissan, Ford, Peugeot, Citroen, Volkswagen and Mitsubishi

AUTOMOTIVE COMPONENTS MANUFACTURERS IN ST PETERSBURG: OOO TI Automotive, OOO Hanil Rus, OOO Lear, OAO Uzor, ZAO NPP Filter Materials, OOO Mobis Module CIS, ZAO Johnson Controls International, OOO Donghee Rus, OOO Doowon Rus, ZAO Intercos-IV, ZAO PC Autocomponent Kolpino, OOO Piterform, OAO Autoarmatura, OOO Big Filter, OOO PO Avto-radiator, ZAO Autocomponenty i oborudovaniye, OOO Metalloproduktzia, ZAO Zavod Reductor, OOO Elast-Technologii, OOO Tenneco Automotive Volga branch and ZAO HORSE-Silicon

STATE MEASURES OF SUPPORT FOR THE AUTOMOTIVE CLUSTER'S RESIDENTS

FEDERAL SUPPORT MEASURES

1. Subsidies from the federal budget to Russian manufacturers of wheeled vehicles in order to compensate for a portion of their R&D expenses, as well as engineering and testing of wheeled vehicles (Russian Government Resolution No. 29 of 15 January 2014);
2. Subsidies for a portion of expenses for the use of energy resources by energy-intensive automotive enterprises (Russian Government Resolution No. 30 of 15 January 2014);
3. Subsidies to compensate a portion of expenses associated with issuing and supporting warranties for wheeled vehicles under Euro-4 and Euro-5 standards (Russian Government Resolution No. 31 of 15 January 2014);
4. Subsidies to Russian manufacturers of wheeled vehicles in order to maintain employment of workers (Russian Government Resolution No. 32 of 15 January 2014);
5. A special-purpose loan for a period of five to seven years with an interest rate of 5% per annum in order to finance engineering and manufacturing projects, as well as create new manufacturing facilities, provided by the Industry Development Fund;
6. Concessional lending as part of the Investment Projects Support Programme approved by the Russian Government Resolution No. 1044 of 11 October 2014.

TAX INCENTIVES FOR INVESTORS

Tax incentives are regulated by Law No.113-oz «On Government Support for Organisations Investing in Leningrad Region and on Amending Certain Legal Acts»

THE TIMEFRAME FOR REVIEWING, APPROVING AND SIGNING AN AGREEMENT FOR PROVISION OF GOVERNMENT SUPPORT FOR AN ENTERPRISE COMES TO **35 DAYS**

REDUCTIONS IN TAXATION



REGIONAL SUPPORT MEASURES

Tax benefits for trading activity

Legal basis for support:

1. Law of Leningrad region «On Measures of State Support for Trading Activity in the Territory of Leningrad Region» No. 10-oz of 08.04.2002;
2. Resolution of the Government of Leningrad region «On Approval of the List of Several Types of Goods Sold in Accordance with Regional Law On Measures of State Support for Trading Activity in the Territory of Leningrad Region» No. 158 of 05.09.2002;
3. Bylaws which determine order of granting subsidies to organizations carrying out trading activity.

Advantages of carrying out trading activity in Leningrad region:

- there are no similar measures of support granted to trading activity in any other subjects of the Russian Federation;
- favourable investment climate of Leningrad region, its geographical location and foreign economic relations allow actively developing trading activity;
- consulting and information support to organizations before receiving benefits and during the term of a contract.

BENEFITS FOR TRADERS



1. REDUCTION OF CORPORATE TAX

13.5% instead of 18% included in the budget of Leningrad region

2. SUBSIDIES

Profit

- up to RUB 10 million
- from RUB 10 million to RUB 60 million
- from RUB 60 million to RUB 100 million
- from RUB 100 million

Subsidy

10% of corporate tax
RUB 135,000 and 20% of corporate tax
RUB 1,485,000 and 30% of corporate tax
RUB 3,105,000 and 35% of corporate tax

CONDITIONS FOR RECEIVING STATE SUPPORT

- Registration in Leningrad region
- Average monthly revenue over the current year exceeds RUB 100 million
- Goods sold are included in the list affirmed by the resolution of the Government of Leningrad region No. 158 of 05.09.2002 «On Approval of the List of Several Types of Goods Sold in Accordance» with Regional Law «On Measures of State Support for Trading Activity in the Territory of Leningrad Region»

ADMINISTRATIVE SUPPORT FOR INVESTMENTS

FRONT OFFICE FOR INVESTOR RELATIONS OF THE ADMINISTRATION OF LENINGRAD REGION — «ONE-STOP-SHOP» SUPPORT FOR INVESTMENT PROJECTS

Investors face various problems in the implementation of investment projects: starting from the need to carry out market studies and assessments to interaction with regional authorities and obtaining necessary permits. These issues are especially relevant bearing in mind the specific nature of doing business in Russia for foreign companies. To create an environment in which the fullest possible support and assistance is provided to businesses and investors, Front Office for Investor Relations of the Administration of Leningrad Region was set up, which functions as a «one-stop-shop» to provide support to investment projects in the region.

FOCUS AREAS OF FRONT OFFICE



INFORMATION AND CONSULTING SUPPORT FOR INVESTORS

- providing information about government support
- creating talent pools and other data required for carrying out investment projects
- providing other necessary information



SELECTING SITES ACCORDING TO THE REQUIREMENTS OF SPECIFIC INVESTMENT PROJECTS

- industrial parks
- greenfield/brownfield projects
- state property
- organisation of site visits



PROVIDING ENGINEERING AND TRANSPORT SUPPORT

- analysing opportunities to provide engineering and transport support for land plots
- calculating costs and organising procedures for utility connections, as well as construction of access roads
- providing information about tariffs, etc.

INVESTOR REQUEST



MEETING IN FRONT OFFICE

Investment project presentation.
Presentation on Front Office's services.



FILING AN APPLICATION FOR ASSISTANCE

Brief project description.
All information provided by investors is confidential.

The timeframe for reviewing an application is **5 days**



SIGNING AN AGREEMENT ON SUPPORT FOR INVESTMENT PROJECTS

Types of investment project support:
Information and advisory assistance.
Selection of an investment site.
Providing assistance in engineering and transport support.

The timeframe for reviewing an application is **5 days**



SUPPORT FOR INVESTMENT PROJECT

Providing support in finding an investment site.
Consulting on the availability/potential connection to/cost of infrastructural support at sites.
Providing assistance in obtaining documentation issued by municipal, regional and federal authorities.
Consulting on matters related to the acquisition of titles to land plots; consulting on urban planning documentation.
Making changes to site designs.
Consulting on current legislation.
Consulting on existing government support measures in the region.

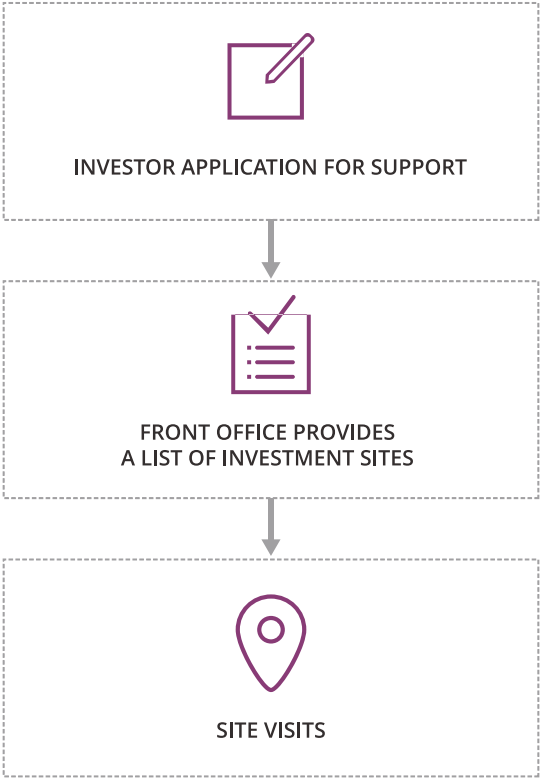
OPTIMISING THE TIMEFRAME FOR LAUNCHING AN INVESTMENT PROJECT

The stage when investors select a land plot may significantly increase organisational, time and financial costs at the start of production. Accordingly, the availability of investment plots with access to utilities and transparent

land title, as well as an effective mechanism to acquire or rent a land plot, may become the most important factors in making a decision on localising production in the region.

SELECTING AN INVESTMENT SITE

Finding an investment site that meets the requirements of specific investment projects, providing accurate and objective information about the level of engineering support for investment sites, etc.



The application contains a short description of the project and a set of requirements for the investment site: site type (Greenfield, Brownfield), size, required engineering and transport infrastructure, hazard class of operations, etc. All information provided by investors is kept confidential.

Timeframe – three working days.

A list of investment sites that meet the investor's request. If there are no sites that fully match all of the required parameters, information about the most suitable sites is sent to the investor.

After the investor studies the alternative investment sites, Front Office then agrees site visits with owners/tenants in order to come to a final decision on the location of production facilities (administrative, infrastructure, warehouses, etc.).

THE CLUSTER'S TRANSPORTATION, BUSINESS AND UTILITY INFRASTRUCTURE

OVERVIEW OF LENINGRAD REGION'S RAIL INFRASTRUCTURE

Railway transport is the backbone of Leningrad region's transportation system. It accounts for the bulk of cargo and passenger traffic, including long distance transport. Furthermore, railways account for **83%** of cargo and **40%** of passenger traffic in the region. The length of railway tracks passing through the region comes to over **3,000** square km, out of which **1,600** km are electrified. The network density comes to **32** km per **1,000** sq.km. In addition, **37** terminal railway stations, 80 stations and over **200** passenger platforms are located throughout the region.



In the 3rd quarter 2015

total cargo forwarded by rail transport in Leningrad region was 21.5 million tonnes.



the number of passengers travelling by public suburban railways in the region was 20.2 million people with passenger turnover coming to 2.8 million passengers/km.

The strategic development of railways in the region helps meet the transport needs of seaports, the local economy and residents. In addition, this also ensures new, high quality passenger transport. For this purpose, OAO Russian Railways is now carrying out the following major investments projects:

- overall reconstruction of the Mga–Gatchina–Veimarn–Ivangorod railway section and lines leading to ports on the southern shore of the Gulf of Finland;
- construction of the new Losevo–Kamennogorsk line for the movement of cargo traffic to ports on the Gulf of Finland;
- operation of high-speed passenger trains between St Petersburg and Moscow;
- operation of high-speed passenger trains between St Petersburg and Buslovskaya.
- development of the Svetogorsk–Imatra multiway railway checkpoint.





OVERVIEW OF ROAD INFRASTRUCTURE IN LENINGRAD REGION

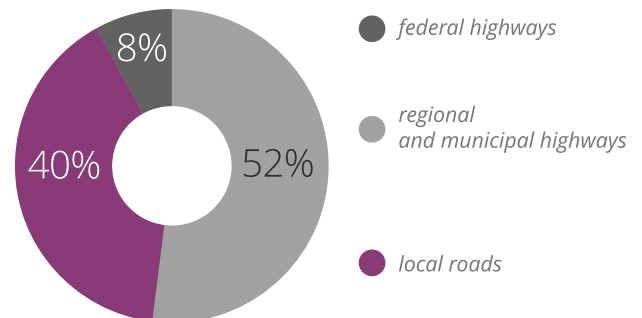
Leningrad region has a developed network of public roads. Their total combined length comes to around **19,000 km**, with **8%** being federal highways, **52%** as regional and municipal highways, and **40%** as local roads.

Based on the length of its public roads, Leningrad region ranks second in the Northwestern Federal District and fourth in the Russian Federation in terms of road density per **1,000 sq km**.

High demand for transportation via Leningrad region's highway network is driven by such factors as the proximity of St Petersburg, as well as the Trans-Siberian and South-North international transportation corridors that pass through the region. In addition, the development of ports on the Baltic coast and existing international car checkpoints at the Russian state border with such EU countries as Finland and Estonia are also very important factors in this regard.

Automobile transport provides connections between different types of terminals (sea and river ports, railway stations, airports), border checkpoints, production and consumption centres, and places of residence.

TOTAL COMBINED LENGTH OF PUBLIC ROADS COMES TO AROUND 19,000 KM, WITH:



AVAILABILITY OF A SKILLED WORKFORCE IN THE REGION

One of the important issues for the efficient operation of automotive companies is staffing. Leningrad region currently has certain reserves in regards to its workforce. This can be an advantage for both existing businesses and planned facilities from various industries, including the automotive industry.

In addition, Leningrad region's employment agency organises training for professions that are in-demand at automotive companies, including: mechanical assembly operators, manual welders, loader operators, class C, D and E drivers, CNC machine operators, etc.

The employment agency annually holds career and education fairs together with higher and secondary vocational educational institutions to provide career guidance to young people and tell them about prospective jobs in the region, including within the automotive industry.

AVERAGE WAGE

IN THE LENINGRAD REGION, 2015 1Q

average nominal wage paid
in Leningrad region:
RUB 32,817



by type of activity:
production
of vehicles
and equipment —
RUB 39,349.

AVAILABILITY OF DEDICATED INSTITUTIONS

In the 2014/2015 academic year, 28 independent vocational institutions and eight branches trained 12,600 students to become mid-tier professional employees. Furthermore, an independent higher education institution and 23 branches are training 11,300 students to be specialists with higher degrees.

List of local vocational institutions able to train staff for the Automotive and Auto Components Cluster:

- Aleksandrovsky Polytechnic College in Vyborg;
- Priozersk Polytechnic College;
- Kingisepp Technology and Service College;
- E.I. Lebedev Industrial and Technical College in Tikhvin;
- Podporozhye Polytechnic College;
- Slantsy Industrial College;
- Tosno Polytechnic College;
- Kirishi Polytechnic College, Kirov Polytechnic College;
- Volkhov Aluminium College;
- Water Transport College in Shlusselburg;
- Bor Agroindustrial College;
- Sosnovy Bor Polytechnic College;
- Polytechnic College in Svetogorsk;
- State Institute of Economics, Finance, Law and Technology;
- Lodeynopolsky Industrial Engineering College.



SWOT ANALYSIS OF THE AUTOMOTIVE CLUSTER

STRENGTHS

- a system of government support measures and investment infrastructure is in place;
- presence of major automakers in St Petersburg and Leningrad region: Nissan, Ford, KIA, Hyundai, MAN, etc.;
- 14 industrial parks providing over 6,000 ha of ready land plots;
- availability of a skilled workforce;
- strong regional educational base (proximity of research institutes, universities and technical institutions);
- availability of additional available production capacities at plants;
- advantageous geographical location with access to key markets;
- developed transport infrastructure with high reserve capacity (seaport, highways, air routes and railway lines).

OPPORTUNITIES

- investments from foreign suppliers in regional and local businesses, as well as joint ventures;
- technological modernisation of production capacities;
- development of an engineering services sector along with the region's innovation and industrial potential;
- development of cooperation between component manufacturers and assembly plants in regards to engineering solutions.

WEAKNESSES

- use of outdated equipment and machinery at enterprises;
- lack of a regional communication platform to support business development;
- low awareness of the part of component manufacturers about automaker requirements;
- absence of a high quality engineering services sector;
- lack of companies with ISO/TS 16949 certification;
- insufficient interaction and communication between enterprises in the Cluster.

THREATS

- potential market losses due to outdated technology and competitive weaknesses;
- market fluctuations and negative financial implications of the economic crisis and sanctions imposed by foreign countries;
- competition from other Russian regions (Kaluga, Nizhny Novgorod, Samara, Tatarstan, etc.);
- relocation of car and components production to regions and countries with lower costs (China, India, etc.).



CONTACT DETAILS

FRONT OFFICE FOR INVESTOR RELATIONS

OF THE ADMINISTRATION OF LENINGRAD REGION

Economic Development Agency of Leningrad Region — Public Institution

«One-stop-shop» service for assisting investment projects and promoting the region's investment climate in Russia and abroad

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