



Invest  
in Pomerania



WE CARE MORE



- POMERANIA IS LOCATED IN NORTHERN POLAND
- THE REGION IS INHABITED BY 2,23 MLN PEOPLE
- THE BIGGEST ECONOMIC CENTER IS TRI-CITY (GDANSK, GDYNIA AND Sopot)



# POMERANIA IN FIGURES

POPULATION\*

2,28 mln

AREA

18 300 km<sup>2</sup>

LARGEST BUSINESS CENTRES

Tri-City (Gdansk, Gdynia, Sopot)

NUMBER OF ENTERPRISES

In total: 271 784\* with foreign capital 1 406\*\*

CARGO TURNOVER IN SEAPORTS IN 2014

51.685 million of tons

LECH WALESIA INTERNATIONAL AIRPORT

Number of connections to Scandinavia  
(weekly): 102

Number of airlines: 8

Number of passengers handled in  
2014: 3. 288 million

\* Central Statistical Office, 2013

\*\* Central Statistical Office, 2012



# POMERANIA IN FIGURES

RESEARCH & DEVELOPMENT CENTERS

ca. 65 (about 4000 employees)

AVERAGE REMUNERATION (GROSS) III 2015\*

PLN 4370,53 (ca. EUR 1065)

NUMBER OF STUDENTS / ACADEMIC YEAR 2013/2014

99 740

POPULATION GROWTH RATE IN 2013\*

First place in Poland

LIFE ATTRACTIVENESS\*\*

First place in Poland

\*

Central Statistical Office

\*\*

Social Diagnosis 2013 Ranking of Przekroj magazine of 2013





- FAVORABLE COASTAL LOCATION
- HIGHLY SPECIALISED PERSONNEL
- MODERN BUSINESS INFRASTRUCTURE
- DYNAMICALLY DEVELOPING ECONOMY
- ATTRACTIVE PLACE TO LIVE

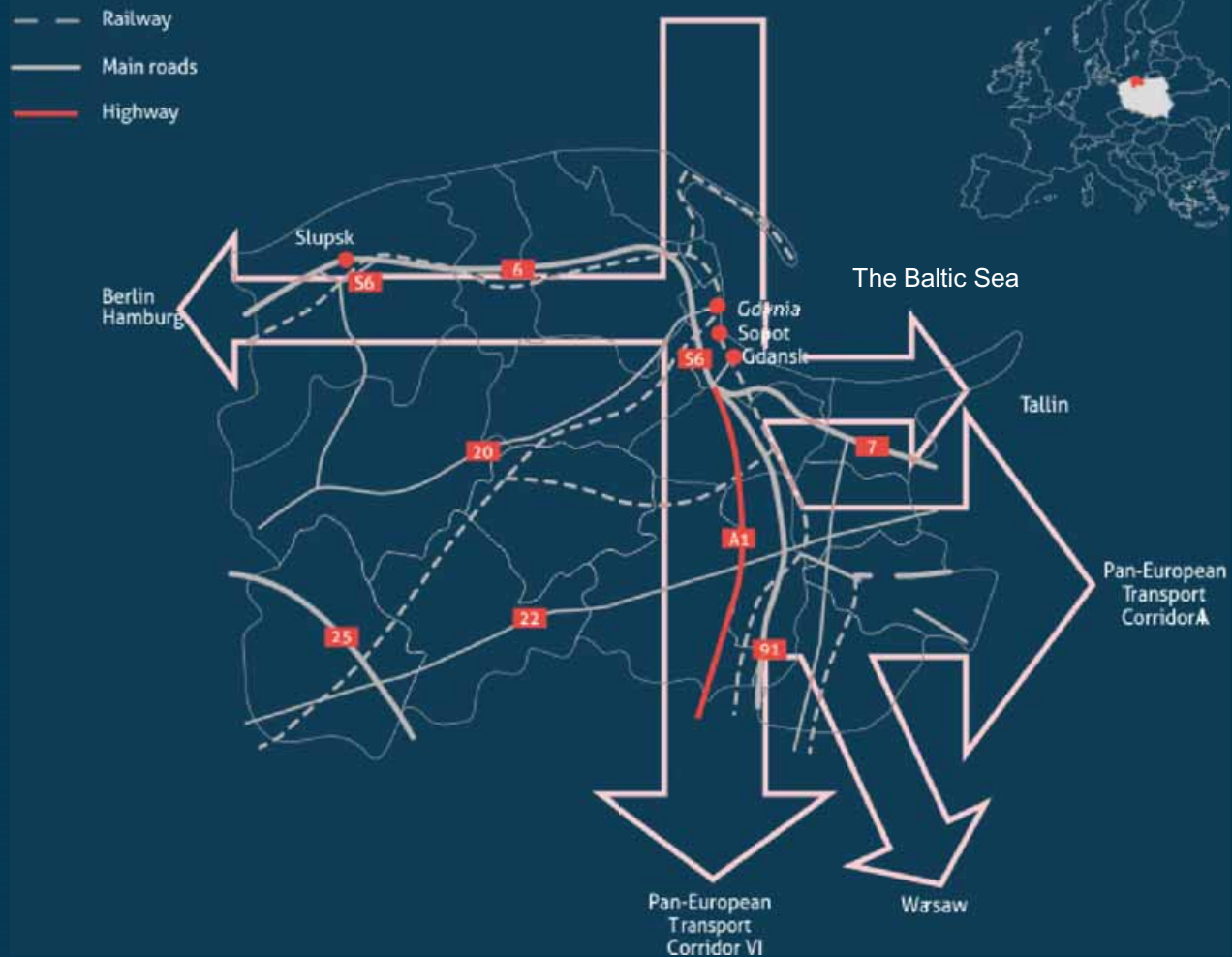


# FAVORABLE COASTAL LOCATION





# MAP TRANSPORT CORRIDORS IN POMERANIAN REGION



FAVORABLE GEOGRAPHIC LOCATION AT THE CROSSROAD OF KEY  
PAN-EUROPEAN TRANSPORT CORRIDORS



Photo. Deep Water Container  
Terminal Gdansk

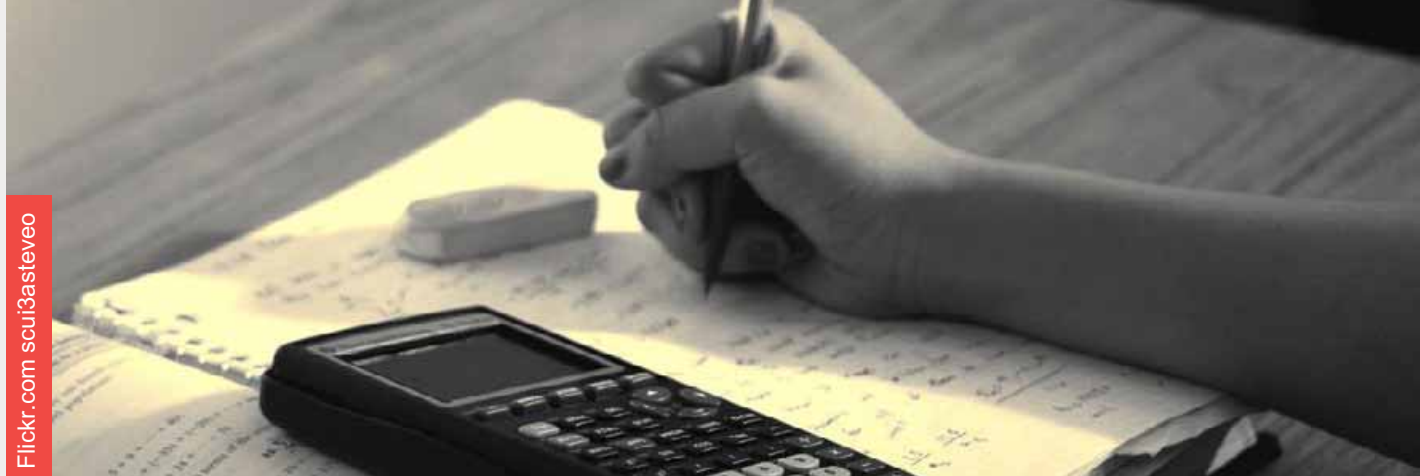


ACCESS TO DYNAMICALLY DEVELOPING  
SEAPORTS









## HIGHLY SPECIALISED PERSONNEL



# LARGE CATCHMENT AREA

## TALENT POOL MULTIPLIED



In opposite to Southern and Central Poland, Northern part of the country is concentrated around one economic hub.

Due to the unique seashore location, Tri-City with its vivid labor market attracts newcomers from neighboring regions and does not face a harsh competition over talent.

Catchment Area	
Population	7,5 M
No. of students	300 949
No. of graduates	83 886

Source: CSO



In opposite to Southern and Central Poland, Northern part of the country is concentrated around one economic hub.



Direction of migration towards Pomerania

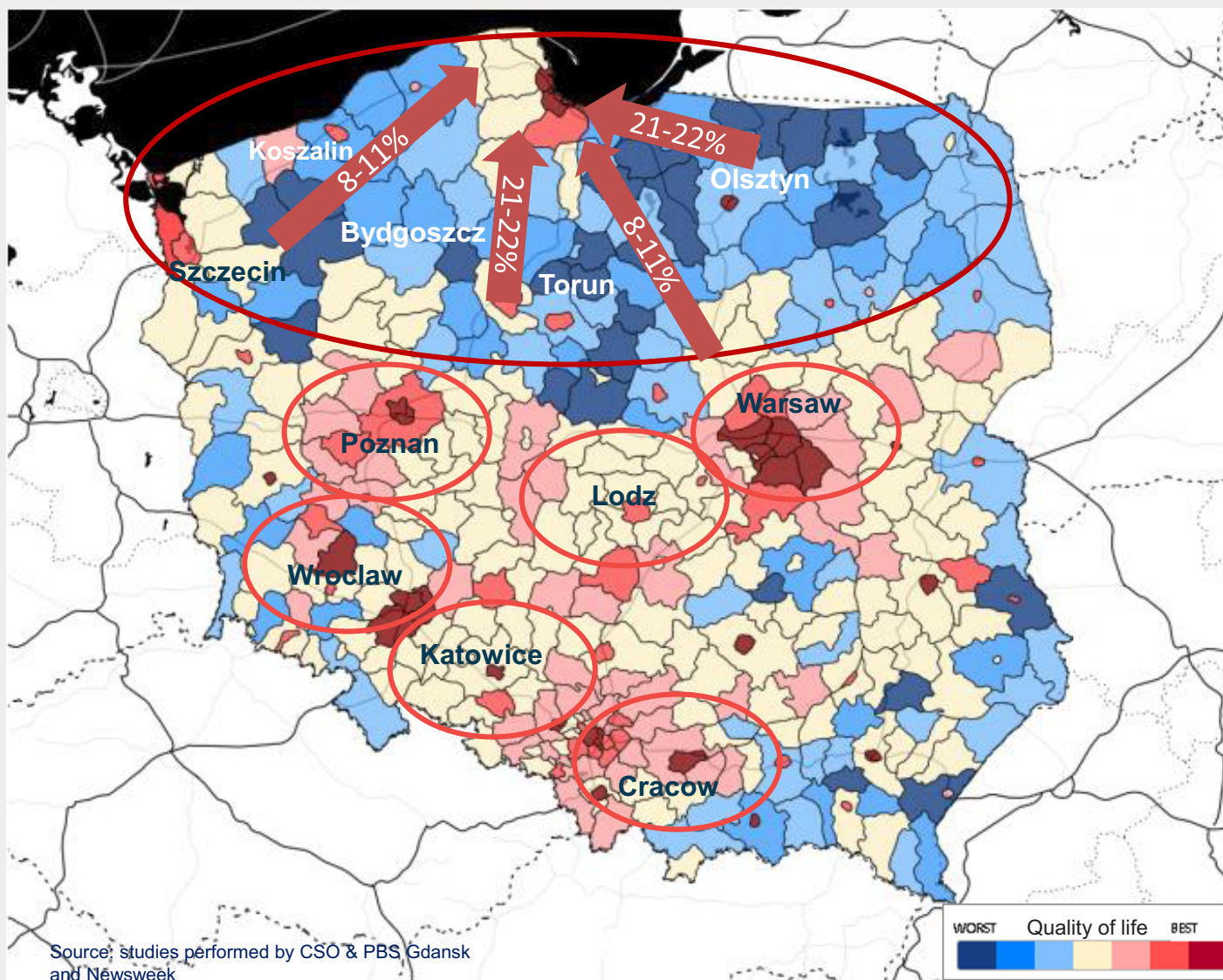
#### Catchment Area

Population	7,5 M
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# LARGE CATCHMENT AREA

## TALENT POOL MULTIPLIED



## POMERANIAN UNIVERSITIES EDUCATE PERSONNEL FOR KEY SECTORS OF THE ECONOMY

Main higher education institutions	Number of students
University of Gdansk	27 640
Gdansk University of Technology	24 781
Naval Academy in Gdynia	6 342
Medical University of Gdansk	5 162
Pomeranian Academy in Slupsk	3 306



According to Central Statistical Office,  
in academic year 2013/2014 there were 27  
Universities in Pomerania Voivodeship, almost 100 000 students  
and nearly 28 000 graduates.





# MODERN BUSINESS INFRASTRUCTURE



# TRI CITY OFFICE SPACE MARKET

## TENANT FAVORABLE MARKET

Supply of office space (sq.m.)	470 000
Vacant space (sq.m.)	42 000
Base rents in prime locations (EUR/sq.m./month)	12,50 . 13,50

*Source: Jones Lang LaSalle*





## DYNAMICALLY DEVELOPING ECONOMY



## SIX PRIORITY SECTORS OF POMERANIAN ECONOMY

BPO / SSC - Outsourcing

ICT . teleinformatics

Energy

Logistics

Automotive

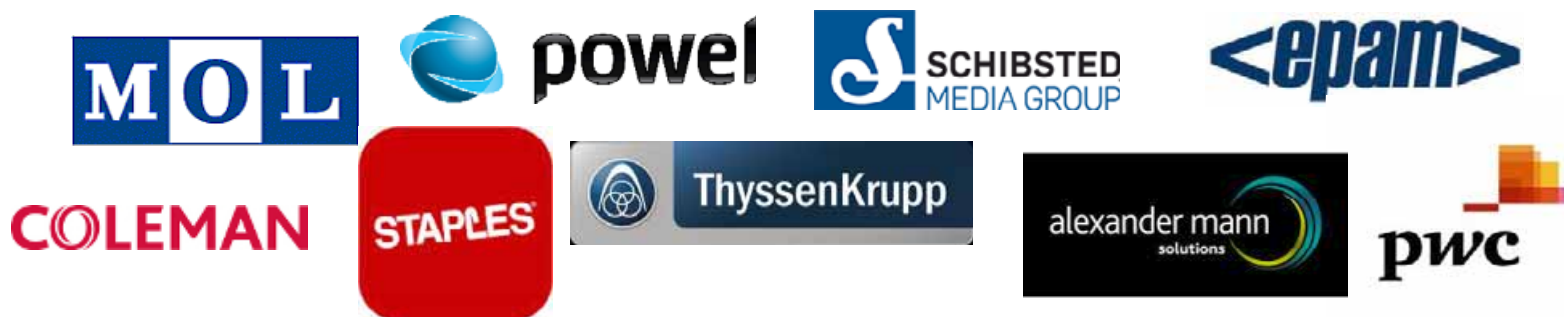
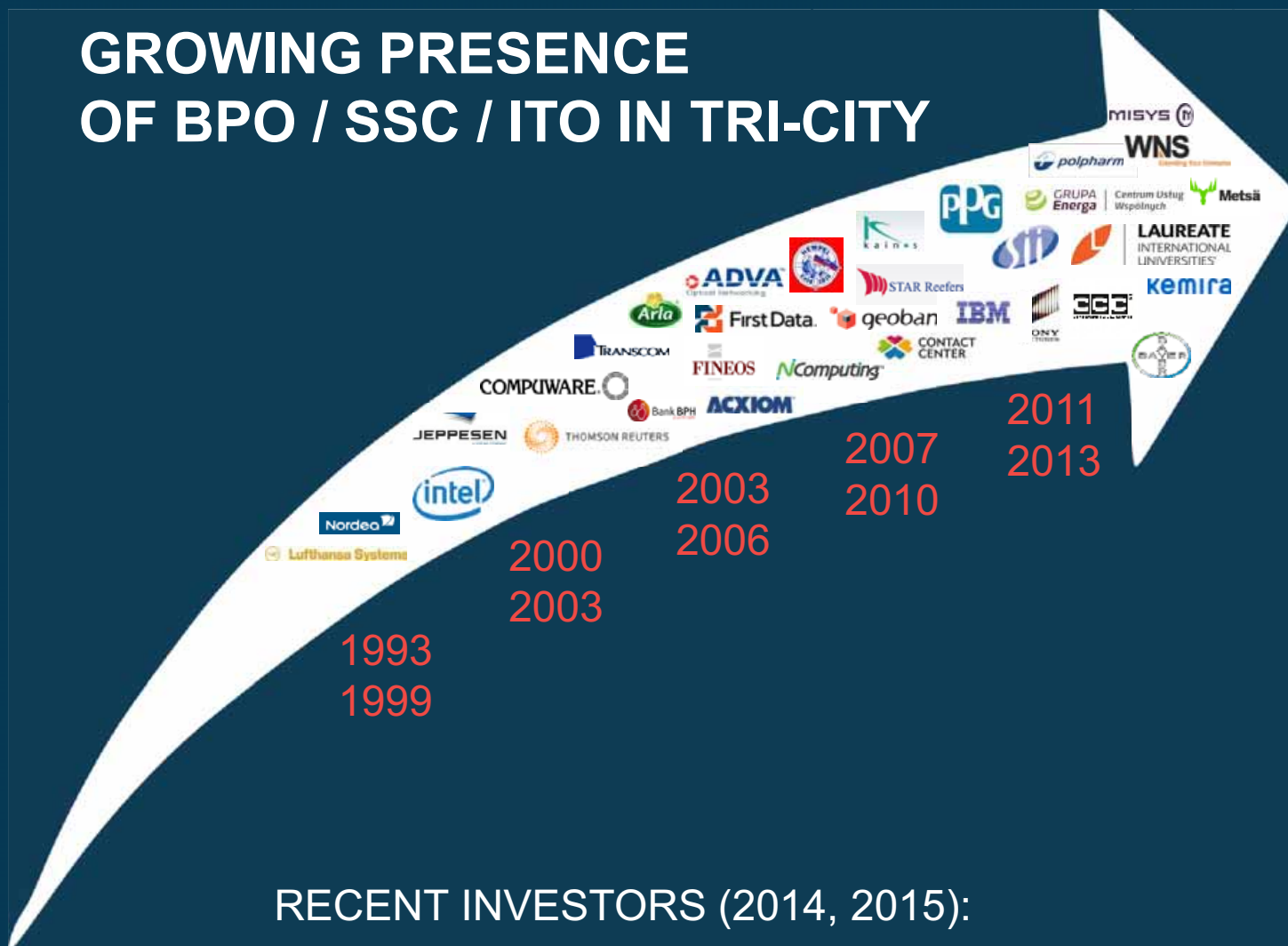
Light chemistry industries

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conducted.

The study prepared by PwC and IBnGR indicated six industry sectors with the highest potential in attracting foreign investments.



# GROWING PRESENCE OF BPO / SSC / ITO IN TRI-CITY





# BPO/SSC SECTOR

- § No. of service centers . **44**
- § Employment in service centers . ca. **14 500** (including Polish and foreign companies)
- § No. of centers with finance-related services - **23**
- § Employment in finance centers . **6 110**
- § Employment in finance sector . **38 000 +**
- § Employment in operations support - **50 000+**

No. of students/ graduates:

§ Economics & Finance	24 000+ / 7 500+
§ Business & Administration	21 000+ / 6500+
§ Finance & Accounting	5500+ / 2000 +
§ Philology	3000+ / ~1500
§ Logistics & Chain Supply	2800+ / ~ 400



# MAJOR LANGUAGES IN TRI-CITY

## USED IN CENTRES AND PROVIDED BY UNIVERSITIES

- English
- German
- Spanish
- French
- Russian
- Norwegian
- Swedish
- Finish
- Danish
- Italian
- Portuguese
- Slovakian
- Czech
- Ukrainian
- Hungarian
- Hebrew

Source: own research

**Thomson Reuters**  
**Center of Excellence serve**  
**34 languages**

**Over 59% of all graduates of Nordic languages in Poland originate from the region.**

Source: ABSL Report 2011



KNOWLEDGE OF FOREIGN LANGUAGES DECLARED BY STUDENTS IN TRI-CITY

Source: Study on Human Capital



# IT SECTOR

**4 000 companies in ICT sector**

(including IT, ITO, R&D, electronics, telecommunication )

**25 000 people employed in the sector**

(including IT, ITO, R&D, electronics, telecommunication)

**10 000 IT professionals employed in the sector**

(software development, IT support, IT specialists)

**6000 - 7000 Software Developers (programmers)  
employed in the sector**

(Outsourcing (ITO), in-house development, R&D activity)

*Source: CSO and own research*

## Student talent pool (approx.):

- § No. of students (IT) . 4400
- § No. of graduates (IT) - 1000
- § No. of students (Math & Statistics) . 1 200
- § No. of graduates (Math & Statistics) - 500

*Source: CSO*





## WHY WORK TOGETHER WITH REGIONAL ICT SECTOR?

- Best ICT Cluster in Poland;
- 64 R&D Centres (almost 4000 people employed);
- 5th ICT market in Poland (in terms of sales);
- Universities preparing well educated staff ;
- Over 4000 companies operating in the sector;
- Large supply of modern office space;
- Large labor pool . 20 000 people employed in the sector;
- In 2010 export of IT products and services of ICT sector totalled PLN 4.1 billion;
- 2 Science and Technology Parks providing comfortable conditions for developing innovative ideas and building the business;
- Industry and Technology Park in Kwidzyn;
- A number of Business Incubators focused on supporting innovation;
- More than 1/6 of regional export is generated by ICT companies, which is significantly higher than the national average.





# FUTURE TECHNOLOGY IS BEING CREATED IN POMERANIA

- Intel R&D centre in Gdansk is the largest one in Europe and second in terms of size globally;
- Intel Technology Poland employs more than 1000 employees and it is constantly developing. Intel in Pomerania, based mostly on personnel recruited from Gdansk University of Technology, works on technologies that will be available on the market in 4 to 5 years.







# POMERANIA OFFERS GREAT POTENTIAL FOR WIND ENERGY

## RENEWABLE ENERGY SOURCES

- Major potential in development of technologies and production of installations in RES sector;
- Shipbuilding companies' services are intended for offshore energy sector. For instance GSG Towers Company produces 200 wind turbines towers, Crist SA shipyard produces vessels designed for offshore market;
- Academic facilities and qualified personnel in shipbuilding and metallurgy;
- Rich offer of locations with access to the sea that can be used for offshore wind sector.





## POMERANIA TARGETS RES

### INVESTMENTS WITHIN THE RENEWABLE ENERGY SECTOR

#### Wind Power:

- Installed capacity 312,03 MW (2013)
- Planned investments on land: about 1200 MW
- Planned investments at sea: about **1500 MW**

#### Biogas Power:

- Installed capacity 14,4 MW (2013)
- Planned investments till 2025: 2,2 GW (up to 150 installations)





# LOGISTICS

- The Pomeranian region has the exceptional potential in logistics which stems first of all from the excellent geographic situation. The region is an integral part of the Trans-European Transport Network (TEN-T);
- It is located at the crossing of two pan-European transport corridors. The VI corridor connecting Scandinavia with Southern Europe via Katowice and IA corridor which connects the Pomeranian region with the Baltic states (Lithuania, Latvia and Estonia);
- The region offers extensive road and rail infrastructure, in particular the connections between the Baltic and the Adriatic Sea.







## PORTS . LOGISTIC GATEWAY

- The ports of Gdynia and Gdansk handle all types of cargo. Sea transport from Pomeranian ports includes all world directions;
- Pomerania was ranked second among the ports of the Baltic Sea in terms of container handling (over 2.061 m TEU);
- DCT Gdansk is the most modern container terminal in the region of southern Baltic;
- Weekly connections with Asia are operated by the largest transport vessels in the world (18 000 TEU) within the AE10 Maersk Line service.
- In order to meet a growing demand for deep-sea services in Central Europe, in January 2015 DCT Gdansk started construction works of second terminal. The investment project will expand annual handling capacity to 3 million TEU. The construction works will last 19 months. The estimated value of the project is " 290 million.





# PORTS = INFLUX OF INVESTMENTS

Extension of storage facilities located in the vicinity of port of Gdansk, Gdynia and main communication junctions of the region.

## PORT OF GDYNIA:

- Opening of the Rolls Royce marine service center, which uses storage facilities;
- Construction of the state-of-the-art Logistic Centre in the western part of the port.

## PORT OF GDANSK:

- Along with Goodman, the DCT implements the concept of Port Centric Logistic, on the basis of the London standard (integrates ports and logistic functions).







## AUTOMOTIVE

- Pomerania, thanks to its favorable geographical location and efficient sea transport, is becoming an important exporter of automotive industry products;
- According to PwC data more than 171 car manufacturing plants operate within the range of Pomeranian ports;
- One of the greatest achievement of the R&D facility of EATON in the city of Tczew is the development of the hybrid transmission technology;
- THEY ALREADY TRUSTED US: EATON TRUCK COMPONENTS . EATON AUTOMOTIVE . DELPHI - GARDNER . SCANIA . KAPENA . FEDERAL MOGUL . NORDGLASS.

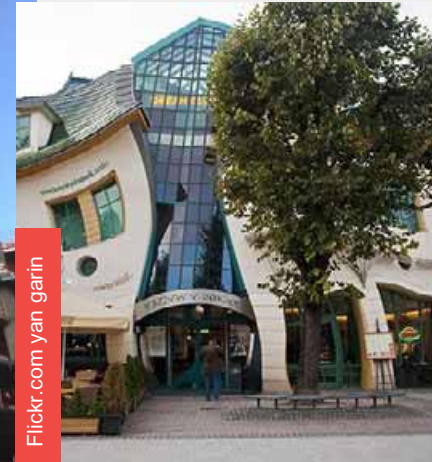




# LIGHT CHEMISTRY

- The analysis of global flows of direct foreign investments revealed that 15% of all investments in the light chemistry industry sector in Central and Eastern Europe flowed in 2003-2012 to Poland;
- The unique location of the region as well as access to all types of transport made Pomerania an export gate to the countries of CEE;
- Three universities in Pomerania offer higher education in biotechnology. In total, approx. 4000 people study biotechnology, chemistry and other faculties related to biotechnology;
- Polpharma S.A. headquarters, which is the largest manufacturer of medicine in CEE, is located in Pomerania.





## TRADITIONAL ECONOMY SECTORS ARE ALSO DYNAMICALLY DEVELOPING:

- Maritime industry
- Food industry
- Wood working and furniture sector
- Refinery industry
- Tourism
- Construction sector .








# ATTRACTIVE PLACE TO LIVE





# QUALITY OF LIFE

## SPORT, EVENTS, CULTURE, NATURE, INFRASTRUCTURE

-  High quality of life (convenient communication network, attractive residential areas)
-  Healthy living conditions (the sea, numerous city parks, green forrest belt in the city)
-  Major cultural & sports hub hosting numerous grand events





- ~~① Prepare the photos for Mrs. Tong.~~  
~~② Purchase of DVD for Mrs. Tong's photo.~~  
~~③ Mail photo CD to:~~  
~~Mrs. Tong~~  
~~Elk 608 Chen Chu Tong~~  
~~St 53~~  
~~\* 09-43 5(680608)~~
- ~~④ Scan Policy schedule for Cassander.~~  
~~⑤ Sort out the schedule for this table.~~
- ~~⑥ Plan for 6-days leave.~~  
~~① 1 Jun 10      ② 5 Jul 2010~~  
~~③ 11 Jun 10    ④ 6 Jul 2010~~  
~~⑤ 21 Jun 10    ⑥ 7 Jul 2010~~
- ~~⑦ Prepare new signs for hipster PDA.~~  
~~⑧ Brief Tony on the procedure for group association.~~  
~~⑨ Check the bed situation in Affix down → clear unwanted beds.~~  
~~⑩ Follow up on Sam Low's working schedule for June.~~
- ~~⑪ Update & re-schedule.~~  
~~⑫ Email Tony aft the date for leave application.~~  
~~⑬ Print out training document for Jo Tong.~~  
~~⑭ Order big kitchen cabinet in Sugar.~~  
~~⑮ Update Tony aft the Chris phone.~~  
~~⑯ Check fruits situation.~~  
~~⑰ Create invoice for Tris line to email her that 2nd part of invoice will be given when the - clear.~~

# OUT ÚŠÒNÒÁÐ XÒÙVU ÜÙq SUPPORT



# INVEST IN POMERANIA

## RELIABLE PARTNER IN LOCAL MARKET

### We support our investors on every stage of the investment process:

- § Decision making process
- § Organising visits (site,reference etc.)
- § Site selection
- § Start-up phase
- § Day-to-day operations

### All investors are offered:

- § Dedicated Project Manager
- § Market research services
- § Our network
- § Promotion and employer branding support
- § After Care services



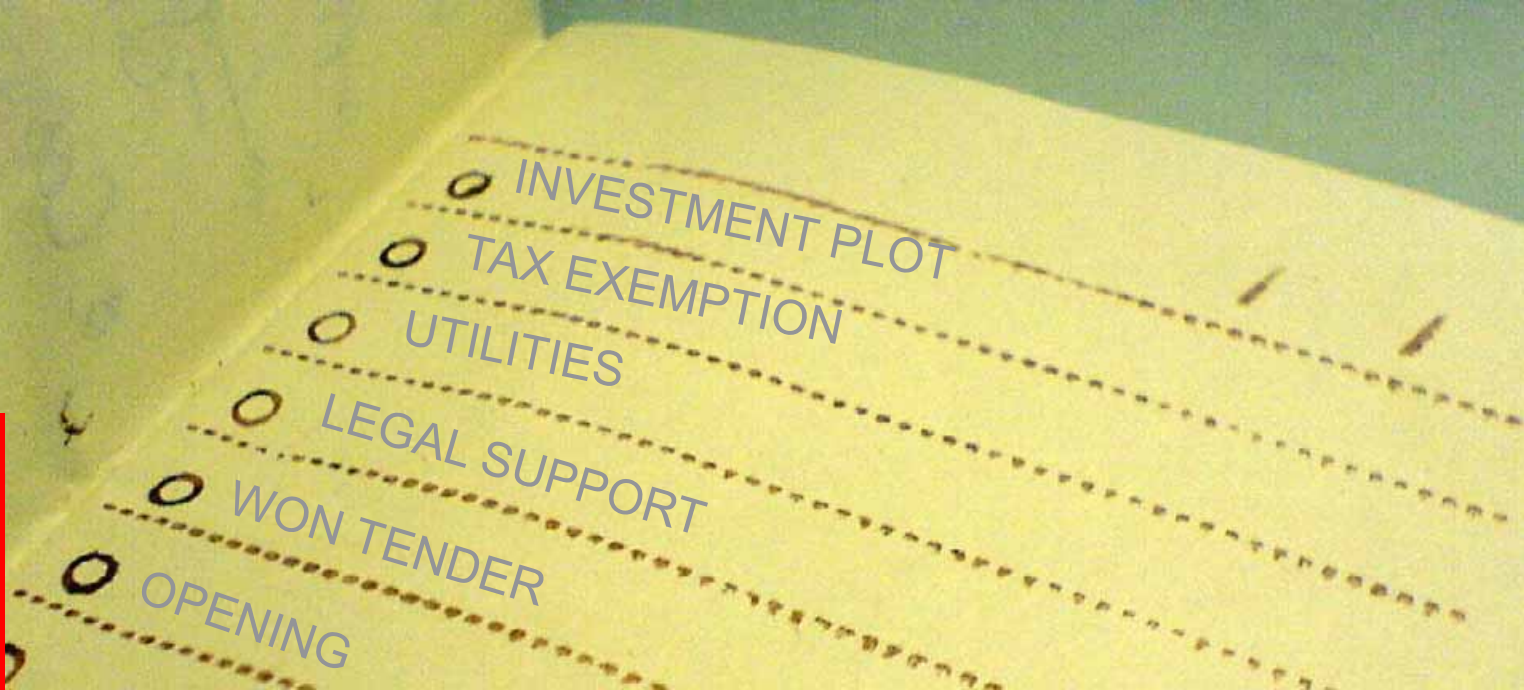


# GDANSK SCHOLARSHIP PROGRAMME

- The Gdansk Scholarship Programme is a unique mechanism, available only for investors who wish to place their foreign operations in Gdansk;
- The mechanism provides financial assistance for Polish and foreign students training for personnel of newly established businesses;
- The grant covers the costs of training, accommodation, travel and living expenses for the period of 6 months (up to EUR 7 800 per person).







## SUPPORT THROUGH SPECIAL ECONOMIC ZONES

THERE ARE TWO SPECIAL ECONOMIC ZONES IN POMERANIA, WHICH OFFER ATTRACTIVE CONDITIONS FOR INVESTORS

- Slupsk Special Economic Zone . 160ha available - specializations: automatic, logistic, transport;
- Pomeranian Special Economic Zone - 374ha available . specializations: electronics, chemistry, construction;
- Administrator: Baltic Industrial Park . available plot of former shipyard of Gdynia.



## A SPECIAL TAX EXEMPTION IS PROVIDED

### CONDITIONS OF SUPPORT PROVIDED BY SPECIAL ECONOMIC ZONES:

- The size of tax exemption depends on the value of investment or the number of jobs created;
- The business must be conducted for at least 5 years beginning from the date of investment (3 years for small and medium enterprises);
- The sum of the tax exemption may not exceed the limits under the EU regulations on regional aid;
- Minimum investment - EUR 100 000.







## WELL PREPARED INVESTMENT PLOTS

SPECIAL ECONOMIC ZONES OFFER:

- Investment plots equipped in full technical infrastructure;
- Income tax (PIT or CIT) exemptions;
- Assistance with formal aspects of the investment process.



# GOVERNMENTAL GRANTS AND EU FUNDS

## DIVERSE SOURCE OF FINANCING AVAILABE

- Thanks to the access to European Union, Poland including Pomerania, can offer to potential investors support from EU Funds;
- What is more, enterprises can benefit from governmental grants. This form of support is targeted for entrepreneurs planning investments in the national priority sectors;
- The grant is provided on the basis of a bilateral agreement concluded between the Minister of Economy and the investor, pursuant to the Council of Ministers resolution on the establishment of a multi-annual program of support for the completion of the investment.

## NATIONAL PRIORITY SECTORS

- Automotive;
- Electronics;
- Aviation;
- Modern services;
- Research and development;
- Biotechnology;





## SUPPORT OF THE DISTRICT LABOUR OFFICE

- Funding workplace . up to 500% of the average gross wage in the national economy;
- Funding workplace equipment - the amount specified in the contract shall not exceed 500% of the average gross wage in the national economy (condition: employment for at least 12 months full-time employed persons);
- Reimbursement of costs incurred for paid social insurance contributions in respect of employment of an unemployed person - one-time refund after 12 months of employment in an amount not greater than 300% of minimum wage on the date when the person was employed;
- Intervention works - a monthly or every two month refund for the employer of part of the costs incurred for salaries, bonuses and social insurance contributions.



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WE CARE MORE



# WE CARE MORE



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