



Invest in Pomerania



WE CARE MORE



MIECZYSLAW STRUK
Marshal of Pomorskie
Voivodeship

Ladies and Gentlemen,

Development of foreign investments in Pomerania is a key element of economic policy of our region.

Pomerania is one of the most developed regions in Poland. Its attractiveness comes from i.a. favourable geographic location, the largest seaports in the Baltic Sea, expanding international airport and constantly improving, supported by European funds inflow, road network infrastructure.

Pomerania consistently widens its investment offer targeted at foreign companies. Therefore, investors are awaited by fully equipped investment plots, attractive office space and beneficial system of domestic and regional investment incentives.

Our region also has an effective and coordinated investor assistance system, with Invest in Pomerania team providing support. The system, made up of all the major regional partners supporting foreign direct investments, is a unique initiative in Poland.

Companies interested in investing in Pomerania will also find here a highly qualified human resources. In Pomerania there are 28 higher education institutions and lots of technical and vocational schools, which guarantee constant availability of suitably skilled employees.

On the other hand, Pomerania intrigues visitors with its over a thousand-year-old cultural and historical heritage. Due to its unquestionable touristic values and scenic landscapes, as well as rich cultural and recreational offer, Pomerania region has been a leader of quality of life rankings in Poland for many years.

Investment attractiveness of Pomerania has already been appreciated by many foreign investors. I am fully convinced that their recommendations and information, presented in our publication, will encourage you to consider our region while searching for new business opportunities.

Welcome to Pomerania!



ŁUKASZ ŻELEWSKI
President of the Board
Pomerania Development
Agency Co

Ladies and Gentlemen,

Pomerania consequently raises standards of foreign investors' assistance. PDA Co., a regional partner of Polish Information and Foreign Investment Agency, initiated the establishment of Invest in Pomerania – an initiative which unites all major institutions in the field of foreign investors' assistance in Pomorskie Voivodeship. Experience and knowledge of our partners and PDA Co. itself guarantees professional support for investment projects at the initial phase and in the form of investment aftercare services for companies which already exist in Pomerania.

We provide a database of investment offers in Pomorskie Voivodeship and organize visits of potential investors in cooperation with our regional partners. We are also a primary source of economic information which are prepared according to investors requirements. Moreover, we provide companies which already operate in our region with further information and support in problem solving as well as in implementation of development strategies.

The publication, which you hold in front of you, presents i.a. the latest statistics of the regional economy. It describes also key economic sectors for future development of Pomerania. These sectors were identified in "Analysis of investment attractiveness of Pomorskie Voivodeship", a research conducted by PDA Co. in cooperation with PwC and The Gdansk Institute for Market Economy.

I believe that reading this report will allow you to appreciate the economic potential of Pomorskie Voivodeship and will encourage you to take an interest in investment opportunities in our region.

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DISCOVER A LOCATION IN CENTRAL-EASTERN EUROPE

Pomerania is one of the most dynamically developing regions in Central-Eastern Europe. A number of measures adopted in recent years mean that the region is becoming more and more advanced and attractive every day.

What is the regional recipe for success? It is a result of many factors, such as:

- convenient, seaside location on the crossroads of main European transport corridors,
- consistent investments in infrastructure, science and business,
- young, ambitious and excellently educated staff,
- exceptionally attractive place to live in.

We offer broad support to investors during the investment process and also post-investment care. At each stage of the implementation of a project they may count on the help of the Invest in Pomerania team.

More about support for investors, see page 37

GEOGRAPHIC LOCATION OF POMERANIA





Norway

Sweden

Finland

Estonia

Russia

Latvia

Denmark

Baltic Sea

Lithuania

Russia

Belarus

North Sea

Poland

Netherlands

Belgium

Germany

Ukraine

Luxembourg

Czech Republic

Moldova

Slovakia

Switzerland

Austria

Hungary

Romania

Slovenia

Croatia

Italy

Bosnia and Herzegovina

Serbia

Bulgaria

Montenegro

Kosovo

Macedonia

Albania

Greece

Turkey

POMERANIAN REGION IN FIGURES

Population *	2.29 mln
Area *	18 300 km ²
Largest business centre	Tri-City (Gdansk, Gdynia, Sopot)
Number of enterprises (2013) *	in total: 261 thousand with foreign capital: 1 406 (2012)
Cargo turnover in seaports in 2014 *	51.685 million of tons
Lech Walesa International Airport Gdansk **	Number of regular connections: 54 in low season, 61 in high season
	Number of connections to Scandinavia (weekly) : 81
	Number of airlines: 8
	Number of served passengers in 2014: 3,288 million
R&D centres	around 20 (about 2 000 employees)
Average remuneration (gross) Q1-Q3 2014 *	PLN 4 078,43 [EUR 970]
Number of students in 2013 *	101 914
Number of students (catchment area) *	300 000
Population growth rate in 2013 *	First place in Poland
Life attractiveness ***	First place in Poland

* Central Statistical Office [CSO]

** Data Airport, March 2015

*** "Social Diagnosis 2013", Ranking of Przekroj magazine, 2013

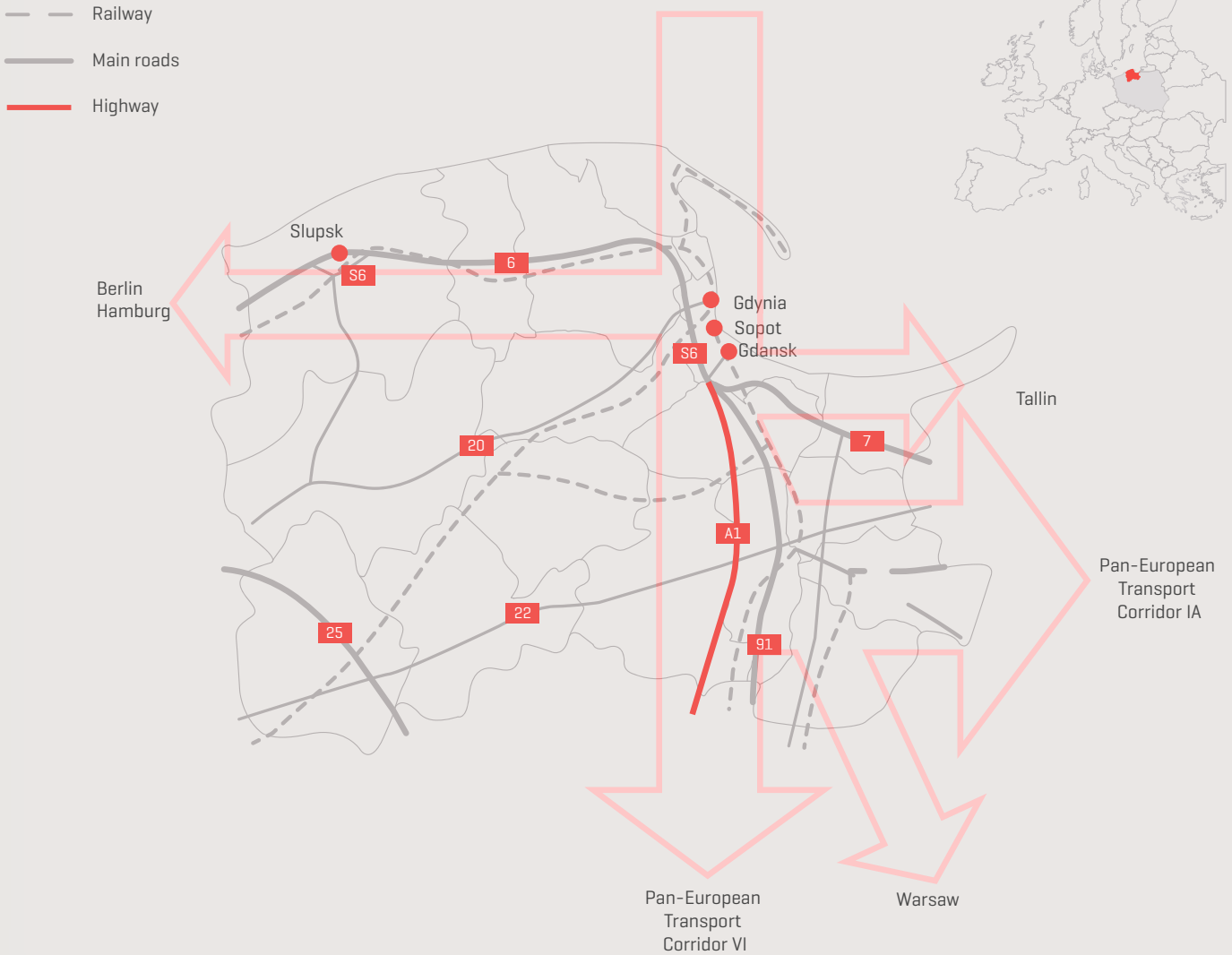
POMERANIAN REGION – A GATEWAY TO THE WORLD

One of the main assets of the region is its favourable geographical situation, which provides excellent transport links. The Pomeranian region is situated in the northern part of Poland, on the southern coast of the Baltic Sea. Two pan-European transportation routes of key importance for transit traffic cross the region:

IA Corridor [Helsinki – Tallinn – Riga – Kaliningrad – Gdansk], which is a branch of the I Corridor [Helsinki – Tallinn – Riga – Kaunas – Warsaw],

VI Corridor [Gdansk – Katowice – Zilina] which connects Scandinavia with Central-Eastern Europe and the countries of the Mediterranean basin.

MAP TRANSPORT CORRIDORS IN POMERANIAN REGION



The Pomeranian region is presently witnessing a construction boom in transportation infrastructure. The numerous investment are a result of the inflow of European Union fund. The development of transport infrastructure makes the region an attractive place for investors.

FLEXTRONICS INTERNATIONAL POLAND



Flextronics International Poland Sp. z o.o. in Tczew was founded in 2000. Currently, in the Industrial Park in Tczew there are two manufacturing plants: electronic and mechanical, serving the key clients. At the moment, Flextronics in Tczew employs over 4 000 people from Pomerania.

The neighborhood of Tri-City research centers results in having direct access to qualified personnel, especially technical faculty's graduates. **Excellent transport links by sea, air and land allow easy contact with customers and suppliers, located all over the world.** An important argument for the development of Flextronics investment in Pomerania is functioning within the Pomeranian Special Economic Zone in Tczew, which offers favorable tax rules which reduce the cost of business activity.

ANDRZEJ POŁOJKO
 General Manager
 Flextronics International Poland Ltd.

FLEXTRONICS

SEAPORTS

Ports in Gdansk and Gdynia are the largest such facilities in the south Baltic Sea region. The increasing number of transhipments and the resulting greater importance of ports in Gdansk and Gdynia as distribution and transit centres are the motivation for numerous investments. Port infrastructure is adapted on an ongoing basis to changing market requirements for handling cargo and vessels, which makes it possible to create different types of cargo. Both ports offer a broad range of services and are capable of reloading of any type of merchandise.

The port in Gdansk offers a state-of-the-art deep-water container terminal on the Baltic Sea - DCT Gdansk. The DCT is a port hub for this part of Europe, a transport gateway to the world. Thanks to the possibilities offered by the terminal, in January 2010 the Pomeranian region acquired a direct connection with Asia within the Maersk Line service. Beginning from mid August 2013 the service is being handled by 'Triple-E' state-of-the-art vessels, with a capacity up to 18 000 TEU [20-foot containers]. In March 2013, Authorities of the Port of Gdansk and Managing Director of Deepwater Container Terminal have signed a contract for the construction of a second container terminal DCT II, which will increase handling capacity of DCT up to 4 million TEU. The investment cost is estimated at EUR 250 million.

The Port of Gdansk Authority, along with a Belgian transhipment operator Sea-invest, completed in 2014 construction of coal transhipment base for more than EUR 50 million, which will also facilitate transshipments of iron ore and aggregates. Storage yards dedicated mainly to coal and iron ore will accommodate around 2 million tonnes of cargo.

One of the largest investments in Pomeranian ports, and at the same time in Polish petroleum logistics, is the construction of a liquid fuels transhipment base. The estimated value of the investment is approximately PLN 800 million. It is the only such investment in the Baltic Sea region.



Port of Gdansk - bird's-eye view

Photo: Port of Gdansk Authority S.A.

On the other hand, Port of Gdynia maintains its competitive advantage by investing in an increase of handling capacity and a development of port communication infrastructure. The most ambitious Project was aiming at dredging of the Port Channel to -13.5m, which allowed to serve larger vessels. The total cost of the project equals to PLN 95 m.

Simultaneously, the port invests in infrastructure for servicing ro-ro vessels. Therefore, development works embrace the terminal itself and the adjacent rail and road infrastructure. Under the project, the terminal will have gained more efficient transport system, new maneuver and parking squares and additional ro-ro platforms by the end of 2013. The cost of all construction works sums up to PLN 127 m.

The intense development of the seaports of Gdansk and Gdynia is one of key development factors of the logistics industry in the region.

For more information about the logistic potential of the region see page 14

AIR CONNECTIONS

The Lech Walesa International Airport operates in the region. It serves connections with all the most important airports in Europe.



Lech Walesa Airport



Source: Gdansk Lech Walesa Airport, February 2015

When compared to other airports in Poland, an unquestionable advantage is that it has the greatest number of air connections with Scandinavian countries.

	Gdansk	Wroclaw	Cracow	Katowice	Poznan
Bergen	✓		✓		
Copenhagen	✓	✓	✓		✓
Gothenburg	✓				
Helsinki	✓				
Malmö Sturup	✓				
Oslo	✓				
Oslo - Rygge	✓	✓	✓		
Oslo - Torp	✓			✓	
Stavanger	✓				
Stockholm-Skavsta	✓		✓		
Turku	✓				

* February 2015
Source: Local Airports

Since 2000, the passenger and cargo traffic at the airport in Gdansk has been growing dynamically. Thanks to the completion of the planned investments, the number of passengers may increase by 2020 to 7.5 million annually.

PASSENGERS AND CARGO SHIPMENTS AT THE AIRPORT IN GDANSK IN 2007-2014



Source: Lech Walesa Gdansk Airport

RAILWAY TRANSPORT

Rail connections in the Pomeranian region constitute a very convenient method of cargo transportation for merchandise arriving at ports in Gdansk and Gdynia by sea and then transported inland. Aside from local connections, important international railway routes also run through the region.

from Gdansk via Bydgoszcz, Lodz, Katowice and further to Bratislava, Prague and Vienna

from Gdansk via Warsaw, Cracow and further to Prague or Bratislava

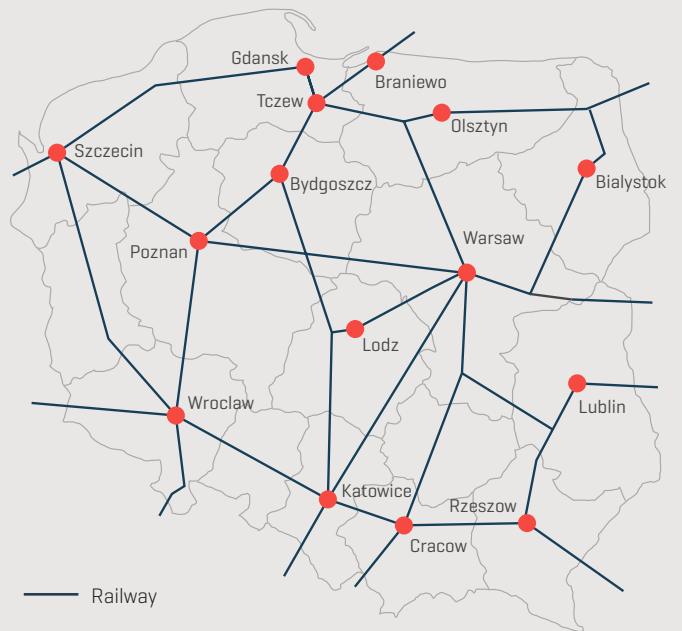
from Gdansk via Tczew, Braniewo to Kaliningrad

from Gdansk via Poznan to Berlin

From December 2014 onwards, connection between Gdynia and Warsaw and further to Cracow are provided by state-of-the-art Pendolino trains which will attain up to 200km/h on this route.

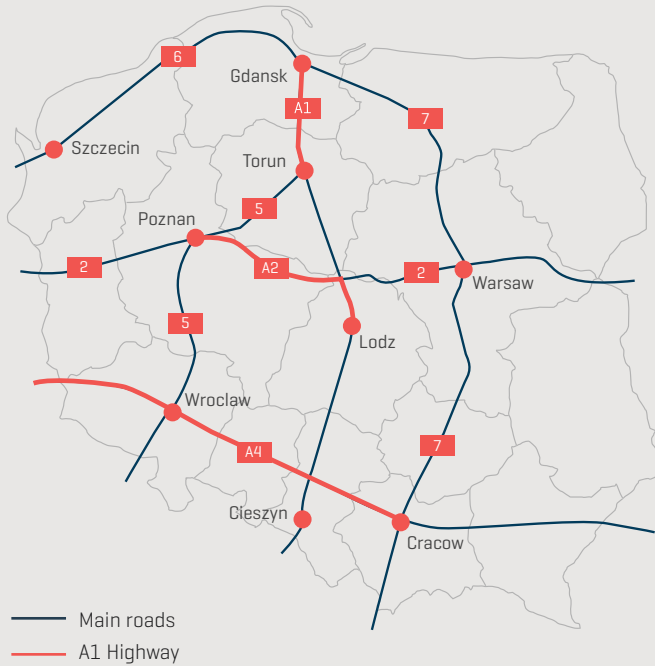
In the near future, investments will be completed which shall additionally facilitate transportation within the region: Pomeranian Metropolitan Railways [September 2015], Hel Corridor, and the Koscierski corridor.

RAILWAY CONNECTIONS IN POLAND

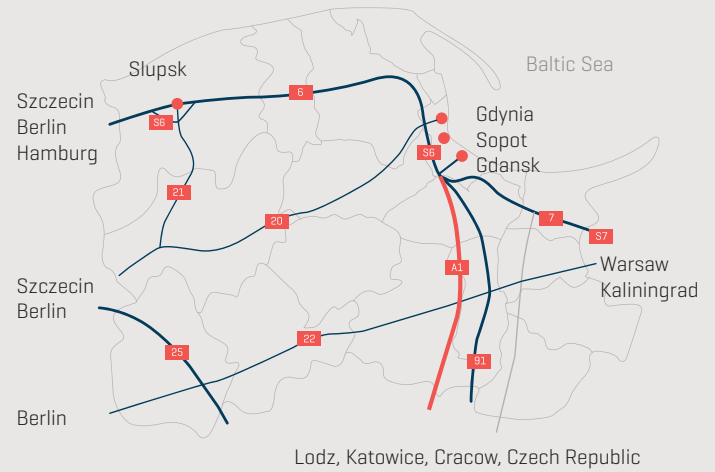


ROADS

ROAD CONNECTIONS IN POLAND



POMERANIAN REGION ROAD CONNECTIONS



The road with the greatest strategic importance is the A1 Motorway. It will form a part of the international route connecting Scandinavia with the south of the continent. The roads of national routes no. 7 [Gdansk – Warsaw – Cracow] and no. 6 [Gdynia – Szczecin] are quite significant. In the near future, these routes will be extended and upgraded to expressways.

YOUNG, WELL-EDUCATED AND EXPERIENCED STAFF

The Pomeranian region stands out against the rest of the country due to a high percentage of the population of working and pre-working age. In accordance with forecasts of the Gdansk Institute for Market Economics (IBnGR), the number of people of working age will decrease more slowly in this region when compared to the average for the whole Poland. In 2010, 2011 and 2013, Pomerania took the 1 st place in terms of growth rate in Poland [Central Statistical Office].

An advantage of Pomeranian region over the other Polish regions is the fact that investors in this region still have free access both to very well educated graduates as well as specialised, experienced staff. What is more, they may count on support in the recruitment process provided by global companies which have offices in Tri-City, including: Manpower, Randstad, Adecco, Hays and Startpeople.

Number of working-age population [2013]*	1 530 083
Number of people professionally active [Q3 2014]*	901 000
Unemployed [Q4 2014]*	96 752
Unemployment rate in Pomeranian Region Region [December 2014]*	11,3%

* CSO 2014

GEOBAN S.A.



Radosław Krasowski
RADOSŁAW KRASOWSKI
 HR Manager Geoban S.A.

Geoban Co. has been present on Pomeranian market since 2008. Initially, we employed only 40 people, but just after two months we had 150 employees working in 11 teams of banking services. Currently Geoban S.A. is located in the well-connected and modern office buildings of Luzycka Office Park in Gdynia and employs 500 people.

What determined the location of the branch in Pomerania was primarily the availability of young, educated, fluent in foreign languages people who are familiar with computer applications. Another attractive thing from the employer's perspective is the possibility of cooperation with the Poviats Labour Office in Gdynia in the internship program for graduates of high schools and universities. All of that makes Pomerania a very good location for our business.



INTEL



TOMASZ KLEKOWSKI
 Central Eastern Europe
 Territory Manager
 Intel Corp.,
 Member of the Board
 Intel Technology Poland

Intel Lab in Gdansk is one of Intel's biggest research and development centers in Europe and one of the most recognized. At the same time it becomes an important Tele-Information service center for other European Intel subsidiaries. Being located in Gdansk has a lot of advantages. The Technical University of Gdansk, with which we cooperate very closely, offers very high level of education on IT faculties and is our most important and largest source of human resources.

Even 3rd or 4th year students are offered internships or partial employment. **The level of education and qualifications of Polish IT engineers are incredibly high which is proven by the fact that our research and development center works on Intel's key projects concerning high technologies which will appear on the market in a few years time.**

Currently over 700 people work in our Lab and we plan further increase in the employment.



28 higher education institutions operate in the Pomeranian region, educating almost 102 000 students. In 2013, 28 064 students graduated from Pomeranian universities. [CSO, 2014]

The most important university centres in the region, providing education for students for main economic sectors:

UNIVERSITY	NUMBER OF STUDENTS *
University of Gdansk	28 684
Gdansk University of Technology	25 217
Gdynia Maritime University	6 342
Pomeranian University in Slupsk	3 958
Medical University of Gdansk	5 389
Naval University of Gdynia	3 445

* CSO, 2014

MAIN SUBJECTS STUDIED IN ACADEMIC YEAR 2012/2013

Subject	Students	Graduates
architecture and construction	4984	1170
biological sciences	1468	414
economics and administration	22094	6933
engineering and technology	12546	2561
environment protection	1505	384
IT	4475	898
journalism and information	517	165
law	3208	450
manufacturing and processing	1725	325
maths and statistics	1312	457
medicine	7526	2010
pedagogy	9174	4483
physics	2680	655
population services	4162	1350
protect and security	4280	693
social sciences	9349	2624
social welfare	245	65
transport services	2828	376

CEO 2014

Source: Local Data Bank of Central Statistical Office

LUFTHANSA SYSTEMS POLAND SP Z O.O.



ADAM WOJEWÓDKA
President of the Board of Lufthansa Systems Poland Ltd.

Lufthansa Systems Poland started in Gdansk in 1998. Currently our company employs over 300 professionals from various fields (IT, aviation, navigation).

The main reason for the location of investment in Poland was access to highly skilled workforce and an attractive cost of doing business. A great number of colleges, the airport with international connections, rich hotel base (dynamically expanding especially in recent years) and a very rapid development of the city make Pomerania an excellent location for our company. In addition, the city of Gdansk has always encouraged new investment and the business community, which is widely represented in almost all sectors of the economy.



DYNAMICALLY DEVELOPING ECONOMY

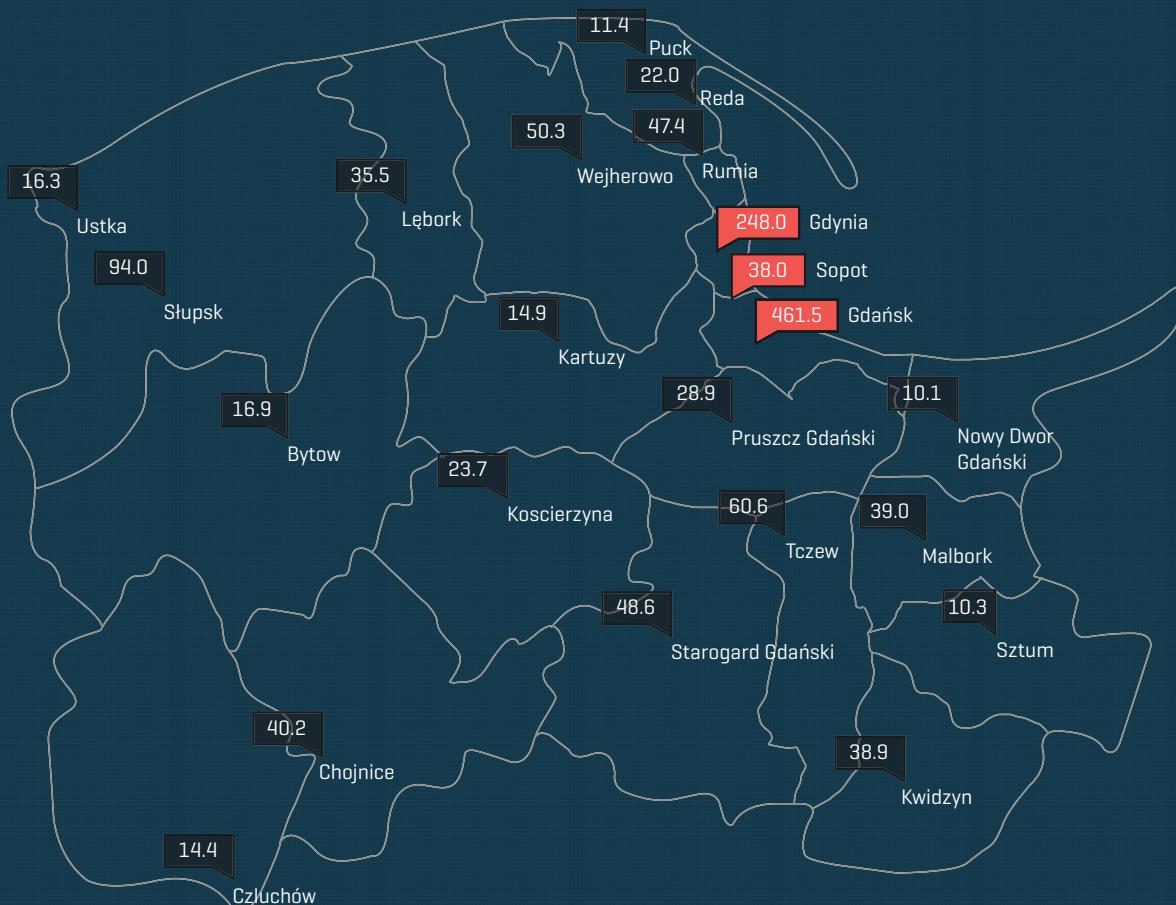
THE MOST IMPORTANT BUSINESS CENTRES

Strong municipal centres constitute the basis of the region's economic growth. Their economic potential stems from the concentration of human capital – as much as 66% of the region's population are city residents

The highest level of concentration of business activity occurs within the Tri-City Metropolis (Gdansk, Gdynia, Sopot along with adjacent districts). It is inhabited by 1.25 million people.

The largest cities and district capitals (inhabitants in thousands)

Source: CSO 2015



Aside from the Tri-City Metropolis, there are also many districts and cities in the region that are attractive in terms of investments. Słupsk, Tczew or Kwidzyn may serve as examples here. Such companies as Scania, E.ON Sverige, Gino Rossi, Curver, Flextronics International, Eaton Trucks, Gemalto, Tapflo, or International Paper Kwidzyn – the largest American investment in Poland, have offices there.

Cities that stand out on the map of investment attractiveness of the region due to the vicinity of Tri-City and transport availability are Malbork, Starogard Gdanski and Wejherowo.

INDUSTRIES WITH THE LARGEST INVESTMENT POTENTIAL

In 2010, "Analysis of Pomerania Investment Attractiveness" was conducted. The study prepared by PwC and IBnGR indicated six industries of the largest potential in attracting foreign direct investments.

PwC



JACEK SOCHA
Vice President of PwC Polska



The analysis showed that the following industries have the largest growth potential in the Pomeranian region: **logistics, BPO/SSC [Business Process Offshoring / Shared Service Centre], ICT [Information and Communication Technologies], power engineering, light chemical industry and automotive industry.**

The maritime situation of the region as well as the direct access to the trans-European TEN-T network create conditions for the development of transportation and logistics – not only of domestic, but also global range. The region also has human resources which provide economies of scale, especially important in the case of an activity of a highly innovative character. A significant supply of specialists in the field of finance and IT combined with very good command of foreign languages open up development perspectives in the region in the scope of SSC/BPO and ICT.

In the case of power engineering, the analysis revealed a relatively low production potential which creates demand for investments both in industrial networks as well as conventional, nuclear or renewable power engineering, with very good environmental conditions in the region for the latter. The Pomeranian region has very good personnel and infrastructural back-up for the development of investments in the field of light chemical industry. The analysis of global trends showed that the automotive industry in the region has a significant growth potential, particularly in the scope of components manufacturing.





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 on the crossing of the 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]. For more information see page 6

The ports of Gdansk and Gdynia handle all types of cargo. It is worth mentioning, that in total, Pomeranian ports emerge as regional leaders in containers handling. In 2010, Pomerania was ranked second (after St. Petersburg) among the ports of Baltic Sea.

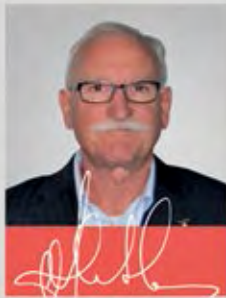
Sea transport from Pomeranian ports includes all world directions. The connections which are regularly operated include connections with Asia (including China, Taiwan, Singapore, Lebanon), North America (the USA, Mexico), South America (including Guyana, Venezuela, Colombia) and Central America (including Guatemala, Honduras, Costa Rica), and also European ports (including Rotterdam, Hamburg and St. Petersburg).

Thanks to the DCT and weekly connections with Asia introduced by Maersk Line (AE10 line), operated by the largest transport vessels in the world, Gdansk has become the key seaport on the Baltic Sea. Merchandise lands directly in Poland from where it is distributed by land transport or smaller vessels to other countries. Thus, the Pomeranian region has become a posting hub of Central and Eastern Europe for merchandise shipped by sea from Asia.

They have already trusted us:

DCT Gdansk ■ Goodman ■ ProLogis ■ PANATTONI ■ GCT ■ BCT ■ Europort Grain Terminal ■ EuroPort Inc. Poland ■ C. Hartwig Gdynia
 KGI Glomb Logistics ■ DAMCO ■ Maersk Line ■ ROHLIG SUJS Logistics ■ Europol ■ Grain ■ Segro ■ Schenker DB ■ Gefco Wincanton
 Raben ■ Poczta Polska ■ Cargoforte ■ Dachser ■ Kuehne&Nagel ■ Panalpina ■ Terramar ■ Balticon ■ LPP S.A. ■ ATC Cargo ■ Jeronimo Martins
 Netto ■ Aalborg Portland Polska

DCT GDANSK



MACIEK KWIATKOWSKI
Managing Director DCT Gdansk S.A.

Deepwater Container Terminal Gdansk was built in 2007. Since that time, DCT has been steadily growing to strengthen its position and reach the employment of over 500 people. Because of its favorable conditions for running the best container terminal in the Baltic Sea, DCT was located in Gdansk. Apart from the natural deep approach channel, Gdansk as well as whole Tri-City are well communicated with the rest of Poland and Central-Eastern Europe. Thanks to it, DCT has a potential to become a hub for regional transportation. The quality of infrastructure in Pomerania and other regions of Poland is being gradually improved. In addition, new infrastructural projects completed in the region has been also strengthening DCT as a regional gateway. Poland, as an EU member, assures business stability and application of effective tools. For us, a company cooperating with foreign partners, Gdansk constitutes an ideal location also because of large talent pool with high language skills. Most of all, we employ young and ambitious people with a potential. For that reason, we cooperate with Tri-City universities, to help develop regional human resources.



There are four container terminals operating in Tri-City in total. DCT Gdansk ranks first with the estimated annual throughput capacity of over 1 000 000 TEU. However, due to planned investment, terminal's total capacity will increase up to 4 000 000 TEU by 2016. Aside from DCT Gdansk, there is also Gdansk Container Terminal (GTK). Additionally, there are two big, state-of-the-art container terminals operating at the port of Gdynia: Baltic Container Terminal (BCT) and Gdynia Container Terminal (GCT). Since 2003, the operator of BCT has been ICTSI international corporation with its registered office in the Philippines. Starting from 2005, a number of investments at the Port of Gdynia have been implemented by Hutchison Port Holdings (HPH), which have resulted in the conversion of the shipyard company into an advanced container terminal.

In addition to transport infrastructure, the Pomeranian region also offers a well-developed logistics base. On port grounds, near the state-of-the-art container terminal DCT Gdansk and Sucharskiego Route, an area of 110 hectares was leased by Goodman Poland. The investor performs infrastructural and warehouse investment within the Pomeranian Logistic Centre. 500 000 m² of warehousing, production and office space will come into being. Estimated value of the project sums up to EUR 300 m. The 1st stage of the project [14 000 sqm] is already operational. The tenants include Terramar, Kuehne & Nagel, NRF. The 2nd stage of the project [14 000 sqm] is due in 2016.

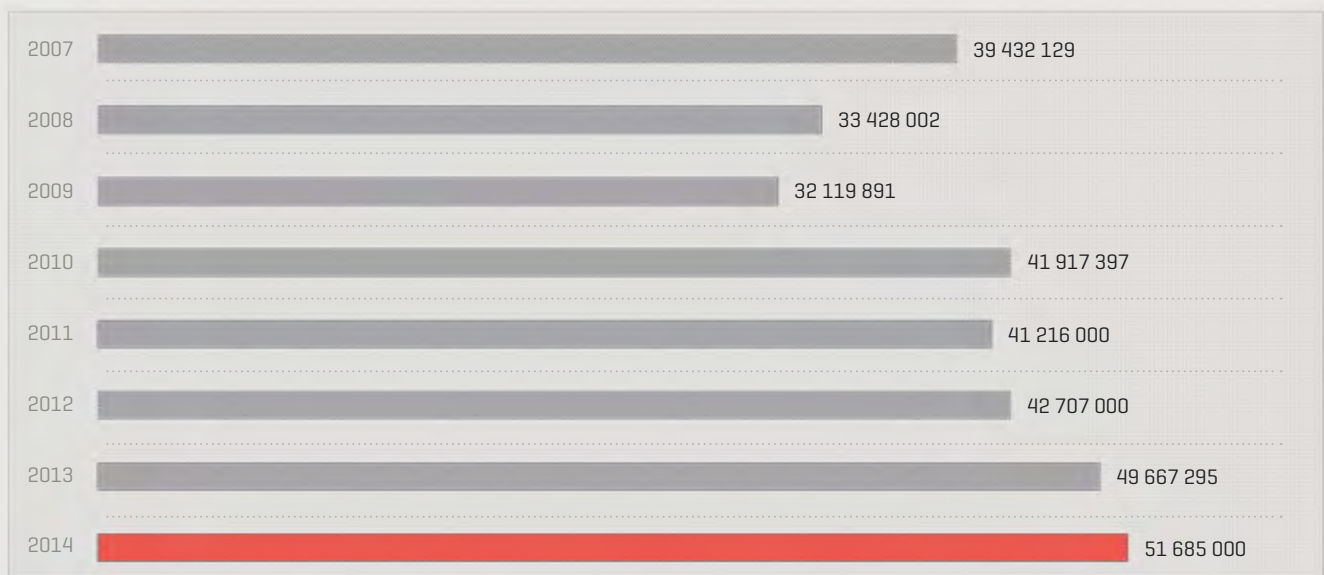
Along with Goodman, the DCT implements the concept of Port Centric Logistics, on the basis of the London standard. It is the first centre in Europe to integrate port and logistics functions on a scale grander than in London. Such a solution makes it possible to lower transport costs and save time.

Port Centric Logistics (PCL) – is a conception based on the assumption that distribution centres of companies exporting and importing commodities should be placed as close to container terminals [which ensure the cheapest mean of transportation] as possible.

The PCL concept is based on the British model and it constitutes the first investment of this type to be implemented in continental Europe. Its main premise is to lower road transport costs by way of placing distribution centres in the closest vicinity of the container terminal. Thanks to this, goods in containers do not have to travel the distance from the port to warehouses in order to be unloaded and transported to the distribution points, as they are unpacked from containers just after being unloaded from the vessel. This solution ensures faster and friendlier transportation and also significantly reduces the costs of delivering goods to recipients.

Also in the western part of the Port of Gdynia a Logistics Centre will be created in the vicinity of the two existing large container terminals. It is planned that various business entities will operate within the centre, especially logistics operators, enterprises providing storage services and forwarding companies, as well as other providers of logistic services, which will have the possibility of adjusting the rented, improved land to their needs.

CARGO TRANSHIPMENTS IN THE POMERANIAN REGION SEA PORTS IN 2007-2014 [IN TONNES]



Source: Ports in Gdansk and Gdynia

Road and railroad infrastructure has been subject to intense extension works within recent years. A number of intense activities have been undertaken at the domestic and regional level, aimed at the creation of the Baltic – Adriatic integrated transport corridor. The geographic situation of Poland between the two bodies of sea water: the Baltic and Adriatic, creates extraordinary conditions for directing the stream of cargo handled at the ports of both seas through our territory.

In academic year 2012/2013, nearly 5 000 students studied subjects related to the TSL industry. The University of Gdansk, Gdansk University of Technology and Gdynia Maritime University offer extended curricula related to foreign trade, logistics, forwarding and port operations. Private universities also have rich educational offers. This is also true at the secondary level of education, where specialists are educated for the TSL sector.

Transport infrastructure covered with TEN-T system in the Pomeranian Region

A1 motorway

E65 railway line

Port Gdansk

Port Gdynia

Airport of Gdansk

Infrastructural projects implemented within the TEN-T system

in the Pomeranian Region

Rail Baltica – railway connection between Pomerania and Baltic countries.

Via Hanseatica – road connection along the route Hamburg-Riga, running through Pomerania.

Many companies in the Pomeranian region are investing intensely in warehouse back-up. In the near future, development of more than 1 million m² of land for the purposes of warehouse infrastructure is planned.



BPO & SSC SECTOR

Tri-City is the main hub of development of services centres in the Pomeranian region. More than 47 [both Polish and foreign origin] business service centers operate here and employ approx. 16 000 employees. The vast majority of these centers specialize in IT services (ITO centers) and financial processes. What distinguishes Tri-City on the map of the Polish BPO&SSC sector is a distinctively stronger position in employment at research and development centres. There are presently approx. 1 800 person employed at Tri-City R&D centres.

Human capital of Tri-City has been widely recognized by investors, who transfer advanced process of business support to Pomerania. Qualification and skills of Pomerania employees allowed to establish first centers of knowledge – based services (KPO – Knowledge Process Outsourcing- Coleman, KYC – Know Your Customer – PwC) and centers of excellence (i.e. Thomson Reuters)

A distinctive feature of the region is a large number of student fluent in foreign language less popular in Poland, for example Nordic ones.

In the beginning of 2013 Tri-City was awarded prestigious 'Best City of the Year' title in the BPO/SSC Sector during Polish Outsourcing & Shared Services Awards Gala. Tri-City competed over the title with other nominees: Cracow, Wroclaw and Poznan.

The winners were selected by international jury consisting of experts from BPO/SSC field representing service centers (State Street, UBS, Alexander Mann, Credit Suisse, TATA), consulting agencies (Jones Lang LaSalle, Boston Consulting Group) and the most influential trade associations in Poland and in Europe – ABSL, ASPIRE and European Outsourcing Association.

Moreover, in January 2013, Tri-City was recognized during Outsourcing Stars Gala as city no. 1 in Poland with the highest growth rate in number of graduates in fields of economics (including finance & accounting) and IT.

59% of people who speak Scandinavian languages in Poland reside in the Pomeranian region (ABSL Report)

In 2014 more than 6 service centers were established in Tri-City (ThyssenKrupp, Proservartner, MOL Europe, CCC, CCIG and PwC. New investments will create even 1 500 jobs in upcoming years.

They have already trusted us:

Sony Pictures ■ Bayer ■ Thomson Reuters ■ Bank BPH/GE Capital ■ First Data ■ Geoban ■ Acxiom ■ Arla Foods ■ Transcom ■ PZU ■ BEST Masterlease ■ Contact Center ■ Hempel ■ PPG ■ Energa ■ OIE Support ■ Polpharma ■ Willis ■ WNS ■ ThyssenKrupp ■ Proservartner ■ MOL Europe ■ PwC ■ Call Center 24 ■ TIM Call Center ■ Kemira ■ Metsà Group ■ Competence Call Center ■ Inter Galactica ■ Centrum Obslugi Biznesu



MICHAEL DESMURS
Managing Director
Sii Gdansk

Sii is currently the fastest developing company in the Polish IT outsourcing and industrial engineering market. The branch in Gdansk was set up in January, 2008. Now it is the biggest and most dynamically growing Sii branch in Poland – it employs 330 people.

In Tri-City we have developed Testing Centre and BPO Offshoring Centre designed for international clients. We carry our projects for the biggest companies from such sectors as Hi-Tech, banking and energy. The list of our clients include Intel, Gemalto, UTC Fire & Security or Nordea. Investors choose our experience, high quality of service and punctuality. The dynamic growth and fruitful cooperation is additionally favored by Tri-City assets. It is enough to mention highly educated employees from engineering sector, investment-friendly environment, positive approach of local authorities, favorable geographic location and world-wide network of connections. It is all appreciated by both Sii [as a supplier] and our clients.



The majority of entities which have hitherto invested in service centres in Tri-City are first of all American companies (more than 1/3 of all centres). Also Scandinavian, French or Irish companies are significant investors.

The Scandinavian investors are increasingly interested in Tri-City mostly because of the air connection network with Scandinavia, which is the most extensive in Poland.

Regional universities offer many unique specialisations when compared to the rest of Poland. Among them is the largest centre of Scandinavian studies at the University of Gdansk. The centre offers Swedish, Danish, Norwegian, Icelandic and Finnish programs. Also the offer of language studies at the University of Gdansk was extended by Chinese.

The cooperation of Pomerania universities with investors present in the region is conducive to the dynamic development of the SSC&BPO sector in Tri-City. Schools are involved in the organisation of specialised training schemes for individual companies. An example is the finance and banking programme of Thomson Reuters and the University of Gdansk or the University Competition Centre created by IBM and Gdansk University of Technology.

When analysing the structure of services provided at Tri-City centres, one may see a distinct specialisation towards IT services as well as research and development activity (including software development). Also centres that provide financial services are gaining an increasingly stronger position.

Also in terms of office infrastructure, Tri-City is very well prepared for cooperation with investors from the SSC & BPO sectors. As the third regional market (with more than 500 000 m² of state-of-the-art offices and vacancy rate equal to 11.5%) it creates a possibility for new leases to appear on the market or for existing ones to develop in fully equipped office (in a period of 2-3 months).

Available office area:	516 100 m ²
Vacancy rate:	11.5%
Office area under construction:	93 800 m ²
Rent rates:	12.5-13.5 EUR/m ²

Source: "Tri-City Office Market Overview, Q4 2014" report by Jones Lang La Salle

FOREIGN LANGUAGES AVAILABILITY

English	✓	Danish	✓	Romanian	✓
German	✓	Italian	✓	Serbian	✓
Spanish	✓	Portuguese	✓	Croatian	✓
French	✓	Slovak	✓	Bosnian	✓
Russian	✓	Czech	✓	Arabic	✓
Norwegian	✓	Ukrainian	✓	Urdu	✓
Swedish	✓	Japanese	✓	Hindi	✓
Finnish	✓	Chinese	✓		

ICT

The Pomeranian region is presently the most dynamically developing region in the ICT sector. Almost 5 000 companies from this sector operate here today, employing over 25 000 people. Over 10% share of export income was noted in 53 ICT companies that employ 12.5 thousand people, which constitutes 2/3 of the sector employment. The export value percentage of the ICT industry in the Pomeranian region significantly exceeds the country's average, which makes the region one of the sector's leaders in Poland. In combination with specialised employees, a well-developed scientific base, the availability of state-of-the-art office and production area, the most dynamically developing airport in Poland and access to the two largest ports in the country, it creates comfortable conditions for the development of activity both in research and development and IT services, as well as electronics production.

They have already trusted us

- Adva Optical Networking ■ Assel ■ Compuware ■ Fineos ■ IBM
- Intel Technology Poland ■ Jabil Circuit ■ Jeppensen a Boeing Company
- Kainos ■ Lufthansa Systems ■ Multimedia Polska ■ Ncomputing ■ Nevion
- Playsoft ■ Relacom ■ Sofrel ■ Synopsys ■ GetResponse ■ Asseco
- UTC Fire & Security ■ Speednet ■ Goyello ■ Sii ■ OKE Poland ■ Acxiom
- Neava Poland ■ Misys ■ Powel AS ■ Epam ■ Schibsted ■ Intitek
- PGS Software ■ SMT Software ■ Move

EXPORT OF ICT SECTOR IN THE POMERANIAN REGION



Pomeranian universities educate outstanding specialists from ICT and electronics. The main source of staff in the region is the Gdansk University of Technology, at which nearly 7 000 students of IT and electronics are educated yearly. The second largest staff supplier for the sector is the University of Gdansk. Also the Polish-Japanese Institute of Information Technology in Gdansk educates excellently qualified IT specialists whose skills are perfectly suited to the market needs. The whole system of higher education in the Pomeranian region educates almost 10 000 students yearly, and delivers to the market nearly 1 100 graduates of majors related with IT and electronics. What is more, the CISCO Regional Academy, which has been already operating for 10 years within the CISCO Networking Academy programme, offers training in the design, development and maintenance of computer networks.



IBM



MARCIN MATA CZ
Business Unit Manager,
IBM Poland

Pomerania has a rich pool of engineering talent, linguistic skills (mainly in European languages) and provides a very conducive environment for business development. This makes a compelling case for locating our new center in Gdansk. As a company we embarked a number of years ago upon a global strategy that is focused upon bringing the right resources, at the right time, to aid our partners in the development of innovative solutions – something we call Global Delivery. **This location offers us the ideal combination of a large resource, a well developed and extensive education system, an increasing focus on high-tech industries as well as easy travel connections;** this combined with the geographic situation ensures Gdansk is well positioned to serve Poland itself, Eastern and Western Europe, and link to IBM's other locations.

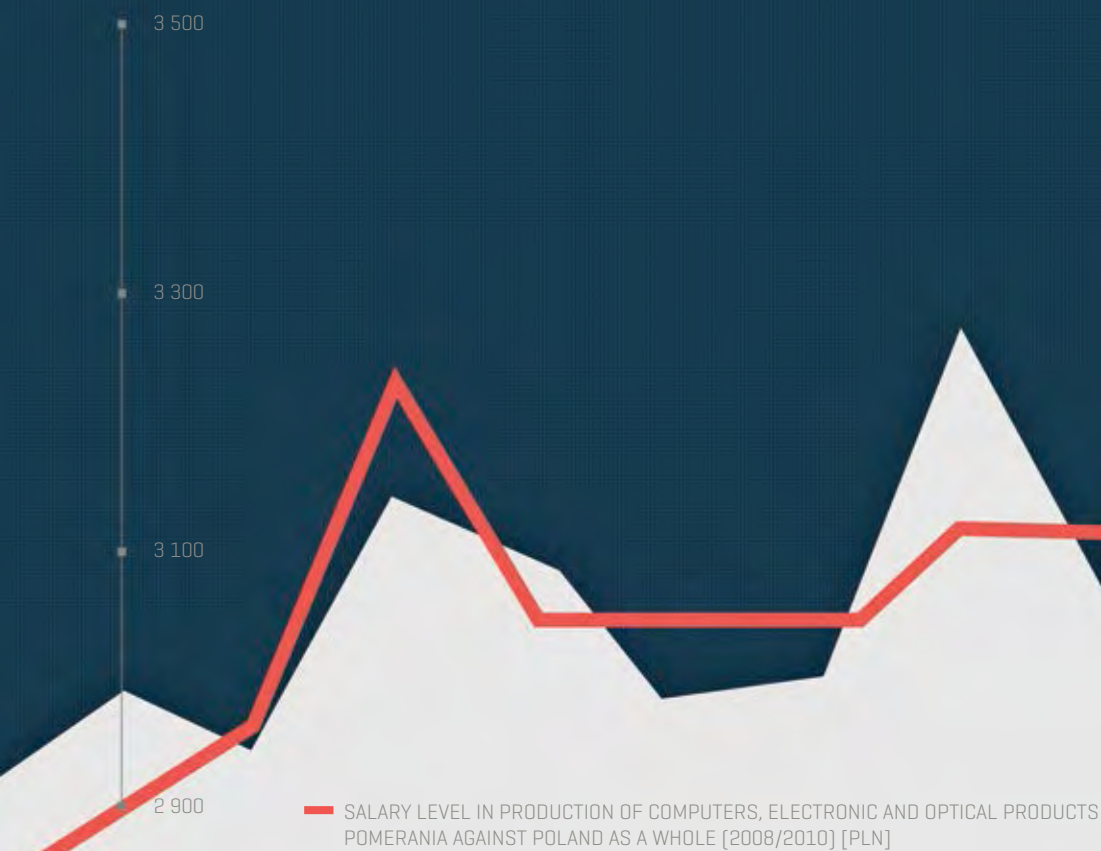


110 technical colleges operate in the region and educate various specialists. Among the occupations taught in Pomerania, the most useful for the ICT and electronics sector are: electronics technician, IT technician, telecommunications technician, ICT technician, technician-analyst, mechatronics technician, digital graphics processes technician, telecommunications technician and electrical technician. In 2013 903 people obtained qualifications in these professions, most of them IT specialists (691 people).

The growing number of graduates and relatively low remunerations of employees guarantee further possibilities of development of the ICT and electronics sector in the region.

AVERAGE REMUNERATION IN IT SECTOR IN INDIVIDUAL CITIES [EUR]

Poland	1 350
Warsaw	1 547
Cracow	1 195
Tri-City	1 172
Prague	2 026
Budapest	1 455
Riga	1 071
Tallinn	1 282
Vilnius	863
Bratislava	1 450



Technologies from the Pomeranian region – outcome of work of our specialists

FUTURE TECHNOLOGIES CREATED IN POMERANIA

There is an Intel R&D centre in Gdansk, which is the second largest one in Europe in terms of size, and it operates successfully. Intel Technology Poland employs more than 1000 employees and it is constantly developing. Intel in Pomerania, based mostly on staff gained from Gdansk University of Technology, works on technologies that will be available on the market in 4 to 5 years.

CHECK YOUR SMARTPHONE – IT IS POSSIBLE THAT YOU HAVE APPLICATIONS FROM GDANSK INSTALLED ON IT

There is presently a Playsoft centre, second in terms of size, in the region. The company relies on employees educated at Pomeranian universities, software developers, artists and testers, who work on advanced applications for all kinds of smartphones, including the iPhone. Also SpeedNet, one of the largest Polish supplier of mobile applications for BlackBerry – which is produced by Canadian Research-In-Motion – successfully conducts its activities in the Pomeranian region.

POMERANIA SPEAKS YOUR LANGUAGE

Also IVONA Software – a developer and producer of the IVONA speech synthesizer – operates in the Pomeranian region. The software is presently the best product of its kind in the world and stays ahead of products of such giants as e.g. Microsoft. In 2013, IVONA Software became a part of Amazon company.

3D IN TRAINING AND BUSINESS

Survey Simulator is a virtual training technology developed by the Polish branch of Det Norske Veritas. It is the first three-dimensional interactive training system [Inspection Simulator], designed and implemented in order to facilitate the training of inspectors. The system does not have any equivalents on the market.

Engineers from Polish DNV branch are also authors of Survey Toolbox. It is a unique piece of software, making it possible to inspect structures with the use of a complete three-dimensional model. Both projects were implemented on the basis of EU funds and they are used by DNV branches worldwide.

POMERANIA WILL ILLUMINATE F1 RACETRACK IN ABU DHABI

Azo Digital Sp. z o.o. is a Polish company that created an electronic flashing unit for lamps used in street lighting. This unique product consumes up to 50% less power and adjusts the intensity of emitted light to ambient conditions. Azo Digital also managed to eliminate the resonance that street lamps fall into, a result that has been pursued unsuccessfully for more than 40 years by the largest power engineering corporations. Azo Digital products are already widely used in Poland and worldwide. They are used among others in the London Borough of Red Bridge, and soon maybe on the F1 racetrack in Abu Dhabi.

Best ICT cluster in Poland

The Pomerania ICT cluster unites more than 150 business and scientific partners in common activities, with the support of regional authorities and the business environment and in cooperation with other global ICT partners. What shows here is the significance of the advanced technologies sector for economic development of the region as well as the commitment of the region in supporting the development of this sector. The intense development of the cluster along with a consistently pursued strategy were noticed by Deloitte in the benchmark study of Polish clusters conducted in 2010.

ICT structure – Internet available from now

The Pomeranian region, and especially Tri-City, offers easy access to broadband Internet. Possibilities, timeframe of execution and cost of obtaining a fibre-optic connection is agreed upon with the operator on individual basis. All A and B class office buildings as well as state-of-the-art warehouse and production areas are equipped with such connections.

ENERGY SECTOR

Today, 70% of power is imported to the region, which makes the Pomerania one of the largest electricity recipients in the country. Despite the large potential, the region has the least generation capacity. Such a situation results in a high demand for generation units, especially low-emission ones, which comply with European Union standards.

Due to the membership of the European Union, Poland is obliged to produce 15% of energy from Renewable Energy Sources (RES) by 2020. Thanks to such a situation, the demand for energy generated by RES investors is ensured. Additionally, the execution of planned investments in transmission and distribution lines in the region will significantly widen the possibilities of connecting for producers of green energy.

LARGEST POTENTIAL FOR INVESTMENTS IN WIND ENERGY IN POLAND

The sea and coastal belt belong to the most favourable, first windiness zone in Poland, with wind attaining an average above 4 m/s. The windiness of our region guarantees the profitability of investments in wind farms, which is, according to TPA Horwath calculations, 12%. Until August 2013, 312,03 MW of wind farms were installed in the Pomeranian region, which gave us third place in Poland in this regard.

They have already trusted us:

EDF - Elektrociepłownie Wybrzeże ■ AES Wind Generation
Greentech Energy Systems ■ Taiga Mistral
GSG Towers ■ Green Power Investment Corporation ■ SSC Baltic Wind
Generpol Sp z o.o. ■ DNV GL ■ National Oilwell Varco
Lane Energy ■ BNK Petroleum ■ Eni Polska ■ Talisman Energy

ELEKTROWNIA POLNOC Sp. z o.o.



SŁAWOMIR ZAWADZKI
Investment Director,
Elektrownia Polnoc Sp. z o.o.

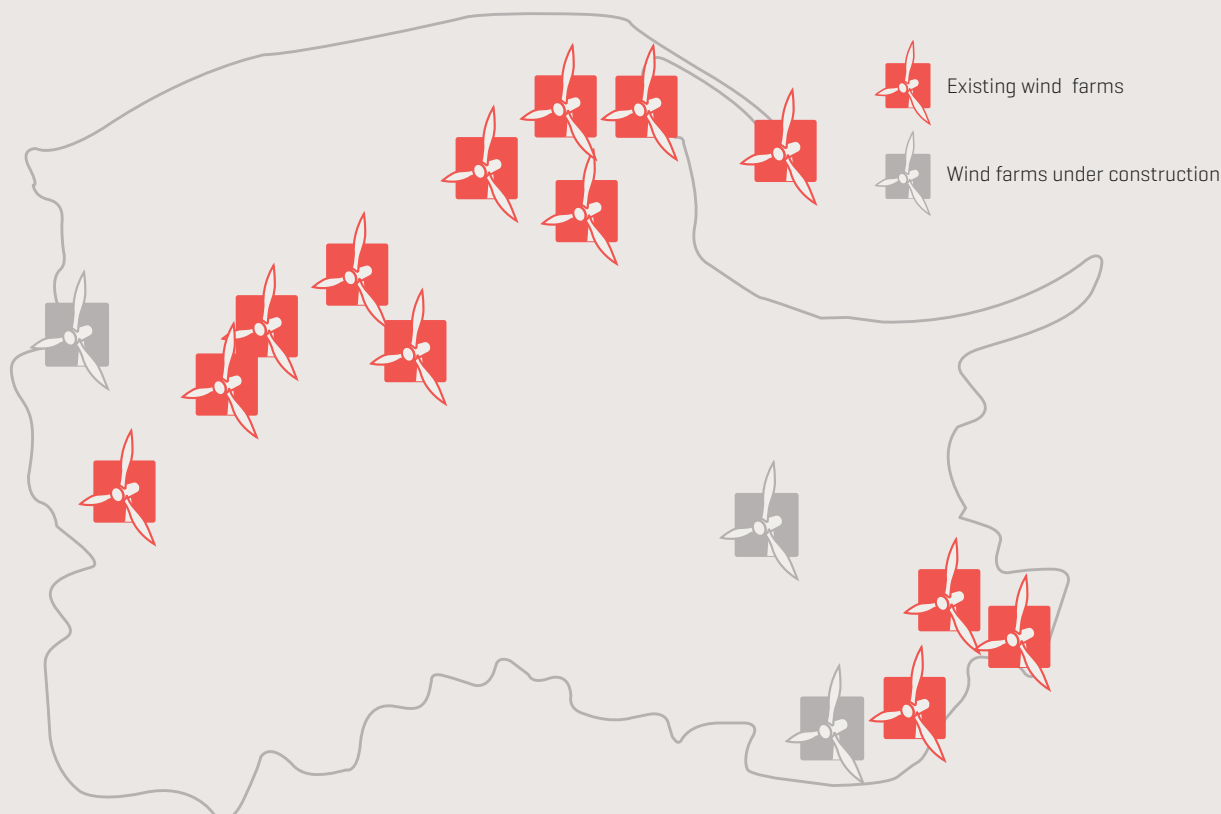
Elektrownia
Północ

When, in 2008, Elektrownia Polnoc Sp. z o.o. started to search for a location for a system power plant in the north of Poland, it followed first of all the criterion of availability of adequately developed infrastructure. **Proximity to seaports, the A1 motorway, Silesia-Ports railway line, existing development plans for a high voltage power grid in the region determined Rajkowy as the place of choice for the construction of the new generation unit with a capacity of approx. 2000 MW.**

During the process of selecting the location, at all levels of local government administration, starting from the Peplin District Office, through to the District Governor's Office in Tczew and ending with the Marshal's Office in Gdansk, we met with competence and high efficiency of the officials.

The location of Elektrownia Polnoc corresponds to the developmental needs of Pomerania and fits into local spatial development plans which provide for construction of a power plant in the Lower Vistula region. The project fulfils the conditions of the programme for ensuring energy safety of the province.

SITUATION OF WIND FARMS IN POMERANIA





OFFSHORE WIND DEVELOPMENT

Also the offshore wind power industry has extraordinary economic potential in the region. The capacity of 2.2 GW has been consented by 2025. It is estimated that 6 GW can be installed by 2030 [FNEZ].

BEST LOCATION FOR A NUCLEAR POWER PLANT

In a ranking conducted by the government, the Pomeranian region [Zarnowiec] was indicated as the best location for a new nuclear plant. The final decision about the location will be taken by 2013. The execution of the first part of the investment is planned for 2020. The Gdansk University of Technology already educates students in fields dedicated to nuclear power engineering.

BIOMASS AND BIOGAS – A POTENTIAL TO BE USED

The location of biogas is determined by the availability of raw materials. Pomerania has enormous potential in biomass production due to the fact that arable land constitutes 42.6% of the area, and 37% is forested. An example of a company that efficiently uses the potential is Poldanor S.A. from Pomerania, the unquestionable leader in agricultural biogas in Poland.

NEW OPPORTUNITIES – MANUFACTURING COMPONENTS FOR WIND AND GAS & OIL INDUSTRIES

The region has potential for fabrication components for offshore wind and oil & gas industries. The supply of quayside and nearby development land with access to skilled labour makes Pomerania region an ideal manufacturing hub for offshore-related industries. An example of such production is construction of wind towers in Stocznia Gdansk SA. Some of the local shipyards have also started the construction of offshore wind farm installation vessels.

HUMAN RESOURCES IN ENERGY SECTOR

In the academic year 2012/2013, more than 9 500 students were educated at Pomeranian universities with majors related to the energy sector. More than 1 500 of them graduated.

The Gdansk University of Technology cooperates with many companies from the energy sector, such as: Grupa Energa, Grupa Lotos, PGE Energa Jadrowa S.A. and GE Hitachi Nuclear Energy.

In 2013 Gdansk University of Technology in cooperation with General Electric Company Polska opened a unique MSc specialization in Poland: Subsea Technologies for the oil industry.

R&D SUPPORT FOR ENERGY SECTOR

Pomerania has a wide range of R&D centers and laboratories supporting energy sector. It is worth mentioning LINTE² – a state-of-the-art laboratory for Innovation Technologies in Electric Power Engineering and Renewable Energy Sources Integration at Gdansk Technical University and Institute of Fluid Flow Machinery with a number of R&D centers carrying out projects in co-operation with energy sector companies.

The IFM, along with Energa S.A. Group, run the largest research project in Poland related to renewable energy, with a budget of PLN 110m. The project is focused on the development of integrated technologies of liquid fuels and power production as well as heat production from the biomass of agricultural waste. The institute also conducts work on dispersed power systems, e.g. the possibility of equipping household stoves with useful micro-turbines allowing the cogeneration of power. The Maritime Institute in turn produces detailed studies and expert assessments and provides consultation and advice regarding wind farms on the Baltic Sea.

The most important institutions supporting the development of the power sector in the region:

- The Robert Szwedalski PAS Institute of Fluid-Flow Machinery in Gdansk;
- The Innovative Power Technologies and Integration of Renewable Energy Sources Laboratory LINTE² at the Gdansk University of Technology [underway];
- Institute of Electrotechnology, branch in Gdansk;
- Power Institute, branch in Gdansk;
- Maritime Institute in Gdansk;
- Polish Wind Energy Society in Gdansk;
- Baltic Energy Conservation Agency;
- Kwidzyn Scientific and Technical Park with Vistula Cluster of Renewable Energy Initiative;
- Initiatives in the field of power engineering at Gdansk Science and Technology Park:
 - Pomeranian Power Technological Platform,
 - Power Quality Park,
 - Team for Nuclear Power Plant GPNT PPNT;
- Academic Centre of Pure Energy at the Pomeranian Academy in Slupsk;
- Polish Biogas Society in Bytow.

LIGHT CHEMICAL INDUSTRY

The analysis of global flows of direct foreign investments revealed that 15% of all investments in the light chemical industry sector in Central-Eastern Europe flowed in 2003-2012. With 120 investment projects, Poland was overtaken in this regard only by Russia (208 projects).

They have already trusted us:

- Polpharma ■ Synexus ■ EURx ■ A&A Biotechnology ■ Invicta ■ Blirt Prochimia Surfaces ■ Synevo ■ Zlaja ■ Oceanic ■ Dermscan ■ BIKOR

FDI INFLOWS IN CEE (2003-2013) * Source: FDImarkets.com.

	Number of projects	CAPEX [USD million]	Jobs
Russia	147	5.983	19 462
Poland	86	2.529	9 740
Hungary	53	2.578	5 309
Czech Republic	39	929	2 271
CEE in total	579	18.323	57 537

The light chemical industry was selected as a priority sector for the Pomeranian region on the basis of research the subject of which was the geographic distribution of business activity in Poland. The research was based on an evaluation of significance of a given industry for the region's economy in relation to the national economy. Results indicated the Pomeranian region as a leading location for business activity related to the light chemical industry. The good condition of the sector in Pomerania stems from three reasons: a combination of favourable location factors with developed transport infrastructure, availability of qualified staff and necessary research and development infrastructure.

The unique location of the region as well as access to all types of transport made Pomerania an export gate to the countries of Central-Eastern Europe, Russia and CIS. In addition, the region offers a logistics base with a high standard of services, and its potential will be quadrupled within a couple of next years.

As many as three universities in Pomerania offer higher education in biotechnology. These are: the University of Gdansk in cooperation with Gdansk Medical University and Gdansk University of Technology. In total, almost 4 000 people study biotechnology and chemistry, and also those faculties related with the production of pharmaceuticals and cosmetics.

Tri-City universities have implemented an investment programme for educational infrastructure amounting to PLN 236 m. Recently, the opening of new buildings dedicated to the faculties of biology and chemistry took place. Both buildings comprise a part of "Baltic Campus of the University of Gdansk" project. total, in the three buildings with an area of more than 50 000 m² there are approx. 150 laboratories and specialist workshops (including ones for the most innovative specialties: molecular, environmental and experimental biology, molecular environment biotechnology), a technology hall enabling scientific research and didactic courses in chemical and environmental engineering to be conducted, as well as a laboratory excellence centre. The project was featured on the Key Individual Projects List and included to the Infrastructure and Environment Operational Programme 2007-2013.

Science and technology parks in Gdansk and Gdynia also prepared a special offer for researchers and companies conducting research in the light chemical industry. Within the parks, there are laboratories offering research in microbiology, molecular biology, in vitro breeding or chemical analysis. Both companies with offices in the parks as well as external entities use the laboratories. In addition, 100 000 m² of new space is coming into being in both parks, designated for laboratories, offices and technology space.

Aside from parks and universities, the research potential of the region is created by enterprises with their own laboratories and research centres. Their largest association is the Pomeranian Bio-Eco-Chemical Cluster, whose task is to integrate, at the regional and international level, enterprises with scientific teams in order to commercialise research results. The Cluster, based on the scientific and technical resources of the participants, makes it possible for entities to conduct research, supporting them at the same time in searching for new sources of finance.

Through its members, the Cluster cooperates with ScanBalt BioRegion, an international organisation associating enterprises conducting activity for the development of science and industry from the Baltic Sea area. The Cluster's office at Science and Technology Park in Gdansk is also the Liaison Office of the Polish ScanBalt branch.

	Population of scientists	Employment in the sector of economy based on knowledge	Mobility of scientists *	IESCD 1997 - level 6	
				Students (2010)	Graduates (2010)
Bulgaria	1 287	759	31	3 850	596
Croatia	638	416	10	-	838
Czech Republic	2 123	1 477	60	25 921	2 228
Estonia	378	188	16	2 653	175
Hungary	1 769	1 305	42	6 817	1 275
Latvia	483	286	18	2 152	132
Lithuania	770	433	47	2 918	406
Macedonia	283	166	6	270	157
Poland	7 280	4 534	311	35 671	3 317
Romania	2 688	1 790	51	28 963	4 764
Slovakia	1 045	716	23	10 949	2 782

* Mobility of scientists - change of workplace; work-work flows.



Pomerania has growth potential especially in the area of clinical trials. The main advantage of the region is the access to a large, Poland-wide pool of patients, which enables trial participants to be recruited effectively. At the same time, Pomeranian and other Polish companies ensure high quality data and fulfilment of European standards in trials (which is confirmed inter alia by the PwC Report "Clinical Trials in Poland 2010"). As a result, as many as 57% of respondents of the PwC's survey indicated that more than 80% of new medicines marketed within the last 5 years were tested in Poland. It is worth stressing that Pomerania is also attractive in terms of the costs of clinical trials. The PwC survey showed that Pomeranian enterprises offer trials cheaper by 20-40% when compared to their foreign competitors (e.g. the USA or Western Europe).

The sector's leader in terms of size of operations is Polpharma S.A. which is at the same time the largest manufacturer of medicines in Poland and actively operates in Middle Eastern Europe, Caucasus and Central Asia. The company specialises in the production of preparations used in cardiology, gastroenterology and neurology. A significant part of Polpharma's product range is made up of OTC medicines. Through its subsidiaries, Polpharma is present on the market of paediatric medicines, advanced vitamin preparations, dermatological preparations, medicines applied in motor organ disorders, diet supplements and antibiotics.

AUTOMOTIVE INDUSTRY

The automotive industry plays a significant role in the Polish economy. It is the second largest industry in Poland in terms of revenues. What is more, Poland is in 5th position in Europe in terms of conditions for the production of cars (just behind Germany, the United Kingdom, France and Italy).

Pomerania, thanks to its favourable geographical situation and efficient sea transport, is becoming an important exporter of automotive industry products. Sea ports in Gdansk and Gdynia offer well organised connections with leading automotive clusters in Germany, Italy, France, the United Kingdom, Belgium, Finland and Denmark. According to PwC Polska data, more than 171 car manufacturing plants operate within the range of the Pomeranian ports.

Both personnel as well as research resources for the automotive sector are located at Pomeranian universities, from which the Gdansk University of Technology is the unquestionable leader in the education of engineers for the needs of the industry. In 2011, around 5 000 graduates of university technical majors, or technical and vocational schools appeared on the Pomeranian market.

On the other hand, due to the dynamic development of the automotive market in Central-Eastern Europe, the Pomeranian ports are gaining importance as a crucial link in the car supply chain. Thanks to the increasing transshipment capacity of containers at Polish port terminals, an alternative access channel to the whole market in the region, a cheaper and more ecological one than road transit through Germany, is coming into being. It is estimated that the demand for car transshipments at Pomeranian ports will grow along with the market of new member states of the European Union. At present, the market is growing at an average yearly pace of 5% (in 2005-2009), and the number of automotive transportation means reached a value of PLN 40m pcs. Against this background, the Polish market, which constitutes more than 50% of the regional market, where the growth rate totalled 7.1%, looks especially attractive.

They have already trusted us:

Eaton Truck Components ■ Eaton Automotive ■ Delphi ■ Gardner Scania ■ Kapena ■ Federal Mogul ■ NordGlass

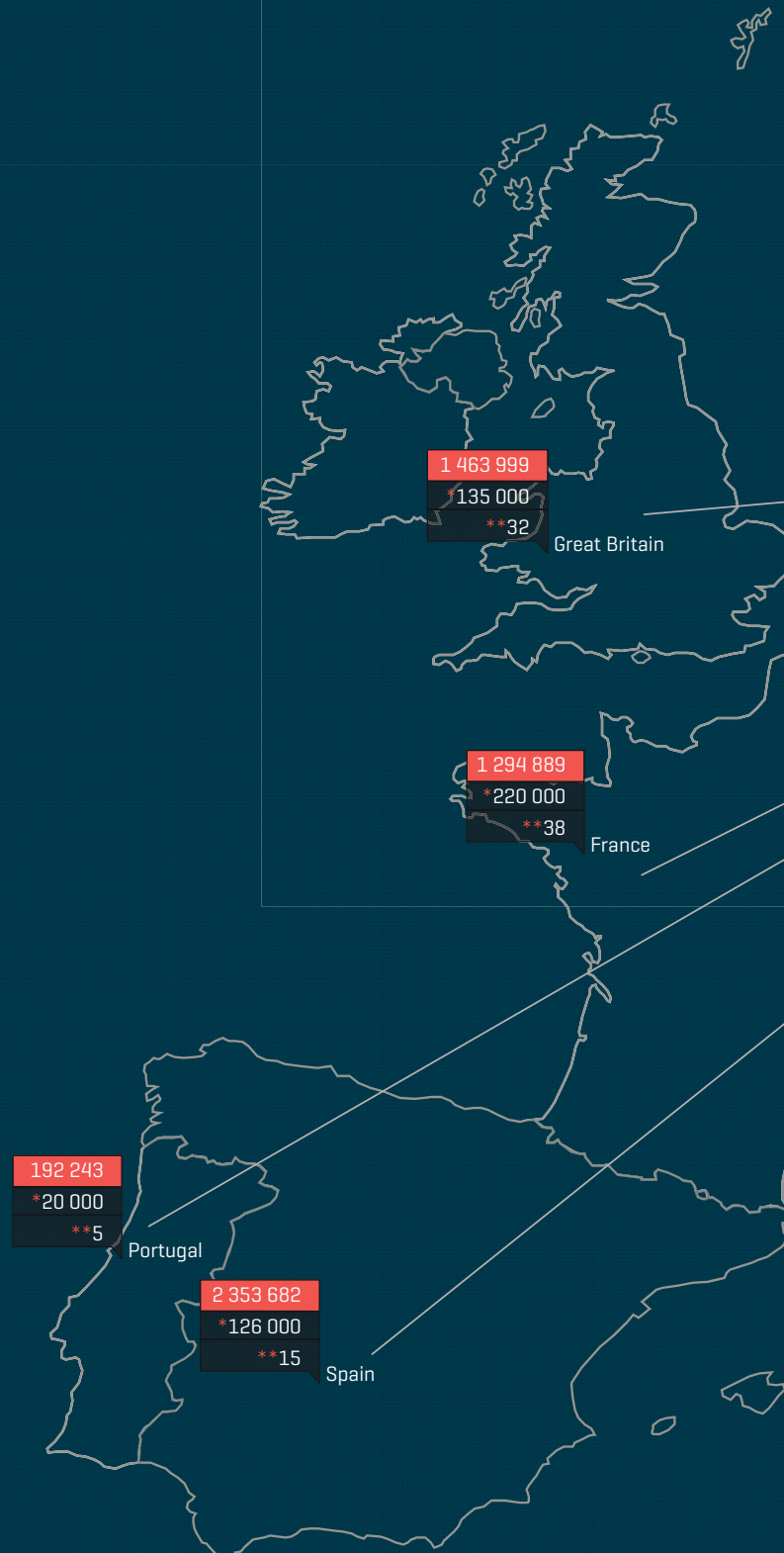
SEA CONNECTIONS WITH AUTOMOTIVE CLUSTERS IN EUROPE

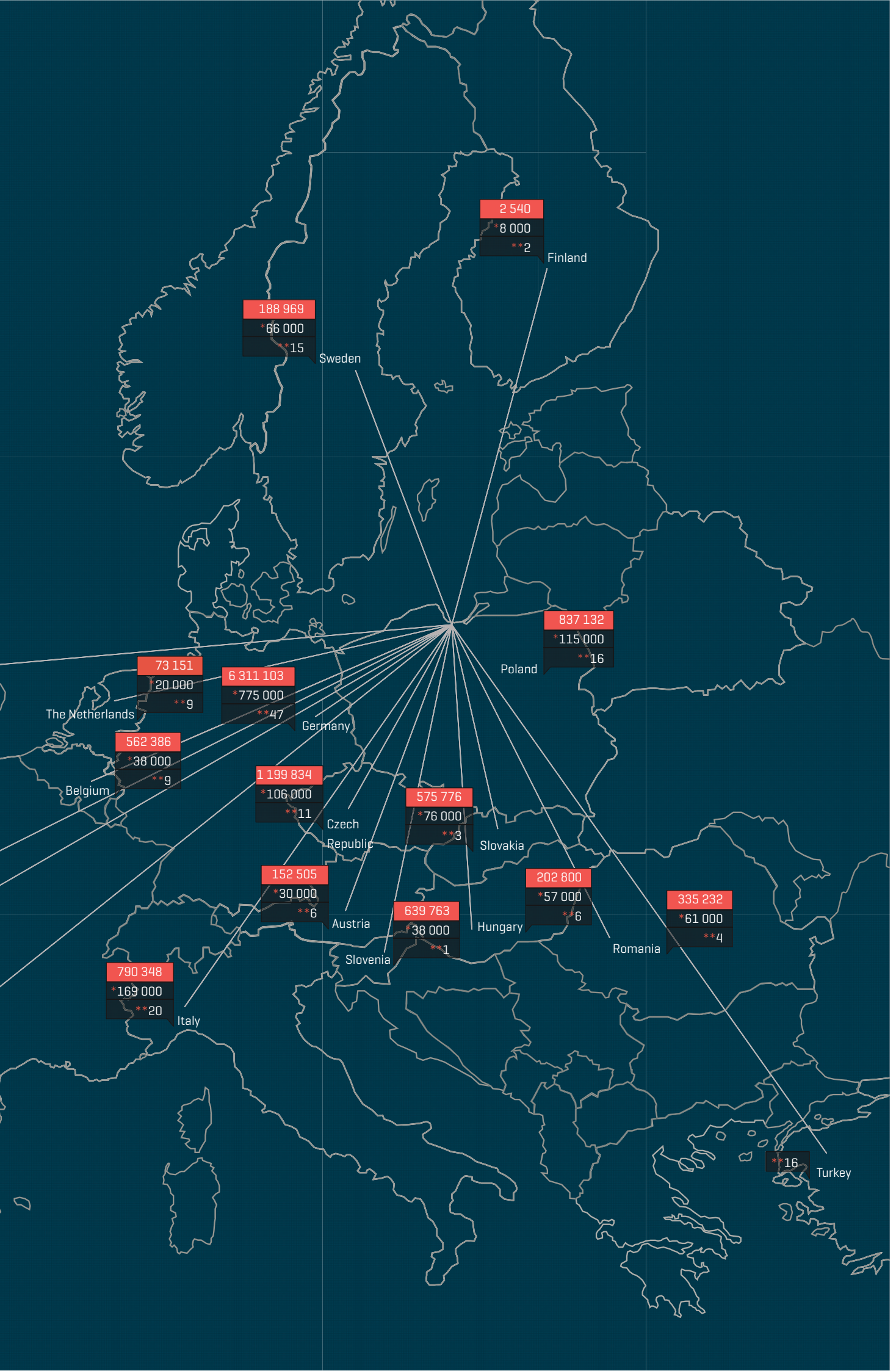
Source: ACEA

Car production (2010)

* Employees (2010)

** Manufacturers (2011)





AUTOMOTIVE MARKET IN CEE COUNTRIES (IN THOUSANDS OF PCS)

	2005	2006	2007	2008	2009
Bulgaria	2 945	2 041	2 394	2720	2875
Czech Republic	4 469	4 668	4 902	5 095	5 096
Hungary	3 334	3 433	3 504	3 544	3 498
Latvia	867	954	1 045	1 074	1 035
Lithuania	1 605	1 756	1 763	1 850	1 870
Poland	14 821	15 963	17 307	19 004	19 520
Romania	3 940	3 736	4 205	4 745	4 980
Slovakia	1 510	1 551	1 679	1 824	1 887
In total	33 490	34 101	36 800	39 856	40 761

Source: Eurostat

In Pomerania, two research centres are currently operating in automotive sector. They are located at the Eaton manufacturing plant in Tczew [Eaton Truck Components and Eaton Automotive]. One of their greatest achievements is the development of the hybrid transmission technology. In addition, the centres specialise in graphical modelling and the design of products and the conduct of simulations and tests.

Eaton is one of main players in the Pomeranian automotive market. The company is also one of the largest suppliers of gear boxes with various load capacities and compressors for passenger car engines. At present, the recipients of devices produced in Tczew are Volkswagen, Audi, Nissan and the Chinese car manufacturer, Chery.

Other suppliers of car components, who placed their plants in Pomerania, are Delphi, Gardner and NordGlass. At Delphi's plant, which was established in Gdansk, car switches are produced for use in cars manufactured by Ford, BMW, General Motors and Renault. British Gardner in turn, at its Tczew plant, produces components for the automotive and air industries. Its customers include: Airbus, Alstom, Lockheed Martin, Bombardier, Eaton, Rolls Royce, SAAB, TRW Aeronautical System and Volvo Aero. On the other hand, the Slupsk plant of NordGlass supplies glass for vehicles of such brands as Solaris, Bombardier, Volvo or PESA Bydgoszcz.

In Slupsk, where two companies operate: Scania and Kapena, there is production of buses and their components. The buses of two leading brands of Scania buses are produced in the Pomerania along with components for other brands, which are then shipped to assembly plants in Africa and Asia. Thanks to further extension of the plant in 2010, 1500 buses can be assembled annually.

Kapena S.A. in turn is a Polish bus producer, whose main shareholder is Cacciamali, a company from Italy. The company represents the French-Italian Irisbus producer in Poland and also offers its own models. In terms of sales, KAPENA SA becomes the third bus manufacturer in Poland. In 2014 the company began working on the development of a new range of buses based on the Euro 6 [European emission standard].

Traditional sectors of the Pomeranian Economy

REFINING INDUSTRY

The largest traditional industry is the refining industry, represented by the largest Pomeranian enterprise – LOTOS S.A. Group [5th place position on the list of the largest enterprises in Poland]. This fuel company extracts and processes crude oil and distributes and sells a wide assortment of crude oil products. Via its subsidiary Petrobaltic and LOTOS Norge, the company is also present on the Baltic Sea and Norwegian continental shelf, where it conducts exploration and extraction of crude oil.

LOTOS S.A. Group:

is the most energy efficient refinery in Central and Eastern Europe in 2012 [ranking by Solomon Associates]

belongs to the group of the best energy companies from all of the world in "Top 250 Global Energy Company" of 2013 [according to Platts and Standard&Poor's]

recognized among 15 most interesting CSR initiatives

LOTOS S.A. Group and PERN "Przyjazn" S.A. entered into an agreement on the construction of underground crude oil and liquid fuel tanks. According to the plans, the tanks will come on stream in Pomerania, which will strengthen even more the safety of the power sector in Poland and other countries from the Baltic Sea region.

MARITIME SECTOR

After 2007, the maritime sector underwent a significant transformation, but it remained the leading industry in the region. The largest enterprises of this sector in Pomerania are renovation and construction shipyards. One of the most important changes in the industry was the creation of new specialisations. Part of the shipyards commenced activity in offshore units. Searching for a new place in the market for themselves, the shipyards have started also to invest in the production of elements for renewable energy generation. For more information see page 21



Apart from the giants, a lot of smaller shipyards operate in the region, specialising in the construction of state-of-the-art boats and luxury yachts. The vast majority of this production is earmarked for export (approximately 90%).

In terms of sales and production, both in the region as well as in the whole country, the largest company in the industry is Grupa Remontowa with Gdanska Stocznia Remontowa in the lead. Grupa Remontowa offers high quality renovation services, conversions and construction of new, fully equipped vessels tailored to the individual needs of the ordering party. Also enterprises from the high technology sector belong to Grupa Remontowa, such as IT-REM, a company specialising in advanced IT solutions for the maritime sector.

Stocznia Gdansk S.A. underwent privatisation in 2007. The new owner is Ukrainian ISD Group. On the basis of an analysis of shipyard production market and forecasts for the near future prepared by McKinsey, the shipyard is focusing its activity on three pillars: construction of vessels handling offshore installations and drilling platforms, production of towers for wind farms and steel structures of various types.

Vessels operating offshore installations and highly specialised vessels are also produced in other Pomeranian shipyards such as: Crist Shipyard, Odys Shipyard, Maritim Shipyard or Remontowa Nauta Shipyard.

About 12 000 maritime businesses are operating in Poland. The operations of more than a half of them (6 000) are based in Pomerania. Almost 4 000 Pomeranian enterprises provide construction and repair services for vessels and offshore structures. The activity of many companies from the maritime sector significantly exceeds the industry's demand. It is estimated that the whole maritime sector in the Region employs more than 41 000 persons.

The potential of the maritime sector in Pomerania is constantly growing thanks to shipyards and other entities involved in construction and renovation of ships, production of on-board devices as well as the development of advanced technology for sea vessels.

Foreign investors conducting activity in the maritime sector find good conditions in the region. For example Rolls-Royce Marine Poland is successfully developing its production here.

ROLLS-ROYCE MARINE POLAND



Our brand is one of our most valuable assets. It attracts talented people and guarantees the production of world-class products. Rolls-Royce Group has been present on Pomerania's market for over 10 years. **The region offers excellent talent pool for Marine Industry – for both engineering and manufacturing.** With this, and in addition with competitive operating cost of the region has resulted to the fact that Rolls-Royce is successfully developing production of deck machinery in Gniew and building a new Service Centre in Gdynia.

EMMANUEL PERRIN

VP Operations

Deck Machinery and Motion Control, Rolls Royce Marine Poland Sp. z o.o.



Rolls-Royce

FOOD INDUSTRY

The food industry is one of the important elements of the Pomeranian economy and the regional labour market. Strong connections between food and drink production and agriculture and fisheries require agricultural production and fisheries to be included in the industry analysis. The food sector stands for more than 10% of sold industry production in Pomerania and employs approximately 19 000 people.

The largest enterprises operating in the Pomeranian food production and processing sector include Iglotex (production and distribution of frozen products) and Poldanor S.A. (production of fodder and swine).

Fish processing is an industry which is specific for food processing in Pomerania, located in the Puck, Slupsk and Leborg districts.

The activity generates the highest turnover, constituting approximately 28% of the sector's sales value. Meat processing has much lower revenues (24% of the sector's turnover) as does the production of oils and fats (11%).

The largest Polish fish processing company operates in Pomerania. Graal S.A. Capital Group dominated the market in terms of diversity of products and volume of revenues (PLN 749.5 m in 2014). Just behind it are Wilbo S.A. and Mropol S.A.

More than half (52%) of food processing plants for fishery products in Poland are located in Pomerania.

COMFORTABLE CONDITIONS FOR CONDUCTING BUSINESS

The region offers world-class conditions for conducting business. **For a couple of years Gdynia has been in the first position in the ranking of the best Polish cities for business (Forbes ranking for 2011).** The region's offer is an answer to dynamically changing conditions for business, and to the demands of entrepreneurs. Companies located in the region belong to the most active in Poland. They cooperate with many entities and institutions at home and abroad.

NEW BUSINESS INFRASTRUCTURE

Undoubtedly, an asset of the region, and especially Tri-City, is office infrastructure. In total, Gdansk, Gdynia and Sopot have over 500 000m² of state-of-the-art office area which is perfect place for companies from the BPO and SSC sectors. The Tri-City market, despite its short history, is extraordinarily promising and it is developing rapidly. It is evidenced by other constructed or planned office facilities and more and more interest on the part of possible lessees.

OFFICE SPACE MARKET IN TRI CITY, Q4 2014

Supply of office space	516 100 m ²
Vacancy rate	11,5 %
Completions in 2015	93 800 m ²
Projects under constructions	126 000 m ²
Base rents in prime locations (EURO/m ² /month)	12.5-13.5

SUPPLY OF OFFICE SPACE IN THE LARGEST CITIES IN POLAND

Warsaw	4 391 900 m ²
Cracow	659 000 m ²
Wroclaw	591 100 m ²
Tri-City	516 100 m ²
Katowice	370 100 m ²
Poznan	332 900 m ²
Lodz	273 800 m ²
Szczecin	125 600 m ²
Lublin	122 200 m ²

In the beginning of 2013 Tri-City was awarded prestigious 'Best City of the Year' title in the BPO/SSC Sector during Polish Outsourcing & Shared Services Awards Gala. Tri-City competed over the title with other nominees: Cracow, Wroclaw and Poznan.

Gdansk was deemed to be one of the 31 most attractive locations in the world (as the only city in Poland) for investments in IT sector [KPMG Report, "Exploring the Global Frontier - The New Emerging Destinations"]

WELL PREPARED LAND FOR INVESTMENTS

Pomerania has an attractive offer of land for investments. The plots on offer are characterised by interesting location, good transport connections with external road system, space suitable for big investment projects as well as the presence of basic utilities. Investors may take advantage of very well prepared land, in convenient locations throughout the whole region. The investment land database is available on the webpage www.investinpomerania.pl

THE MOST ADVANCED TECHNOLOGY PARKS AND INCUBATORS IN POLAND

The Gdansk Science and Technology Park and the Pomeranian Science and Technology Park in Gdynia are the two major technology parks operating in Pomerania. They are places where the development of innovative ideas is stimulated and support is offered in the commercialisation of solutions. The parks have in their offer an excellently equipped laboratory, along with office space and conference rooms. They offer consulting in accountancy and legal aspects of business activity. In the beginning of 2011, the Entrepreneurship Incubator in Cierzno (Człuchowski district) was commissioned. Business space, knowledge and networking opportunities are offered in the business incubator in Gdańsk. Moreover, Słupsk Technological Incubator operates since October 2012, supporting entrepreneurs with high growth potential and those planning innovative implementation. Whereas the Baltic Port of New Technologies is a project joining the revitalization of Gdynia shipyard with supporting entrepreneurship.

Other investments of this kind are also implemented in the region:

- Kwidzyn Industry and Technology Park (KPPT) (Q1 2015)
- Baltic Industrial Park - a state-of-the-art industry and business centre in Gdynia on the post-shipyard area (2014)

A PERFECT PLACE TO LIVE

Pomerania is an exceptional place on the map of Poland and Europe in terms of diversity of landscapes and cultures. It offers all that makes a place attractive to live:

- exceptional location, with beaches, forests and lakes in close proximity,
- diversified entertainment, cultural and sports offer,
- good medical care,
- convenient municipal transport,
- dynamically developing shopping malls, especially appreciated by Scandinavian customers,
- luxury brand car dealers (e.g. Porsche, Lexus, Audi, BMW, Mercedes),
- developed, highest standard accommodation base,
- wide offer of comfortable flats,
- kindergartens and schools with international staff, educating in English and French.



Luzycka Office Park

The conditions available make both students and workers from other regions of the country and world eager to move to Pomerania. Tri-City and the surrounding area are perceived as an attractive place to live and work. Investors easily win staff from outside of Pomerania. The best confirmation of the good quality of life offered by the region are the expats satisfied with their new place of living. All the rankings that evaluate quality of life in Poland put Pomeranian cities in the top positions.

The inhabitants of Pomerania belong to the most satisfied in Poland in terms of place of living. [Source: Diagnosis 2013, ranking of Przekroj magazine 2013].

Gdansk with its history of more than 1 000 years, the multicultural Hanseatic port, Gdynia, which has been dynamically developing since the 1920s, a pearl of modernistic development and the capital of Polish sailing, illustrate the history of Europe and Poland as if through a lens. Sopot in turn, in the 20th century the most popular health resort in Poland, today is often called Monte Carlo of the Baltic Sea.



ADVA OPTICAL NETWORKING



KAZIMIERZ MIOTK
Senior R&D Director
ADVA Optical Networking
Sp. z o.o.



ADVA Optical Networking Sp. z o.o. is a telecommunication and IT company, which has been operating in Pomerania since 2003. We operate in the field of modern technologies so it is especially valuable for us to cooperate with Tri-City's universities which graduates are well prepared to take up work immediately after graduation. Gdansk and Gdynia have always attached great importance to foreign language teaching. Pomerania offers a large number of engineers who speak perfect English, which is crucial in our industry. **We think that companies have to invest in places where you want to live. Tri-City and Kashubia region is a unique place that acts as a magnet for talented and dynamic people.**

It is they who create the ADVA Optical Networking in Poland.

A SEA OF POSSIBILITIES FOR ACTIVE PEOPLE

The region offers diverse possibilities for people who live to spend free time actively. The Hel Peninsula, thanks to the best conditions in this part of Europe, is a Mecca for windsurfers and kitesurfers in Poland. Modern yacht marinas attract numerous sailors.

Tri-City, along with its extensive Landscape Park, is also a paradise for cyclists, for whom also a couple hundred kilometres of cycle lanes are available. For golfers, Pomerania offers two full size golf courses, including the course in Postolowo, recognised by Golf Digest as the best one in Poland. The Pomerania region also offers winter sports. Seven ski slopes, including one in Sopot, constitute an interesting recreation alternative.

Gdansk has been selected as one of co-host cities of EURO 2012 European Football Championship. During the tournament, group matches and one of the quarterfinals were played in Pomerania. Thus, an intense preparatory works were conducted in whole Tri-City. The hotel and communication infrastructure were expanded in the city. Also, newly constructed second terminal at the airport was opened in April 2012. The total cost of preparations for EURO 2012 is estimated at 3 billion euro.

CULTURAL INSPIRATIONS

Tri-City offers numerous cultural events to citizens and tourists. The largest cyclical musical event is the Heineken Open'er Festival in Gdynia, which in 2009 and 2010 was awarded with the European Festival Award in the "Best Major Festival" category and was nominated to the award in 2012 and 2013. The most prominent event of Polish cinematography, the Polish Film Festival, also takes place in Gdynia. Gdansk attracts admirers of theatre and Shakespeare thanks to the annual international Shakespeare Festival. Construction of a new building of Gdansk Shakespeare Theatre was completed in 2014. Also the International Street & Open-Air Theatres Festival FETA enjoys high interest. The historical performance of the siege of Malbork castle in turn attracts annually approx. 120 000 domestic and foreign spectators.



FEEL PERFECTLY AT HOME

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Finding a nice place to live is also important in quality of life. Tri-City offers full range of residential real estate of diversified standard, at favourable rental prices. Outside the metropolitan area rental rates and purchase price of real estate are significantly lower [by about 35%].

RESIDENTIAL MARKET (February 2015)

Rental rates

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Studio – ca. 175 EUR

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One-bedroom – ca. 190-240 EUR

.....

Two-bedroom – ca. 240-312 EUR

.....

Purchase price of housing – ca. 1 200 EUR/sq.m

.....

For foreigners coming with families there is also an educational offer ensuring education in foreign languages, both at kindergarten, as well as secondary school level. Children are provided with care in comfortable conditions to learn. Two high schools offer the opportunity of passing the International Baccalaureate. Apart from the English offer, there is also an opportunity of learning in French. French Kindergarten and Highschool no. 2, providing Bilingual Baccalaureate operate under auspices of French Embassy.

WORLD BUSINESS GIANTS WHO APPRECIATED GOOD CONDITIONS OF THE POMERANIA

SELECTED FOREIGN INVESTMENTS IN THE POMERANIA

COUNTRY	ENTERPRISE	SECTOR
Germany	Lufthansa Systems Poland	ICT
	Ergo Hestia	Insurance
	Dr. Oetker	Food processing
	Bayer	Accounting and Finance
	Multimedia Polska	ICT
	ThyssenKrupp	Accounting and Finance
The United States The Netherlands	Smurfit Kappa Polska	Paper packaging production
	Curver Polska	Plastic production
The Netherlands	Nordea Bank Polska	Banking
	Scania Production Słupsk	Automotive
Sweden	Relacom	ICT
	Skanska	Construction
	Jysk	Commerce
	Prime Food	Food industry
Denmark	Arla	Accounting and finance
	International Paper - Kwidzyn Sp. z o.o.	Paper production
	Jabil Circuit Polska	Electronics
The United States	Jabil Assembly Polska	Electronics
	Flextronics International Polska	Electronics
	Eaton	Automotive
	Delphi Polska	Automotive
	Thomson Reuters	Analytic services
	Compuware	ICT
	Intel Technology Poland	ICT
	IBM	ICT
	Acxiom	ICT
	First Data	Accounting and finance
	ProLogis	Real estate
	Panattoni	Real estate

COUNTRY	ENTERPRISE	SECTOR
The United States	Coca Cola	Food industry
	Sony Pictures	ICT and finance
	OIE Support	business services
	Staples	Center of Competence
	Coleman	Center of Competence
	Epam	ICT
United Kingdom	Misys	ICT
France	EDF	Services
	Saur Neptun Gdańsk	Services
	Lacroix Electronics	Electronics
	SII	ICT
Australia	DCT Gdańsk	Maritime
Norway	Nevion Manufacturing	ICT
	Rolls Royce Marine Polska	Maritime Production
	Powel AS	ICT
	Schibsted	ICT
Ireland	Fineos	ICT
	Kainos	ICT
Spain	Geoban	Accounting and finance
Philippines	Baltic Container Terminal	Maritime
China	Gdynia Container Terminal	Maritime
Belgium	Sea-invest Polska	Maritime
India	WNS	BPO
Finland	Metsä	SSC
	Kemira	BPO/SSC
	Alteams	Die casting

SUPPORT FOR INVESTORS

SPECIAL ECONOMIC ZONES (SEZ)

Two special economic zones operate in Pomerania – the Pomeranian Special Economic Zone and the Słupsk Special Economic Zone. Their aim is to create investment conditions tailored to the individual needs of investors.

SEZ OFFER:

- plots equipped with full technical infrastructure,
- income tax exemption (PIT or CIT),
- formal support for the investment process.

SUPPORT CONDITIONS WITHIN SEZ:

- the amount of tax exemption depends on the amount of investment or the number of created workplaces,
- business activity must be conducted for at least 5 years as of the day of completion of the investment (3 years in the case of SMEs),
- the total of tax exemptions may not exceed limits stemming from EU regulations concerning regional support,
- minimum investment – EUR 100 thousand.

INTERNATIONAL PAPER KWIDZYN SP. Z O.O.



MAREK KRZYKOWSKI
Chairman of the Board,
International Paper
Kwidzyn Sp. z o.o.

INTERNATIONAL  PAPER

International Paper – Kwidzyn Sp. z o.o. has been a part of the biggest paper corporation since 1992. The company belongs to the Pomeranian Special Economic Zone and takes advantage of the corporate income tax relief, which significantly lowers the costs of doing business in Pomerania and is an incentive for IP to invest. International Paper-Kwidzyn employs, along with cooperating companies, approximately 3 000 people. It has a qualified, experienced and stable team. Many of its members are Gdansk University of Technology and University of Gdansk graduates, as well as graduates of other regional university colleges. Due to the excellent operations of the company to date, easy access to qualified personnel, the increasing attractiveness of Pomerania and support on the part of local government authorities, the company plans further investments and further development, which will also contribute to the development of the region.

THE CITY OF GDANSK SCHOLARSHIP PROGRAMME

The City of Gdansk Scholarship Programme is an instrument of investment support which is unique on a national level and available solely for investors investing within the City of Gdansk. The instrument serves the purpose of granting subsidies for training (in Poland or abroad) for future employees. The subsidy covers the costs of training, costs of travel and living for 6 months (the limit is PLN 30 000 per person).



Tczew Czajkowy Subzone – Flextronics

GOVERNMENT GRANTS AND EUROPEAN UNION FUNDS

Pomerania, thanks to Poland's accession to the European Union, may offer support to investors in the form of subsidies from European Union funds. In addition, the Polish government offers grants to investors for the creation of workplaces and investments in fixed assets. The government grants are designated for entities investing in the automotive industry, electronics, aviation, business services, research activity and biotechnology. The basis for granting the support is an agreement between the Minister of Economy and the investor as well as a resolution of the Council of Ministers, authorising the payment of funds.

EXEMPTION FROM REAL ESTATE TAX

For investors, who create new workplaces, there is a possibility of total or partial exemption from real estate tax. The exemption is of a general nature (for all entrepreneurs fulfilling certain conditions) and may be considered as a regional support (depending on individual legal solutions contained in the commune resolution). The exemptions are granted based on a Local commune resolution.

NORDEA BANK POLSKA S.A.



WŁODZIMIERZ KICIŃSKI
Former CEO of Nordea
Bank Polska S.A.

From the point of view of Nordea Bank – a financial institution which employs more than 500 employees – one of the most important factors related to business operations is human capital. Thus, the presence of Pomerania's universities, which educates high-class specialists in field of economics and management, can not be overestimated. **I reckon that local investing conditions profits from a growing number of business support institutions, which specialize in business service, including those which offer the most innovating solutions.**

Undoubtedly, Pomerania's advantage is its high quality of life, which is reflected in residents' satisfaction with local government services. **This proves that region and its authorities pay attention to sustainable and balanced growth, which creates stable business conditions.**



SONY PICTURES GLOBAL BUSINESS SERVICES



JAREK ZBORALSKI
HR Director
Sony Pictures
Global Business Services

In less than 14 months we created from scratch an accounting services centre in Gdynia which provides support for all our European companies.

During that time:

- we acquired high quality office space and equipped it with modern technical infrastructure;
- we recruited, employed and trained more than 100 employees who speak 15 languages (including several foreigners who were willing to relocate to Gdynia due to its attractiveness);
- we migrated and launched process of centralised accounting service for all our European entities and lines of business.

During the construction phase of our centre, and after its successful launch, we were receiving substantial support from local authorities and cooperating consulting companies, including Invest in Pomerania team.

The friendly investment climate of Tri-City and the availability of highly qualified and multilingual staff are additional reasons which convinced us that our decision was right.

We have now entered another stage of our development and further investment.



EXEMPTION FROM TAX ON MEANS OF TRANSPORTATION

There is a possibility of total or partial exemption from tax on means of transportation. The tax concerns trucks and buses only. The exemption is of a general nature and since April 2007 it has been recognised as public support. The exemptions are granted based on a Local commune resolution.



Gdynia

Source: City Hall of Gdynia / photo: Maciej Bejma

INVEST IN POMERANIA - EFFICIENT SUPPORT FOR INVESTORS

The Invest in Pomerania team was appointed to support investors at each stage of the investment process. We offer free-of-charge and comprehensive care.

The structure and operations of the investor service system were developed by PwC.

We will prepare for you:

- an investment offer based on the investor's needs,
- a visit to the region,
- information materials and reports concerning the region's economy,
- information about legal standards related to business activity conducted in Poland and Pomerania as well as available investment support forms,
- meeting with prospective business partners in the region,
- support in cooperation with local authorities.

WE STAND OUT DUE TO THE BROAD RANGE OF POST-INVESTMENT SUPPORT.

Satisfied investors who have chosen our region are the best evidence for the fact that the Pomerania is an excellent location for investments.

You are invited to visit our website: www.investinpomerania.pl. You will find there comprehensive information about investment conditions in Pomerania, inter alia:

- reports on regional economy (possibility of individual report generation),
- office and warehouse space market analyses,
- current investment offer,
- reports on industries with the largest investment potential,
- information about the most important business events.

The website is available in many language versions.

Invest in Pomerania was cofounded by:

Pomorskie Voivodeship ■ Pomeranian Special Economic Zone ■ Slupsk Special Economic Zone ■ City of Gdansk
City of Gdynia ■ City of Sopot ■ City of Slupsk ■ Gdansk Economic Development Agency InvestGDA ■ Pomerania
Development Agency – leader of the initiative

The list can be further expanded with other entities from Pomerania.

Pomerania Development Agency Co. (Agencja Rozwoju Pomorza S.A.—ARP S.A.) launched its activity in 1992. It is the strong institution pointing the standards of entrepreneurship support for Pomerania. The Agency is also an important partner for local authorities in the area of creating regional development.

ARP S.A. has been supporting and assisting Pomeranian entrepreneurs in consuming EU grants for ten-odd years. At present Agency is implementing EU funds for micro, small and medium size enterprises and business support institutions in Regional Operational Programme for Pomorskie Voivodeship in 2007–2013 and in Operational Programme Innovative Economy.

Since 2009, the Agency has been engaged in implementation of **Economic Promotion and Information System for Pomorskie Voivodeship**. Its main goal is to systematize all activities in the field of economic promotion of the region in Poland and abroad in the years 2009–2012. Due to the initiative of PDA Co., **Invest in Pomerania** was established – a coordinated system of investors' support.

The Agency realizes also other projects of great importance for Pomerania: it manages the Capital Fund which invests in innovative projects and provides professional and comprehensive information, consulting and training services.

High quality of provided services has been proven by many certificates: ISO 9001, KSU, Ministry of Economy certificate and other appropriate accreditations.

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Gdansk, 2015

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Agencja Rozwoju Pomorza S.A.



REGIONAL PROGRAMME
NATIONAL COHESION STRATEGY



EUROPEAN UNION
EUROPEAN REGIONAL
DEVELOPMENT FUND



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