

POMORSKIE IN BRIEF



Set course for
Pomorskie

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POMORSKIE IN BRIEF

POMORSKIE AT A GLANCE

Area: 18293 km²

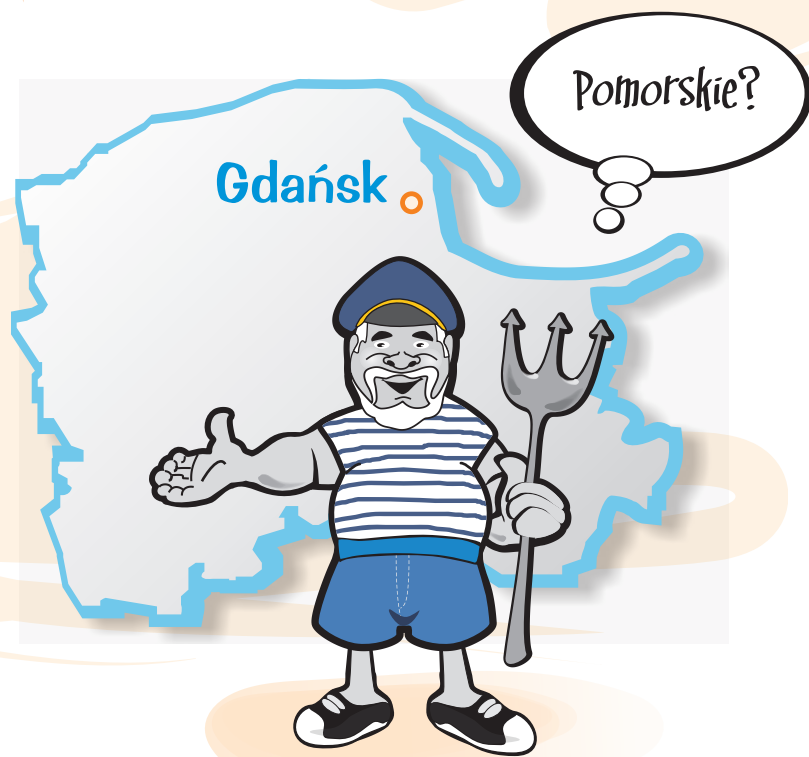
Population: 2 203 000

Density: 120 people/km²

Population growth rate: + 2,5 /1000 people

Urban rate: 67%

Capital: Gdańsk



The biggest cities (in thousands)

Gdańsk (461,6)

Gdynia (253,8)

Słupsk (98,7)

Tczew (60,1)

Starogard Gdański (48,9)

Wejherowo (44,7)

Sopot (40,3)

Malbork (40,1)

Chojnice (39,4)

Kwidzyn (37,4)

Lębork (36,9)

The agglomeration of Gdańsk, Gdynia and Sopot is often referred to as Tricity.

Language: Polish

PKB per capita: 10658,5 Euro

Export: ships, electrical machinery, minerals, chemicals and fuels

Major destinations: Norway, Germany, United Kingdom, Sweden, The Netherlands

Import: chemicals, vehicles, electrical machinery, minerals

Sea ports:

Bulk cargo (2006): 38 411 400 tonne

The biggest sea ports: Gdańsk and Gdynia

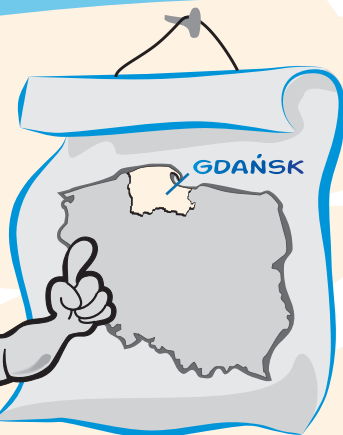
Fishing harbours: Hel, Łeba, Ustka, Puck, Władysławowo, Jastarnia, Piaski, Krynica Morska, Rowy

Small harbours : 21

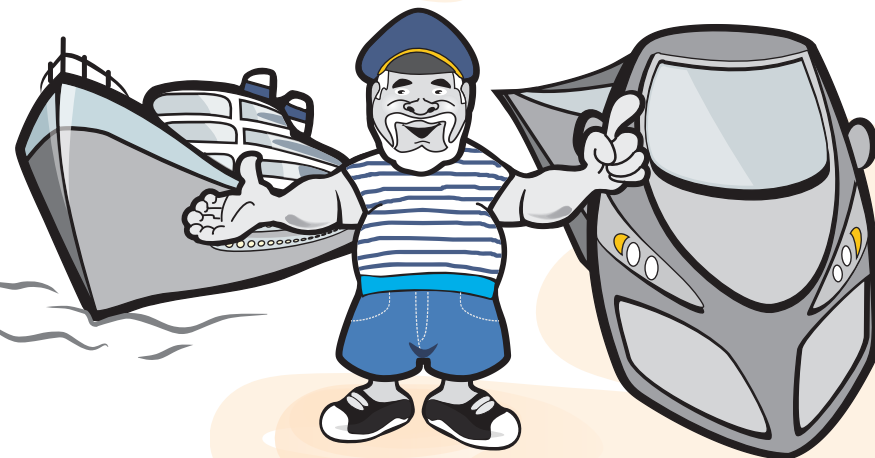
Airport: Gdańsk Lech Walesa Airport - 10 km away from the centre of Gdańsk

Number of tourists: about 4,2 mln (2006)

How far is it?



How can I get there?



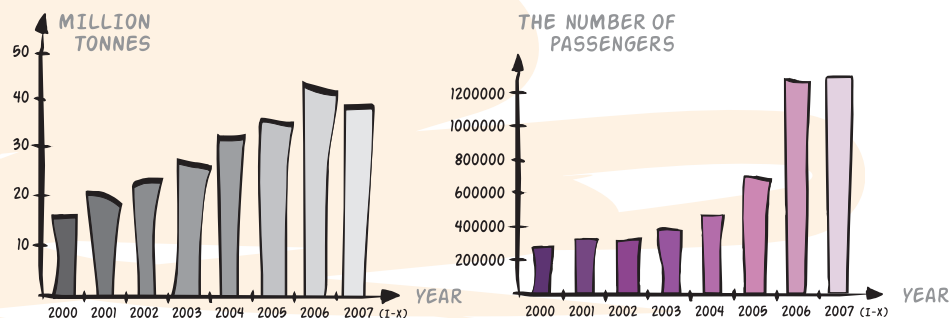
Stockholm	594 km
Copenhagen	800 km
Oslo	1137 km
London	1589 km
Berlin	483 km
Hamburg	749 km
Brussels	1258 km
Paris	1542 km
Helsinki	1110 km
Moscow	1550 km
Rome	2029 km
Madrid	2815 km

AIR TRANSPORT



Gdańsk Lech Walesa Airport

Cargo volume (in million tonnes) and the number of passengers



Gdańsk airport has direct flights to Frankfurt and Copenhagen, two world's leading transport centres, which makes Pomorskie Voivodeship well connected to all European and world's destinations.

Passenger connections

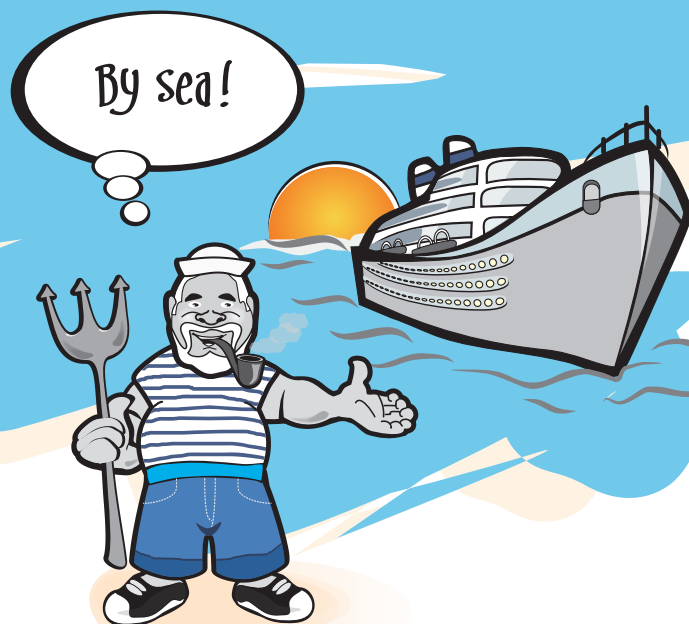
Bristol
Cork
Dortmund
Doncaster-Sheffield
Dublin
Edinburgh
Frankfurt
Frankfurt Hahn
Glasgow-Prestwick
Hamburg
Hamburg-Lubeck
Helsinki
Colonia/Bonn
Copenhagen
Liverpool
London Gatwick
London Luton

Cargo connections

Berlin
Budapest /Prague
Frankfurt
Hamburg
Copenhagen
Warsaw
Malmö
Kaunas



BY SEA



The Port of Gdańsk

Container handling volume (in TEU)

2002	2003	2004	2005	2006	2007 (I-X)
20 136	22 537	43 739	70 014	78 364	76 758

Bulk cargo handling (in tonnes)

2002	2003	2004	2005	2006	2007 (I-X)
17 371 401	21 292 996	23 314 926	23 341 022	22 407 129	16 922 757

Passenger traffic

2000	2004	2005	2006
141 881	172 601	198 298	156 511

Port of Gdynia

Container handling volume (TEU)

2002	2003	2004	2005	2006	2007 (I-X)
252 247	308 619	377 236	400 165	461 170	456 930

Bulk cargo handling (in tonnes)

2002	2003	2004	2005	2006	2007 (I-IX)
9 365 000	9 748 000	10 744 000	12 230 000	14 199 000	12 680 700

Passenger traffic

2000	2004	2005	2006
264 470	433 451	392 749	460 231

Ports in Gdańsk and Gdynia are the largest load centres on the Polish coast and in the southern part of the Baltic Sea. Due to large investment projects, the ports are the fastest growing and the most dynamic of all Baltic ports. In the few years' time, the ports are standing great chance to become the major load centres and distribution hubs for Central and Eastern Europe. It is estimated that the port's capacity in Gdynia and Gdańsk will amount to 7 million containers a year.

Regular sea connections from Gdańsk and Gdynia

Everyday

Nynäshamn, Karlskrona (Sweden)

Few times a week

Helsinki, Hanko (Finland)

Rotterdam (The Netherlands)

Klaipeda (Lithuania)

Bremerhaven and Hamburg (Germany)

Once a week

Aarhus (Denmark)

Antwerp (Belgium)

Amsterdam (The Netherlands)

Immingham, Newcastle and Teesport, Hull, Felixstowe (United Kingdom)

Södertälje, Trelleborg (Sweden)

Liepāja (Latvia)

Few times a month

San Antonio Este, San Pedro (Argentina)

Barcelona (Spain)

Alexandria (Egypt)

Beirut (Lebanon)

Kaliningrad (Russia)

Livorno (Italy)

St. Petersburg (Russia)

Latakia (Syria)

Once a month

Bilbao (Spain)

Barranquilla, Cartagena, Turbo (Columbia)

Guanta, Porto Cabello, Maracaibo (Venezuela)

Buenos Aires (Argentina)

Bridgetown (Barbados)

Rio Grande, Santos, Rio de Janeiro, Recife (Brazil)

New Orleans, Tampa, Philadelphia, Savannah, Brownsville, Baltimore,

Houston, Wilmington, Charleston, Mobile (USA)

Talcahuano, San Antonio, Valparaíso, Arica, Antofagasta (Chile)

Shanghai, Huangpu, Xingang, Dalian (China)

Guayaquil, Esmeraldas (Ecuador)

Ashdod, Haifa (Israel)

Warri, Lagos (Nigeria)

San Juan (Puerto Rico)

Kingston (Jamaica)

Rio Haina (Dominican Republic)

Georgetown (Guyana)

Santa Tomas de Castillo (Guatemala)

Port-au-Prince (Haiti)

Puerto Cortes, San Lorenzo (Honduras)

Puerto Limon (Costa Rica)

Misurato (Libya)

Fort de France (Martinique)

Veracruz, Tampico (Mexico)

Puerto Sandino, Corinto (Nicaragua)

Cristobal (Panama)

Callao (Peru)

San Juan (Puerto Rico)

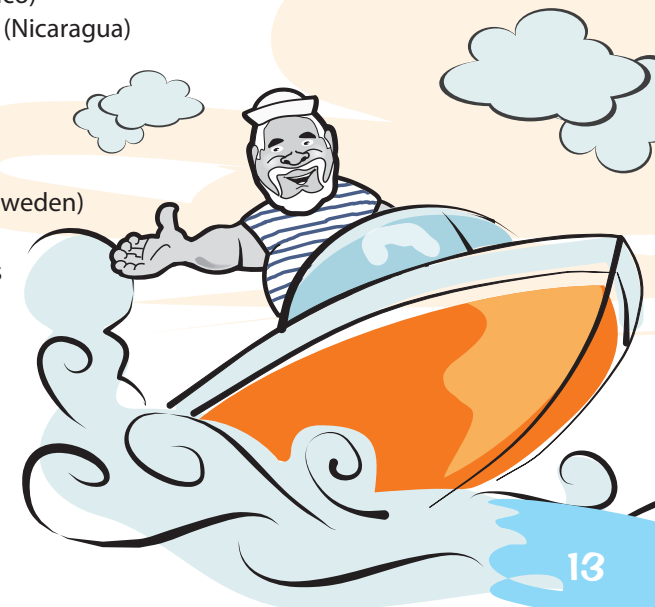
Acajutla (Salvador)

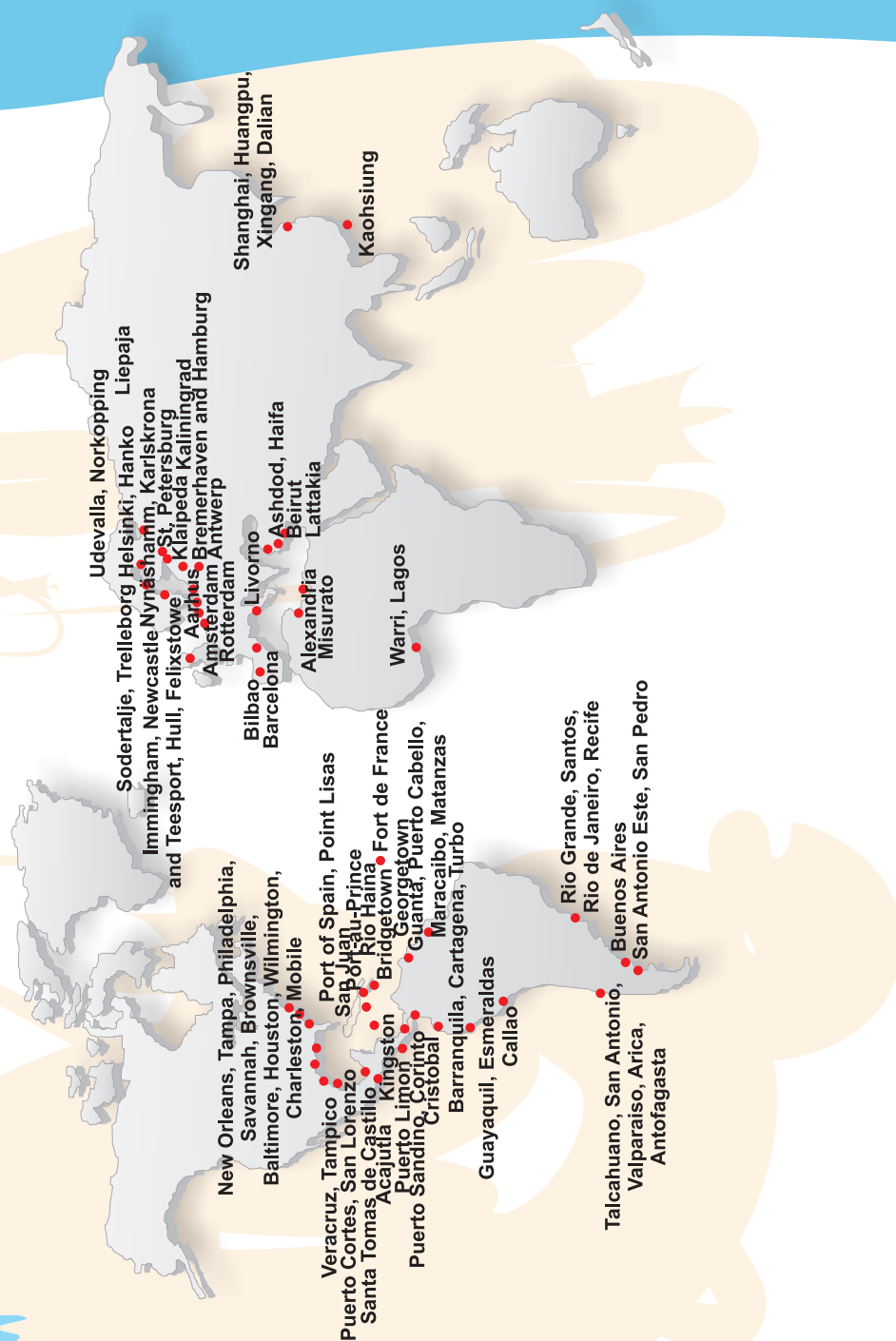
Udevalla, Norkopping (Sweden)

Kaohsiung (Taiwan)

Port of Spain, Point Lisas

(Trinidad and Tobago)



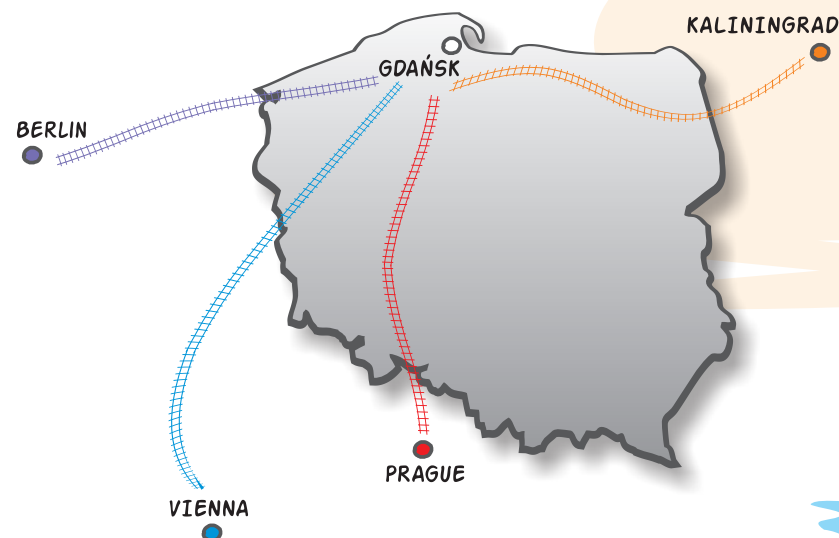


By train!



Railway:

Tricity – Koszalin – Szczecin – to Poland's western border
 Tricity – Bydgoszcz – Łódź – Katowice – with railway branch lines to Poznań and Wrocław, and further to the southern and western borders
 Tricity – Warszawa – Kraków – to Poland's southern border
 Tricity – Elbląg – Olsztyn – Białystok, with railway branch lines to Kaliningrad and Poland's eastern border





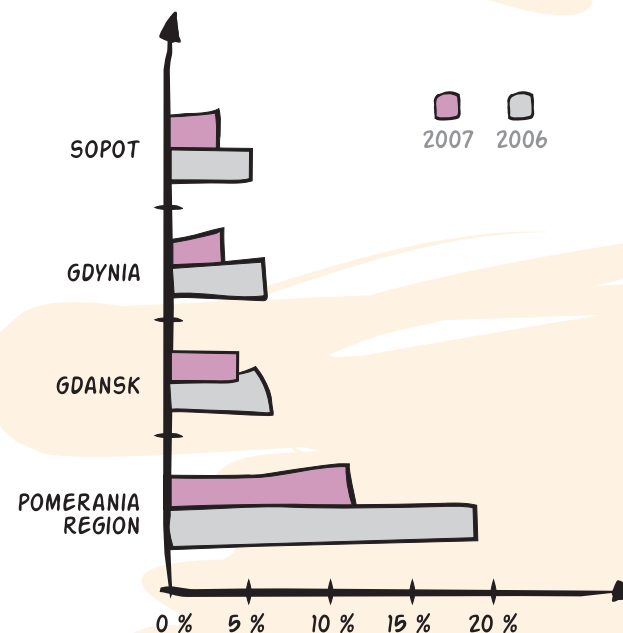
Who lives
in Pomorskie?



Working age population: 65%

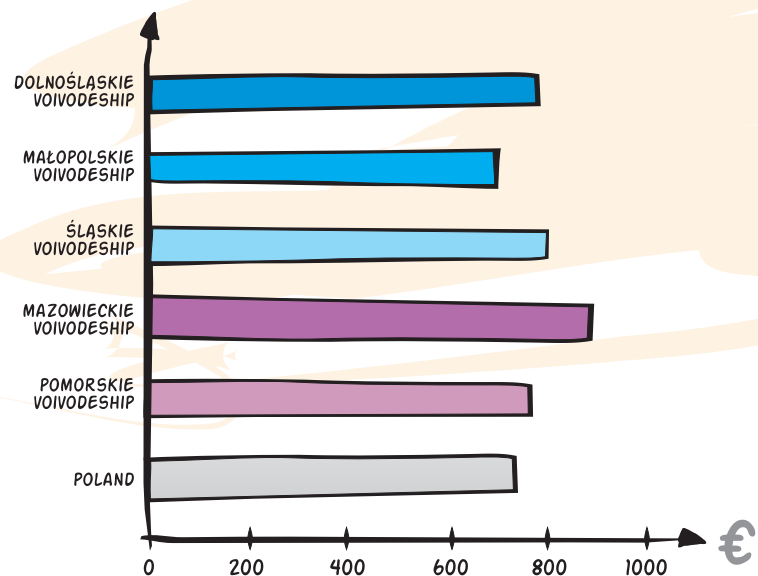
Population growth rate - significantly higher than Poland's average:
Poland: - 0,15/ 1000 os.
Pomorskie Voivodeship: + 2,5/ 1000 os.

Unemployment rate





Average monthly gross salary (Euro*) in Pomorskie Voivodeship when compared to other regions (1st quarter of 2007)



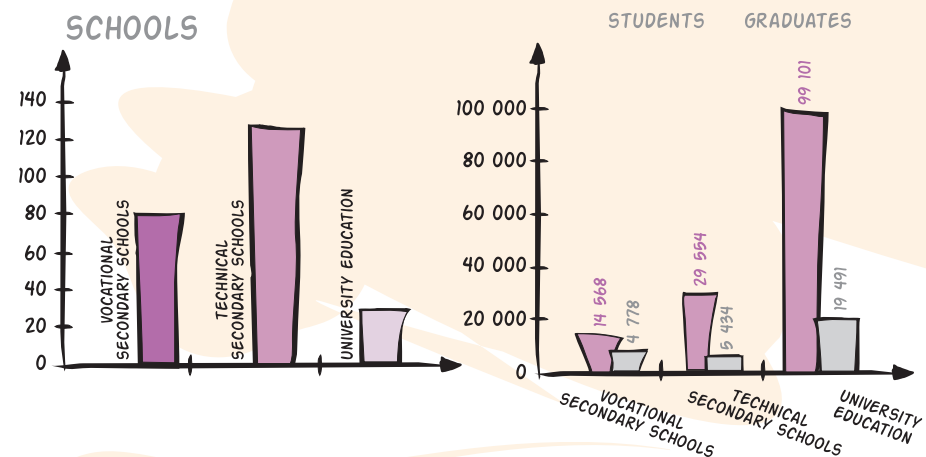
* Euro exchange rate as for 1st March 2007



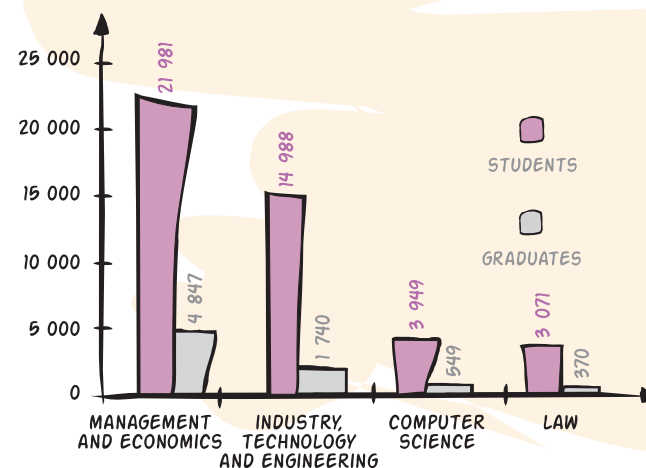
Well-educated people

11% (about 200 thousands) of the population in the region have university degree - significantly higher than Poland's average

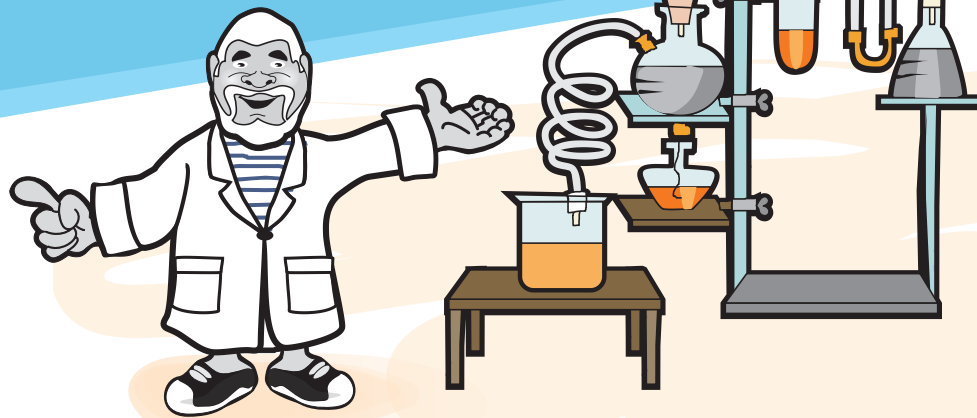
Number of schools and students



Business - related faculties



INNOVATIVE PEOPLE



Transfer of technology from universities to industry

Pomerania Science and Technology Park in Gdynia

tel.: +48 (0) 58 735 11 40/41

e-mail: ppnt@ppnt.gdynia.pl, www.ppnt.gdynia.pl

Gdańsk Science and Technology Park

tel: +48 (0) 58 306 35 31

e-mail: w.wandalowski@strefa.gda.pl, www.strefa.gda.pl

Starogard Industrial Park

tel: +48 (0) 58 563 10 41, +48 (0) 58 563 10 43

e-mail: biuro@starogard-park.com, www.pl.starogard-park.com

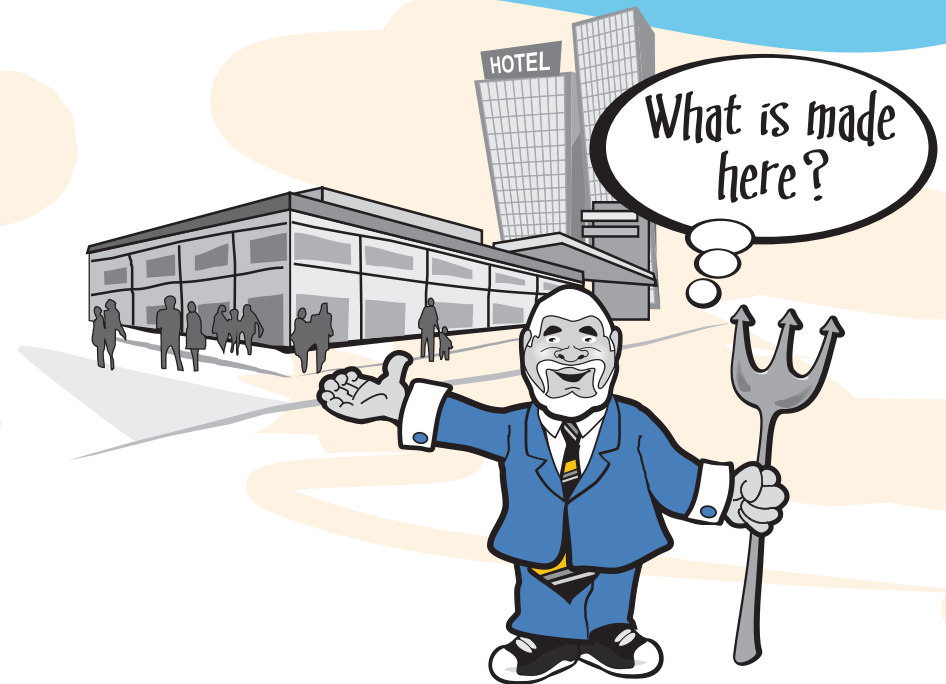
Network of Research & Development Institutes

Network of Centers of Excellence and Competences

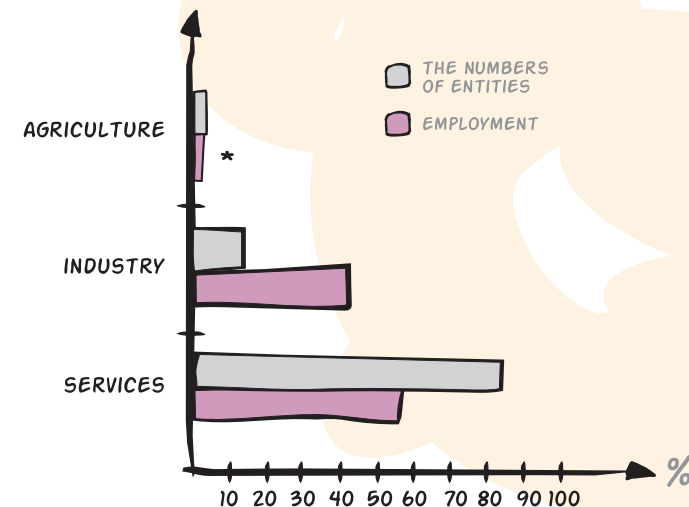
e-mail : www.madeinpomorskie.pl/finanse/innowacja/adresy.htm

Regional universities - Gdansk University of Technology (www.pg.gda.pl), University of Gdansk (www.ug.gda.pl), Gdynia Maritime University (www.am.gdynia.pl), Polish Naval Academy (www.amw.gdynia.pl) - provide perfect inflow of well educated personnel to the high-tech sectors.

ECONOMY IN POMERANIA



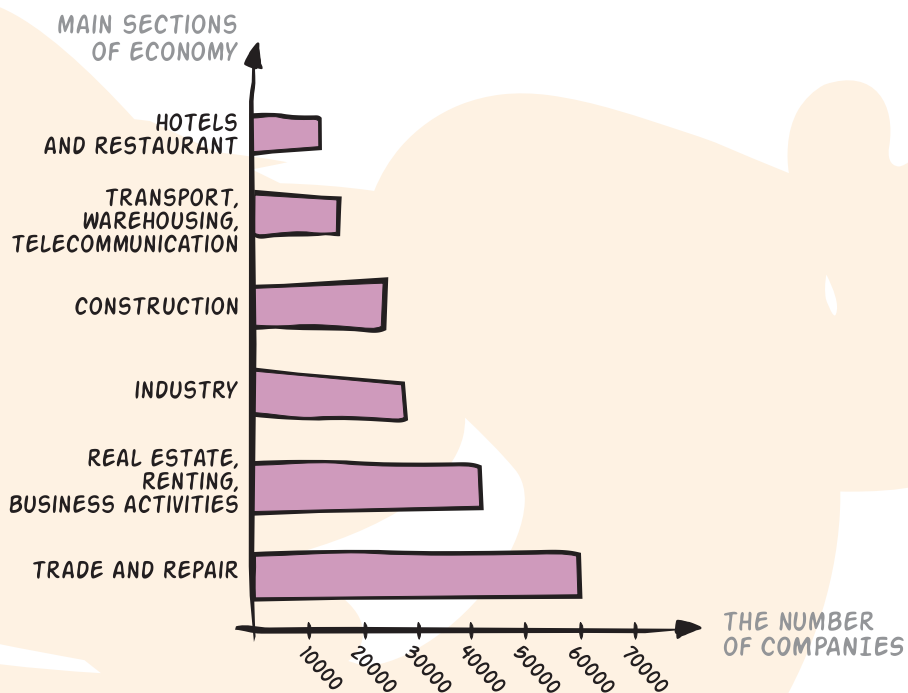
Main sectors and employment



Public and private sector - number of enterprises

STATE-OWNED ENTERPRISES	COMMERCIAL ENTERPRISES
10 100	221 900

The main sections of economy



Traditional industries in Pomorskie

Maritime Industry
Fish Processing
Sea Transport

Rapidly growing industries in Pomorskie:

High-tech Industries
Logistics
Tourism
Food Processing

The largest companies by revenues in Pomorskie (2006)

LOTOS Co. (petroleum products)
ENERGA Co. (electricity supply)
INTERNATIONAL PAPER KWIDZYN (paper and pulp products)
GDYNIA SHIPYARD Co.
(building and repairing of ships and boats)
JABIL CIRCUIT POLAND Ltd.
(manufacturing of electronic machinery)
GE MONEY BANK (financial intermediary)
STU ERGO HESTIA Co. (insurance)
EL NORD (electricity provider)
REMONTOWA Co. - SHIPYARD (ship building and repairing)
JABIL ASSEMBLY POLAND Ltd.
(manufacturing of electronic machinery)

LOTOS

ENERGA

INTERNATIONAL PAPER

GDYNIA

JABIL

GE Money Bank

ERGO **HESTIA**

E = ELNORD

REMONTOWA

Who has already
trusted Pomorskie?



Foreign Direct Investments in Pomorskie - The main investors in selected sectors in the region

Sea transport and logistics

DEEPWATER CONTAINER TERMINAL GDAŃSK Co., UK
BALTIC CONTAINER TERMINAL Ltd., ICTS, Philippines
GDYNIA CONTAINER TERMINAL Ltd., Hutchinson Port Holdings, China

Information technology and electronics

FLEXTRONICS, USA
JABIL CIRCUIT POLAND Ltd., USA
INTEL TECHNOLOGY POLAND Ltd., USA
ZENSAR TECHNOLOGIES POLAND, India
COMPUWARE Co., USA
LUFTHANSA SYSTEMS POLAND Ltd., Germany

Industry

INTERNATIONAL PAPER KWIDZYN, USA (manufacturing of pulp and paper)
THYSSENKRUPP, Germany (manufacturing of automotive machinery)
SURUGA SEIKI, Japan (manufacturing of machinery and equipment)

Finance

GE MONEY BANK, USA (financial intermediary)
NORDEA BANK, Sweden (financial intermediary)



Construction

SKANSKA, Sweden
SAINT-GOBAIN, France
NCC, Sweden



Food industry

FARM FRIES POLAND Ltd., The Netherlands
COCA COLA COMPANY, USA
DR. OETKER, Germany



Service

SAUR NEPTUN GDAŃSK, France
EDF, Germany
REUTERS - CONTENT DATA PROCESSING, UK



Where can I find information?



Useful addresses for foreign investors

Pomeranian Special Economic Zone - Marketing Department

tel: + 48 (0) 58 555 97 17
e-mail: marketing@strefa.gda.pl
www.strefa.gda.pl

Słupsk Special Economic Zone

tel: +48 (0) 59 841 28 92
e-mail: office@parr.slupsk.pl
www.sse.slupsk.pl

Pomerania Development Agency (Investor Information Centre)

tel: +48 (0) 58 32 33 136
e-mail: barbara.merchel@arp.gda.pl
www.arp.gda.pl

Office of the Marshal of the Pomorskie Voivodeship:

- Department of International Co-operation

tel. +48 (0) 58 326 17 01
e-mail: dwz@woj-pomorskie.pl
www.woj-pomorskie.pl

- Department of Economic Development

tel. +48 (0) 58 326 83 00
e-mail: drg@woj-pomorskie.pl
www.woj-pomorskie.pl

Chambers of Commerce

Polish-Swedish Chamber of Commerce

tel: +48 (0) 58 763 14 69
e-mail: psig@psig.com.pl
www.psig.com.pl

Chinese-Polish Chamber of Commerce

tel: +48 (0) 58 5501883
e-mail: pchig@pchig.pl
www.pchig.pl

Netherlands-Polish Chamber of Commerce

tel: +48 (0) 58 324 88 72
e-mail: Gdańsk.office@nlchamber.pl
www.nlchamber.pl

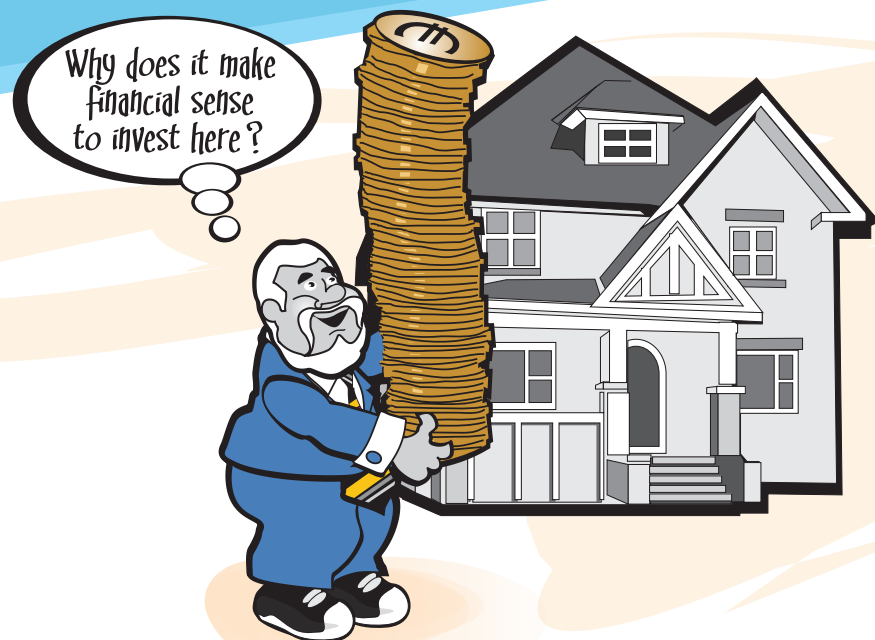
Scandinavian-Polish Chamber of Commerce

tel: +48 (0) 58 661 17 27
e-mail: jesper.kristiansen@hexacon.pl
www.spcc.pl

Hansa Office

tel: +48 (0) 58 301 86 86
e-mail: shb.gdansk@logonet.pl

INCENTIVES FOR INVESTORS:



Public aid may take the following forms:

- income tax exemptions in the Special Economic Zones
- real estate tax exemptions
- employment support from local labour offices
- European Union funds

It is possible to combine these instruments however the total value all types of public aid provided to an investor cannot exceed the amount of admissible public aid. In the years 2007-2013 in the Pomorskie Voivodeship it is 40% of eligible costs of investment. For small enterprises the maximum aid intensity is increased by additional 20% (up to 60%). For medium-sized enterprises the maximum aid intensity is increased by additional 10 % (up to 50%).

More information – www.fundusze-strukturalne.gov.pl



2 Special Economic Zones

Special Economic Zones (SEZ) constitute developed land with all technical facilities where investors may enjoy income tax exemption (PIT or CIT). Tax exemptions in SEZ are granted with regard to investment value or to the number of newly created jobs. In addition to this, companies operating in SEZ have access to free advisory support for all the formalities required for the investment. In the Pomorskie Voivodeship there are two SEZ – Pomoranian Special Economic Zone (www.strefa.gda.pl) and Słupsk Special Economic Zone (www.slupsk.sse.pl)

Pomoranian Special Economic Zone - Marketing Department

tel: + 48 (0) 58 555 97 17

e-mail: marketing@strefa.gda.pl

www.strefa.gda.pl

Słupsk Special Economic Zone

tel: +48 (0) 59 841 28 92

e-mail: office@parr.slupsk.pl

www.sse.slupsk.pl



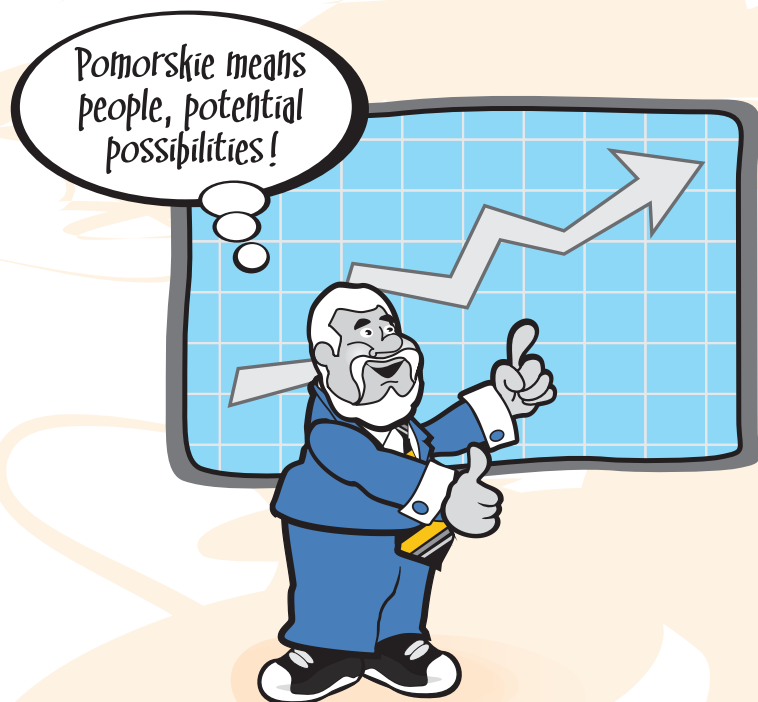
Local Incentives

City councils and commune councils may decide on exemptions from real estate tax and tax on means of transport for investors creating new workplaces. Local government may provide help for investment projects and co-finance technical infrastructure or improve transport and road facilities for the planned investment. Local labour offices offer help in the form of recruitment, training or financing the workplace equipment and social insurance costs for entrepreneurs hiring the unemployed.



European Union Funds

EU Structural Funds support enterprises by financing their investment projects and consultations as well as training for their employees. Most of the programmes from the programming period 2004-2006 have been finalised. New funds are available within the programming period 2007-2013.



Why is it worth investing in Pomorskie?

highly-skilled and well - educated workforce
young and fast growing working population
strategic location - The Baltic Sea; easy access to the North of Europe's markets and suppliers
easy access to ports; huge potential for logistic centre

rapidly expanding road network due to infrastructure projects
fast growing high tech industry
well established business environment
huge potential for tourist and business conference centre
high standard of living
fast growing consumer market (dramatic increase in retail sales by 19,8% - when compared to last year figures)
easy access to a great number of investor incentives
(2 Special Economic Zones)



Gdynia is rated the best city (up to 300 000 residents) to do business in Poland according to magazine 'Forbes' (2007).



Sopot is the best city (up to 100 000 residents) to do business in Poland according to magazine 'Forbes' (2007).



local authorities are rated one of the most effective in EU grants absorption (Price Waterhouse Coopers 2006)



The effectiveness of Gdańsk local authorities in absorbing EU grants has exceeded the national average by 40% according to Price Waterhouse Coopers



Pomorskie is also ideal place to relax

spectacular sandy beaches
lakes and national parks
sites with one thousand years of history
dramatic coastline with wonderful opportunities for water sport; yachting, windsurfing, kite surfing;
restaurants
nightclubs
theatres, opera



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www.woj-pomorskie.pl, www.wrotapomorza.pl

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