



kujawsko-pomorskie

Total area of the voivodeship	17 972 km ²
Number of citizens: - in urban areas	2 083,9 thous. 59.5 %
Population per 1 km ²	116 persons/km ²
Principal cities	Bydgoszcz (voivode seat), Toruń (self -government seat)
Other major towns in the voivodeship	Włocławek, Grudziądz, Inowrocław
Special Economic Zones	Pomeranian Special Economic Zone
Industrial & Technology Parks	Bydgoszcz Industrial and Technological Park, Grudziądz Industrial Park, Toruń Technology Park, Solec Kujawski Industrial Park, Vistula Park and Vistula Park II in Świecie, Włocławek Economic Development Area - Industrial and Technological Park, Noteć Industrial Park in Paterek, Płużnica Investment Park
Regional Investor Assistance Centre	Toruń
International airport	Bydgoszcz

Source: Central Statistical Office, *Statistical Bulletin of Kujawsko-Pomorskie Voivodeship for the 1st Q of 2017*, Bydgoszcz May 2017

Investment opportunities

- industrial traditions
- strategic location and good transportation links (A1 motorway, S5 expressway under construction, other national roads network, international airport in Bydgoszcz, well developed railway network)
- wide range of investment offers for investors of various industries
- *greenfield* and *brownfield* investment areas available within Special Economic Zone or Industrial/ Technology Parks
- 23 sub-zones of Pomorska Special Economic Zone cover over 880 ha of its total area
- large number of highly qualified engineers and technical specialists
- lower than national average work cost applies to majority of economy sectors
- strong scientific-research base (numerous tertiary institutions, strong scientific and R&D centres)

- highly attractive for investors Bydgoszcz-Toruń agglomeration, strong sub-regional centres
- efficient agricultural production and well-developed food processing and developing production of high quality organic food
- ecologically pure environment supported by advanced projects in the field of environmental protection
- well-developed social infrastructure (leading medical centres, strong spa base important cultural institutions and efficient education system)
- well developed hotel /conference infrastructure (with over 7 thousand hotel beds available)
- attractive touristic and entertainment offer (including UNESCO's World Heritage List Old Town Complex in Toruń)

Sectors with huge potential

BPO/SSC

Large number of companies in the region (examples):

- NOKIA Networks , Bydgoszcz (IT)
- Atos IT Services, Bydgoszcz (IT)
- Teleplan International, Bydgoszcz (IT)
- Mobica Ltd., Bydgoszcz, (IT)
- Bazy i Systemy Bankowe, Bydgoszcz (IT)
- BPH Centrum Korporacyjne, Bydgoszcz (F&A)
- Centrum Operacyjne Grupa Banku Pocztowego, Bydgoszcz (F&A)
- Centrum Przetwarzania Dokumentów - Centralny Ośrodek Rozliczeniowy Poczta Polska, Bydgoszcz (F&A)
- Grant Thornton, Bydgoszcz (HR, F&A)
- Genesys, Bydgoszcz (IT)
- Asseco, Bydgoszcz (IT)
- SDL Bydgoszcz (IT)
- Sunrise System, Bydgoszcz (IT)
- Centrum Obsługi Biznesu, Bydgoszcz (Call Center)
- Eniro Polska, Bydgoszcz (Call Center)
- Makromedia, Bydgoszcz (Call Center)
- Media System, Bydgoszcz (Call Center)
- Bibby, Bydgoszcz (F&A)
- OpusCapita, Toruń (F&A)
- Grant Thornton, Toruń (HR, F&A)
- Atos IT Services, Toruń (IT)
- Telmon, Toruń (Call Center)
- Contact Centre, Toruń (Call Center)
- Grupa Allegro, Toruń (IT)
- Cyfrowy Polsat, Toruń (Service Center)
- CDTP, Toruń (Call Center)
- Manpower (HR)
- Randstad (HR)

- High potential of investment opportunities in the BPO/SSC sector, thanks to existing or developing infrastructure:
 - existing office space (class A/B+) in Bydgoszcz and Toruń
 - high ratio of available office space in Bydgoszcz and Toruń.
- convenient localisation from the road-railways point of view
- good knowledge of foreign languages among the students in Bydgoszcz and Toruń (i.e. English - 80.4% and German - 40.3%)
- clear presence of Bydgoszcz-Toruń conurbation as a high potential area, in professional BPO sector reports (i.e. by Colliers International in 2009 and 2013) and World's Bank (Bydgoszcz won the *Doing Business in Poland* ranking for 2015)
- activities aimed and public transport facilitation within the conurbation (like: BiT City integrated transport system)
- Financial/Public support instruments for investors for the sector related investments:
 - within Pomeranian Special Economic Zone. The area of Pomeranian Zone in the region covers over 880 ha
 - real estate tax relief
 - co-financing of investments within the Regional Operational Programme
- didactic potential of educational institutions allows realisation of educational programmes in co-operation with BPO sector needs
- high flexibility of private high education establishments in the scope of adjustment of educational programmes to the market needs
- high level of mobility of Bydgoszcz-Toruń conurbation residents
- lower labour costs in the region as a determining factor of attractiveness
- availability of workforce due to relatively high unemployment level, systematically raising level of specialist education of your people, attractive for BPO sector employers
- high development potential for office spaces market
- raising living standards, rich cultural and after work events/activities offer

Electro-mechanical industry

- significant share of this sector companies in the export's structure of the voivodeship (ca. 20%)
- large number of companies representing the sector and its suppliers, partner companies:
 - Apator SA, Toruń,
 - Przedsiębiorstwo Hydrauliki Siłowej HYDROTOR SA Tuchola,
 - PIAP - Ośrodek Badawczo Rozwojowy Urządzeń Sterowania Napędów in Toruń,
 - Pojazdy Szynowe PESA Bydgoszcz SA Holding in Bydgoszcz,
 - Zakład Mechaniczny ZNTK SKRAW-MECH Sp. z o.o. in Bydgoszcz,
 - Z.P-U EKOPARTNER Sp.z o.o. in Bydgoszcz,
 - Unia Sp. z o.o. in Grudziądz
 - TOWIMOR S.A. in Toruń,

- Bydgoskie Zakłady Elektromechaniczne BELMA S.A. in Bydgoszcz,
 - Elektromontaż-Toruń Sp. z o.o. in Toruń,
 - Fabryka Obrabiarek do Drewna FOD Sp. z o.o in Bydgoszcz,
 - FAMOR SA in Bydgoszcz,
 - HYDRO-VACUUM S.A. in Grudziądz,
 - INOFAMA S.A. in Inowrocław,
 - SLICAN Sp. z o. o. in Bydgoszcz,
- scientific facilities on universities with electro-technical faculties: University of Technology and Life Sciences in Bydgoszcz, Nicolaus Copernicus University in Toruń, Kazimierz Wielki University in Bydgoszcz
 - R&D institutes: Regional Innovation Centre in Bydgoszcz, outlets of the Polish Academy of Science
 - a wide range of instruments supporting the development of the sector through incentives for investors: investment exemptions in Bydgoszcz, Toruń and Grudziądz

Chemical Industry

- leading position in the country
- 4th. position in the country in nitrogenous fertilizers production
- 11% out of country's sold production
- over 20% out of the sold production in cellulose-paper industry
- innovativeness of companies operating in the region: large number of patents and protective certificates for usable emblems
- high availability of qualified personnel, attending local universities (chemical faculties at Nicolaus Copernicus University, University of Technology and Life Sciences)
- significant number of large enterprises operating in the sector:
 - Zakłady Azotowe ANWIL S.A.
 - Mondi Świecie S.A,
 - ELANA S.A. in Toruń
 - Soda Polska CIECH S.A.
 - Inowrocławskie Kopalnie Soli SOLINO S.A. Inowrocław (ORLEN Group)
 - KEMIRA Świecie Sp. z o.o. Świecie n/Wisłą
 - Zakłady Chemiczne „NITRO-CHEM” S.A. in Bydgoszcz
 - Indorama Ventures Poland Sp. z o.o. in Włocławek
 - Unilever Polska S.A. in Bydgoszcz
 - Schumacher Packaging Sp. z o.o. in Grudziądz
 - Hanplast Sp. z o.o. in Bydgoszcz
 - Rhodia Polyamide Polska (Group Solvay) in Włocławek
 - Boryszew Tensho Poland Sp. z o.o.
- average remuneration in the chemical sector is lower than country's average
- scientific facilities: Instytut Inżynierii Materiałów Polimerowych i Barwników in Toruń

Food processing

- leading role of the voivodeship in the farming and food production sectors
- one of the leading food products providers in Poland
- leading sugar producer
- leading ripe oil supplier (19.7% of country's sold production)
- well received food brands from our region: i.e. Kruszwica (consumable oils), ginger cakes of Toruń (Kopernik factory), *Wisielki* and *Sofijki* of Grudziądz, SOWA pralines of Bydgoszcz
- scientific facilities of the voivodeship: University of Technology and Life Sciences in Bydgoszcz, Nicolaus Copernicus University in Toruń, Kazimierz Wielki University in Bydgoszcz
- well developed network of food processing companies (examples):
 - Krajowa Spółka Cukrowa S.A., Toruń
 - Nordzucker S.A- Zakład Produkcyjny Chełmża
 - CEREAL PARTNERS POLAND TORUŃ-PACIFIC Sp. z o. o.
 - Delecta S.A. (within the Orkla Group of Norway), Włocławek
 - CYKORIA S.A. Wierzchosławice
 - FROSTA Sp. z o.o. in Bydgoszcz
 - Fabryka Cukiernicza "Kopernik" S.A. w Toruniu
 - JUTRZENKA Colian Sp. z o.o., Bydgoszcz
 - Zakłady Tłuszczowe KRUSZWICA S.A. Kruszwica,
 - Masmal Dairy Sp. z o.o. in Grudziądz
 - Zakład Produkcji Cukierniczej „Wisła” in Grudziądz
 - Ocetix Sp. z o.o. in Grudziądz
 - Drobex Sp. z o.o., Solec Kujawski
 - Abramczyk Sp. z o.o.
 - Zakłady Mięsne Nove
 - Spółdzielnia Mleczarska Rotr, Rypin
 - Proszkownia Mleka Sp. z o.o., Piotrków Kujawski
 - Cargill Poland Sp. z o.o.,
 - Stovit Group Sp. z o.o., Bydgoszcz
 - Gzella Poland Sp. z o.o.
 - Zakłady Mięsne Viando Sp. z o.o., Radojewice near Inowrocław
 - Bonduelle Polska SA, Gniewkowo
 - Pepsi Cola General Bottlers Sp. z o.o., Żnin

Automotive

- Boryszew Tensho Poland Sp. Z o.o.
- BAUS AT Sp. z o.o.
- WAS Wietmarscher Polska Sp. z o.o.
- Kongsberg Automotive

Economic Potential

Estimation of Gross Domestic Product in 2015

	in mln PLN	in %	of national average
Poland	1 798 302	100	100 (46 764)
Kujawsko-Pomorskie	79 629	4.4	81.6 % (38 142)

Source: Central Statistical Office,; *GDP.Regional Accounts Estimation 2015. Warszawa 30.12.2016*

Gross Value Added by kind of activity in 2014

(data for 2015 will be released in October 2017)

	Total (in mln PLN)	Agriculture, hunting and forestry; fishing (in mln PLN)	Industry (in mln PLN)	Constru- ction (in mln PLN)	Trade and repair; transport, storage (in mln PLN)	Financial and insurance. Real estate activities (in mln PLN)	Other services (in mln PLN)
Poland	1 719 097	43 401	404 765	119 197	435 997	145 076	376 809
Kujawsko-Pomorskie	76 022	3006	19 321	5 311	18 002	4 391	16 416

Source: Central Statistical Office, *GDP.Regional Accounts 2014. Katowice 2016*

Average monthly gross wages and salaries (PLN) in I Q of 2017 (enterprise sector)

Poland	4 390.54
Kujawsko- Pomorskie	3 851.35

Source: Central Statistical Office, *Statistical Bulletin of Kujawsko-Pomorskie Voivodeship for the 1st Q of 2017*

Local job market

Economic activity of the population aged 15 and more in I Q of 2017

	Economically active persons (in thous.)	Activity rate (%)	Registered unemployment rate (%)
Poland	17 208	56.2	8.1
Kujawsko- Pomorskie	921	55.3	11.9

Source: Central Statistical Office, *Statistical Bulletin of Kujawsko-Pomorskie Voivodeship for the 1st Q of 2017*

Registered unemployed persons by educational level (in thous.) in I Q of 2017

	Total	Tertiary	Vocational	General	Basic vocational	Lower secondary, primary and incomplete primary
Kujawsko-Pomorskie	98 711	8 590	18 914	9 886	28 815	32 506

Source: Central Statistical Office, *Statistical Bulletin of Kujawsko-Pomorskie Voivodeship for the 1st Q of 2017*

Registered unemployed persons (in thous.) by age in I Q of 2017

	Total	25 years and less	25-34	35-44	45-54	55 years and more
Kujawsko-Pomorskie	98 711	13 822	27 742	22 739	17 989	16 419

Source: Central Statistical Office, *Statistical Bulletin of Kujawsko-Pomorskie Voivodeship for the 1st Q of 2017*

Higher education institutions including non-public higher education institutions**Higher education institutions in 2016/2017**

	Tertiary schools		Students
		Non-public schools	
Poland	390	258	1 348 822
Kujawsko-Pomorskie	28	22	61 859

Sources: Central Statistical Office, *Statistical yearbook for kujawsko-pomorskie voivodeship 2016*, Bydgoszcz, December 2016

Central Statistical Office, *Statistical yearbook for Poland 2017*, Warszawa, June 2017

Selected higher education institutions**Nicolaus Copernicus University (NCU) in Toruń**

selected faculties: physics, chemistry, biology, IT, humanities including philologies

Collegium Medicum of NCU in Bydgoszcz

selected faculties: medicine, biotechnology, pharmacy, cosmetology

University of Technology and Life Sciences in Bydgoszcz

selected faculties: environment protection, electronics and telecommunication

Kazimierz Wielki University in Bydgoszcz

selected faculties: information technology, pedagogy, political sciences

Feliks Nowowiejski Academy of Music in Bydgoszcz**Vocational High School (PWSZ) in Włocławek**

selected faculties: information technology, pedagogy, philologies

Selected investors from our region

Company	Sector	Location
Grupa Anwil	chemicals	Włocławek
Pojazdy Szynowe PESA Bydgoszcz SA Holding	engineering industry	Bydgoszcz
Apator, GK	electro-technical industry	Ostaszewo near Toruń
Mondi Świecie	paper & cellulose	Świecie
Solvay Advanced Silica	chemicals	Włocławek
Cereal Partners Toruń-Pacific	food processing	Toruń
Plastica Sp. z o.o. (TZMO SA Group)	Chemicals and plastics	Frydrychowo near Kowalewo Pomorskie
NOKIA Networks	BPO (IT)	Bydgoszcz
Atos IT Services	BPO (IT)	Bydgoszcz
Opus Capita	BPO (F&A)	Toruń
Lafarge	Cement factory	Barcin
Zakłady Tłuszczowe KRUSZWICA SA	Food processing	Kruszwica
Krajowa Spółka Cukrowa SA	Sugar industry	Toruń

Useful addresses

Kujawsko-Pomorskie Marshal's Office (Urząd Marszałkowski Województwa Kujawsko-Pomorskiego)

Plac Teatralny 2
87-100 Toruń
Tel: (+48 56) 62 18 600
Fax: (+48 56) 62 18 553
www.kujawsko-pomorskie.pl

Kujawsko-Pomorskie Voivode's Office (Kujawsko-Pomorski Urząd Wojewódzki)

ul. Jagiellońska 3
85-950 Bydgoszcz
Tel: (+48 52) 349 79 13
Fax: (+48 52) 349 74 60
www.bydgoszcz.uw.gov.pl

Update: Marek Ryłow COI WK-P, July 2017