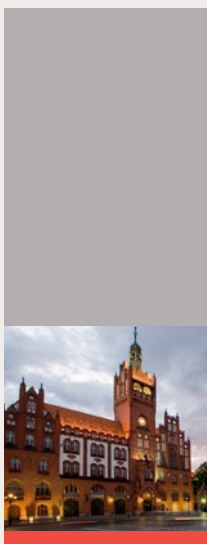
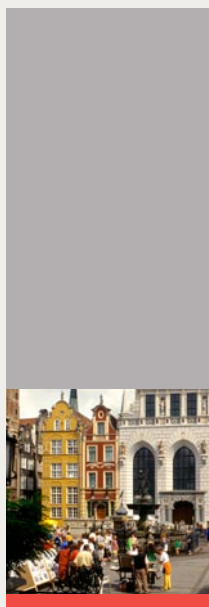




Invest
in Pomerania



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 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 PricewaterhouseCoopers 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.

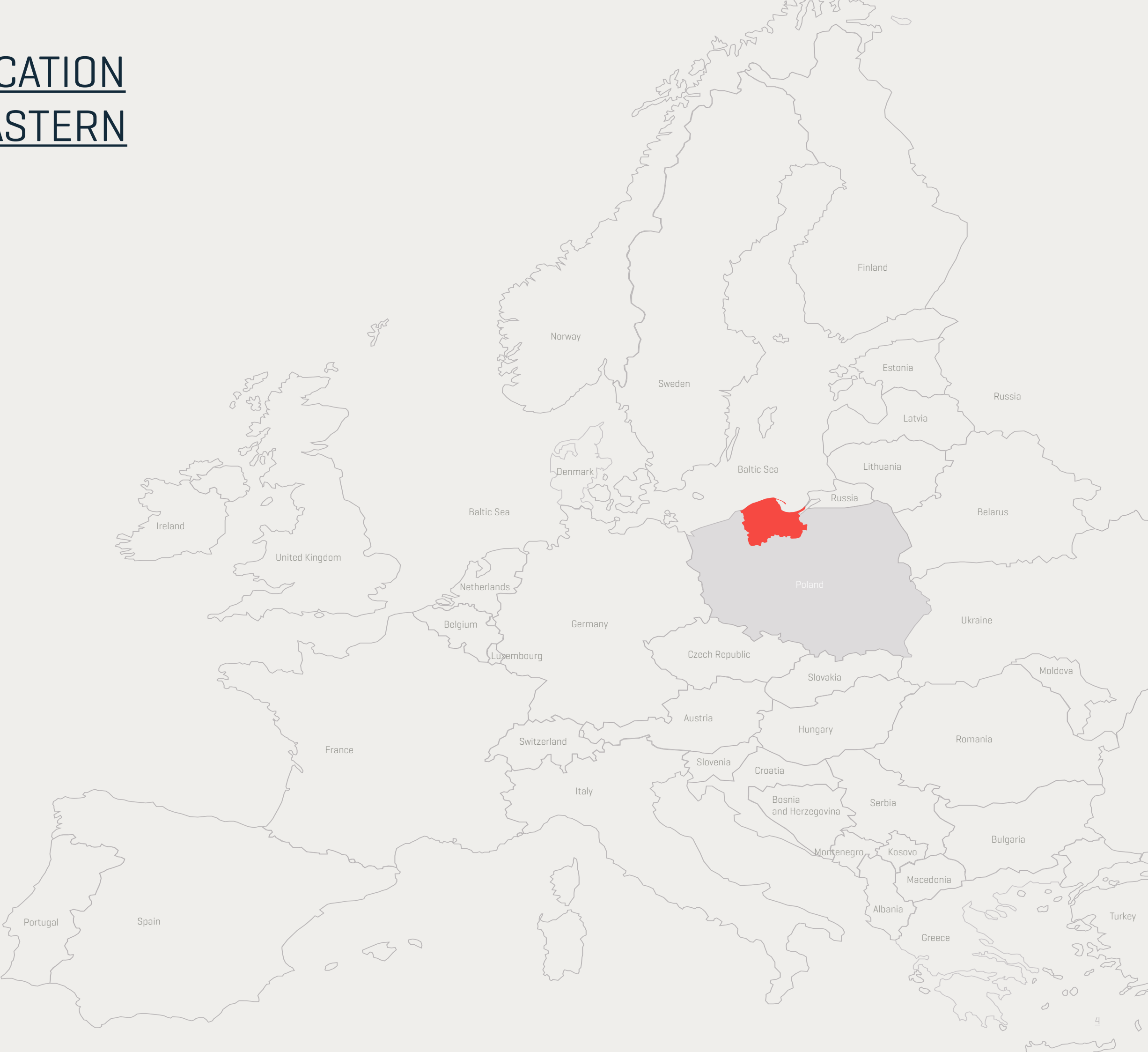
What is the regional recipe for success? It is a result of many factors, such as:

- 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



POMERANIAN REGION IN FIGURES

Population *	2.23 mln	
Area *	18 300 km ²	
Largest business centre	Tri-City [Gdansk, Gdynia, Sopot]	
Number of enterprises [Q2 2011] *	in total: 257.4 thousand	with foreign capital: 2 745
Cargo turnover in seaports in 2010 *	42 million of tons	
Lech Walesa International Airport Gdansk **	Number of regular connections: 44	
	Number of connections to Scandinavia [weekly]: 82	
	Number of airlines: 10	
	Number of served passengers in 2010: 2.29 million	
R&D centres	18 [more than 1 500 employees]	
Average remuneration [gross] Q1 2011 *	PLN 3 469.66 [EUR 867]	
Number of students in 2010 *	107 269	
Number of students [catchment area] *	224 737	
Population growth rate in 2010 *	First place in Poland	
Life attractiveness ***	First place in Poland	

* Central Statistical Office [CSO]
** Data Airport, 04.2011
*** "Social Diagnosis 2011", Ranking of Przekroj magazine of 2011

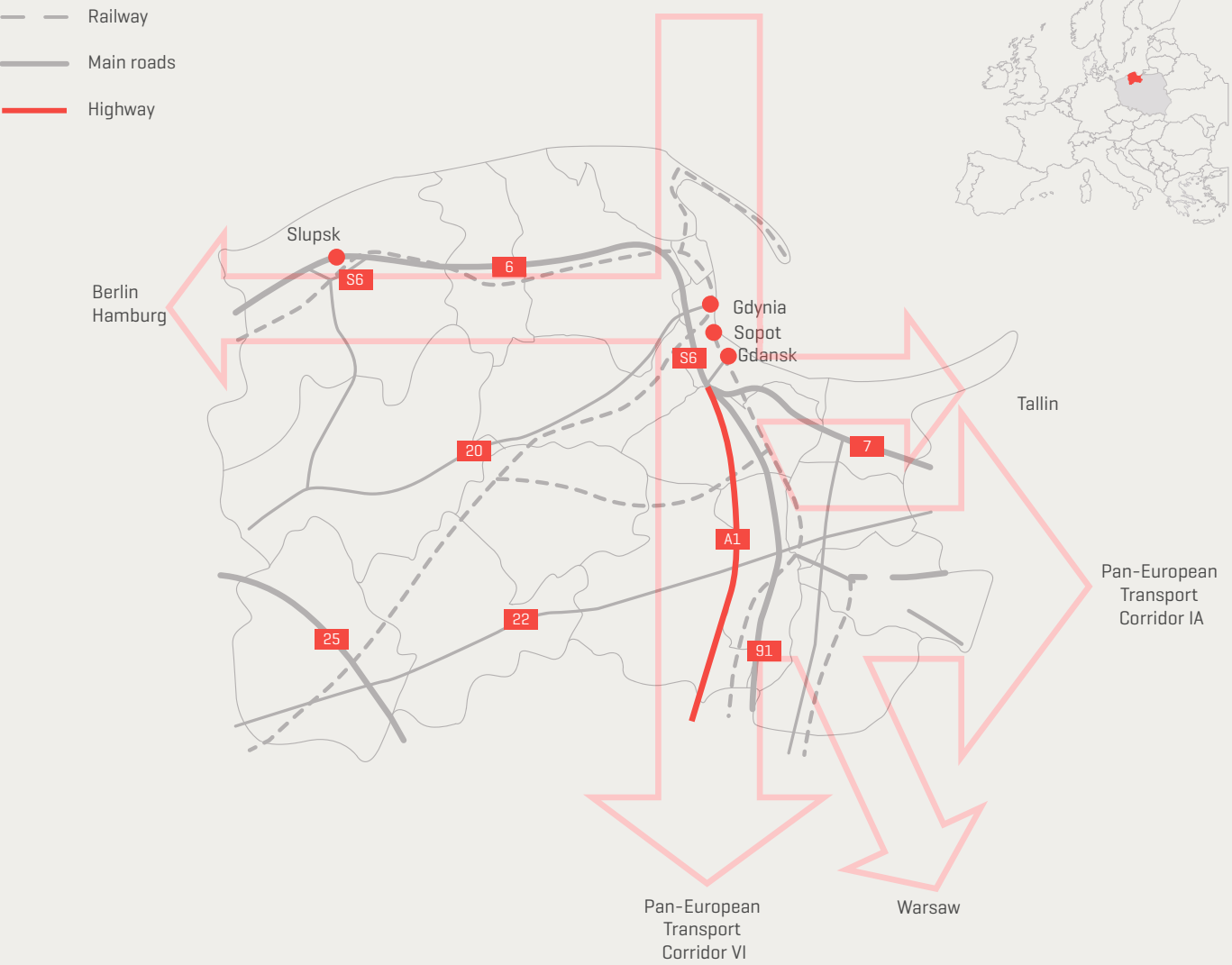
POMERANIAN REGION – A GATEWAY TO THE WORLD

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 investments are a result of the inflow of European Union funds as well as preparations of Poland to co-organise the UEFA 2012 football championship. 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 3 500 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. The service is handled by the largest vessels in the world, with a capacity up to 15 500 TEU [20-foot containers].

The Port of Gdansk Authority, along with a Belgian transhipment operator Sea Invest and a global steel giant Arcelor Mittal, will build by September 2012, for more than EUR 40 million, a coal transhipment base, which will also facilitate transhipments of iron ore and aggregates.

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.



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 is aiming at dredging of the Port Channel to -13.5 m, which will allow 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.



Source: Gdansk Lech Walesa Airport, June 2011.

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

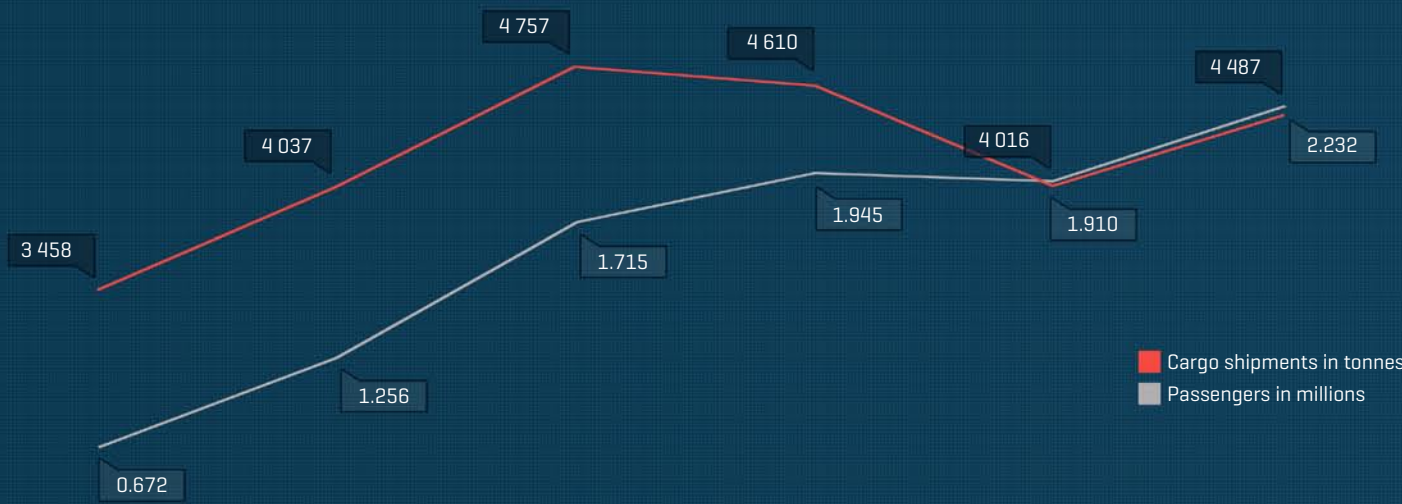
	Gdansk	Wroclaw	Cracow	Lodz	Katowice	Poznan
Aarhus	✓					
Bergen	✓		✓			
Copenhagen	✓	✓	✓			✓
Gothenburg	✓					
Helsinki	✓		✓			
Malmö Sturup	✓				✓	
Oslo	✓		✓			
Oslo - Rygge	✓	✓	✓			
Oslo - Torp	✓				✓	✓
Stavanger	✓		✓			
Stockholm-Skavsta	✓		✓		✓	✓
Turku	✓					

* for August 2011

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.

Gdynia, along with the Kosakowo district, is planning to open a second airport in the region – Gdynia Kosakowo Airport.

PASSENGERS AND CARGO SHIPMENTS AT THE AIRPORT IN GDANSK IN 2005-2010



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

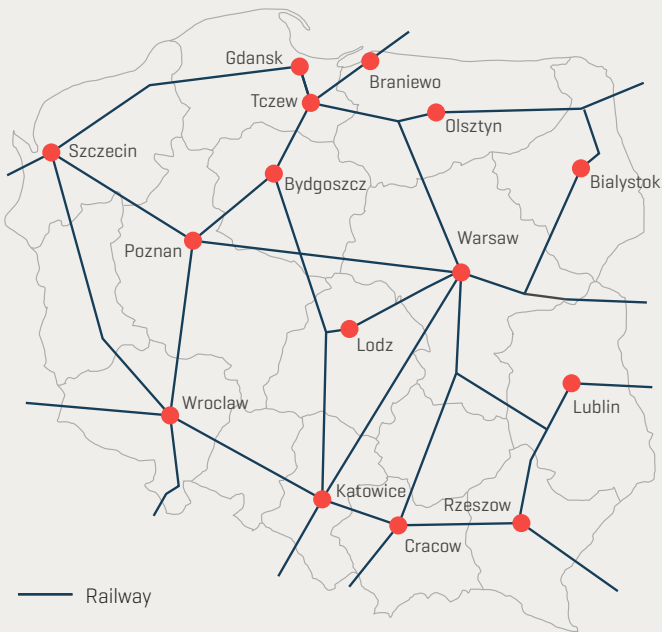
from Gdansk via Tczew, Braniewo to Kaliningrad

from Gdansk via Szczecin to Berlin

From 2012 onwards, connections between Gdynia and Warsaw and further to Cracow will be served by state-of-the-art Pendolino trains which will attain an average speed of 200km/h on this route.

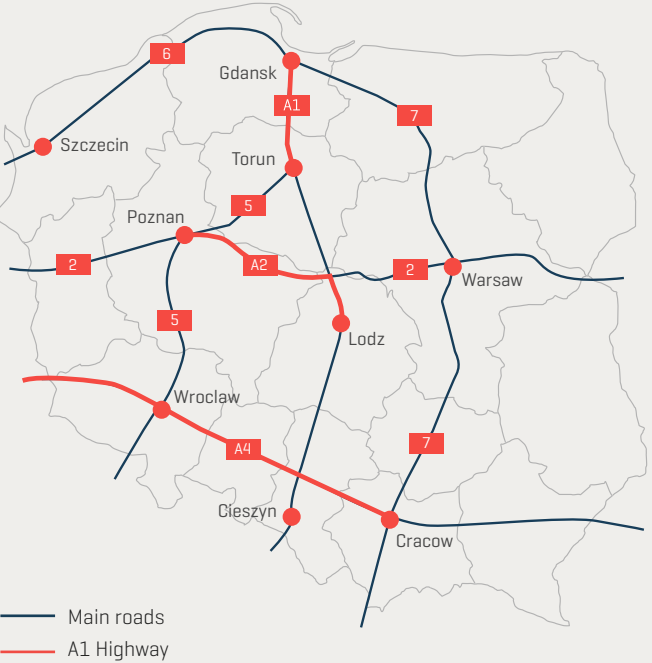
In the near future, investments will be completed which shall additionally facilitate transportation within the region: Pomeranian Metropolitan Railways, Hel Corridor, and the Koscierski corridor.

RAILWAY CONNECTIONS IN POLAND

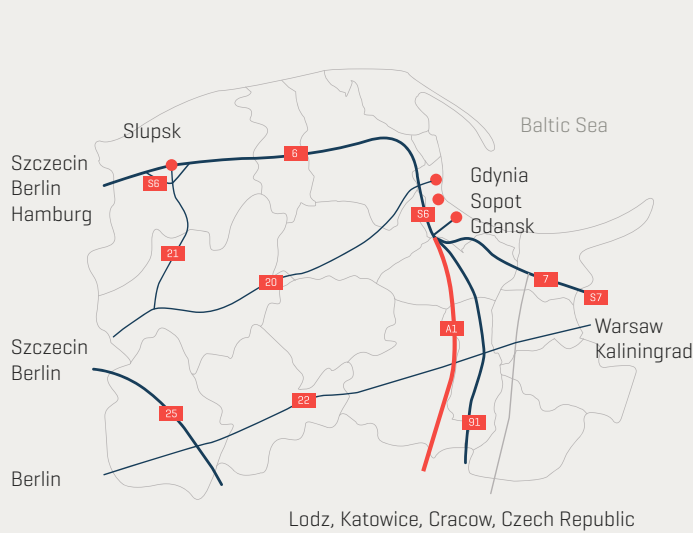


ROADS

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. The highest population growth rate in Poland has been recorded recently in the Pomeranian region. (Central Statistical Office) "Demographic Yearly" 2010).

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 1 442 598

Number of people professionally active 917 000

Unemployed 98 280

Unemployment rate in Pomeranian Region 11.5 %

GEOBAN S.A.



Radosław Krasowski
RADOSLAW 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 Poviatt 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 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 more than 107 000 students. In 2010, 23 000 students graduated from Pomeranian universities. (CSO, 2010)

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

UNIVERSITY	NUMBER OF STUDENTS *
University of Gdansk	28 109
Gdansk University of Technology	22 819
Gdynia Maritime University	6 743
Pomeranian University in Slupsk	5 568
Medical University of Gdansk	5 192
Naval University of Gdynia	3 971

* CSO, 2010

MAIN SUBJECTS STUDIED IN 2010

Subject	Students	Graduates
architecture and construction	4 686	571
biological sciences	1 714	494
economics and administration	25 506	6 083
engineering and technology	11 850	1 350
environment protection	1 536	199
IT	4 334	616
journalism and information	654	93
law	2 863	410
manufacturing and processing	1 313	152
maths and statistics	1 371	253
medicine	7 447	1 309
pedagogy	12 090	4 484
physics	2 805	631
population services	6 166	1 795
protect and security	795	0 *
social sciences	12 207	3 445
social welfare	237	45
transport services	1 770	233

* a newly opened major

Source: Local Data Bank of Central Statistical Office

LUFTHANSA SYSTEMS POLAND SP Z O.O.



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.

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



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 67% 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 1.2 million people.

The largest cities and district capitals [inhabitants in thousands]

Source: Census Offices in selected towns and cities, August/September 2011



Aside from the Tri-City Metropolis, there are also many districts and cities in the region that are attractive in terms of investments. Slupsk, Tczew or Kwidzyn may serve as examples here. Such companies as Scania, E.ON Sverige, Gino Rossi, Curver, Flextronics International, Eaton Trucks, Gemalto, Molex, 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 Gdański 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
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 the last year, 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 Rika), 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 SUUS Logistics ■ Europol ■ Grain ■ Segro ■ Schenker DB ■ Gefco Wincanton
Raben ■ Poczta Polska ■ Cargoforte ■ Dachser ■ Kuehne&Nagel ■ Panalpina

DCT GDANSK



BORIS WENZEL
Chief Executive Officer DCT Gdańsk S.A.

Container terminal DCT Gdańsk was built in 2007. From that moment DCT grew to company that employs 400 people. **We are located in Gdańsk mostly because of its natural conditions to develop deep sea terminal. Gdańsk and whole Tri-City is well connected with the rest of Poland and Central-Eastern Europe.** A lot of infrastructure has been built recently and is building now. Being the part of European Union, Poland offers a lot of solutions already proven in Western Europe countries.

For us, as a company that cooperates with foreign firms, Gdańsk is located perfectly also because it offers a great number of well skilled people fluent in foreign languages. We employ mostly young people – our personnel are very ambitious and have a great potential. We cooperate with Universities in Tri-City because this way we receive well-educated staff prepared to work in maritime industry.



There are four container terminals operating in Tri-City in total. Aside from DCT Gdańsk, there is also Gdańsk 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 Gdańsk and Sucharskiego Route, an area of 110 hectares was leased by Goodman Poland. The investor will perform infrastructural and warehouse investments within the Pomeranian Logistic Centre. 500 000 m² of warehousing, production and office space will come into being.

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 2005-2010 [IN TONNES]



Port in Gdynia is also investing in creation of new connections within the motorways of the sea. To this extent port authorities conduct a construction of new and reconstruction of existing quays, which will enable to increase the container handling capacity. The project includes construction of a new maneuvering area, a parking quay and the Chylonka river estuary.

The network of air connections with the main European airports is also of importance for the development of the logistics industry. These airports include: Frankfurt, Rome, Munich, Copenhagen and Helsinki.

Also 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 2010, nearly 39 000 students studied subjects related to the TSL industry. The University of Gdańsk, Gdańsk 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 Gdańsk

Port Gdynia

Airport of Gdańsk

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.



SSC&BPO SECTOR

Tri-City is the main hub of development of shared services centres in the Pomeranian region. More than 30 state-of-the-art business service centres operate here and employ approx. 11 000 employees. The vast majority of these centres specialise in IT services (ITO centres) and financial processes. What distinguishes Tri-City on the map of the Polish SCC & BPO sector is a distinctively stronger position in employment at research and development centres. There are presently approx. 1 500 persons 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. Qualifications and skills of Pomeranian employees allowed to establish first centers of knowledge - based services (KPO – Knowledge Process Outsourcing) and centers of excellence (i.e. Thomson Reuters).

A distinctive feature of the region is a large number of students fluent in foreign languages less popular in Poland, for example Scandinavian ones.

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

The ever growing importance of Tri-City in the sector of advanced business services outsourcing is evidenced by dynamic employment growth in the sector. In 2008-2010, employment here increased by more than 2 000 people (more than 20%) and it is still growing.

They have already trusted us:

Sony Pictures ■ First Data ■ Geoban ■ Acxiom ■ Arla Foods ■ Thomson Reuters ■ Bank BPH/GE Capital ■ Transcom ■ PZU ■ Nordea Bank Willis ■ BEST ■ HK Finance & Accounting ■ Masterlease ■ Meritum Bank ■ Contact Center ■ Hempel

START PEOPLE SP. Z O.O.



ANNA BRZEZIŃSKA
Project Management
Start People

Due to highly developed infrastructure and a specialised resource base of available specialists, Tri-City cannot belong to the cheapest locations – but nor is it an expensive one. Despite much better developed infrastructure, the remuneration level in Tri-City is at a similar level as in cities with poorer transportation. **It is why entrepreneurs perceive Tri-City as a golden mean of its kind among Polish investment locations from the BPO/SSC sector.** Employees who know that their wages are relevant to the qualifications they have are of similar opinion, which results in loyalty and higher quality of work they perform.



ARLA FOODS



ARNE SØRENSEN
Director, Member of ABSL, Poland

Arla Global Financial Service Centre was successfully set up in the Tri-City three years ago. We are extremely pleased with our location, where we benefit from great office facilities and access to highly skilled personnel. **It was surprisingly easy to find people with both Danish and Swedish language skills!** We started out with 120 employees and after a period of stabilizing our activities we are now prepared for expansion.



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 1 200 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.

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, Norway and Icelandic programs. A Finnish program will start in the future. Also the offer of language studies at the University of Gdansk is to be extended by Chinese.

The cooperation of Pomeranian universities with investors present in the region is conducive to the dynamic development of the SCC & 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 327 000 m² of state-of-the-art offices, of which approx. 10.2% are non-rented), 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:	327 090 m ²
Ratio of unoccupied offices:	10.2 %
Office area under construction:	31 500 m ²
Rent rates:	12-14.5 EUR/m ²

FOREIGN LANGUAGES AVAILABILITY

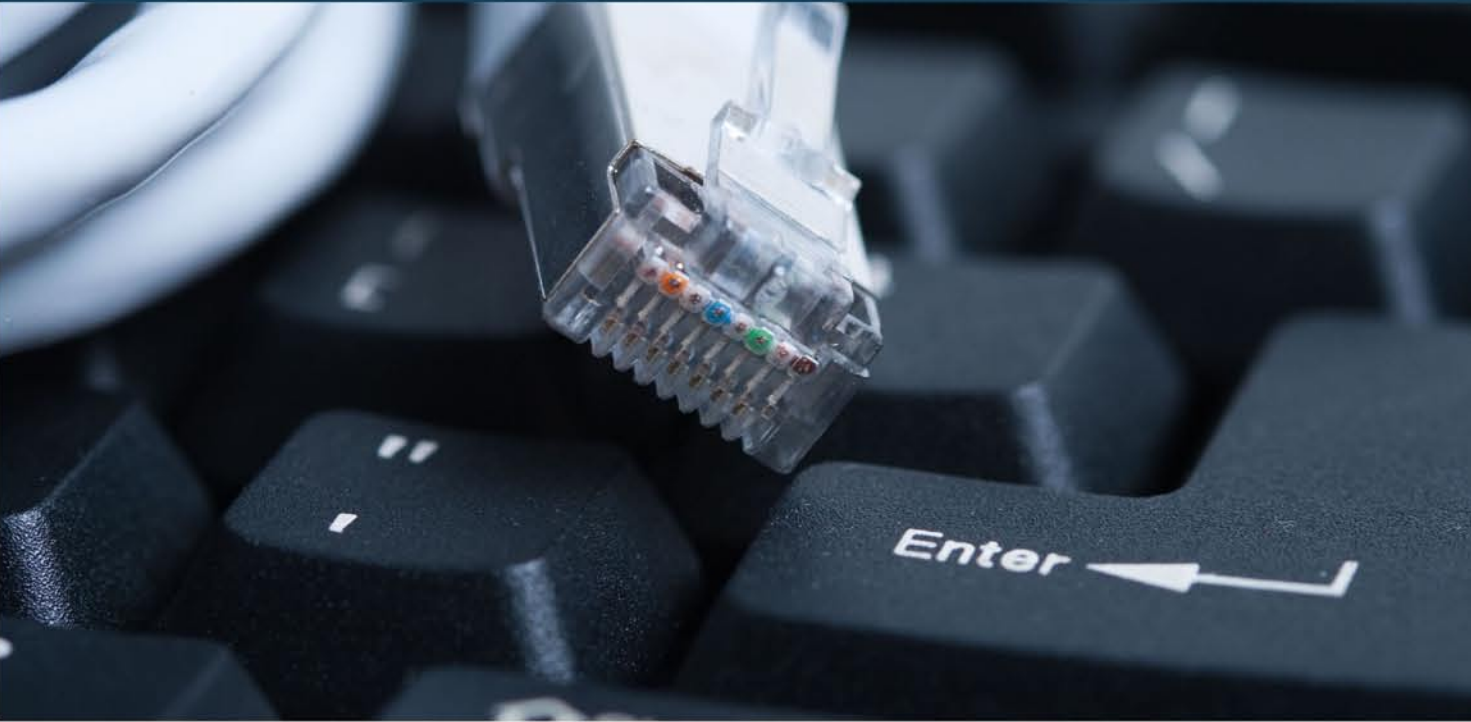
English	✓	Danish	✓	Romanian	✓
German	✓	Italian	✓	Serbian	✓
Spanish	✓	Portuguese	✓	Croatian	✓
French	✓	Slovak	✓	Bosnian	✓
Russian	✓	Czech	✓	Arabic	✓
Norway	✓	Ukrainian	✓	Urdu	✓
Swedish	✓	Japanese	✓	Hindi	✓
Finnish	✓	China	✓		

ICT

The Pomeranian region is presently the most dynamically developing region in the ICT sector. 4 000 companies from this sector operate here today, employing 20 000 people. The ICT sector in Pomerania generates more than 1/6 of the region's export value (approx. PLN 4.1 billion). 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 ■ Jeppesen by Boeing ■ Kainos
Lufthansa Systems ■ Multimedia Polska ■ Ncomputing ■ Nevion
Playsoft ■ Relacom ■ Sofrel ■ Synopsys ■ Implix ■ Asseco
UTC Fire & Security ■ Speednet ■ Goyello ■ SII ■ Zensar Technologies



IBM



MARCIN MATACZ
Leader Regional Capability
Center, 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.



108 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 2010, nearly 2 700 graduates of technical colleges were awarded professional licences. The unquestionable majority of the licences issued - as many as 1 462 - was for the profession of IT technician.

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

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 largest one in Europe and second in terms of size globally, and it operates successfully. Intel Technology Poland employs more than 700 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, 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.

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

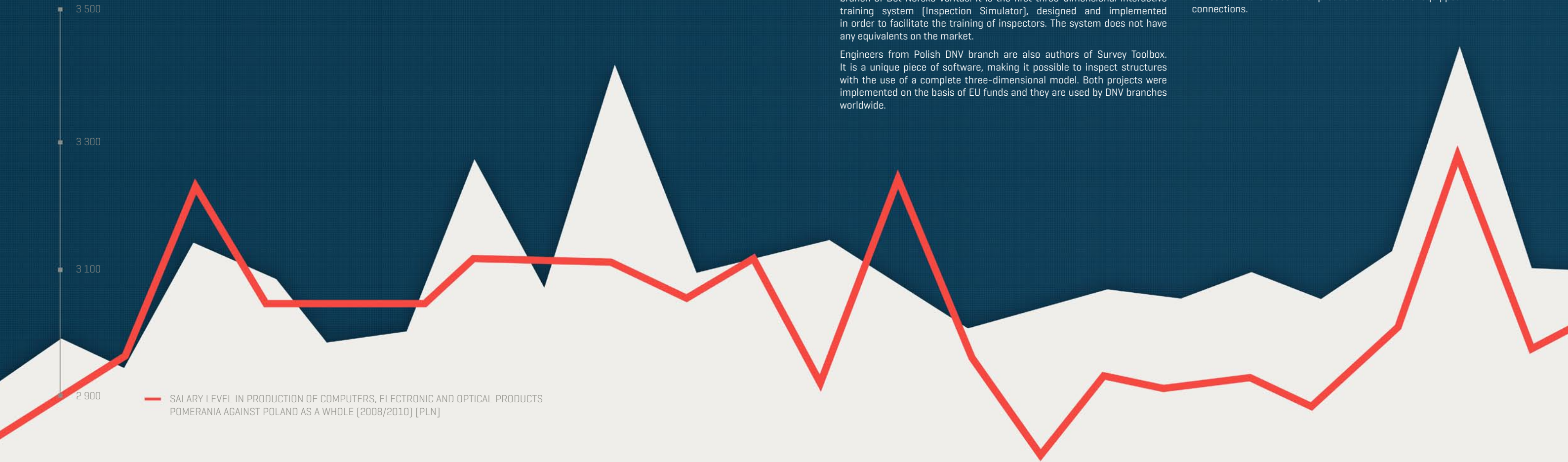
Azo Digital Sp. z o.o. is a Polish company that created an electronic flashing unit for lamps used in street lighting. This unique product consumes up to 50% less power and adjusts the intensity of emitted light to ambient conditions. Azo Digital also managed to eliminate the resonance that street lamps 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 Pomeranian ICT cluster unites more than 100 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.

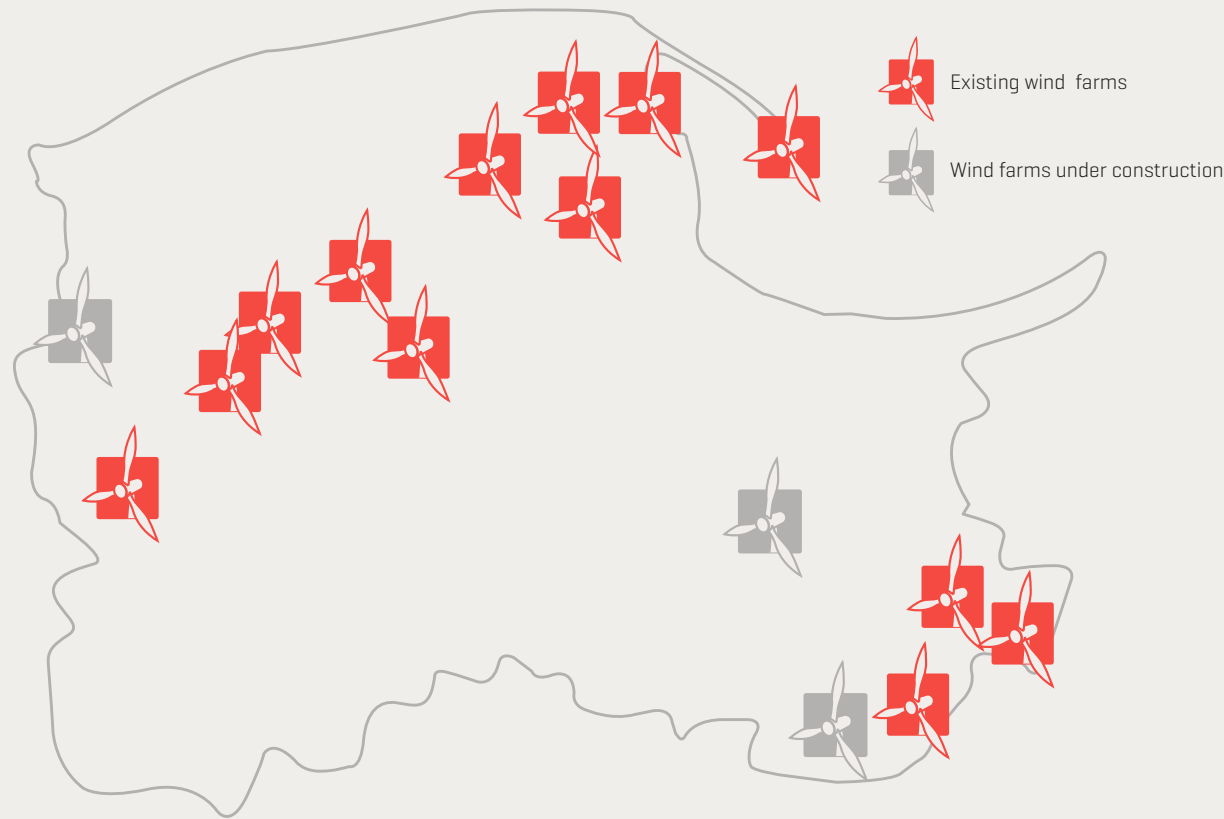
LARGEST POTENTIAL FOR INVESTMENTS IN WIND ENERGY IN POLAND

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%. In 2010, 141 MW of wind farms were installed in the Pomeranian region, which gave us fourth place in Poland in this regard.

They have already trusted us:

EDF - Elektrociepłownię Wybrzeże ■ AES Wind Generation Gamesa Wind Poland ■ Mitsui IJ-Power ■ Greentech Energy Systems Taiga Mistral I Poldanor ■ Jabil Circuit Poland ■ GSG Towers Det Norske Veritas Poland ■ Green Power Polska (GPP) Iberdrola Energia Odnawialna ■ Eco-Energy I Eólica Postolin Fersa Energia Renovables ■ Rockfin

SITUATION OF WIND FARMS IN POMERANIA



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, port 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 Peplina 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.



Also the offshore wind power industry has extraordinary economic potential in the region. By 2030, there is a possibility of installing sea wind farms in an area of at least 2 000 km² with a total capacity of approx. 5 000 MW. [PTEW].

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.

POMERANIA – ANOTHER QATAR?

According to reports by BNK-Petroleums, a company holding a license for natural gas prospecting in the region, Pomerania has the largest resources of shale gas in Poland. Deposits of this resource may be located even on the three fourths of the Pomeranian region area.

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 POSSIBILITIES – PRODUCTION OF MACHINES FOR THE RENEWABLE ENERGY INDUSTRY AND NUCLEAR POWER INDUSTRY

The region has potential for the development of RES equipment, as well as the assembly of components for the sector. The production of cast and steel elements has the best chance of success. An example of such production is the construction of wind towers in Stocznia Gdansk S.A.

Big development opportunities in the region may also be linked with the construction of accompanying structures for vessels handling the assembly of wind turbines at sea, as well as with the construction of components for nuclear energy.

HUMAN RESOURCES IN THE POWER INDUSTRY

In the academic year 2009/2010, more than 9 800 students were educated at Pomeranian universities with majors related to the energy sector. More than 1 297 of them graduated.

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

Supplementary master degree studies: The fuel and power sector in the global economy is also a major at the Academy of Law and Diplomacy.

EXTENDED SCIENTIFIC AND RESEARCH BACK-UP AND THE INSTITUTIONAL ENVIRONMENT OF THE POWER SECTOR

Institutions that operate in the region offer exceptional support for investments in the power industry on the national level. The broadest activities are conducted by PAS Institute of Fluid-Flow Machinery [IFM] which carries out a number of projects in cooperation with businesses.

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 Szewalski PAS Institute of Fluid-Flow Machinery in Gdansk;
- The Innovative Power Technologies and Integration of Renewable Energy Sources Laboratory LINTE^2 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 16% of all investments in the light chemical industry sector in Central-Eastern Europe flowed in 2003-2011 to Poland. With 106 investment projects, Poland was overtaken in this regard only by Russia [157 projects]

They have already trusted us:

Polpharma ■ Synexus ■ EURx ■ A&A Biotechnology ■ Invicta ■ Blirt Prochimia Surfaces ■ Synevo ■ Ziaja ■ Oceanic

FDI INFLOWS IN CEE [2003-2011] * Source: FDImarkets.com.

	Number of projects	Investment values [USD billion]	Number of workplaces
Russia	157	6.3	21 283
Poland	106	2.7	8 571
Romania	53	0.9	4 006
Czech Republic	50	1.0	2 908
CEE in total	654	17.3	55 420

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, Gdansk Medical University and Gdansk University of Technology. In total, approx. 9 000 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. There is construction currently underway of new biology and chemistry faculty buildings under the “Baltic Campus of the University of Gdansk” project. In total, in the three buildings with an area of more than 50 000 m², there will be 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.

AVAILABILITY OF QUALIFIED STAFF IN POLAND AND CEE IN 2009 [IN THOUSANDS] Source: Eurostat

	Population of scientists	Employed in the sector of economy based on knowledge	Mobility scientists *	IESCD 1997 - level 6 Students	Graduates
Bulgaria	1 300	832	36	4 353	601
Croatia	632	425	16	3 052	494
Czech Republic	2 184	1 416	78	24 340	2 382
Estonia	358	183	15	-	161
Hungary	1 673	1 255	49	7 153	1 141
Latvia	502	286	23	1 982	139
Lithuania	753	433	42	2 855	369
Macedonia	238	-	-	159	87
Poland	6 584	4 380	305	31 814	5 616
Romania	2 477	1 744	54	28 593	3 271
Slovakia	950	686	27	10 674	1 655

* 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 Eastern Europe. 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 2010, 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 transhipment 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

Cars production



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. Each year, 800 buses leave the Scania plant, which gives the Swedish corporation the fourth position in Poland.

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 June 2006, a new production plant was launched, which is still being extended. The company produces approx. 250 buses yearly.

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 [8th 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 best refinery of the Central Eastern Europe 2008 (according to the World Refining Association),

belongs to the group of the best power companies from all over the world in “Top 250 Global Energy Company” (according to Platts and Standard & Poor’s),

in 2010, LOTOS S.A. Group finished the 10+ Programme, thanks to which the refinery in Gdansk increased its petroleum processing capacity from 6 to 10.5 million tonnes yearly. [The group received the title “European Petrochemicals Deal of the Year 2008” awarded by the prestigious periodical, “Project Finance Magazine” and the title of “Oil Deal of the Year awarded by “Project Finance International”].

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



Sunreef Yachts

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 10 000 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 40 000 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
Site Director ,
President of Rolls-Royce Marine Poland Sp. z o.o.



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 produces 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 dominates the market in terms of diversity of products and volume of revenues [PLN 447.7m in 2009]. Just behind it are Wilbo S.A. and Morpol 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 has more than 300 000 m² of state-of-the-art office area which is a 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, Q2 2011

Supply of office space	327 090 m²
Vacancy rate	10.2 %
Planned completion in 2011	31 500 m²
Planned completion in 2012	43 700 m²
Planned completion in 2013	51 200 m²
Base rents in prime locations [EUR/m²/month]	12-14.5

SUPPLY OF OFFICE SPACE IN THE LARGEST CITIES IN POLAND

Warsaw	3 505 129 m²
Cracow	480 597 m²
Wroclaw	369 176 m²
Tri-City	327 090 m²
Katowice	250 197 m²
Poznan	237 287 m²
Lodz	210 198 m²

Up to the end of 2011, developers plan to deliver approx. 31 500 m² of state-of-the-art office space. The coming years are shaping up equally well, which is indicated for example by investors’ assessments of Gdansk and the whole Tri-City.

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 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 [Czluchowski district] was commissioned.

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

- Gdansk Entrepreneurship Incubator “STARTER” (end of construction work in 2011)
- Kwidzyn Industry and Technology Park [KPPT] (2012)
- Slupsk Technology Incubator [SIT] (2012)
- Baltic Industrial Park – a state-of-the-art industry and business centre in Gdynia on former post-shipyard areas (2013)

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.



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. Pomeranian cities lead in rankings related to places friendly to live in Poland.

The Pomerania inhabitants belong to the most satisfied ones in Poland in terms of place of living. [Source: Social Diagnosis 2011, ranking of Przekroj magazine 2011].

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
Chief Executive Officer,
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 kite surfers 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 will be played in Pomerania. Thus, an intense preparatory works are conducted in whole Tri-City. The hotel and communication infrastructure is expanded in the city. Also a second terminal is constructed at the airport. The total cost of preparations for EURO 2012 is estimated at 3 billion euros.

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 2010 was for the second time in a row awarded with the European Festival Award in the "Best Big Festival in Europe" category. The most prominent event of Polish cinematography, namely the Polish Film Festival, also takes place in Gdynia. Gdansk attracts admirers of theatre and Shakespeare thanks to the annual international Shakespeare Festival. 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

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 [August 2011 r.]

Rental rates

Studio – 250 EUR

One-bedroom – 350 EUR

Two-bedroom – 425 EUR

Purchase price of housing – 1 500 EUR / sq. m

For foreigners coming with families there is also an education offer ensuring education in foreign languages, both at kindergarten, as well as secondary school level. Children are ensured care and learning in comfortable and modern establishments. 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 Kindergartens and Primary School no. 13 operating within the Association of French People Abroad operate in Gdynia.

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
The United States	Multimedia Polska	ICT
The Netherlands		
The Netherlands	Smurfit Kappa Polska	Paper packaging production
	Curver Polska	Plastic production
Sweden	Nordea Bank Polska	Banking
	Scania Production Słupsk	Automotive
	Relacom	ICT
	Skanska	Construction
Denmark	Jysk	Commerce
	Prime Food	Food industry
	Arla	Accounting and finance
The United States	International Paper - Kwidzyn Sp. z o.o.	Paper production
	Jabil Circuit Polska	Electronics
	Jabil Assembly Polska	Electronics
	Flextronics International Polska	Electronics
	Eaton	Automotive
	Delphi Polska	Automotive
	Thomson Reuters	Analytic services
	Compuware	ICT

COUNTRY	ENTERPRISE	SECTOR
The United States	Intel Technology Poland	ICT
	IBM	ICT
	Acxiom	ICT
	First Data	Accounting and finance
	ProLogis	Real estate
	Panattoni	Real estate
	Coca Cola	Food industry
	Sony Pictures	ICT and finance
	EDF	Services
	Saur Neptun Gdańsk	Services
	Lacroix Electronics	Electronics
	Rolls Royce Marine Polska	Maritime production
Australia	DCT Gdańsk	Maritime
Norway	Nevion Manufacturing	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
Japan	Suruga Seiki	Electroengineering

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.

INTERNATIONAL PAPER KWIDZYN SP. Z O.O.



Marek Krzykowski

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.

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
Prezes Zarządu,
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.**

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.

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).

SONY PICTURES GLOBAL BUSINESS SERVICES



Jarek Zboralski

JAREK ZBORALSKI
People & Organization
Dyrektor, 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



Tczew Czajkowy Subzone – Flextronics

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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REGIONAL PROGRAMME
NATIONAL COHESION STRATEGY



EUROPEAN UNION
EUROPEAN REGIONAL
DEVELOPMENT FUND



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