

CENTRE FOR REGIONAL AND LOCAL
ANALYSES

REGIONAL INVESTMENT ATTRACTIVENESS 2012

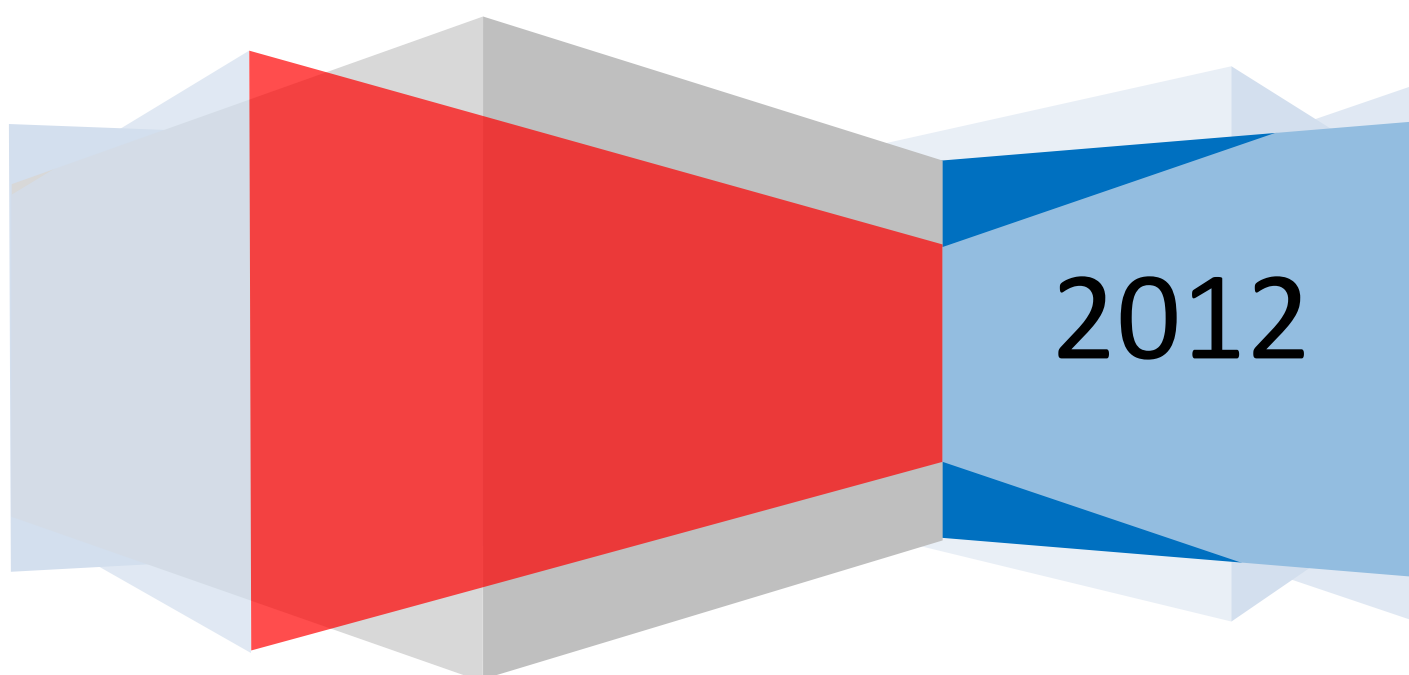
Pomeranian voivodship

*Dr hab. Hanna Godlewska-Majkowska, Ph. D.
university professor at the Warsaw School of Economics*

Agnieszka Komor, Ph.D.

Patrycjusz Zarębski, Ph.D.

Magdalena Typa, M.A.



Warsaw, October 2012

Introduction

This report has been prepared thanks to the application of results of scientific research conducted since 2002 by the Institute of Enterprise, Collegium of Business Administration of the Warsaw School of Economics, under the supervision of Prof. H. Godlewska-Majkowska, Ph.D. All Authors are core members of the team that develops the methodology of calculating regional investment attractiveness in order that important characteristics of regions are captured as closely as possible both in general terms and from a point of view of specificity of a given kind of business activity as well as a size of investment.

Potential investment attractiveness (PAI) indices measure the location-specific advantages of regions. In their simplified version they are calculated for territorial units of various levels of statistical division of the country (gminas/communes, poviats/counties, subregions, voivodships/regions). These are PAI1 indices, which refer to the whole regional/national economy (PAI1_GN) and selected sections: C – manufacturing industry, G – trade and repair, I – tourism and catering, M – professional, scientific and technical services.

Besides, some indices are only calculated for voidoships on the basis of much more characteristics available on the regional or macroregional level. This allows us to evaluate their investment attractiveness in a much broader context. These are PAI2 indices, which are calculated both from a general point of view and with reference to the above mentioned sections of the economy (PAI2_C, PAI2_G, PAI2_I, PAI2_M).

What is more, real investment attractiveness ranks are used in this report, which relates to the inflow of capital (in the form of investments) and the effects of investments considered from a point of view of productivity and returns on the outlays previously made.

The measurements in use are subject to annual review thanks to consulting them with foreign investor assistance institutions and direct contact to territorial self-government units as well as organisations of entrepreneurs. A description of methodological approach to measuring investment attractiveness of Polish regions, counties and communes can be found online on the Web site of the Institute of Enterprise : www.sgh.waw.pl/instituty/ip, on the Web site of the Centre for Regional and Local Analyses, which cooperates with the Institute of Enterprise: www.caril.edu.pl, as well as in numerous scientific publications and expert opinions.

1. The profile of regional economy of Pomeranian voivodship

The economy of Pomeranian voivodship is one of the best developing regional economies in Poland. Its coastal location is conducive to the development of maritime economy in the region: manufacture and repair of vessels and management of ports, fishery or coastal tourism. Recent years are characterised by the robust growth of boat-building: in little shipyards both modern yachts and replicas of medieval boats are built.

The main advantages of the voivodship are:

- there are two science and technology parks and two special economic zones in the voivodship. Among others a production plant manufacturing electronic subassemblies and modern pharmaceutical production plants operate on their premises.
- The Little 'Silicon Valley' comes into being on the outskirts of Gdańsk, where their seats have among others a manufacturer of access control devices (Satel), a manufacturer of multimedia software (Young Digital Planet) and a R&D centre of Intel Technology Poland. The company DGT, a well-known manufacturer of modern communications systems, operates near Gdańsk. In Pomeranian voivodship 8% of all Polish IT companies operate and what is more 18% of computer software is made in the voivodship.
- Pomerania is the world leader in amber products. In more than 3 thousand little workshops about 10 thousand artisans and artists work and design jewellery. Their annual revenue, especially export revenue, is estimated to exceed \$ 300 mln. In 2006 the only Museum of Amber in the world was opened in Gdańsk.
- favourable natural conditions conducive to the development of tourism,
- there is a significant port complex in the region of both domestic and international importance,
- huge R&D potential of voivodship's higher education institutions and research establishments. What distinguishes the system of education in the region is the presence of higher education institutions offering courses of study connected with maritime economy ranked high (category 1) by the Ministry of Science and Higher Education (the Institute of Hydroengineering, Maritime Institute).

Chart 1. General characteristics of the economy of Pomeranian voivodship

Feature	Pomeranian voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	34,267	35,210	-
Population (persons) on 31 December 2011	2,283,500	38,538,447	5.9
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	27,434	492,646	5.6
Secondary schools graduates (persons) in 2011	24,010	421,724	5.7
Number of employed persons on 31 December 2011	744,321	13,911,203	5.4%
Structure of employed persons in 2011	agriculture 7.5% industry 29.9% services 62.6%	agriculture 12.7% industry 30.6% services 56.7%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN mln) in 2010	4,003.6	61,600.3	6.5
Capital of companies (PLN mln)	11,555.7	188,812.4	6.1
Special economic zones (SEZs) in the voivodship			
<ul style="list-style-type: none">- The Pomeranian SEZ, subzones: Chojnice, Człuchów, Gniewino, Krokowa, Sztum, Tczew, Gdańsk (city), Gdynia(city), Kwidzyn(city), Malbork (city), Starogard Gdański (city), Tczew(city);- The Słupsk SEZ, subzones: Debrzno, Słupsk, Żukowo, Słupsk (city)			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)	National economy class C Capital-intensive industry class B Labour-intensive industry class C Trade class C Tourism class B Education class C		
Real investment attractiveness (economic effects evaluation)	National economy class B Industry class B Trade class C Professional science and technical activities class C		
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Gdańsk, Gdańsk (city), Gdynia (city), Słupsk (city), Sopot (city),	
	Class B	Puck	
Gminas**	Class A	Sopot (1), Pruszcz Gdański (1), Tczew (1), Gdańsk (1), Ustka (1), Chojnice (1), Starogard Gdański (1), Krynica Morska (1), Malbork (1), Lębork (1), Gdynia (1), Kwidzyn (1), Słupsk (1), Pruszcz Gdański (2), Wejherowo (1), Puck (1),	

		Kosakowo (2), Kolbudy (2), Rumia (1), Człuchów (1), Władysławowo (1), Jastarnia (1), Reda (1), Łeba (1), Żukowo (3), Kościerzyna (1), Hel (1), Kobylnica (2)
	Class B	Gniewino (2), Bytów (3), Ustka (2), Sztutowo (2), Słupsk (2), Nowy Staw (3), Nowy Dwór Gdański (3), Kościerzyna (2)

In 2009 Pomeranian voivodship made a contribution of 5.7% to the GDP of Poland. . Calculated per capita, it amounted to PLN 34.267 with the average for Poland PLN 35,210. With this result the voivodship occupies the fifth place in the country. The GDP growth rate in the period 2003-2009 amounted to 160.7% while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (62.6%) whereas a share of the agricultural and industrial sectors is respectively 7.5% and 29.9% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 2,283,500 (as of 2011), which makes up 5.9% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 16.5% of the population at pre-reproductive age, 68.1% at reproductive age and 15.5% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 12.1%, compared to 12.4% in Poland¹. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3,691.8, which is 100.1% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 28 higher education institutions in which 104.8 thousand students study, which makes up 6% of all students Poland-wide. Moreover 5.8 % of pupils of secondary schools attend technikum schools and 7.3% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: high-tech industry, logistics, maritime sector, tourism and the manufacture of food.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 3 special economic zone (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Pomorska SSE (Pomeranian special economic zone), subzones: Chojnice, Człuchów, Gniewino, Krokowa, Sztum, Tczew, the city of Gdańsk, the city of Gdynia, the city of Kwidzyn, the city of Malbork, the city of Starogard Gdański, the city of Tczew;
- Słupska SSE (Słupsk special economic zone), subzones: Debrzno, Słupsk, Żukowo, the city of Słupsk.

¹ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

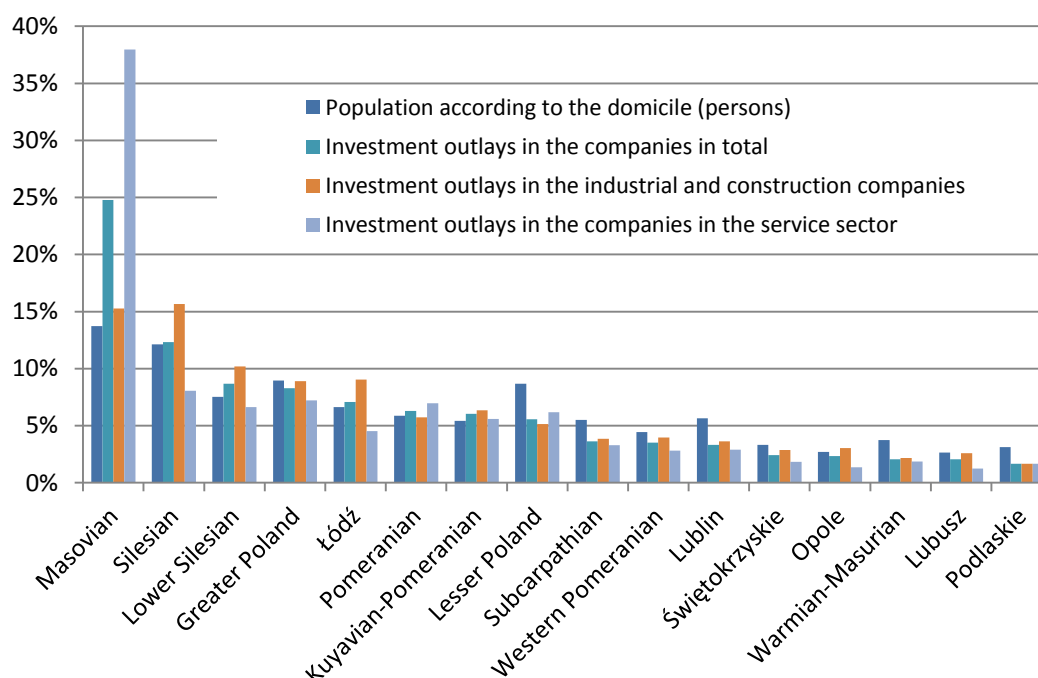
2. Region's rank in terms of investment attractiveness in Poland

Pomeranian voivodship is characterised by a high level of universal investment attractiveness, which demonstrates itself in its rank (Class B) according to the main potential investment attractiveness index for the whole national economy PAI 2_GN (see Exhibit 1 in the Appendix). The region also ranked very high in terms of potential investment attractiveness for the sections: capital-intensive industry (Class B), labour-intensive industry (Class C), trade (Class C), tourism (Class B), professional, scientific and technical activities (Class C).

Investment attractiveness can also be determined on the basis of indices of real investment attractiveness (RAI), based on such microclimates as: returns on tangible assets, labour productivity, self-financing of self-government territorial units and investment outlays - see Exhibit 2 in the Appendix. The region ranked above the average in terms of RAI indices for the national economy (Class B), industry (Class C), trade (Class C), tourism (class C) and professional, scientific and technical activities (Class C) - see Exhibit 2 in the Appendix.

Potential and real investment attractiveness is reflected in the decisions of investors on the flows of capital. This is shown in Exhibit 1. As the exhibit shows, Pomeranian voivodship is competitive in the investments market, as its share in national investment layouts of companies is slightly higher (6.3%) than its population share (5.9%). This applies particularly to investment layouts made in financial and security companies and estate agencies (11.8% of country's total investment layouts in these sectors) as well as agricultural sector (8.7%). This indicates that the market potential of this region has a high esteem among investors.

Exhibit 1. Regional structure of investment outlays in the companies in 2010 in comparison with the share in the population (percentage of country's population)

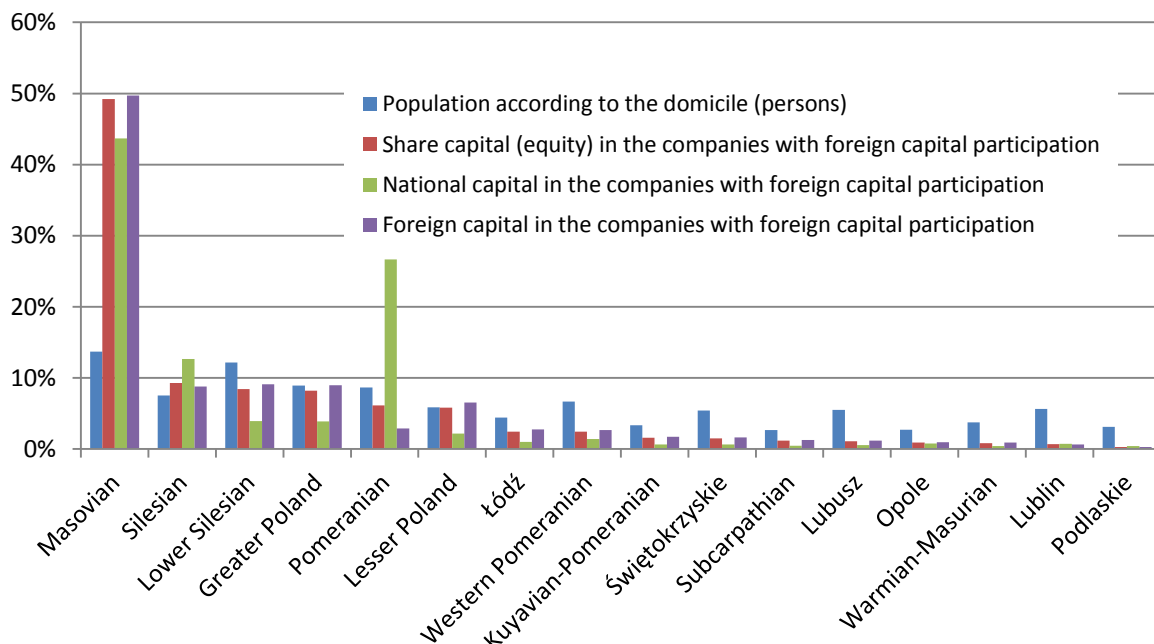


Note: these are the most up-to-date data.

Source: Authors on the basis of the Local Data Bank (downloaded 23.10.2012)

Also the inflow of direct foreign investments confirms attractiveness of Pomeranian voivodship. In 2010 its share in the total value of accumulated share capital in the companies with foreign capital participation was 6.12%, which situated it sixth within the country - see Exhibit 2.

Exhibit 2. Regional structure of capital in the companies with foreign capital participation in comparison with a share in population (% national population)

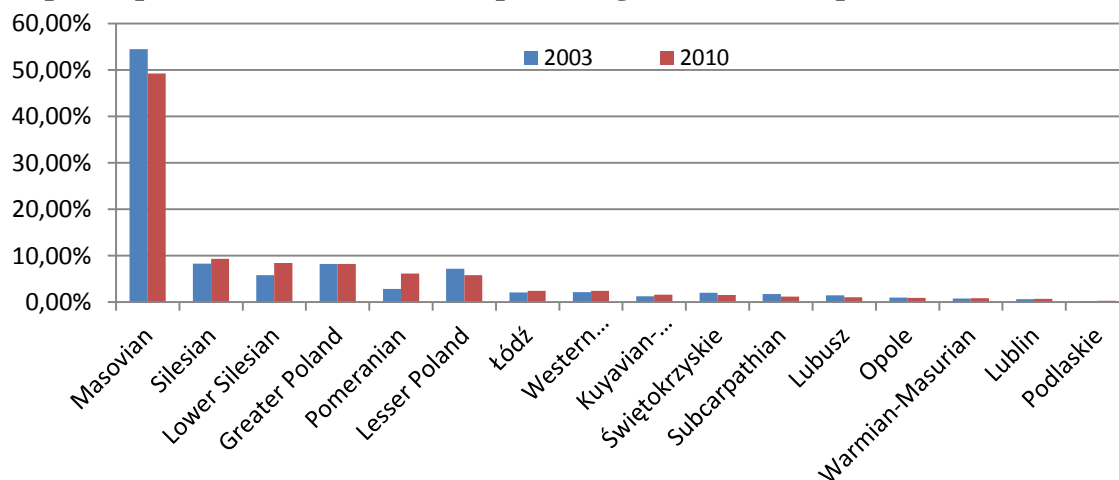


Note: these are the most up-to-date data.

Source: Authors on the basis of the Local Data Bank (downloaded 23.10.2012)

This success was visible in the growth of competitive position of Pomeranian voivodship measured as a value of accumulated share capital in the companies with foreign capital participation from 2.9% to 6.1% (see Exhibit 3).

Exhibit 3. Regional competitive rank in terms of investments with foreign capital participation according to the value of share capital of the companies with foreign capital participation in 2003 and 2010 (percentage of national representation)



Source: Authors on the basis of the Local Data Bank (downloaded 23.10.2012)

Simultaneously Pomeranian voivodship achieved a very good result in absorption of Polish capital engaged in entities with foreign capital participation (26.6%), which was a value second only to Masovian voivodship (43.7%). However, the competitive rank measured as a number of employees of entities with foreign capital participation decreased from 4.8% to 3.8%. The number of such employees increased from 52,887 to 57,335, by 8%, while in the rest of the country this factor was far higher (37%).

An opportunity for Pomeranian voivodship lies in neatly prepared investment offers. Self-government units of Pomeranian voivodship should seek opportunities in careful preparation of offers of investment areas in accordance with their location-specific advantages.

3. Internal diversification of regional investment attractiveness

Poviats (counties)

The following poviats are considered most attractive in Pomeranian voivodship: gdański, the city of Słupsk, the city of Gdańsk, the city of Gdynia, the city of Sopot, pucki - see Chart 2.

Chart 2. Potential investment attractiveness of poviats of Pomeranian voivodship for the national economy and selected sections

Powiat	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
The city of Sopot	0,430	A	A	A	A	A
The city of Gdańsk	0,372	A	A	A	A	A
The city of Gdynia	0,352	A	A	A	A	A
The city of Słupsk	0,341	A	A	A	B	A
gdański	0,319	A	A	B	B	B
pucki	0,298	B	B	B	A	C
kwidzyński	0,274	C	C	C	C	C
lęborski	0,267	C	D	D	B	C
wejherowski	0,266	C	D	D	B	C
chojnicki	0,263	C	D	E	E	C

Source: Authors' own materials.

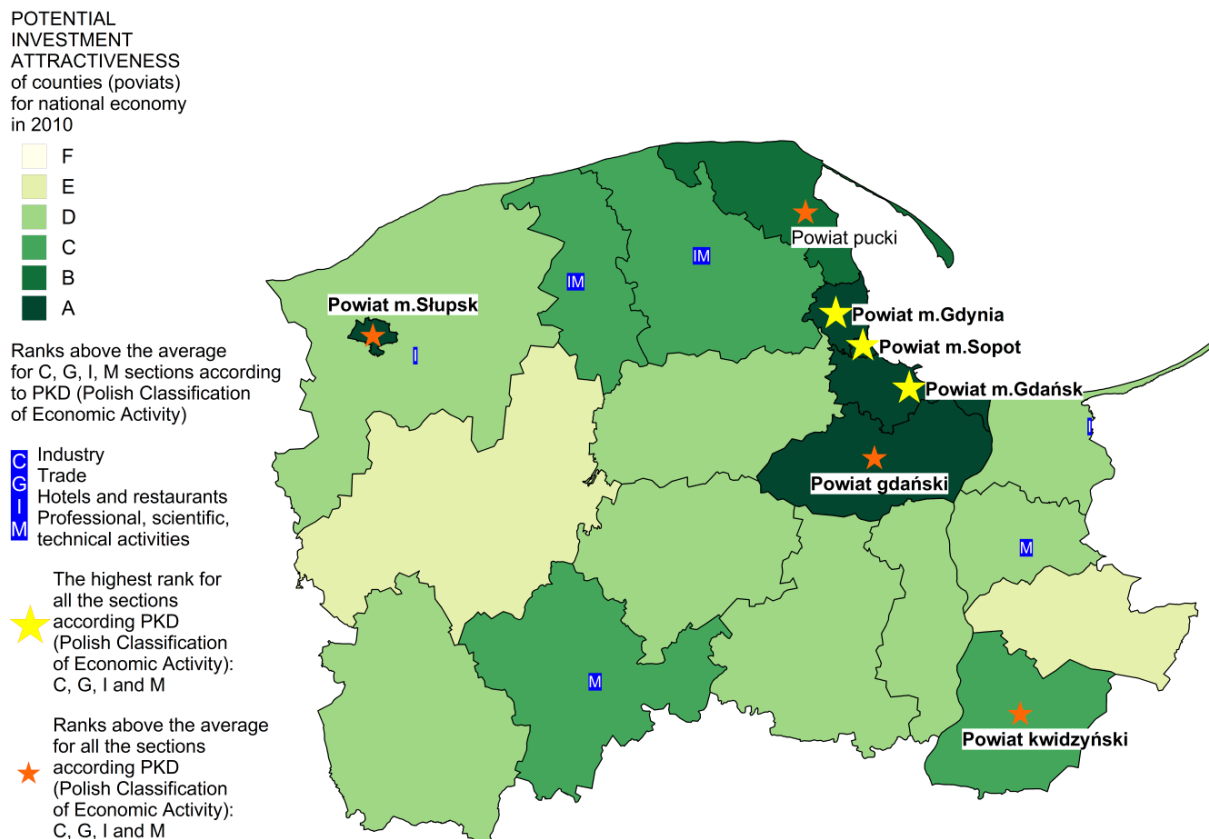
The following poviats should be distinguished: the city of Sopot, the city of Gdańsk and the city of Gdynia as units which attained Class A in their potential investment attractiveness for all sections of the national economy under scrutiny in this research.

In reference to the sections mentioned below the following poviats should be additionally distinguished:

- Kwidzyński (Class C) for section C,
- Kwidzyński (Class C) for section G,
- Pucki, wejherowski, chojnicki, lęborski, kwidzyński, malborski (Class C) for section M.

Synthetic evaluation of potential investment attractiveness of poviats of Pomeranian voivodship is presented in Exhibit 4.

Exhibit 4. Spatial diversification of potential investment attractiveness of poviats of Pomeranian voivodship with consideration of the most attractive sections



Source: Authors' own materials.

Gminas (counties)

Like poviats, gminas are also very much diversified in terms of investment attractiveness. The highest ranked gminas are: Sopot (1), Pruszcz Gdański (1), Tczew (1), Gdańsk (1), Ustka (1), Chojnice (1), Starogard Gdański (1), Krynica Morska (1), Malbork (1), Lębork (1), Gdynia (1), Kwidzyn (1), Słupsk (1), Pruszcz Gdański (2), Wejherowo (1), Puck (1), Kosakowo (2), Kolbudy (2), Rumia (1), Człuchów (1), Władysławowo (1), Jastarnia (1), Reda (1), Łeba (1), Żukowo (3), Kościerzyna (1), Hel (1), Kobylnica (2). It is also reflected in their high ranks (Class A or B) for all analysed sections – see Chart 3.

Chart 3. Potential investment attractiveness of gminas of Pomeranian voivodship for the national economy and selected sections

Gmina	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
Sopot (1)	0,308	A	A	A	A	A
Pruszcz Gdański (1)	0,295	A	A	A	A	A
Tczew (1)	0,283	A	A	A	A	A
Gdańsk (1)	0,283	A	A	A	A	A
Ustka (1)	0,273	A	A	A	A	A
Chojnice (1)	0,271	A	A	A	C	A
Starogard Gdański (1)	0,270	A	A	A	A	A
Krynica Morska (1)	0,269	A	A	A	A	B
Malbork (1)	0,269	A	A	A	B	A
Lębork (1)	0,269	A	A	A	B	A
Gdynia (1)	0,268	A	A	A	A	A
Kwidzyn (1)	0,268	A	A	A	A	A
Słupsk (1)	0,268	A	A	A	B	A
Pruszcz Gdański (2)	0,265	A	A	A	A	A
Wejherowo (1)	0,264	A	A	A	A	A
Puck (1)	0,263	A	A	A	A	A
Kosakowo (2)	0,261	A	A	A	A	A
Kolbudy (2)	0,260	A	A	A	A	A
Rumia (1)	0,252	A	A	A	B	A
Człuchów (1)	0,246	A	A	A	B	A
Władysławowo (1)	0,245	A	A	A	A	A
Jastarnia (1)	0,242	A	A	A	A	A
Reda (1)	0,234	A	A	A	A	A
Łeba (1)	0,231	A	A	A	A	B
Żukowo (3)	0,229	A	A	B	B	A
Kościerzyna (1)	0,229	A	A	A	C	A
Hel (1)	0,229	A	A	A	A	C
Kobylnica (2)	0,224	A	A	A	A	B

(1) – urban commune, (2) – rural commune, (3) – rural-urban commune

Source: Authors' own material.

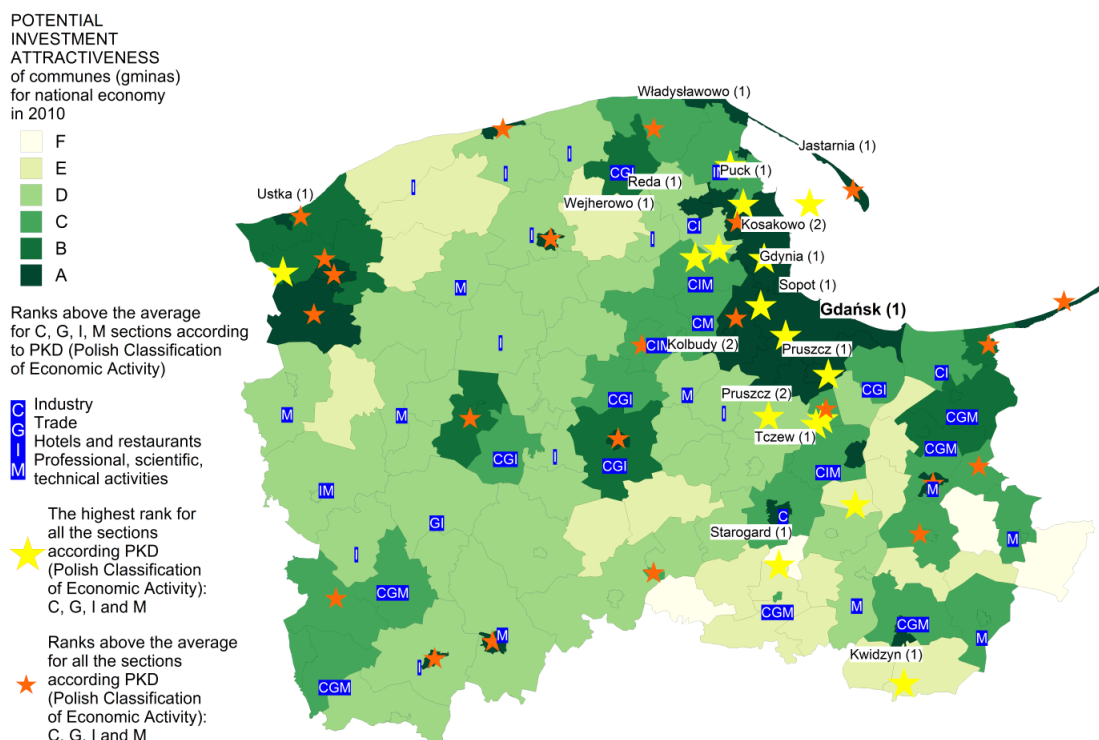
Attractive are also such gminas which belong to Class B according to the PAI1_GN index as: Gniewino (2), Bytów (3), Ustka (2), Sztutowo (2), Słupsk (2), Nowy Staw (3), Nowy Dwór Gdański (3), Kościerzyna (2). The location-specific advantages are also universal in these gminas, which makes them attractiveness for all kinds of business activity in question.

In reference to the sections mentioned below the following gminas of Class C should be distinguished:

- Cedry Wielkie (2), Pszczółki (2), Chmielno (2), Kartuzy (3), Przodkowo (2), Stężyca (2), Stegna (2), Krokowa (2), Szemud (2), Wejherowo (2), Studzienice (2), Czarne (3), Przechlewo (2), Rzeczenica (2), Kwidzyn (2), Nowy Staw (3), Stare Pole (2), Czarna Woda (1), Starogard Gdański (2), Tczew (2), Sztum (3) – for section C,
- Cedry Wielkie (2), Pszczółki (2), Chmielno (2), Stężyca (2), Nowy Dwór Gdański (3), Krokowa (2), Lipnica (2), Studzienice (2), Czarne (3), Przechlewo (2), Rzeczenica (2), Kwidzyn (2), Nowy Staw (3), Stare Pole (2), Sztum (3) - for section G,
- Cedry Wielkie (2), Przywidz (2), Pszczółki (2), Chmielno (2), Kartuzy (3), Stężyca (2), Puck (2), Luzino (2), Szemud (2), Czarna Dąbrówka (2), Lipnica (2), Miastko (3), Studzienice (2), Chojnice (1), Człuchów (2), Koczała (2), Wicko (2), Smołdzino (2), Kościerzyna (1), Lipusz (2), Stare Pole (2), Czarna Woda (1), Tczew (2), Sztum (3) - dla sekcji I,
- Chmielno (2), Kartuzy (3), Przodkowo (2), Somonino (2), Nowy Dwór Gdański (3), Sztutowo (2), Hel (1), Krokowa (2), Puck (2), Szemud (2), Kołczygłowy (2), Miastko (3), Chojnice (2), Czarne (3), Przechlewo (2), Rzeczenica (2), Kępice (3), Potęgowo (2), Słupsk (2), Ustka (2), Kwidzyn (2), Prabuty (3), Malbork (2), Stare Pole (2), Czarna Woda (1), Gniew (3), Tczew (2), Dzierżgoń (3) – for section M.

Synthetic evaluation of potential investment attractiveness of gminas of Pomeranian voivodship is presented in Exhibit 5.

Exhibit 5. Potential investment attractiveness of gminas of Pomeranian voivodship



Source: Authors' own materials.

4. Voivodship's institutional support for investors and entrepreneurs

The development of business surrounding in a region is a vital component of its investment attractiveness. The institutions that support entrepreneurship, pro-investment solutions, research commercialization and innovativeness are of special importance. Among the voivodship's business-supporting institutions one should mention: Pomorski Park Naukowo Technologiczny in Gdynia, Agencja Rozwoju Pomorza in Gdańsk, Agencja Rozwoju Gdyni, Akademicki Inkubator Przedsiębiorczości przy Uniwersytecie Gdańskim, Akademicki Inkubator Przedsiębiorczości (business incubator) of the Gdańsk University of Technology, Bałtycki Klaster Ekoenergetyczny, Gdańskie Centrum Obsługi Przedsiębiorców, Centrum Przedsiębiorczości in Sopot, Centrum Wiedzy i Przedsiębiorczości (Knowledge and Entrepreneurship Centre) – Gdańsk University of Technology, Centrum Transferu Technologii in Gdańsk, Fundacja Gospodarcza Gdynia, Fundusz Pożyczkowy SŁUPIA Słupskie Stowarzyszenie Innowacji Gospodarczych i Przedsiębiorczości, Gdańska Agencja Rozwoju Gospodarczego, Gdańska Fundacja Przedsiębiorczości, Gdański Inkubator Przedsiębiorczości STARTER, Gdański Klaster Budowlany, Gdański Park Naukowo Technologiczny, Gdyńskie Centrum Wspierania Przedsiębiorczości, Inkubator Przedsiębiorczości with Stowarzyszenie Wspierania Przedsiębiorczości w Malborku, Izba Rzemiosła i Przedsiębiorczości Pomorza Środkowego in Słupsk, INTERIZON - Pomorski Klaster ICT, Krajowa Izba Gospodarki Morskiej in Gdynia, Krajowa Izba Gospodarcza Bursztynu in Gdańsk, Kwidzyński Park Przemysłowo-Technologiczny, Rada Regionalna Federacji Stowarzyszeń Naukowo-Technicznych NOT w Słupsku, Pomorska Agencja Rozwoju Regionalnego in Słupsk, Polska Izba Spedycji i Logistyki in Gdynia, Pomorska Izba Przemysłowo-Handlowa in Gdańsk, Pomorska Izba Rzemieślnicza Małych i Średnich Przedsiębiorstw in Gdańsk, Pomorska Okręgowa Izba Inżynierów Budownictwa in Gdańsk, Pomorska Rada Federacji Stowarzyszeń Naukowo-Technicznych NOT in Gdańsk, Pomorski Fundusz Pożyczkowy in Gdańsk, Pomorski Klaster BioEkoChemiczny, Pomorski Regionalny Fundusz Poręczeń Kredytowych in Gdańsk, Regionalna Izba Gospodarcza Pomorza in Gdańsk, Pracodawcy Pomorza in Gdańsk, Słupskie Stowarzyszenie Innowacji Gospodarczych i Przedsiębiorczości, Stowarzyszenie Wolna Przedsiębiorczość Local Branch in Gdańsk.

Pomorski Park Naukowo Technologiczny in Gdynia (Pomeranian Research and Technology Park in Gdynia) offers research and business advice (a project author can cooperate with a counsellor and acquire advice from the Research Council), consulting services, facilitating cooperation, assistance in seeking a technological solution, supporting technology transfer, facilitating access to databases, trainings, workshops, conferences, foreign language and business savoir vivre courses, promotion of Park members' operations, access to laboratories. The Park operates a Regional Patent Information Centre (offering information related to patents and intellectual property protection), an Innovation and Entrepreneurship Incubator, a BioIncubator (aimed at biotechnological firms, which are also targeted by Implementation Laboratory of Biotechnology and Environment Protection). The Incubator, apart from a diversified support offered to its members, offers low operating costs and favourable renting conditions. Additionally, for the companies that are not localised in the Park area, the ePPNT project offers two systems of cooperation: e-Park and e-Incubator. The e-Park system is aimed at already established companies (especially in ITC, industrial design, biotechnology, environment protection, multimedia). The e-Incubator is aimed at companies operating for less than a year or for entrepreneurs that have not yet established their businesses. A member of the system will receive advice from a counsellor and Park experts

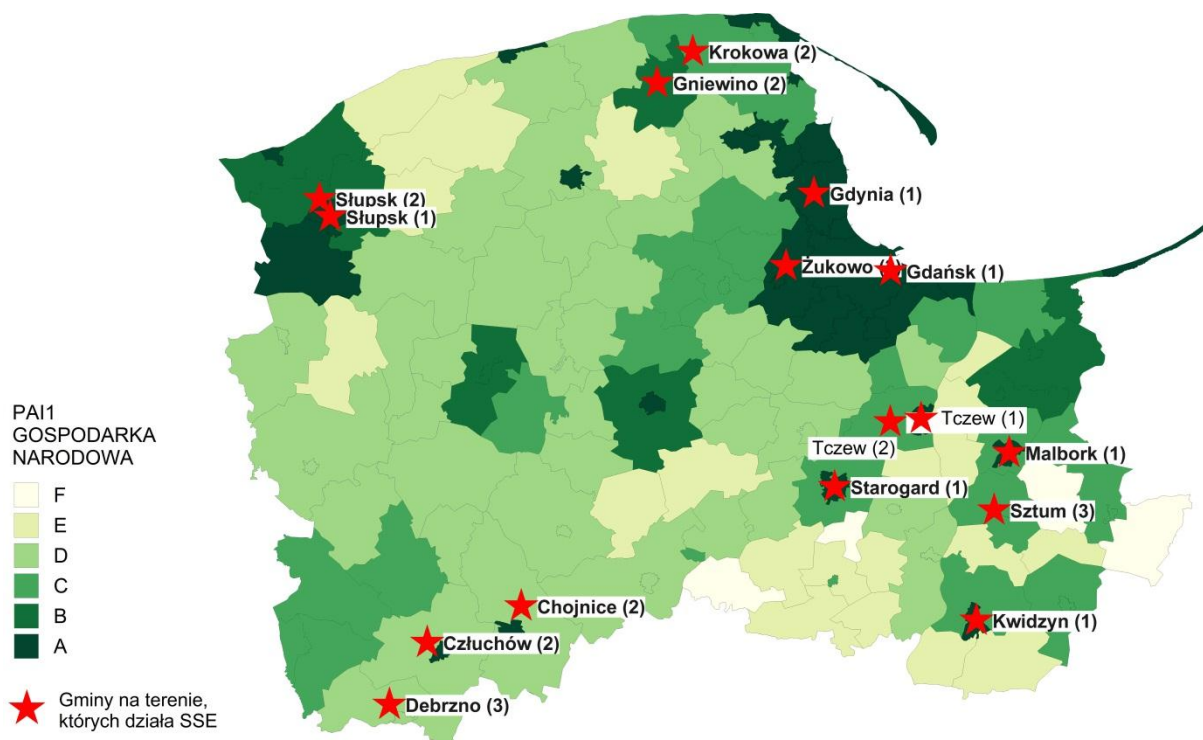
and will be able to benefit from the credibility offered by the Park. (<http://ppnt.pl/>, 02.10.2012.).

Agencja Rozwoju Pomorza in Gdańsk (ARP S.A. Pomerania Development Agency ARP Inc.) offers consulting and training services. It has started a fund aimed at initiating innovativeness by means of free support for entrepreneurs in the initial phases of development and by capital investment in new businesses. The project includes a so-called pre-incubation, which involves advisory and financial support for innovation projects in the early phases of development (free office space, office equipment, free expertise) and investment of up to 200 000 EUR in shares (up to 49%) of companies based on pre-incubated projects. The ARP is engaged in a new system of servicing external investors in Pomorze – Invest in Pomerania, which combine earlier entities that were operating in this field. (<http://www.arp.gda.pl/>, 02.10.2012.).

Special economic zones in Pomeranian voivodeship – effects

There are two special economic zones (SSE) in Pomeranian voivodeship: Pomorska and Słupska. At the end of 2011 the areas of SSE were part of 8 cities and 9 gminas (counties). (Exhibit 6).

Exhibit 6. The location of SSE in Pomeranian voivodeship



Source: Authors' own calculations.

First SSE were established in 1997. The enterprises operating in the zones have until 2011 invested 3,4 billion PLN which constitutes 4% of all economic zone capital expenditures in Poland. In the same period the enterprises have created 11 thousand jobs, which constitutes 6% of all new jobs created in economic zones - cf. Chart 4.

Chart 4. Effects of special economic zone functioning at the end of 2011.

SSE/ Gmina	Leading industries (capital expenditure larger than 20% of overall capital expenditure in the subzone)	New jobs created	Cumulated capital expenditure in million PLN
Pomorska SSE, Chojnice (2)	Roof tiles production	36	57,4
Pomorska SSE, Człuchów (2)			
Słupska SSE, Debrzno (3)		0	0,0
Pomorska SSE, Gdańsk (1)	Machinery, pharmaceuticals, R&D	89	187,0
Pomorska SSE, Gdynia (1)	Large steel constructions		
Pomorska SSE, Gniewino (2)	Metal, fish products	367	76,2
Pomorska SSE, Krokowa (2)	Metal, fish products	367	76,2
Pomorska SSE, Kwidzyn (1)	Electrotechnical	2.045	1.063,6
Pomorska SSE, Malbork (1)	Chemical and construction	186	74,0
Słupska SSE, Słupsk (2)	Synthetic materials, metal products, transport, wood products	1	24,6
Słupska SSE, Słupsk (1)	Car window production, synthetic materials, metal products, light aircraft, fish products	1.534	349,2
Pomorska SSE, Starogard Gdański (1)	Pharmaceutical	1.645	567,5
Pomorska SSE, Sztum (3)			
Pomorska SSE, Tczew (1)	Electronics	3.058	584,4
Pomorska SSE, Tczew (2)	Electrotechnical, metal packaging	1.447	376,3
Pomorska SSE, Tczew (2)	Data unavailable		
Słupska SSE, Żukowo (3)	Plumbing, cooling equipment, steam machinery	188	0,0

Source: Authors' own calculations based on PAIiZ data.

Kwidzyna has attracted the largest investments (INTERNATIONAL PAPER Kwidzyn S.A., JABIL CIRCUIT POLAND sp. z o.o., FABRYKA PLASTIKÓW POMERANIA sp. z o.o., LEMAHIEU POLSKA sp. z o.o.), next is Tczew (SILGAN METAL PACKAGING Tczew S.A., MOLEX PREMISE NETWORKS Sp. z o.o., MBF Sp. z o.o., GEMALTO Sp. z o.o., PRESS GLASS S.A., VETREX Sp. z o.o., E-Doradca sp. z o.o., California Trading sp. z o.o. sp. k., FLEXTRONICS INTERNATIONAL POLAND Sp. z o.o., **P.H. MEGA Jerzy Oleksy**, CARTONDRUCK sp. z o.o., TAPFLO sp. z o.o., WARMUS Investment sp. z o.o.) and Starogard Gdański (AKOMEX sp. z o.o., GILLMET sp. z o.o. - **Cynkownia Ogniowa**, ZAKŁADY FARMACEUTYCZNE „POLPHARMA” S.A.).

The development plans of the SSE in Pomorskie voivodeship assume to attract investors:

- Operating in modern services, hi-tech and machinery industries, data processing, and cooperating with research institutions – in Pomorska SSE,
- Offering logistics services and representing automotive, wood, electro-machinery and metal industries - in Słupska SSE.

‘A’ Commune

Student Scientific Organisation for Entrepreneurship and Regional Analyses affiliated to the Institute of Enterprise of the Warsaw School of Economics, has again published the results of its research into the quality of investor assistance given by the communal authorities. The subject of this study of investment attractiveness is: an audit of Web sites and audit of e-contact in Polish and English with communal authorities. The effect of this study is a ranking ‘A’ Commune, which is thought to distinguish best performing self-government territorial units in terms of the use of means of electronic communication in their assistance. The research is carried out using the mystery client method. In this year’s edition all gminas belonging to Class A according to the PAI 2010 index were subject to query.

As a result 70 gminas have been distinguished; this includes 1 gmina situated in Pomeranian voivodeship.

Chart 5. Gmina in Pomeranian voivodeship distinguished as ‘A’ Commune

Gmina	Powiat	Audit of Web sites	Audit of e-contact in Polish	Audit of e-contact in English	Sum
Chojnice (1)	chojnicki	9	4	0	13

Source: Authors’ own materials.

Chojnice as the only gmin in Pomeranian voivodeship obtained the title of the ‘A’ Commune because of some interesting content of its Web site. Despite a lack of e-mail in English the gmina submitted a brief reply in Polish containing information on preferential conditions for investments in this gmina and an invitation to an meeting.

5. Region's strengths and weaknesses

Pomeranian voivodship has its unique character and clear specificity which influences its strengths and weaknesses. If divided according to the main factors of location and location conditions classified into microclimates composing potential and real investment attractiveness, they can be grouped into strengths (microclimates ranking A, B or C) and weaknesses (microclimates ranking D, E or F) – see Chart 6.

Chart 6. Strengths and weaknesses of Pomeranian voivodship

Strengths of the region according to the microclimates by IP SGH	Weaknesses of the region according to the microclimates by IP SGH
National economy	
Microclimate Human Resources Class A Microclimate Technical Infrastructure Class C Microclimate Market Class C Microclimate Administration/Governance Class C Labour productivity in enterprises Class C Returns on tangible assets Class B Profitability of enterprises Class C Self-financing of self-government units Class C Investment outlays Class A	Microclimate Social Infrastructure Class E Microclimate Social Capital Class E Microclimate Innovativeness Class D
Capital intensive industry	
Microclimate Human Resources Class C Microclimate Technical Infrastructure Class A Microclimate Market Class A Microclimate Administration/Governance Class C Microclimate Innovativeness Class B Returns on tangible assets Class A Labour productivity in enterprises Class C Self-financing of self-government units Class C Investment outlays Class B	Microclimate Social Infrastructure Class D Microclimate Social Capital Class F
Labour intensive industry	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class B Microclimate Market Class C Returns on tangible assets Class A Labour productivity in enterprises Class C Self-financing of self-government units Class C Investment outlays Class B	Microclimate Social Infrastructure Class E Microclimate Social Capital Class F Microclimate Administration/Governance Class D
Trade	
Microclimate Human Resources Class A Microclimate Technical Infrastructure Class B Microclimate Market Class C Labour productivity in enterprises Class C	Microclimate Social Infrastructure Class E Microclimate Social Capital Class E Microclimate Administration/Governance Class D

Self-financing of self-government units Class C	Returns on tangible assets Class F Investment outlays Class D
Tourism	
Microclimate Human Resources Class A Microclimate Technical Infrastructure Class C Microclimate Market Class B Microclimate Administration/Governance Class C Self-financing of self-government units Class C	Microclimate Social Infrastructure Class D Microclimate Social Capital Class E Returns on tangible assets Class F Labour productivity in enterprises Class F Investment outlays Class D
Professional, scientific and technical activities	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class A Microclimate Market Class C Microclimate Administration/Governance Class C Returns on tangible assets Class A Self-financing of self-government units Class C Investment outlays Class C	Microclimate Social Infrastructure Class E Microclimate Social Capital Class E Microclimate Innovativeness Class D Labour productivity in enterprises Class D

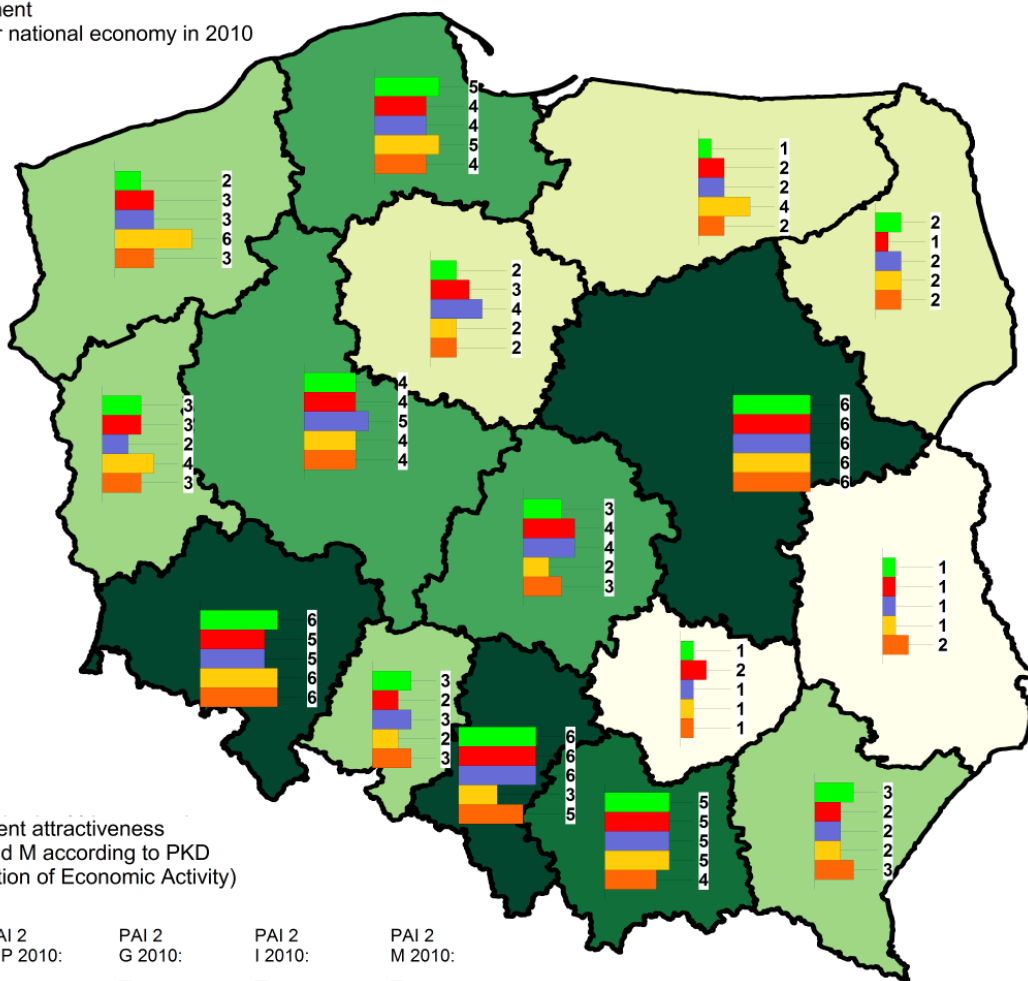
Source: Authors on the basis of the results of research of the Institute of Enterprise of the Warsaw School of Economics (IP SGH).

APPENDIX

Exhibit 1. Potential investment attractiveness of Polish voivodship broken down by basic sections of the national economy

Potential investment attractiveness for national economy in 2010

- Class F
- Class E
- Class D
- Class C
- Class B
- Class A

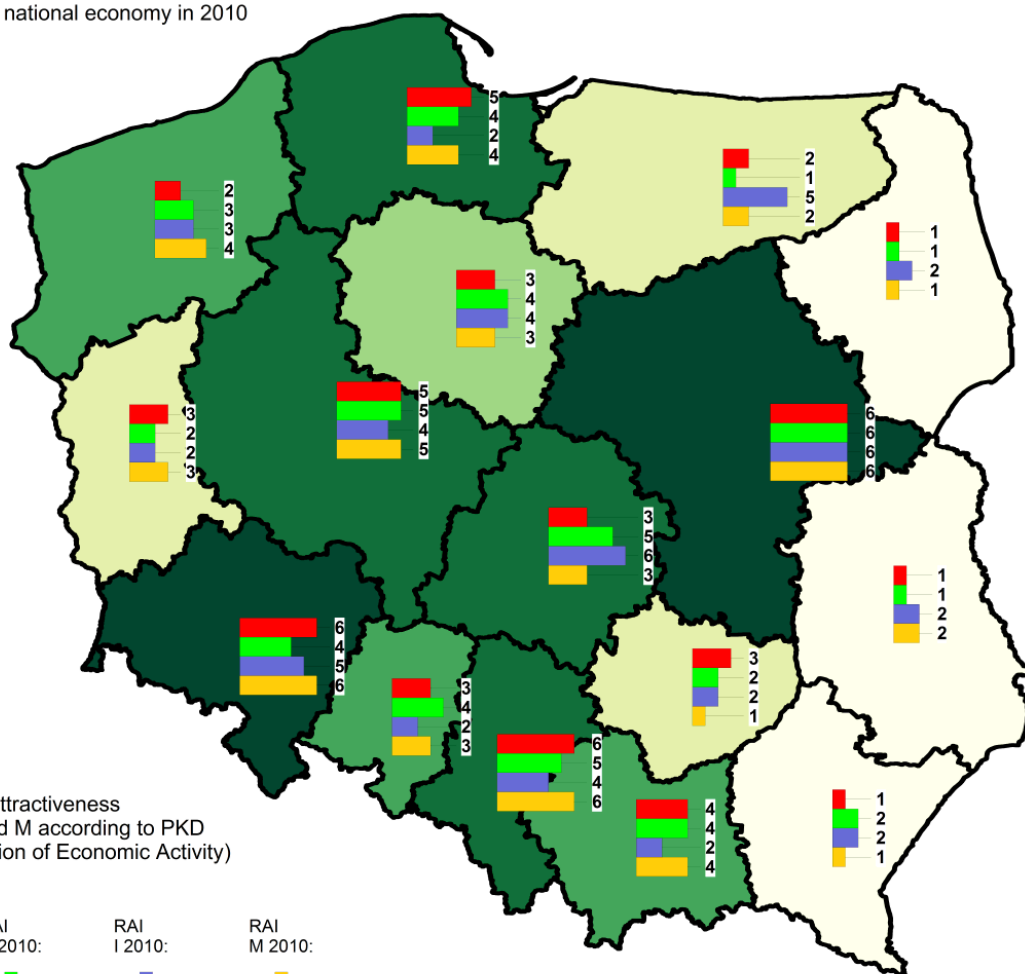


Source: Authors' own materials.

Exhibit 2. Real investment attractiveness of Polish voivodship broken down by basic sections of the national economy

Real investment attractiveness for national economy in 2010

- Class F
- Class E
- Class D
- Class C
- Class B
- Class A



Source: Authors' own materials.

Chart 1. List of investment attractiveness indices for voivodships

Voivodship	LOWER SILESIAN	KUYAVIAN-POMERANIAN	LUBLIN	LUBUSZ	ŁÓDŹ	LESSER POLAND	MASOVIAN	OPOLE	SUBCARPATHIAN	PODLASKIE	POMERANIAN	SILESIAN	ŚWIĘTOKRZYSKIE	WARMIAN-MASURIAN	GREATER POLAND	WESTERN POMERANIAN
PAI1 GN	A	E	F	C	D	C	A	E	D	E	B	A	F	D	B	C
PAI2 GN	A	E	F	D	C	B	A	D	D	E	C	A	F	E	C	D
RAI GN	A	D	F	E	B	C	A	C	F	F	B	B	E	E	B	C
PAI1 C	A	D	F	C	C	C	A	D	E	E	B	A	F	E	C	C
PAI2 C KAPITAŁ	A	E	F	D	D	B	A	D	D	E	B	A	F	F	C	E
PAI2 C PRACA	B	D	F	D	C	B	A	E	E	F	C	A	E	E	C	D
RAI C	A	D	F	D	D	C	A	D	F	F	B	A	D	E	B	E
PAI1 G	A	E	F	C	D	B	A	D	E	F	B	A	F	C	C	C
PAI2 G	B	C	F	E	C	B	A	D	E	E	C	A	F	E	B	D
RAI G	C	C	F	E	B	C	A	C	E	F	C	B	E	F	B	D
PAI1 I	B	E	F	B	E	B	A	E	D	E	B	D	F	B	C	A
PAI2 I	A	E	F	C	E	B	A	E	E	E	B	D	F	C	C	A
RAI I	B	C	E	E	A	E	A	E	E	E	E	C	E	B	C	D
PAI1 M	A	E	F	C	D	C	A	D	D	F	B	B	F	D	B	C
PAI2 M	A	E	E	D	D	C	A	D	D	E	C	B	F	E	C	D
RAI M	A	D	E	D	D	C	A	D	F	F	C	A	F	E	B	C

Source: Authors on the basis of the results of statutory research carried out in the Collegium of Business Administration under the guidance of H. Godlewska-Majkowska.

Chart 2. Potential investment attractiveness of poviats of Pomeranian voivodship for the national economy and selected sections

	PAI1_GN	PAI1_GN_klasy	PAI1_C_klasy	PAI1_G_klasy	PAI1_I_klasy	PAI1_M_klasy
The city of Sopot	0,430	A	A	A	A	A
The city of Gdańsk	0,372	A	A	A	A	A
The city of Gdynia	0,352	A	A	A	A	A
The city of Słupsk	0,341	A	A	A	B	A
gdański	0,319	A	A	B	B	B
pucki	0,298	B	B	B	A	C
kwidzyński	0,274	C	C	C	C	C
łęborski	0,267	C	D	D	B	C
wejherowski	0,266	C	D	D	B	C
chojnicki	0,263	C	D	E	E	C

Source: See Chart 1.

Chart 3. Potential investment attractiveness of gminas of Pomeranian voivodship for the national economy and selected sections

Gmina	PAI1_GN	PAI1_GN_klasy	PAI1_C_klasy	PAI1_G_klasy	PAI1_I_klasy	PAI1_M_klasy
Sopot (1)	0,308	A	A	A	A	A
Pruszcz Gdański (1)	0,295	A	A	A	A	A
Tczew (1)	0,283	A	A	A	A	A
Gdańsk (1)	0,283	A	A	A	A	A
Ustka (1)	0,273	A	A	A	A	A
Chojnice (1)	0,271	A	A	A	C	A
Starogard Gdański (1)	0,270	A	A	A	A	A
Krynica Morska (1)	0,269	A	A	A	A	B
Malbork (1)	0,269	A	A	A	B	A
Lębork (1)	0,269	A	A	A	B	A
Gdynia (1)	0,268	A	A	A	A	A
Kwidzyn (1)	0,268	A	A	A	A	A
Słupsk (1)	0,268	A	A	A	B	A
Pruszcz Gdański (2)	0,265	A	A	A	A	A
Wejherowo (1)	0,264	A	A	A	A	A
Puck (1)	0,263	A	A	A	A	A
Kosakowo (2)	0,261	A	A	A	A	A
Kolbudy (2)	0,260	A	A	A	A	A
Rumia (1)	0,252	A	A	A	B	A
Człuchów (1)	0,246	A	A	A	B	A
Władysławowo (1)	0,245	A	A	A	A	A
Jastarnia (1)	0,242	A	A	A	A	A

Reda (1)	0,234	A	A	A	A	A
Łeba (1)	0,231	A	A	A	A	B
Żukowo (3)	0,229	A	A	B	B	A
Kościerzyna (1)	0,229	A	A	A	C	A
Hel (1)	0,229	A	A	A	A	C
Kobylnica (2)	0,224	A	A	A	A	B
Gniewino (2)	0,217	B	B	A	A	D
Bytów (3)	0,212	B	B	B	B	A
Ustka (2)	0,212	B	B	B	A	C
Sztutowo (2)	0,208	B	B	B	A	C
Słupsk (2)	0,205	B	B	B	B	C
Nowy Staw (3)	0,204	B	C	C	E	B
Nowy Dwór Gdański (3)	0,204	B	B	C	D	C
Kościerzyna (2)	0,202	B	B	B	B	D

Source: See Chart 1.

Note: all indices in this report have been computed on the basis of the most up-to-date data from the Local Data Bank (2012).