CENTRE FOR REGIONAL
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REGIONAL INVESTMENT ATTRACTIVENESS 2013

Pomeranian Voivodship

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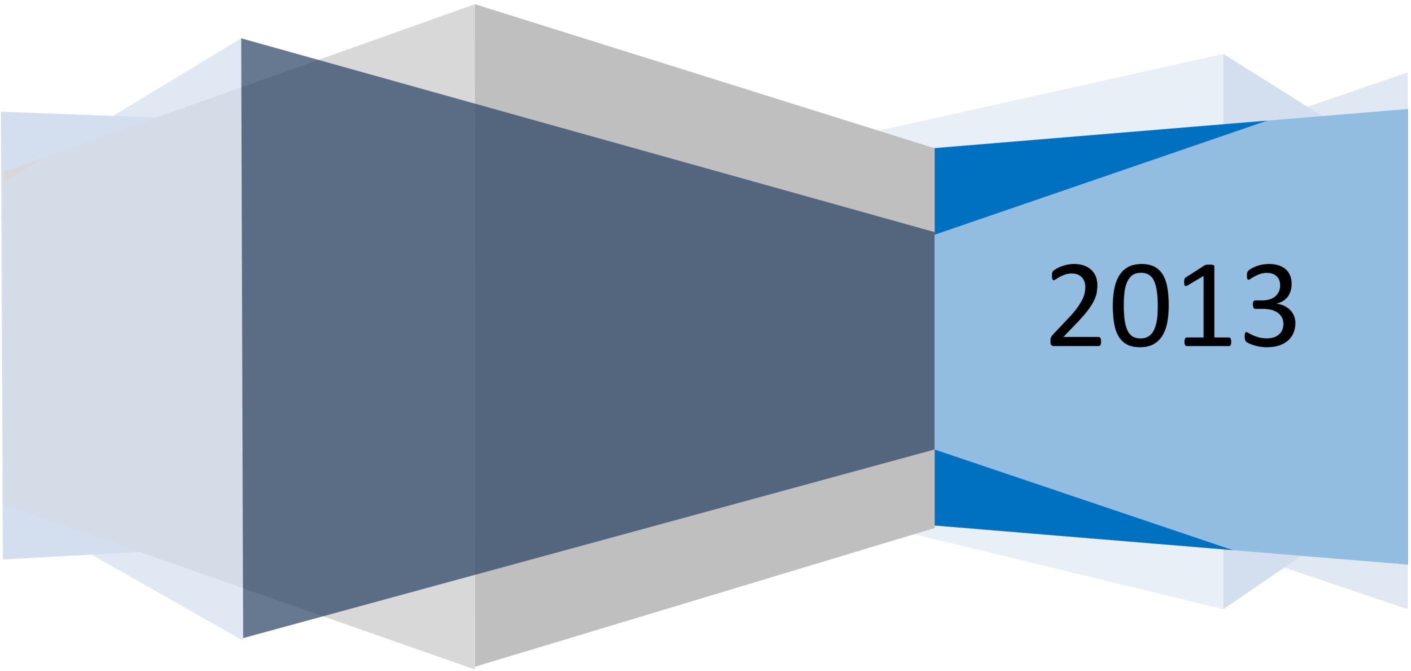


Warsaw, October 2013

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 (WSE), under the supervision of H. Godlewska-Majkowska, Ph.D., university professor at the WSE. All the Authors are the core members of a team that develops methodology of calculating regional investment attractiveness in order that characteristics of regions, which are important to investors, 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 (communes – Polish: *gmina*, counties – Polish: *powiat*, 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 calculated only for the voidoships, on the basis of characteristics available only on the regional or macroregional level which allows evaluating 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, ranks of real investment attractiveness, 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 made, are used in this report.

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 organizations of entrepreneurs. A description of methodological approach to measuring investment attractiveness of Polish regions, counties and communes can be found online on the website 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 conductive 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:

- 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 areas.
- little 'Silicon Valley' being created on the outskirts of Gdańsk, where 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 have their seats. 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 small workshops about 10 thousand artisans and artists work and design jewellery. Their annual revenue, especially export revenue, is estimated to more than USD 300m. In 2006 the only Museum of Amber in the world was opened in Gdańsk.
- favourable natural conditions conducive to the development of tourism,
- significant port complex in the region of both domestic and international importance,
- big 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 I) by the Ministry of Science and Higher Education (the Institute of Hydroengineering, Maritime Institute).

The general characteristics of the Pomeranian voivodship are presented in Table 1.

Table 1. General characteristics of the economy of Pomeranian voivodship

Feature	Pomeranian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	35,597	37,096	-
Population (persons) on 31 December 2012	2,290,070	38,533,299	5.9
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	29,280	484,999	6
Secondary schools graduates (persons) in 2012	23,433	421,317	5.6
Number of employed persons on 31 December 2012	744,321	13,911,203	5.4
Structure of employed persons 2012	agriculture 8.9% industry 29.3% services 61.8%	agriculture 17.1% industry 27.4% services 55.5%	

Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	3841	73704.4	5.2%
Capital of companies (PLN m) in 2011	15042.1	194160.6	7.7%

Special economic zones (SEZs) in the voivodship*
– Pomeranian SEZ, subzone: gm. Chojnice, gm. Człuchów, gm. Gniewino, gm. Krokowa, gm. Sztum, gm. Tczew, m. Gdańsk, m. Gdynia, m. Kwidzyn, m. Malbork, m. Starogard Gdański, m. Tczew – Słupsk SEZ, subzone: gm. Debrzno, gm. Słupsk, gm. Żukowo, m. Słupsk

Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)	
Potential investment attractiveness PAI_2	National economy Class B Capital-intensive industry Class A Labour-intensive industry Class C Trade Class B Tourism Class B Education Class B
Real investment attractiveness RAI	National economy Class C Industry Class C

Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)		
Counties	Class A	Słupsk, Gdańsk (city), Gdynia, Sopot
	Class B	Gdańsk, Puck
Communes	Class A	Pruszcz Gdański (1), Kolbudy (2), Pruszcz Gdański (2), Krynica Morska (1), Sztutowo (2), Hel (1), Jastarnia (1), Puck (1), Władysławowo (1), Kosakowo (2), Reda (1), Rumia (1), Wejherowo (1), Chojnice (1), Człuchów (1), Lębork (1), Łeba (1), Ustka (1), Słupsk (1), Kościerzyna (1), Kwidzyn (1), Malbork (1), Starogard Gdański (1), Tczew (1), Gdańsk (1), Gdynia (1), Sopot (1),
	Class B	Pszczółki (2), Żukowo (3), Krokowa (2), Puck (2), Bytów (3), Lipnica (2), Rzeczenica (2), Kobylnica (2), Słupsk (2), Skórcz (1), Sztum (3),

Source: Authors' own calculations.
* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city.
If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).
Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Pomeranian voivodship made a contribution of 5.6% to the GDP of Poland. Calculated per capita, it amounted to PLN 35,597 with the average for Poland PLN 37,096. With this result the voivodship takes the fifth place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 166.2% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (61.8%) whereas a share of the agricultural and industrial sectors are respectively 8.9% and 29.3% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 2,290,070 (as of 2013), which is 5.9% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 19.7%

of the population at pre-productive age, 63.9% at productive age and 16.4% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 12.8% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3792.4, which is 100.6% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 29 higher education institutions in which there are 106 thousand students studying, which makes up 6.3% of all students in Poland. Moreover, 7.2% of the secondary school students in the voivodship attend vocational schools and 5.8% attend technical schools.

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

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following special economic zones:

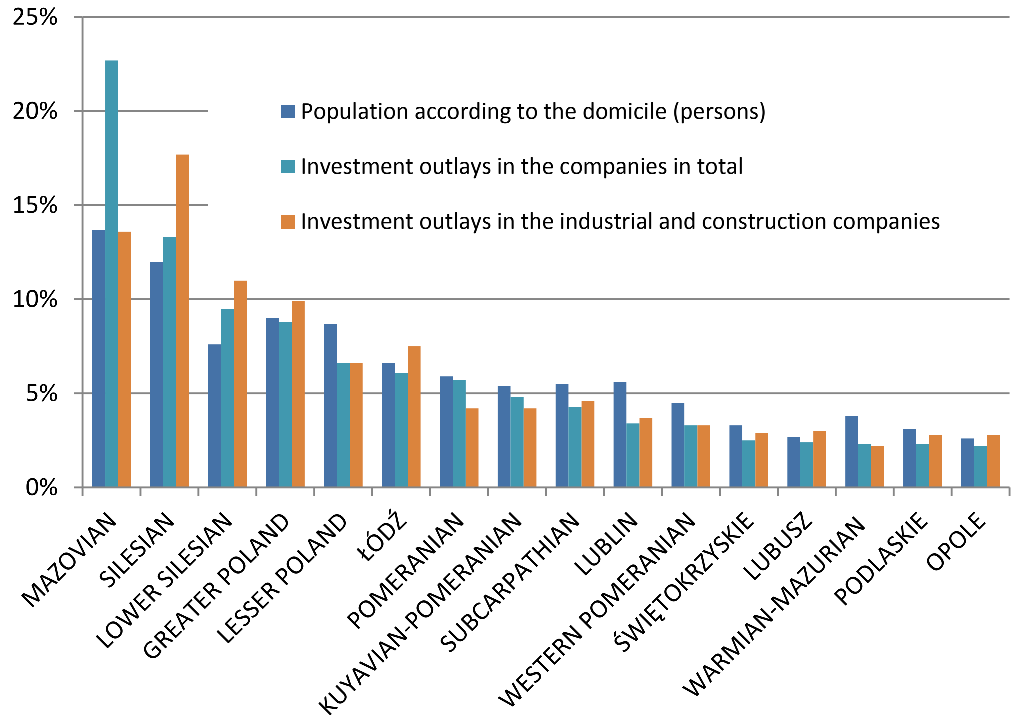
- Pomeranian SEZ, subzone: gm. Chojnice, gm. Człuchów, gm. Gniewino, gm. Krokowa, gm. Sztum, gm. Tczew, m. Gdańsk, m. Gdynia, m. Kwidzyn, m. Malbork, m. Starogard Gdański, m. Tczew,
- Słupsk SEZ, subzone: gm. Debrzno, gm. Słupsk, gm. Żukowo, m. Słupsk.

2. Region's rank in terms of investment attractiveness in Poland and in the European Union

Pomeranian voivodship is characterised by a high level of overall investment attractiveness, which is indicated by the high rank (class B) according to the main potential investment attractiveness index calculated for the whole regional economy PAI 2_GN (see Chart 1 in the Appendix). The region was also ranked very high in terms of potential investment attractiveness calculated with use of PAI2 indices for the sections: capital-intensive industry (class A), labour-intensive industry (class C), trade and repair (class B), hotels and restaurants (class B), professional, scientific and technical activities (class C).[1]

Investment attractiveness can also be evaluated on the basis of indices of real investment attractiveness (RAI), which are based on microclimates such as: return on tangible assets, labour productivity, self-financing of self-government territorial units and investment outlays. The region was ranked above the average in terms of RAI indices for the national economy (class C) and industry (class C) - see Table 2 in the Appendix. Potential and real investment attractiveness is reflected in the decisions of investors on business location. This is shown in Chart 1.

Chart 1. Regional structure of investment outlays in the companies in 2011 in comparison with the share in the country's population



Note: these are the most up-to-date data.
Source: Authors on the basis of the Local Data Bank (downloaded 13 November 2013).

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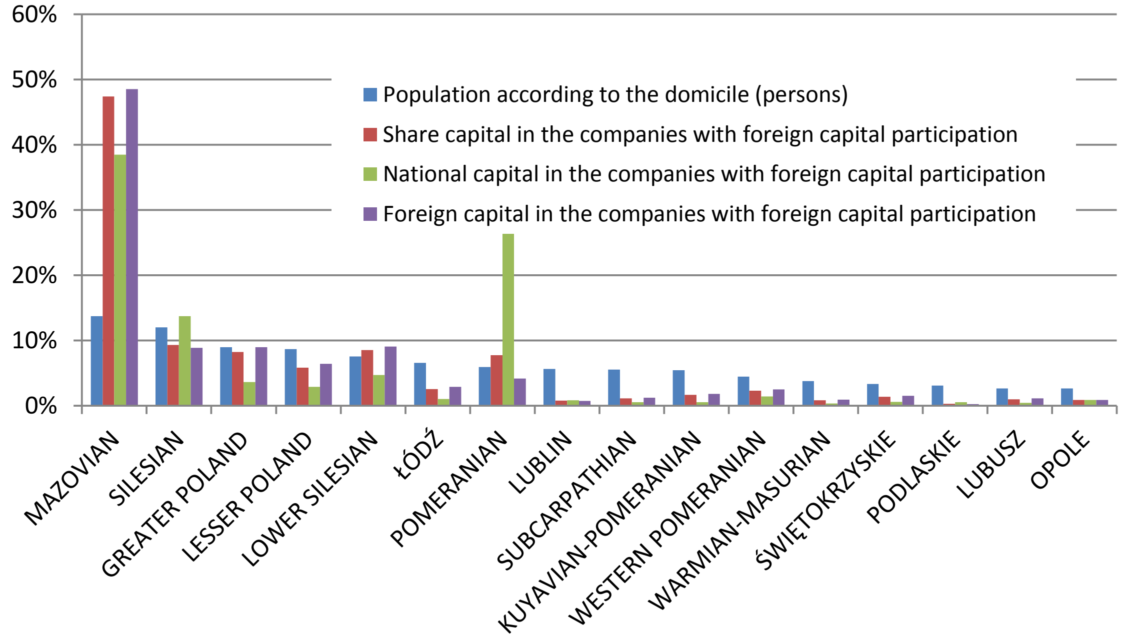
[1] Section C – manufacturing industry, section G – trade and repair, section I – hotels and restaurants, section M – professional, scientific and technical activities. Methodological description of calculation of investment attractiveness of Polish regions, counties and communes can be found on the website of Institute of Entrepreneurship, Collegium of Business and Administration, Warsaw School of Economics: http://kolegia.sgh.waw.pl/pl/KNoP/struktura/IP/publikacje

According to this chart Pomeranian voivodship is competitive on the investments market as its share in the national investment outlays is higher than its share in the country's population could suggest. This concerns investment outlays in industrial companies (market share of 10%). The region is also above the average in terms of setting up companies with foreign capital participation. In 2011 9% of all newly created firms in Poland were located in Pomeranian voivodship. An analysis of the size of accumulated capital in the companies with foreign capital participation leads to the same conclusion – see Chart 2.

As shown on the above chart, the voivodship's share in the domestic investment outlays is slightly lower (5.7%) than its share in Poland's population (5.9%). This also concerns investment outlays in industrial and construction enterprises (4.2%).

In 2011 the voivodship's share in the capital share in the companies with foreign capital participation amounted to 7.75% which gave the voivodship the 7th position in the country – see Chart 2. This was a result of a significant increase of employment of domestic funds.

Chart 2. Regional structure of capital in the companies with foreign capital participation in comparison with a share in population

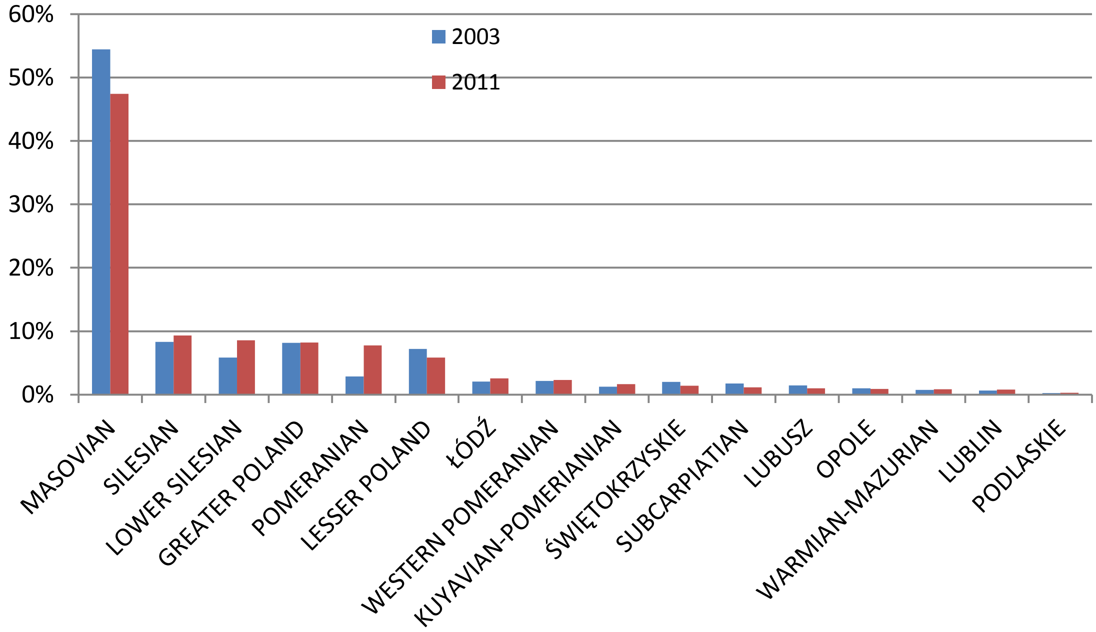


Note: These are the most up-to-date data.
Source: Authors on the basis of the Local Data Bank (downloaded 13 November 2013).

This influenced increase of competitive position of the voivodship in the years 2003-2011, measured with an increase of value of share capital in the companies with foreign capital - its share increased from 2.87% to 7.75% (see Chart 3).

An opportunity for Pomeranian voivodship might be investment sites thoroughly prepared by self-government territorial units, taking opportunities of localization advantages.

Chart 3. Regional competitive rank in terms of investments with foreign capital participation according to the value of share capital in the companies with foreign capital participation in 2003 and 2011 (% of total value for Poland)



Source: Authors on the basis of the Local Data Bank (downloaded 13 November 2013).
taking opportunities of localization advantages

Pomeranian voivodship is concerned as a potential business localization in comparison with the other European regions. When it comes to innovativeness, market and human capital factors, the voivodship took the 149th place of 270 regions in the EU and was ranked Class D – see Table 2 in the Appendix. Together with Mazovia it is the highest ranked Polish region, when the main localization factors are taken into consideration.

Pomeranian voivodship has competitive advantage when it comes to human capital, ranked class B. In the final classification the voivodship took 158th place and was ranked Class D, slightly below the EU average.

The voivodship is more attractive than regions like: **in the Czech Republic:** Stredni Cechy, Severovýchod, Jihozápad, Strední Morava, Severozápad; **in France:** Auvergne, Limousin, Bourgogne, Lorraine, Champagne-Ardenne, Basse-Normandie, Corse, Picardie, Poitou-Charentes; **in Germany:** Schleswig-Holstein, Weser-Ems, Sachsen-Anhalt, Lüneburg; **in the UK:** Shropshire and Staffordshire, Cumbria, South Yorkshire, Tees Valley and Durham, East Yorkshire and Northern Lincolnshire, Highlands and Islands, Lincolnshire, West Wales and The Valleys, Cornwall and Isles of Scilly**; in the Netherlands:** Drenthe; **in Italy**: Valle d'Aosta/Vallée d'Aoste, Marche (NUTS 2006), Abruzzo, Campania, Umbria (NUTS 2006), Molise, Sardegna, Sicilia, Puglia, Basilicata, Calabria; **in Austria**: Niederösterreich, Burgenland (AT), **in Spain**: Comunidad Valenciana, Galicia, Canarias, Illes Balears, Andalucía, Castilla-La Mancha, Extremadura; **in Sweden**: Småland med öarna Norra Mellansverige, **in Belgium:** Prov. Luxembourg (BE), **in Greece**: Kentriki Makedonia, Thessalia, Notio Aigaio, Kriti, Ionia Nisia, Ipeiros, Dytiki Ellada, Anatoliki Makedonia, Thraki, Sterea Ellada, Voreio Aigaio, Dytiki Makedonia, Peloponnisos; **in Slovenia**: Vzhodna Slovenija; **in Hungary**: Nyugat-Dunántúl, Közép-Dunántúl, Dél-Dunántúl, Észak-Magyarország, Dél-Alföld; Észak-Alföld; **in Portugal:** Região Autónoma da Madeira (PT), Algarve, Norte, Alentejo, Região Autónoma dos Açores and Centro (PT); **in Slovakia:** Západné Slovensko, Stredné Slovensko, Východné Slovensko; **in Bulgaria**: Severoiztochen, Severen tsentralen, Yugoiztochen, Yuzhen tsentralen and Severozapaden; **in Romania**: Vest, Nord-Vest, Centru, Sud-Est, Sud-Vest Oltenia, Nord-Est and Sud – Muntenia.

3. Internal diversification of regional investment attractiveness

Counties

The following counties are considered the most attractive in Pomeranian voivodship: Słupsk, Gdańsk (city), Gdynia, Sopot, Gdańsk, Puck – see Table 2.

Table 2. Potential investment attractiveness of counties of Pomeranian voivodship for the national economy and selected sections

County	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
Sopot	0.380	A	A	A	A	A
Gdańsk (city)	0.352	A	A	A	A	A
Słupsk	0.318	A	A	A	B	A
Gdynia	0.314	A	A	A	A	A
Puck	0.290	B	B	B	A	B
Gdańsk	0.287	B	B	B	B	B
Kwidzyn	0.249	C	C	C	C	C
Lębork	0.247	C	D	D	A	C
Wejherowo	0.241	C	D	D	B	C
Nowy Dwór Gdański	0.241	C	D	C	A	D
Człuchów	0.240	C	C	C	B	D

Source: Authors' own calculations.

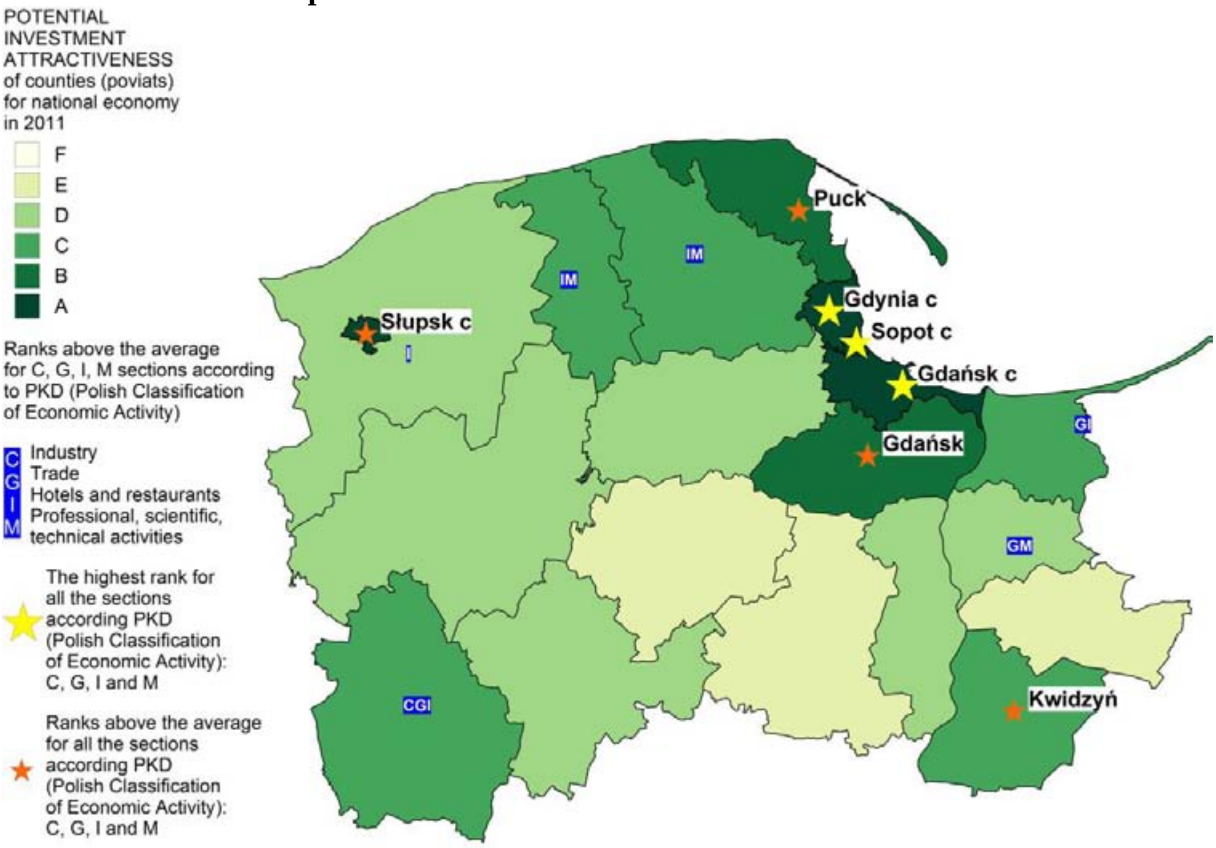
The counties mentioned above (beyond Kwidzyn, Lębork, Wejherowo, Nowy Dwór Gdański, Człuchów) are characterized by very high and high investment attractiveness. The following counties should be distinguished: Sopot, Gdańsk, Gdynia as these units were ranked class A in their potential investment attractiveness for all sections of the national economy analysed in this research.

In reference to the sections mentioned below the following counties should be additionally distinguished (all of them are land counties):

- Kwidzyn, Człuchów (Class C) for section C,
- Kwidzyn, Nowy Dwór Gdański, Człuchów, Malbork (Class C) for section G,
- Kwidzyn(Class C) for section I
- Kwidzyn, Lębork, Wejherowo, Malbork (Class C) for section M.

Synthetic evaluation of potential investment attractiveness of counties of Pomeranian voivodship is presented in Chart 4.

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



Source: Authors' own materials.
Note: "c" stands for city county.

Communes

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

Table 3. Potential investment attractiveness of communes of Pomeranian voivodship for the national economy and selected sections

Commune	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
Sopot (1)	0.287	A	A	A	A	A
Pruszcz Gdański (1)	0.282	A	A	A	B	A
Gdańsk (1)	0.273	A	A	A	A	A
Tczew (1)	0.273	A	A	A	B	A
Malbork (1)	0.267	A	A	A	B	A
Lębork (1)	0.266	A	A	A	B	A
Starogard Gdański (1)	0.262	A	A	A	B	A
Ustka (1)	0.262	A	A	A	A	A

Słupsk (1)	0.261	A	A	A	B	A
Kwidzyn (1)	0.259	A	A	A	A	A
Wejherowo (1)	0.257	A	A	A	A	A
Puck (1)	0.256	A	A	A	A	A
Gdynia (1)	0.255	A	A	A	A	A
Kosakowo (2)	0.252	A	A	A	A	A
Chojnice (1)	0.250	A	A	A	C	A
Rumia (1)	0.249	A	A	A	B	A
Pruszcz Gdański (2)	0.248	A	A	A	A	A
Jastarnia (1)	0.237	A	A	A	A	B
Władysławowo (1)	0.236	A	A	A	A	A
Krynica Morska (1)	0.233	A	A	A	A	B
Hel (1)	0.231	A	A	A	A	C
Reda (1)	0.230	A	A	A	A	A
Kolbudy (2)	0.230	A	A	A	A	A
Człuchów (1)	0.226	A	A	A	B	A
Kościerzyna (1)	0.224	A	A	A	C	A
Sztutowo (2)	0.223	A	A	A	A	B
Łeba (1)	0.222	A	A	A	A	B
Kobylnica (2)	0.206	B	B	B	A	B
Bytów (3)	0.205	B	B	C	B	B
Puck (2)	0.204	B	C	D	B	B
Rzeczenica (2)	0.203	B	B	B	A	C
Skórcz (1)	0.202	B	B	B	D	B
Lipnica (2)	0.202	B	B	D	C	C
Pszczółki (2)	0.202	B	B	C	D	B
Krokowa (2)	0.202	B	C	C	A	C
Żukowo (3)	0.201	B	B	B	B	B
Słupsk (2)	0.201	B	B	B	B	B
Sztum (3)	0.198	B	C	C	C	B

(1) – urban commune, (2) – rural commune, (3) – urban-rural commune
Source: Authors' own calculations.

Attractive communes are also the class B communes according to the PAI1_GN index. Among these communes are: Pszczółki (2), Żukowo (3), Krokowa (2), Puck (2), Bytów (3), Lipnica (2), Rzeczenica (2), Kobylnica (2), Słupsk (2), Skórcz (1), Sztum (3). The location-specific advantages are also universal for these communes, which makes them attractive for all kinds of business activity concerned in this research. However, this characteristic cannot be found in all of the communes that belong to Class C. Only a few Class C communes fulfil this condition: Przykona (2), Nekla (3), Sieraków (3), Zbąszyń (3), Buk (3), Wronki (3) – see Table 3 in the Appendix.

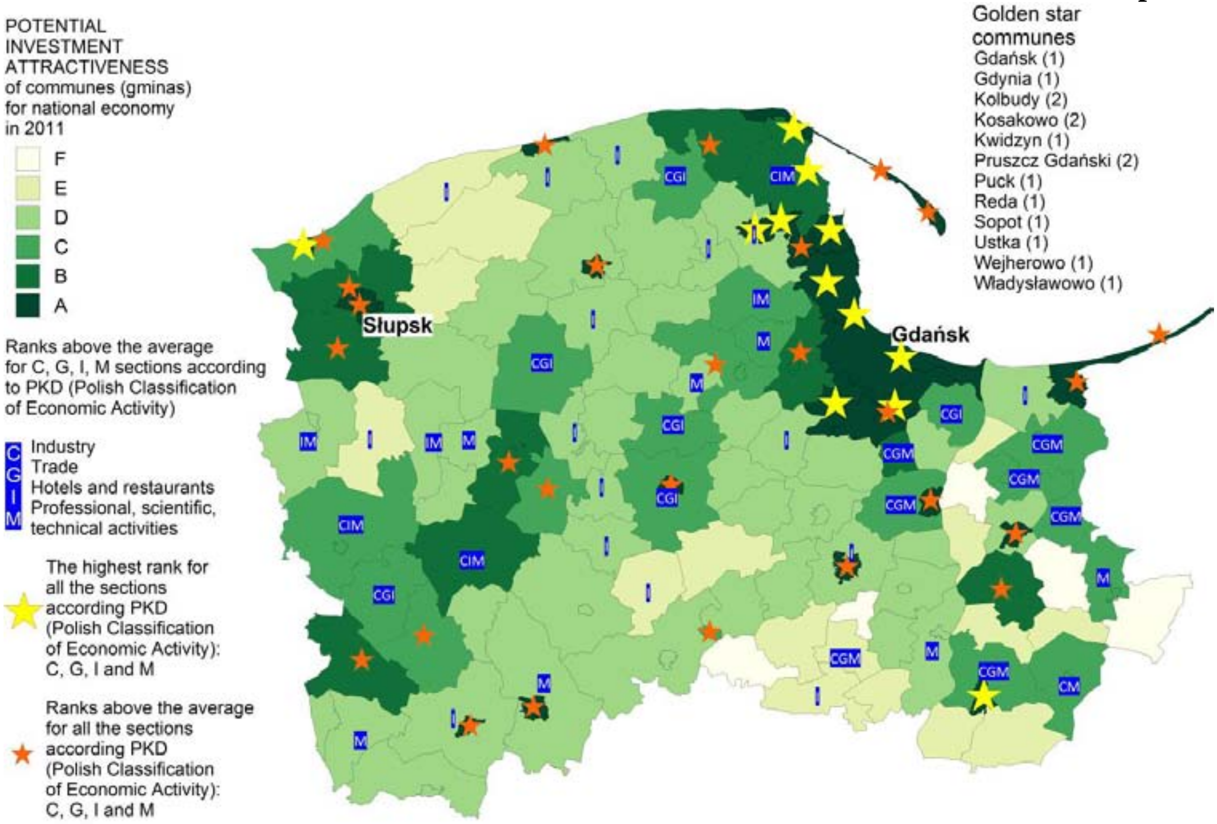
In reference to the particular sections taken into consideration in this research the following communes of Class C should be distinguished:

- Cedry Wielkie (2), Kartuzy (3), Stężyca (2), Nowy Dwór Gdański (3), Krokowa (2), Puck (2), Gniewino (2), Czarna Dąbrówka (2), Miastko (3), Studzienice (2), Koczała (2), Przechlewo (2), Ustka (2), Kościerzyna (2), Kwidzyn (2), Prabuty (3), Nowy Staw (3), Stare Pole (2), Czarna Woda (1), Tczew (2), Sztum (3) - for section C,

- Pszczółki (2), Kartuzy (3), Stężyca (2), Nowy Dwór Gdański (3), Krokowa (2), Gniewino (2), Bytów (3), Czarna Dąbrówka (2), Studzienice (2), Koczała (2), Przechlewo (2), Ustka (2), Kwidzyn (2), Stare Pole (2), Czarna Woda (1), Tczew (2), Sztum (3) - for section G,
- Cedry Wielkie (2), Przywidz (2), Kartuzy (3), Stężyca (2), Luzino (2), Szemud (2), Kołczygłowy (2), Lipnica (2), Miastko (3), Parchowo (2), Trzebielino (2), Chojnice (1), Człuchów (2), Przechlewo (2), Cewice (2), Wicko (2), Kępice (3), Kościerzyna (1), Dziemiany (2), Karsin (2), Lipusz (2), Czarna Woda (1), Osiek (2), Starogard Gdański (2), Sztum (3) - for section I,
- Chmielno (2), Kartuzy (3), Przodkowo (2), Nowy Dwór Gdański (3), Hel (1), Krokowa (2), Szemud (2), Borzytuchom (2), Kołczygłowy (2), Lipnica (2), Miastko (3), Studzienice (2), Chojnice (2), Czarne (3), Przechlewo (2), Rzeczenica (2), Kępice (3), Ustka (2), Kwidzyn (2), Prabuty (3), Stare Pole (2), Czarna Woda (1), Gniew (3), Dzierzgoń (3) - for section M.

Synthetic evaluation of potential investment attractiveness of communes of Pomeranian voivodship is presented in Chart 5.

Chart 5. Potential investment attractiveness of communes of Pomeranian voivodship



Source: Authors' own materials.

4. Voivodship's institutional support for investors and entrepreneurs

The development of business supporting institutions in a region is a vital component of its investment attractiveness. The institutions that support entrepreneurship, pro-investment solutions, research commercialization and enterprises' innovativeness are of special importance. Among the voivodship's business-supporting institutions that influence the voivodship's economic development the following ones should be mentioned (excluding scientific research institutions):

- chambers of commerce: Izba Rzemiosła i Przedsiębiorczości Pomorza Środkowego in Słupsk, Krajowa Izba Gospodarki Morskiej in Gdynia, Krajowa Izba Gospodarcza Bursztynu in Gdańsk, Polska Izba Spedycji i Logistyki in Gdynia, Pomorska Izba Przemysłowo-Handlowa in Gdańsk, Pomorska Izba Rzemieślnicza Małych i Średnich Przedsiębiorstw in Gdańsk, Centrum Wspierania Biznesu/Pomorska Izba Przemysłowo-Handlowa Oddział Gdańsk, Pomorska Okręgowa Izba Inżynierów Budownictwa in Gdańsk, Regionalna Izba Przemysłowo-Handlowa w Wejherowie, Regionalna Izba Gospodarcza Pomorza in Gdańsk,
- associations (including business centres): Stowarzyszenie Wolna Przedsiębiorczość Oddział Terenowy in Gdańsk, Słupskie Stowarzyszenie Innowacji Gospodarczych i Przedsiębiorczości, Centrum Przedsiębiorczości in Sopot, Business Center Club- Loża Gdańska, Centrum Obsługi Przedsiębiorcy in Gdańsk, Centrum wiedzy i przedsiębiorczości PG in Gdańsk, Centrum Transferu Technologii in Gdańsk, Fundacja Gospodarcza in Gdynia, Gdańska Fundacja Przedsiębiorczości, Gdański Klub Biznesu, Starogardzki Klub Biznesu, Gdańskie Centrum Obsługi Przedsiębiorców, Gdyńskie Centrum Wspierania Przedsiębiorczości, Instytut Rozwoju in Sopot, Ośrodek Innowacji NOT in Słupsk,
- business incubators: Mikroinkubator przedsiębiorczości in Sopot, Inkubator Innowacji i Przedsiębiorczości Pomorskiego Parku Naukowo-Technologicznego in Gdynia, Bioinkubator Pomorskiego Parku Naukowo-Technologicznego in Gdynia, Akademicki Inkubator Przedsiębiorczości Fundacji Akademickie Inkubatory Przedsiębiorczości UG, Akademicki Inkubator Przedsiębiorczości Politechniki Gdańskiej, Gdański Inkubator Przedsiębiorczości, Inkubator – Ośrodek Przedsiębiorczości Debrzno, Inkubator Przedsiębiorczości przy Stowarzyszeniu Wspierania Przedsiębiorczości in Malbork, Słupski Inkubator Technologiczny,
- technology parks, science parks, industrial parks: Pomorski Park Naukowo-Technologiczny in Gdynia, Kwidzynski Park Przemysłowo-Technologiczny, Gdański Park Naukowo Technologiczny, Zielony Park Przemysłowy in Cierzno,
- consulting centres (including personal consulting and agricultural consulting Pomorski Ośrodek Doradztwa Rolniczego in Gdańsk,
- financial institutions (guarantee funds): Fundusz Pożyczkowy SŁUPIA Słupskie Stowarzyszenie Innowacji Gospodarczych i Przedsiębiorczości (SSIGiP), Fundusz Pożyczkowy INKUBATOR (SSIGiP), Fundusz Rozwoju Przedsiębiorczości (SSIGiP), Fundusz Poręczeń Kredytowych (SSIGiP), Fundusz Mikro in Gdańsk, Gdańska Akademia Bankowa przy Instytucie Badań nad Gospodarką Rynkową, Pomorski Regionalny Fundusz Poręczeń Kredytowych in Gdańsk, Pomorski Fundusz Pożyczkowy in Gdańsk, Subregionalny Fundusz Pożyczkowy "Gryf" Polska Fundacja Przedsiębiorczości in Gdańsk,
- others: Agencja Rozwoju Pomorza in Gdańsk, Regionalny Ośrodek Informacji Patentowej / Pomorski Park Naukowo-Technologiczny in Gdynia, Agencja Rozwoju Gdyni, Gdańska Agencja Rozwoju Gospodarczego, Pomorska Agencja Rozwoju Regionalnego, Wojewódzkie Zrzeszenie Handlu i Usług in Gdańsk, Międzynarodowe Targi Gdańskie,

Pomorska Rada Federacji Stowarzyszeń Naukowo-Technicznych NOT in Gdańsk (Instytut Naukowo-Techniczny), Powiatowy Cech Rzemiosł Małych i Średnich Przedsiębiorstw w Wejherowie, Regionalne Towarzystwo Inwestycyjne Dzierzgoń, Pracodawcy Pomorza in Gdańsk.

Association of Free Entrepreneurship branch in Gdańsk *(Stowarzyszenie Wolna Przedsiębiorczość Oddział Terenowy w Gdańsku)* runs projects supporting small and medium enterprises and persons who start running a business. The association offers information services (looking for business partners, trade reports concerning companies, micro- and macroeconomic market analyses, legal information, information on external financing for businesses, including EU funds), consulting services (setting up and running a business, human resources management, market research, accounting and business plans). Information and consultations are also offered in information and consulting points in Lębork, Kartuzy and Sopot and online as well. The association is a centre of Enterprise Europe Network, National System of Services for Small and Medium Enterprises. The association organizes trade missions for Polish enterprises (business talks, fair visits, visits in foreign companies) and for foreign enterprises coming to Poland (talks and visits in Polish companies). The association's offer also includes trainings (also for persons setting up and running business, according to the customer's needs), organizing seminars, presentations and conferences on current economic issues. One of the projects of the association is **Entrepreneurship Centre in Sopot** (a part of it is **Entrepreneurship Microincubator in Sopot**) (http://www.swp.gda.pl/, 05 November 2013)

Słupsk Association of Economic Innovations and Entrepreneurship (*Słupskie Stowarzyszenie Innowacji Gospodarczych i Przedsiębiorczości)* offers training, consulting and information services. It also offers financial services, including **Loan Fun SŁUPIA** (investment loans and turnover loans for small and microenterprises and for persons beginning their business activity), **Loan Fund INKUBATOR** (loans for people planning to start their business or to develop their business and loans for investment purchases. The **Fund of Entrepreneurship Development** (loans for the unemployed and for units creating new jobs or declaring to sustain existing jobs), **Loan Guarantee Fund** (granting loan guarantees, tender guarantees and guarantees of proper contract realization for the companies of the unemployed opening a new business. (http://www.inkubator.slupsk.pl/, 05 November 2013)

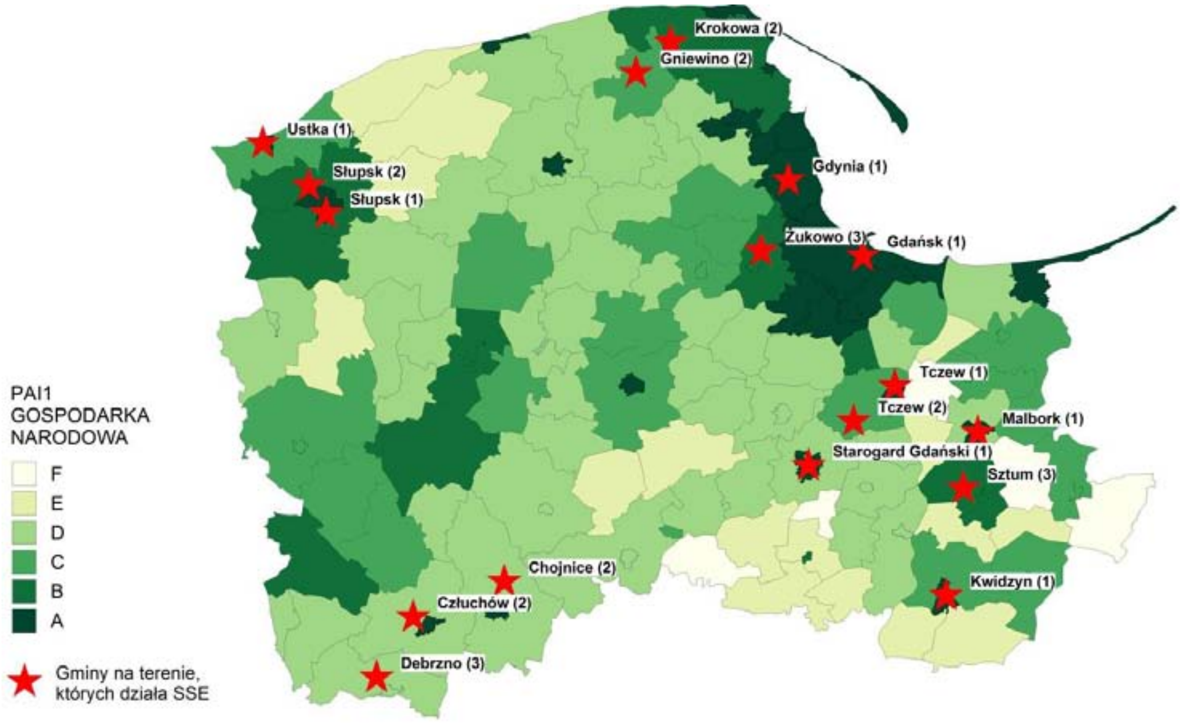
Pomeranian Research and Technology Park in Gdynia *(Pomorski Park Naukowo-Technologiczny w Gdyni)* offers research and business advice (a project author can cooperate with a counsellor and acquire advice from the Research Council), consulting services, facilitating cooperation, assistance in seeking for technological solutions, 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 and prototype rooms. 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 above-mentioned support offered to its members, offers low operating costs and favourable renting conditions. For the newly starting entrepreneurs Startup Gdynia Area has been created – a place where a co-working office is offered as well as consulting, mentoring, thematic meetings, networking meetings and workshops. The park also develops a module of "Social Innovations", building cooperation, running projects and organizing events concerning this topic. In 2013 Design Centre Gdynia was opened offering support for development and promotion of creative sectors which offers office space, prototype rooms with full amenities, cinema, exhibition halls and conference halls. There is also a Science Centre “Eksperyment” operating in the park – an interactive exhibition which aims at learning by playing. The exhibition has four parts: Hydroworld, Tree of Life, Invisible Powers, Action-Human. 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. (http://ppnt.pl/, 05 November 2013)

Pomeranian Development Agency in Gdańsk *(Agencja Rozwoju Pomorza w Gdańsku)* offers information and consulting services (also online) within the centres of National Consultation Points of National System of Services and regional network of Regional Network of Information Points (PI)ARP S.A. as well as training services. Within the agency a Capital Fund operates that aims at initiating innovative activities by free of charge support for the creators of new ideas in the first phase of development, and then capital for the new-created company. The activity within the project includes preincubation – essential support and financial support at the beginning of their development (i.a. free of charge office spaces office amenities, consulting services) and then investment up EUR 200,000 in stocks (in the share up to 49%) of the companies based on preincubated projects. The Agency also offers system services for investors – Invest in Pomerania. The offer includes preparation of reports on economic situation of the region and its subregions, including the microeconomic factors chosen by the investor, preparation of reports on law acts on conducting business activities in Poland and available forms of financing investments, help at setting up contacts with local authorities, potential business partners from the region, suggesting offers of available office spaces, stocks and investment sites, organizing visits in the region, complex support after making investments (including services of investor’s representative). (http://www.arp.gda.pl/, 05 November 2013)

Special economic zones in Pomeranian voivodship – effects

There are 2 special economic zones (SEZs) in Pomeranian voivodship: Pomeranian SEZ and Słupsk SEZ. At the end of 2012 the areas of the SEZs were parts of 8 cities and 9 communes – see Chart 6.

Chart 6. The location of SEZs in Pomeranian voivodship



Note: Red stars indicate communes with SEZ subzones within their areas.
Source: Authors' own calculations.

The first SEZ areas were brought into life in 1997. The investment outlays made by SEZ companies operating in the communes of Pomerania by the end of 2012 amounted to PLN 3.6 billon, which made 4% of all investment outlays made in the Polish SEZs. In the same time the SEZ companies in the region created 9.7 thousand new jobs which made 5% of all jobs created in the Polish SEZs (see Table 4).

Table 4. Effects of special economic zone functioning at the end of 2012

SEZ / Subzone	County, Commune	Leading industries (at least 20% share of revenue or employment	Cumulated capital expenditure in million PLN (end of 2012)	Jobs number (end of 2012)
Słupsk / Tuchom	Kartuzy, Żukowo (3)			
Pomeranian / Żarnowiec	Puck, Krokowa (2)	food products, metals	148.93	725
Pomeranian / Żarnowiec	Wejherowo, Gniewino (2)	no investors yet		
Pomeranian / Chojnice	Chojnice, Chojnice (2)	other mineral non-metallic products	57.34	36
Pomeranian /	Człuchów, Człuchów (2)	no investors yet		

Człuchów				
Słupsk / Debrzno	Człuchów, Debrzno (3)	no investors yet		
Słupsk / Ustka	Słupsk, Ustka (1)	no investors yet		
Słupsk / Redzikowo	Słupsk, Słupsk (2)	food products, storage and transport support activities,	154.16	330
Słupsk / Słupsk	Słupsk (city), Słupsk (1)	fabricated metal products (except machinery and equipment), storage and transport support activities,	257.80	928
Pomeranian / Kwidzyn	Kwidzyn, Kwidzyn (1)	paper and paper products, computers, electronic and optical products,	1,079.03	1,504
Pomeranian / Malbork	Malbork *, Malbork (1)	chemicals and chemical products	74.26	124
Pomeranian / Starogard Gdański	Starogard Gdański, Starogard Gdański (1)	basic pharmaceutical products and pharmaceutical preparations	584.28	1,671
Pomeranian / Tczew	Tczew, Tczew (1)	computers, electronic and optical products	744.08	3,246
Pomeranian / Tczew	Tczew, Tczew (2)	rubber and plastic products, other mineral non-metallic products,	124.19	873
Pomeranian / Sztum	Sztum, Sztum (3)	food products	0.41	
Pomeranian / Gdańsk	Gdańsk (city), Gdańsk (1)	paper and paper products	362.11	112
Pomeranian / Gdynia	Gdynia (city), Gdynia (1)	fabricated metal products (except machinery and equipment)	51.04	116

Source: Authors' own calculations based on the Ministry of Economy data.

The largest investments in voivodship's SEZs have been completed in Kwidzyn (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.), 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. – galvanizing company, ZAKŁADY FARMACEUTYCZNE „POLPHARMA" S.A.).

The development plans of the SEZ in Pomeranian voivodship assume to attract investors:

- operating in modern services, hi-tech and machinery industries, data processing, and cooperating with research institutions – in Pomeranian SEZ,
- offering logistics services and representing automotive, wood, electro-machinery and metal industries - in Słupsk SEZ.

'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 offered by the communal authorities.

The subject of this qualitative research of investment attractiveness is evaluation of the websites and evaluation of e-mail contact with communal authorities in two languages: Polish and English. The effect of this research 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 to provide assistance to the customers. The research is carried out with the use of mystery client method. In this year’s edition all communes belonging to Class A and B according to the PAI 2011 index were subject to the evaluation.

As a result 90 communes were distinguished, of which 10 are situated in Pomeranian voivodship (see Table 5).

Table 5. Communes in Lower Silesian voivodship distinguished as ‘A’ Communes

Place in the ranking (for the whole country)	Commune	Evaluation of websites (score)	Evaluation of e-mail contact in Polish (score)	Evaluation of e-mail contact in English (score)	Sum
4	Tczew (1)	14.0	7.0	11.0	32.0
13	Słupsk (1)	14.5	13.0	0.0	27.5
17	Ustka (1)	10.5	11.0	5.0	26.5
18	Kościerzyna (1)	6.0	11.0	9.0	26.0
25	Lębork (1)	11.5	9.0	5.0	25.5
26	Sztutowo (2)	6.5	11.0	8.0	25.5
31	Kobylnica (2)	10.5	9.0	5.0	24.5
38	Gdańsk (1)	14.0	7.0	3.0	24.0
68	Kolbudy (2)	9.5	11.0	0.0	20.5
77	Gdynia (1)	15.0	5.0	0.0	20.0

Source: Authors’ own materials based on the research.

The above-mentioned communes were granted “A” Communes mainly because of interesting websites and detailed answers to e-mail inquiries (in most cases both in English and in Polish). Gdynia should be especially distinguished as there is a virtual officer guiding through the city. The website contains investment offers and is prepared in 7 languages. When it comes to e-mail correspondence, Tczew and Gdynia should be distinguished as they asked business environment for help to prepare the answers for inquiries.

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 that influence potential and real investment attractiveness, they can be grouped into strengths (microclimates with ranking A, B or C) and weaknesses (microclimates with ranking D, E or F) – see Table 6.

Table 6. Strengths and weaknesses of Pomeranian voivodship

Strengths of the region according to the microclimates by the Institute of Enterprise of the Warsaw School of Economics	Weaknesses of the region according to the microclimates by the Institute of Enterprise of the Warsaw School of Economics
National economy	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class B Social Microclimate Class C Market Microclimate Class C Microclimate Administration/Government Class B Microclimate Innovativeness Class B Productivity of enterprises Class C Rentowność majątku trwałego Class B Samofinansowanie jst Class C	Microclimate Social Infrastructure Class D Profitability of enterprises Class E Investment outlays Class D
Capital-intensive industry	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class A Market Microclimate Class C Microclimate Administration/Government Class C Microclimate Innovativeness Class A Renturns on tangible assets Class C Productivity of enterprises Class C Self-financing of self-government units Class C	Microclimate Social Infrastructure Class D Social Microclimate Class D Investment outlays Class D
Labour-intensive industry	
Microclimate Human Resources Class A Microclimate Technical Infrastructure Class B Social Microclimate Class C Market Microclimate Class B Renturns on tangible assets Class C Productivity of enterprises Class C Self-financing of self-government units Class C	Microclimate Social Infrastructure Class E Microclimate Administration/Government Class D Investment outlays Class D
Trade	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class C Social Microclimate Class A Market Microclimate Class B Microclimate Administration/Government Class B Self-financing of self-government units Class C	Microclimate Social Infrastructure Class D Renturns on tangible assets Class D Productivity of enterprises Class D Investment outlays Class D
Tourism	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class C Social Microclimate Class C Market Microclimate Class B	Microclimate Social Infrastructure Class D Renturns on tangible assets Class F Productivity of enterprises Class F

Microclimate Administration/Government Class B Self-financing of self-government units Class C Investment outlays Class B	
Professional, science and technical activity	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class B Social Microclimate Class C Market Microclimate Class C Microclimate Administration/Government Class A Microclimate Innovativeness Class B Renturns on tangible assets Class B Self-financing of self-government units Class C	Microclimate Social Infrastructure Class D Productivity of enterprises Class E Investment outlays Class D

Source: Authors on the basis of the results of research of the Institute of Enterprise of the Warsaw School of Economics.

Summary

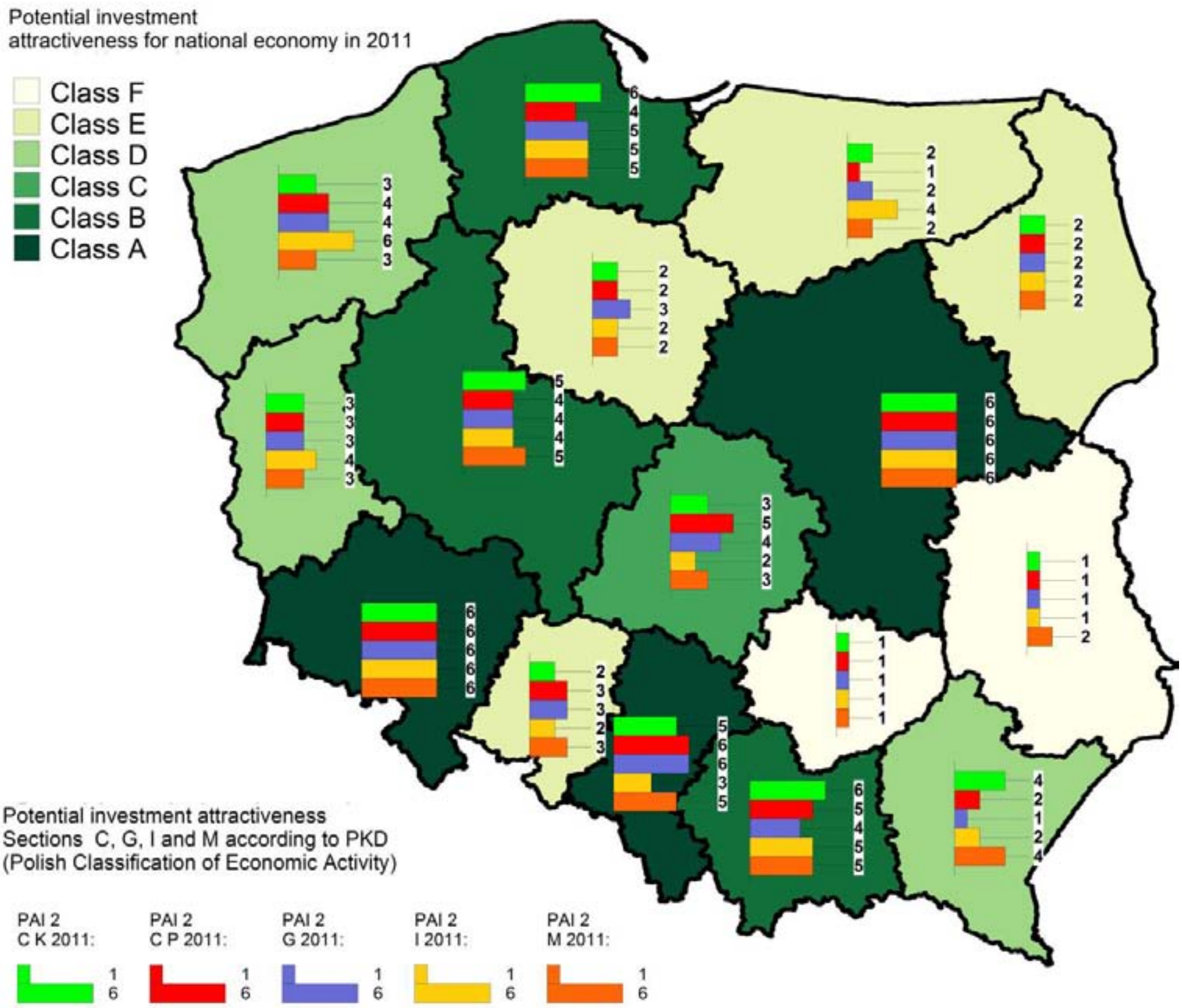
The engines of economic development of Pomeranian voivodship are the city counties: Słupsk, Gdańsk, Gdynia, and land counties: Gdańsk and Puck as well as the special economic zones in the region.

Pomeranian voivodship has predispositions to **create interregional clusters**, especially basing on competitive medium and big enterprises in sectors such as: manufacture of chemicals and chemical products, manufacture of textiles, software and IT services and connected activities. Especially profitable is developing of **offshoring services** (BPO), basing on the competitive enterprises from the sectors: financial services supporting activities, insurances and retirement funds, real estate services, advertising , market research and public opinion polling, software and IT services and connected activities.

The region can also develop **intelligent specializations** basing on competitive medium enterprises in the **middle-tech sector**: manufacture of chemicals and chemical products, and in the **low-tech sector**: manufacture of textiles. The voivodship is also characterized by competitiveness of medium and big enterprises form the high-tech sector: software and IT services and connected activities of **knowledge-based services**, such as advertising, market research and public opinion polling, as well as other knowledge-based services like education.

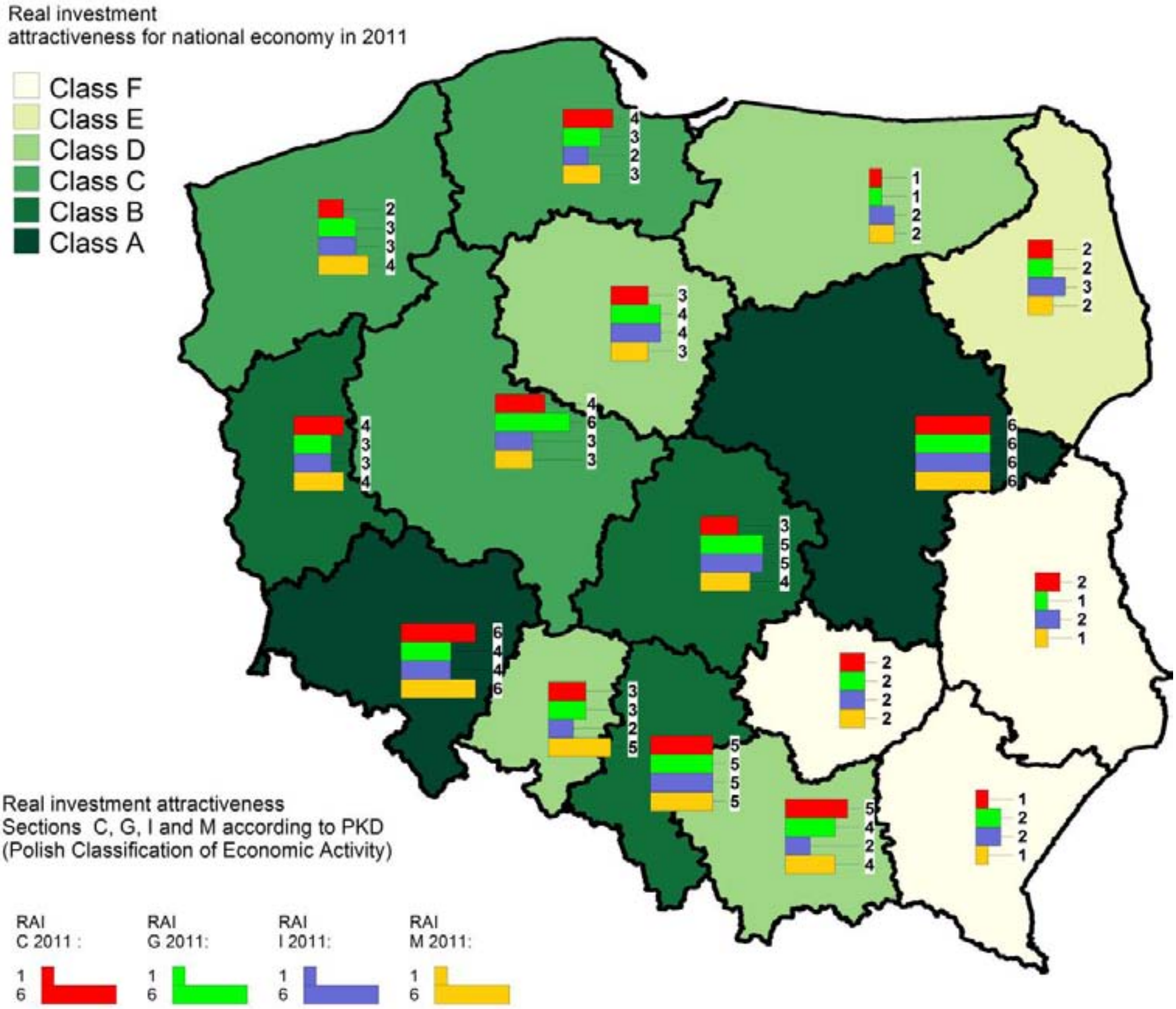
APPENDIX

Chart 1. Potential investment attractiveness of Polish voivodships by basic sections of the national economy



Source: Authors' own materials based on the research.

Chart 2. Real investment attractiveness of Polish voivodships by basic sections of the national economy



Source: Authors' own materials based on the research.

Table 1. List of investment attractiveness indices for voivodships

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

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

Table 2. Potential investment attractiveness of Polish voivodships according to the EU potential investment attractiveness index PAI _UE in 2011

	Microclimate Human Capital	Microclimate Market	Microclimate Innovativeness	Composite index
Lower Silesian	B	D	D	D
Kuyavian-Pomeranian	B	E	F	E
Lublin	B	F	E	F
Lubusz	A	F	E	E
Łódź	A	E	E	E
Lesser Poland	C	E	E	E
Mazovian	A	C	B	B
Opole	C	F	E	F
Subcarpathian	C	F	E	F
Podlaskie	B	F	E	F
Pomeranian	B	D	D	D
Silesian	B	D	E	D
Świętokrzyskie	A	F	F	F
Warmian-Masurian	B	F	E	F
Greater Poland	A	E	E	E
Western Pomeranian	C	E	E	E

Source: Authors' own materials based on calculations of H. Godlewska-Majkowska and M. Czernecki, made in the course of statutory research *Investment attractiveness and enterprise localization in the global economy* (the team: H. Godlewska-Majkowska, Ph.D., university professor at the Warsaw School of Economics – head of research, P. Bartoszczuk, Ph.D., P. Zarębski, Ph.D., M. Typa, M.A., M. Czernecki, M.A.).

Table 3. Potential investment attractiveness of counties of Lower Silesian voivodship for the national economy and selected sections

County	PAI1_GN	PAI1_GN _classes	PAI1_C_ classes	PAI1_G_ classes	PAI1_I_ classes	PAI1_M_ classes
Sopot	0.380	A	A	A	A	A
Gdańsk (city)	0.352	A	A	A	A	A
Słupsk	0.318	A	A	A	B	A
Gdynia	0.314	A	A	A	A	A
Puck	0.290	B	B	B	A	B
Gdańsk	0.287	B	B	B	B	B
Kwidzyn	0.249	C	C	C	C	C
Lębork	0.247	C	D	D	A	C
Wejherowo	0.241	C	D	D	B	C
Nowy Dwór Gdański	0.241	C	D	C	A	D
Człuchów	0.240	C	C	C	B	D

Source: As in Table 1.

Table 4. Potential investment attractiveness of communes of Pomeranian voivodship for the national economy and selected sections

Commune	PAI1_GN	PAI1_GN_ classes	PAI1_C_ classes	PAI1_G_ classes	PAI1_I_ classes	PAI1_M_ classes
Sopot (1)	0.287	A	A	A	A	A
Pruszcz Gdański (1)	0.282	A	A	A	B	A
Gdańsk (1)	0.273	A	A	A	A	A
Tczew (1)	0.273	A	A	A	B	A
Malbork (1)	0.267	A	A	A	B	A
Lębork (1)	0.266	A	A	A	B	A
Starogard Gdański (1)	0.262	A	A	A	B	A
Ustka (1)	0.262	A	A	A	A	A
Słupsk (1)	0.261	A	A	A	B	A
Kwidzyn (1)	0.259	A	A	A	A	A
Wejherowo (1)	0.257	A	A	A	A	A
Puck (1)	0.256	A	A	A	A	A
Gdynia (1)	0.255	A	A	A	A	A
Kosakowo (2)	0.252	A	A	A	A	A
Chojnice (1)	0.250	A	A	A	C	A
Rumia (1)	0.249	A	A	A	B	A
Pruszcz Gdański (2)	0.248	A	A	A	A	A
Jastarnia (1)	0.237	A	A	A	A	B
Władysławowo (1)	0.236	A	A	A	A	A
Krynica Morska (1)	0.233	A	A	A	A	B
Hel (1)	0.231	A	A	A	A	C

Reda (1)	0.230	A	A	A	A	A
Kolbudy (2)	0.230	A	A	A	A	A
Człuchów (1)	0.226	A	A	A	B	A
Kościerzyna (1)	0.224	A	A	A	C	A
Sztutowo (2)	0.223	A	A	A	A	B
Łeba (1)	0.222	A	A	A	A	B
Kobylnica (2)	0.206	B	B	B	A	B
Bytów (3)	0.205	B	B	C	B	B
Puck (2)	0.204	B	C	D	B	B
Rzeczenica (2)	0.203	B	B	B	A	C
Skórcz (1)	0.202	B	B	B	D	B
Lipnica (2)	0.202	B	B	D	C	C
Pszczółki (2)	0.202	B	B	C	D	B
Krokowa (2)	0.202	B	C	C	A	C
Żukowo (3)	0.201	B	B	B	B	B
Słupsk (2)	0.201	B	B	B	B	B
Sztum (3)	0.198	B	C	C	C	B
Nowy Staw (3)	0.197	C	C	B	E	B
Nowy Dwór Gdański (3)	0.196	C	C	C	D	C
Ustka (2)	0.195	C	C	C	A	C
Kościerzyna (2)	0.194	C	C	B	B	D
Gniewino (2)	0.193	C	C	C	B	D
Tczew (2)	0.192	C	C	C	D	B
Czarna Woda (1)	0.189	C	C	C	C	C
Kwidzyn (2)	0.187	C	C	C	D	C
Cedry Wielkie (2)	0.187	C	C	B	C	D
Stężyca (2)	0.185	C	C	C	C	D
Studzienice (2)	0.185	C	C	C	B	C
Stare Pole (2)	0.184	C	C	C	D	C
Kartuzy (3)	0.184	C	C	C	C	C
Przechlewo (2)	0.184	C	C	C	C	C
Prabuty (3)	0.183	C	C	D	D	C
Czarna Dąbrówka (2)	0.182	C	C	C	B	D
Dzierzgoń (3)	0.182	C	D	D	E	C
Koczała (2)	0.180	C	C	C	B	D
Szemud (2)	0.179	C	D	D	C	C
Przodkowo (2)	0.179	C	D	D	D	C
Miastko (3)	0.179	C	C	D	C	C

Source: As in Table 1.

Note: All the indices in the report have been calculated on the basis on the most up-to-date data from the Regional Data Bank (RDB), 2013.