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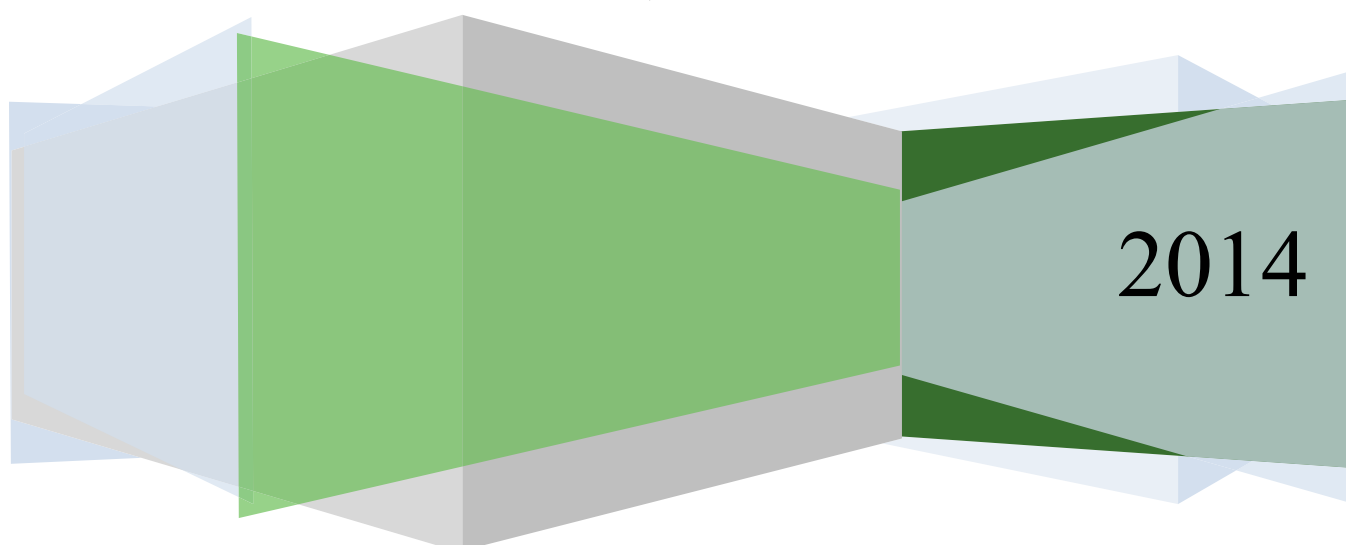


REGIONAL INVESTMENT ATTRACTIVENESS 2014

Kuyavian-Pomeranian Voivodship

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Report prepared for the Polish Information
and Foreign Investment Agency
at the Institute of Enterprise, Warsaw School of Economics
Warsaw, December 2014





Polish Information and Foreign Investment Agency (PAIIZ) is a governmental institution and has been servicing investors since 1992. Its mission is to create a positive image of Poland in the world and increase the inflow of foreign direct investments by encouraging international companies to invest in Poland. PAIIZ is a useful partner for foreign entrepreneurs entering the Polish market. The Agency guides investors through all the essential administrative and legal procedures that involve a project. It also provides rapid access to complex information relating to legal and business matters regarding investments. Moreover, it helps in finding the appropriate partners and suppliers together with new locations.

PAIIZ provides free of charge professional advisory services for investors, including:

- investment site selection in Poland,
- tailor-made investors visits to Poland,
- information on legal and economic environment,
- information on available investment incentives,
- facilitating contacts with central and local authorities,
- identification of suppliers and contractors,
- care of existing investors (support of reinvestments in Poland).

Besides the **OECD National Contact Point**, PAIIZ also maintains an Information Point for companies which are interested in European Funds. All of the Agency's activities are supported by the **Regional Investor Assistance Centres**. Thanks to the training and ongoing support of the Agency, the Centres provide complex professional services for investors at voivodship level.

On the website **www.paiz.gov.pl** an investor can find all the necessary information concerning key facts about Poland, Polish economy, legal regulations in Poland and detailed information which could be useful for any company wanting to set up a business in Poland.

Since 2011 China – Poland Economic Cooperation Centre operates in PAIIZ as a "one-stop shop" providing comprehensive information on investment opportunities in Poland and offering support for Chinese companies during the investment process. The Centre is responsible for: promotion of Poland as a location for FDI, identifying sources of foreign direct investment, supporting the missions and delegations from China, preparing analysis & information, maintaining regular contact with Chinese companies operating in Poland, Go China Project. More information you can find on: **www.gochina.gov.pl**.

Also since 2013 PAIIZ is implementing the **“Go Africa”** program. Its aim is to encourage Polish entrepreneurs to enter the African markets and to promote Poland in Africa. Therefore PAIIZ is organizing: fact finding missions to African countries, participation of Polish entrepreneurs in fairs, conferences, seminars and workshops both in Poland and in Africa. Furthermore the Agency is preparing publications on African markets. More information you can find on: **www.goafrica.gov.pl**.

INTRODUCTION

The report has been prepared to order of the Polish Information and Foreign Investment Agency and is the next edition of the regional investment attractiveness reports. The reports have been published since 2008. They are the result of scientific research conducted since 2002 under the supervision of H. Godlewska-Majkowska, Ph.D., university professor of the Warsaw School of Economics, in the Institute of Enterprise, Collegium of Business Administration of the Warsaw School of Economics. All the authors are the core members of a team that develops methodology of calculating regional investment attractiveness.

The report consists of a few parts. The first part includes the synthetic presentation of the voivodship's economy, including social-economic potential of the voivodship and the level of economic development as well as economy structure. The most important socio-economic data, including information on investment attractiveness, is presented in a table. The first part of the report also presents the position of the voivodship compared to other Polish and European Union regions, paying special attention to the most important industries and high potential sectors.

The second part of the report presents internal diversification of voivodship's investment attractiveness at the levels of counties (Polish: *county*) and communes (Polish: *gmina*). The results of the investment attractiveness calculations for Kuyavian-Pomeranian voivodship's territorial units can be compared to the other territorial units from all of the Polish regions as the calculations have been made for all of them.

In the third part of the report the main business environment institutions in the voivodship are presented, taking into consideration kinds of support which they offer to investors. This part also includes information on location of the Special Economic Zones (SEZs) in the voivodship and information on the results of their activities. The third part of the report is completed by the presentation of the results of the 'A' Commune ranking. The ranking made it possible to point out such communes that are not only attractive for potential investors but also offer them well-prepared information on the Internet.

The report is completed with the Appendix including tables with comparisons of investment attractiveness indices for voivodship's counties and communes. There is also some more detailed information in the Appendix concerning effects of functioning of the Special Economic Zones in the region.

There are two approaches to the investment attractiveness presented in this work. One of them is **potential investment attractiveness**, defined as a set of regional location advantages that influence achieving investors' goals (such as costs of running a business, sales revenues, net return on investment and investment's competitiveness).

Another approach is **real investment attractiveness**, defined as region's ability to create investor's satisfaction and influence absorption of financial and physical capital in form of investments. They can be measured by effectiveness of capital spending.¹

Potential investment attractiveness indices in their simplified version (PAI1) measure the location-specific advantages of regions. 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 indices refer to the whole national economy and to the selected sections: C – manufacturing industry, G – trade and repair, I – tourism and catering, M – professional, scientific and technical services. These sections are the core of the national economy.

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.

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. Real investment attractiveness can be calculated for voivodships, based on the statistical data available on the regional level.

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 Institute of Enterprise at the Warsaw School of Economics (<http://kolegia.sgh.waw.pl/pl/KNoP/struktura/IP/struktura/ZOB/>), as well as in numerous scientific publications and expert opinions.

1. More information on this topic can be found in: *Atrakcyjność inwestycyjna regionów Polski jako źródło przedsiębiorczych przewag konkurencyjnych*, H. Godlewska-Majkowska (ed.), Studia i Analizy Instytutu Przedsiębiorstwa, Oficyna Wydawnicza SGH, Warszawa 2012; H. Godlewska-Majkowska, *Polish regions and their investment attractiveness in the EU*, in: *POLAND Competitiveness Report 2013. National and Regional Dimensions*, M. Weresa (ed.), Oficyna Wydawnicza SGH, Warsaw 2013, pp 299-316.

1. THE PROFILE OF REGIONAL ECONOMY OF KUYAVIAN-POMERANIAN (KUJAWSKO-POMORSKIE) VOIVODSHIP

Kuyavian-Pomeranian (kujawsko-pomorskie) voivodship is situated in the central part of the country. It is renowned for its very well-developed agriculture which has become a foundation of the development of investments in the food industry. Moreover, for industrial traditions and the education system adjusted to the region's needs it is an attractive place for industrial investments.

The advantages of the voivodship are:

- its central location in Poland, where important traffic routes intersect, including lines belonging to the trans-European transport network TEN-T, which facilitates the access to Polish markets and suppliers, both from Poland and abroad,
- a good access to social infrastructure including in particular medical units, sanatoria and health resorts,
- good research and development facilities,
- cultural wealth (numerous monuments among which the Old Town complex of Toruń deserves a note as a UNESCO World Heritage site) and natural conditions (the Kuyavian Lake District and its salt springs) set the foundations for the development of tourism and health services,
- highly developed agriculture, both animal and plant production, both being the foundations of the development of food industry,
- industrial traditions especially in chemical industry, the manufacture means of transport and electronics, which is a factor facilitating the search for contractors as well as higher and vocational education institutions graduates specializing in the fields necessary for the investors in the industry,
- favourable conditions for the development of renewable energy industry,
- the presence of centres supporting the transfer of innovative solutions from the research sector to the industry, e.g. the Centre of Technology Transfer in Toruń.

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

Table 1. General characteristics of the economy of Kuyavian-Pomeranian voivodship

Feature		Kuyavian-Pomeranian voivodship	Poland	Share [%]
Market Potential				
GDP per capita 2012 (PLN/person)		33888.1	41439.1	-
Population (persons) on 31 December 2013		2092564	38495659	5.4%
Human Resources Potential				
Higher education institutions graduates (persons) in 2013		21561	21561	4.7%
Secondary schools graduates (persons) in 2013		454986	454986	5.3%
Number of employed persons in 2013		14256	14256	4.9%
Structure of employed persons in 2013		agriculture 15.4% industry 30.1% services 54.5%		12.0% 30.5% 57.5%
Investment outlays and capital of companies with foreign capital participation in the voivodship				
Investment outlays (PLN m) in 2012		785.0	79942.6	1.0%
Capital of companies (PLN n) in 2012		3129.8	206992.3	1.5%
Special Economic Zones (SEZs) in the voivodship*				
– Pomeranian				
Distinguishing investment attractiveness ratings PAI_2 and RAI (class A, B and C)				
Potential investment attractiveness PAI_2				
Real investment attractiveness RAI		Industry class C		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)				
Counties	Class A	city of Toruń, city of Włocławek, city of Bydgoszcz, city of Grudziądz		
Communes	Class A	Toruń (u), Inowrocław (u), Włocławek (u), Bydgoszcz (u), Grudziądz (u), Chełmża (u), Chełmno (u), Wąbrzeźno (u), Ciechocinek (u), Golub-Dobrzyń (u), Brodnica (u), Osielsko (r), Solec Kujawski (u-r), Świecie (u-r)		

	Class B	Kowal (u), Radziejów (u), Rypin (u), Aleksandrów Kujawski (u), Lipno (u), Białe Błota (r), Łysomice (r), Wielka Nieszawka (r), Janikowo (u-r), Barcin (u-r), Nakło nad Notecią (u-r)
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Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.

PAI – potential investment attractiveness, RAI – real investment attractiveness

* For more information see Table 3 in the Appendix.

Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 2092564 (as of 2013), which is 5.4% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 18.5% of the population at pre-productive age, 63.7% at productive age and 17.8% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 22 higher education institutions in which there are 69486 students studying, which makes up 4.5 % of all students in Poland. Moreover, 7% of the secondary school students in the voivodship attend vocational schools and 5.9% attend technical schools.

The registered unemployment rate in the voivodship amounted to 15.8% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3303.0, which is 87.6% of the average for Poland.

In 2012 Kuyavian-Pomeranian voivodship made a contribution of 4.4% to the GDP of Poland. Calculated per capita, it amounted to PLN 33888.1 with the average for Poland PLN 41439.1. With this result the voivodship takes the 10th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 173.3% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a share of the service sector at the level of 54.5% whereas a share of the agricultural and industrial sectors are respectively 15.4% and 30.1% (Central Statistical Office, Local Data Bank 2014).

In the structure of voivodship's industry important role is played by: manufacture of food products (18% of sold production of the whole voivodship's industry at the end of 2013), manufacture of paper and paper products (13%), manufacture of chemicals and chemical products (11%), manufacture of rubber and plastic products and manufacture of metal products (9% each).

Industrial traditions and favourable location (concerning supplies) made Kuyavian-Pomeranian voivodship the main manufacturer of paper and paper products (20% of the country's sold production in 2013).

The voivodship's position is especially strong among the voivodships specialized in manufacture of chemicals and chemical products (10% of the country's sold production), food products (7%), rubber and plastic products (7%), printing industry, manufacture of metal products and furniture (about 6% each).

When it comes to most of the above-mentioned sectors, the voivodship improved or maintained its competitive position within the last three years (measured by its share in the country's sold production)². It applies to the following sectors:

- manufacture of paper and paper products,
- manufacture of rubber and plastic products,
- manufacture of wood, wood and cork products, except furniture; articles of straw and plaiting materials,
- manufacture of fabricated metal products (except machinery and equipment),
- manufacture of furniture,
- manufacture of machinery and equipment.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: agri-food industry and industries that strengthen voivodship innovativeness and business environment quality.

For the entrepreneurs willing to invest in Kuyavian-Pomeranian voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Kuyavian-Pomeranian voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include electronic, electric machines, chemical and food sectors.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zone: **Pomeranian SEZ, in the following subzones:**

- **Pomeranian SEZ**, subzones: Barcin (u-r), Bydgoszcz (u), Grudziądz (u), Kowalewo Pomorskie (u-r), Łysomice (r), Rypin (u), Świecie (u-r), Toruń (u), Wąbrzeźno (r), Włocławek (u).

² Calculations based on the Statistic Bulletin of the Kuyavian-Pomeranian Voivodship from the 1st quarter of 2014 and Statistical Bulletin, I quarter of 2014, www.stat.gov.pl (10 November 2014). A change of 0.25 percentage point was considered as maintaining competitive position.

In the all above-mentioned locations investors can benefit from tax allowances amounting to 35% - 55%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

2. REGION'S RANK IN TERMS OF INVESTMENT ATTRACTIVENESS IN POLAND AND IN THE EUROPEAN UNION

Kuyavian-Pomeranian voivodship is characterised by a high level of real investment attractiveness, when it comes to industry (class A, RAI index calculated for industry).

In 2012 the accumulated share capital in the companies with foreign capital participation in Kuyavian-Pomeranian voivodship amounted to 1.5% share of its total value in all voivodships. In the years 2003-2011 its market share measured with the value of foreign capital in the above mentioned companies rose from 1.2% to 1.5% which means a slight increase of the voivodship's competitive position.

Based on the methodology prepared by the team of the Enterprise Institute while conducting statutory research in Collegium of Business Administration at the Warsaw School of Economics, calculations of European regions' investment attractiveness have been made for two years. They are based on measurements of attractiveness of human resources, market and innovativeness.³ However, due to different methodology of research and variables taken into account in Poland and EU, results of research are incomparable. This is because not all data are available for voivodships, communes and counties, e.g. not all regions collect current information about the infrastructure.

Based on the above-mentioned indices it can be stated that the voivodship is characterized by a low class of investment attractiveness (class E), compared to the EU regions, taking 219th place of 270 regions, for whom the indices were calculated. However, compared to the previous year, the voivodship increased its position by 14 places. Kuyavian-Pomeranian voivodship has a competitive advantage, when it comes to human capital microclimate, ranked class A, at the 32nd place among all the EU regions.

It is worth mentioning that the voivodship is more attractive than EU regions such as:

³ More on this topic: *Atrakcyjność inwestycyjna regionów Polski na tle Unii Europejskiej*, edited by H. Godlewska-Majkowska, Oficyna Wydawnicza SGH, Warsaw 2014 and <http://kolegia.sgh.waw.pl/pl/KNoP/struktura/IP/struktura/ZOB/>

- **in Bulgaria:** Severoiztochen, Yugoiztochen, Severen tsentralen, Yuzhen tsentralen, Severozapaden;
- **in Greece:** Kentriki Makedonia, Kriti, Notio Aigaio, Thessalia, Ipeiros, Dytiki Ellada, Sterea Ellada, Ionia Nisia, Dytiki Makedonia, Voreio Aigaio, Peloponnisos, Anatoliki Makedonia, Thraki;
- **in Spain:** Castilla-La Mancha, Región de Murcia, Extremadura;
- **in Portugal:** Algarve, Norte, Alentejo, Região Autónoma dos Açores, Centro;
- **in Romania:** Vest, Nord-Vest, Centru, Sud-Est, Nord-Est, Sud-Vest Oltenia, Sud - Muntenia;
- **in Slovakia:** Stredné Slovensko, Východné Slovensko;
- **in Hungary:** Dél-Dunántúl, Észak-Magyarország, Dél-Alföld, Észak-Alföld;
- **in Italy:** Molise, Sardegna, Sicilia, Puglia, Calabria, Basilicata.

3. INTERNAL DIVERSIFICATION OF REGIONAL INVESTMENT ATTRACTIVENESS

Investment attractiveness of the particular administrative units in the voivodship is the result of how investors assess conditions of conducting business that are important for them. These conditions include labour market, technical infrastructure, market and natural conditions.

Labour market assessment gives investor the information on opportunities to recruit the right employees for their companies and labour surpluses or shortages, which indirectly influences costs of hiring workers.

Technical infrastructure assessment allows entrepreneurs to plan their investments that need preparing of investment plot equipped with the basic technical elements such as water, gas and electric installations and environment protection equipment such as sewage farms.

Social infrastructure is rated as equipment of a place where the investment is to be located with facilities influencing citizens' life quality and human resources development. These facilities provide the citizens with access to education, healthcare, sports and recreation facilities or information technologies such as Internet.

Market conditions informs on market absorptive power that means the number of potential customers and indirectly on their wealth that means ability to buy goods and services. Environment conditions were rated as they are a basic factor influencing tourism development and citizens' life quality.

The composite assessment of all the above-mentioned elements in particular counties or communes shows spatial differentiation of investment attractiveness in the voivodship. What is more, calculations for particular sectors of economy are presented such as industry, trade and modern services connected with professional, scientific and technical activities are

presented (Chart 3 and Chart 4). The distinguished locations presented on the map are marked with stars that indicate highest marks for the above-mentioned areas of conducting business.

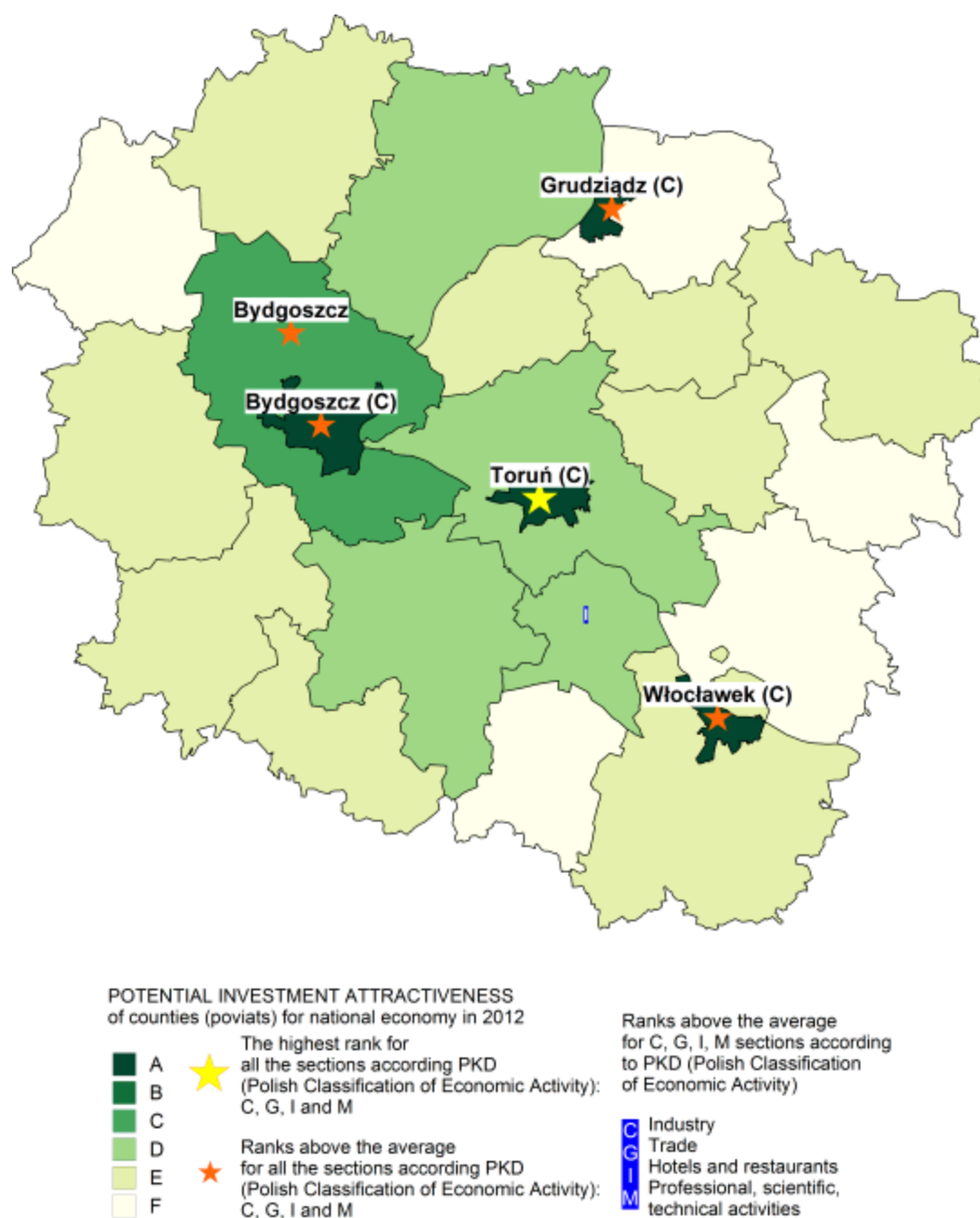
An **orange star** means that a county or a commune was rated above average in all the sections analysed (national economy, industry, trade, tourism and professional services) and the **golden star** is the highest distinction and means that all the rated sections in a particular commune or county were ranked at the highest level.

When it comes to counties, the highest ranked city county was the city of Toruń (distinguished with a golden star), land county Bydgoszcz and city counties: Bydgoszcz, Grudziądz and Włocławek.

When it comes to urban communes, the highest ranked of them were:

- **distinguished with a golden star:** Chełmno (u), Ciechocinek (u), Toruń (u)
- **distinguished with an orange star:** Brodnica (u), Bydgoszcz (u), Golub-Dobrzyń (u), Grudziądz (u), Inowrocław (u), Wąbrzeźno (u) and Włocławek (u).

Chart 3. Potential investment attractiveness of counties of Kuyavian-Pomeranian voivodship, considering the most attractive sections

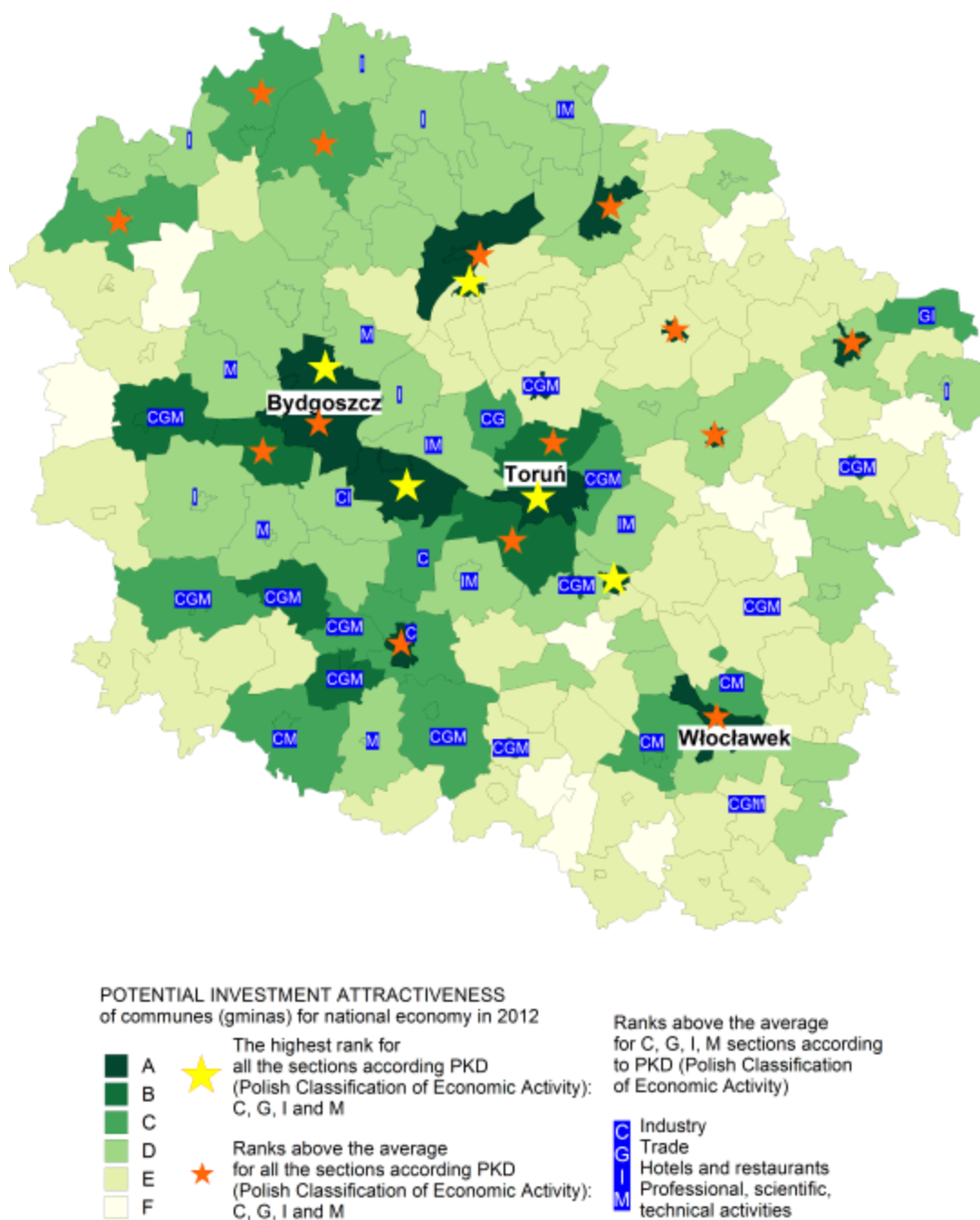


Golden star county:

Toruń

Source: Authors' own work.

Chart 4. Potential investment attractiveness of communes of Kuyavian-Pomeranian voivodship, considering the most attractive sections



Golden star communes:

Chełmno (u), Ciechocinek (u), Osielsko (r), Solec Kujawski (u-r), Toruń (u)

Source: Authors' own work

Among rural communes the highest rank communes include:

- **golden star communes:** Osielsko (r) and
- **orange star communes:** Białe Błota (r), Cekcyn (r), Łysomice (r), Wielka Nieszawka (r).

Among urban-rural communes the highest rank communes include:

- **golden star communes:** Solec Kujawski (u-r) and
- **orange star communes:** Sępólno Krajeńskie (u-r), Świecie (u-r) and Tuchola (u-r).

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.

4.1. BUSINESS ENVIRONMENT INSTITUTIONS

Among business environment institutions (excluding R&D institutions) that influence region's economic development are: chambers of commerce, associations, business incubators, technology parks, technology transfer centres, consulting centres, financial institutions and development agencies.

For the investors especially important is a system of regional Investor Assistance Centres set up by the Polish Information and Foreign Investment Agency in consultation with voivodships' marshals to ensure complex services for investors in each voivodship.

In Kuyavian-Pomeranian voivodship such centre is:

the **Investor Assistance Centre** operating within
Marshal Office of Kuyavian-Pomeranian Voivodship
www.coi.kujawsko-pomorskie.pl



Kuyavian-Pomeranian Investor Assistance Centre is a partner of the Polish Information and Foreign Investment Agency and a one stop shop: a source of regional information that are

useful for investors, legal acts, investment offers and current data on region's economy. The personnel of the centre have qualifications to offer services for investors and are working according to the standards set by the Polish Information and Foreign Direct Investment Agency, which offers it substantive help and trainings.

An important tool supporting investors are the Special Economic Zones, which are described in the further part of this report.

Below some chosen business environment institutions are presented that operate for entrepreneurship development by supporting development of new technologies and cooperation of enterprises.

These institutions are among others:

Kuyavian-Pomeranian Voivodship Chamber of Commerce (*Izba Przemysłowo-Handlowa Województwa Kujawsko-Pomorskiego w Bydgoszczy*) (www.iph.bydgoszcz.pl)

The chamber helps its members to find trade partners (databases on Polish and foreign manufacturers, traders and service providers), free of charge legal advisory, business intelligence services, promotion services (like publishing catalogues presenting companies), training services. The chamber cooperates with partners from all continents which facilitates flows of information and trade offers. It organizes trade missions that aim at increasing markets opportunities for its members and starting cooperation with foreign partners..

Chamber of Industry and Commerce in Toruń (*Izba Przemysłowo-Handlowa w Toruniu*) (www.iph.torun.pl)

The chamber is an organization of economic self-government. Its members are companies from Kuyavian-Pomeranian voivodship. The aim of the chamber is to represent its members towards region's authorities and increasing the level of region's economic development and its attractiveness for business and local communities. The most important tasks of the chamber include: promotion of its member companies and promoting region's advantages for investors and tourists both in Poland and abroad, lobbying, raising EU funds. The chamber offers its members training services and economic, legal and organizational advisory within projects financed from EU funds.

Business Centre Club – Bydgoszcz Chamber, Toruń Chamber (www.bcc.org.pl)

BCC is an organization of entrepreneurs and individual employers. It lobbies for development of free market economy, legal regulations and interests of Polish entrepreneurs. BCC represents interests of employers in numerous bodies lobbying or deciding on relations between employers and employees such as Trójstronna Komisja ds. Społeczno-Gospodarczych, Wojewódzkie Komisje Dialogu Społecznego, Rady Zatrudnienia (in counties and voivodships), Rada Ochrony Pracy, Fundusz Gwarantowanych Świadczeń Socjalnych, Naczelna Rada Zatrudnienia. BCC is an initiator of Dialogue Forum (communication platform for different social groups) and promotes the idea of Corporate Social Responsibility.

Bydgoszcz Industrial and Technological Park (*Bydgoski Park Przemysłowo-Technologiczny*) (www.bppt.pl)

The park is located in the South-East Part of Bydgoszcz in the post-industrial area and takes 286 ha. The whole area is included in the Local Spatial Development Plan (the areas are appointed for services, production and storage. A part of this area of about 46 ha was brought into the Pomeranian Special Economic Zone. The park offers i.a. investment plots equipped with modern infrastructure (more than 60 ha of free investment areas), choice of locations and splitting plot in accordance with investors' requirements. The park has a direct connection with the national road number 10. It also offers plots near the airport and inland port, direct access to railway transport. It supports companies in fulfilling administrative procedures and accessing metropolitan labour market.

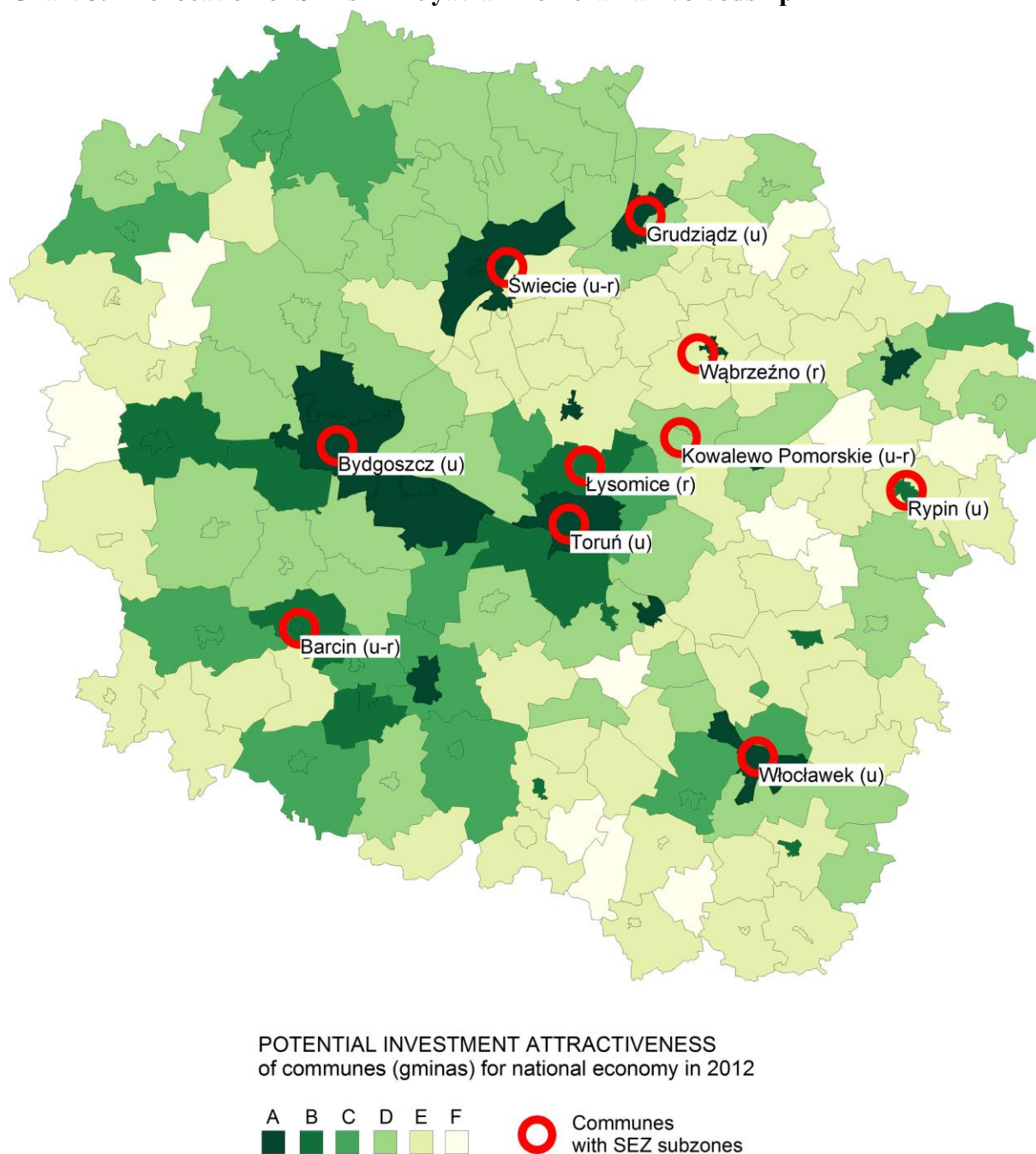
Toruń Technology Park (*Toruński Park Technologiczny*) (www.technopark.org.pl)

The offer of the park includes i.a. renting office space and conference rooms as well as possibility of buying or leasing investment plots. The plots are equipped with complex technical and road infrastructure and the area of the park is included into the Local Spatial Development Plan and all the whole area of the park has clear legal status. The investors are offered support concerning seeking for funds and know-how. They also can use park's facilities. Exea Data Centre was to be opened in 2013 which is a centre of data processing, designed for use of Cloud Computing solutions. The park offers support for innovative projects and training and consulting services. It also organizes international business meetings of companies (cooperation exchange forums and trade missions) that activate companies' trade and technology cooperation.

4.2. SPECIAL ECONOMIC ZONES IN THE VOIVODSHIP – EFFECTS

There is one SEZ operating in the voivodship: Pomeranian Special Economic Zone. At the end of 2013 the areas of the SEZ were parts of 5 cities and 5 communes – see Chart 5.

The Pomeranian SEZ was created in 2006. Till the end of 2013 the enterprises operating in the Pomeranian SEZ's subzones have invested PLN 2.8 bln in this area which is 3% of all investment outlays in the Polish SEZs. In the same time the enterprises created 1.9 thousand new jobs in the region, which was 1% of all new jobs created in the Polish economic zones - see Table 3 in the Appendix.

Chart 5. The location of SEZs in Kuyavian-Pomeranian voivodship

Source: Authors' own work.

The most effective subzone is Świecie with two paper companies operating there: MONDI ŚWIECIE S.A. and MONDI CORRUGATED ŚWIECIE Sp. z o.o., both operating in paper industry. The above mentioned localizations have strong industrial traditions related to the industries concerned and the subzones operating there allowed to strengthen their roles on the regional investment map.

The second most effective was Łysomice subzone that attracted Japanese capital, which invested in electronic industry. The investors in Łysomice subzone are: SHARP

MANUFACTURING POLAND Sp. z o.o., ORION ELECTRIC (POLAND) sp. z o.o., POLAND TOKAI OKAYA MANUFACTURING Sp. z o.o., SOHBI CRAFT Poland Sp. z o.o., SUMIKA ELECTRONIC MATERIALS Poland Sp. z o.o., KIMOTO Poland Sp. z o.o., TENSHO Poland Sp. z o.o., U-TEC Poland Sp. z o.o., Yusen Logistics (Polska) Sp. z o.o. (former NYK Logistics Polska sp. z o.o.), Nissin Logistics Poland Sp. z o.o., NIPPON EXPRESS GmbH Sp. z o.o., APATOR S.A., MANUFACTURING sp. z o.o. The 179 ha of Łysomice subzone now houses a cluster of Japanese electronics industry companies, called Crystal Park.

Other subzones have attracted considerably lower amount of capital. Schumacher Packaging Zakład Grudziądz Sp. z o.o. (formerly POLPAK PAPIER sp. z o.o) and WTECH sp. z o.o. have invested in Grudziądz, Plastica Sp. z o.o. in Kowalewo Pomorskie, Lafarge Cement S.A. and Mapei Polska Sp. z o.o. in Barcin, and Airon Investment Anna Niemczewska, Baumat Sp. z o.o. and METALBARK PPU Zbigniew Barłóg in Bydgoszcz.

According to the Pomeranian SEZ development plan, the voivodship intends to acquire the following kinds of investors:

- investors from innovative services sector,
- investors from machine industry,
- investors from electronic industry,
- investors from food processing industry,
- investors from the sectors that should create jobs in branches for which the voivodship has abundant human resources.

4.3. '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 (using *mystery client* method). 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 2012 index were subject to evaluation.

As a result 59 communes were distinguished, of which 3 are situated in Kuyavian-Pomeranian voivodship: Toruń (u), Bydgoszcz (u), Włocławek (u). The distinguished communes offer complex services for investors with the use of electronic communication tools. All of the above-mentioned communes have complex websites, including i.a. descriptions of free investment plots. What is more, each of the communes answered both e-mails in Polish and in English. Two answers: Toruń's answer to the Polish message and Bydgoszcz's answer to the

English message can be considered as model. Both Bydgoszcz and Włocławek were awarded the 'A' Commune title once again.

APPENDIX

Table 1. POTENTIAL INVESTMENT ATTRACTIVENESS OF POLISH VOIVODSHIPS FOR THE NATIONAL ECONOMY AND ITS SELECTED SECTIONS

Voivodship	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
	National economy	National economy	Industry	Trade	Hotels and restaurants	Professional, scientific and technical activities
Voivodships						
LOWER SILESIAN	0.39	A	A	A	B	A
KUYAVIAN-POMERANIAN	0.29	C	C	E	D	D
LUBLIN	0.17	F	F	F	F	F
LUBUSZ	0.23	E	E	D	C	D
ŁÓDŹ	0.29	C	C	D	E	D
LESSER POLAND	0.32	C	C	B	B	C
MAZOVIAN	0.40	A	A	A	A	A
OPOLE	0.22	E	E	D	E	D
SUB-CARPATHIAN	0.23	E	E	E	E	D
PODLASKIE	0.20	F	F	F	E	E
POMERANIAN	0.34	B	C	B	A	B
SILESIAN	0.41	A	A	B	C	A
ŚWIĘTOKRZYSKIE	0.16	F	F	F	F	F
WARMIAN-MAZURIAN	0.24	E	E	C	C	E
GREATER POLAND	0.31	C	C	C	D	B
WESTERN POMERANIAN	0.34	B	B	B	A	B

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 COUNTIES OF KUYAVIAN-POMERANIAN VOIVODSHIP FOR THE NATIONAL ECONOMY AND SELECTED SECTIONS

County	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
	National economy	National economy	Industry	Trade	Hotels and restaurants	Professional, scientific and technical activity
Counties						
Toruń	0.365	A	A	A	A	A
Włocławek	0.338	A	A	A	B	A
Bydgoszcz	0.319	A	A	A	C	A
Grudziądz	0.317	A	B	A	C	A
Bydgoszcz	0.262	C	C	C	C	C

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

Table 3. POTENTIAL INVESTMENT ATTRACTIVENESS OF COUNTIES OF KUYAVIAN-POMERANIAN VOIVODSHIP FOR THE NATIONAL ECONOMY AND SELECTED SECTIONS

Commune	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
	National economy	National economy	Industry	Trade	Hotels and restaurants	Professional, scientific and technical activity
Urban communes						
Toruń (u)	0.275	A	A	A	A	A
Inowrocław (u)	0.271	A	A	A	C	A
Włocławek (u)	0.259	A	A	A	B	A
Bydgoszcz (u)	0.257	A	A	A	B	A
Grudziądz (u)	0.255	A	A	A	C	A
Chelmża (u)	0.254	A	A	A	D	A
Chelmno (u)	0.250	A	A	A	A	A
Wąbrzeźno (u)	0.247	A	A	A	C	A
Ciechocinek (u)	0.244	A	A	A	A	A
Golub-Dobrzyń (u)	0.241	A	A	A	B	A
Brodnica (u)	0.231	A	A	A	C	A
Kowal (u)	0.215	B	A	B	D	A
Radziejów (u)	0.214	B	B	B	E	B
Rypin (u)	0.213	B	B	B	D	A
Aleksandrów Kujawski (u)	0.212	B	B	B	D	A
Lipno (u)	0.201	B	B	C	D	B
Rural communes						
Osielsko (r)	0.237	A	A	A	A	A
Białe Błota (r)	0.209	B	B	C	A	B
Łysomice (r)	0.206	B	B	C	B	C
Wielka Nieszawka (r)	0.205	B	B	C	A	B
Fabianki (r)	0.194	C	C	D	D	C
Lubicz (r)	0.192	C	C	C	D	C
Cekcyn (r)	0.192	C	C	C	C	C
Łubianka (r)	0.190	C	C	C	D	D
Inowrocław (r)	0.183	C	C	D	D	D
Rojewo (r)	0.183	C	C	E	E	D
Brzozie (r)	0.182	C	D	C	B	E
Urban-rural communes						
Solec Kujawski (u-r)	0.247	A	A	A	A	A
Świecie (u-r)	0.223	A	A	B	B	A

Janikowo (u-r)	0.212	B	B	B	D	B
Barcin (u-r)	0.211	B	B	B	D	B
Nakło nad Notecią (u-r)	0.202	B	C	C	D	B
Tuchola (u-r)	0.196	C	C	C	C	B
Mogilno (u-r)	0.193	C	C	D	E	C
Żnin (u-r)	0.191	C	C	C	D	C
Kruszwica (u-r)	0.191	C	C	C	E	C
Sępólno Krajeńskie (u-r)	0.191	C	C	C	C	C
Pakość (u-r)	0.189	C	C	C	D	C
Brześć Kujawski (u-r)	0.184	C	C	D	E	C

(u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune

Source: As for Table 1.

Note: All the indices in the report have been calculated on the basis on the most up-to-date data from the Local Data Bank (RDB), 2014.

Table 4. EFFECTS OF SPECIAL ECONOMIC ZONES FUNCTIONING AT THE END OF 2013

SEZ	County, commune	Cumulated capital expenditure in million PLN (end of 2013)	New jobs number (end of 2013)	Leading industries (at least 20% share of revenue or employment)
Pomeranian	Świecie (u-r) Świecie	1 322.47	189	paper and paper products
Pomeranian	Żnin (u-r) Barcin	285.57	122	other non-metallic mineral products
Pomeranian	city of Bydgoszcz (u) Bydgoszcz	191.25	80	paper and paper products, fabricated metal products (except machinery and equipment)
Pomeranian	Golub-Dobrzyń (u-r) Kowalewo Pomorskie	327.14	878	paper and paper products, rubber and plastic products
Pomeranian	Rypin (u) Rypin	2.19	0	food products
Pomeranian	Toruń (r) Łysomice	504.15	543	rubber and plastic products, metals, computers, electronic and optical products
Pomeranian	Wąbrzeźno (r) Wąbrzeźno	0.41	0	machinery and equipment n.e.c.
Pomeranian	city of Grudziądz (u) Grudziądz	123.38	123	paper and paper products
Pomeranian	city of Toruń (u) Toruń	0.00		no leading industry
Pomeranian	city of Włocławek (u) Włocławek	52.40	10	chemicals and chemical products

Source: Authors' own calculations based on the Ministry of Economy data. Notice: (u) – city commune, (u-r) urban-rural commune, (r) rural commune.