Warsaw School of Economics

REGIONAL INVESTMENT ATTRACTIVENESS 2014

Pomeranian Voivodship

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Invest in Poland
POLISH INFORMATION AND FOREIGN INVESTMENT AGENCY

Polska

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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 the 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 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 characterized 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.

- little 'Silicon Valley' being created in the suburbs 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 first in the world Museum of Amber 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 2012 (PLN/person)	39759,4	41439,1	-
Population (persons) on 31 December 2013	2295811	38495659	6,0%
Human Resources Potential			
Higher education institutions graduates (persons) in 2013	28064	454986	6,2%
Secondary schools graduates (persons) in 2013	15215	271333	5,6%
Number of employed persons in 2013	894	15568	5,7%
Structure of employed persons in 2013	agriculture 7,1% industry 31,0% services 61,9%	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	2616,7	79942,6	3,3%
Capital of companies (PLN n) in 2012	15837,1	206992,3	7,7%
Special Economic Zones (SEZs) in the voivodship			
– **Pomeranian** – **Słupsk**			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	The national economy class B Capital-intensive industry class B Industry laborious class B Business class B Tourism class A Education class B		
Real investment attractiveness RAI	The national economy class C Industry class C Business class C Professional scientific and technical activity class C		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	class A	city of Sopot, city of Gdańsk, city of Słupsk, city of Gdynia	

	class B	Puck, Gdańsk
Communes	class A	Sopot (u), Tczew (u), Pruszcz Gdański (u), Gdańsk (u), Krynica Morska (u), Malbork (u), Lębork (u), Słupsk (u), Chojnice (u), Puck (u), Starogard Gdański (u), Wejherowo (u), Kwidzyn (u), Ustka (u), Gdynia (u), Rumia (u), Władysławowo (u), Jastarnia (u), Reda (u), Łeba (u), Kościerzyna (u), Człuchów (u), Kosakowo (r), Pruszcz Gdański (r), Kolbudy (r)
	class B	Hel (u), Skórcz (u), Ustka (r), Sztutowo (r), Kobylnica (r), Starogard Gdański (r), Słupsk (r), Kościerzyna (r), Żukowo (u-r), Bytów (u-r)

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 2295811(as of 2013), which is 6.0% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 19.5% of the population at pre-productive age, 63.4% at productive age and 17.1% 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 27 higher education institutions in which there are 101914students studying, which makes up 6.6 % of all students in Poland. Moreover, 7.2% of the secondary school students in the Pomeranian voivodship attend vocational schools and 5.8% attend technical schools.

The registered unemployment rate in the voivodship amounted to 11.3% 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 3906.6, which is 103.6% of the average for Poland.

In 2012 Pomeranian voivodship made a contribution of 5.7% to the GDP of Poland. Calculated per capita, it amounted to PLN 39759.4 with the average for Poland PLN 41439.1. With this result the voivodship takes the 5th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 192.4% 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 service sector at the level of 61.9% whereas a share of the agricultural and industrial sectors are respectively 7.1% and 31% (Central Statistical Office, Local Data Bank 2014).

In the structure of voivodship's industry important role is played by: manufacture of food products (10% of the value of sold production of industry all over the region at the end of 2013), manufacture of computer, electronic and optical products (7%), the supply of electricity, gas and water (7%) and manufacture of metal products (6%).

As a coastal region Pomeranian voivodship has a significant share of the national output section "Manufacture of other transport equipment". This share amounted in 2013 to 20%.

The Pomeranian voivodship's position is especially strong among the voivodships in:

- manufacture of computer, electronic and optical products (17%),
- manufacture of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials (7%),
- manufacture of fabricated metal products, except machinery and equipment (7%),
- machinery and equipment (6%).

When it comes to most of the above-mentioned sectors, the Pomeranian 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 products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials,
- food production,
- manufacture of other non-metallic mineral products,
- manufacture of fabricated metal products, except machinery and equipment,
- production of computers, electronic and optical products,
- manufacture of electrical equipment,
- manufacture of motor vehicles, trailers and semi-trailers, excluding motorcycles,
- manufacture of furniture.

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: high-tech, logistics, maritime, tourism, agri-food sector.

For the entrepreneurs willing to invest in 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 Pomeranian voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include:

- BPO / SSC / BSS,
- energy,

[2] Calculations based on the Statistic Bulletin of the 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.

- ICT ,
- logistics,
- chemistry,
- automotive.

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: Chojnice (r), Człuchów (r), Gdańsk (u), Gdynia (u), Gniewino (r), Krokowa (r), Kwidzyn (u), Malbork (u), Starogard Gdański (u), Sztum (u-r), Tczew (u), Tczew (r)
- **Słupsk SEZ** subzones: Debrzno (u-r), Słupsk (u), Słupsk (r), Ustka (u), Żukowo (u-r)

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

Pomeranian voivodship is characterized 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).

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). Potential and real investment attractiveness is reflected in the decisions of investors on business location.

This is reflected in the fifth place of voivodship in Poland in terms of the share capital of entities with foreign capital, thanks to the acquisition of 7.7% of the inflow (based on data for the year 2012).

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]

Pomeranian voivodship is the second in terms of investment attractiveness of the region in Poland in the European Union regions. Pomeranian voivodship can be classified on the 148 items of 270 European regions. Relative to the previous study Pomeranian voivodship improved its position by one place and still retains an assessment of the investment attractiveness of a level D, which is not significantly below the EU average.

The strongest part of the Pomeranian voivodship is microclimate human capital (class B), in which the region was classified on the 68th place.

Due to different methodology of research and variables taken into account for regions in Poland only and regions in the EU, the results of research are incomparable. This is because not all data are available for all the regions, e.g. data on infrastructure.

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

- **in Austria:** Niederösterreich, Burgenland;
- **in Belgium:** Prov. Luxembourg;
- **in Bulgaria:** Severoiztochen, Yugoiztochen, Severen tsentralen, Yuzhen tsentralen, Severozapaden;
- **in Britain:** South Yorkshire, Shropshire and Staffordshire, Tees Valley and Durham, Highlands and Islands, Cumbria, East Yorkshire and Northern Lincolnshire, West Wales and The Valleys, Cornwall and Isles of Scilly, Lincolnshire;
- **in Czech:** Severovýchod, Jihozápad, Moravskoslezsko, Strední Morava, Severozápad;
- **in Denmark:** Sjælland, Nordjylland;
- **in France:** Guyane, Languedoc-Roussillon, Franche-Comté, Lorraine, Auvergne, BaSEZ-Normandie, Limousin, Bourgogne, Champagne-Ardenne, Poitou-Charentes, Picardie;
- **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 y León, Galicia, Comunidad Valenciana, Ciudad Autónoma de Ceuta, Andalucía, Illes Balears, Canarias, Castilla-La Mancha, Región de Murcia, Extremadura;
- **in Netherlands:** Friesland, Drenthe;
- **in Lithuana:** Lietuva;
- **in Latvia:** Latvija;
- **in Germany:** Thüringen, Koblenz, Oberpfalz, Schwaben, Schleswig-Holstein, Münster, Chemnitz (NUTS 2006), Niederbayern, Weser-Ems, Sachsen-Anhalt, Lüneburg;

[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 Portugal:** Região Autónoma da Madeira, Algarve, Norte, Alentejo, Região Autónoma dos Açores, Centro;
- **in Romania:** Vest, Nord-Vest, Centru, Sud-Est, Nord-Est, Sud-Vest Oltenia, Sud – Muntenia;
- **słowackie:** Západné Slovensko, Stredné Slovensko, Východné Slovensko;
- **in Slovenia:** Vzhodna Slovenija,
- **in Hungary**: Nyugat-Dunántúl, Közép-Dunántúl, Dél-Dunántúl, Észak-Magyarország, Dél-Alföld, Észak-Alföld;
- **in Italy:** Toscana (NUTS 2006), Friuli-Venezia Giulia (NUTS 2006), Valle d'Aosta/Vallée d'Aoste, Marche (NUTS 2006), Campania, Abruzzo, Umbria (NUTS 2006), 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.

In order to assess the attractiveness of the location of tourist services and their derivatives were evaluated **natural conditions**, which are also an important element in shaping the quality of life of residents.

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.

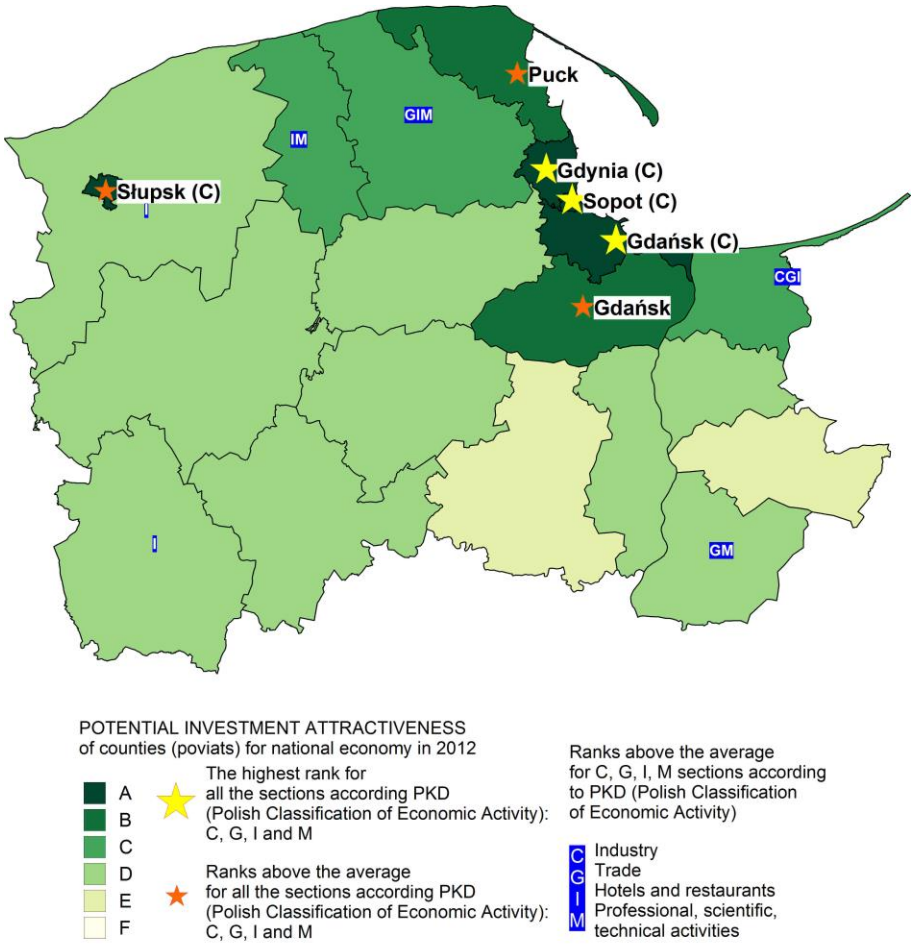
When it comes to counties, the highest ranked city counties were: Gdańsk Gdynia Sopot land counties (distinguished with orange star) are: Gdańsk, Puck and city county Słupsk.

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

- **distinguished with a golden star:** Gdańsk (u), Gdynia (u), Krynica Morska (u), Kwidzyn (u), Pruszcz Gdański (u), Puck (u), Reda (u), Rumia (u), Sopot (u), Ustka (u), Wejherowo (u), Władysławowo (u),

- **distinguished with an orange star:** Chojnice (u), Czarna Woda (u), Człuchów (u), Hel (u), Jastarnia (u), Kościerzyna (u), Lębork (u), Łeba (u), Malbork (u), Słupsk (u), Starogard Gdański (u), Tczew (u).

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

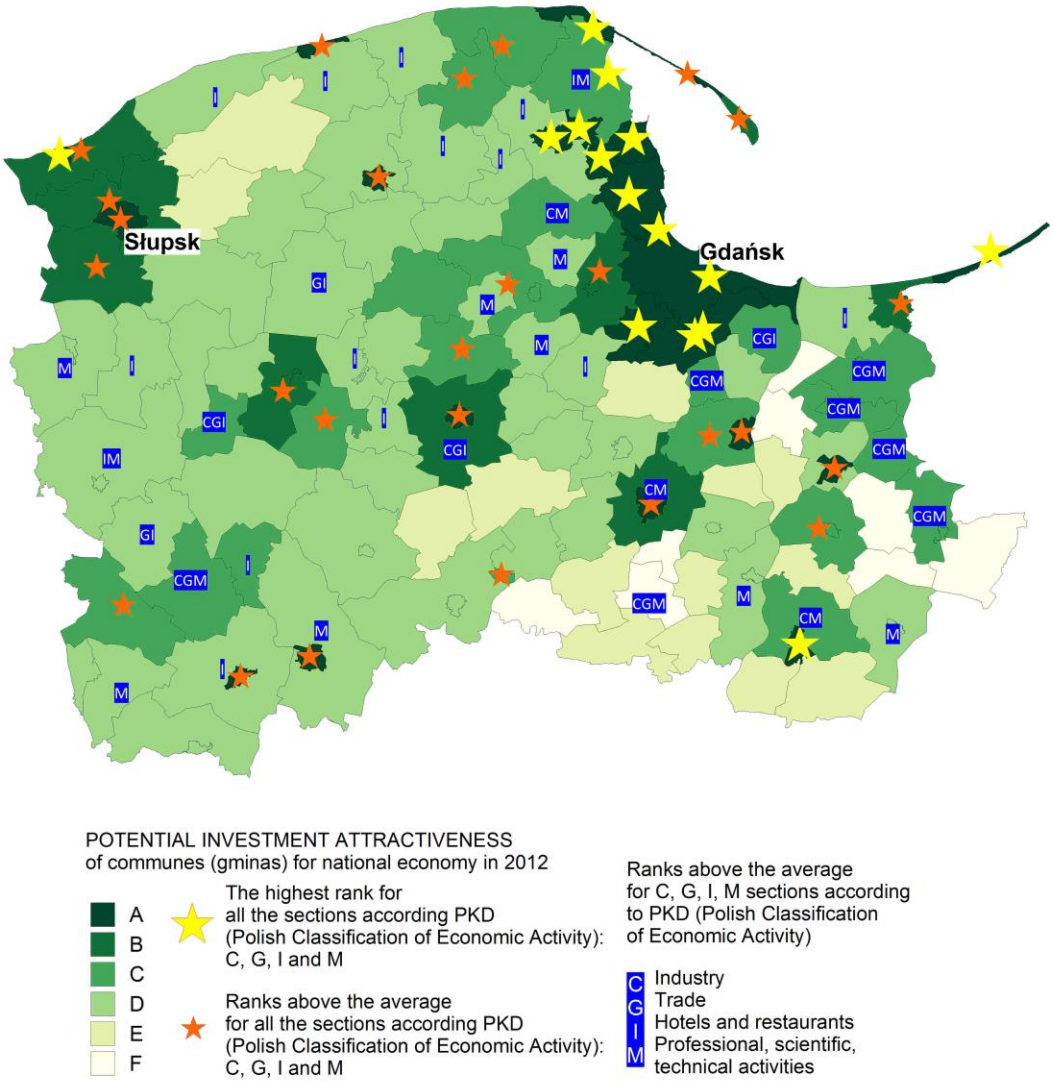


Golden star counties:

Gdynia, Sopot, Gdańsk

Source: Authors' own work.

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



Golden star communes

Gdańsk (u), Gdynia (u), Kolbudy (r), Kosakowo (r), Krynica Morska (u), Kwidzyn (u), Pruszcz Gdański (u), Pruszcz Gdański (r), Puck (u), Reda (u), Rumia (u), Sopot (u), Ustka (u), Wejherowo (u), Władysławowo (u)

Source: Authors' own work.

Among rural communes the highest rank communes include:

- **golden star communes:** Kolbudy (r) Kosakowo (r) Pruszcz Gdański (r),
- **orange star communes**: Gniewino (r), Kobylnica (r), Krokowa (r), Rzeczenica (r), Słupsk (r), Stężyca (r), Studzienice (r), Sztutowo (r), Tczew (r), Ustka (r).

Among urban-rural communes the highest rank communes include:

- **orange star communes:** Bytów (u-r), Kartuzy (u-r), Sztum (u-r), Żukowo (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 SUPPORTING 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 Pomeranian voivodship such centre is:

Investor Assistance Centre operating within the structure of Pomerania Development Agency
www.investinpomerania.pl

Invest in Pomerania

Pomeranian Assistance Service 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:

Pomeranian Regional Chamber of Commerce *(www.rigp.pl)*
The Chamber is an organization of economic self-associating voluntary entrepreneurs operating in Pomeranian West Pomeranian, Warmian and Mazurian, Kuyavian-Pomeranian and Greater Poland. The tasks of the Chamber are: representing and protecting the economic interests of members, in particular to the state authorities, networking, exchange of experience with domestic and foreign business organizations, developing and promoting ethics in business, expressing opinions on draft laws concerning the activities of activity and participation in the drafting of legislation in this area. The Chamber provides assistance in liaising with foreign and domestic companies.

Business Centre Club – Gdansk Lodge *(www.bcc.org.pl)*
BCC is an organization of business and individual employers. Business Centre Club conducts active lobbying economic development of free market economy, the creation of law, protecting the interests of Polish entrepreneurs. BCC represents the interests of employers through participation in various committees, including the Trilateral Commission. Socio-Economic, Social Dialogue Committees Provincial, regional and district Boards of Employment, Labour Protection Council, Guaranteed Social Fund and the Supreme Council of Employment. BCC is the initiator of the Forum for Dialogue (plane communicate different social groups) and the promoter of the idea of corporate social responsibility (CSR).

Transfer Technology Centre in Gdańsk *(www.cttinfo.pl/)*
The aim of the centre is to create a bridge between innovative scholars, inventors, designers, ideas and industry, especially SMEs. Task of the Centre are.: organization and implementation processes of technology transfer, promotion and commercialization of scientific achievements through the implementation of its results into practice, inspiring and supporting business initiatives, promoting entrepreneurship and application of innovative solutions that help in establishing scientific and

economic international cooperation , create a database of business entities seeking business partners or technology.

Industry and Technology Park in Kwidzyń *(http://www.kppt.pl/)*
The park was created on the initiative of local government institutions in order to create the infrastructure for the development of innovative companies, in particular, working in the field of renewable energy sources (RES). The offer includes : information and advisory services, assistance in obtaining funds from the European Union, assistance in finding foreign business partners. The park offers investment areas (planned to include investment areas KPPT the Pomeranian Special Economic Zone) and the surfaces prepared to operate office equipment, office - service, production and storage, as well as providing office services.

Science and Technology Park in Gdańsk *(www.gpnt.pl)*
The Park includes laboratories, office-technology, Training and Conference Centre, EduPark and EduPrzedszkole. Park offers modern space technology and manufacturing, technology and office and laboratory equipped with ICT infrastructure (Park is expanded - the third stage of the development of park will be completed in the first quarter of 2015). The park also established technology incubator that provides the conditions for the formation and development of new companies based on knowledge and modern technologies, founded by graduates and academics. Investors can use the Park with aid in the form of exemption from income tax on the basis of the authorization of the Pomeranian Special Economic Zone Sp. z o.o..

Pomerania Development Agency *(www.arp.gda.pl)*
Agency. works on the development of Pomerania; helps entrepreneurs, business environment institutions and local authorities; initiates and supports economic projects of regional significance. The basic objectives pursued by the Agency are among others: fostering entrepreneurship (mainly SMEs), to assist local authorities in the implementation of regional policy, supporting investment processes and services for investors (Agency is a coordinator of initiative Invest in Pomerania), support for EU funds, promotion of the region of Pomerania initiating and participating in international cooperation projects.

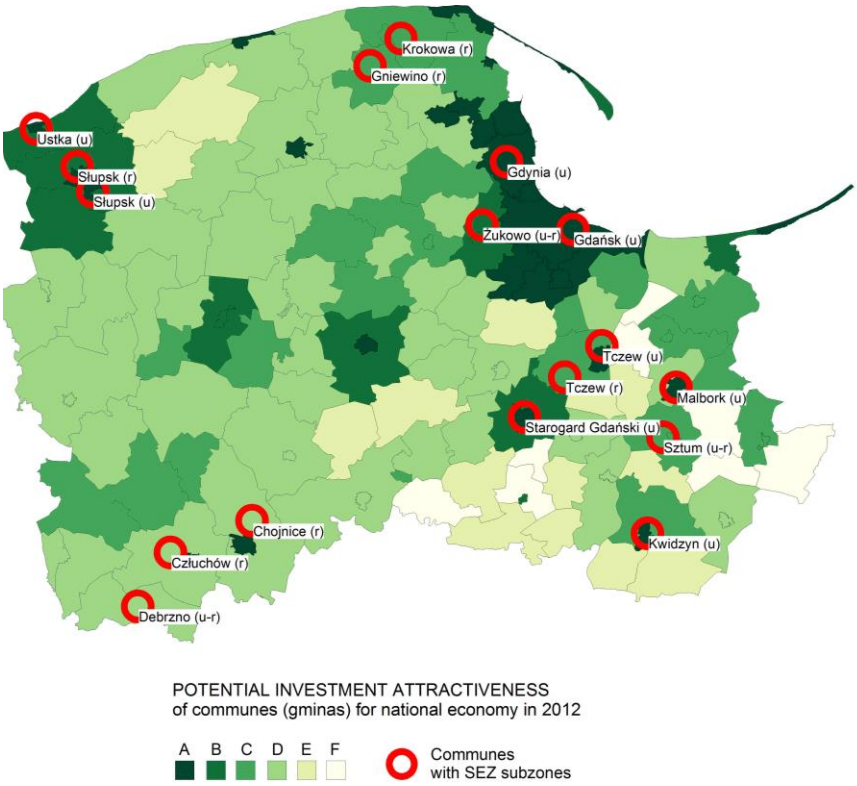
4.2. SPECIAL ECONOMIC ZONES IN THE VOIVODSHIP – EFFECTS

There are two SEZ operating in the voivodship: Pomeranian Special Economic Zone and Słupsk SEZ. At the end of 2013 the areas of the SEZ were parts of 8 cities and 9 communes – see Chart 5.

The first SEZ was created in 1997. Till the end of 2012 the enterprises operating in the Pomeranian and Słupsk SEZ's subzones have invested PLN 4 bln in this area which is 4% of all investment outlays in the Polish SEZs. In the same time the enterprises created 10 thousand new jobs in the region, which was 5% of all new jobs created in the Polish economic zones - see Table 4 in the Appendix.

Highest values of investments were attracted by Kwidzyń: International Paper-Kwidzyn z o.o. (paper industry), Jabil ASEZmbly Poland z o.o. (electrical engineering), Jabil Circuit Poland z o.o. (electrical engineering), Lemahieu Poland z o.o. (production of packaging, boxes and fittings of polystyrene), Tczewa: Cartondruck Poland z o.o. (exclusive production of cardboard packaging), Edoradca z o.o. (Centre for Research and Development OZE), Flextronics International Poland Company o.o (electronics industry), Gemalto Ltd. (electronics industry), MBF Sp. z o.o. (production balloons), PG Mechanics sp. z o.o (electromechanical industry), PRESS GLASS SA (output shaft), SILGAN METAL PACKAGING Tczew SA (production of metal packaging), TAPFLO (manufacturer of industrial pumps), VETREX Sp. z o.o. (production of windows) and Starogard: AKOMEX (production of cardboard packaging and corrugated industry: food, pharmaceutical, cosmetic and chemical industries); Biological Pharmaceutical Technologies sp. z oo (pharmaceutical industry); Pharmaceutical Innovation Centre Sp. z o.o (pharmaceuticals); Molecules Synthesis Centre Sp. Z o.o (pharmaceuticals); GILLMET Sp. z o.o - Galvanizing Fire (galvanizing); PHARMACEUTICAL PLANT "POLPHARMA" SA (pharmaceuticals).

Chart 5. The location of SEZs in Pomeranian voivodship



Source: Authors' own work.

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

- conducting research and development, the services sector and advanced technology, collaborating with academic institutions, and responsible for the collection and processing of data from the machine – for the Pomeranian SEZ

- services and transport and storage and such branches as: automotive, wood processing, electric machinery and metal for the Słupsk SEZ.

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 Pomeranian voivodship: Lębork (u), Gdańska (u) oraz Słupsk (u).

Pomeranian voivodships communes have good websites. All of them have at least 80% of points to win. Gdańsk had maximum amount of points in this category. Assessing the response to messages from potential investors contained most of needed information. All communes maintained 'A' commune title.

APPENDIX

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

Voivodship	PAI1_GN National economy	PAI1_GN National economy	PAI1_C Industry	PAI1_G Trade	PAI1_I Hotels and restaurants	PAI1_M 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 POLISH COUNTIES FOR THE NATIONAL ECONOMY AND ITS 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						
city of Sopot	0.384	A	A	A	A	A
city of Gdańsk	0.363	A	A	A	A	A
city of Słupsk	0.324	A	A	A	B	A
city of Gdynia	0.318	A	A	A	A	A
Puck	0.288	B	B	B	A	B
Gdańsk	0.279	B	B	B	C	C
Nowy Dwór	0.251	C	C	C	B	D
Lębork	0.244	C	D	D	C	C
Wejherowo	0.244	C	D	C	C	C

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

TABLE 4. 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
	National economy	National economy	Industry	Trade	Hotels and restaurants	Professional, scientific and technical activity
Urban communes						
Sopot (u)	0.288	A	A	A	A	A
Tczew (u)	0.277	A	A	A	B	A
Pruszcz Gdański (u)	0.277	A	A	A	A	A
Gdańsk (u)	0.273	A	A	A	A	A
Krynica Morska (u)	0.272	A	A	A	A	A
Malbork (u)	0.270	A	A	A	B	A
Lębork (u)	0.266	A	A	A	B	A
Słupsk (u)	0.265	A	A	A	B	A
Chojnice (u)	0.264	A	A	A	B	A
Puck (u)	0.263	A	A	A	A	A
Starogard Gdański (u)	0.261	A	A	A	B	A
Wejherowo (u)	0.258	A	A	A	A	A
Kwidzyn (u)	0.258	A	A	A	A	A
Ustka (u)	0.257	A	A	A	A	A
Gdynia (u)	0.256	A	A	A	A	A
Rumia (u)	0.253	A	A	A	A	A
Władysławowo (u)	0.243	A	A	A	A	A
Jastarnia (u)	0.231	A	A	A	A	B
Reda (u)	0.230	A	A	A	A	A
Łeba (u)	0.228	A	A	A	A	B
Kościerzyna (u)	0.227	A	A	A	C	A
Człuchów (u)	0.227	A	A	A	B	A

Hel (u)	0.212	B	B	B	A	C
Skórcz (u)	0.205	B	B	B	D	B
Czarna Woda (u)	0.192	C	C	C	C	C
Rural communes						
Kosakowo (r)	0.266	A	A	A	A	A
Pruszcz Gdański (r)	0.244	A	A	A	A	A
Kolbudy (r)	0.231	A	A	A	A	A
Ustka (r)	0.215	B	B	B	A	C
Sztutowo (r)	0.208	B	B	B	A	C
Kobylnica (r)	0.206	B	B	B	A	C
Starogard Gdański (r)	0.204	B	B	D	D	B
Słupsk (r)	0.202	B	B	B	B	C
Kościerzyna (r)	0.202	B	B	B	B	D
Pszczółki (r)	0.200	C	B	C	D	B
Tczew (r)	0.200	C	C	C	C	B
Gniewino (r)	0.200	C	C	B	B	C
Cedry Wielkie (r)	0.199	C	C	C	B	D
Krokowa (r)	0.196	C	C	B	A	C
Stężyca (r)	0.196	C	C	C	B	C
Rzeczenica (r)	0.191	C	C	B	B	C
Stare Pole (r)	0.191	C	C	C	D	C
Tuchomie (r)	0.189	C	C	C	C	D
Studzienice (r)	0.187	C	C	C	B	C
Szemud (r)	0.186	C	C	D	D	C
Konarzyny (r)	0.185	C	D	D	C	D
Kwidzyn (r)	0.184	C	C	D	D	C
Przechlewo (r)	0.184	C	C	C	D	C
Sierakowice (r)	0.184	C	D	D	D	D
Puck (r)	0.183	C	D	D	B	C
Urban-rural communes						
Żukowo (u-r)	0.211	B	B	B	A	B
Bytów (u-r)	0.204	B	C	C	B	B
Kartuzy (u-r)	0.199	C	C	C	C	B
Sztum (u-r)	0.196	C	C	C	C	B
Nowy Dwór Gdański (u-r)	0.195	C	C	C	D	C
Dzierzgoń (u-r)	0.189	C	C	C	D	C
Nowy Staw (u-r)	0.188	C	C	C	E	C

Notice: (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 (LDB), 2014.

TABLE 5. 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	Chojnice(r) Chojnice	58,05	36	products of other non-metallic mineral products
Pomeranian	Człuchów (r) Człuchów	0,00		no leading industry
Słupsk	Człuchów (u-r) Debrzno	0,00		no leading industry
Słupsk	Słupsk (u) Ustka	0,00		no leading industry
Słupsk	Słupsk (r) Słupsk	190,82	369	groceries, warehousing and transportation support services
Słupsk	City of Słupsk (u) Słupsk	286,42	876	fabricated metal products, except machinery and equipment, storage and transportation support services
Słupsk	Kartuzy (u-r) Żukowo	0,00		no leading industry
Pomeranian	Kwidzyn (u) Kwidzyn	1 114,10	1 285	paper and paper products, computers, electronic and optical products
Pomeranian	Malbork (u) Malbork	78,24	109	chemicals and chemical products
Pomeranian	Puck (r) Krokowa	164,75	775	food, metals

Pomeranian	Starogard Gdański (u) Starogard Gdański	605,16	1 706	basic pharmaceutical substances, medicines and other pharmaceutical products
Pomeranian	Tczew (u) Tczew	898,72	3 703	computers, electronic and optical products
Pomeranian	Tczew (r) Tczew	132,77	908	rubber and plastic products, products of other non-metallic mineral products
Pomeranian	Wejherowo (r) Gniewino	0,00		no leading industry
Pomeranian	Sztum (u-r) Sztum	0,44	0	food
Pomeranian	City of Gdańsk (u) Gdańsk	346,40	108	paper and paper products
Pomeranian	City of Gdynia (u) Gdynia	136,39	159	fabricated metal products, except machinery and equipment

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

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