

Warsaw School of Economics



REGIONAL INVESTMENT ATTRACTIVENESS 2014

Western Pomeranian Voivodship

Hanna Godlewska-Majkowska, Ph.D.,
Associate Professor at the Warsaw School of Economics

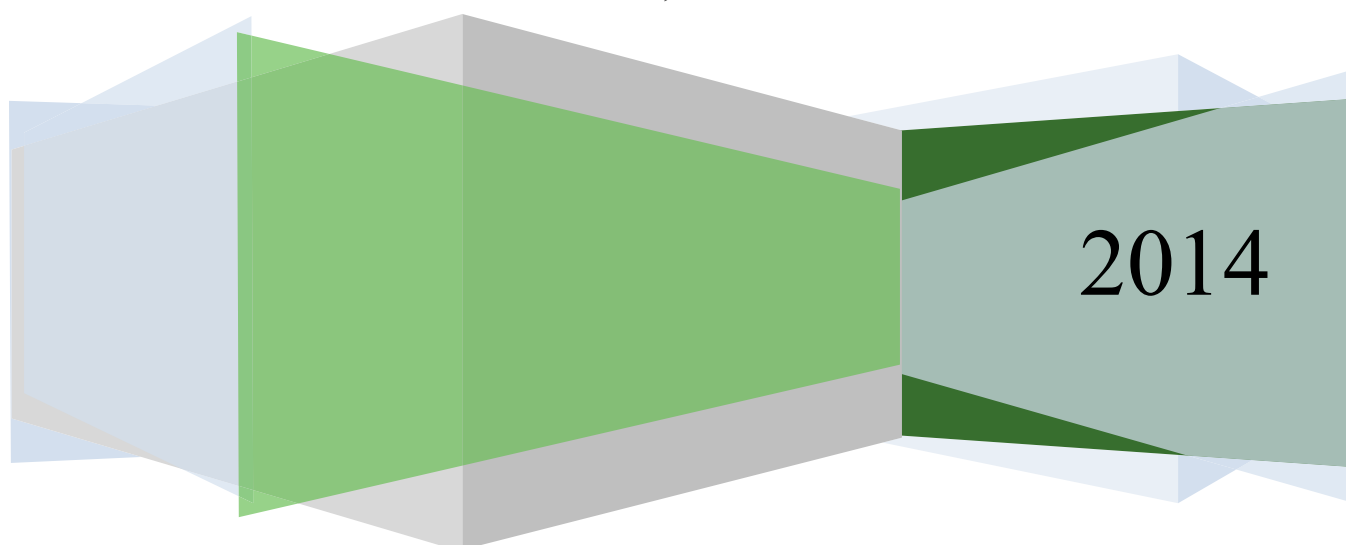
Agnieszka Komor, Ph.D.

Patrycjusz Zarębski, Ph.D.

Mariusz Czernecki, M.A.

Magdalena Typa, M.A.

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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 the Western 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 WESTERN POMERANIAN VOIVODSHIP

Western Pomeranian voivodship is characterised by a very good location in view of European markets and Baltic sea countries. Szczecin, the largest city in the voivodship, attracts the highest values of economic potential in the voivodship and has very good transport connections with European highways and seaways.

The main advantages of the voivodship are:

- exceptional location which gives an opportunity to use a wide range of means of transport (water, rail, air and road transport) in the business activity,
- voivodship's rich traditions connected with maritime economy (the manufacture of vessels, fishery, coastal tourism),
- the fact that more than a half of the area of the voivodship is farmland, which gives a chance of investments in and development of agriculture and food industry,
- favourable natural conditions of the development of tourism (Baltic Sea, Wałęckie and Drawskie Lake Districts),
- huge possibilities of renewable energy production (energy plants, wind farms) , which combined with the development of tourism means that Western Pomeranian voivodship may become a symbol of sustainable development with the use of modern technologies supporting regional economy.

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

Table 1. General characteristics of the economy of Western Pomeranian voivodship

Feature	Western Pomeranian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2012. (PLN/person)	35073.2	41439.1	-
Population (persons) on 31 December 20123	1718861	38495659	4.5%
Human Resources Potential			
Higher education institutions graduates (persons) in 2013	15594	454986	3.4%

Secondary schools graduates (persons) in 2012	10497	271333	3.9%
Number of employed persons on 31 December 2013	572	15568	3.7%
Structure of employed persons in 2013	agriculture 8.0% industry 29.2% services 62.8%	12.0% 30.5% 57.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in in 2013	1882.3	79942.6	2.4%
Capital of companies (PLN m) in 2013	5096.0	206992.3	2.5%
Special economic zones (SEZs) in the voivodship			
<ul style="list-style-type: none">• Kostrzyn-Slubice• Kostrzyn-Slubice/ Słupsk• Mielec/ Kostrzyn-Slubice• Pomeranian• Słupsk			
Distinguishing investment attractiveness ratings PAI 2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2		Labour-intensive industry Class C Trade Class C Tourism Class A	
Real investment attractiveness RAI		National economy Class C Professional, science and technical activities Class C	
Distinguished counties and communes according to PAI1_GN			
Counties	Class A	Police, city of Szczecin, city of Świnoujście, city of Koszalin	
	Class B	Kołobrzeg	
Communes	Class A	Darłowo (u), Szczecin (u), Kołobrzeg (u), Szczecinek (u), Stargard Szczeciński (u), Koszalin (u), Świnoujście (u), Świdwin (u), Sławno (u), Białogard (u), Wałcz (u), Dobra (Szczecińska) (r), Rewal (r), Kołobrzeg (r), Ustronie Morskie (r), Mielno (r), Kołbaskowo (r), Stepnica (r), Police (u-r), Nowe Warpno (u-r), Gryfino (u-r), Międzyzdroje (u-r), Dziwnów * (u-r), Drawsko Pomorskie (u-r)	
	Class B	Biesiekierz (r), Kobylanka (r), Osina (r), Świeszyno (r), Karlino (u-r), Dębno (u-r), Goleniów (u-r), Złocieniec (u-r), Nowogard (u-r), Biały Bór (u-r), Barlinek (u-r), Borne Sulinowo (u-r), Kalisz Pomorski (u-r), Czaplinek (u-r), Choszczno (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 1, 718861 which is 4.5% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 17,7% at productive age and 17.9% 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 18 higher education institutions in which there are 57815 students studying, which makes up 3.7% of all students in Poland. Moreover, 4.3% of the secondary school students in the voivodship attend vocational schools and 4.1% attend technical schools.

The registered unemployment rate in the voivodship amounted to 15,2 % 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 3526.7, which is 93.5% of the average for Poland.

In 2012 Western Pomeranian voivodship made a contribution of 3.8 % to the GDP of Poland. Calculated per capita, it amounted to PLN 35073.2 with the average for Poland PLN 41439.1. With this result the voivodship takes the 8th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 169.9% 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 service sector at the level of 62.8% whereas shares of the agricultural and industrial sectors are respectively 8.0% and 29.2% (Central Statistical Office, Local Data Bank 2014).

In the Western Pomeranian voivodship structure of industry several sectors stand out: food production (22% of the whole industry voivodship production), wood and cork products, except furniture, articles of straw and plaiting materials (12%), fabricated metal products except machinery and equipment (9%) and motor vehicle and trailer production except motorcycles (4%).

Region is a leading producer of wood and cork products except furniture (14% of domestic production value sold in 2013).

In last three years Western Pomeranian voivodship increased or maintained its competitive position in industry measured with share of domestic value production in:

- food production,
- fabricated metal products except machinery and equipment production,
- motor vehicle and trailer production except motorcycles production,
- rubber and plastic products production.

Information about the voivodship's strategic sectors are important for investors. Based on the strategy of regional development strategic sectors include: marine economy, industry, tourism, well-developed commercial and virtual services, computer industry, telecommunications, IT services, biotechnology, genetic technologies, consulting services, knowledge services and development of telemetry.

Investors may find useful a list of high opportunity sectors in Western Pomeranian voivodship prepared by Polish Information and Foreign Investment Agency with Local Government of the West Pomeranian Region cooperation. The list is prepared based on

observations of trends in investment inflows to the region.

The high opportunity sectors are:

- BPO,
- Logistics,
- Renewable Energy Sources (wind energy),
- Tourism.

Investments can be attractively located in Special Economic Zones (SEZs). Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following special economic zones: Kostrzyn-Słubice, Kostrzyn-Słubice/Słupsk, Mielec/Kostrzyn-Słubice, Pomeranian, Słupsk. Each SEZ has its subzone or subzones as follows:

- Kostrzyn-Słubice SEZ, subzones: Barlinek (u-r), Białogard (u), Goleniów (u-r), Gryfino (u-r), Łobez (u-r), Nowogard (u-r), Pelczyce (u-r), Police (u-r),
- Kostrzyn-Słubice/Słupsk SEZ, subzone: Karlino (u-r),
- Mielec/Kostrzyn-Słubice SEZ, subzone: Szczecin (u),
- Pomeranian SEZ, subzone: Stargard Szczeciński (u),
- Słupsk SEZ, subzones: Biesiekierz (r), Kalisz Pomorski (u-r), Koszalin (u), Polanów (u-r), Szczecinek (u), Tychowo (u-r), Wałcz (u).

In all Special Economic Zones mentioned above investors can get income tax relief from 35% up to 55% depending on the size of the company. Further information can be found on: http://www.paiz.gov.pl/investment_support/sez.

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

Western Pomeranian voivodship is a coastal region, which has predispositions in development of tourism and maritime economy. This is why the region was ranked very high in terms of potential investment attractiveness for the hotels and restaurants (class A) section. The region was ranked positively in labour-intensive industry (class C) and trade and repairs (class C) section.

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 professional, scientific and technical activities (class C)

In the years 2003-2012 voivodship slightly raised its competitive position in the foreign direct investment market from 2.13% to 2.29%.

The evaluation of investment attractiveness is based on the methodology developed by the team of the Collegium of Business Administration within the statutory research of Warsaw School of Economics. The evaluation started in 2012 and is based on the measurement of the attractiveness of labour resources, market and innovation.²

Comparing to UE NUTS 2 regions Western Pomeranian voivodship has fairly low investment attractiveness (class E). The voivodship was classified on 250. place among 270 surveyed regions. A competitive advantage in the voivodship is human capital (class A).

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.

Western Pomeranian voivodship is more attractive investment region than

- **in Bulgaria** Severoiztochen, Yugoiztochen, Severen tsentralen, Yuzhen tsentralen, Severozapaden;
- **in Britain:** Lincolnshire;
- **in Czech:** Severozápad;
- **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:** Közép-Dunántúl, Dél-Dunántúl, Észak-Magyarország, Dél-Alföld, Észak-Alföld;
- **in Italy:** Molise, Sardegna, Sicilia, Puglia, Calabria, Basilicata.

² More: *Atrakcyjność inwestycyjna regionów Polski na tle Unii Europejskiej*, joint publication edited by H. Godlewskiej-Majkowskiej, Oficyna Wydawnicza SGH, Warszawa 2014 and <http://kolegia.sgh.waw.pl/pl/KNoP/struktura/IP/struktura/ZOB/>

2. 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.

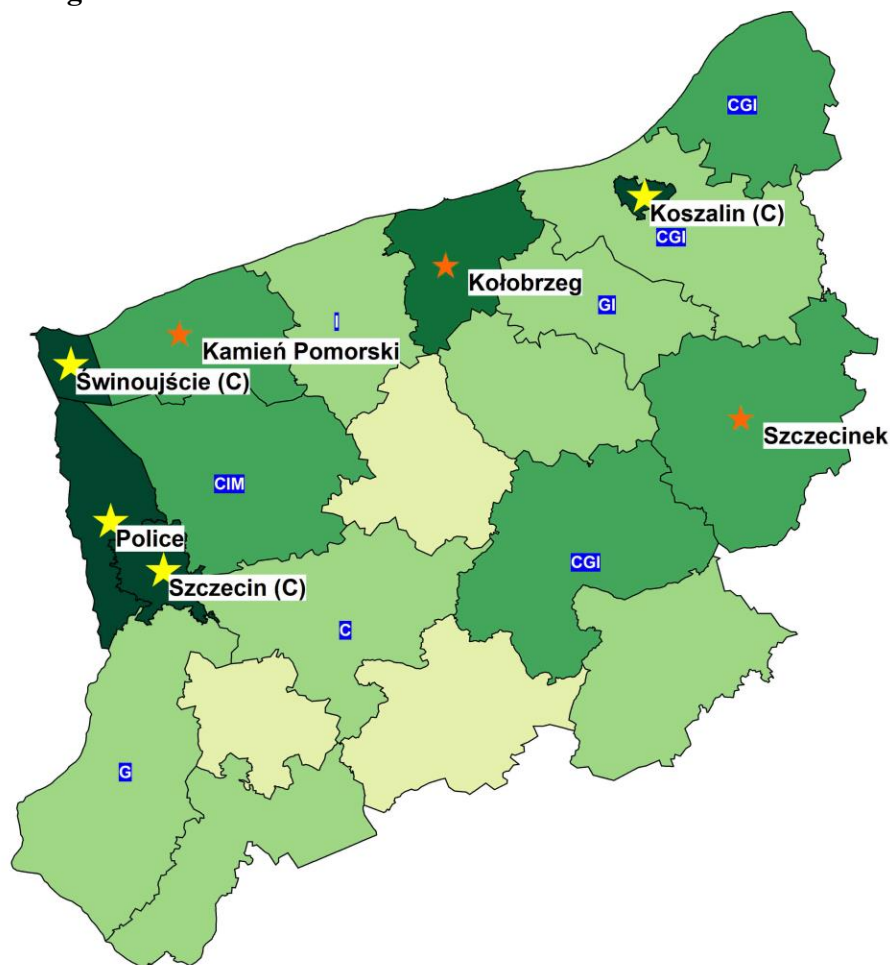
Environment conditions were rated as they are a basic factor influencing tourism development and citizens' life quality.

In order to grade the attractiveness of the tourist services location and their derivatives **natural conditions** evaluation was made, which is an important element of 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.

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



POTENTIAL INVESTMENT ATTRACTIVENESS
of counties (poviats) for national economy in 2012

- | | |
|--|---|
| <ul style="list-style-type: none"> A B C D E F | <ul style="list-style-type: none"> ★ The highest rank for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M ★ Ranks above the average for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M |
|--|---|

Ranks above the average for C, G, I, M sections according to PKD (Polish Classification of Economic Activity)

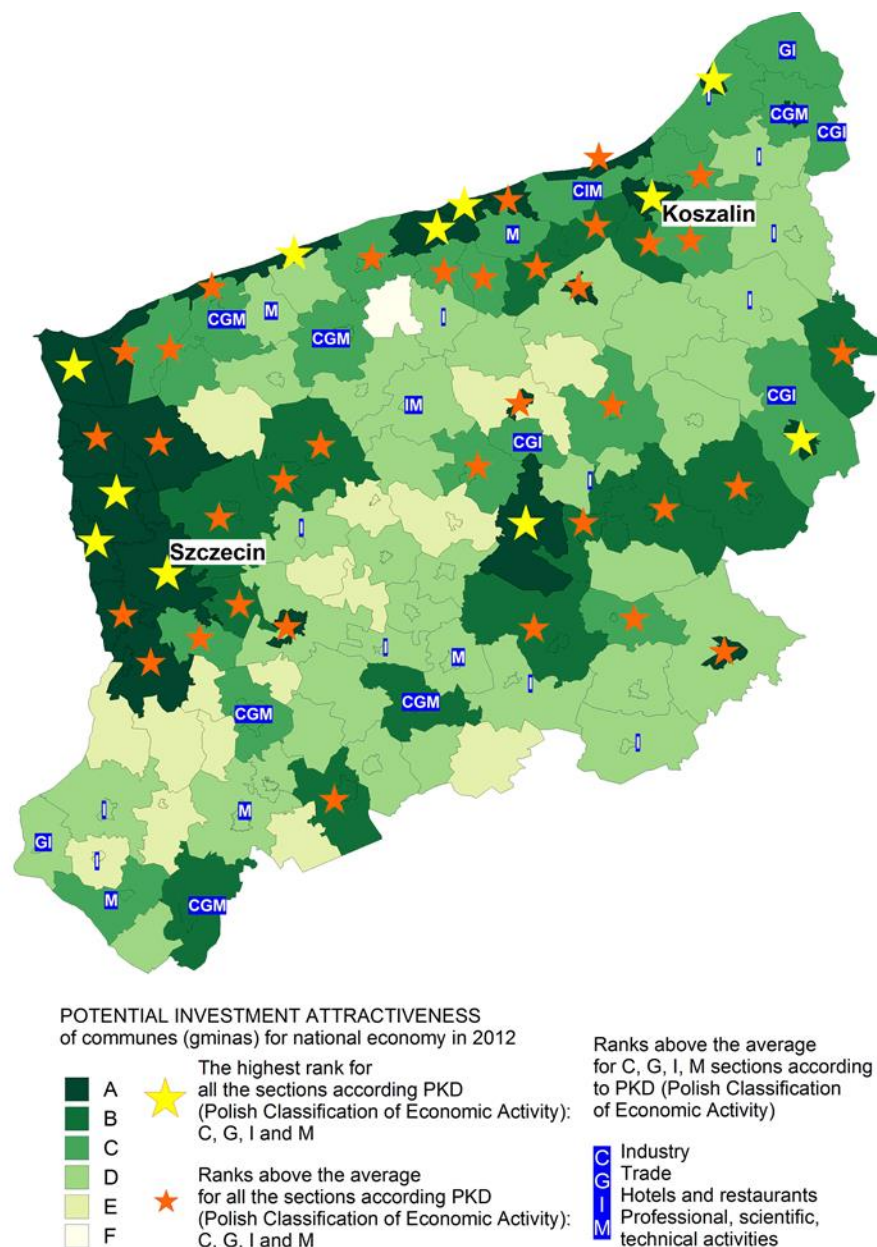
- | |
|---|
| <ul style="list-style-type: none"> C Industry G Trade I Hotels and restaurants M Professional, scientific, technical activities |
|---|

Golden star counties:

Koszalin, Szczecin, Świnoujście, Police

Source: Author's own work.

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



Gold star communes:

Darłowo (u), Dobra (Szczecińska) (r), Drawsko Pomorskie (u-r), Kołobrzeg (u), Kołobrzeg (r), Koszalin (u), Police (u-r), Rewal (r), Szczecin (u), Szczecinek (u), Świnoujście (u)

Source: Author's own work.

When it comes to counties, the highest ranked counties were cities (distinguished with a golden star): Koszalin Szczecin Świnoujście, land counties: Police, Polkowice, and (distinguished with an orange star) Kamień Pomorski, Kołobrzeg and Szczecinek.

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

- **distinguished with a golden star:** Darłowo (u), Kołobrzeg (u), Koszalin (u), Szczecin (u), Szczecinek (u), Świnoujście (u),
- **distinguished with an orange star:** Białogard (u), Stargard Szczeciński (u), Świdwin (u), Wałcz (u).

Among rural communes the highest rank communes include:

- **golden star communes:** Dobra (Szczecin) (r), Kołobrzeg (r), Rewal (r),
- **orange star communes:** Biesiekierz (r), Kobylanka (r), Kołbaskowo (r), Manowo (r), Mielno (r), Osina (r), Siemyśl (r), Stare Czarnowo (r), Stepnica (r), Świeszyno (r) oraz Ustronie Morskie (r).

Among urban-rural communes the highest rank communes include:

- **golden star communes:** Drawsko Pomorskie (u-r), Police (u-r),
- **golden star communes:** Barlinek (u-r), Biały Bór (u-r), Borne Sulinowo (u-r), Czaplinek (u-r), Dziwnów (u-r), Goleniów (u-r), Gościno (u-r), Gryfino (u-r), Kalisz Pomorski (u-r), Karlino (u-r), Łobez (u-r), Międzyzdroje (u-r), Mirosławiec (u-r), Nowe Warpno (u-r), Nowogard (u-r), Połczyn-Zdrój (u-r), Sianów (u-r), Trzebiatów (u-r), Wolin (u-r), Złocieniec (u-r).

3. 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.

3.1. 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 Western Pomeranian voivodship such centre is:

The **Investor Assistance Centre** operating within
Marshal Office of Western Pomeranian Voivodship
www.coi.wzp.pl



Western Pomeranian Investor Services 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:

Northern Chamber of Commerce in Szczecin (www.izba.info)

The Chamber is an independent organization established to protect and represent the interests of its affiliated entrepreneurs. The purpose of the Chamber is to create conditions of development and modernization of the economy, supporting initiatives of members and to promote the development

of interregional and international economic relations. The offer of the Chamber includes: representation of the interests of members and providing training, consulting, tourism and business trips, regular social events and activities, promotional services, assistance in finding business partners, assist in the resolution of disputes (The Western Pomeranian Arbitration Court) . The Chamber is also implementing a number of EU projects stimulating the economic development of the region.

Scandinavian-Polish Chamber of Commerce Regional representative in Szczecin (www.spcc.pl)

Scandinavian - Polish Chamber of Commerce is an association created by business people and entrepreneurs associated with Scandinavia. SPCC headquarters is located in Warsaw, but the organization is active throughout the country through representatives in Krakow, Poznan, Tri-City, Szczecin and Wroclaw. Chambers offer includes: network of contacts, exchange of experience and knowledge, supporting Scandinavian-Polish interests. The Chamber helps companies associated to the SPCC, among others, by: providing opportunities for networking and business meetings and conferences, promotion of member companies at events organized by the Chamber and on the website, information services, promoting Scandinavian culture.

Koszalin Chamber of Commerce and Industry (www.kiph.com.pl)

Koszalin Chamber of Commerce and Industry is an organization bringing together entrepreneurs from Central Pomerania. The main task of the Chamber is to represent the interests of the business entities to state authorities, local government and other institutions and organizations. The offer of the Chamber includes: information services, training, consultancy, assistance in finding foreign trade partner, translation services, organization of trade missions, trade fairs group trips abroad, courses, seminars, legalization of documents, issuing certificates of origin.

Technopark Pomerania (Szczeciński Park Naukowo - Technologiczny Sp. z o.o.) (www.spnt.pl)

The objective of Technopark Pomerania has been to support the development of innovation in Szczecin. Technopark offer includes : rental offices, conference rooms and training, consulting and training services, virtual office service, the server (secure storage and processing of data).As part of the expansion program Technopark offers advisory and information services, PR for growing companies that are already exist on the IT market. The program dedicated for start-ups, which will have its headquarters in Technopark Pomerania.

Industrial Park of Goleniów (www.goleniow.pl)

Industrial Park of Goleniów is an area of approximately 405 ha, designed for production and industrial services. The park has road network designed for heavy transport. The Park is a part of Special Economic Zone which is a subzone Kostrzyń - Słubice SEZ. Park is managed by the mayor

of the commune, and the work associated with its development, investment and operation is carried out by employees of community.

Industrial Park in Stargard (www.sarl.pl)

Industrial Park in Stargard is an area of investment with over 150 hectares. Park is managed by Stargard Local Development Agency. Agency provides investors with comprehensive support at every stage of the investment. The Park includes built-up areas of industrial facilities remaining after liquidated or restructured enterprises and land prepared for new investments.

High Technologies Industrial Park in Stargard Szczeciński
(<http://stargard.home.pl/stargard.eu/eng/>)

HTIP is located on the territory of the former Soviet military airport (Kluczewo) in Stargard Szczeciński. The area of the Park is approximately 850 hectares, of which at present there are approximately 250 hectares earmarked for investment in the first stage. Such a large area gives many opportunities for large projects. Part of the area has Special Economic Zone status - Pomeranian Special Economic Zone. Park is equipped with the necessary infrastructure of media. Park is designed for industrial production and manufacturing component business.

Invest-Park in Białogard (<http://www.investpoland.info>)

Park offer includes a fully developed investment areas (part of the area is covered by Kostrzyn Special Economic Zone) for the purpose of manufacturing and industrial services; rental or sale of new production standard and built according to the individual needs of investors (new production facility can be rented with the possibility of a later purchase). In the "Invest-Park" also functions Technology Incubator. Incubator offers rental of industrial space for production and service, together with technological lines for powder coating and paint spray chamber. Investing activities in the areas of "Invest-Park" investor receives free support from the Regional Office of Investor on m.in: contacts with the public administration, training and recruitment (Bank Personnel).

Technology Park in Koszalin (www.pt.koszalin.pl)

The aim of the PT SA is to support the development of innovative technologies businesses (mainly IT and telecommunications), increase the competitiveness of companies, create jobs, increase the attractiveness and economic competitiveness of the city of Koszalin, and stimulating the scientific community and local business. Offer for companies include:: rental of office space (business incubator), business consulting, accounting and legal services, organization of trade missions, study visits, exchanges and cooperative training workshops, assistance in finding partners, domestic and foreign, assistance in the preparation of European projects, conference room, promotional services for companies operating in the Park, an e-platform (e-learning platform for training), business networking - the exchange of information, resources and networking.

Regional Centre for Innovation and Technology Transfer in Szczecin
(www.innowacje.zut.edu.pl)

The Centre is a part of Western Pomeranian University of Technology in Szczecin. Centre operates counselling and training for companies, researchers and graduate students in the field of technology transfer, research and development funding and support for academic entrepreneurship. In addition, contacts and coordinates the cooperation between the business sector and the development of science and animates industrial clusters. RCIiTT offer for businesses include.: seeking domestic and foreign business partners, mediation in sales and purchase of technology, animation cluster initiatives of regional activities, identification of the potential of innovative companies. Offer applies to entrepreneurs, among others evaluation of an idea for a new business, arranging meetings with potential investors, assistance in preparing a business plan and promotional services.

Western Pomeranian Centre for Advanced Technologies in Szczecin
(<http://www.zcztp.sps.pl/spip.php?rubrique8>)

Consortium under the name "West Centre of Advanced Technologies" was created by universities (University of Szczecin, Pomeranian Medical University, Szczecin Agricultural University) and businesses. The aim is to integrate and intensify interdisciplinary research teams with the participation of the members in the field of technology and polymer materials, including genomics. The Consortium is focused on carrying out the work or projects, bilateral and multilateral, national and international, with operators, associations of an economic, as well as partners in the socio-self. The result of the activities to be stimulating economic growth and the creation of new businesses and jobs.

3.2. SPECIAL ECONOMIC ZONES IN THE WESTERN POMERANIAN VOIVODSHIP – EFFECTS

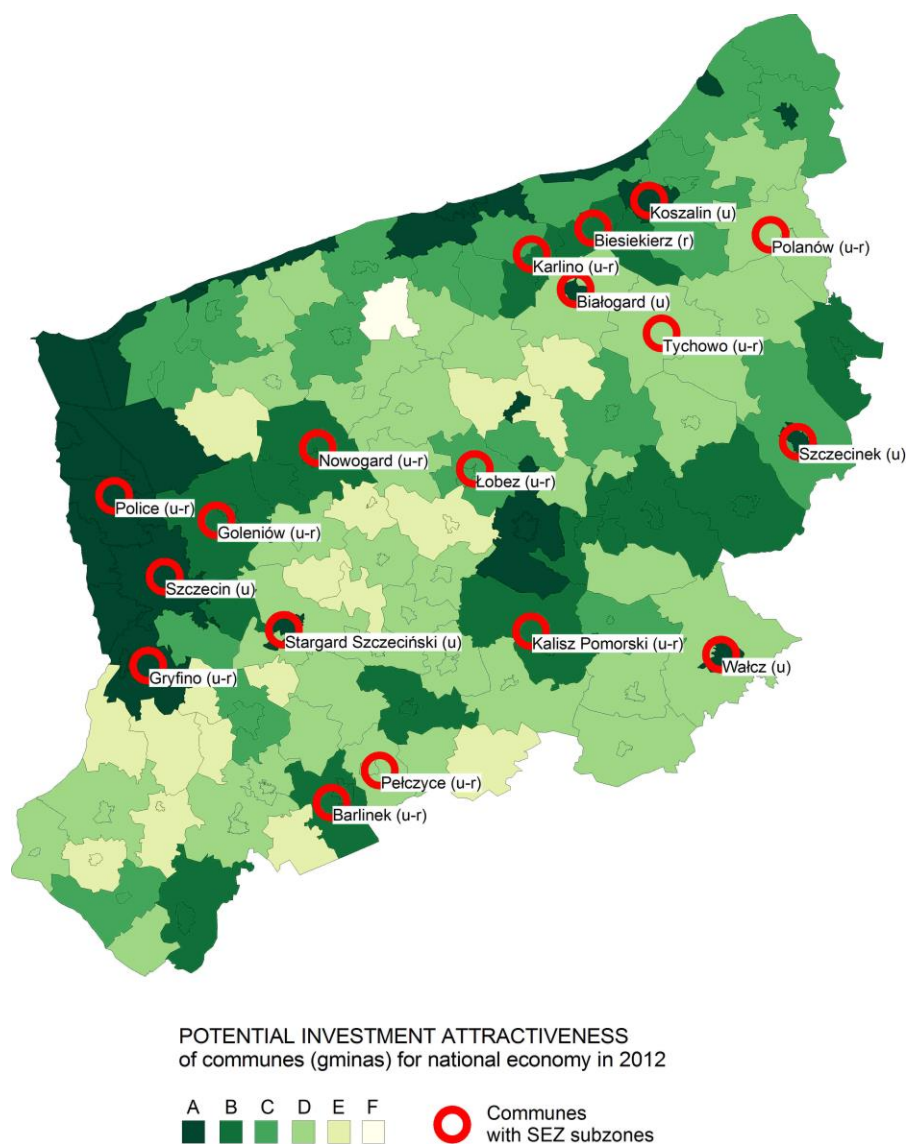
There are four Special Economic Zones in the Western Pomeranian voivodship: Pomeranian, Słupsk, Kostrzyn-Słubice i Mielec. At the end of 2013 the areas of the SEZ were parts of 6 cities and 12 communes – see Chart 5.

The first SEZ was created in 2002. Till the end of 2013 the enterprises operating SEZs have invested PLN 3.4 bln in this area which is 4% of all investment outlays in the Polish SEZs. In the same time the enterprises created 5.3 thousand new jobs in the region, which was 3% of all new jobs created in the Polish economic zones - see Table 3 in the Appendix.

Stargard Szczeciński attracted investments of the highest value in the following industries: industry of rubber and plastic Bridgestone Stargard Sp. z o.o. (tire production), pharmaceutical industry: Biological Pharmaceutical Technologies Sp. z o.o. (pharmaceuticals), Pharmaceutical Innovation

Centre Sp. z o.o. (pharmaceuticals), Molecules Synthesis Centre Sp. z o.o. (pharmaceuticals), GILLMET Sp. z o.o. (galvanizing).

Chart 5. The location of SEZs in Western Pomeranian voivodship



Source: Author's own work.

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

- that are able to develop the existing shipyard areas along with human potential existing in the Szczecin agglomeration of the metal and electrical industry - for Kostrzyn SEZ

- the metal industry, engineering and electrical engineering, investment areas that may develop human resources capacity and a large agglomeration of Szczecin - for Mielec SEZ,
- the metal industry, machinery and electronics - in the case of the Pomeranian SEZ
- representing branches metal, machine, electricians and warehouse logistics services - for Slupsk SEZ.

3.3. '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 1 is situated in Western Pomeranian voivodship: city of Kołobrzeg. As one of two received maximum amount of points for website.

Kołobrzeg officials also gave a fairly comprehensive answers to both potential investors in Polish and English. Because of that Kołobrzeg took 12th place in the ranking.

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
LESEZR 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 S OF WESTERN 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						
Police	0.362	A	A	A	A	A
City of Szczecin	0.332	A	A	A	A	A
City of Świnoujście	0.332	A	A	A	A	A
City of Koszalin	0.313	A	A	A	A	A
Kołobrzeg	0.285	B	B	A	A	B
Goleniów	0.260	C	C	D	C	C
Szczecinek	0.254	C	C	C	C	C
Drawsko Pomorskie	0.250	C	C	C	C	D
Sławno	0.249	C	C	C	A	D
Kamień Pomorski	0.249	C	C	C	A	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 COMMUNES OF WESTERN 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						
Darłowo (u)	0.265	A	A	A	A	A
Szczecin (u)	0.264	A	A	A	A	A
Kołobrzeg (u)	0.264	A	A	A	A	A
Szczecinek (u)	0.255	A	A	A	A	A
Stargard Szczeciński (u)	0.251	A	A	A	B	A
Koszalin (u)	0.248	A	A	A	A	A
Świnoujście (u)	0.247	A	A	A	A	A
Świdwin (u)	0.245	A	A	A	B	A
Sławno (u)	0.235	A	A	A	D	A
Białogard (u)	0.234	A	A	A	C	A
Wałcz (u)	0.233	A	A	A	C	A
Rural communes						
Dobra (Szczecin) (r)	0.266	A	A	A	A	A
Rewal (r)	0.261	A	A	A	A	A
Kołobrzeg (r)	0.253	A	A	A	A	A
Ustronie Morskie (r)	0.234	A	A	A	A	B
Mielno (r)	0.230	A	A	A	A	B
Kołbaskowo (r)	0.226	A	A	B	A	A
Stepnica (r)	0.222	A	A	B	B	B
Biesiekierz (r)	0.217	B	B	B	A	B
Kobylanka (r)	0.215	B	B	C	A	B
Osina (r)	0.210	B	B	C	A	B
Świeszyno (r)	0.206	B	B	C	B	B
Manowo (r)	0.196	C	C	C	B	C
Brzeźno (r)	0.191	C	C	C	C	D
Szczecinek (r)	0.191	C	C	C	C	D

Stare Czarnowo (r)	0.190	C	C	C	C	C
Siemysł (r)	0.189	C	C	C	C	C
Dygowo (r)	0.187	C	D	D	D	C
Będzino (r)	0.184	C	C	D	B	C
Postomino (r)	0.182	C	D	C	A	D
Darłowo (r)	0.182	C	D	D	A	D
Sławno (r)	0.182	C	C	C	B	D
Urban-rural communes						
Police (u-r)	0.274	A	A	A	A	A
Nowe Warpno (u-r)	0.233	A	A	A	A	C
Gryfino (u-r)	0.229	A	A	B	C	A
Międzyzdroje (u-r)	0.229	A	A	A	A	B
Dziwnów (u-r)	0.225	A	A	A	A	B
Drawsko Pomorskie (u-r)	0.224	A	A	A	A	A
Karlino (u-r)	0.218	B	B	A	A	B
Dębno (u-r)	0.217	B	B	C	D	A
Goleniów (u-r)	0.215	B	B	B	C	A
Złocieniec (u-r)	0.212	B	B	B	C	B
Nowogard (u-r)	0.209	B	C	C	B	B
Biały Bór (u-r)	0.209	B	B	C	A	B
Barlinek (u-r)	0.208	B	B	B	C	B
Borne Sulinowo (u-r)	0.202	B	B	B	B	C
Kalisz Pomorski (u-r)	0.202	B	C	B	B	C
Czaplinek (u-r)	0.202	B	C	C	B	C
Choszczno (u-r)	0.201	B	C	C	D	B
Sianów (u-r)	0.200	C	B	B	B	C
Trzebiatów (u-r)	0.199	C	C	C	B	B
Gryfice (u-r)	0.199	C	C	C	D	B
Gościno (u-r)	0.198	C	C	B	C	C
Pyrzyce (u-r)	0.197	C	C	C	E	B
Kamień Pomorski (u-r)	0.195	C	C	C	D	C
Mirosławiec (u-r)	0.193	C	C	C	C	C
Połczyn-Zdrój (u-r)	0.186	C	C	C	C	C
Wolin (u-r)	0.185	C	C	C	A	C
Łobez (u-r)	0.184	C	C	C	C	C
Mieszkowice (u-r)	0.182	C	D	D	D	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 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)
Kostrzyn-Słubice	Choszczno (u-r) Pełczyce	0.00		no leading industry
Kostrzyn-Słubice	Goleniów (u-r) Goleniów	174.40	896	chemicals and chemical products
Kostrzyn-Słubice	Goleniów (u-r) Nowogard	0.00		no leading industry
Kostrzyn-Słubice	Gryfino (u-r) Gryfino	0.00		no leading industry
Kostrzyn-Słubice	Myślibórz (u-r) Barlinek	426.67	1 242	wood and products of wood and cork, except furniture; articles of straw and materials of a kind used for plaiting
Kostrzyn-Słubice	Police (u-r) Police	0.00		no leading industry
Pomeranian	Stargard Szczeciński (u) Stargard Szczeciński	1 518.21	1 114	rubber and plastic products
Kostrzyn-Słubice	Łobez (u-r) Łobez	0.00		no leading industry
Mielec/ Kostrzyn-Słubice	City of Szczecin (u) Szczecin	54.37	223	textiles, fabricated metal products, except machinery and equipment, electrical and non-electrical household appliances

Kostrzyn-Słubice	Białogard (u) Białogard	0.00		no leading industry
Kostrzyn-Słubice/ Słupsk	Białogard (u-r) Karlino	418.27	216	wood and products of wood and cork, except furniture; articles of straw and materials of a kind used for plaiting
Słupsk	Białogard (r) Tychowo	0.00		no leading industry
Słupsk	Drawsko Pomorskie (u-r) Kalisz Pomorski	0.00		no leading industry
Słupsk	Koszalin (r) Biesiekierz	0.00		no leading industry
Słupsk	Koszalin (u-r) Polanów	0.00		no leading industry
Słupsk	Szczecinek (u) Szczecinek	388.07	111	wood and products of wood and cork, except furniture; articles of straw and materials of a kind used for plaiting
Słupsk	Wałcz (u) Wałcz	144.27	237	chemicals and chemical products, metals, fabricated metal products, except machinery and equipment
Słupsk	City of Koszalin (u) Koszalin	222.37	1 274	products of other non-metallic mineral products, storage and transportation support services

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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