

Warsaw School of Economics



REGIONAL INVESTMENT ATTRACTIVENESS 2015

Kuyavian-Pomeranian Voivodship

prof. Hanna Godlewska-Majkowska, Ph.D., Full Professor

Agnieszka Komor, Ph.D.

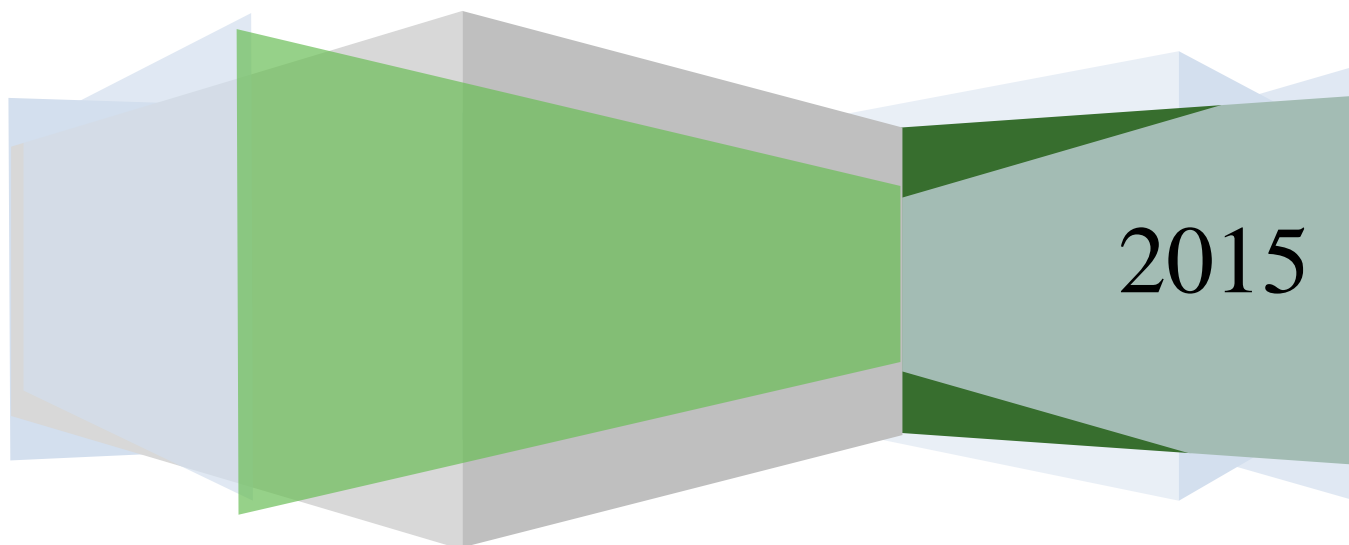
Dariusz Turek, Ph. D.

Patrycjusz Zarębski, Ph.D.

Mariusz Czernecki, M.A.

Magdalena Typa, M.A.

Report prepared for the Polish Information
and Foreign Investment Agency
at the Institute of Enterprise, Warsaw School of Economics
Warsaw, December 2015





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 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.

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

- investment site selection;
- tailor-made investors visits to Poland;
- information on legal and economic environment;
- data on available investment incentives;
- facilitating contacts with central and local authorities;
- identification of potential suppliers and contractors;
- care of the investors operating in the country, including the reinvestment.

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 prof. H. Godlewska-Majkowska, Ph.D., full professor in 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: *powiat*) 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 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 – accommodation 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 voivodships, 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 2013 (PLN/person) | 35609 | 43175 | - |
| Population (persons) on 31 December 2014 | 2.089.992 | 38.478.602 | 5,4% |
| Human Resources Potential | | | |
| Higher education institutions graduates (persons) in 2014 | 19915 | 424317 | 4,7% |
| Secondary schools graduates (persons) in 2014 | 14256 | 271333 | 5,3% |
| Number of employed persons in 2014 (in thousands) | 781 | 15859 | 4,9% |
| Structure of employed persons in 2013 | agriculture sector 14,1% industry sector 31,2% services sector 54,7% | | 11,5% 30,5% 58,0% |
| Investment outlays and capital of companies with foreign capital participation in the voivodship | | | |
| Investment outlays (PLN m) in 2013 | 1372,3 | 75105,1 | 1,8% |
| Capital of companies (PLN n) in 2013 | 3100,9 | 209130,1 | 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 (PAI_GN) | | | |
| Counties | Class A | city of Bydgoszcz, city of Grudziądz , city of Toruń, city of Włocławek, | |
| | Class B | | |
| Communes | Class A | Barcin (u-r), Brodnica (u), Bydgoszcz (u), Chełmno (u), Chełmża (u), Ciechocinek (u), Golub-Dobrzyń (u), Grudziądz (u), Inowrocław (u), Osielesko | |

| | | |
|--|---------|---|
| | | (r), Solec Kujawski (u-r), Świecie (u-r), Toruń (u), Wąbrzeźno (u), Włocławek (u) |
| | Class B | Aleksandrów Kujawski (u), Białe Błota (r), Janikowo (u-r), Kowal (u), Łysomice (r), Nakło nad Notecią (u-r), Radziejów (u), Rypin (u), Wielka Nieszawka (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 2089992 (as of 2014), which is 5.4% of the population of Poland. The age structure in the voivodship in 2014 was as follows: 18.3% of the population at pre-productive age, 63.3% at productive age and 18.4% at post-productive age (for Poland it was 18%, 63% and 19% respectively).

The main potential for human capital creation in the voivodship lies in 22 higher education institutions in which there are 65.000 students studying, which makes up 4.4 % of all students in Poland. According to a report prepared by the Committee for Evaluation of Research (KEJNA) for the Ministry of Science and Higher Education in Kuyavian-Pomeranian university faculty received the highest scientific category A +, is this: the Faculty of Humanities at the Nicolaus Copernicus University in Torun; 10 faculties received the category - A; 24 faculties received a category - B; and 2 faculties category - C. It is also worth mentioning that 15 colleges had not received any category awarded by KEJNA (- see table 5 in appendix).

In the voivodship 13.4% of the secondary school students in the voivodship attend vocational schools and 30.2% attend technical schools.

The registered unemployment rate in the voivodship amounted to 13% in August 2015, compared to 9.7% in Poland². The average monthly gross wages and salaries in enterprises sector in the first half-year of 2015 amounted to PLN 3303.0, which is 88% of the average for Poland.

In 2013 Kuyavian-Pomeranian voivodship made a contribution of 4.5% to the GDP of Poland. Calculated per capita, it amounted to PLN 35609 with the average for Poland PLN 43175. With this result the voivodship takes the 10th place in the country. The GDP growth rate in the voivodship in the years 2003-2013 amounted to 182% while the average for Poland amounted to 197%.

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 54.7% whereas a share of the

² The unemployed and the unemployment rate according to regions, sub-regions and counties (as of the end of August 2015). Central Statistical Office.

agricultural and industrial sectors are respectively 14.1% and 31.2% (Central Statistical Office, Local Data Bank 2015).

In the structure of voivodship's industry important role is played by: manufacture of food products (27% 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, manufacture of rubber and plastic products and manufacture of metal products (10% each).³

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 2014).

The voivodship's position is especially strong among the voivodships specialized in manufacture of chemicals and chemical products (9% of the country's sold production in 2014), food products (7%), rubber and plastic products (7%), printing industry, manufacture of metal products and furniture (about 6% each).

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 BPO/SSC, 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), Brodnica (u), Inowrocław (u).

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.

³ Calculations based on Statistical Bulletin of Lower Silesia from the first quarter of 2015 and the Bulletin of Statistics, the first quarter of 2015 www.stat.gov.pl (11/10/2015).

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 2013 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 1.0% to 1.6% 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 three years. They are based on measurements of attractiveness of human resources, market and innovativeness.⁴ 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 218th place of 270 regions, for whom the indices were calculated. Kuyavian-Pomeranian voivodship has a competitive advantage, when it comes to human capital microclimate, ranked class A, at the 36nd place among all the EU regions (NUTS_2)

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

- **in Great Britain:** Cornwall and Isles of Scilly, Lincolnshire, West Wales and The Valleys,
- **in Bulgaria** Severen tsentralen, Severoiztochen, Severozapaden, Yugoiztochen, Yuzhen tsentralen;
- **in Czech Republic:** Severozápad;
- **in Greece:** Anatoliki Makedonia, Thraki, Dytiki Ellada, Dytiki Makedonia, Ionia Nisia, Ipeiros, Peloponnisos, Sterea Ellada, Thessalia, Voreio Aigaio;
- **in Spain:** Canarias, Castilla-La Mancha, Extremadura;

⁴ 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 Germany:** Lüneburg;
- **in Portugal:** Alentejo, Centro, Região Autónoma da Madeira, Região Autónoma dos Açores;
- **in Romania:** Centru, Nord-Est, Nord-Vest, Sud - Muntenia, Sud-Est, Sud-Vest Oltenia, Vest;
- **in Slovakia:** Východné Slovensko;
- **in Hungary:** Dél-Alföld, Dél-Dunántúl, Észak-Alföld, Észak-Magyarország;
- **in Italy:** Basilicata, Calabria, Molise, Puglia, Sardegna, Sicilia.

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 1 and Chart 2). The distinguished locations presented on the map are marked with stars that indicate highest marks for the above-mentioned areas of conducting business.

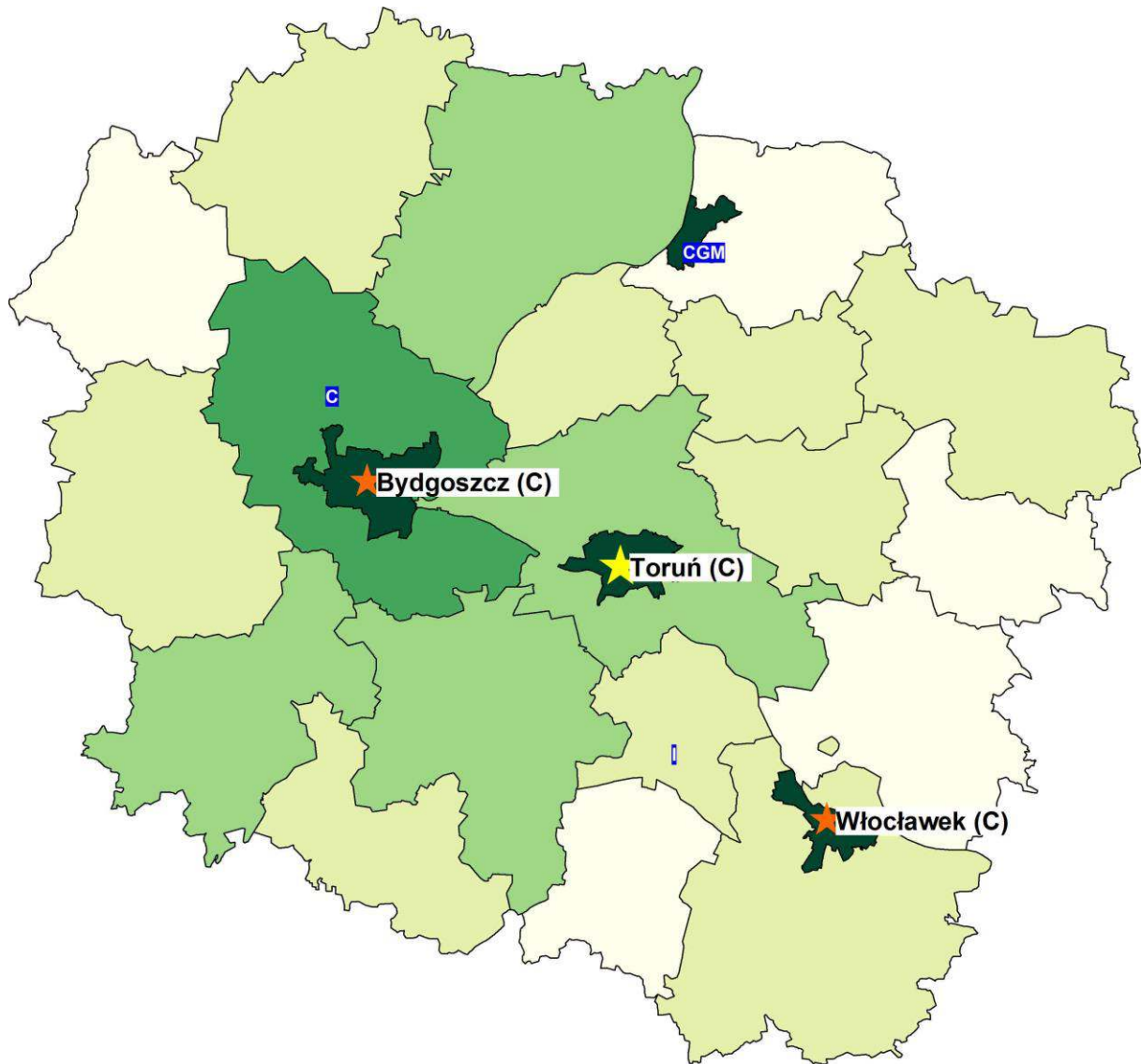
An **orange star** means that a county or a commune was rated above average in all the sections analysed (national economy, industry, trade, tourism and professional services) and the **golden star** is the highest distinction and means that all the rated sections in a particular commune or county were 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 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 1. Potential investment attractiveness of counties of Kuyavian-Pomeranian voivodship, considering the most attractive sections



POTENTIAL INVESTMENT ATTRACTIVENESS
of counties (poviats) for national economy in 2014

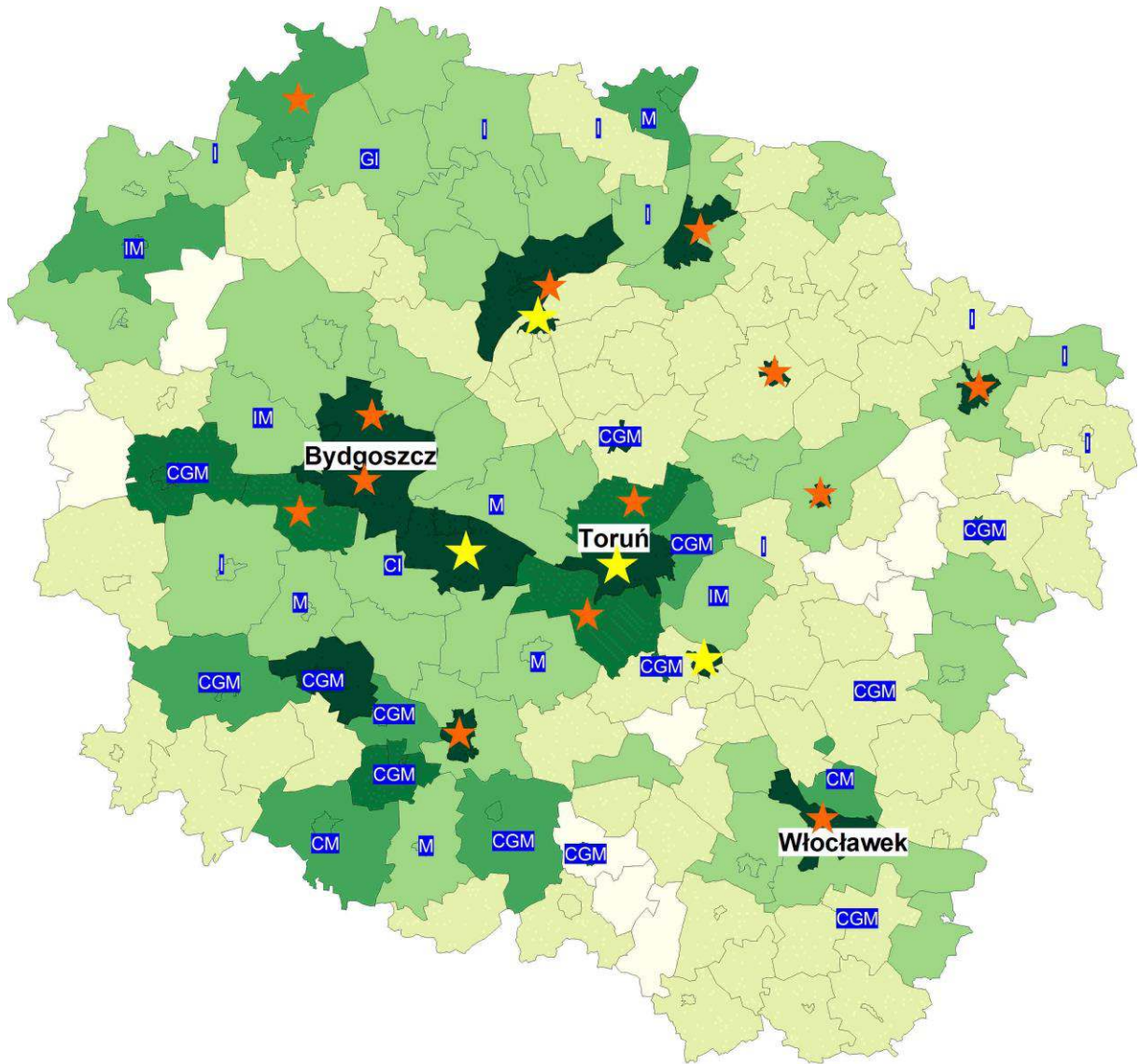
- | | | |
|--|---|--|
| <ul style="list-style-type: none"> A B C D E F | <ul style="list-style-type: none"> The highest rank for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M Ranks above the average for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M | <ul style="list-style-type: none"> Ranks above the average for C, G, I, M sections according to PKD (Polish Classification of Economic Activity) C Industry G Trade and repairs I Accommodation and catering M Professional, scientific, technical activities |
|--|---|--|

Golden star county:

Toruń

Source: Authors' own work.

Chart 2. Potential investment attractiveness of communes of Kuyavian-Pomeranian voivodship, considering the most attractive sections



POTENTIAL INVESTMENT ATTRACTIVENESS
of communes (gminas) for national economy in 2014

- | | | |
|--|---|--|
| <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 | <ul style="list-style-type: none"> Ranks above the average for C, G, I, M sections according to PKD (Polish Classification of Economic Activity) C Industry G Trade and repairs I Accommodation and catering M Professional, scientific, technical activities |
|--|---|--|

Golden star communes:

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

Source: Authors' own work

Among rural communes the highest rank communes include:

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

Among urban-rural communes the highest rank communes include:

- **golden star communes:** Solec Kujawski (u-r),
- **orange star communes:** 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 in Bydgoszcz (*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 - as an associate of SOLVIT Poland - mediate in solving problems of Polish entrepreneurs operating in other EU countries who encounter difficulties there in the freedom to conduct business resulting from contact with the authorities or public institutions.

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. The offer also includes, among others, the organization of trade missions and study tours, advisory services for exporters, the association of foreign partners, the opportunity to participate in a group discount, trainings, workshops, conferences, legalization of certificates of origin of goods export companies, economic information (eg. business reports).

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

BCC is an organization of entrepreneurs and individual employers. BCC members accept the Statute of committing their organizations to represent high standards of ethical principles of the Code of trade and act in accordance with the idea of corporate social responsibility. BCC

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. BPPT offers assistance to investors at every stage of investment planning, preparing, separation and division of geodetic plots of land hydrogeological studies, construction of new and expansion of existing infrastructure.

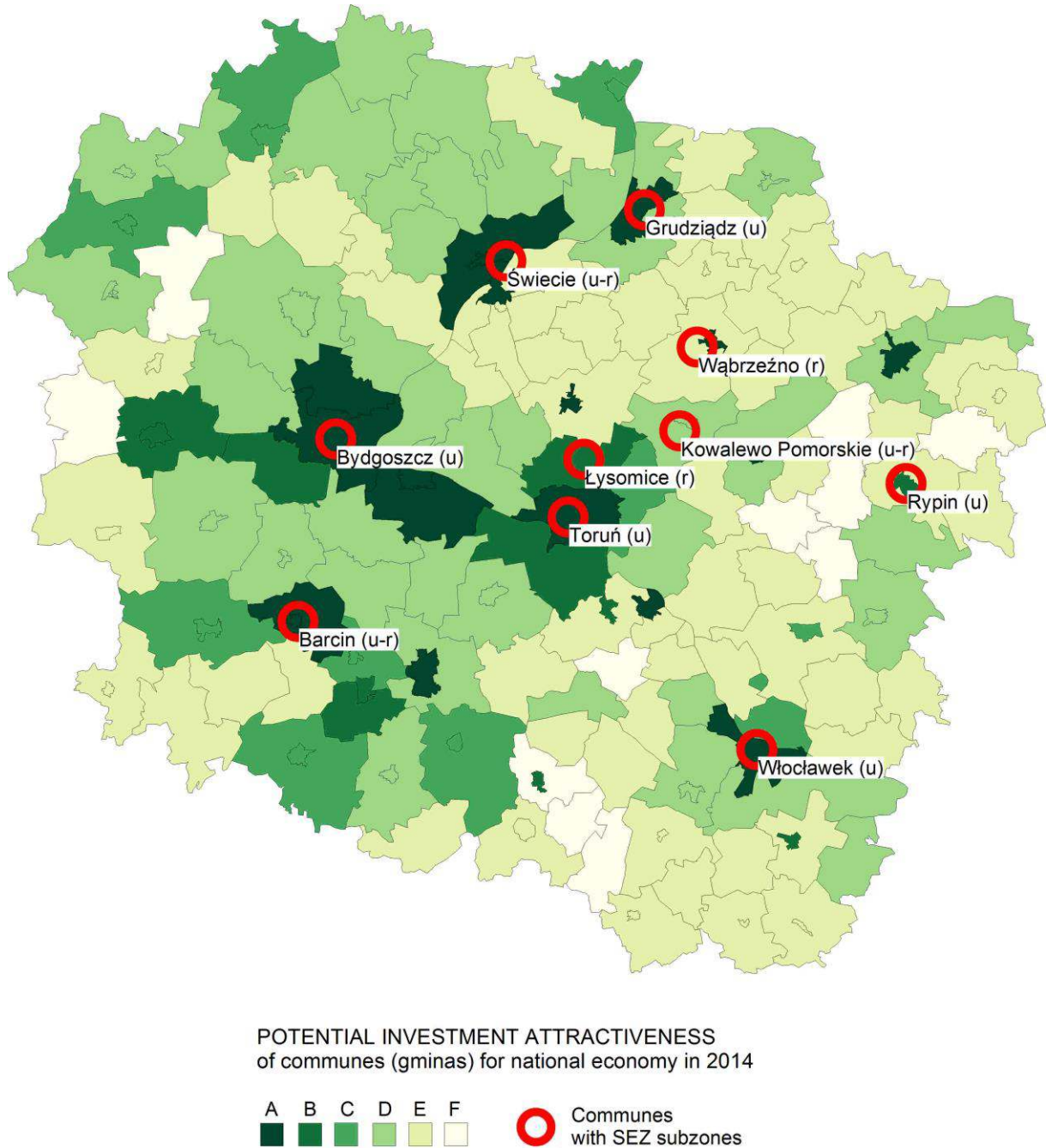
Toruń Technology Park (*Toruński Park Technologiczny*) (www.technopark.org.pl)

The offer of the park includes 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, consulting services, virtual office and technological audit. It also organizes international business meetings of companies (cooperation exchange forums and trade missions) that activate companies' trade and technology cooperation. Park helps in searching of business partners abroad, and facilitates the transfer of technology (comprehensive services for the verification of records of contracts concluded for the valuation of technology, protection of industrial property, as well as translations of the contract).

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 2014 the areas of the SEZ were parts of 7 cities and 5 communes – see Chart 3.

The Pomeranian SEZ was created in 2006. Till the end of 2014 the enterprises operating in the Pomeranian SEZ's subzones have invested PLN 3.4 bln in this area which is 3% of all investment outlays in the Polish SEZs. In the same time the enterprises created 5.1 thousand new jobs in the region, which was 2% of all new jobs created in the Polish economic zones - see Table 4 in the Appendix.

Chart 3. 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.

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 and repairs | Accommodation and catering | Professional, scientific and technical activities |
| Voivodships | | | | | | |
| LOWER SILESIAN | 0,818 | A | A | A | B | B |
| KUYAVIAN-POMERANIAN | 0,565 | C | C | E | D | D |
| LUBLIN | 0,173 | F | E | F | F | F |
| LUBUSZ | 0,319 | E | E | D | C | E |
| ŁÓDŹ | 0,566 | C | B | E | E | D |
| LESSER POLAND | 0,691 | B | B | A | A | B |
| MAZOVIAN | 0,985 | A | A | A | A | A |
| OPOLE | 0,267 | E | E | D | E | E |
| SUB-CARPATHIAN | 0,364 | D | E | D | E | E |
| PODLASKIE | 0,244 | E | E | E | D | E |
| POMERANIAN | 0,667 | B | C | A | A | B |
| SILESIAN | 1,000 | A | A | B | C | A |
| ŚWIĘTOKRZYSKIE | 0,000 | F | F | F | F | F |
| WARMIAN-MAZURIAN | 0,206 | E | F | D | C | E |
| GREATER POLAND | 0,489 | D | D | C | D | C |
| WESTERN POMERANIAN | 0,587 | C | C | C | A | C |

Source: own study based on the results of statutory research of the Collegium of Business Administration, carried out in 2015. under 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 and repairs | Accommodation and catering | Professional, scientific and technical activity |
| Counties | | | | | | |
| city of Toruń | 0,335 | A | A | A | A | A |
| city of Włocławek | 0,301 | A | A | A | B | A |
| city of Bydgoszcz | 0,294 | A | A | A | C | A |
| city of Grudziądz | 0,293 | A | A | A | D | A |
| Bydgoszcz | 0,234 | C | C | D | D | D |

Source: own study based on the results of statutory research of the Collegium of Business Administration, carried out in 2015. under 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 and repairs | Accommodation and catering | Professional, scientific and technical activity |
| Urban communes | | | | | | |
| Toruń (u) | 0,262 | A | A | A | A | A |
| Inowrocław (u) | 0,254 | A | A | A | C | A |
| Bydgoszcz (u) | 0,243 | A | A | A | B | A |
| Grudziądz (u) | 0,241 | A | A | A | C | A |
| Włocławek (u) | 0,238 | A | A | A | B | A |
| Wąbrzeźno (u) | 0,236 | A | A | A | C | A |
| Chełmno (u) | 0,235 | A | A | A | A | A |
| Chełmża (u) | 0,233 | A | A | A | D | A |
| Ciechocinek (u) | 0,232 | A | A | A | A | A |
| Golub-Dobrzyń (u) | 0,224 | A | A | A | B | A |
| Brodnica (u) | 0,216 | A | A | A | C | A |
| Radziejów (u) | 0,205 | B | A | B | D | A |
| Kowal (u) | 0,202 | B | A | B | D | B |
| Rypin (u) | 0,201 | B | B | B | D | A |
| Aleksandrów Kujawski (u) | 0,196 | B | B | B | D | A |
| Lipno (u) | 0,185 | C | C | C | E | B |
| Rural communes | | | | | | |
| Osielsko (r) | 0,217 | A | A | B | A | A |
| Białe Błota (r) | 0,202 | B | B | B | A | B |
| Wielka Nieszawka (r) | 0,200 | B | B | C | B | B |
| Łysomice (r) | 0,190 | B | B | C | B | C |
| Lubicz (r) | 0,180 | C | C | C | D | C |
| Fabianki (r) | 0,179 | C | C | D | D | C |
| Białe Błota (r) | 0,202 | B | B | B | A | B |
| Wielka Nieszawka (r) | 0,200 | B | B | C | B | B |
| Łysomice (r) | 0,190 | B | B | C | B | C |
| Lubicz (r) | 0,180 | C | C | C | D | C |
| Fabianki (r) | 0,179 | C | C | D | D | C |
| Urban-rural communes | | | | | | |
| Solec Kujawski (u-r) | 0,233 | A | A | A | A | A |
| Barcin (u-r) | 0,222 | A | A | B | D | A |
| Świecie (u-r) | 0,216 | A | A | B | B | A |
| Janikowo (u-r) | 0,199 | B | B | B | D | B |
| Nakło nad Notecią (u-r) | 0,190 | B | C | C | D | B |

Regional investment attractiveness 2015

| | | | | | | |
|--------------------------|-------|---|---|---|---|---|
| Tuchola (u-r) | 0,181 | C | C | C | C | B |
| Pakość (u-r) | 0,180 | C | C | C | E | C |
| Kruszwica (u-r) | 0,177 | C | C | C | F | C |
| Mogilno (u-r) | 0,175 | C | C | D | E | C |
| Żnin (u-r) | 0,173 | C | C | C | D | C |
| Nowe (u-r) | 0,169 | C | D | D | D | C |
| Sępólno Krajeńskie (u-r) | 0,169 | C | D | D | C | 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), 2015.

Table 4. EFFECTS OF SPECIAL ECONOMIC ZONES FUNCTIONING AT THE END OF 2014

| SEZ | County, commune | Cumulated capital expenditure in million PLN | New jobs number | Leading industries (at least 20% share of revenue or employment) |
|------------|--------------------------------------|--|-----------------|--|
| Pomeranian | Brodnica, city of Brodnica | - | - | no leading industry |
| Pomeranian | Golub-Dobrzyń, Kowalewo Pomorskie | 361 518 556,00 | 1 098 | paper and paper products, rubber and plastics, |
| Pomeranian | Inowrocław, city of Inowrocław | 36 264 570,94 | 478 | other mining and quarrying products |
| Pomeranian | City of Bydgoszcz, city of Bydgoszcz | 243 786 521,40 | 297 | paper and paper products, fabricated metal products, except machinery and equipment, |
| Pomeranian | City of Grudziądz, city of Grudziądz | 167 645 483,00 | 119 | paper and paper products |
| Pomeranian | City of Toruń, city of Toruń | - | - | no leading industry |
| Pomeranian | City of Włocławek, city of Włocławek | 387 588 311,00 | 333 | chemicals and chemical products |
| Pomeranian | Rypin, city of Rypin | 7 242 413,05 | 11 | groceries |
| Pomeranian | Świecie, Świecie | 1 378 334 774,00 | 1 315 | paper and paper products |
| Pomeranian | Toruń, Łysomice | 498 215 029,42 | 811 | rubber and plastics, metals, computers, electronic and optical products |
| Pomeranian | Wąbrzeźno, Wąbrzeźno | 1 043 040,00 | 1 | machinery and equipment nec |
| Pomeranian | Żnin, Barcin | 302 731 910,38 | 671 | products of other non-metallic mineral products |

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

Table 5. UNIVERSITIES, FACULTIES AND ITS CATEGORIES

| School name | Ministry of Science and Higher Education Category |
|--|--|
| Feliks Nowowiejski Academy of Music in Bydgoszcz | B – Faculty of Composition, Theory of Music and Sound Engineering |
| | B – Faculty of Conducting, Jazz Music and Music Education |
| | B – Faculty of Instrumental Music |
| | C – Faculty of Vocal Music and Drama |
| University of Bydgoszcz | no data |
| Kolegium Jagiellońskie – Toruńska Szkoła Wyższa | no data |
| Kuyavian University in Włocławek | no data |
| Kujawy and Pomorze University in Bydgoszcz | no data |
| Państwowa Wyższa Szkoła Zawodowa in Włocławek | no data |
| Toruńska Wyższa Szkoła Przedsiębiorczości headquartered in Toruń | no data |
| Uczelnia im. Edwarda Herzberga z headquartered in Grudziądz | no data |
| Kazimierz Wielki University in Bydgoszcz | B – Faculty of Pedagogy and Psychology |
| | B – Faculty of Administration and Social Sciences |
| | B – Faculty of Natural Sciences |
| | B – Faculty of Mathematics, Physics & Technical Science |
| | B – Institute of Music education |
| | B – Faculty of Humanities |
| | C – Faculty of Physical Education, Health and Tourism |
| Nicolaus Copernicus University in Toruń | A + – Faculty of Humanities |
| | A – Faculty of Theology |
| | A – Faculty of History |
| | A – Faculty of Pedagogy |
| | A – Faculty of Political Sciences and International Studies |
| | A – Faculty of Chemistry |
| | A – Faculty of Physics, Astronomy and Informatics |
| | A – Faculty of Mathematics and Computer Science |
| | A – Faculty of Fine Arts |
| | A – Ludwik Rydygier Collegium Medicum in Bydgoszcz; |

| | |
|---|--|
| | Faculty of Medicine |
| | A – Ludwik Rydygier Collegium Medicum in Bydgoszcz; Faculty of Pharmacy |
| | B – Ludwik Rydygier Collegium Medicum in Bydgoszcz; Faculty of Health Sciences |
| | B – Faculty of Economic Sciences and Management |
| | B – Faculty of Languages |
| | B – Faculty of Law and Administration |
| | B – Faculty of Biology and Environmental Protection |
| | B – Faculty of Earth Sciences |
| UTP University of Science and Technology (Uniwersytet Technologiczno-Przyrodniczy - the UTP) in Bydgoszcz | B – Faculty of Animal Breeding and Biology |
| | B – Faculty of Agriculture and Biotechnology |
| | B – Faculty of Civil and Environmental Engineering |
| | B – Faculty of Telecommunications and Electrical Engineering |
| | B – Faculty of Chemical Technology and Engineering |
| | B – Faculty of Mechanical Engineering |
| | B – Faculty of Management |
| WSB in Toruń | B – for the entire school |
| Higher School of Democracy in Grudziadz | no data |
| The Higher School of Hebrew Philology in Torun | no data |
| University of Economy in Bydgoszczy | B – for the entire school |
| Higher School of Foreign Languages in Świecie | no data |
| College of Social and Media Culture | no data |
| Higher School of Health Sciences in Bydgoszcz | no data |
| Wyższa Szkoła Służb Lotniczych in Bydgoszcz | no data |
| Higher School of Environmental Management in Tuchola | no data |

Source: Authors' own work based on the Official Journal of the Ministry of Science and Higher Education Warsaw, 9 July 2014 .; Item 38; Communication from the Minister of Science and Higher Education of July 4, 2014 year; of scientific terms granted to scientific institutions.

Editing and translation of the report: Paulina Mechło