

Warsaw School of Economics



# REGIONAL INVESTMENT ATTRACTIVENESS 2015

## Pomeranian Voivodship

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

Agnieszka Komor, Ph.D.

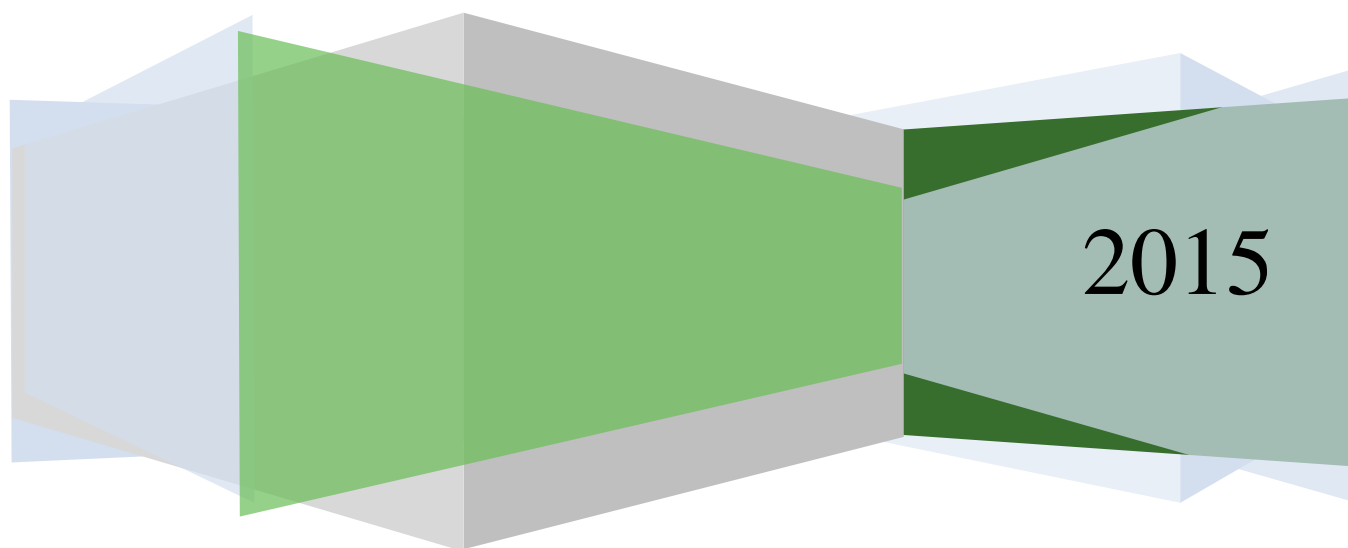
Dariusz Turek, Ph. D.

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](http://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](http://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](http://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: *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 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.<sup>1</sup>

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 POMERANIAN VOIVODSHIP

The economy of Pomeranian voivodship is one of the best developing regional economies in Poland. Its coastal location is conducive 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 [%]
<b>Market Potential</b>			
GDP per capita 2013 (PLN/person)	41685	43175	-
Population (persons) on 31 December 2014	2.302.077	38.478.602	6,0%
<b>Human Resources Potential</b>			
Higher education institutions graduates (persons) in 2014	26129	424317	6,2%
Secondary schools graduates (persons) in 2014	15215	271333	5,6%
Number of employed persons in 2014 (in thousands)	902	15859	5,7%
Structure of employed persons in 2013	agriculture 6,6% industry 33,0% services 60,4%	11,5% 30,5% 58,0%	
<b>Investment outlays and capital of companies with foreign capital participation in the voivodship</b>			
Investment outlays (PLN m) in 2013	3004,8	75105,1	4,0%
Capital of companies (PLN n) in 2013	8957,3	209130,1	4,3%
<b>Special Economic Zones (SEZs) in the voivodship</b>			
<ul style="list-style-type: none"> <li>- Pomeranian</li> <li>- Slupsk</li> </ul>			
<b>Distinguishing investment attractiveness ratings PAI_2 and RAI (class A, B and C)</b>			
Potential investment attractiveness PAI_2	The national economy class C Capital-intensive industry class B Industry laborious class B Trade and repairs class C Accommodation and catering class A		
Real investment attractiveness RAI	The national economy class C Industry class C Trade and repairs class C Professional scientific and technical activity class C		
<b>Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAII_GN)</b>			
Counties	class A	city of Gdańsk, city of Gdynia city of Slupsk, city of Sopot	

	class B	Gdańsk , Puck
<b>Communes</b>	class A	Chojnice (u), Człuchów (u), Gdańsk (u), Gdynia (u), Jastarnia (u), Kolbudy (r), Kosakowo (r), Kościerzyna (u), Krynica Morska (u), Kwidzyn (u), Lębork (u), Łeba (u), Malbork (u), Pruszcz Gdański (u), Pruszcz Gdański (r), Puck (u), Reda (u), Rumia (u), Słupsk (u), Sopot (u), Starogard Gdański (u), Tczew (u), Ustka (u), Wejherowo (u), Władysławowo (u)
	class B	Bytów (u-r), Hel (u), Kobylnica (r), Kościerzyna (r), Pszczółki (r), Skórcz (u), Słupsk (r), Ustka (r), Żukowo (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 4 in the Appendix.

Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 2302077 (as of 2014), which is 6% of the population of Poland. The age structure in the voivodship in 2014 was as follows: 19.5% of the population at pre-productive age, 62.8% at productive age and 17.7% at post-productive age (for Poland it was 18%, 63% and 18% respectively).

The main potential for human capital creation in the voivodship lies in 27 higher education institutions in which there are 98000 students studying, which makes up 6.7 % 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 Pomeranian voivodship 1 university faculty received the highest scientific category A +, is this: Faculty of Pharmacy and Laboratory Medicine at the Medical University of Gdansk; 12 faculties received the category - A; 31 faculties received a category - B; and 4 faculties of category - C. It is also worth mentioning that five universities had not received any category awarded by KEJNA (Appendix: Table. 5).

In addition, 12.7% of the secondary school students in the Pomeranian voivodship attend vocational schools and 28.4% attend technical schools.

The registered unemployment rate in the voivodship amounted to 9% in August 2015, compared to 9.7%<sup>2</sup> in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2015 amounted to PLN 3906.6, which is 104% of the average for Poland.

In 2013 Pomeranian voivodship made a contribution of 5.8% to the GDP of Poland. Calculated per capita, it amounted to PLN 41685 with the average for Poland PLN 43175. With this result the voivodship takes the 5th place in the country. The GDP growth rate in the voivodship in the years 2003-2013 amounted to 202% while the average for Poland amounted to 197%.

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

In comparison to the whole country the structure of employment in the voivodship is characterised by a share of service sector at the level of 60.4% whereas a share of the agricultural and industrial sectors are respectively 6.6% and 33% (Central Statistical Office, Local Data Bank 2015).

In the structure of voivodship's industry important role is played by: manufacture of food products (13% of the value of sold production of industry all over the region at the end of 2014), manufacture of computer, electronic and optical products (8%), the supply of electricity, gas and water (6%) and manufacture of metal products (6%).<sup>3</sup>

As a coastal region Pomeranian voivodship has a significant share of the national output section "manufacture of other transport equipment". This share amounted in 2014 to 17%.

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

- manufacture of computer, electronic and optical products (18%),
- manufacture of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials (8%),
- manufacture of fabricated metal products, except machinery and equipment (7%),
- machinery and equipment (6%).

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

---

<sup>3</sup> Calculations based on Statistical Bulletin for the voivodship, first quarter 2015 and first quarter of Statistical Bulletin 2015 [www.stat.gov.pl](http://www.stat.gov.pl) (10/11/2015).



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).

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](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 above average of overall investment attractiveness, which is indicated by the high rank (class C) according to the main potential investment attractiveness index calculated for the whole regional economy PAI 2\_GN (see Table 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 repairs (class C), accommodation and catering (class A), 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 6<sup>th</sup> place of voivodship in Poland in terms of the share capital of entities with foreign capital, thanks to the acquisition of 4.3% of the inflow (based on data for the year 2013).

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.<sup>4</sup>

---

<sup>4</sup>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/>

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 136 items of 270 European regions.

The strongest part of the Pomeranian voivodship is human capital (class A), in which the region was classified on the 23rd 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:** Burgenland, Niederösterreich;
- **in Belgium:** Prov. Hainaut, Prov. Limburg, Prov. Luxembourg;
- **in Great Britain:** Cornwall and Isles of Scilly, Cumbria, Devon, Dorset and Somerset, East Yorkshire and Northern Lincolnshire, Highlands and Islands, Lincolnshire, Northern Ireland, Shropshire and Staffordshire, Tees Valley and Durham, West Wales and The Valleys;
- **in Bulgaria:** Severen tsentralen, Severoiztochen, Severozapaden, Yugoiztochen, Yuzhen tsentralen;
- **in Czech Republic:** Jihozápad, Moravskoslezsko, Severozápad, Střední Morava;
- **in Denmark:** Sjælland;
- **in France:** Basse-Normandie, Bourgogne, Champagne-Ardenne, Guadeloupe, Guyane, Haute-Normandie, Limousin, Lorraine, Martinique, Nord - Pas-de-Calais, Picardie, Poitou-Charentes, Réunion;
- **in Greece:** Anatoliki Makedonia, Thraki, Dytiki Ellada, Dytiki Makedonia, Ionia Nisia, Ipeiros, Kentriki Makedonia, Kriti, Notio Aigaio, Peloponnisos, Sterea Ellada, Thessalia, Voreio Aigaio;
- **in Spain:** Andalucía, Canarias, Castilla y León, Castilla-La Mancha, Ciudad Autónoma de Ceuta, Comunidad Valenciana, Extremadura, Galicia, Illes Balears, Principado de Asturias, Región de Murcia;
- **in The Netherlands:** Drenthe, Friesland, Zeeland;
- **in Ireland:** Border, Midland and Western;
- **in Lithuania:** Lietuva;
- **in Latvia:** Latvija;
- **in Germany:** Arnsberg, Brandenburg, Chemnitz, Kassel, Koblenz, Lüneburg, Mecklenburg-Vorpommern, Münster, Oberfranken, Saarland, Sachsen-Anhalt, Schleswig-Holstein, Thüringen, Trier, Weser-Ems;
- **in Portugal:** Alentejo, Algarve, Centro, Norte, 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:** Stredné Slovensko, Východné Slovensko, Západné Slovensko;
- **in Slovenia:** Vzhodna Slovenija;
- **in Hungary:** Dél-Alföld, Dél-Dunántúl, Észak-Alföld, Észak-Magyarország, Közép-Dunántúl, Nyugat-Dunántúl;
- **in Italy:** Abruzzo, Basilicata, Calabria, Campania, Marche, Molise, Provincia Autonoma Bolzano/Bozen, Puglia, Sardegna, Sicilia, Toscana, Umbria, Valle d'Aosta/Vallée d'Aoste, Veneto.

### 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 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 counties were: Gdańsk, Gdynia, Sopot and counties (distinguished with orange star) are: Gdańsk, Puck and city of Słupsk.

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

- **distinguished with a golden star:** Gdańsk (u), Gdynia (u), Jastarnia (u), Kwidzyn (u), Puck (u), Reda (u), Sopot (u), Ustka (u), Wejherowo (u), Władysławowo (u),
- **distinguished with an orange star:** Chojnice (u), Czarna Woda (u), Człuchów (u), Hel (u), Kościerzyna (u), Krynica Morska (u), Lębork (u), Łeba (u), Malbork (u), Pruszcz Gdański (u), Rumia (u), Słupsk (u), Starogard Gdański (u), Tczew (u).

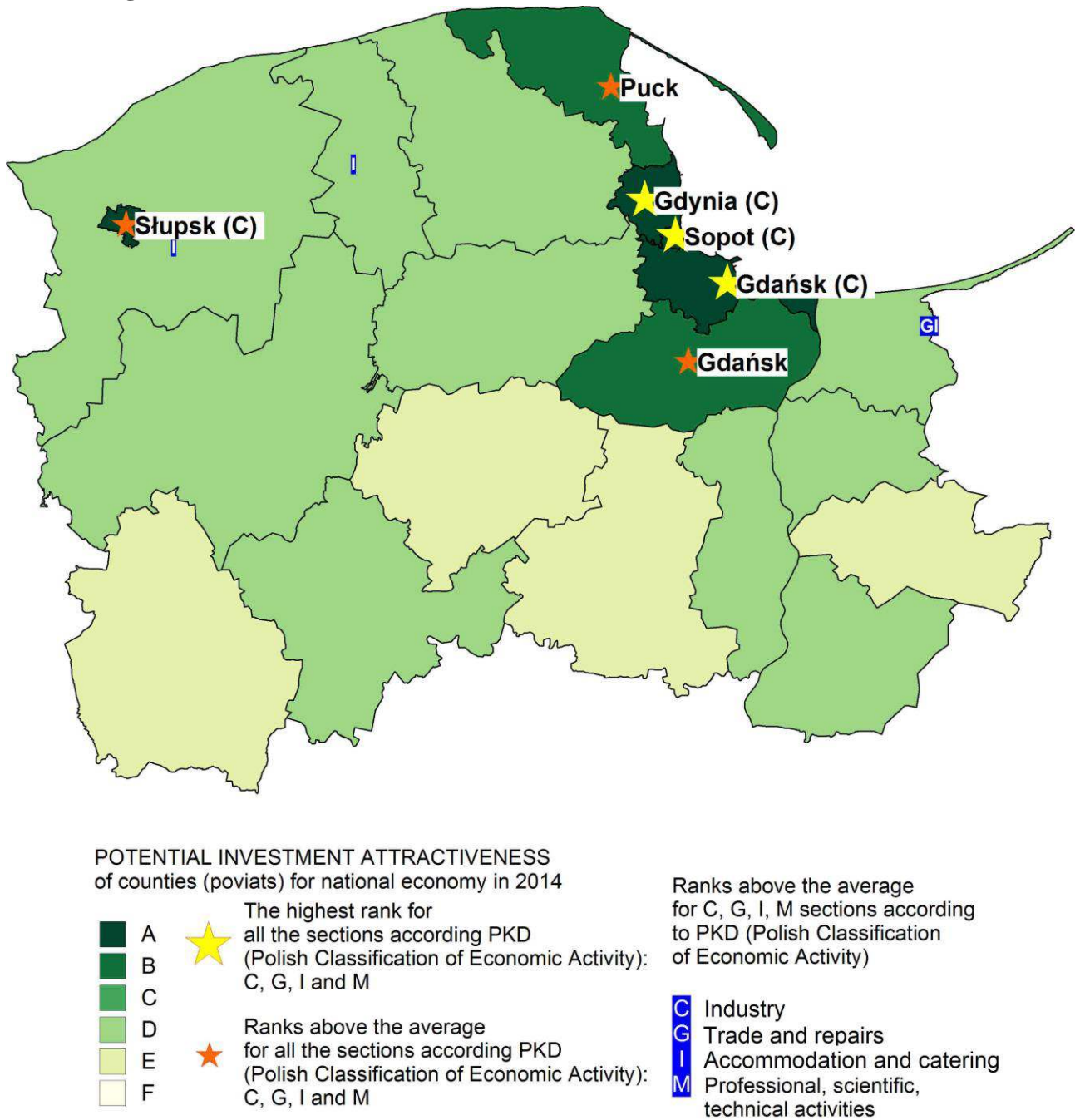
**Among rural communes** the highest rank communes include:

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

**Among urban-rural communes** the highest rank communes include:

- **orange star communes:** Bytów (u-r), Żukowo (u-r).

**Chart 1. Potential investment attractiveness of counties of Pomeranian voivodship, considering the most attractive sections**

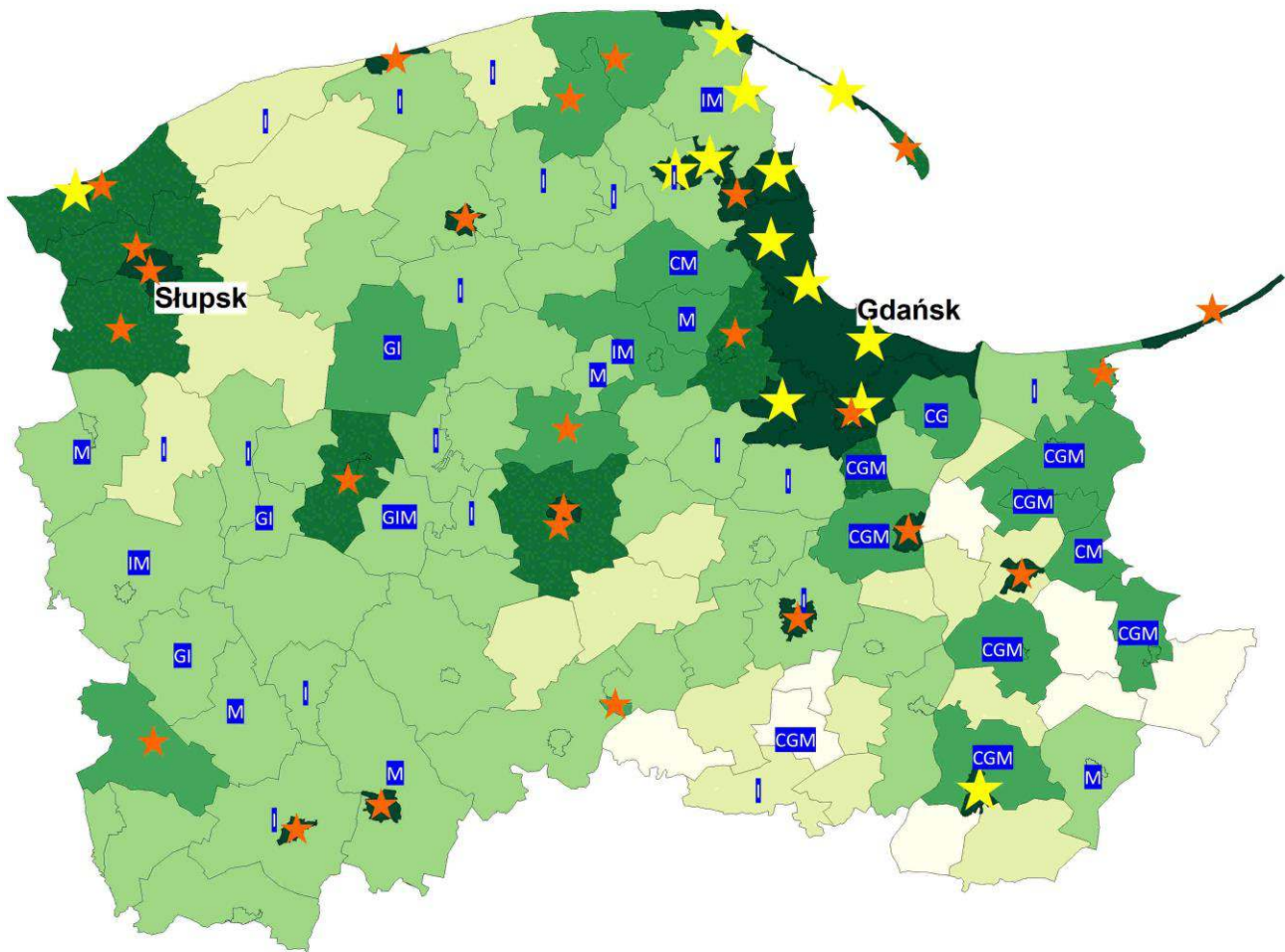


**Golden star counties:**

Gdynia, Sopot, Gdańsk

Source: Authors' own work.

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



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

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #004d00; margin-right: 5px;"></span> A</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #008000; margin-right: 5px;"></span> B</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #00b050; margin-right: 5px;"></span> C</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #90ee90; margin-right: 5px;"></span> D</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #f0f0d0; margin-right: 5px;"></span> E</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #fff2cc; margin-right: 5px;"></span> F</li> </ul> | <ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #ffff00; border: 1px solid black; margin-right: 5px;"></span> The highest rank for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #ffa500; border: 1px solid black; margin-right: 5px;"></span> Ranks above the average for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M</li> </ul> |
|--|---|

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

- |   |
|---|
| <ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #0000ff; color: white; text-align: center; line-height: 15px; font-size: 10px; margin-right: 5px;">C</span> Industry</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #0000ff; color: white; text-align: center; line-height: 15px; font-size: 10px; margin-right: 5px;">G</span> Trade and repairs</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #0000ff; color: white; text-align: center; line-height: 15px; font-size: 10px; margin-right: 5px;">I</span> Accommodation and catering</li> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #0000ff; color: white; text-align: center; line-height: 15px; font-size: 10px; margin-right: 5px;">M</span> Professional, scientific, technical activities</li> </ul> |
|---|

**Golden star communes:**

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

Source: Authors' own work.

### 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 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](http://www.investinpomerania.pl)



**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](http://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. e Board has set up two foundations: Foundation Institute for Development Project and the Foundation for eco-energy solutions (FREE). Furthermore, the Board conducts Entrepreneurship Development Fund, as well as arbitration and mediation center.

**Business Centre Club – Gdansk Lodge ([www.bcc.org.pl](http://www.bcc.org.pl))**

BCC is an organization of business 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. 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/](http://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 Kwidzyna (<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. KPPT is also the business incubator will offer business support institutions, training and exhibition center, and comprehensively developed investment areas. Park offer includes office, production and services for emerging and operating micro-enterprises and SMEs with a comprehensive consulting and business support and administration. In addition KPPT offers space technology and on-site computer (Data Center). The park operates Renewable Energy Centre (CEO) and designed to support the development of renewable energy in the region and the country, as well as having to serve preparation support staff in enterprises and institutions implementing renewable energy equipment. The park offers for sale fully developed investment plots with a total area of 17 hectares with the new road infrastructure. Purchasers of such plots may at preferential pricing the services offered in the Park are.: renting conference and training rooms and exhibition space in the media center, access to research facilities, opportunities to participate in park-platform collaboration and knowledge transfer, advice by business environment institutions clustered in the Park.

### **Science and Technology Park in Gdańsk ([www.gpnt.pl](http://www.gpnt.pl))**

Gdansk Science and Technology Park consists of three buildings in the area which are located in offices, manufacturing, warehouse, laboratory and social, as well as Training and Conference Centre, EduPark (Centre for Education of Children and Youth), EduPrzed szkole and EduŻłobek. As part of the Incubator Technology Park for micro, small and medium-sized enterprises which are in early stages of development (up to two years of economic activity from the moment of registration). The park offers co-working space, Virtual Office services and Data Center. Within the park is functioning Gdansk Life Sciences Center, to develop research projects in the field of biotechnology, medicine and preventive health, which are intended for commercialization by the Polish enterprise based on development partnerships with science centers in Poland and abroad. Investors may in the Park benefit from state 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](http://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, 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. ARP offers deployment of financial support instruments for SMEs (promoting and providing information on ongoing programs, grant support grant applications, including formal and substantive) to support the development of enterprise (SME sector research, providing support in kind, expert and finance projects of innovative early stage of development - Capital Fund Pomerania Development Agency, providing consultation and information on the possibilities and procedures for the use of European funds and the establishment, implementation of projects aimed at promoting entrepreneurship, support of raising funds for project implementation), and also promote the region and investor services (services for investors interested in the activity in

Pomerania, business missions, preparation and execution of regional promotion, publishing regional economic information and statistics).

### **3.2. 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 2014 the areas of the SEZ were parts of 9 cities and 9 communes – see Chart 3.

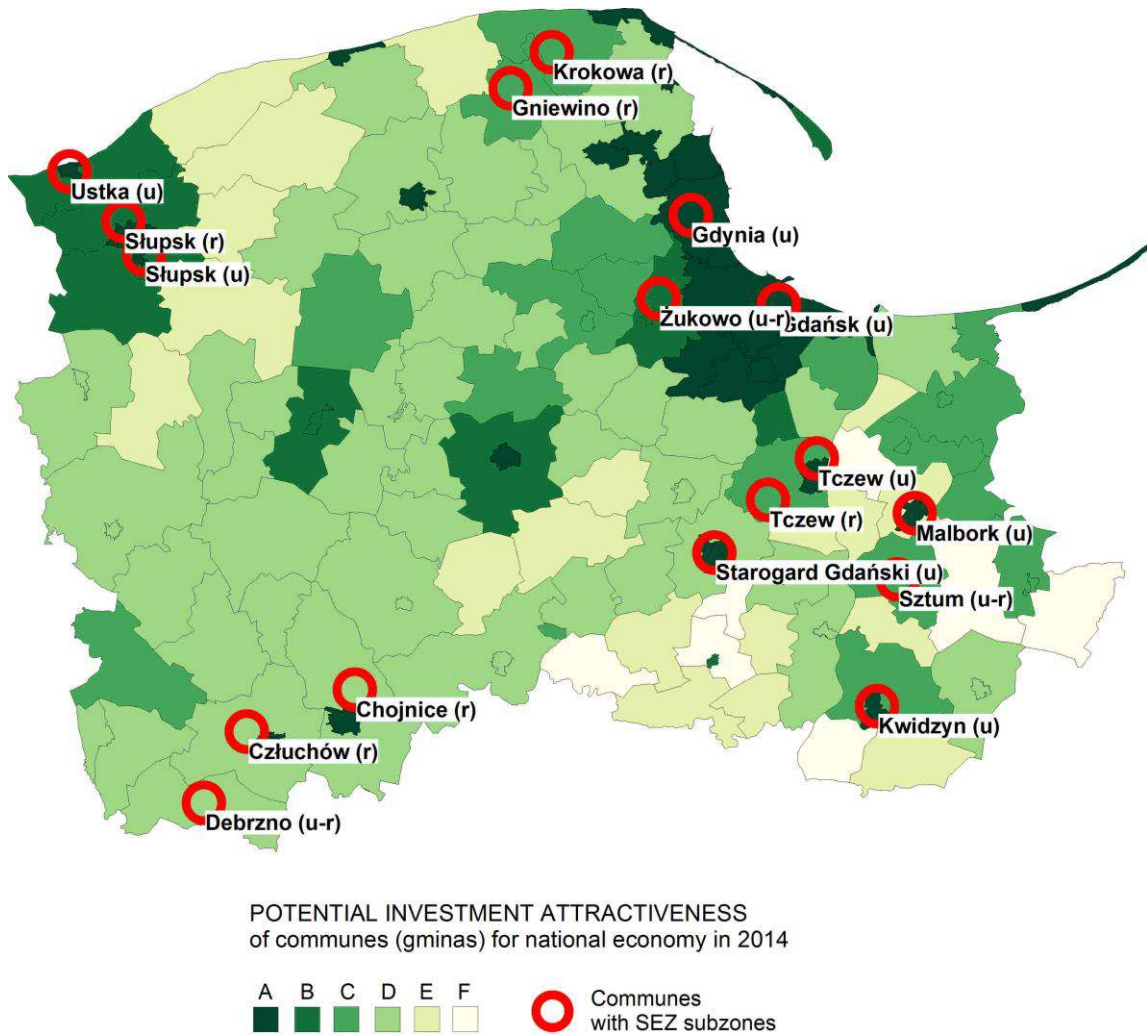
The first SEZ was created in 1997. Till the end of 2014 the enterprises operating in the Pomeranian and Słupsk SEZ's subzones have invested PLN 4.6 bln in this area which is 4% of all investment outlays in the Polish SEZs. In the same time the enterprises created 13.1 thousand new jobs in the region, which was 4% 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 ASEZmby 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).

**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.

Chart 3. The location of SEZs in Pomeranian voivodship



Source: Authors' own work.

## 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
<b>Voivodships</b>						
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: Authors on the basis of the results of statutory research carried out in Collegium of Business Administration under the guidance of H. Godlewska-Majkowska (2015).

**Table 2 . POTENTIAL INVESTMENT ATTRACTIVENESS OF POLISH COUNTIES FOR THE NATIONAL ECONOMY AND ITS SELECTED SECTIONS**

County	PAII_GN	PAII_GN	PAII_C	PAII_G	PAII_I	PAII_M
	National economy	National economy	Industry	Trade and repairs	Accommodation and catering	Professional, scientific and technical activity
<b>Counties</b>						
City of Sopot	0,354	A	A	A	A	A
City of Gdańsk	0,334	A	A	A	A	A
City of Słupsk	0,307	A	A	A	B	A
City of Gdynia	0,299	A	A	A	A	A
Gdańsk	0,262	B	B	C	C	C
Puck	0,252	B	C	B	A	C

Source: Authors on the basis of the results of statutory research carried out in Collegium of Business Administration under the guidance of H. Godlewska-Majkowska (2015).

**TABLE 3. POTENTIAL INVESTMENT ATTRACTIVENESS OF COMMUNES OF POMERANIAN VOIVODSHIP FOR THE NATIONAL ECONOMY AND SELECTED SECTIONS**

Commune	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
	National economy	National economy	Industry	Trade and repairs	Accommodation and catering	Professional, scientific and technical activity
<b>Urban communes</b>						
Sopot (u)	0,274	A	A	A	A	A
Pruszcz Gdański (u)	0,271	A	A	A	B	A
Gdańsk (u)	0,263	A	A	A	A	A
Tczew (u)	0,258	A	A	A	B	A
Malbork (u)	0,256	A	A	A	B	A
Słupsk (u)	0,254	A	A	A	B	A
Lębork (u)	0,249	A	A	A	C	A
Puck (u)	0,249	A	A	A	A	A
Starogard Gdański (u)	0,248	A	A	A	B	A
Ustka (u)	0,244	A	A	A	A	A
Gdynia (u)	0,243	A	A	A	A	A
Kwidzyn (u)	0,243	A	A	A	A	A
Wejherowo (u)	0,242	A	A	A	A	A
Chojnice (u)	0,237	A	A	A	C	A
Rumia (u)	0,236	A	A	A	B	A
Władysławowo (u)	0,234	A	A	A	A	A
Krynica Morska (u)	0,231	A	A	A	A	B
Jastarnia (u)	0,229	A	A	A	A	A
Reda (u)	0,215	A	A	A	A	A
Człuchów (u)	0,213	A	A	A	B	A
Kościerzyna (u)	0,210	A	A	A	C	A
Łeba (u)	0,210	A	A	A	A	B
Skórcz (u)	0,194	B	B	B	D	B
Hel (u)	0,190	B	B	B	A	C
Czarna Woda (u)	0,181	C	C	C	C	C
<b>Rural communes</b>						
Kosakowo (r)	0,240	A	A	A	A	A
Pruszcz Gdański (r)	0,230	A	A	A	A	A
Kolbudy (r)	0,213	A	A	A	A	A
Słupsk (r)	0,198	B	B	B	B	B
Kobylnica (r)	0,193	B	B	B	A	C

Pszczółki (r)	0,191	B	B	B	D	B
Ustka (r)	0,191	B	B	B	A	C
Kościerzyna (r)	0,190	B	B	C	B	C
Gniewino (r)	0,188	C	B	B	B	C
Tzew (r)	0,185	C	C	C	D	B
Stężycza (r)	0,182	C	C	B	B	C
Sztutowo (r)	0,182	C	C	B	A	C
Krokowa (r)	0,181	C	C	C	A	C
Stare Pole (r)	0,177	C	C	D	E	C
Cedry Wielkie (r)	0,176	C	C	C	D	D
Kwidzyn (r)	0,173	C	C	C	D	C
Szemud (r)	0,172	C	C	D	D	C
Przodkowo (r)	0,171	C	D	D	D	C
Rzeczenica (r)	0,171	C	C	C	B	C
Czarna Dąbrówka (r)	0,170	C	D	C	B	D
<b>Urban-rural communes</b>						
Żukowo (u-r)	0,197	B	B	B	B	B
Bytów (u-r)	0,196	B	B	B	B	A
Sztum (u-r)	0,182	C	C	C	D	B
Nowy Dwór Gdański (u-r)	0,182	C	C	C	E	C
Nowy Staw (u-r)	0,179	C	C	C	F	C
Dzierżgoń (u-r)	0,176	C	C	C	D	C
Kartuzy (u-r)	0,171	C	D	D	C	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), 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	Chojnice, Chojnice	60 579 057,00	36	products of other non-metallic mineral products
Słupsk	Człuchów, Czarne	-	-	no leading industry
Pomeranian	Człuchów, Człuchów	-	-	no leading industry
Słupsk	Człuchów, Debrzno	-	-	no leading industry
Pomeranian	Kwidzyn, city of Kwidzyn	1 259 116 952,00	2 816	paper and paper products, computers, electronic and optical products,
Pomeranian	City of Gdańsk, city of Gdańsk	521 392 107,40	280	paper and paper products
Pomeranian	City of Gdynia, city of Gdynia	161 027 399,60	448	fabricated metal products, except machinery and equipment
Słupsk	City of Słupsk, city of Słupsk	322 867 959,85	1 109	fabricated metal products, except machinery and equipment, storage and transportation support services
Pomeranian	City of Malbork, city of Malbork	83 262 978,00	58	chemicals and chemical products
Pomeranian	Puck, Krokowa	171 403 854,39	770	groceries, Metals
Słupsk	Słupsk, Słupsk	228 047 390,46	677	groceries, warehousing and transportation support services
Słupsk	Słupsk, city of Ustka	-	-	no leading industry
Pomeranian	Starogard Gdański, city of Czarna Woda	24 244 841,75	191	wood and products of wood and cork, except furniture; articles of straw and materials of a kind used for plaiting



Pomeranian	Starogard Gdański, city of Starogard Gdański	669 221 731,00	1 844	basic pharmaceutical products, medicines and other pharmaceutical products
Pomeranian	Sztum, Sztum	451 630,00	-	groceries
Pomeranian	Tczew, Tczew	137 125 622,41	907	rubber and plastic products other non- metallic mineral
Pomeranian	Tczew, Tczew	925 461 361,36	4 016	computers, electronic and optical products

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

**TABLE 5. UNIVERSITIES, FACULTIES AND ITS CATEGORIES**

School name	Category of the Ministry of Science and Higher Education
SWPS University of Social Sciences and Humanities in Sopot	B - for the entire faculty
The heroes of Westerplatte Naval Academy	B - Faculty of Humanities and Social Sciences
	B – Faculty of Command and Marine Operations
	B - Faculty of Navigation and Naval Armaments
	B - Faculty of Mechanical and Electrical
Gdynia Maritime University	B - Faculty of Electrical Engineering
	B - Faculty of Navigation
	B - Faculty of Mechanical Engineering
	B - Faculty of Business Administration and Commodity
Stanislaw Moniuszko Academy of Music in Gdansk	A - Choral Conducting, Music Education and Eurhythmics
	B - Faculty of Conducting, Composition and Music Theory
	B - Vocal and Acting Faculty
	B – Instrumental Faculty
Pomeranian Academy in Slupsk	B - Faculty of Philology and History
	B - Faculty of Education and Philosophy
	C - Faculty of Mathematics and Natural Sciences
Academy of Fine Arts in Gdansk	B - Faculty of Painting
	B - Faculty of Sculpture
	C - Faculty of Architecture and Design
Sniadecki Academy of Physical Education and Sports in Gdansk	B - Faculty of Tourism and Recreation
Athenaeum - Higher School in Gdańsk	B - Faculty of European Studies, Political Science and Journalism
	C - Faculty of Educational Studies
The European School in Sopot	no data
Gdansk School based in Gdansk	no data
Gdańsk Higher School of Humanities	no data

Medical University of Gdansk	A + - Faculty of Pharmacy and Laboratory Medicine
	A - Faculty of Medicine and Dentistry
	A - Faculty of Health Sciences Division of Nursing and Institute of Marine and Tropical Medicine
Kashubian-Pomeranian University in Wejherowo	no data
Gdansk University of Technology	A - Faculty of Civil and Environmental Engineering
	A - Faculty of Architecture
	A - Faculty of Chemistry
	A - Faculty of Electronics, Telecommunications and Informatics
	B –Faculty of Ocean Engineering and Ship
	B - Faculty of Electrical Engineering and Automation
	B - Faculty of Technical Physics and Applied Mathematics
	B - Faculty of Mechanical Engineering
B - Faculty of Management and Economics	
Pomeranian University in Starogard Gdanski	no data
Pomeranian University of Applied Sciences in Gdynia	no data
Powiślańska School in Kwidzyn	no data
Universal College of Humanities "Pomerania" in Chojnice	no data
Sopot School in Sopot	no data
University of Gdansk	A - Faculty of History
	A – Faculty of Biology
	A - Faculty of Chemistry
	A - Faculty of Law and Administration
	A - Intercollegiate Faculty of Biotechnology of University of Gdańsk and Medical University of Gdańsk
	B - Faculty of Social Sciences
	B - Faculty of Mathematics, Physics and Informatics
	B - Faculty of Oceanography and Geography

	B – Faculty of Management
	B - Faculty of Economics
	B - Faculty of Philology
The Hanseatic Higher School of Management in Slupsk	no data
Eugeniusz Kwiatkowski College of Business and Administration Gdynia	no data
School of Banking in Gdansk	B - Faculty of Finance and Management
College of Engineering Economics in Slupsk	no data
School of Social Communication in Gdynia	no data
Higher School of Social and Economics in Gdansk in Gdansk	no data
School of Tourism and Hotel Management in Gdansk	no data
School of Management in Gdansk	B – Faculty of Computer Science and Management
	C – Faculty of Physiotherapy and Health Sciences

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.

Translation and editing of the report: Paulina Mechło