

Warsaw School of Economics



REGIONAL INVESTMENT ATTRACTIVENESS 2015

Western Pomeranian Voivodship

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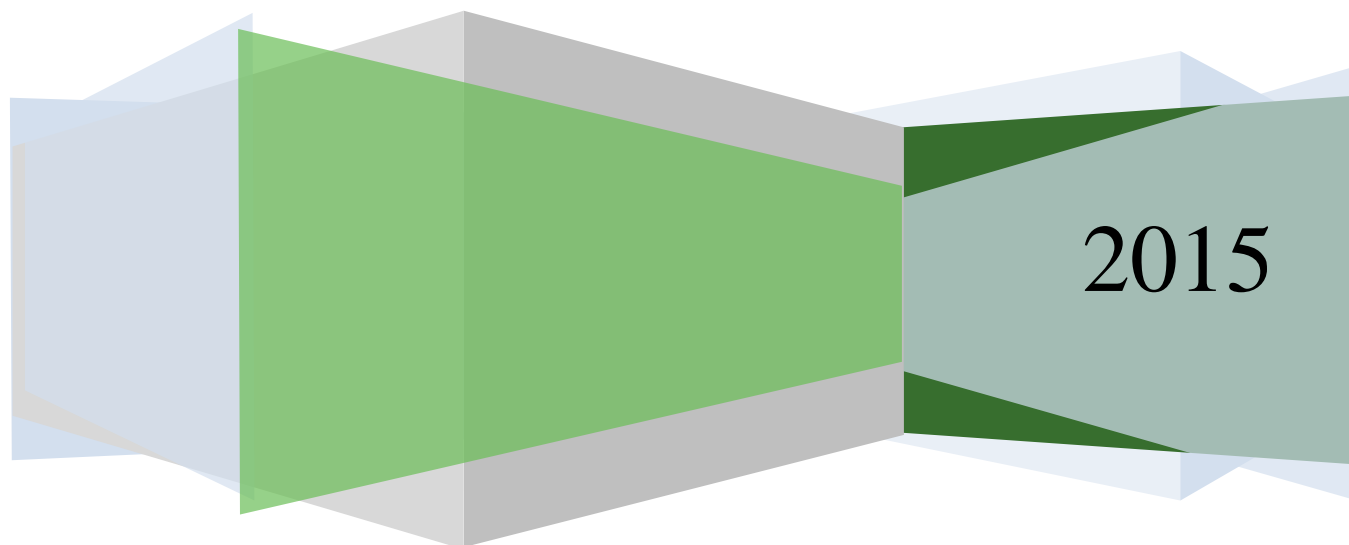
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Invest
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POLISH INFORMATION AND
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- care of the investors operating in the country, including the reinvestment.

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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**.

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INTRODUCTION

The report has been prepared to order of the Polish Information and Foreign Investment Agency and is the next edition of the regional investment attractiveness reports. The reports have been published since 2008. They are the result of scientific research conducted since 2002 under the supervision of 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 the Western Pomeranian voivodship's territorial units can be compared to the other territorial units from all of the Polish regions as the calculations have been made for all of them.

In the third part of the report the main business environment institutions in the voivodship are presented, taking into consideration kinds of support which they offer to investors. This part also includes information on location of the Special Economic Zones (SEZs) in the voivodship and information on the results of their activities.

The 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.

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

1. THE PROFILE OF REGIONAL ECONOMY OF WESTERN POMERANIAN VOIVODSHIP

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

The main advantages of the voivodship are:

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

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

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

Feature	Western Pomeranian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2013. (PLN/person)	36340	43175	-
Population (persons) on 31 December 2014	1.715.431	38.478.602	4.5%
Human Resources Potential			
Higher education institutions graduates (persons) in 2014	14514	424317	3,4%

Regional investment attractiveness 2015

Secondary schools graduates (persons) in 2014	10497	271333	3,9%
Number of employed persons on 31 December 2014 (in thousands)	574	15859	3,6%
Structure of employed persons in 2013	agriculture 8.0% industry 29.2% services 62.8%		11.5.0% 30.5% 58.%
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in in 2013	2530,7	75105,1	3,4%
Capital of companies (PLN m) in 2013	5412,2	209130,1	2,6%
Special economic zones (SEZs) in the voivodship			
<ul style="list-style-type: none"> • Kostrzyn-Slubice • Slupsk • Mielec • Pomeranian 			
Distinguishing investment attractiveness ratings PAI 2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	Accommodation and catering Class A		
Real investment attractiveness RAI	National economy Class B Trade and repairs Class C Accommodation and catering Class C Professional, science and technical activities Class C		
Distinguished counties and communes according to PAI1_GN			
Counties	Class A	city of Koszalin, city of Szczecin, city of Świnoujście, Police	
	Class B	Kołobrzeg	
Communes	Class A	Białogard (u), Darłowo (u), Dębno (u-r), Dobra (Szczecińska) (r), Drawsko Pomorskie (u-r), Dziwnów (u-r), Gryfino (u-r), Karlino (u-r), Kołbaskowo (r), Kołobrzeg (u), Kołobrzeg (r), Koszalin (u), Mielno (r), Międzyzdroje (u-r), Nowe Warpno (u-r), Police (u-r), Rewal (r), Sławno (u), Stargard Szczeciński (u), Szczecin (u), Szczecinek (u), Świdwin (u), Świnoujście (u), Ustronie Morskie (r), Wałcz (u)	
	Class B	Barlinek (u-r), Biesiekierz (r), Bobolice (u-r), Borne Sulinowo (u-r), Goleniów (u-r), Świeszyno (r), Trzebiatów (u-r), Złocieniec (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 1.715.431 which is 4.5% of the population of Poland. The age structure in the voivodship in 2014 was as follows: 17,5% at preproductive age, 63.8% at productive age and 17.9% 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 19 higher education institutions in which there are 55000 students studying, which makes up 3.6% 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 Western Pomerania 7 faculties universities has received scientific category A; 30 faculties received a category - B; and 2 faculties category - C. It is also worth mentioning that 13 colleges had not received any category awarded by KEJNA (Appendix, table 5.).

In addition, 11.2% of the secondary school students in the voivodship attend vocational schools and 29.1% attend technical schools.

The registered unemployment rate in the voivodship amounted to 12.9 % in August 2015, compared to 9.7%² in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2015 amounted to PLN 3526.7, which is 94% of the average for Poland.

In 2013 Western Pomeranian voivodship made a contribution of 3.8 % to the GDP of Poland. Calculated per capita, it amounted to PLN 36340 with the average for Poland PLN 43175 . With this result the voivodship takes the 8th place in the country. The GDP growth rate in the voivodship in the years 2003-2013 amounted to 176% while the average for Poland amounted to 197 %.

In comparison with the whole country the structure of employment in the voivodship is characterised by service sector at the level of 62.8% whereas shares of the agricultural and industrial sectors are respectively 8.0% and 29.2% (Central Statistical Office, Local Data Bank 2015).

In the Western Pomeranian voivodship structure of industry several sectors stand out: food production (26% of the whole industry voivodship production in 2014), wood and cork products, , articles of straw and wicker (13%), metal products (9%) and manufacture of rubber and plastic products (6%).³ The region is a leading manufacturer of products of wood and cork, straw and wicker except furniture (14% of the national value of production sold in 2014).

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

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

³ Calculations based on Statistical Bulletin for the voivodship, first quarter 2015 and first quarter of Statistical Bulletin 2015 www.stat.gov.pl (10/11/2015).

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

The high opportunity sectors are:

- future services (ICT, KPO, R & D),
- marine activities and logistics,
- metal and machine industry,
- bio-economy (wood and furniture sector, agro-food, renewable energy, green chemistry),
- tourism and health.

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

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

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

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

Western Pomeranian voivodship is a coastal region, which has predispositions in development of tourism and maritime economy. This is why the region was ranked very high in terms of potential investment attractiveness for the accommodation and catering (class A) section.

Investment attractiveness can also be evaluated on the basis of indices of real investment attractiveness (RAI), which are based on microclimates such as: return on tangible assets, labour productivity, self-financing of self-government territorial units and investment outlays. The region was ranked above the average in terms of RAI indices for the national economy (class C), trade and repairs (class C), accommodation and catering (class C) and professional, scientific and technical activities (class C).

The evaluation of investment attractiveness is based on the methodology developed by the team of the Collegium of Business Administration within the statutory research of Warsaw School of Economics. The evaluation started in 2012 and is based on the measurement of the attractiveness of labour resources, market and innovation.⁴

Comparing to UE NUTS 2 regions Western Pomeranian voivodship has fairly low investment attractiveness (class E). The voivodship was classified on 221. place among 270 surveyed regions. A competitive advantage in the voivodship is human capital (class B).

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

Western Pomeranian voivodship is more attractive investment region than:

- **in 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:** Castilla-La Mancha, Extremadura;
- **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.

⁴ More: *Atrakcyjność inwestycyjna regionów Polski na tle Unii Europejskiej*, joint publication edited by H. Godlewska-Majkowska, Oficyna Wydawnicza SGH, Warszawa 2014 and <http://kolegia.sgh.waw.pl/pl/KNoP/struktura/IP/struktura/ZOB/>

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.

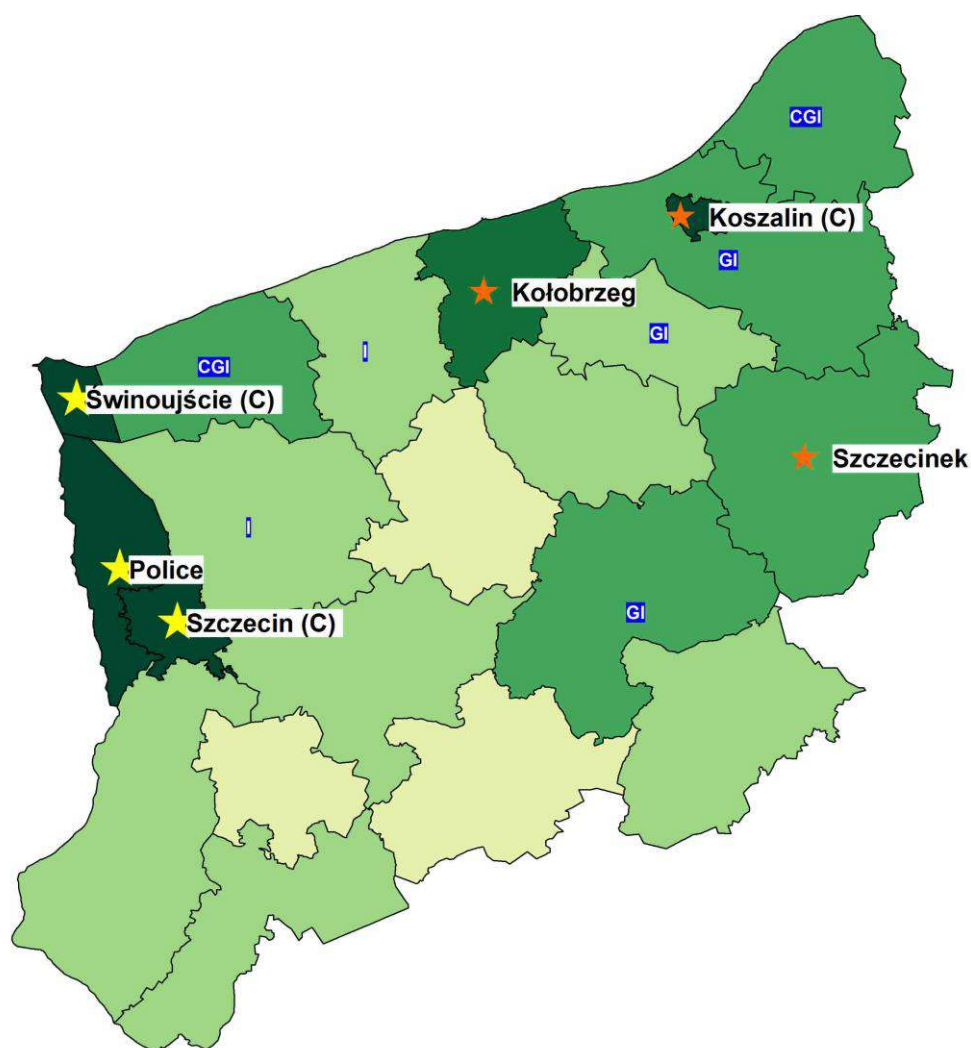
Market conditions informs on market absorptive power that means the number of potential customers and indirectly on their wealth that means ability to buy goods and services. Environment conditions were rated as they are a basic factor influencing tourism development and citizens' life quality.

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

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

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



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

- A
 - B
 - C
 - D
 - E
 - F
- ★ The highest rank for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M
- ★ Ranks above the average for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M

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

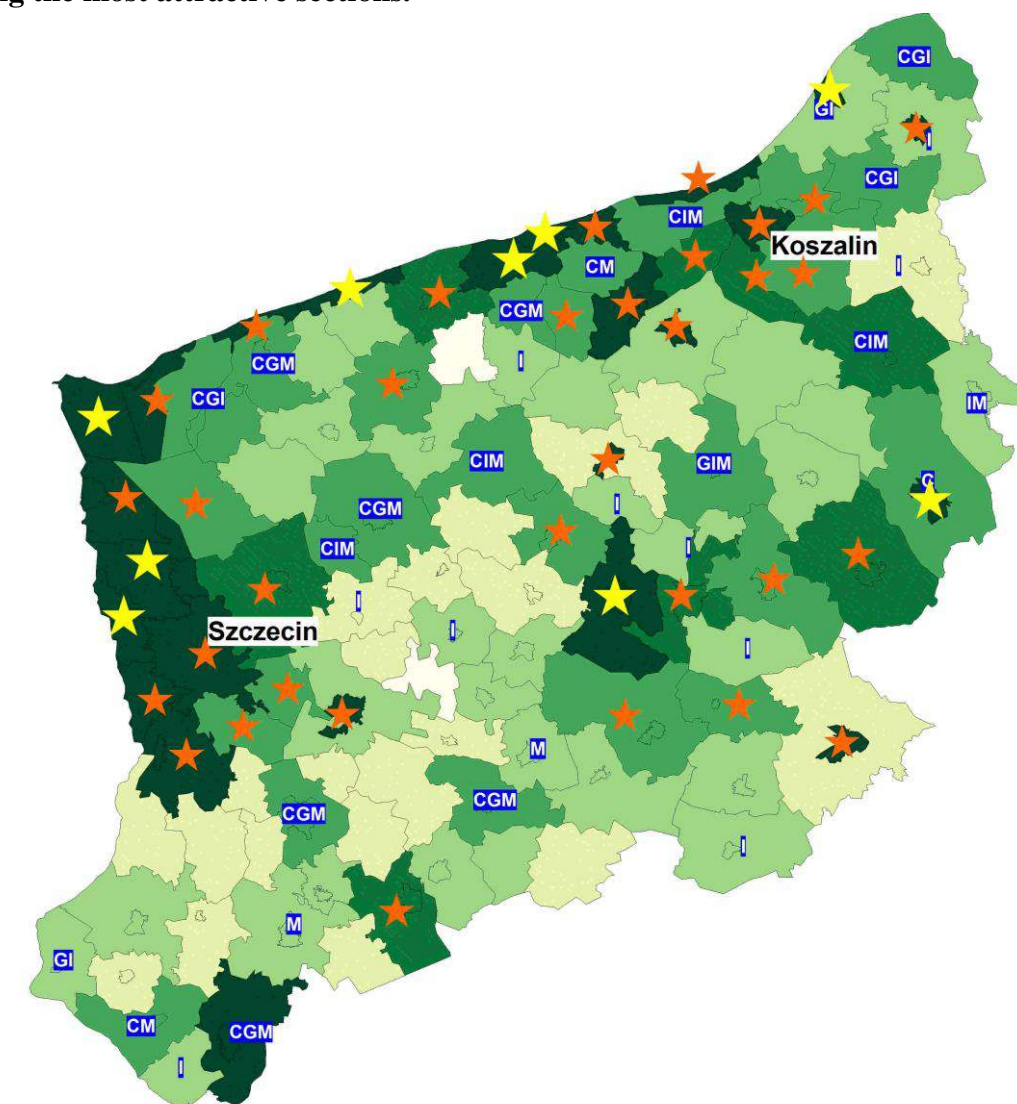
- C** Industry
- G** Trade and repairs
- I** Accommodation and catering
- M** Professional, scientific, technical activities

Golden star counties:

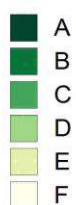
Szczecin, Świnoujście, Police

Source: Author's own work.

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



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



★ The highest rank for
all the sections according PKD
(Polish Classification of Economic Activity):
C, G, I and M

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

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

C Industry
G Trade and repairs
I Accommodation and catering
M Professional, scientific,
technical activities

Golden star communes:

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

Source: Author's own work.

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

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

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

Among rural communes the highest rank communes include:

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

Among urban-rural communes the highest rank communes include:

- **golden star communes:** Drawsko Pomorskie (u-r), Police (u-r),
- **golden star communes:** Barlinek (u-r), Biały Bór (u-r), Borne Sulinowo (u-r), Czaplinek (u-r), Dziwnów (u-r), Goleniów (u-r), Gościno (u-r), Gryfino (u-r), Kalisz Pomorski (u-r), Karlino (u-r), Łobez (u-r), Międzyzdroje (u-r), Mirosławiec (u-r), Nowe Warpno (u-r), Sianów (u-r), Trzebiatów (u-r), Złocieniec (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 Western Pomeranian voivodship such centre is:

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



Western Pomeranian Investor Services Centre is a partner of the Polish Information and Foreign Investment Agency and a one stop shop: a source of regional information that are useful for investors, legal acts, investment offers and current data on region's economy. The personnel of the centre have qualifications to offer services for investors and are working according to the standards set by the Polish Information and Foreign Direct Investment Agency, which offers it substantive help and trainings.

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

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

These institutions are among others:

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

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

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

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

Scandinavian - Polish Chamber of Commerce is an association created by business people and entrepreneurs associated with Scandinavia. SPCC headquarters is located in Warsaw, but the organization is active throughout the country through representatives in Krakow, Poznan, Tri-City, Szczecin and Wroclaw. Chambers offer includes: network of contacts, exchange of experience and knowledge, supporting Scandinavian-Polish interests. The Chamber helps companies associated to the SPCC, among others, by: providing opportunities for networking and business meetings and conferences, promotion of member companies at events organized by the Chamber and on the website, information services, promoting Scandinavian culture. Through its network of contacts SPCC may also provide services for Polish companies seeking to gain information about the Scandinavian markets or companies interested in finding business partners - manufacturers, distributors, direct customers - in the Nordic countries.

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

Koszalin Chamber of Commerce and Industry is an organization bringing together entrepreneurs from Central Pomerania. The main task of the Chamber is to represent the interests of the business entities to state authorities, local government and other institutions and organizations. The offer of the Chamber includes: information services, training, consultancy, assistance in finding foreign trade partner, translation services, organization of trade missions, trade fairs group trips abroad, courses, seminars, legalization of documents, issuing certificates of origin. Furthermore, the Board provides assistance for mating partners (the possibility of placing bids Polish companies in information systems), and also represent an offer of economic cooperation (offer foreign companies offering and looking for services and goods in Poland).

Technopark Pomerania (Szczeciński Park Naukowo - Technologiczny Sp. z o.o.)
(<http://www.technopark-pomerania.pl/>)

The objective of Technopark Pomerania has been to support the development of innovation in Szczecin. Technopark offer includes : rental offices, conference rooms and training, consulting and training services, virtual office service, the server (secure storage and processing of data). Technopark realizes expansion program constitutes a set of tools to support the development of modern companies in the ICT industry, involving all more experienced tenants of the Technopark and a wide network of contacts, advisory services supporting the management of the company, information on obtaining external funding, support marketing and PR industry events and training.

In addition to supporting the Programme Expansion, ICT companies in Technopark can enjoy the preferential prices for the rental of offices, equipment, conference and training rooms, and data center services. Incubation program is a package of consulting services connected with the lease of which is targeted for new business projects (start-ups), which will have its headquarters in Technopark Pomerania. In addition, Technopark offers co-working space, to help entrepreneurs establish contacts and to share knowledge and experiences.

Industrial Park of Goleniów (www.goleniow.pl)

Industrial Park of Goleniów has road network designed for heavy transport. The Park is a part of Special Economic Zone which is a subzone Kostrzyń - Słubice SEZ. Park is managed by the mayor of the commune, and the work associated with its development, investment and operation is carried out by employees of community. Municipal office offers to investors interested in the activities of the Park organization and technical assistance, as well as quick access to needed information.

Industrial Park in Stargard (www.sarl.pl)

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

High Technologies Industrial Park in Stargard Szczeciński (<http://www.stargard.pl/Mapa-terenow-inwestycyjnych>)

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

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

Park offer includes a fully developed investment areas (part of the area is covered by Kostrzyn Special Economic Zone); rental or sale of new production standard and built according to the individual needs of investors (new production facility can be rented with the possibility of a later purchase). In the "Invest-Park" also functions Technology Incubator. Incubator offers rental of industrial space, office space and production. In addition, businesses in the metal industry incubator offers services within the Centre powder coating.. Investing activities in the areas of "Invest-Park" investor receives support from the Office of Investor on m.in: contacts with the public administration, training and recruitment (HR Bank).

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

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

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

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

On the Centre's website is search engine services offered by RCIiTT for entrepreneurs, researchers and students, graduate students and alumni.

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

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

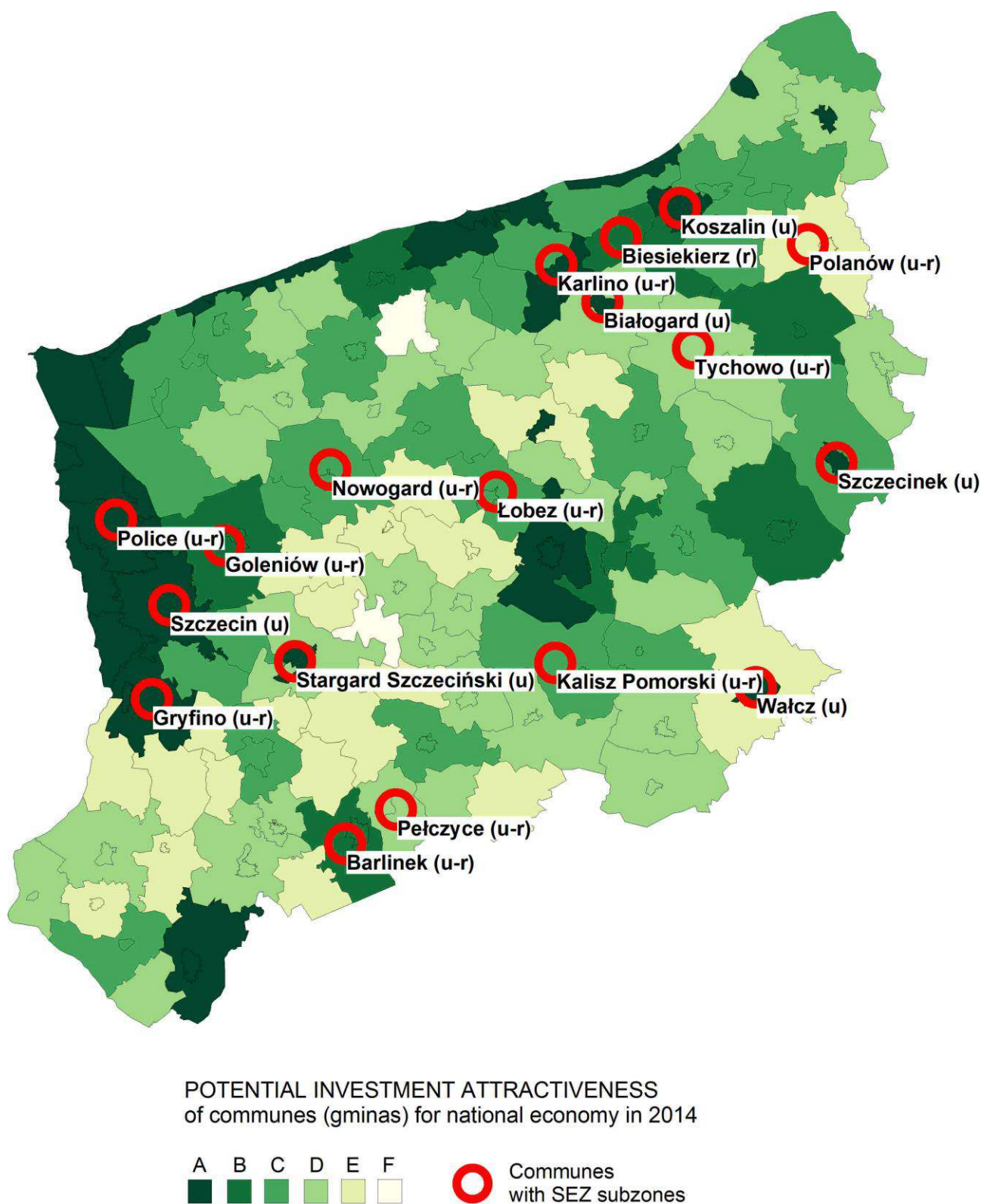
4.2. SPECIAL ECONOMIC ZONES IN THE WESTERN POMERANIAN VOIVODSHIP – EFFECTS

There are four Special Economic Zones in the Western Pomeranian voivodship: Pomeranian, Słupsk, Kostrzyn-Słubice i Mielec. At the end of 2014 the areas of the SEZ were parts of 6 cities and 13 communes (in Karlino function 2 zones Kostrzyn-Słubice and Słupsk, in Szczecin function 2 zones - Mielec and Kostrzyn-Słubice) – see Chart 3.

The first SEZ was created in 2002. Till the end of 2014 the enterprises operating SEZs have invested PLN 3.7 bln in this area which is 4% of all investment outlays in the Polish SEZs. In the same time the enterprises created 6.1 thousand new jobs in the region, which was 2% of all new jobs created in the Polish economic zones - see Table 3 in the Appendix.

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

Chart 3. The location of SEZs in Western Pomeranian voivodship



Source: Author's own work.

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

- that are able to develop the existing shipyard areas along with human potential existing in the Szczecin agglomeration of the metal and electrical industry - for Kostrzyn SEZ
- the metal industry, engineering and electrical engineering, investment areas that may develop human resources capacity and a large agglomeration of Szczecin - for Mielec SEZ,
- the metal industry, machinery and electronics - in the case of the Pomeranian SEZ,
- representing branches: metal, machine, electricians and warehouse logistics services - for Slupsk SEZ.

APPENDIX

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

Voivodship	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 activities
Voivodship						
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
LÓDŹ	0,566	C	B	E	E	D
LESEZR 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
SILESIA	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 COUNTIES S OF WESTERN POMERANIAN VOIVODSHIP FOR THE NATIONAL ECONOMY AND SELECTED SECTIONS

County	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
	National economy	National economy	Industry	Trade and repairs	Accommodation and catering	Professional, scientific and technical activities
Counties						
Police	0,314	A	A	A	A	A
City of Świnoujście	0,291	A	A	A	A	A
City of Szczecin	0,291	A	A	A	A	A
City of Koszalin	0,289	A	A	A	B	A
Kołobrzeg	0,260	B	B	A	A	B
Szczecinek	0,231	C	C	C	C	C
Kamień Pomorski	0,230	C	C	C	A	D
Sławno	0,229	C	C	C	A	D
Koszalin	0,227	C	D	C	A	D
Drawsko Pomorskie	0,225	C	D	C	C	D

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 WESTERN POMERANIAN VOIVODSHIP FOR THE NATIONAL ECONOMY AND SELECTED SECTIONS

Commune	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
	National economy	National economy	Industry	Trade and repairs	Accommodation and catering	Professional, scientific and technical activities
Urban communes						
Kołobrzeg (u)	0,249	A	A	A	A	A
Darłowo (u)	0,245	A	A	A	A	A
Szczecinek (u)	0,240	A	A	A	A	A
Szczecin (u)	0,240	A	A	A	B	A
Stargard Szczeciński (u)	0,235	A	A	A	C	A
Koszalin (u)	0,235	A	A	A	B	A
Świdwin (u)	0,232	A	A	A	B	A
Świnoujście (u)	0,230	A	A	A	A	A
Sławno (u)	0,221	A	A	A	C	A
Białogard (u)	0,221	A	A	A	C	A
Wałcz (u)	0,217	A	A	A	C	A
Rural communes						
Rewal (r)	0,260	A	A	A	A	A
Kołobrzeg (r)	0,240	A	A	A	A	A
Dobra (Szczecińska) (r)	0,238	A	A	A	A	A
Mielno (r)	0,223	A	A	A	A	B
Ustronie Morskie (r)	0,217	A	A	A	A	B
Kołbaskowo (r)	0,211	A	A	B	A	A
Biesiekierz (r)	0,204	B	B	B	A	B
Świeszyno (r)	0,191	B	B	C	A	B
Kobylanka (r)	0,187	C	C	C	B	B
Stepnica (r)	0,185	C	C	B	C	C
Dygowo (r)	0,182	C	C	D	D	C
Postomino (r)	0,178	C	C	C	A	D
Stare Czarnowo (r)	0,177	C	C	C	C	C
Manowo (r)	0,175	C	C	C	B	C
Szczecinek (r)	0,173	C	C	D	D	D
Osina (r)	0,172	C	C	D	B	C
Będzino (r)	0,170	C	C	D	B	C
Siemyśl (r)	0,170	C	C	C	D	C
Malechowo (r)	0,170	C	C	C	B	D

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Urban-rural communes						
Police (u-r)	0,258	A	A	A	A	A
Dębno (u-r)	0,221	A	A	B	D	A
Dziwnów (u-r)	0,221	A	A	B	A	B
Karlıno (u-r)	0,215	A	A	A	A	B
Międzyzdroje (u-r)	0,212	A	A	A	A	B
Drawsko Pomorskie (u-r)	0,210	A	A	A	A	A
Gryfino (u-r)	0,207	A	B	B	C	A
Nowe Warpno (u-r)	0,207	A	A	A	A	B
Goleniów (u-r)	0,203	B	B	B	B	A
Złocieniec (u-r)	0,200	B	B	B	B	B
Trzebiatów (u-r)	0,197	B	B	C	A	B
Barlinek (u-r)	0,193	B	B	B	C	B
Bobolice (u-r)	0,190	B	C	D	C	B
Borne Sulinowo (u-r)	0,190	B	B	B	B	C
Sianów (u-r)	0,187	C	C	B	B	C
Kalisz Pomorski (u-r)	0,186	C	C	B	A	C
Kamień Pomorski (u-r)	0,185	C	C	C	D	C
Choszczno (u-r)	0,184	C	C	C	D	B
Pyrzyce (u-r)	0,184	C	C	C	E	B
Gryfice (u-r)	0,184	C	C	C	C	B
Czaplinek (u-r)	0,181	C	C	C	C	C
Nowogard (u-r)	0,180	C	C	C	D	B
Mirosławiec (u-r)	0,179	C	C	C	C	C
Gościno (u-r)	0,178	C	C	C	C	C
Łobez (u-r)	0,173	C	C	C	B	C
Wolin (u-r)	0,172	C	C	C	B	D
Resko (u-r)	0,172	C	C	D	C	C
Mieszkowice (u-r)	0,172	C	C	D	D	C
Połczyn-Zdrój (u-r)	0,171	C	D	C	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)
Słupsk	Białogard, Karlino	435 728 734,02	571	wood and products of wood and cork, except furniture; articles of straw and materials of a kind used for plaiting
Słupsk	Białogard, Tychowo	-	-	no leading industry
Kostrzyn-Słubice	Białogard city of Białogard	-	-	no leading industry
Kostrzyn-Słubice	Choszczno, Pelczyce	-	-	no leading industry
Słupsk	Drawsko Pomorskie, Kalisz Pomorski	-	-	no leading industry
Kostrzyn-Słubice	Goleniów, Goleniów	180 759 004,20	985	chemicals and chemical products
Kostrzyn-Słubice	Goleniów, Nowogard	-	-	no leading industry
Kostrzyn-Słubice	Gryfino, Gryfino	-	-	no leading industry
Kostrzyn-Słubice	Kamień Pomorski, Kamień Pomorski	-	-	no leading industry
Słupsk	Koszlin, Biesiekierz	-	-	no leading industry
Słupsk	Koszalin, Polanów	-	-	no leading industry
Kostrzyn-Słubice	Łobez, Łobez	-	-	no leading industry
Słupsk	City of Koszalin, city of Koszalin	242 377 018,52	1 264	products of other non-metallic mineral products, warehousing and transportation support services
Mielec	City of Szczecin, city	196 568 292,46	263	fabricated metal products, except

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	of Szczecin			machinery and equipment
Kostrzyn-Słubice	Myślibórz, Barlinek	426 665 776,08	1 195	wood and products of wood and cork, except furniture; articles of straw and materials of a kind used for plaiting
Kostrzyn-Słubice	Myślibórz, Dębno	-	-	no leading industry
Pomeranian	Stargard Szczeciński, city of Stargard Szczeciński	1 656 006 986,09	1 208	rubber and plastic products
Słupsk	Szczecinek, city of Szczecinek	393 992 567,20	103	wood and products of wood and cork, except furniture; articles of straw and materials of a kind used for plaiting

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

Table 5. UNIVERSITIES, FACULTIES AND ITS CATEGORIES

School name	Category of Ministry of Science and Higher Education
Maritime University of Szczecin	B - Faculty of Navigation
	B - Faculty of Engineering and Economics of Transport
	B – Faculty of Mechanical Engineering
Academy of Art in Szczecin	B- Faculty of Music Education
	B - Instrumental Faculty
	B – Faculty of Painting and New Media
	B – Faculty of Visual Arts
Koszalin School of Humanities in Koszalin	no data
State Higher Vocational School in Koszalin	no data
State Higher Vocational School in Wałcz	no data
Koszalin University of Technology	A - Institute of Technology and Education
	B – Faculty of Civil Engineering, Environmental Engineering and Geodesy
	B – Faculty Electronics and Computer Science
	B - Faculty of Mechanical Engineering
	B - Faculty of Economics
	B - Institute of Social Policy and International Relations
	C - Design Institute
	C - The Institute of Modern Languages and Communication
Pomeranian Medical University	A - Faculty of Medicine and - Biotech and Laboratory Medicine
	A - Faculty of Medicine with the Division of Education in English
	B - Faculty of Health Sciences
	B - Faculty of Dentistry
Stargardzka School - Stargardinum in Stargard	no data

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Szczecin School Collegium Balticum in Szczecin	no data
University of Szczecin	A - Faculty of Economics and Management
	B – Faculty of Biology
	B - Faculty of Physical Education and Health Promotion
	B - Faculty of Philology
	B - Faculty of Humanities
	B - Faculty of Earth Sciences
	B - Faculty of Mathematics and Physics
	B - Faculty of Law and Administration
	B - Faculty of Theology
B - Faculty of Economics and Management Services	
Higher School of Public Administration in Szczecin	no data
TWP Higher School of Humanities in Szczecin	no data
School of European Integration in Szczecin	no data
College of Foreign Languages in Szczecin	no data
The Institute of Cosmetology and Health Promotion in Szczecin	no data
Higher College of Technology and Economics in Szczecin	no data
Higher Vocational School "Oeconomicus" Polish Economic Society, in Szczecin	no data
West Pomeranian Business School in Szczecin	no data
West Pomeranian University of Technology in Szczecin	A - Faculty of Civil Engineering and Architecture
	And - Faculty of Chemical Technology and Engineering
	A - Faculty of Mechanical Engineering and Mechatronics
	B - Faculty of Food Sciences and Fisheries
	B - Faculty of Electrical Engineering
B - Faculty of Informatics	

	B - Faculty of Biotechnology and Animal Breeding
	B - Faculty of Maritime and Transport
	B - Faculty of Economics
	B – Faculty of Environment and Agriculture

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.

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