



CASE - Centrum Analiz Społeczno-Ekonomicznych
CASE - Center for Social and Economic Research



The role of FDI in regional development – the case of Pomorskie Voivodeship

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Agenda

1. Pomorskie: facts and figures
2. Special Economic Zones
3. Science and Technology Parks
4. Business Environment Institutions
5. Conclusions



Key facts

- Area: 18,310 sq km
- Population: 2,302,077 (ca. 6%)
- Working-age population: 1,462,174
- Age structure in 2014 was as follows: pre-working age accounted for 19.5% of persons working age: 62.8% and post-working age: 17.7% (Poland analogously: 18%, 63% and 19%).
- Natural resources: amber, clay and chinks, gravel, marl, natural aggregate, peat, rock salt, sandstone, shale gas deposits
- Number of students of higher education: 104,024+
- Number of institutions of higher education: 28
- Major airport: Gdańska Lech Wałęsa Airport





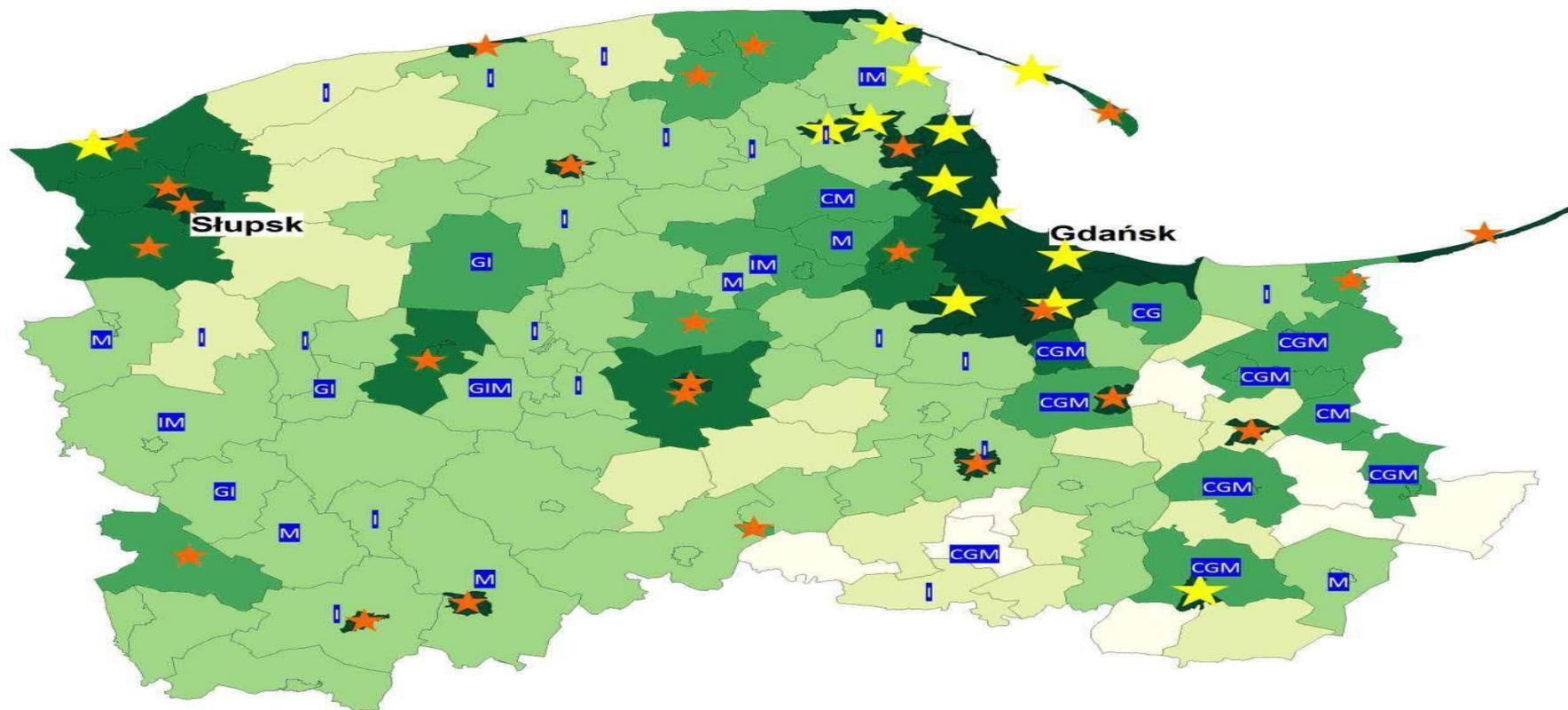
Energy sector

- the sea and coastal belt belong to the most favourable, first windiness zone in Poland, with wind attaining an average above 4 m/s. The windiness of our region guarantees the profitability of investments in wind farms, which is, according to TPH Horwath calculations, 12%;
- ca. 40 installations so far;
- the offshore wind power industry has extraordinary economic potential in the region. By 2030, there is a possibility of installing sea wind farms in an area of 2000 km² at least, with a total capacity of approx. 5000 MW;
- in a ranking conducted by the government, the Pomeranian region (Żarnowiec) was indicated as the best location for a new nuclear plant. The final decision about the location will be taken in the upcoming years. The execution of the first part of the investment is planned for 2020;
- Pomerania has enormous potential in biomass production due to the fact that arable land constitutes 42.6% of the area, and 37% is forested;
- shale gas deposits: 2/3 of the whole area?

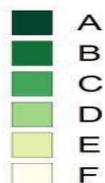


Region's strenghts: tourist spot

- Pomerania is the world leader of amber production - in 2006, the Museum of Amber has been opened (1st in the world);
- rich natural assets for tourism development;
- the Sopot Pier is a point of architectural interest and a European phenomenon, as Europe's longest wooden structure of the kind;
- Pomorskie is a land of many lakes and river routes;
- biggest and well-known movie and music festivals in the country



POTENCJALNA ATRAKCYJNOŚĆ INWESTYCYJNA GMIN dla gospodarki narodowej w 2014



Najwyższa ocena dla wszystkich sekcji wg PKD C, G, I, M



Oceny ponadprzeciętne dla wszystkich sekcji wg PKD C, G, I, M

C – processing industry

G – trade and repairs

I – tourism and catering business

M –

professional, scientific and technical assistance

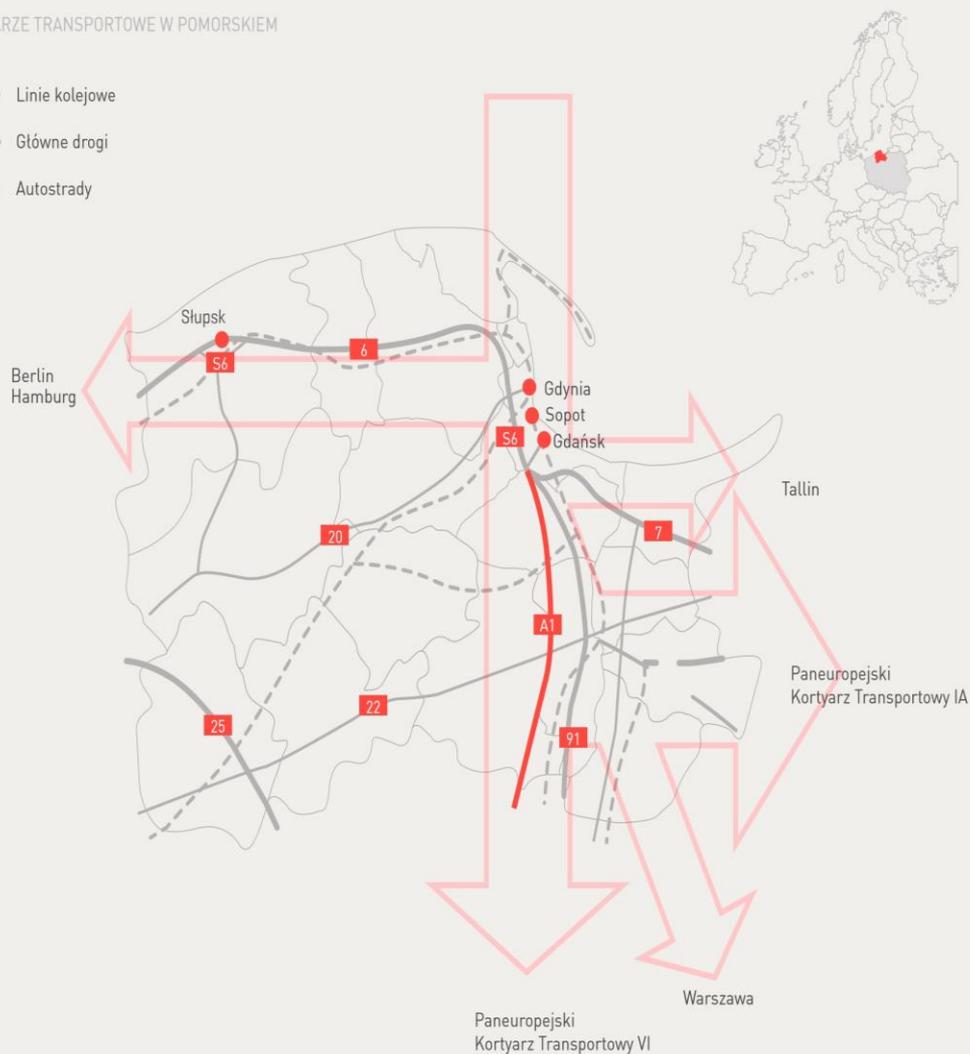


Region's strengths: accessibility

- Accessible by road, rail, air and sea
- Connections between Eastern, Southern and Western Europe (located at the crossroads of pan-European transport corridors that connect Scandinavia with the Mediterranean region and with the west of the continent)
- While preparing for the EURO 2012, Gdańsk acquired a new airport terminal at the Lech Wałęsa Airport

KORYTARZE TRANSPORTOWE W POMORSKIEM

- Linie kolejowe
- Główne drogi
- Autostrady





Region's strenghts: accessibility





Region's strenghts: accessibility

Niewątpliwą zaletą regionu jest, w porównaniu do innych lotnisk w Polsce, największa liczba połączeń lotniczych z krajami skandynawskimi.

	Gdańsk	Wrocław	Kraków	Łódź	Katowice	Poznań
Aarhus	✓					
Bergen	✓					
Kopenhaga	✓	✓	✓		✓	✓
Goteborg	✓					
Helsinki	✓		✓			
Malme Sturup	✓	✓			✓	
Oslo	✓		✓			
Oslo - Rygge	✓	✓	✓	✓		✓
Oslo - Torp	✓	✓			✓	✓
Stavanger	✓		✓		✓	
Sztokholm-Skavsta	✓		✓		✓	✓
Turku	✓					

* dane za IV 2012



Region's strenghts: accessibility

KOLEJ

Połączenia kolejowe w województwie pomorskim to bardzo dogodny sposób transportu towarów, m.in. tych, które docierają drogą morską do portów w Gdańsku oraz Gdyni, a następnie są przewożone w głąb kontynentu. Przez województwo, oprócz połączeń lokalnych, biegną ważne dla ruchu międzynarodowego linie kolejowe.

z Gdańska przez Bydgoszcz, Łódź, Katowice i dalej do Bratystawy lub Pragi i Wiednia

z Gdańska przez Warszawę, Kraków i dalej do Pragi lub Bratystawy

z Gdańska przez Tczew, Braniewo i dalej do Kaliningradu

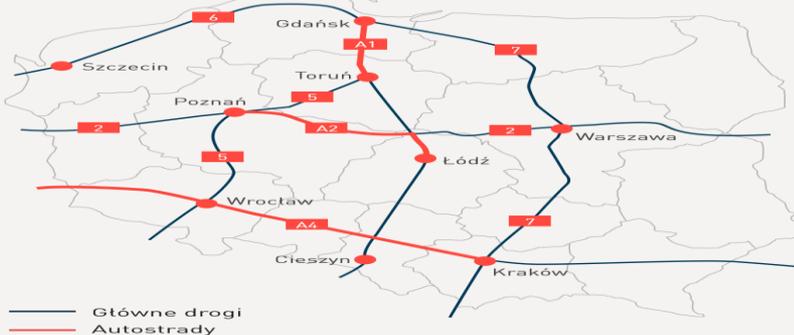
z Gdańska przez Szczecin do Berlina

Od 2014 połączenia między Gdynią a Warszawą i dalej Krakowem będą obsługiwane przez nowoczesne składy Pendolino osiągające na tej trasie średnią prędkość 200 km/h.

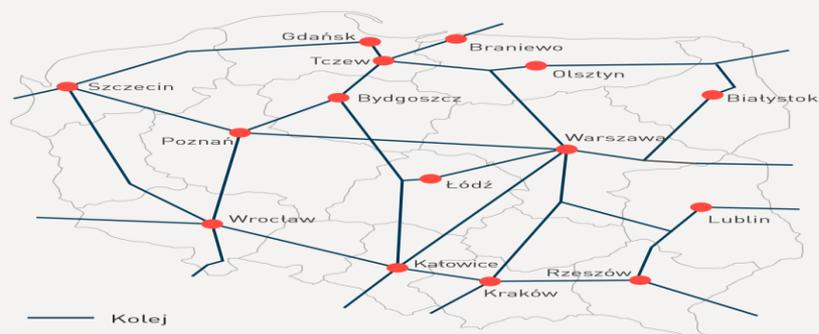
W najbliższych latach zostaną zrealizowane inwestycje, które dodatkowo usprawnią komunikację wewnątrz regionu: Pomorska Kolej Metropolitalna, korytarz helski, czy korytarz kościerski.

DROGI

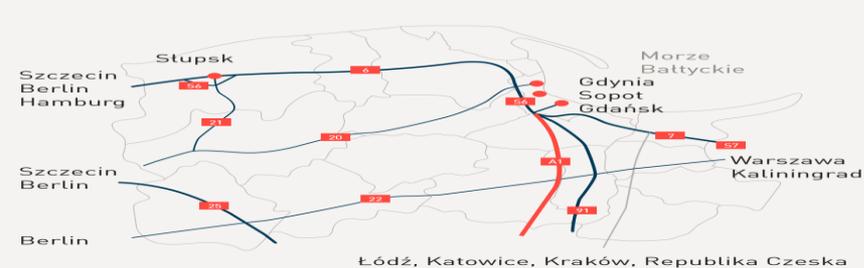
POŁĄCZENIA DROGOWE W POLSCE



POŁĄCZENIA KOLEJOWE W POLSCE



POŁĄCZENIA DROGOWE WOJEWÓDZTWA POMORSKIEGO



Drogą o największym znaczeniu strategicznym jest Autostrada A1. Będzie ona częścią międzynarodowej drogi łączącej Skandynawię z południem kontynentu. Istotne znaczenie mają drogi krajowe nr 7 (Gdańsk – Warszawa – Kraków) oraz 6 (Gdynia – Szczecin). W najbliższych latach trasy te zostaną rozbudowane oraz podniesione do standardu dróg szybkiego ruchu.



Region's strengths: accessibility

- The ports of Gdansk and Gdynia handle all types of cargo. It is worth mentioning, that in total, Pomeranian ports emerge as regional leaders in containers handling. In the last year, Pomerania was ranked second (after St. Petersburg) among the ports of Baltic Sea;
- Thanks to the DCT and weekly connections with Asia introduced by Maersk Line (AE10 line), operated by the largest transport vessels in the world, Gdansk has become the key seaport on the Baltic Sea. Merchandise lands directly in Poland, from where it is distributed by land transport or smaller vessels to other countries. Thus, the Pomeranian region has become a posting hub of Central and Eastern Europe for merchandise shipped by sea from Asia



Region's strengths: Education

- Pomorskie has a well-developed research and teaching base in the form of universities and research institutions. A distinguishing feature of the education system in the region are universities providing education in the fields of maritime high evaluation (category I) by the Ministry of Science and Higher Education (Institute of Hydraulic Engineering, Maritime Institute);
- Regional universities offer many unique specialisations when compared to the rest of Poland. Among them is the largest centre of Scandinavian studies at the University of Gdansk. The centre offers Swedish, Danish, Norway and Finnish programs;
- The cooperation of Pomeranian universities with investors present in the region is conducive to the dynamic development of the SCC & BPO sector in Tri-City. Schools are involved in the organisation of specialised training schemes for individual companies



Pomeranian Special Economic Zone



Pomeranian Special Economic Zone (PSEZ) established on the basis of Cabinet resolution of 11 July 2001 will operate until 31 December 2026. This is a part of the territory of the country within which economic activity may be conducted under the favourable/preferential conditions.

The Zone is managed by a company operating under the business name Pomeranian Special Economic Zone Ltd. with registered office in Sopot.

The PSEZ is situated at 29 locations (subzones) in four regions of Poland. It's overall area reaches 2039.9903 ha and about 688.87 ha there is still available for investors.



Pomeranian Special Economic Zone





Pomeranian Special Economic Zone

- Convenient location for investments: prepared industrial areas in the northern part of Poland near main communication routes and in the vicinity of international airports and seaports;
- A permit to conduct business in the PSEZ authorizing an entrepreneur to take advantage of public aid in the form of tax exemptions by virtue of the costs of new investment of creation of new jobs;
- End-to-end service of each investment project provided by a professional team led by an advisor dedicated to each investor:
- ✓ support during the procedure of application for the zone permit providing the necessary information,
- ✓ help in contacts with competent agencies, tendering and negotiation procedures,
- ✓ issuing of permits in the name of the Minister of the Economy,
- ✓ support in the form of the post-investment care:
 - help in the solving of investors' problems,
 - support in the promotion of investors,
 - training regarding, e.g.: funding the operations, tax settlements,executing the control over operations in line with the terms specified in the permit,
- ✓ integration with various environments: governmental and local administration, business environment institutions, universities, scientific centres and other entrepreneurs by way of networking meetings, conferences, etc.



Słupsk Special Economic Zone



Słupsk Special Economic Zone is located in the north of Poland, close to the Baltic Sea. The Słupsk Special Economic Zone occupies a total area of 899 ha and consists of 17 investment areas which are situated within towns and communes in the Central Pomerania Region. Słupsk Special Economic Zone operates until 31st of December 2026.

The Słupsk Special Economic Zone also offers brownfields in the Słupsk Technology Incubator, which is located within the Zone. Except office spaces, warehousing and production spaces the Automation, Robotics and Vision Systems Lab is operating. Another lab for renewable energy sources is in the stage of equipping. STI is also a modern Conference & Training Centre.



Słupsk Special Economic Zone

The Administrator of the Słupsk Special Economic Zone established a **cooperation with municipalities** on the range of including investment areas under the patronage of the Słupsk Special Economic Zone.

Investor	Country	Main activity
"KRONOSPAN POLSKA" Sp. z o.o.	Cyprus	Production of raw and melamine faced mdf and chipboards, lacquered hdf, wall panels
"AJ Fabryka Mebli" Sp. z o.o.	Sweden	Wood processing
Faser Plast Poland Sp. z o.o.	Switzerland	Plastic processing



Gdańsk Science and Technology Park

Gdańsk Science and Technology Park (GSTP) is part of the investment offer of the Pomeranian Special Economic Zone Sp. z o. o. The Park is mainly concerned with areas of biotechnology, IT and energetics. It contributes to the exchange of experience, promotion of new technological solutions and creation of new businesses based on interesting, creative ideas. There are over 100 companies in the Park, all based on innovative ideas. They support the development of the Pomeranian Voivodeship by making it competitive and become the first ones to contribute to the R&D activities of the Polish economy.

Sector profile: Biotechnology, Biomedicine, ICT, Energy

Gdansk Science and Technology Park (GSTP) is a place that facilitates and promotes access to knowledge and most modern research. It merges science, innovative economy and broadly defined enterprise. The GSTP comprises laboratories, office and laboratory spaces, the Data Centre server room, Conference and Training Centre, EduPark, EduLab and EduKindergarten with EduNursery.



Pomeranian Science and Technology Park, Gdynia

Pomeranian Science and Technology Park in Gdynia (PPNT Gdynia) - established in 2001 by the City of Gdynia and, after its expansion in 2013, it has become the biggest park of this kind in Poland. It offers attractive space for companies' premises, laboratories, fully equipped conference centre with exhibition and meeting rooms, prototyping rooms, recreation area, trainings and counselling, as well as PR and promotional backup and networking. PPNT stands for innovation and entrepreneurship. It is the best place for searching new solutions in technology and fostering innovative companies.

PPNT is home to:

- Gdynia Startup Zone;
- Biotechnological Laboratory;
- Regional Patent Information Centre;
- Gdynia Design Centre;
- EXPERYMENT Science Centre;
- Conference Centre;
- Social Innovations Laboratory



Slupsk Technology Incubator

Slupsk Technology Incubator officially started its operation in October 2012. Currently STI is in the preliminary stage of development. It is dedicated to entrepreneurs who are in the start-up stage, as well as for existing companies in the stage of further development and planning to implement innovation.

- ✓ lease of office spaces on preferential terms;
- ✓ access to use meeting rooms, discounts at the Conference and Training Center;
- ✓ administrative and office support;
- ✓ training and advisory support;
- ✓ promotion of tenants and their offer, free advertising on the website and periodic publications;
- ✓ virtual office services;
- ✓ door-to-door cooperation and establishing business contacts

STI is located within the Slupsk Special Economic Zone. There is a possibility to get the permit on running the activity in the Zone and take advantage of the public aid such as tax exemptions after fulfilling specific conditions.



Kwidzyn Industrial-Technological Park

Main sector: (RES) industry and services operating within/using the technology of the renewable energy resources ; eco energy; energy management; ICT:

- Entrepreneurship Incubator - modern office, production and service space for newly established and for already active micro-companies and SME;
- functional offices for business service centers – companies providing legal services, accounting-financial services, marketing and advertising, banks, equity and loan funds, financial counseling offering assistance in applying for external financing (including EU funds), as well as advising in transfer of technologies and commercialization of knowledge (including protection of intellectual property);
- institutions & organizations pursuing the KPPT mission: Powislanski Regional Energy Management Agency, Nadwislanski Renewable Energy Cluster, etc.; advanced ICT support;
- state-of-the-art conference and training centre with innovation and exhibition part devoted to renewable energy;
- „A demonstration passive house”, promoting energy-saving housing, is used to implement achievements of the research and science in the field of energy efficiency



Green Industrial Park Cierznie

Investment incentives:

- plot price: within 11-16 PLN net/2 (the price may be changed, it is calculated based on the valuation survey performed by a Certified Property Valuer, by way of a tender. The land price may also be influenced by the employment rate the investor plans to obtain.);
- possibility to be exempted from real property tax - pursuant to the resolution no. of the Municipal Council;
- location of the areas by the national road no. 22;
- professional service for the investor;
- possibility to enable the investor to have access to offices, as well as storage and production areas in IPC to the investor for the period of the investment in ZPP;
- support in employee recruitment;
- possibility to train the employees for the needs of the investor;
- possibility to transport the employees to work in ZPP;
- free promotion of entities operating in ZPP on local websites and during the organized trainings and conferences



Business Environment Institutions

1. National

- **The Polish Information and Foreign Investment Agency (PAIIZ)**, helps investors to enter the Polish market and find the best ways to utilise the possibilities available. It guides investors through all the essential administrative and legal procedures that involve a project; we also support firms that are already active in Poland. We provide rapid access to the complex information relating to legal and business matters regarding the investments, help in finding the appropriate partners and suppliers, together with new locations. PAIIZ's mission is also to create a positive image of Poland across the world, promoting Polish goods and services.



Business Environment Institutions

2. Regional

- **Pomerania Development Agency Co. (Agencja Rozwoju Pomorza SA)**, established in 1992 sets standards for supporting entrepreneurship in Pomerania, and is a major partner to the local authorities in fuelling regional development.
 - facilitates access to the EU funds for the Pomeranian entrepreneurs;
 - implements the EU Funds for businesses and institutions enhancing entrepreneurship, and carries through projects of essential significance for Pomerania;
 - management of the Capital Fund investing in innovative business ideas, running of the Investors' Care Service responsible for economic promotion of the region and direct foreign investments, or provision of information, consulting, and training services for the SME sector.

The Agency also runs European projects of local, national and international significance.



Business Environment Institutions

2. Regional

- **Gdańsk Economic Development Agency Ltd. (InvestGDA)** was established in 2008, and its owned in 100% by the City of Gdańsk. It is a development agency aiming for the international and Polish partners to quickly and safely invest money or technical idea in the region. It offers a comprehensive support to investors at every stage of their operations. They also prepare attractive areas for investment purposes.



Business Environment Institutions

2. Regional

- **Invest in Pomerania** provides free-of-charge services to foreign investors interested in carrying out projects in Pomerania. "Analysis of the investment attractiveness of Pomerania" by PwC was the ground for establishing the initiative in 2011. As a result, a unique foreign investors support system was developed. Its underlying principle is close cooperation between all the partners that form Invest in Pomerania (the Marshal's Office of Pomorskie Voivodeship, the cities of Gdańsk, Gdynia, Słupsk and Sopot, Pomeranian and Słupsk Special Economic Zones, InvestGDA and Pomerania Development Agency, which coordinates the actions of the initiative). Invest in Pomerania offers broad support during the investment process and comprehensive after-care services. The system is based on One-Stop-Shop rule. Investors that consult Invest in Pomerania are bound to receive support at each and every step of the investment process.



Business Environment Institutions

2. International

- **Pomeranian Regional Office in Brussels** – forms a regional partnership of Pomorskie voivodship municipalities, universities and other institutions for the comprehensive and effective development of the Pomeranian Province and creating its positive image, both in Poland and throughout Europe. The appointment of these institutions is a response to the increasing importance of regional policies in the EU and the need for direct networking on the European stage.
- **Pomorskie Office in Beijing** - established in 2009 under an agreement concluded between the company Dragon Era Trade Corporation and the Pomorskie Development Agency. The aim of cooperation is to support Pomorskie entrepreneurs to develop in China, as well as Chinese investors to invest in Pomorskie. The office provides a range of services aimed at business, commercial and cultural exchange between companies and institutions in Pomorskie and China. Pomorskie Office also provides professional services, i.e. professional organization of trade negotiations, representation of companies in China, supervising production, quality control and transportation of goods from China to Europe.



Sectors with huge potential

- **BPO/SSC** (ThyssenKrupp, PwC, Bayer, Thomson Reuters, Nordea Bank, Masterlease)
- **Energy sector** (AES Wind Generation, Mitsui IJ-Power, Greentech Energy Systems, Taiga Mistral, National Oilwell Varco)
- **ICT** (Lufthansa Systems, Relacom, Intel Technology, IBM)
- **Logistics** (Goodman, Maersk Line, Schenker DB, Gefco Wincanton, Jeronimo Martins)
- **Light chemistry** (Blirt, Prochimia Surfaces, Synevo)
- **Automotive sector** (Scania Production, Delphi)



Conclusions

Pomorskie – the new Polish Silicon Valley

- *10% of all ICT companies in Poland based in Pomorskie*
- *20% of the PL-produced software comes from Pomorskie*



Thank you

Thank you!



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