

MEMORANDUM OF THE GDAŃSK METROPOLITAN AREA

„Memorandum of the Gdańsk Metropolitan Area”

Collected works under the patronage of:
The Marshal of Pomorskie Voivodeship
Jan Kozłowski

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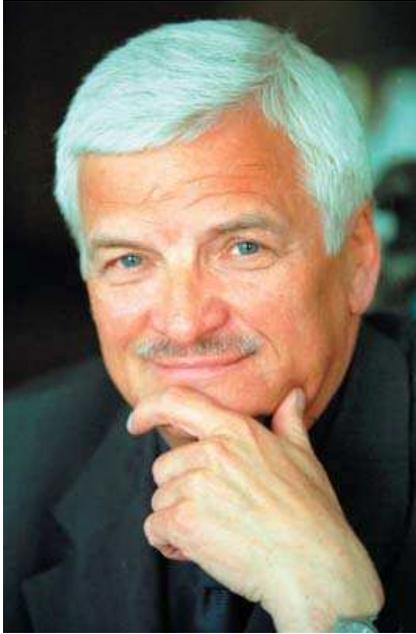
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Gdańsk 2006

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Ladies and Gentlemen,

The Baltic Sea Region is an area of intensive economic growth. It is also the part of the European Union where implementation of the principles of the Lisbon Strategy is at its most advanced and effective. Contributing to this achievement are individual countries of the Baltic Sea, as well as, entire regional structures along with their metropolitan urban centres - the true engines of growth.

The Gdańsk Metropolitan Area aims to capitalize on the advantages offered by its location through playing an active, developmental role and extending continuous efforts to increase regional appeal. This area is exceptional due not only to its rich history and great natural and cultural diversity. Its constantly improving economy, which include cutting-edge hi-tech sectors, as well as its young, well-educated society are guarantees of success for companies deciding to locate their activities here. We have seen many of such positive examples - both among foreign and Polish investors. We hope that their numbers will continue to grow and in order to facilitate the process even further, we have introduced a system of incentives, improved the quality of the natural environment, developed infrastructure, drawn young people towards key growth fields and participated in numerous international initiatives aimed at the unification of Europe and the Baltic Sea Region.

One of such supporting measures has taken on the form of the Baltic Metropolitan Economic Forum, providing framework for discussion on the role of metropolitan centres in the context of challenges posed by globalisation. It is also meant to provide opportunities to show-case the potential of the Gdańsk Metropolitan Area and provide a meeting platform for future investors.

It is my pleasure to take this opportunity to present you with the material designed to help discover more about the advantages offered by the Gdańsk Metropolitan Area.

A handwritten signature in black ink, appearing to read 'J. Kozłowski'.

The Marshal of Pomorskie Voivodeship
Jan Kozłowski

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- Town of Pruszcz Gdański
- Town of Reda
- Wejherowo Commune
- Kolbudy Commune
- Kosakowo Commune



Ladies and Gentlemen,

If you are considering the best possible place in the world for locating your business, select the Gdańsk Metropolitan Area - the European Centre of Solidarity. It is a great place for living, where every second person is a student, people are not afraid of hard work and the society, as well as authorities respect investors and appreciate their efforts, which bring fruit in the form of creation of new workplaces.



Lech Wałęsa

1. SEVEN REASONS THAT MAKE THE GDAŃSK METROPOLITAN AREA AN ATTRACTIVE BUSINESS LOCATION

1.1. Low Investment Risk

On May 1st 2004 Poland became a member of the European Union. Since then, investors have been operating here in accordance with European standards and the dynamic integration process has considerably reduced investment risk.

1.2. Low Business Operation Costs

Labour costs in Poland are five to six times lower than in Western Europe, with an average salary of €8,200 a year. Moreover, the growth in labour costs (3.7% in 2006) is lower than in France (3.9%) or Portugal (4.3%) and much lower than in the other countries that joined the EU in 2004 (for example, Hungary 5%, Slovakia 7.5%, Latvia 19%).

Labour costs in the Gdańsk Metropolitan Area¹ are close to the national average, however, compared to Warszawa, the costs are about a third lower. Office rental prices in the region vary from €7 to €14 per sqm per month, being much lower than in many Western European business hubs (e.g. Berlin €21, Frankfurt €33, Birmingham £27) and also lower than in Warszawa, Wrocław or Szczecin. Sale prices for office space in the centre of the Gdańsk Metropolitan Area vary from €800 to €1,200 per sqm, and from €380 to €770 per sqm outside the city centre. This is several percent lower than in Warszawa, Wrocław or Szczecin. Commercial rental prices in shopping centres in prime locations vary from €10 to €19 per month per sqm, being nearly twice as low as in Warszawa, Wrocław or Szczecin. Warehouse rental prices vary from €3 to €6 per sqm per month.

1.3. Highly Qualified Workforce

Poland has one of the youngest and best-educated societies in Europe, with a rich history and culture. Half of the population is below 35 and 45% of the 20-24 age group are students. Information technology studies are particularly popular, with over 150,000 students in this field. Most of the overall student population have good knowledge of English. According to OECD reports, Polish society is the second hardest-working in the world, right after the South Koreans, working an average of 600 hours per year more than the Germans and the French.

¹"The Gdańsk Metropolitan Area" – cities, communes and counties of Pomorskie Voivodeship grouped around the initiative aimed at cooperative developmental activities. The Gdańsk Metropolitan Area is inhabited by over 1 million people. The initiative is headed by the Gdańsk Metropolitan Area Council under the guidance of the Marshal of Pomorskie Voivodeship.

The Gdańsk Metropolitan Area offers benefits for service providers seeking qualified staff. In the academic year of 2005/2006, approximately 19,000 students, including a large number of IT, finance, management and marketing specialists as well as engineers, physicists and pharmacists graduated from universities in the region.

1.4. Modern Business Centre

Poland is becoming a centre for the European Business Process Offshoring. Companies such as Accenture, Avon, Electrolux, Fiat, IBM, Lufthansa and others have their BPO centres here. Poland is also a leader in attracting Research and Development investment, with over 30 corporations having their R&D centres in the country, including ABB, Intel, IBM, GlaxoSmithKline, Oracle, Siemens and Motorola.

The Gdańsk Metropolitan Area is the main business centre of Pomorskie Voivodeship, which has the highest export growth dynamics of all sixteen voivodeships in Poland. It is also characterized by the modern structure of its economy – over half of the local GDP comes from the services sector. The area has been experiencing dynamic development of big and medium companies from the hi-tech sector, with over one hundred of them already operating here.

1.5. Strategic Location

The Gdańsk Metropolitan Area is located at the intersection of the European transport routes. Lech Wałęsa Airport in Gdańsk will have served 1 million passengers by the end of 2006 with 16 direct connections between the region and other European cities. The seaports of Gdynia and Gdańsk have developed a modern and dynamically growing transport and logistics system. Record level investments were noted in container transport.

1.6. Investor friendly environment

Poland is highly rated by presidents of many European corporations for the availability of business locations, reasonable land costs and clear legal regulations (second in the 2005 Ernst&Young European ranking). Poland was also rated second in Europe in terms of investor credibility (AT Kearney, 2006). Businesses are eligible for various forms of public assistance, including tax exemptions (for more information see: www.paiiz.gov.pl).

The State provides particular support to businesses that increase employment and to exporters. Investors can rely on the support of local governments and numerous specialized institutions. Among the most important in the region are:

- *Chambers of commerce and employers' organizations* representing businesses in their external relations: the Pomeranian Craft Chamber for Small and Medium Size Enterprises, the Gdańsk Employers' Association, the Gdańsk Business Club and many others.
- *The Pomeranian Development Agency (Agencja Rozwoju Pomorza S.A.)* coordinating investors' activities in the voivodeship. It offers services to investors and trade missions through its *Investor Information Service Centre*.
- *Science and technology parks* creating favourable business development conditions for hi-tech enterprises.
- Loan and guarantee funds supporting SME development.
- Several branches of foreign banks, economic advisors and lawyers specialising in services for foreign investors.

1.7. High Quality of Life

Unique natural surroundings and cultural climate as well as efficient infrastructure of the region attract both tourists and investors. The following are also mentioned as strong advantages of the region:

- An environment friendly public transport network based on the SKM – a fast city railway system.
- Attractive residential offer – including developments in historical and modern city centres.
- Numerous cultural, entertainment and sports facilities (golf, tennis, sailing, windsurfing, as well as the best developed system of bicycle paths in Poland).

Pomorskie Voivodeship is one of the five most attractive investment regions in Poland. As much as 13% of all foreign investment and over 3,500 companies with foreign capital are located here.

Table 1.1. Foreign Investment in Selected Economic Sectors of the Region

INFORMATION TECHNOLOGY AND ELECTROTECHNICAL INDUSTRY	
PHILIPS CEI SP. Z O.O., KWIDZYN	PHILIPS, HOLLAND
FLEXTRONICS INTERNATIONAL POLAND SP. Z O.O., TCZEW	FLEXTRONICS, USA
JABIL CIRCUIT POLAND SP. Z O.O., KWIDZYN	JABIL CIRCUIT, USA
INTEL TECHNOLOGY POLAND SP. Z O.O., GDAŃSK	INTEL, USA
LUFTHANSA SYSTEMS POLAND SP. Z O.O., GDAŃSK	LUFTHANSA, GERMANY
GEMPLUS POLOGNE SP. Z O.O., TCZEW	GEMPLUS, FRANCE
MOELLER ELECTRIC SP. Z O.O., GDAŃSK	MOELLER, GERMANY
HUBNER + SUHNER SP. Z O.O., TCZEW	HUBNER + SUHNER, SWITZERLAND
MOLEX PREMISE NETWORKS SP. Z O.O., ROKITKI	MOLEX PREMISE NETWORKS, USA
ALL TECH SP. Z O.O., KARTOSZYNO	ALL TECH, USA
COMPUWARE SP. Z O. O., GDAŃSK	COMPUWARE, USA
MARITIME ECONOMY AND LOGISTICS	
BALTIC CONTAINER TERMINAL SP. Z O.O., GDYNIA	ICTS, PHILIPPINES
GDYNIA CONTAINER TERMINAL SP. Z O.O.	HUTCHISON PORT HOLDINGS, HONG KONG
DEEPWATER CONTAINER TERMINAL GDAŃSK S.A.	UK
BALTIC AUTO CENTER SP. Z O.O., GDYNIA	JAPAN
STENA LINE POLSKA SP. Z O.O., GDYNIA	STENA LINE, SWEDEN
DAMEN SHIPYARDS GDYNIA S.A.	DAMEN SHIPYARDS GROUP, HOLLAND
FINANCE	
STU ERGO HESTIA S.A., SOPOT	MUNICH RE, GERMANY
GE MONEY BANK S.A., GDAŃSK	GE, USA
NORDEA BANK S.A., GDYNIA	NORDEA, SWEDEN
FUTURA LEASING S.A., PRIME CAR MANAGEMENT S.A., GDAŃSK	GMAC, USA
REUTERS – MACROECONOMIC DATA CENTER, GDYNIA/GDAŃSK	REUTERS, USA
GENERAL INDUSTRY	
INTERNATIONAL PAPER, KWIDZYN S.A.	INTERNATIONAL PAPER, USA
JOHANN A. KRAUSE POLSKA SP. Z O.O., GDAŃSK	THYSSENKRUPP, GERMANY
SURUGA POLSKA SP. Z O.O., GDAŃSK	SURUGA SEIKI, JAPAN
AMHIL EUROPA SP. Z O.O., KARTOSZYNO	AMHIL ENTERPRISES, CANADA

GENERAL INDUSTRY

FABRYKA PLASTIKÓW POMERANIA SP. Z O.O., KWIDZYN	PLASTIVALOIRE, FRANCE
LEMAHIEU POLSKA SP. Z O.O., KWIDZYN	LEMAHIEU, BELGIUM
FEDERAL-MOGUL BIMET S.A., GDAŃSK	FEDERAL MOGUL, USA
FRANKE GASTOPOL SP. Z O.O., GDYNIA	FRANKE FOODSERVICE SYSTEMS, GERMANY
KNAUF PACK SP. Z O.O., KWIDZYN	KNAUF SNC, FRANCE
NEFAB PACKAGING POLAND SP. Z O.O., TCZEW	NEFAB, SWEDEN
TAPFLO SP. Z O.O., TCZEW	TAPFLO, SWEDEN
GFM KLOSE SP. Z O.O., GOŚCICINO	KLOSE KOLLEKTION, GERMANY
POLCOVA SP. Z O.O., WEJHEROWO	SPAIN
PIPELIFE SP. Z O.O., KARTOSZYNO	WIENERBERGER, AUSTRIA
DELLNER COUPLERS SP. Z O.O., GDYNIA	DELLNER COUPLERS, SWEDEN
TEKOSOM POLAND SP. Z O.O., ŻUKOWO	TEKOSOM SVENSKA, SWEDEN
BERENDSEN TEXTILE SERVICE SP. Z O.O., ŻUKOWO	SOPHUS BERENDSEN, DENMARK
ASHLAND POLAND SP. Z O.O., ŻUKOWO	ASHLAND, USA
KAPPA GDAŃSK SP. Z O.O., PRUSZCZ GDAŃSKI	KAPPA PACKAGING, HOLLAND

FOOD PROCESSING

FARM FRITES POLAND SP. Z O.O., LĘBORK	FARM FRITES, AVIKO, HOLLAND
UNILEVER POLSKA S.A., ŻUKOWO	UNILEVER, HOLLAND
COCA COLA HBC POLSKA SP. Z O.O., GDYNIA	COCA COLA COMPANY, USA
DR. OETKER POLSKA SP. Z O.O., GDAŃSK	DR. OETKER, GERMANY
GLENCORE POLSKA SP. Z O.O., GDAŃSK	GLENCORE INTERNATIONAL, SWITZERLAND
BALTIC MALT SP. Z O.O., GDAŃSK	FRIEDRICH WEISSHEIMER MALZFABRIK, GERMANY
RIEBER FOODS POLSKA S.A., GNIEWINO	RIEBER & SON, NORWAY
TAN-VIET INTERNATIONAL LTD SP. Z O.O., GDAŃSK	VIETNAM
GDAŃSKIE MŁYNY I SPICHLERZE DR. CORDESMEYER SP. Z O.O., GDAŃSK	HEMELTER MUHLE, GERMANY

PUBLIC UTILITIES - ELECTRICITY, WATER, HEATING

SAUR NEPTUN GDAŃSK S.A.	SAUR, FRANCE
ZESPÓŁ ELEKTROCIEPŁOWNI WYBRZEŻE S.A., GDAŃSK	EDF, GDF, FRANCE
GDAŃSKIE PRZEDSIĘBIORSTWO ENERGETYKI CIEPLNEJ SP. Z O.O.	STADTWERKE LEIPZIG, GERMANY
BAŁTYK GAZ SP. Z O.O., RUMIA	PROPAN RHEINGAS, WESTFALEN, GERMANY
DALKIA SOPOT SP. Z O.O., SOPOT	VIVENDI, FRANCE
PORT SERVICE SP. Z O.O., GDAŃSK	BLUM, GERMANY
THERMINVEST SP. Z O.O., GDAŃSK	E.ON RUHRGAS INTERNATIONAL, GERMANY

CONSTRUCTION

GPRD SKANSKA S.A., GDAŃSK	SKANSKA, SWEDEN
HYDROBUDOWA S.A., GDAŃSK	NCC, SWEDEN
SAINT-GOBAIN WEBER TERRANOVA SP. Z O.O., GDYNIA	SAINT-GOBAIN, FRANCE
BE&K EUROPE SP. Z O.O., KWIDZYN	BE&K, USA
HEMPEL POLAND SP. Z O.O., GDAŃSK	HEMPEL, DENMARK
POLBET B-COMPLEX S.A., GDAŃSK	CRH, IRELAND
LSMW SP. Z O.O. ODDZIAŁ W POLSCE, GDAŃSK	M+W ZANDER, GERMANY

2. BALTIC METROPOLIS WITH A TASTE FOR TRADE AND FREEDOM

2.1. Historical importance and origins of the Gdańsk Metropolitan Area

The history of the Gdańsk Metropolitan Area, as a group of towns, communes and counties situated around Gdańsk, Sopot and Gdynia, is closely linked to the sea, trade and freedom. Located on the Baltic Sea, at the mouth of the Vistula River, it owes its early importance to the enterprise and initiative of its citizens. The Hanseatic League (established in 1354), with Gdańsk as its important member, was founded on the ideas of free trade and a supranational merchant solidarity. Gdańsk contributed to the League with prudence and often with courage, acting "nec temere, nec timide" and exploiting its "genius loci" to develop politically and economically, at the same time supporting culture, crafts and science. Thus, Gdańsk was a key precursor of the symbiosis between economic freedom and social solidarity that has become the fundamental basis for contemporary European society. The city was also an excellent example to other European urban centres of the enormous benefits of international trade. Gdańsk, along with Lübeck, was a key town in the Hanseatic structure. The prominence is reflected in the architectural heritage and beauty of its old streets and buildings, including the largest brick church in Europe – St. Mary's Basilica – which remain impressive until the present day.



The thirst for discovery and knowledge displayed by the inhabitants of Gdańsk was quenched by Johannes Hevelius, the outstanding astronomer, constructor of telescopes and the pendulum clock and discoverer of seven new constellations. Some time later, Daniel Fahrenheit, also from Gdańsk, created the thermometer and came up with his own temperature scale, now widely used in Anglo-Saxon countries.

In the noble field of philosophy, a prominent position is held by Arthur Schopenhauer, whose work had a major influence on his contemporaries and remains relevant till today. Among recent famous Nobel laureates from Pomorskie one can list Lech Wałęsa and Günter Grass.

Gdańsk also became a symbol of the struggle for independence and freedom. In 1980, in Gdańsk and Gdynia the first independent trade union in the Eastern bloc, "Solidarność" (Solidarity) led by Lech Wałęsa, was established. It triggered the avalanche of changes that led to the fall of communism in 1989, enabling eradication of the divisions in Europe and the subsequent enlargement of the European Union.

This story shows that dreams of freedom and decent work can overcome even the most totalitarian of systems. To commemorate these events a European Solidarity Centre is being established in Gdańsk with the goal of propagating and supporting the ideas of democracy.

2.2. Central Gdańsk Metropolitan Area

Three diverse city organisms, Gdańsk, Sopot and Gdynia, with over 794,000 inhabitants, form the centre of the Gdańsk Metropolitan Area.

The oldest of them is **Gdańsk** (with 460,500 inhabitants), a city with an over 1000-year multicultural tradition. The rich merchants who had inhabited the city for many centuries, left for us a magnificent heritage of material culture. In 1945, as a result of the war, Gdańsk was nearly totally destroyed. Thanks to the determination and commitment of its inhabitants it was rebuilt and restored to its previous glory.



Today it constitutes the focal point of the Gdańsk Metropolitan Area and is home to the most important offices and institutions of Pomorskie Voivodeship. At the same time, it remains a strong hub of the maritime industry (ports and shipyards) and a focus point of many modern and developing economic sectors: information technology, pharmaceuticals, production, petrochemicals, service centres, research and development, etc.



Sopot (40,500 inhabitants) is a spa town well known throughout Europe. Every summer it becomes the centre of Polish and international entertainment, culture and sport. As a fashionable health resort it also hosts important international events, such as music festivals and the ATP Orange Prokom Open tennis tournament. Sopot plays a vital role in recreation, entertainment and sport in the Gdańsk Metropolitan Area. Every year numerous celebrities of the political, cultural and business scene make Sopot the place to be.



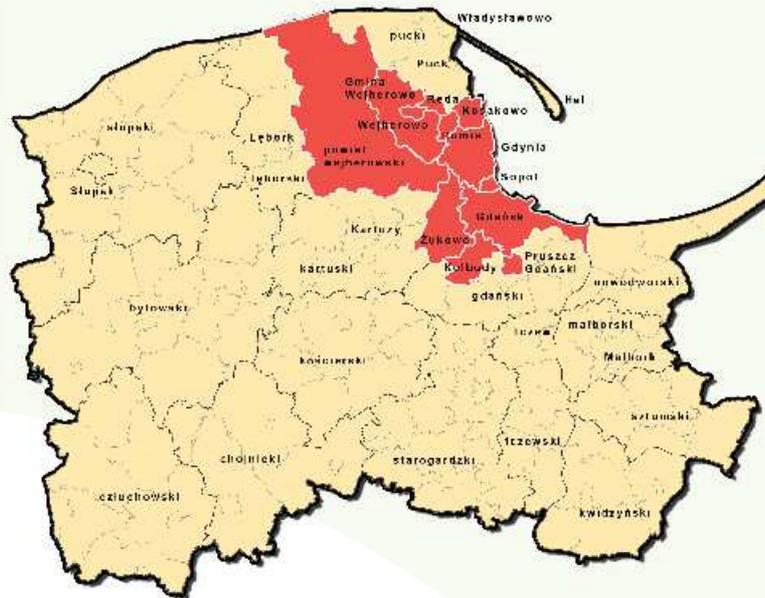
Gdynia (253,000 inhabitants) is the youngest city in the Gdańsk Metropolitan Area. Established in 1926, in just fifteen years it had become a large and important Baltic port and today is an important centre of the most modern sectors of the Polish economy.

The entrepreneurial spirit of the city has never deserted the inhabitants of Gdynia even during the totalitarian system rule, which had lasted for a number of decades. The city, founded as it was on individual economic initiative and entrepreneurship, became the symbol of Poland's rapid transformation, with numerous sea-related investments, such as the container port and liquid fertiliser transshipment base and the large shipyard. Today, Gdynia remains a vital port of the Metropolitan Area, able to accept all vessels, even the largest of passenger ships.

2.3. The Gdańsk Metropolitan Area grows and unites

The towns, communes and counties of the Gdańsk Metropolitan Area are currently undergoing a stage of merging of territories and infrastructure into a single unified organism. Many towns and suburban communes - Wejherowo, Rumia, Żukowo, Pruszcz Gdański, Reda, Kolbudy and Kosakowo – are located in direct proximity to the Metropolis. This forms an immense, interweaving labour, services and educational market zone, marked by modern commercial, medical, cultural and entertainment centres. The integration process in the public utilities area is well advanced. Public transport networks have been combined, creating the unified city railway system, and water, heating and gas supply systems have been integrated into two subsystems.

Graph 2.1. The Gdańsk Metropolitan Area and its surroundings



Source: Own study

In the outer Metropolitan zone, regional centres such as Puck and Władysławowo, Kartuzi, Tczew, Nowy Dwór Gdański and even Lębork, create increasingly stronger ties.

In this zone one may observe systematic growth in economic activity of local residents and investors, both from Poland and abroad, who are strengthening their business relations with constantly increasing intensity. The towns and villages located further from the centre of the Gdańsk Metropolitan Area also play an important cultural, sporting and recreation role. For example, one of the most important and dynamically developing European centres for windsurfing and kite surfing is located on the Hel Peninsula.



The diverse structure of towns and communes of the Gdańsk Metropolitan Area create a multifunctional and complementary organism. The process of integrating such diverse organisms is taking place at various levels. The Gdańsk Metropolitan Area Council, made up of local self-governments of Pomorskie Voivodeship, plays the role of an integrating institution. The main areas of cooperation between the Council Members include such sectors as communications, transport, marketing, promotion and coordination of shared investments. The political stability of the regional authorities is also worth a mention. Their high re-election ratio guarantees continuity of changes being implemented in the Gdańsk Metropolitan Area and supports long-term, sustainable economic development.

2.4. The bridging part of Baltic Europe



The connecting routes of the Gdańsk Metropolitan Area predestine it to the role of a bridge leading from the Baltic into Central Europe.

A cross-border cooperation network, encompassing not only the Baltic EU countries, but also Norway and the Kaliningrad District of Russia, is currently being established. The Gdańsk Metropolitan Area is connected to the world via Lech Wałęsa Airport in Gdańsk, which as is estimated, will have provide service to nearly 1 million passengers by the end of 2006. The seaports of Gdańsk and Gdynia are the main operators of multimode transport and specialist port services, related to the chemicals industry (crude oil, fertilisers and sulphur) and the metallurgical industry (shipyards and exports of steel products). Many international organisations and programmes have their headquarters in the Gdańsk Metropolitan Area: **UBC** (Union of Baltic Cities), **VASAB 2010** (Visions and Strategies around the Baltic Sea, 2010) and the office of the Baltic cultural cooperation network **Ars**.

2.5. Strategic development priorities of the Gdańsk Metropolitan Area

One of the main priorities in the Developmental Strategy of Pomorskie Voivodeship, consists of entrepreneurial competitiveness, innovation and high achievement in education and science. Particular attention is drawn to strengthening the position of the Gdańsk Metropolitan Area and increasing its regional importance in Baltic Europe. Local self-governments of administrative units making up the Gdańsk Metropolitan Area have created a set of strategies and activities aimed at facilitating faster and more dynamic development of the area. These guidelines will form the basis for the implementation of, among others, the developmental goals of the Regional Operational Programme – with the new EU programming period (2007-2013) budget of €1.2 billion. There also exist plans aimed at obtaining additional several hundred million euros from the EU structural funds (for infrastructure and environmental protection, among others).

The Gdańsk Metropolitan Area is the main subject of the voivodeship's sectoral strategies. The strategy guidelines provide the basis for implementation of the area's long-term goals. One may mention three fundamental ones:

- Knowledge-based development, strengthening the system of supporting innovative development of sectors and institutions, as presented in the Regional Innovation Strategy for the Pomorskie Voivodeship. The role of the Gdańsk Metropolitan Area is of fundamental nature in this scope.
- Cohesive spatial development system for the Gdańsk Metropolitan Area, including above all, preservation of the natural environment of the coastal zone, with planned transport and settlement development presented in the acclaimed Pomorskie Voivodeship Zoning/ Spatial Development Plan, which was evaluated as being the best in the country.
- Creation of tourism network products as the basis for the Tourism Development Strategy for Pomorskie Voivodeship, 2004-2013.

The main positive factors contributing to the growth of the value of the Gdańsk Metropolitan Area are, in particular:

- human capital,
- economic potential,
- quality of life.

These are reviewed in detail in the following parts of this Memorandum.

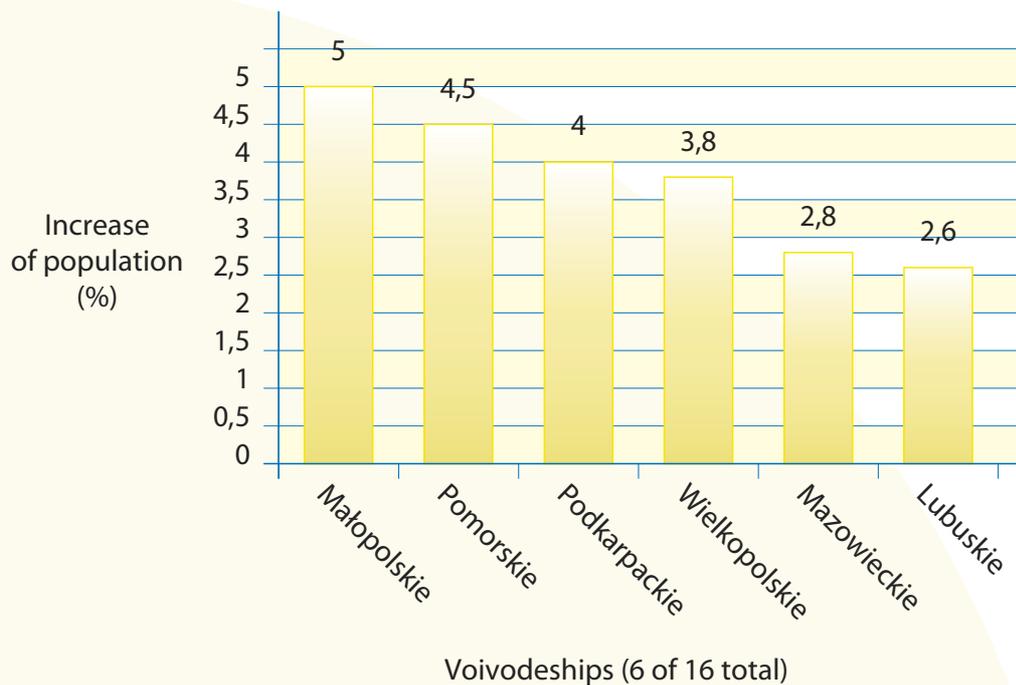
3. HUMAN CAPITAL AND LABOUR COSTS

3.1. Human capital

3.1.1. Social and demographic structure

Pomorskie Voivodeship is inhabited by 2.2 mln people, with over 1 mln of them making the Gdańsk Metropolitan Area their home. The population is approaching the size of Lithuania (3.5 mln), Latvia (2.3 mln) and Estonia (1.3 mln). The growth in the number of residents in recent years has averaged 4.5% a year, mainly due to a high birth-rate and immigration (Graph 3.1).

Graph 3.1. Voivodeships with the highest growth rates (1998-2005) in Poland



Source: Own calculations based on the Central Statistical Office (GUS) data

The voivodeship ranks second in Poland in terms of immigration rates, both domestic and from abroad. About 70% of its inhabitants live in cities (over 1.5 mln), the fourth highest level of urbanisation in the country. People aged under 17, i.e. the pre-working population, made up for about 22% of the voivodeship residents in 2005. The working population (men aged 18-64 and women aged 18-59) make up 64% of the population. Only 17% of Pomorskie Voivodeship inhabitants are over the work-retirement age.

3.1.2. Employment

The economy of Pomorskie Voivodeship enjoys a favourable demographic structure compared with other areas of the country. The share of farmers in the working population is 12%, in comparison with the Polish average of 22%.

High employment in the services sector, at 56% in Pomorskie Voivodeship versus the national 49% average, is yet another favourable factor. The most popular services sectors include financial intermediary services, IT, science, education and real estate.

Unemployment remains relatively high in the voivodeship. However, following Poland's EU accession, the unemployment rate dropped by 5 percentage points in two years and now stands at 18%. One must stress that unemployment in Gdańsk, Sopot and Gdynia is also systematically decreasing, currently being less than 7%. (Graph 3.2).

Graph 3.2. Unemployment in Pomorskie Voivodeship by county (May 2006)

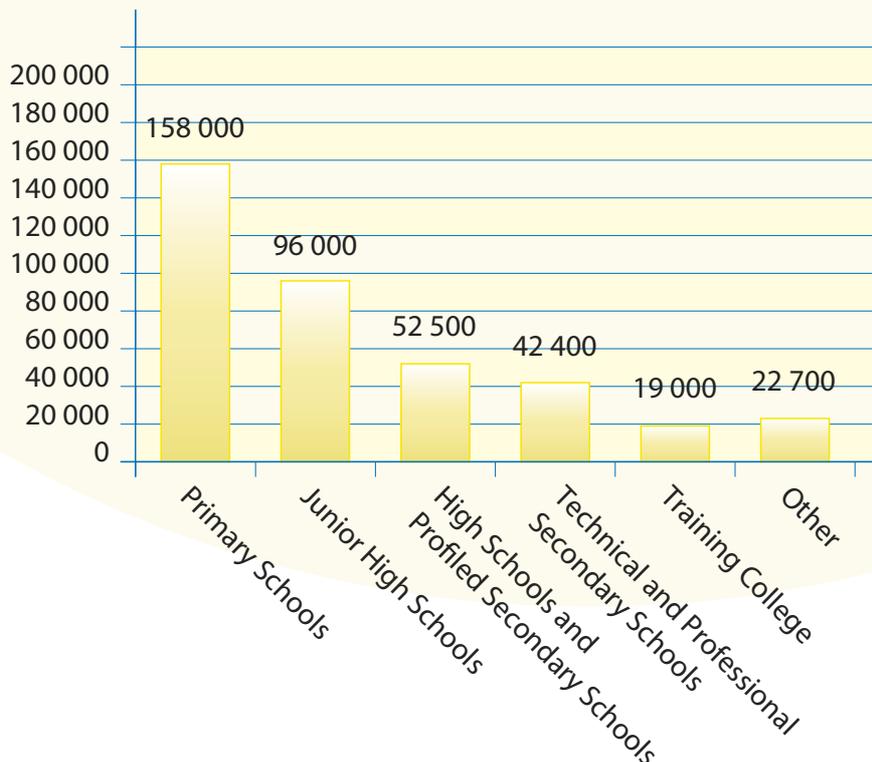


Source: Own calculations based on the Central Statistical Office (GUS) report on the socio-economic situation in Pomorskie Voivodeship, May 2006

3.1.3. Elementary and secondary school education

About 158,000 students attended 710 elementary schools across the voivodeship in the 2005/2006 school year. Pomorskie's 397 middle schools had 95,900 attendees, while a further 40,000 students went to 145 of voivodeship's secondary schools. The strong potential of the region's education system is reflected in the 4,250 scholarships awarded to students in 2005.

Graph 3.3. Number of elementary and high school students in Pomorskie in 05/06



Source: Own calculations based on the Central Statistical Office (GUS) data

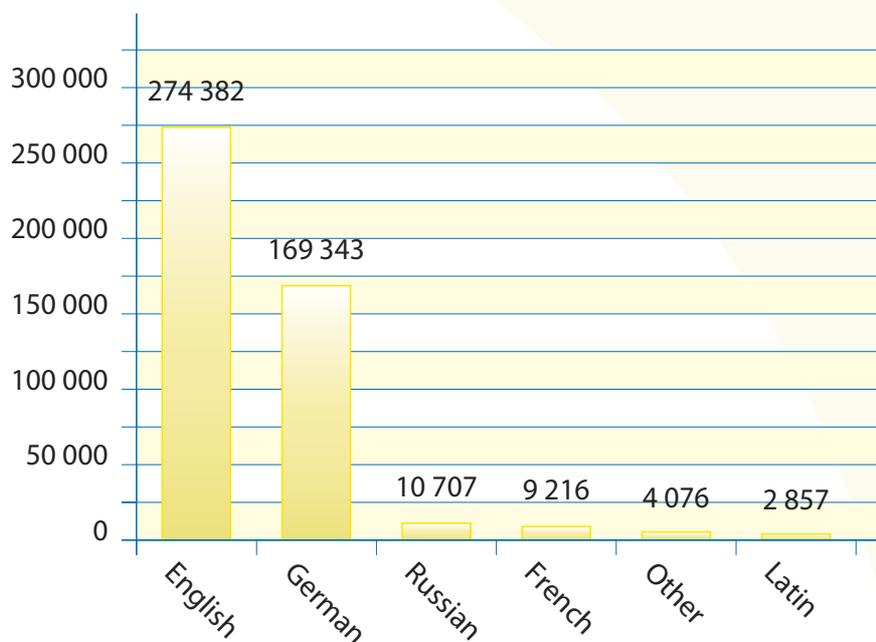
3.1.4. Foreign languages

The main foreign language taught in schools in the voivodeship is English (Graph 3.4). German is the second most popular choice. Over 90% of students at secondary school level have studied English. Spanish has also seen a significant surge in popularity (an increase of 49% in the number of students from a year earlier). Russian still accounts for a significant portion of foreign language teaching.

Three schools in the province offer courses taught in English, including an International Baccalaureate Programme:

- III Liceum Ogólnokształcące im. Bohaterów Westerplatte in Gdańsk,
- III Liceum Ogólnokształcące im. Marynarki Wojennej in Gdynia,
- The American Elementary and Middle School in Gdynia – the only school to offer all courses in English.

Graph 3.4. Elementary and secondary school pupils learning foreign languages in Pomorskie Voivodeship in 2005/2006



Source: Own calculations based on Central Statistical Office (GUS) data

University level students take the following foreign language courses – English, German, French, Spanish, Swedish, Japanese, Italian, Russian and Polish for foreigners.

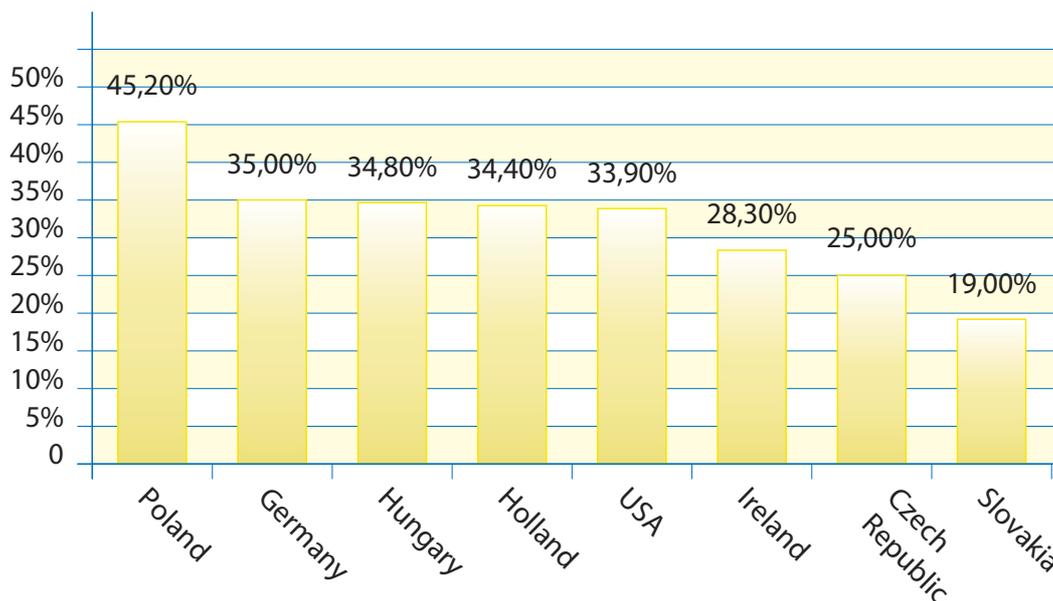
442 foreigners studied at the region's universities in 2005/2006. The majority of them, 231, studied at the Medical University of Gdańsk, 83 studied at the University of Gdańsk and 58 at the Gdańsk University of Technology.

3.1.5. Higher education & research institutes

About 1.8 mln people across Poland study at wide range of universities. Poland has enjoyed a high ratio of students in the 20-24 age group for the last several years. The country has overtaken Germany, Hungary, Holland, the USA, Ireland, the Czech Republic and Slovakia in this regard, according to the OECD's "Education at a glance" research report.

Education in Poland is very widely seen as an investment, securing a satisfactory salary, career prospects and limiting the risk of unemployment. As a result, the percentage of young people undertaking studies has been on a constant rise since the 1990s.

Graph 3.5. Percentage of the 20-24 age group attaining higher education in Poland in 2003 (Poland in comparison with other countries)



Source: Own calculations based on "Education at a Glance," OECD, 2003

In the 2005/2006 school year 98,000 students attended 28 various universities in the region. The majority of them, 74.0%, attended state higher education units, although the actual number of small, private higher education centres now exceeds those in the public sector (71% are private).

Table 3.1. Students and graduates of Pomorskie Voivodeship universities in 2005

UNIVERSITIES	Students	Graduates
Overall	97861	18769
University of Gdańsk	29311	5582
Gdańsk University of Technology	17634	2168
Economic universities and colleges	9247	1931
Medical University of Gdańsk	4192	655
Gdynia Maritime University	7607	1790
Pomeranian Pedagogical University, Słupsk	8129	2846
Physical education universities	4106	817
Art universities and colleges	1472	256
Vocational colleges	12149	1322
Others	4014	1402

Source: Own calculations based on Central Statistical Office (GUS) data

The largest universities of the Gdańsk Metropolitan Area include:

The University of Gdańsk

The University of Gdańsk is the region's largest university, educating almost 30% of all the region's students. It offers nearly thirty different fields of study and over 100 specialisations. Its ten faculties, located in Gdańsk, Sopot and Gdynia, host nearly 33,000 students supervised by 1,700 academic staff. Thanks to its staff's efforts the school has a chance to become an incubator of entrepreneurship in such fields as biology, biotechnology and chemistry. Currently, the university cooperates in these fields with universities from all over Europe.



Gdańsk University of Technology

Gdańsk University of Technology, with over one hundred years of history behind it, is the Gdańsk Metropolitan Area's second largest higher education centre. It consists of nine faculties and has nearly 18,000 students on various engineering, natural science and architecture courses conducted at vocational, masters and PhD levels through full-time, extension and external learning systems. The university topped the 2005 Newsweek university ranking in the technology schools category. The school employs 2,600 academics.

The Medical University of Gdańsk

The Medical University of Gdańsk is a state higher education unit offering courses in areas such as medicine, dentistry, pharmaceuticals, laboratory analysis and biotechnology. The university also offers full-time studies in English, currently with a number of students from a range of European and Asian countries, as well as from the USA. The school employs nearly 1,000 academics, including over 140 professors.

The university's research teams in oncology, radiotherapy, nephrology, haematology departments, as well as the basic sciences – cytogenetics, molecular diagnostics and pharmaceuticals analysis - are acknowledged at both domestic and international levels. The university additionally specialises, thanks to the incorporation of the Institute of Maritime and Tropical Medicine, in tropical and maritime medicine, with a special focus on developments in the field of hyperbaric medicine.

Gdynia Maritime University

Gdynia Maritime University offers education for future merchant navy officers, highly qualified naval specialists, port officials, transportation managers and other specialists needed for the maritime economy. The university offers engineering and post-graduate studies, complimentary studies for naval officers and specialists, external studies and training and other courses. The university takes part in research and educational cooperation with other maritime schools in Bremen, Bremerhaven, Havre, Lisbon, Ostfriesland, Tallin, Cork, Haiphong, Shanghai, King's Point and Launceston.

Others

The largest private schools in the Gdańsk Metropolitan Area include Gdańsk Management College, Sopot College of Finance and Accountancy, the Socio-Economic Academy in Gdańsk, Business and Administration School in Gdynia, the Gdańsk School of Banking, the Gdańsk Higher School of Humanities and the Gdynia School of International Economic and Political Affairs.

Academic fields of study

In the 2005/2006 academic year, 18,800 students graduated from the region's colleges and universities, a 5.6% increase from the academic year of 2004/2005.

Table 3.2. Students and graduates in selected majors in Pomorskie Voivodeship in 2006

Field	Students	Graduates
Management and marketing	9593	2702
Finance, banking, accountancy	4255	1401
Medicine	4192	655
Economy	5308	649
Law and administration	6592	545
Information technology, econometrics	3929	392
Electronics, telecommunications	2109	249
Biology, chemistry, physics	1800	235
Biotechnology	754	146
Technology, industry, construction	14156	1420

Source: Own calculations based on GUS data

Beside the majors listed in the table, popular courses include transportation, shipping, logistics, Scandinavian studies, oceanography and maritime technology.

Other education institutions

Beside universities and colleges, several training and education institutions are located in the voivodeship, presenting a wide offer for people interested in enhancing their professional skills:

- over 120 language schools are located in the region, providing opportunities to improve language skill,
- Combidata Poland organises IT and electronics courses. The company is headquartered in Sopot, but has training facilities across Poland, including the major cities of Białystok, Katowice, Kraków, Poznań, Warszawa and Wrocław,
- The Polish Six Sigma Academy offers training courses, consulting and support in implementation of Six Sigma philosophy in companies,
- The Gdańsk Foundation for Management Development has courses in areas such as finance, law, marketing, IT, sales and an MBA programme run jointly with the University of Gdańsk,
- The Gdańsk Academy of Banking, which along with the Gdańsk Institute for Market Economics has been organising seminars, training sessions, courses and conducting R&D activities for over 14 years. The academy organises European Banking Study which gets the students ready for obtaining the EFEB certificate. In addition, it prepares students of Pomorskie's higher learning institutions for passing the CFA® (Chartered Financial Analyst®) exam.

Research institutions

The following institutions add to the region's R&D potential:

- Research institutes of the Polish Academy of Science: Institute of Hydro-engineering, the Szewalski Institute of Fluid-Flow Machinery, the Institute of Oceanology, the Institute of Mathematics,
- Other R&D institutes include: the Laser Technologies Centre, the European Centre for the Transfer of Innovations ECTI and the Ecobaltic Foundation,
- State institutions include the Ship Design and Research Centre, the Sea Fisheries Institute, the Maritime Institute, the R&D Marine Technology Centre, the Polish Geological Institute, as well as units of Warszawa-based institutions the Energy Institute, the Electrotechnical Institute and the National Institute of Telecommunications.
- The Gdańsk Institute for Market Economics, beside being an NGO, conducts economic analyses and forecasts and plays an educational role.

3.1.6. Selected R&D projects

The University of Gdańsk

- Treatment of deadly and rare genetic disease, Sanfilippo. A Polish team of scientists prepared a treatment methodology, a solution unique on a global scale. (Prof. G. Węgrzyn and his team).
- Finding a cure for the Mucopolysaccharidosis group of genetically determined diseases based on modulating gene expression. Previously the diseases were incurable.
- Synthesis and purification of a patented Cystapep compound. The compound shows strong anti-viral, anti-bacterial and anti-fungal characteristics and is generally anti-microbiotic. (Prof. F. Kasprzykowski).
- Optimisation of the UNRES force field for ab initio prediction of protein structures based on amino-acid sequences and simulation of protein folding process during denaturation and renaturation processes. (Prof. J., A. Liwo, together with Prof. H. Scheraga, Cornell University, US).
- Research on laser diagnostics and cancer therapy utilising sensophiryne (synthetic substance created in Poland), which groups in cells affected by cancer, glows when treated with specific lasers (useful for diagnostics) or absorbs the light and destroys cancer-affected cells (useful in therapy). The method is expected to be successful in fighting cases of skin and breast cancer (Prof. P. Kwiek).

Gdańsk University of Technology

- Together with the Polpharma drug manufacturer, the inventor of a new method for preparing alendronate sodium, a key substance in the most efficient osteoporosis remedy to date. Based on this method, the "Ostemax 70 comfort" medication is produced. The team, lead by Prof. J. Rachoń, received an award from the President of Poland for designing the drug. Ostemax is a good example of the utilisation of Gdańsk University of Technology's research potential in cooperation with business partners. The method invented at the university is not only cheaper, but also easier on the environment compared with previously used methods. Implementation on a production scale has allowed Polpharma to become one of the leading osteoporosis drug makers in the world.

- The design of a speech aid device for stuttering people. The digital corrector designed at the university will be significantly cheaper than its Western-built counterparts. (Prof. A. Czyżewski and M. Roland-Mieszkowski).
- Design of the first Polish cyclone reactor prototype and one of the first in the world. The invention can be used in waste management, sewage treatment and combating air and underground water pollution. Thanks to its small size the reactor also can be used in fighting air pollution caused by terrorist attacks or chemical catastrophe. (Prof. J. Hupka and his team).

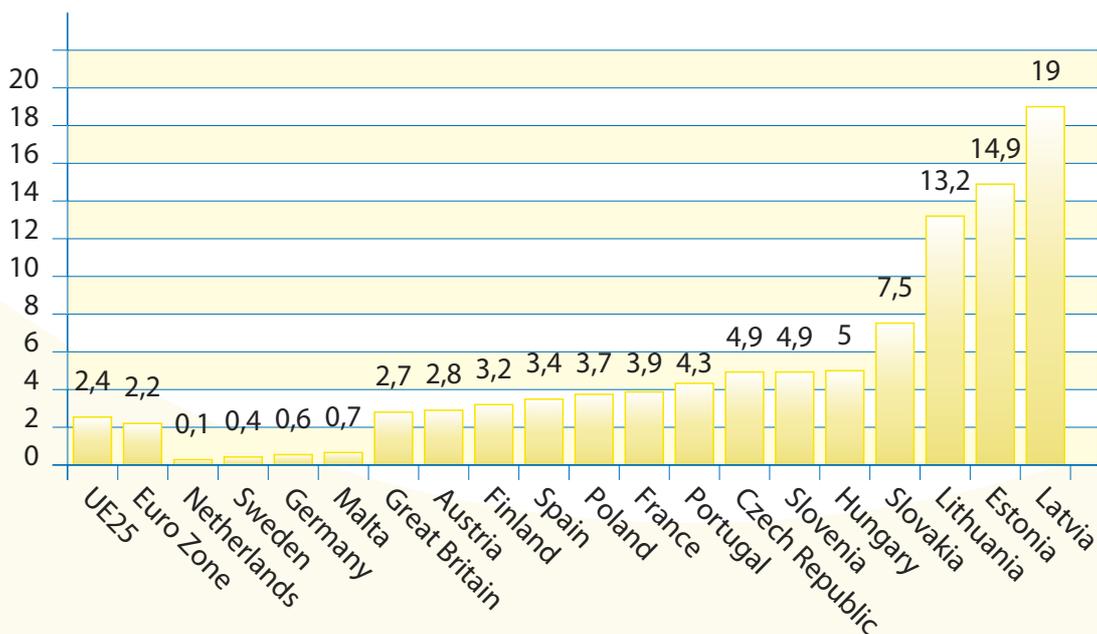
Gdańsk Medical University

- Research on cytogenetics and cancer molecular diagnostics (Prof. J. Limon).
- Research on pharmaceuticals analysis (Prof. R. Kaliszan).
- The Inter-institutional Biotechnology Department in cooperation with the University of Gdańsk.
- Planned launch of medical engineering studies in cooperation with the Gdańsk University of Technology. Cooperation takes place on larger research projects, for example a plan to develop research facilities under the Gdańsk Science and Technology Park scheme.
- The university cooperates with numerous international institutions and medical schools in Europe and beyond. It is also a part of network organisations such as the Baltic Sea Region University Network and ScanBalt, a meta-regional initiative in biotechnology and medicine.

3.2. Labour costs

Polish society is one of the hardest working in the world, second only to South Koreans, a 2005 report by the OECD showed. On average, Polish employees worked 600 hours a year more than their German or French counterparts.

Graph 3.6. Nominal hourly labour costs in the EU in 2006 (annual % change)



Source: Eurostat

All of the new EU members, including Poland, enjoy significantly lower labour costs in comparison with the “old EU” nations.

Table 3.3. Lowest and highest employment costs in selected European countries in 2004

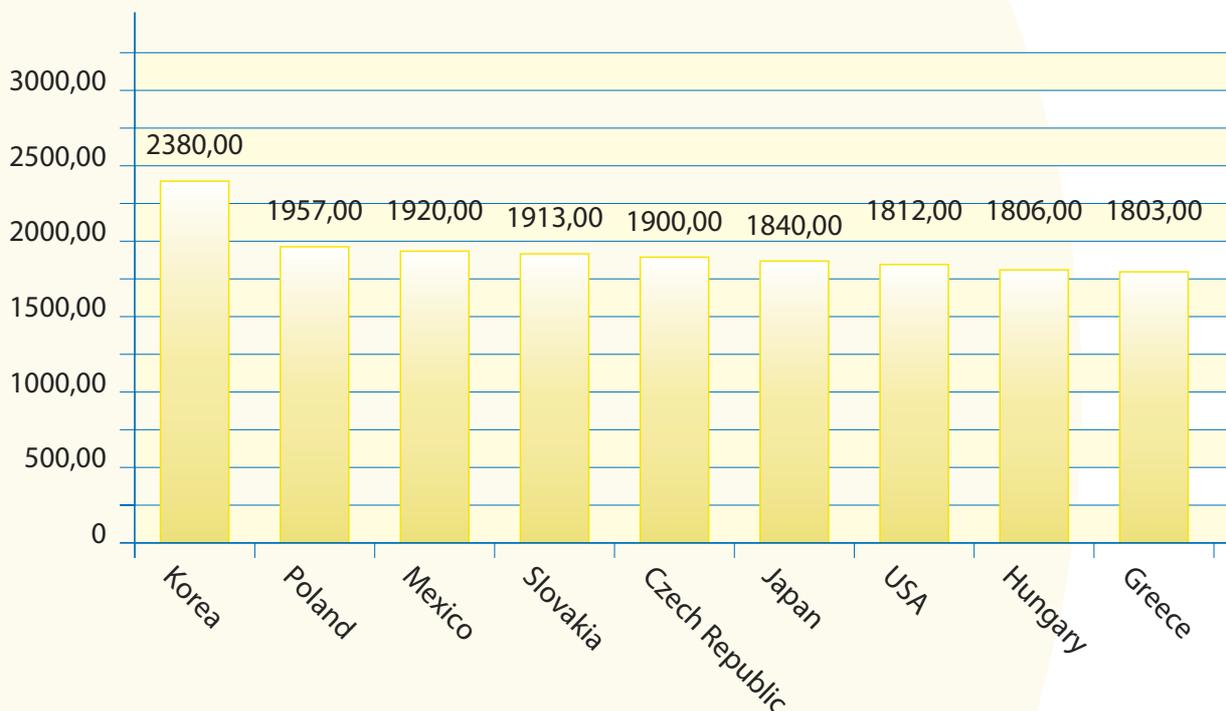
Highest annual labour costs in 2004 (EUR)		Lowest annual labour costs in 2004 (EUR)	
• Norway	- 43,000	• Slovenia	- 12,000
• Denmark	- 42,000	• Czech Republic	- 8,000
• UK	- 39,000	• Poland	- 7,000
• Luxembourg	- 38,000	• Hungary	- 6,000
• Germany	- 37,000	• Slovakia	- 6,000
• Holland	- 34,000	• Estonia	- 5,000
• Ireland	- 32,000	• Lithuania	- 5,000
• Sweden	- 32,000	• Latvia	- 4,000

Source: Own calculations based on Eurostat data

Annual labour costs are calculated based on full-time male employment, including all obligatory and non-mandatory benefits secured by the employer for the employee.

In order to calculate the full cost for an employer, pre-tax salary needs to be increased by about 20%, as the cost includes the salary and non-tax obligations of the employer (obligatory state pension and healthcare insurance, participation in training fees) amounting to about 20% of the pre-tax salary.

Graph 3.7. Average work hours per employee in 2004 (Poland compared to selected countries)



Source: Own calculations based on “Employment Outlook,” OECD, 2005

In a comparison with average wages in other Polish cities in 2005 (Table 3.5), Gdańsk, the capital of Pomorskie Voivodeship ranked ninth, following Kraków, Wrocław, Łódź, Opole, Szczecin, Poznań, Katowice and Warszawa. The average wage of a low-level employee is 30% lower in comparison with Warszawa, the salary of specialist 35% lower, manager's 41% lower and director's 33% lower.

Monthly pre-tax wages in Pomorskie Voivodeship companies averaged €661.18 in May 2006, being only 1% above the national average. By comparison, the average wage in Warszawa was €830.33, i.e. 27% above the national average.

Table 3.4. Pre-tax and net wage per work hour in the Gdańsk Metropolitan Area and other cities in the world

City	Gross salary per hour	
	Gross Zurich=100	Net Zurich=100
Copenhagen	100,6	76,0
Zurich	100,0	100,0
Dublin	77,9	81,1
New York	82,8	76,9
London	68,4	66,5
Berlin	84,6	72,2
Tokyo	64,7	66,7
Paris	60,0	58,7
Montreal	77,3	74,1
Sydney	62,1	62,9
Madrid	52,3	58,2
Hong Kong	29,8	35,0
Rio de Janeiro	23,4	25,8
The Gdańsk Metropolitan Area	21,4	17,8

Source: Own calculations based on prices and earnings. Update 2005. Comparison of purchasing power around the globe," UBS AG Wealth Management Research, 2005

Considering the comparison in Table 3.4, the Gdańsk Metropolitan Area turns out to be a very attractive region in terms of labour costs.

Table 3.5. Average wages in Polish cities by professional position in 2005 (all data in EUR)

City	Low-level employee	specialist	manager	director	president/ general director
Warszawa	620	1053	1542	2699	3084
Katowice	475	720	899	1201	no data
Poznań	462	764	1105	1658	1799
Szczecin	462	668	771	1208	1542
Opole	462	591	904	899	1542
Łódź	452	604	867	1336	2056
Wrocław	450	714	1028	1876	1928
Kraków	447	694	951	1863	2062
Gdańsk	437	683	899	1800	no data

Source: Sedlak&Sedlak's "Internet Salary Survey"

Table 3.6. Average wages in Poland by industry (all data in EUR)

Area of occupation	Mazowieckie	Pomorskie
finance and controlling	1285	881
IT	1208	771
R&D	1151	771
marketing	1045	642
exports/imports	1035	720
human resources	1028	590
public relations	1024	507
sales	989	616
Technical, service	906	691
production	886	605
Logistics and transportation	865	642
quality	822	608
accountancy	796	529
administration	771	551
customer service	642	478
warehouse	569	394

Source: Own calculations based on Sedlak&Sedlak's "Internet Salary Survey"

Salaries are significantly lower in the Pomorskie Voivodeship compared with Warszawa, regardless of industry and professional position.

3.3. Social capital

3.3.1. Self-governing potential

The self-government system of the Gdańsk Metropolitan Area focuses its activities on accelerating privatisation, improving transparency and good governance practice, as well as public-private partnerships. It aims to increase the area's attractiveness for investors through implementation of the "Regional Innovation Strategy for Pomorskie Voivodeship". The strategy is carried out via support extended to innovation-based projects of hi-tech technologies and promotion of patents created at local universities and R&D institutions, among others.

A number of employers' organisations operate in the region, including the Gdańsk Employers' Association, the Gdańsk Business Club, the Pomeranian Chamber of Skilled Crafts Small and Medium Sized Enterprises) and the Confederation of Financial Enterprises.

Members of the Gdańsk Employers' Association take an active part in the Economic Council of Pomorskie Voivodeship and the Voivodeship Social Dialogue Committee, as well as the Voivodeship Employment Board. Membership in the Gdańsk Employers' Association is obviously of a voluntary character, but the possibility of obtaining quick access to business contacts is an unquestionable benefit, especially for new members. Similar benefits for newcomers to the local business community await at the Gdańsk Business Club, a lobby of the region's business people, bringing together managers, entrepreneurs and intellectuals. Its main task, as in the case of the Gdańsk Employers' Association, is creation of favourable conditions for integration of the business community.

The Pomeranian Chamber of Skilled Crafts Small and Medium Sized Enterprises is an organisation grouping 25 craft guilds and five craft cooperatives. The chamber cooperates with craft organisations in France, Germany, Italy and Switzerland. It represents 1,600 companies from the SME sector, which provides employment to over 21,000 people.

In turn, the Confederation of Financial Enterprises, based in Gdańsk, is an employers' association established by a group of the largest Polish companies in the financial intermediation sector. The body brings together over thirty financial intermediation companies aimed at establishing mechanisms for developing cooperation both between its own members and similar entities operating in other EU countries. It also co-organises the Consumer Finance Congress dedicated to facilitating discussion on functioning conditions of the consumer finance market and its related areas.

3.3.2. Non-governmental organisations (NGOs)

For a number of years, Pomorskie has been one of the leading voivodeships in terms of civil activity carried out through independent non-governmental organisations. This is reflected not only in statistical data (nearly 4,000 NGOs operate in the region) but also in the exceptional character and importance of the created initiatives themselves, e.g.:

- The first independent trade union in the former Eastern bloc – Solidarity - founded in 1980, the 'seed' of other independent civil movements in Poland,
- Amnesty International Polska – registered in April 1990 – the first unit of Amnesty International in Central and Eastern Europe,
- The Association of Liberal Democratic Congress – organisation grouping Gdańsk's liberals which initiated liberal political and civic activity in the country,
- The Gdańsk Institute for Market Economics (IBnGR)– Central and Eastern Europe's first independent economic think-tank.

NGO activity in the region focuses on:

- scientific research,
- environmental protection,
- human rights,
- culture and art,
- regional economic and social development,
- education,
- healthcare.

Pomorskie Voivodeship was the first in Poland to prepare and implement a system for co-operation between local authorities and NGOs over 10 years ago. The voivodeship is also the place where the first Regional Information and Support Center for NGOs was established. Among the leaders of Pomorskie's NGO one will find many renowned citizens who make the Gdańsk Metropolitan Area their home. They include scientists, politicians and people representing the arts.

3.3.3. Cooperation platforms & partnerships

Gdańsk Science and Technology Park (GPN-T)

Gdańsk Science and Technology Park (GPN-T), a joint venture of Pomorskie Special Economic Zone, self-government authorities of Pomorskie, as well as, the Gdańsk University of Technology is an important element of the Pomorskie Innovation Network and a part of the Regional Innovation Strategy. The park is a model solution for cooperation between universities and other institutions. It is a place where science, innovative economy and entrepreneurship intertwine. The park is located in the immediate vicinity of three universities - the University of Gdańsk, Gdańsk Medical University and Gdańsk University of Technology. The GPN-T attracts global leaders in technological innovation and generates new jobs in the hi-tech sector. The plans of the Johann A. Krause company, part of the ThyssenKrupp group, to manufacture, assemble and install automatic machinery and manual workstations for engine, transmission and axle construction lines are an exemplary activity of the GPN-T.

Pomorskie Science and Technology Park (PPNT) in Gdynia

Pomorskie Science and Technology Park's main goal is to stimulate cooperation between the universities and business, with a special focus on the transfer of hi-tech and the development of businesses to implement them.

PPNT also aims at stimulating and restructuring the local economy and creating new and long-term employment.

The park consists of four main modules:

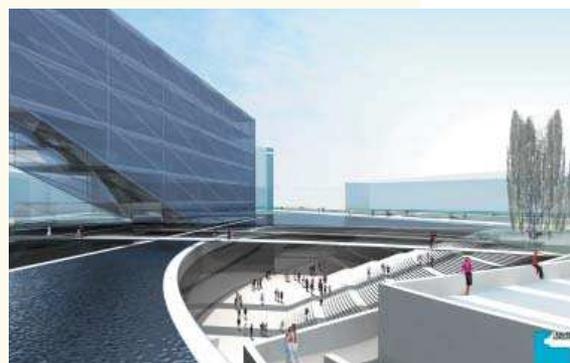
- biotechnology and environmental protection, with a development laboratory,
- IT,
- industrial design,
- a conference and exhibition facility.

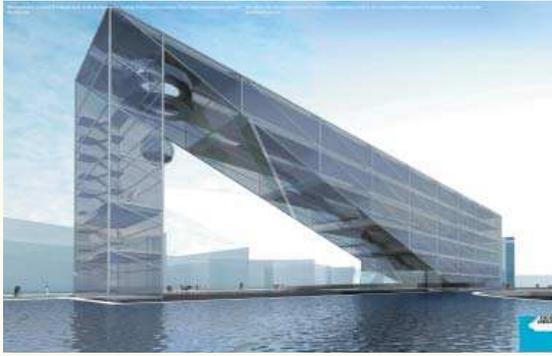
Starogard Industrial Park

Starogard Industrial Park is managed by POLHARMA pharmaceuticals producer. Located in the Pomorskie Special Economic Zone, it operates on the basis of an agreement with the zone's management. The park offers investment locations in the urban county of Starogard Gdański.

Gdańsk – The Young City Project

The Gdańsk Young City Project is the largest urban development project in the Gdańsk Metropolitan Area (covering a 70 ha area) and one of the largest in Poland. At the same time it is an example of good cooperation and partnership. The exceptional nature of the project is connected with the waterfront character of the site and the possibility of shaping an urbanite, multifunctional district right in the centre of Gdańsk from ground up. The project will be situated over a post-industrial, run-down area used in the past by the shipyard and no longer required for its needs but which will provide the new district with unique genius loci. The preserved industrial look of buildings, the street names stemming from shipbuilding occupations and numerous industrial relics will all add to the district's special feel, highlighting its maritime character.





At the same time, Young City has a chance to become a modern, multifunctional, metropolitan city district, combining workplaces with shopping and entertainment. Significant portion of the district will also be occupied by a new residential area. Construction will be carried out in eleven separated, smaller segments, each with their own specific character and individual urban programmes. The entire area remains subject to the official urban master plan with approved

initial, geodesic divisions supporting its spatial make up. This means stable investment conditions and is a guarantee of securing a site of high quality.

Centres of excellence

Within the network of Centres of Excellence and Competence Centres in Pomorskie Voivodeship one should make a distinct mention of:

- BALTDER - Centre of Excellence for Baltic Development, Education and Research – University of Gdańsk,
- BioMoBiL - Centre of Excellence in Bio-Safety and Molecular Biomedicine - University of Gdańsk,
- RECOURSE - Research and Education Centre for Urban Socio-Economic Development- University of Gdańsk,
- COCISA - Centre of Competence in Internet Security - University of Gdańsk,
- CEEAM - Centre of Excellence in Environmental Analysis and Monitoring - Gdańsk University of Technology,
- CURE - Centre for Urban Construction and Rehabilitation: Technology Transfer, Research and Education - Gdańsk University of Technology,
- CEMET - Centre of Medical Technologies - Gdańsk University of Technology,
- CLEANERPAS - Centre for Clean and Safe Technologies in Power Engineering - The Szewalski Institute of Fluid-Flow Machinery, Polish Academy of Science - Gdańsk,
- CeSSS - Centre for Shelf-Sea Science – Institute of Oceanology, Polish Academy of Science – Sopot,
- CEM - Centre for Environmental Engineering and Mechanics – Institute of Hydroengineering, Polish Academy of Science – Gdańsk,
- CEMTAR - Competence Centre for Marine Technology Applied Research – Ship Design and Research Centre, Gdańsk,
- POLMARF - Polish Marine Fisheries Science Centre – Sea Fisheries Institute in Gdynia.

4. REAL ESTATE - OFFICE, RETAIL AND INDUSTRIAL SPACE

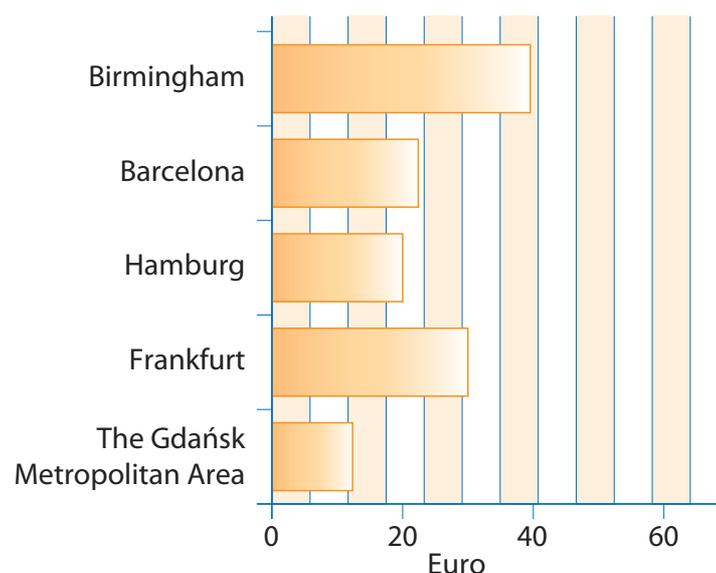
4.1. Office space in the Gdańsk Metropolitan Area in comparison with Europe and Poland

High quality, modern office space available for rent or purchase in the Gdańsk Metropolitan Area amounts to about 190,000 sqm and is located mostly in the TRI-City agglomeration, according to recent research by OBER HAUS Real Estate. Majority of the available space is found in the city of Gdynia (65%). The Gdańsk Metropolitan Area is experiencing a dynamic increase in the offer of office space of the highest, A-class standard.

Rents are lower than in other European Union cities, ranging between €9 and €17 per sqm per month¹, while EU prices tend to average at over €20 per sqm per month: Berlin (€21), Frankfurt (€33.5), Hamburg (€24.5), Barcelona (€24.5), Edinburgh (£26.5), Belfast (£12.75), Glasgow (£23) and Birmingham (£27.5)².



Graph 4.1. Office rents in the Gdańsk Metropolitan Area in comparison with other EU cities (€ per sqm per month) - first half of 2006



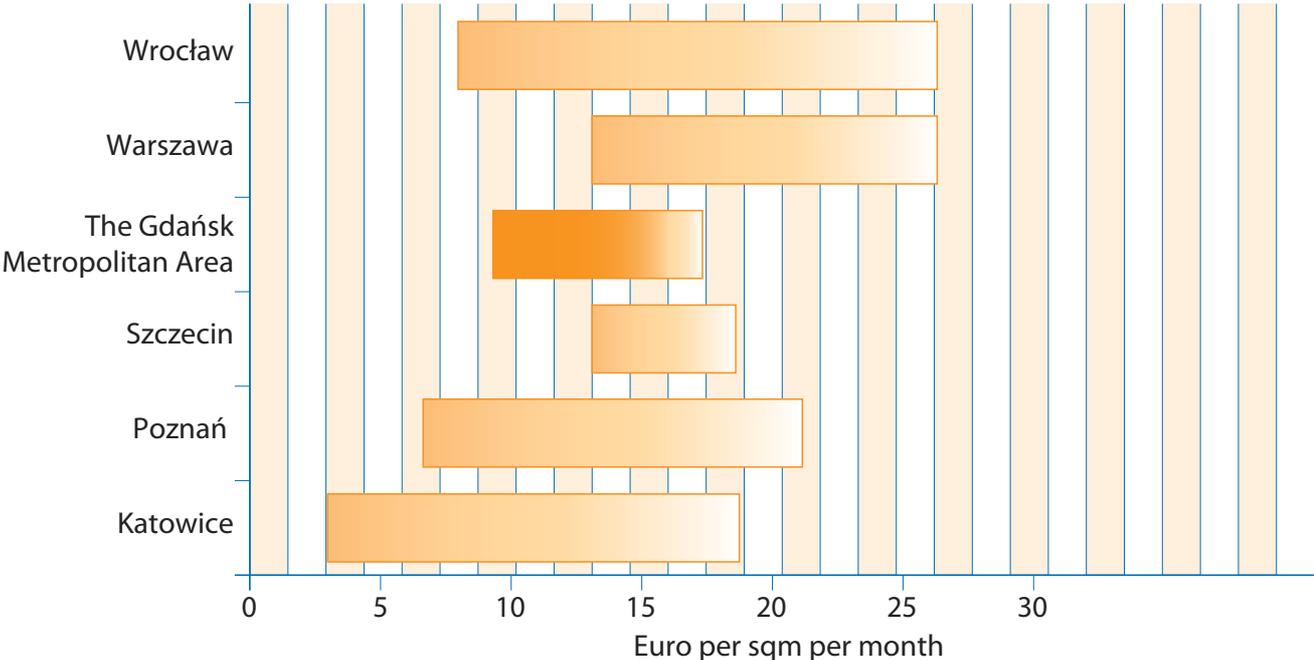
Source: Own calculations based on "EMEA Offices. Market View," CB Richard Ellis, First quarter 2006, for Gdańsk Metropolitan Area, own calculations based on C.H. Beck data

¹ Information on office and commercial space prices in large urban centres in Poland is based on data collected by the C.H. Beck publishing house and comes from real-estate agencies and offices operating throughout the country.

² Information on prices comes from the report: EMEA Offices. Market View, CB Richard Ellis, first quarter 2006.

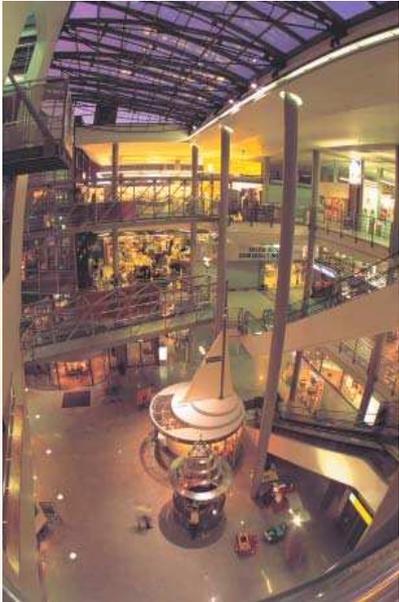
Rents in the Pomorskie Voivodeship are also attractive compared to other Polish cities, such as Warszawa, Wrocław and Szczecin. In addition, the price range is not as wide as in other cities. Obviously, prices for locations outside the urban centre of the Gdańsk Metropolitan Area are lower, ranging from €5 per sqm per month to €8 per sqm per month, while rents in Warszawa for similar office space ranges between €8 per sqm per month and €21 per sqm per month.

Graph 4.2. Office space rent in the Gdańsk Metropolitan Area in comparison with selected Polish cities – June 2006 (€ per sqm per month)

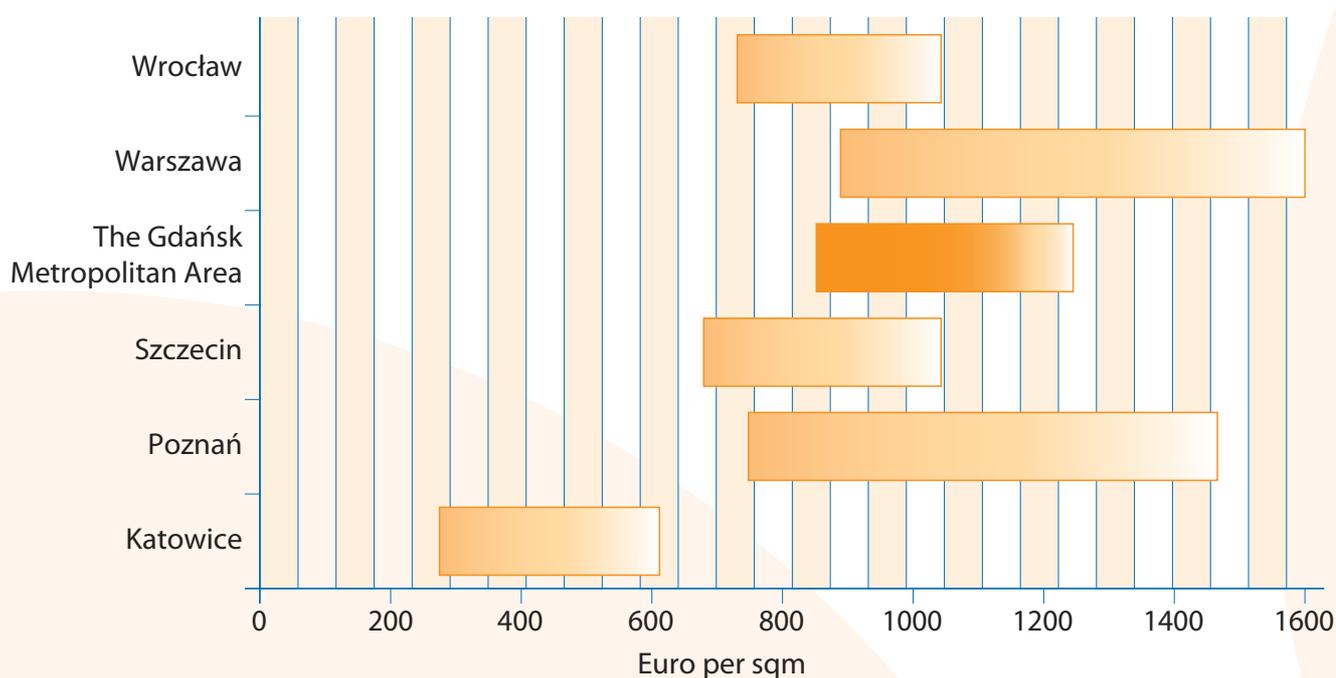


Source: Own calculations based on C.H. Beck data

Sales prices in the Gdańsk Metropolitan Area fall in the €835 - €1,221 per sqm per month range and are lower than Warszawa and Poznań prices, which range from €871 to €1,584 and €739 – €1,414, respectively. Prices outside the city centres are significantly lower, reaching from €385 per sqm to €770 per sqm.



Graph 4.3. Sales prices of office space in the Gdańsk Metropolitan Area compared to other conurbations in Poland (in central city areas), June 2006 (€ per sqm)



Source: Own calculations based on C.H. Beck data

The current offer of modern office space in the region is restricted to just over ten office buildings.

Table 4.1. Key office buildings in the Gdańsk Metropolitan Area

BUILDING NAME	CLASS	SPACE IN SQM	MONTHLY RENT PER SQM	SPACE FOR RENT IN SQM
ALFA PLAZA BUSINESS CENTER	A	13 300	negotiable	923
CENTRUM BIUROWE-HOSSA	B	9300	10-14 USD	1281
BALTIC BUSINESS CENTER	A	14 000	negotiable	1400
CHIPOLBROK	A	4900	15 USD	400
ALLCON DMOWSKIEGO	B	4900	negotiable	725
CENTROMOR	B	8000	12-24 euro	300
VIGO	B+	7000	13 euro	120
ALLCON CENTRUM SŁOWACKIEGO	A	6000	negotiable	b.d.
BIURA MANHATTAN	A	2500	13 euro	1000
CENTRUM KWIATKOWSKIEGO	B	3200	12 euro	2700
GDYŃSKIE CENTRUM BIZNES	C	6500	negotiable	853
ORGANICA TRADE	B	13 000	do 12 USD	3000

Source: Own calculations based on OBER HAUS reports and a Gazeta Biznes Trójmiejski report "Najlepsze Biurowce w Polsce 2005"

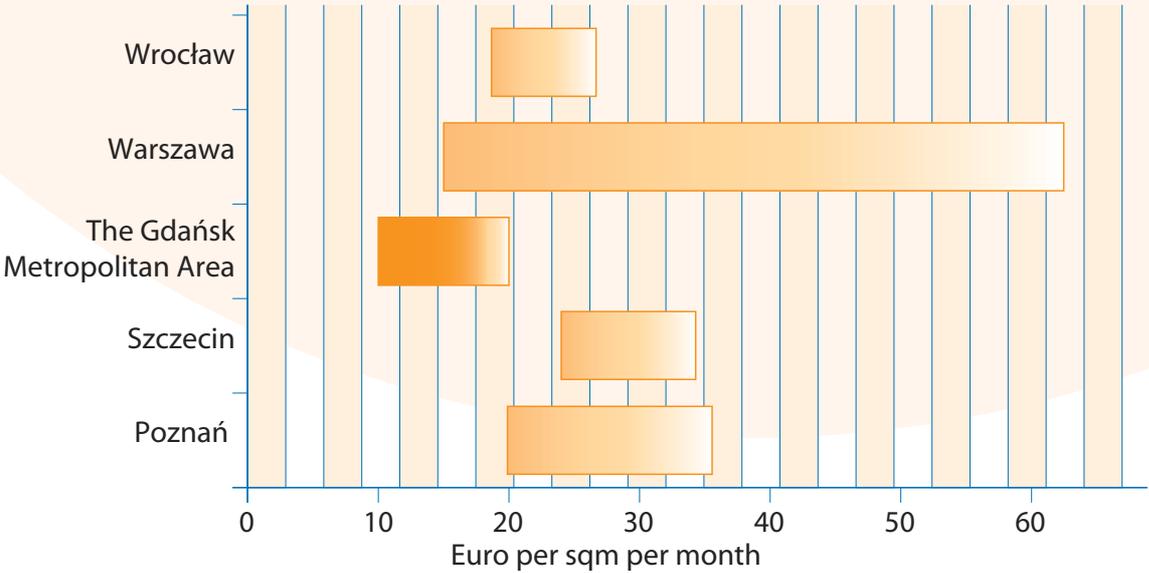
Prospects for growth in office space offer in the Gdańsk Metropolitan Area are very promising. The currently available amount is expected to double over the next three years, with Gdańsk alone contributing 150,000 sqm of new. At the moment, ten new office buildings are being constructed. NDI (www.ndi.pl) is currently constructing a 3,700 sqm office building in the centre of Sopot, Allcon (www.allcon.pl) is building the Łużycka Office Park complex in Gdynia, and Torus (www.torus.gda.pl) will begin construction of the Arkońska Office Centre in September 2006. This last project will include six office buildings, with the first construction phase consisting of two five-story buildings (A-class) with total floor space of 10,000 sqm.

4.2. Retail and industrial space in the Gdańsk Metropolitan Area in comparison with other Polish cities

Retail space rental in Pomorskie Voivodeship is significantly less expensive than in other Polish and European cities. In the city centres rents range from €10 to €19 per sqm /month. Meanwhile prices in Warszawa range from €14 to €61 per sqm per month. Rents in Poznań, Wrocław, and Szczecin are nearly double those in the Tri-City area.



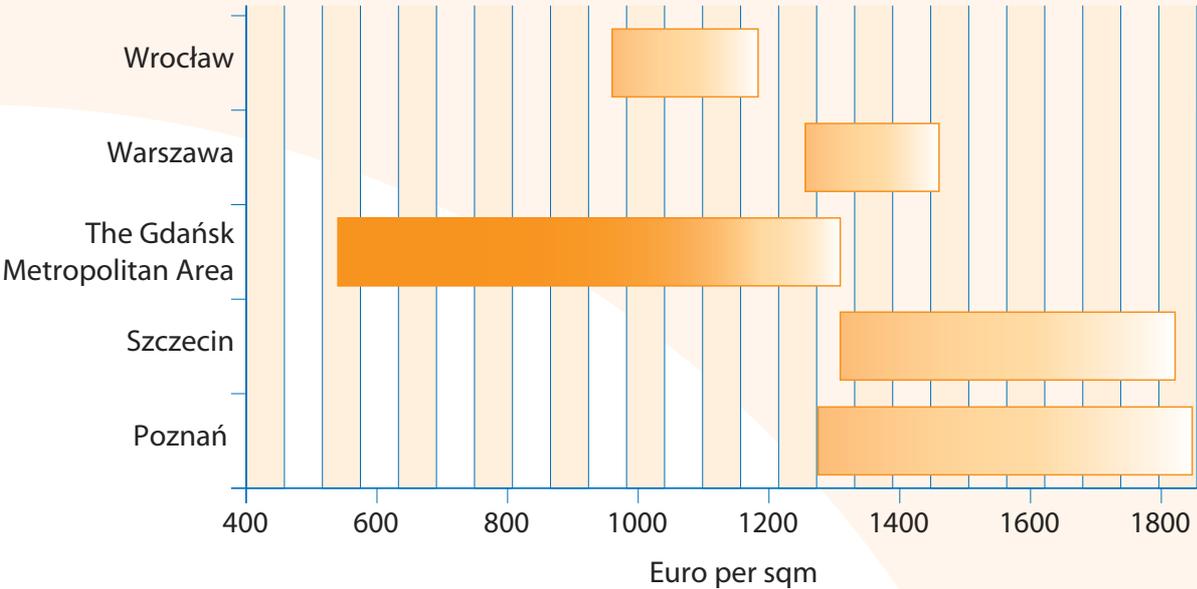
Graph 4.4. Retail rents in shopping centres in Pomorskie Voivodeship and other Polish cities, June 2006 (€ per sqm per month)



Source: Own calculations, based on C.H. Beck data

Sale prices of retail space in shopping centres of the Tri-City fall between €514 per sqm and €1,285 per sqm, and also are lower than in other Polish cities. In Warszawa, similar space sells for €1,232 – €1,439 per sqm and in Poznań for €1,246 – €1,825.

Graph 4.5. Sale prices of retail space in shopping centres of the Tri-City in comparison with selected Polish cities, June 2006 (€ per sqm)



Source: Own calculations, based on C.H. Beck data

Rents of warehouse space in the Gdańsk Metropolitan Area range from €3 per sqm to €6 per sqm. New warehouse space is relatively inexpensive in comparison with other Polish cities, e.g. in Poznań between €4 and €9, in Szczecin €6 to €9 and in Wrocław from €4 to €7 per sqm/month. Prices for new warehouse space are also lower than in other major Polish cities, ranging between €257 and €411, while in Poznań, for example, prices vary from €450 and €706 and in Wrocław from €334 to €565.

4



4.3. Real estate for sale, prices in the communes of the Gdańsk Metropolitan Area

Communes of the Gdańsk Metropolitan Area currently offer for sale about 8,900 ha of state-owned property. Most of the property for sale can be found in the Gdańsk area, with a significantly smaller offer in Gdynia, Sopot and Wejherowo. Privately owned land is also available, with relative majority of the offer located in Gdańsk.



Minimum prices range from €13 per sqm in Gdańsk and Kosakowo to €231 in Sopot. Up-to-date information on real estate assigned for industrial investment can be found on the web page of the Pomerania Development Agency - www.arp.gda.pl.



5. ECONOMIC POTENTIAL OF THE GDAŃSK METROPOLITAN AREA

5.1. Economic condition of the Gdańsk Metropolitan Area

The Gdańsk Metropolitan Area is comparable with other metropolises of Central and Eastern Europe in per capita GDP. Nevertheless, despite strong growth dynamics this economic indicator is lower than among the countries of Western Europe. The central region of the Gdańsk Metropolitan Area, namely the Tri-City of Gdańsk, Sopot and Gdynia, has the strongest and most developed economy, its per capita GDP being about 40% higher than the Polish national average.

Table 5.1. Regional GDP per capita in 2004 -comparison with selected European cities (in €)

City	GDP per capita
Łódź	6122,4
Gdańsk – Sopot – Gdynia	7025,0
Wrocław	7368,2
Kraków	7544,6
Vilnius	6828,4
Greater London	18 587,6
Berlin	23 205,4
Madrid	24 583,5
Inner London	64 086,8

Source: Own research based on Eurostat data

The fact that 50% of the region's value-added is generated by service sector companies (commerce, hotels, restaurants, financial services, transport, real estate and business services) indicates the modern character of the economy of Pomorskie.

Pomorskie Voivodeship stands out among the remaining 15 voivodeships in having the highest export dynamics in the country. The region also characterised by a high average disposable income per capita - the second highest nationwide.

Further proof of the competitive edge of Pomorskie Voivodeship and the Gdańsk Metropolitan Area is the size of per capita industrial production, which places the voivodeship in the fourth position in Poland.

Dynamic growth and modern character of the economy of the Gdańsk Metropolitan Area are further confirmed by its employment structure which closely resembles one found in highly developed economies. The highest number of employed, about 37%, can be found in the services sector with the average for Poland being 27%. In addition, the Gdańsk Metropolitan Area also has a low percentage of individuals employed in agriculture - just over 8%, in contrast to the national average of 22%.

Table 5.2. The structure of employment in the Gdańsk Metropolitan Area, Pomorskie Voivodeship and Poland in 2004

Sector	The Metropolis	Pomorskie Region	Poland
Agricultural Sector	8,2%	12,2%	21,9%
Industrial Sector	29,4%	31,3%	29,2%
Services Sector– market services	37,1%	31,5%	26,9%
Services Sector– non-market services	25,3%	25,0%	22,0%

Source: Own research based on Central Statistical Office (GUS) data

Economic potential of the Gdańsk Metropolitan Area is also illustrated by substantial growth in work productivity. In the period from 2000 to 2004, productivity measured as industrial production per capita had grown by nearly 44%.

Investments in Pomorskie Voivodeship are among the highest in the north of Poland. In 2004, the value of the investments reached the level of €1.8 billion, being on average 50% higher than in the remaining regions of northern Poland.

Pomorskie Voivodeship has the highest concentration of EU funds contracted within the Integrated Regional Operational Programme among all Polish voivodeships.

The following are among the most important investments of the Gdańsk Metropolitan Area receiving co-financing from EU funds:

- Upgrading of road infrastructure

- Construction of the W-Z Route in Gdańsk, which will connect the centre of the city and the port with the Tri-City Ring Road, as well as with roads to Szczecin and ultimately the A-1 Motorway,
- Redevelopment of Marynarki Polskiej Street in Gdańsk, the main link of the communication channel to the Maritime Port in Gdańsk,
- Improvement of road access to the Port of Gdańsk,
- Development of road access to the city and the Port of Gdynia - Kwiatkowskiego Highway and Wisniewskiego Street,
- Construction of infrastructure for better access to Przemysłowe Quay in the Port of Gdańsk,
- Improvement of access to the Port Duty Free Zone in the Port of Gdańsk,
- Extension of quay and road infrastructure at the Westerplatte Ferry Terminal;

- Ecological investments

- Gdańsk sewage-water project. The key aim of the project consists of improvement and protection of the natural environment, cleanness of water and soil, upgrade of communal water-sewage management to Polish and EU environmental standards,
- Building of a waste utilisation plant in Gdynia,
- Protection of the Puck Bay, waters of the Baltic Sea and the central subterranean water tank by construction of a water mains system in Reda,
- Construction of a sanitary sewage system in Rumia's Szmelta district;

- Investment in recreation and entertainment

- Building a sports and performance hall at the border of Gdańsk and Sopot,
- Development of the centre of Sopot – construction of a hotel, spa, shopping centre, office/ parking complex, underground tunnel,
- Building a sports and performance hall in Gdynia,
- Development of tourism around the Bay of Gdańsk financed by the local self-governments of Gdynia, Hel, Jastarnia, Kosakowo, Puck and Władysławowo,
- Expansion of Gdańsk marina into a National Sailing Centre,
- Construction of a Gdańsk educational and recreational centre – the HEWELIANUM Centre;

- IT investments

- Pomorskie Science and Technology Park in Gdynia,
- e-powiat – development of electronic public services in Wejherowo county,
- e-Gdańsk – a European metropolis on-line,
- introduction of electronic signature and document circulation in the Pomorskie Voivodeship Office; 'ELEDOPIS',
- e-Sopot – a friendly commune programme,
- an integrated IT/telecommunications system for supporting emergency operations in Wejherowo County,
- Building an integrated IT system for the City Authorities of Pruszcz Gdański.

Pomorskie Voivodeship is characterised by a higher than average level of investment expenditure per capita on environmental protection, amounting to €38.

5.2. Economic engines of the Gdańsk Metropolitan Area

The Gdańsk Metropolitan Area is home to head offices of 16 companies ranking among the 500 largest in Poland in terms of sales earnings.

Table 5.3.
Largest companies in the Gdańsk Metropolitan Area in terms of sales earnings

Company's name	Income (in thousands Euro)	Description
Grupa Lotos S.A., Gdańsk	2 479 813	Second largest fuel company in Poland
Energa Koncern Energetyczny S.A., Gdańsk	1 310 519	Largest energy distributor in Poland, supporting 2.7 mln customers in north and central Poland
Grupa Prokom Software S.A., Gdynia	473 909	Biggest IT company in Poland. First Polish company certified in terms of software quality provision
Flextronics International Poland Sp. z o.o., Tczew	443 997	The company is part of US concern Flextronics listed on NASDAQ. It offers comprehensive products for telecommunication infrastructure
International Paper- Kwidzyn S.A.*	440 583	Largest paper industry company in Central and Eastern Europe. Leading producer of cellulose and paper for photocopying, offset, newspapers as well as coated cardboard and envelopes
GE Money Bank S.A., Gdańsk	417 293	Part of GE Electric. One of the largest banks in Poland focused on consumer loans and mortgages.
Gdynia Shipyard S.A., Gdynia	410 897	Largest shipyard in Europe in terms of production. It has its own Design Department cooperating with the Gdańsk University of Technology and Ship Design and Research Centre
Grupa Stocznia Remontowa S.A., Gdańsk [Repair Shipyard Group S.A.]	309 374	Largest Polish repair shipyard. According to the ranking of the best and biggest repair shipyards by a specialist magazine Drydock, - "Remontowa S.A." - is among three best shipyards in Europe and the top five in the world.
STU Ergo Hestia S.A., Sopot	286 791	Insurance company with headquarters in Sopot. The company belongs to the ERGO Group
Jabil Circuit Poland Sp. z o.o., Kwidzyn*	248 264	Part of Jabil Circuit INC., the world leader in Electronic Manufacturing Services (EMS). The company offers innovative solutions in design, production and post-production services for the electronics industry.
Polpharma S.A., Starogard Gdański*	224 984	Largest producer of generic drugs and pharmaceutical substances. The company, based in Starogard Gdański, created one of the biggest R&D centres in Central and Eastern Europe. Its new dry mould department is one of the largest and most modern drug production plants in Europe.

Company's name	Income (in thousands Euro)	Description
LPP S.A. GK, Gdańsk	176 307	Designer and producer of clothing. Designs are prepared at its headquarters in Gdańsk. Production is commissioned to factories in the Far East. Orders are carried out by the same manufacturers who produce for other world famous clothing companies. Currently, the company operates on 7 foreign markets and has 62 shops.
Elnord S.A., Gdańsk	175 363	Electrical power trading company sells and an agent in selling of electrical power. Active at the largest commodity exchange in Europe - the German EFX.
Elektrociepłowni Wybrzeże S.A., Gdańsk	120 788	Largest producer of heat and electricity in Pomorskie Voivodeship. Main investors in the company are E.D.F. International and G.D.F. International – European leaders in the energy sector.
Polnord S.A. GK, Gdańsk	102 142	One of largest construction companies with Polish capital. Specialises in turn-key large-scale industry and shopping centre projects.
Multimedia Polska S.A. GK, Gdynia	91 443	First operator commercially supplying:-broad-band Internet – in 2001 -package service Triple Play (3 in 1), cable TV, Internet and phone services – in 2004-digital TV services (IPTV) – in 2006

*- in proximity to the Gdańsk Metropolitan Area

Source: Own research based on the Rzeczpospolita Ranking- 26.04.2006

Development of the Gdańsk Metropolitan Area is stimulated by a large number of other companies, whose activities are particularly significant for the region.

IT and electronics industry

Dynamic growth in foreign investment in the sectors of IT and electronics is due largely to the very strong position of the technical universities of the Gdańsk Metropolitan Area, as well as the extensive employment base of local IT companies (e.g. Prokom Software SA in Gdynia)

Company	Selected investors / Capital origin
Prokom Software S.A., Gdynia	Poland
Young Digital Planet S.A., Gdańsk	Sanoma WSOY Finland
Intel Technology Poland Sp. z o.o., Gdańsk	Intel USA
Philips CEI Sp. z o.o., Kwidzyn	Philips the Netherlands
Compuware Sp. z o.o., Gdańsk	Compuware USA
Lufthansa Systems Poland Sp. z o.o., Gdańsk	Lufthansa Germany
Gemplus Pologne Sp. z o.o., Tczew	Gemplus France
Moeller Electric Sp. z o.o., Gdańsk	Moeller Germany
Hubner + Suhner Sp. z o.o., Tczew	Hubner + Suhner Switzerland
Molex Premise Networks Sp. z o.o., Rokitki	Molex Premise Networks USA
All Tech Sp. z o.o., Kartoszyno	All Tech USA

Maritime logistics sector

The Gdańsk Metropolitan Area is undergoing exceptionally dynamic growth in the area of communication infrastructure. In recent years, Gdynia and Gdańsk have been very successful at attracting substantial foreign investments in their ports. This, in turn, has paved the way to significant increases in trans-shipment, as well as being an incentive for investing into logistics centres and road & railway communication systems (initiated by the construction of the A-1 Motorway connecting the Gdańsk Metropolitan Area with the south of Poland).

Company	Selected investors / Capital origin
Zarząd Morskiego Portu Gdańsk S.A.	Poland
Zarząd Morskiego Portu Gdynia S.A.	Poland
Baltic Container Terminal Sp. z o.o., Gdynia	ICTS Philipines
Gdynia Container Terminal Sp. z o.o.	Hutchison Port Holdings Hong Kong
Deepwater Container Terminal Gdańsk S.A.	UK
Chipolbrot - Chinese-Polish Joint Stock Shipping Company	China
Stena Line Polska Sp. z o.o., Gdynia	Stena Line Sweden

Industry

Foreign investors have shown considerable involvement in the industrial sector. Large majority of them benefit directly from the opportunities offered by the robust Polish market of 38 million people. Export is often conducted within internal specialisations of capital groups.

Company	Selected investors / Capital origin
International Paper Kwidzyn S.A.	International Paper USA
Johann A. Krause Polska Sp. z o.o., Gdańsk	ThyssenKrupp Germany
Suruga Polska Sp. z o.o.	Suruga Seiki Japan
Amhil Europa Sp. z o.o., Kartoszyno	Amhil Enterprises Canada
Fabryka Plastików Pomierania Sp. z o.o., Kwidzyn	Plastivaloire France
Lemahieu Polska Sp. z o.o., Kwidzyn	Lemahieu Belgium
Federal-Mogul BIMET S.A., Gdańsk	Federal Mogul USA
Franke Gastopol Sp. z o.o., Gdynia	Franke Germany
MBF Sp. z o.o., Tczew	Belgium
Knauf Pack Sp. z o.o., Kwidzyn	Knauf SNC France
Nefab Packaging Poland Sp. z o.o., Tczew	Nefab Sweden
Tapflo Sp. z o.o., Tczew	Tapflo Sweden
GFM KLOSE Sp. z o.o., Gościcino	Klose Kollektion Germany
Polcova Sp. Z o.o., Wejherowo	Spain
Pipelife Sp. z o.o., Kartoszyno	Wienerberger Austria
Dellner Couplers Sp. z o.o., Gdynia	Dellner Couplers Sweden
KAPENA S.A., Słupsk	CACCIAMALI Italy
Damen Shipyards Gdynia S.A.	Damen Shipyards Group the Netherlands
Berendsen Textil Service Sp. z o.o.	Sophus Berendsen Denmark
Tekosom Poland Sp. z o.o.	Tekosom Svenska Sweden
Kappa Gdańsk Sp. z o.o., Pruszcz Gdański	Kappa Packaging the Netherlands
Fabryka Materaców Relaks Sp. z o.o., Chojnice	Germany

Food processing

Food processing industry, which has a significant presence of foreign capital, maintains a traditionally strong position in the voivodeship. Foreign capital is present both in plant, as well as, animal farming production. Fish processing industry is of equally importance to the local economy.

Company	Selected investors / Capital origin
Farm Frites Poland Sp. z o.o., Łębork	Farm Frites, Aviko the Netherlands
Coca-Cola Sp. z o.o., Gdynia	Coca-Cola Ltd USA
Dr Oetker Sp. z o.o., Gdańsk	Dr. Oetker Germany
Glencore Polska Sp. z o.o., Gdańsk	Glencore International Switzerland
Baltic Malt Sp. z o.o., Gdańsk	Friedrich Weissheimer Malzfabrik Germany
Prime Food Sp. z o.o., Przechlewo	Denmark
Poldanor S.A., Przechlewo	Denmark
Rieber & Søn Group Sp. z o.o., Gniewino	Norway
Tan- Viet International Ltd Sp. z o.o., Gdańsk	Vietnam
Cafe Sati Polska Sp. z o.o., Kwidzyn	Cafe Sati France
Gdańskie Młyny i Spichlerze Sp. z o.o. Dr. Cordesmeier Sp. z o.o., Gdańsk	Dr. Cordesmeier Germany

Communal services – energy, water, heat

Company	Selected investors / Capital origin
Saur Neptun Gdańsk S.A.	Saur France
Bałyk-Gaz Sp. z o.o., Rumia	Rheingas, Westfalen AG Germany
Dalkia Termika Sp. z o.o., Sopot	Dalkia France
Therminvest Sp. z o.o., Gdańsk	E.ON Ruhrgas International Germany

Construction industry

Recent, dynamic growth in the construction sector has been fuelled both by the general economic upturn, as well as the availability of EU funds, which have contributed to numerous new infrastructure investments.

Company	Selected investors / Capital origin
GPRD SKANSKA S.A., Gdańsk	SKANSKA Sweden
Hydrobudowa S.A., Gdańsk	NCC Sweden
Saint-Gobain Weber Terranova Sp. z o.o., Gdynia	Saint-Gobain, France
LSMW Sp. z o.o. Oddział w Polsce, Gdańsk	M+W Zander Germany
Hempel Poland Sp. z o.o., Gdańsk	Hempel Denmark
NDI S.A., Sopot	Poland
Invest Komfort S.A., Gdynia	Poland
Grupa Inwestycyjna HOSSA S.A., Gdynia	Poland
Mega S.A., Gdynia	Poland
Przedsiębiorstwo Budowlane Inpro Sp. z o.o., Gdańsk	Poland
BE&K Europe Sp. z o.o., Kwidzyn	BE&K USA

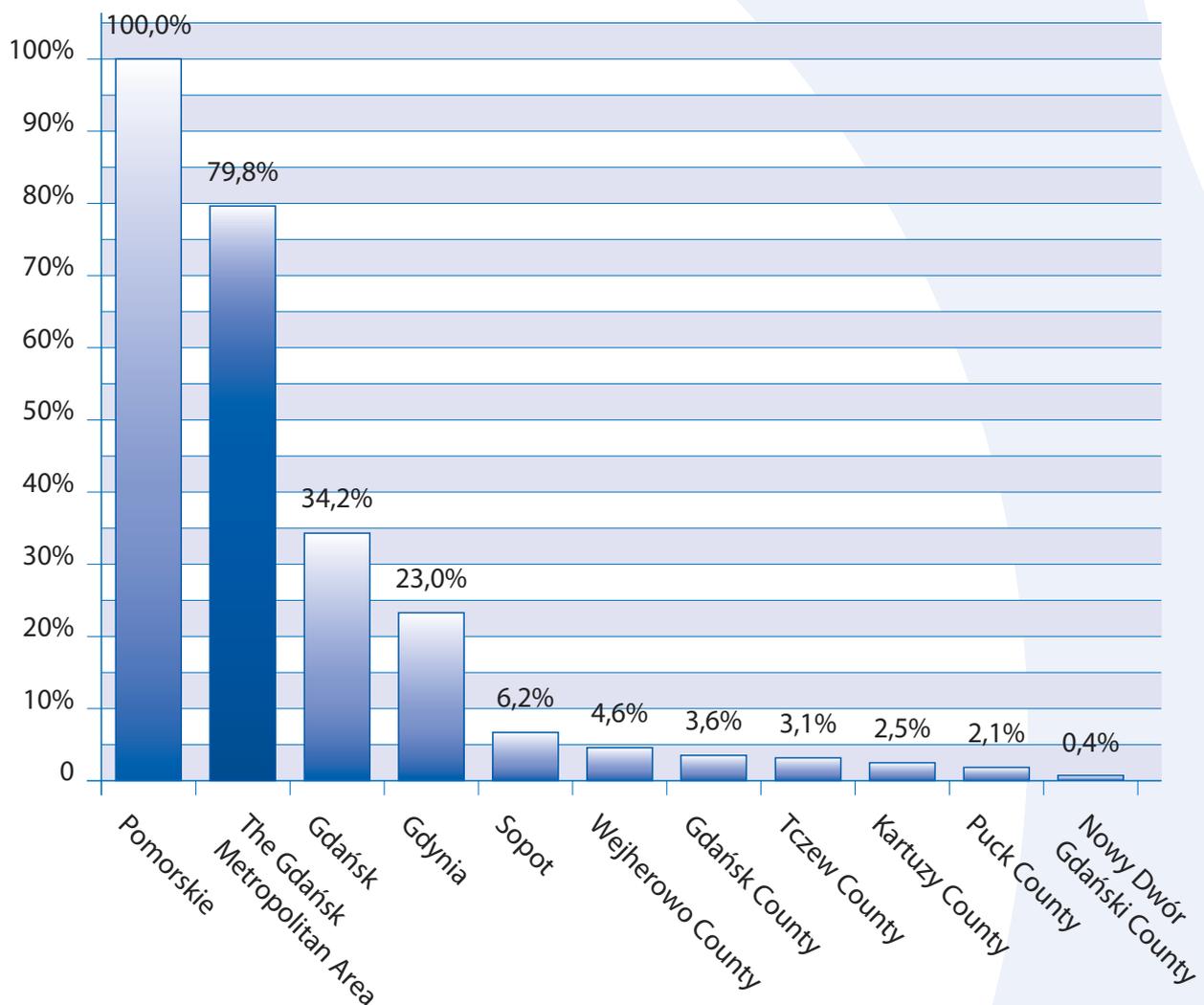
The innovative and competitive character of the economy of the Gdańsk Metropolitan Area is illustrated by the dynamic development of clusters - interconnected companies simultaneously competing and cooperating with each other. The following clusters are beginning to grow in the area:

- ICT branches – Information Communication Technology (automation and steering, television equipment production),
- Fishing sector (fishing and fish processing),
- Tourism,
- Timber – furniture industry,
- Transport and transshipment industry,
- Shipbuilding industry,
- Leather and leather goods production (including footwear and clothing),
- Metallurgical industry.

Over 3,500 foreign capital companies operate in Pomorskie Voivodeship, giving it the sixth position in the country and indicating great potential for future investments.

Commercial companies with foreign capital are located mainly in Gdańsk, Gdynia and Sopot.

Graph 5.1. The quantitative structure of commercial companies with foreign capital in the Gdańsk Metropolitan Area in 2006



Source: Own research based on the data of the Gdańsk Statistics Office

Key foreign investors come from the Netherlands (28% of foreign investment) and Germany (27%). Additionally, there are investors from France (10%), Sweden (7%), Denmark (7%) the UK (4%) and the USA (3%).

5.3. Confidence in future-orientated branches

The following sectors are priorities for the Gdańsk Metropolitan Area:

- hi-tech,
- IT,
- banking, finance and accounting services,
- maritime logistics
- recreation and entertainment,
- call centres.

Hi-tech sector

The hi-tech sector in the Gdańsk Metropolitan Area is experiencing dynamic growth. The sector includes production of computers, office equipment, radios, television sets and communication equipment, as well as pharmaceuticals, chemicals and vegetal substances. There are already more than 100 hi-tech companies present in the area, specialising in:

- Industrial automation;
- Electronics and telecommunication;
- Biotechnology;
- Cosmetics and personal care products.

Listed below are several hi-tech companies that have located their production in the Gdańsk Metropolitan Area:

- OCEANIC - producer of AA-brand cosmetics located in Sopot. Its products are sold in several countries (USA, Canada, South Africa, Germany, Norway and others),
- Pharmaceuticals Laboratory FARMIX - specialising in the production of creams,
- biotechnology;
- Ziaja Ltd. Zakład Produkcji Leków Sp. z o.o. in Gdańsk [Drug Production Plant Ltd] - producer of medications based on natural ingredients,
- DGT Sp. z o.o. - specialising in providing complex telecommunication solutions,
- Vector Sp. z o.o. - European leader in designing, producing and integrating telecommunication and television systems,
- EURx Sp. z o.o., - specialising in production and sale of enzymes, markers and other products utilised in genetic engineering and modern medical diagnostics.

The sector receives strong support from higher education centres located in the Gdańsk Metropolitan Area.

IT sector

Information technology is also one of the most dynamically developing sectors in the Gdańsk Metropolitan Area. There are 1,387 IT companies operating in the area, active in the fields of IT systems integration software, multimedia software, computer hardware production and Internet services.

Several international IT companies are located in the Pomerania Special Economic Zone in Tczew:

- French Gemplus Pologne Sp. z o.o., the largest producer of magnetic card readers in the world,
- The US concern Flextronics International Poland Sp. z o.o. quoted on NASDAQ, offering complex telecommunication infrastructure products, the company currently employs in Poland 2,600 workers.

The largest Polish IT company, Prokom Software SA, has its headquarters in Gdynia. Intel, the world's largest producer of microprocessors, has opened in Gdańsk a research and development centre - Intel Technology Poland Sp. z o.o. It is one of Intel's largest R&D laboratories in Europe. During a meeting in Gdańsk in April 2005, Craig Barret - the Chairman of Intel's Supervisory Board, stated that employment at the R&D centre, already in its seventh year of operations in Poland, was going to double by 2009. By that time, the laboratory will be employing 500 people.

Young Digital Planet SA - global leader in the production of interactive, language instruction software, is also located in the Gdańsk Metropolitan Area.

Foreign IT companies cooperate with engineers and IT specialists who make the Gdańsk Metropolitan Area their home, with specialised engineering professionals provided mostly by the Gdańsk University of Technology.

Financial services

The Gdańsk Metropolitan Area is the financial centre of the north of Poland. There are 400 institutions and branches of foreign and Polish banks out of the total of 608 present in the entire voivodeship, which operate in the Gdańsk Metropolitan Area. Among them one will find the GE Money Bank SA, part of GE Electric, which located its headquarters in Gdańsk and the Nordea Bank Polska SA, owned by the Scandinavian financial holding Nordea with the head office in Gdynia.

Recently, several other institutions have opened their branches and offices in the Gdańsk Metropolitan Area, namely Handelsbanken, Raiffeisen, Citifinancial, Santander and Nykredit.

Apart from the headquarters of two banks in Gdynia and Gdańsk, the Domestic Cashier Office of SKOK Credit Unions is also headquartered in the Tri-City - in Sopot. Ergo Hestia SA, owned by Ergo Group - the second largest company on the German insurance market - has located its headquarters in the Gdańsk Metropolitan Area. The owner of Ergo Group is the world's largest re-insurer, the Munich-based company, Munich Re. The headquarters of Best SA, the largest Polish debt collection company quoted on the Warsaw Stock Exchange, are located in Gdynia. Best SA has created one of the first securitisation funds in Poland - the Best I Non-standard Closed-End Securities Investment Fund. Gdańsk is also home to the head office of Masterlease Poland - the leader of the Polish full service leasing market. The investor in Masterlease Poland is the international financial concern - GMAC Financial Services - which in 2001 absorbed into its structures two companies active in the field of leasing means of transport, long-term lease and car fleet management - Prime Car Management SA and Futura Leasing SA from Gdańsk.

Competence centres

In June 2006, Reuters selected the Gdańsk Metropolitan Area for the location of its data management centre. According to Reuters, Gdańsk was best fit to the business needs of the company. The investor was impressed by the highly professional local workforce, business-friendly atmosphere and infrastructure, as well as the support of Gdańsk municipal authorities.

Gdańsk airport is also a major cargo port. The period of 1991-2005 had seen a twelve-fold increase in cargo freight, reaching 3,458 tons. The airport has cargo connections with Berlin, Budapest, Frankfurt, Hamburg, Copenhagen, Kaunas, Malmö and Warszawa.

Road connections

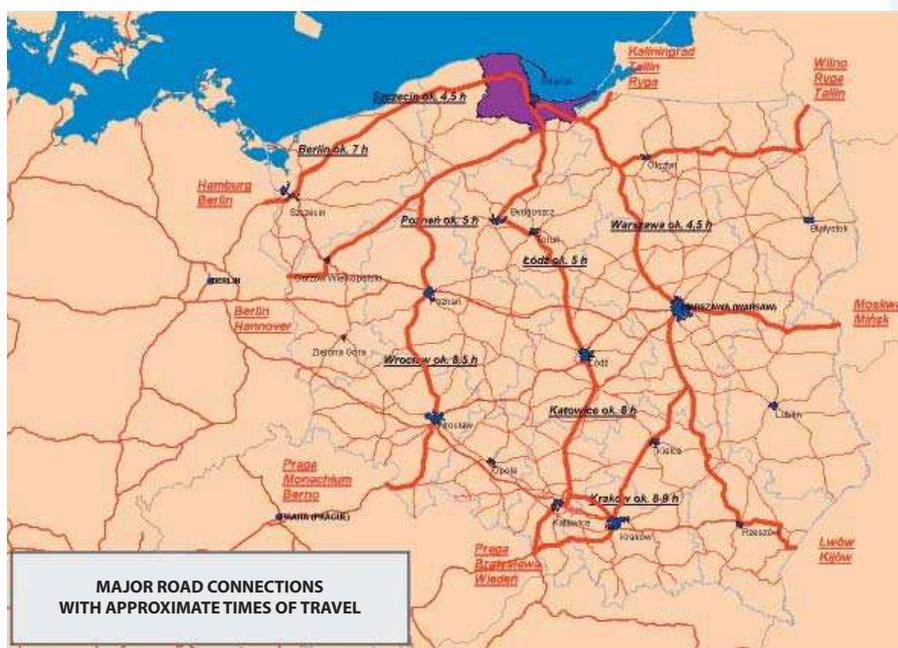
There is a number of international roads intersecting at the Gdańsk Metropolitan Area:

- Highway No. 6, which connects the Gdańsk Metropolitan Area with Szczecin and further on to Berlin,
- Highway No. 7, connecting the Gdańsk Metropolitan Area with Warszawa and further on with Slovakia and Hungary,
- Highway No. 1, providing connection between the Gdańsk Metropolitan Area, the Czech border and southern Germany. Highway No. 1 is a part of the so-called "Corridor VI," an international transport passage connecting the regions of Northern and Southern Europe – from Scandinavia via Poland, Central Europe, the Balkans and Turkey to the Near East. The development of the VI Corridor was also provided for in the European TINA programme (Transport Infrastructure Needs Assessment), aiming to integrate the transport systems of the 11 Central and Eastern European countries with the 'old' EU-15 Member States. This is a priority investment for the Gdańsk Metropolitan Area.

The initiated construction of the A-1 Motorway, connecting the seaports of Tri-City with Upper Silesia is an investment of strategic importance to the Gdańsk Metropolitan Area.



Graph 5.3. Major road connections between the Gdańsk Metropolitan Area and other Polish cities



Sea transport

The Gdańsk Metropolitan Area has direct ferry connections with the capital of Sweden. The ferry m/f Scandinavia connects Gdańsk to Nynäshamn, located 40 minutes away by train or car from Stockholm. The voyage lasts 18 hours. The m/f Scandinavia has a carrying capacity of 1,808 passengers. Among its facilities is a conference room and cinema with 204 seats. Both are equipped with modern audio-visual equipment. The Gdańsk ferry terminal can be conveniently accessed from the city centre (about 20-minute drive from the Old Town). More information is available at www.polferries.pl.

It is also possible to travel by ferry from the Gdańsk Metropolitan Area to the south of Sweden. StenaLine offers its services on the Gdynia – Karlskrona route. The ferries to Karlskrona leave from Gdynia twice a day. StenaLine provides comfortable ferries, Stena Baltica and Stena Nordica, able to carry 400 cars and 100 trucks. The trip lasts under 10 hours. For more information see www.stenaline.pl

The sea cargo shipment network is well developed. The ports of Gdańsk and Gdynia run regular shipping connections with dozens of ports worldwide. Container, general cargo and RO-RO ships (cargo of cars) sail from Gdańsk and Gdynia to the majority of large ports all over the world.



Every week ships leave from Gdańsk for:

- Antwerp in Belgium,
- Amsterdam and Rotterdam in the Netherlands,
- Klaipėda in Lithuania,
- Bremerhaven and Hamburg in Germany,
- St. Petersburg in Russia,
- Ipswich, Newcastle and Teesport in the UK.

Every month there are ships sailing from Gdańsk to:

- Bilbao in Spain,
- Barranquilla in Columbia,
- South Korea,
- Baltimore, Houston and New Orleans in the US,
- Trinidad and Tobago,
- Guanta in Venezuela.

Every week ships leave from Gdynia for (among others):

- Aarhus in Denmark,
- Antwerp in Belgium,
- Hamburg and Bremerhaven in Germany,
- Hull and Felixstowe in the UK,
- Klaipėda in Lithuania,
- St. Petersburg in Russia.

Every month there are ships sailing from Gdynia to:

- Buenos Aires in Argentina,
- Bridgetown in Barbados,
- Rio Grande, Santos, Rio de Janeiro, Recife and Parangua in Brazil,
- Talcahuano, San Antonio, Valparaiso, Arica and Antofagasta in Chile,
- Shanghai, Huangpu, Xingang and Dalian in China,
- Gyayaquil and Esmeraldas in Ecuador,
- Ashod and Hajfy in Israel,
- Warri and Lagos in Nigeria,
- San Juan in Puerto Rico,
- Kingston in Jamaica.



Railway connections

Four international railway lines pass through the Gdańsk Metropolitan Area, connecting it and its ports with the main cities and industrial centres of the country. Trains to Warszawa leave from the railway stations of Gdańsk, Gdynia and Sopot on average, during the day, every hour.

5

5.5. Business support infrastructure

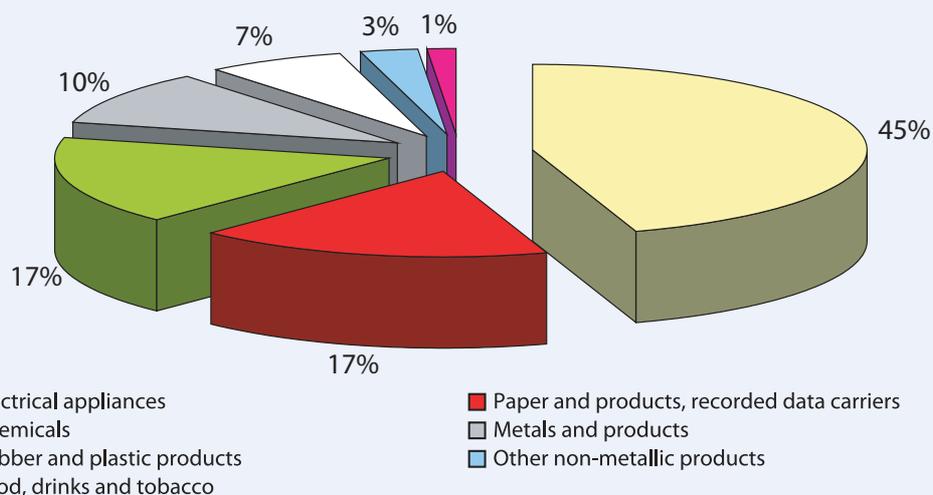
The authorities of the Gdańsk Metropolitan Area and NGOs create the local business support infrastructure. Business assistance is offered by the Pomerania Development Agency, chambers of commerce, the company managing the Pomeranian Special Economic Zone, fairs and exhibitions firms, financial institutions and law offices.

The Pomeranian Special Economic Zone

The Pomeranian Special Economic Zone (Pomorska Specjalna Strefa Ekonomiczna; www.strefa.gda.pl) is a separate area located within the territory of the Gdańsk Metropolitan Area. Business activity may be conducted there taking full advantage of its special, preferential regulations and conditions. The Pomeranian Special Economic Zone will function until November 2017. The managing company is Pomorska Specjalna Strefa Ekonomiczna Sp. z o.o. with its headquarters in Sopot.

The total value of capital invested in the territory of the Pomeranian Special Economic Zone reached €367 mln in 2005, with over 10,150 employed. Investments in the zone came mostly from companies in the electrical appliances sector (45% of total capital).

Graph 5.4.
Outlays per sector in the Pomeranian Special Economic Zone (as of the end of 2004)



Source: Own study based on: Special Economic Zones at the End of 2004, Ministry of Economy and Labour, Warszawa, March 2005

Major investors operating in the Pomeranian Special Economic Zone have in many cases selected areas of the zone located within the territory of the Gdańsk Metropolitan Area, i.e. in Gdańsk, Tczew and Żarnowiec.

Table 5.4. Major investors in the Pomeranian Special Economic Zone

Investor	Country of origin	Location in the zone	Sector - industry
All Tech Sp. z o.o.	USA	Żarnowiec	Electrotechnical
Amhil Europa Sp. z o.o.	Canada	Żarnowiec	Metal
Cartondruck Polska Sp. z o.o.	Germany	Tczew	Paper
Fabryka Plastików Pomorza Sp. z o.o.	France	Kwidzyn	Production of plastics
Flextronics International Poland Sp. z o.o.	USA	Tczew	Electronics
Gemplus Pologne Sp. z o.o.	France	Tczew	Electrotechnical
International Paper Kwidzyn S.A.	USA	Kwidzyn	Paper
Jabil Circuit Poland Sp. z o.o.	USA	Kwidzyn	Electrotechnical
Johann A. Krause Polska Sp. z o.o.	Germany	Gdańsk	Production of special purposes machines
Lemahieu Polska Sp. z o.o.	Belgium	Kwidzyn	Production of plastics
MBF Sp. z o.o.	Belgium	Tczew	Rubber
Molex Premise Networks Sp. z o.o.	USA	Tczew	Electrotechnical
Polinord Sp. z o.o.	Poland	Żarnowiec	Fish processing
Press-Glas S.A.	Poland	Tczew	Production of glass and window panes
Suruga Seiki Polska Sp. z o.o.	Japan	Gdańsk	Metal
Tapflo Sp. z o.o.	Sweden	Tczew	Production of pumps and air-compressors

Source: Pomorska Specjalna Strefa Ekonomiczna Sp. z o.o.

Starting business activity in the Pomeranian Special Economic Zone requires obtaining, through a tender or negotiations, of a permit issued by the zone administrator. Business enterprise investing in the zone can be granted investment concessions on the condition that:

- business activity in the zone is conducted according to the regulations outlined in the permit for the minimum period of 5 years,
- maintaining the ownership of property components connected with investment expenditures for the minimum period of 5 years.

The basic financial incentive for investors in the Pomeranian Special Economic Zone are tax exemptions. The investors can be granted regional public support in the form of tax exemptions, based on:

- **carrying out new investments** - if the minimum of €100,000 is invested within the zone, public support in the form of tax exemptions of up to 50% of the total investment value, or 40% if the investment is located in the area of the City of Gdańsk, may be granted. Public support is increased by 15% for small or medium sized enterprises. The condition of granting support, however, is that the participation of investor's own resources, understood as means that have not been obtained within the scope of granted aid, amounts to at least 25% of the total costs of the investment;
- **creation of new workplaces** - investor who creates new jobs within the area of the zone may be granted public support of 50% (or 40% in the City of Gdańsk) of 2-year labour costs for all new employees. The labour costs include gross salaries increased by all other obligatory payments connected with providing employment (about 20% of gross salary). The maximum amount of aid may be increased by 15% for small or medium size enterprises.

Pomerania Development Agency and Investor Service Centre

The role of the Pomerania Development Agency (www.arpg.gda.pl) consists of providing services to investors and supporting commercial missions, promoting the region in Poland and abroad, as well as advising in the process of investment offer preparation. The agency also plays an important function in granting support and business advice to small and medium sized enterprises.

Since 2004, the Investor Service Centre has operated within the framework of the Pomerania Development Agency - the regional partner of the Polish Information and Foreign Investment Agency. The Centre provides services to foreign enterprises interested in investment opportunities in Pomorskie Voivodeship. The main tasks of the Investor Service Centre are:

- promoting investment offers.
- providing information on the rules and regulations of conducting business activity in Poland, as well as on available investment incentives,
- supplying logistical services during visits,
- organising meetings between investors and partners.

Chambers of commerce, financial institutions, law offices, organisations of employers

There is a large number of institutions in the Gdańsk Metropolitan Area supporting investors and helping to create a favourable investment climate.

Professional services to investors are provided by:

- financial institutions
- law offices, legal advisors and notaries - The Regional Legal Council in Gdańsk (Okręgowa Rada Adwokacka w Gdańsku), The Regional Chamber of Legal Advisors in Gdańsk (Okręgowa Izba Radców Prawnych w Gdańsku), The Notarial Chamber in Gdańsk (Izba Notarialna w Gdańsku),
- chambers of commerce - The Pomeranian Chamber of Commerce and Trade (Pomorska Izba Przemysłowo-Handlowa), The Pomeranian Craft Chamber of Small and Medium Size Enterprises (Pomorska Izba Rzemieślnicza Małej i Średniej Przedsiębiorczości), The Regional Association of Commerce and Services (Wojewódzkie Zrzeszenie Handlu i Usług), The National Chamber of the Sea Economy (Krajowa Izba Gospodarki Morskiej), The Polish Chamber of Forwarding and Logistics (Polska Izba Spedycji i Logistyki),
- organisations of employers - The Gdańsk Employers Association (Gdański Związek Pracodawców), Gdańsk Business Club (Gdański Klub Biznesu), The Business Centre Club,
- warranty and loan funds - The Pomeranian Loan Fund in Gdańsk (Pomorski Fundusz Pożyczkowy sp. z o.o.), The Pomeranian Regional Credit Warranty Fund in Gdańsk (Pomorski Regionalny Fundusz Poręczeń Kredytowych sp. z o.o.), The Micro-Fund in Gdańsk (Fundusz Mikro),
- design and planning offices,
- customs chambers and warehouses,
- economic advisors,
- institutions holding fairs and exhibitions.

This diverse range of institutions is meant to provide domestic and foreign businesses with assistance in obtaining reliable information, ensuring effectiveness of their operations on the Polish market.

5.6. The Gdańsk Metropolitan Area – an attractive place for business meetings and conferences

Dozens of conferences and congresses are held annually in the Gdańsk Metropolitan Area, which has become an attractive meeting place for business people, due mostly to its continuously improving accommodation and conference infrastructure.

Further development of the conference base to meet the highest possible standards is planned for the upcoming years. The number of beds in four- star and five-star hotels in the Gdańsk Metropolitan Area is going to increase by about 400. In recent months the following major investments in hotel infrastructure have been initiated:

- **RADISSON SAS in the Old Town in Gdańsk** - At the latest by autumn 2007, the four star Rezydent Hotel in Gdańsk will be opened for guests. Part of the RADISSON SAS network, the hotel will offer 135 beds;
- **The Sopot SHERATON** - The Sheraton will change the tourist and business appearance of Sopot. In the summer 2008, the five star hotel will welcome its first guests. Its perfect location between the historic Grand Hotel and the 500-metre Sopot pier guarantee success of the investment. The hotel will offer 200 beds. Guests will be able to take advantage of the best spa in Poland, which will be an integral part of the hotel;
- **exclusive hotel complex in Gdynia** - In a few years, a hotel and recreation centre (including a water park) will be opened at one of Gdynia's most beautiful places. Its shape will resemble a transatlantic liner. The hotel complex will be located in immediate proximity to the Waterfront Boulevard, the Gdynia Redłowo beach and the Prokom tennis courts.

6. QUALITY OF LIFE IN THE GDAŃSK METROPOLITAN AREA

Creating the right conditions for a well-balanced, high quality of life is of the outmost priority for all the local self-government units of the Gdańsk Metropolitan Area. Considerable success had been achieved in implementing this prime, overall objective. The authorities have invested substantial amounts into environmental protection, cultural and health care development, as well as sports and recreation centres. Investments are also being carried out in the area of environmentally friendly transport infrastructure (railways, tramways, trolley-buses and bicycle paths), as well as e-communication. The future aim of the Gdańsk Metropolitan Area is to foster dynamic development of tourism, as the key sector of local economy. The improvement of the natural environment is aimed both at lowering ecosystem threat levels, as well as facilitating dynamic development of tourism – the branch of economy for which the Gdańsk Metropolitan Area has high hopes.

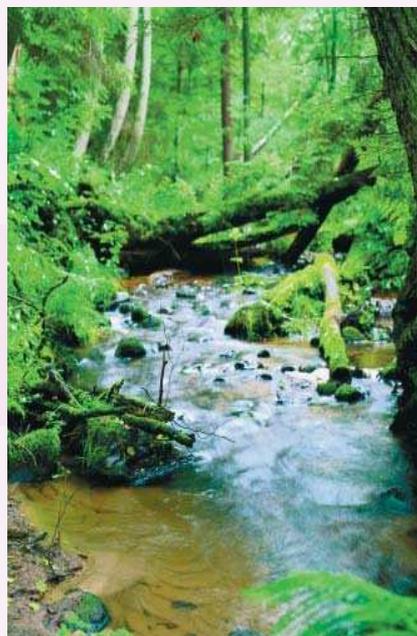
The above policy is based, among others, on the strategy of sustainable regional development - Gdańsk was the first Polish city to prepare such a strategy back in 1990. Since that time Gdańsk (joined in 1995 by Sopot and Pruszcz Gdański) has been in the forefront of European cities implementing the ideas and guidelines of "Local Agenda 21".

Gdynia was the first city in Poland to adopt the program of "Agenda 22". The program was prepared by Swedish handicap organizations on the basis of UN General Assembly Standard Rules. At its 23rd Conference, the Union of Baltic Cities approved and accepted for implementation the "Without Limits" social campaign which was initiated by Gdynia.

Numerous other factors contribute to the overall quality of life in the Gdańsk Metropolitan Area, resulting in improving the standard of living and level of satisfaction among both its inhabitants, as well as the scores of tourists.

6.1. Natural environment

The Gdańsk Metropolitan Area is situated on the Bay of Gdańsk. In the east it is surrounded by the delta of the largest Polish river, the Vistula (Wisła), and in the west and the south by the lakes of the Kashubian Lake District. The area enjoys some of the most diverse natural environments and landscapes in Poland. It is characterized by a varied topography and a considerable range of altitudes. The Hel Peninsula and the picturesque lagoon of the Bay of Puck define the area's northern boundary.



The central part of the Gdańsk Metropolitan Area is home to the Tri-City Landscape Park – a large forested complex with of approximately 20,000 hectares. The location of this great natural resource, directly at the borderline of a large urban conglomeration, is unique on the scale of entire Europe.

Due to its natural, historical and cultural importance, the entire area is under official protection. It is a perfect place to enjoy hiking, cycling and horse-back riding. One of its most valuable features is its distinctive post-glacial topography. Located in the central section of the park is one of the most beautiful zoos in Europe. Situated in the forest, among rolling, picturesque hills, it is a truly exceptional place, providing optimum conditions for its animals and great opportunities for family recreation.



The Gdańsk Metropolitan Area has an abundance of beautiful, sandy beaches. Thanks to its location on the Bay of Gdańsk, sea bathers and water sports fans can take advantage of several dozen kilometres of clean beach seafront.

Surroundings of the Gdańsk Metropolitan Area also include the Kashubian Lake District which is one of the largest in the entire Baltic Sea region. Its long stretches of post-glacial channel lakes, situated among undulating hills, form an exceptionally beautiful landscape.

There are several hundred gorgeous lakes in the lake district, the largest of them about 1,500 hectares in size. Grouping of the fourteen of the so-called Radunia Lakes, extending for the total distance of over 40 km, also create distinctive scenery. One of the most popular kayaking routes in this part of Poland passes thorough ten of the lakes.

6.2. Public transport

Local self-governments of the Gdańsk Metropolitan Area are currently investing much of their own funds, with a substantial participation also coming from the European Union, in the development and modernization of the road network and environmentally friendly public transportation.

The main transportation axis of the Gdańsk Metropolitan Area is the fast, city-railway, the so called SKM (Szybka Kolej Miejska), linking Wejherowo in the north, all the way down to Pruszcz Gdański in the south. It is the main means of public transport along the central north-south axis thanks to its speed and frequent service. The SKM carries about 30 million passengers a year.

The SKM is a reliable means of transportation during such events as, mass concerts and fairs, visits of top VIPs etc. when car traffic becomes very limited. The SKM timetables - and organization of traffic - are then tailored to the timing of a particular event.

Another important element of the transport system of the Gdańsk Metropolitan Area is the Tri-City Ring Road, running from Pruszcz Gdański to Gdynia. It allows for easy car access to strategic locations within the Gdańsk Metropolitan Area without having to pass through any of urban centres. The main advantage of this solution is that heavy vehicle transit by-passes the built-up area of the Tri-City.

Public transportation in the Gdańsk Metropolitan Area is undergoing progressive development. The Metropolitan Transport Association of the Bay of Gdańsk was established with the specific goal of designing and providing optimally efficient and integrated public transport system covering the entire Gdańsk Metropolitan Area.

In all the cities of the Gdańsk Metropolitan Area much importance is also paid to the continuous development of bicycle infrastructure.



The bicycle is widely promoted not only in its recreational role, but also as a practical means of everyday transportation – being both environmentally friendly and convenient. Works on modernizing roads, intersections and other transport nodes include construction of accompanying bike paths. The total length of bicycle paths in the centre of the Gdańsk Metropolitan Area already amounts to over 100 kilometres.

6.3. Cultural activities and entertainment

The Gdańsk Metropolitan Area offers wonderful possibilities of participating in cultural life, its character shaped by the heritage of centuries of numerous, intertwining traditions. Cultural events and institutions, architectural monuments and the various initiatives of the art community all contribute to the unique spirit of the place.

6.3.1. Theatres

The Wybrzeże Theatre in Gdańsk – its stage tradition already extends over 200 years. The first play, inaugurating the stage, was performed here in 1801. The auditorium could at the time sit 1,600 spectators, a record number back then.

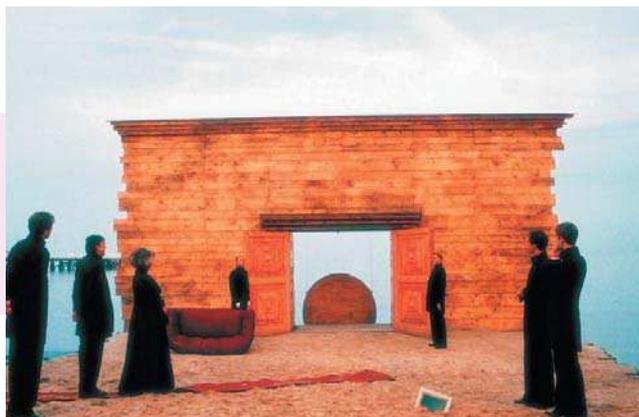
The Wybrzeże Theatre today has three separate stages - two in Gdańsk and one in Sopot. It regularly puts premieres of plays by the most outstanding Polish and European playwrights. The Wybrzeże Theatre hosts, among others, performances of the International Shakespeare Festival.

The Danuta Baduszkowa Musical Theatre in Gdynia is the cultural showpiece of the city. It is one of the best of its kind in Europe and has at its disposal the second biggest stage in Poland.

Activities of the artists of the Musical Theatre are not limited to own stage. Every year, during a tour of the Western Europe, around 50,000 spectators have a chance to see its performances. The Musical Theatre is well known in the history of the Polish theatre as the place of national premieres of musicals such as "Jesus Christ Superstar", "The Man from La Mancha", "Cabaret", "Les Miserables", "Scrooge" and "Hair". Its repertoire also includes modern classics such as "Evita" and "West Side Story", experimental performances, rock operas, drama pieces and baroque opera. Every year some of the most important cultural events, such as the Polish Feature Film Festival, the Ladies' Jazz Festival and the Shakespeare Festival, are hosted by the Musical Theatre.



The Witold Gombrowicz City Theatre in Gdynia the "artistic theatre for all," specializing in staging popular classics.



The theatre – besides the permanent stage in the centre of Gdynia – has a second site, exceptionally spectacular and romantic: the Summer Stage at the Gdynia-Orłowo beach, providing viewers with unique opportunity to experience theatrical arts in a natural beach setting. The City Theatre is also both the creator and the host of **The Modern Theatre Festival "R@PORT"**. The festival is an attempt to capture the changes observed in Polish and European theatre during the last decade. The changes which deal not just with the language of the theatre itself but first and foremost, reformulate its function and place in modern society. The festival has the character of a report on the theatrical achievements of contemporary playwrights from all over Europe. Its aim is to become an opinion-shaping institution, registering and systemizing trends and directions present in modern theatre.

The Agnieszka Osiecka Studio Theatre in Sopot established in 1989 by the ART 2000 Foundation. It provides a stage for young artists from various countries to co-operate on stage performances, popularize modern theatrical productions (mostly German) and promote Jewish culture. Its cyclical event "The Sopot Theatre Summer" was initiated by the Foundation in 1994.

The International Shakespeare Festival - event organised every year at the beginning of August by the Theatrum Gedanense Foundation to commemorate the arrival of English actors to Gdańsk in the 17th century. The history of the International Shakespeare Festival goes back to 1993, when the first Gdańsk Shakespeare Days were organised.

Since then, every August, the foundation stages the most interesting adaptations of Shakespeare's plays, both from Poland and abroad. The performances take place in all of the foremost theatres of Gdańsk, Gdynia and Sopot.



The Theatrum Gedanense Foundation is an initiative of culture and art enthusiasts. Its main goal is the reconstruction of the Elizabethan theatre building, which from the early 17th century had been part of the cultural landscape of Gdańsk for almost two centuries.

The Theatrum Gedanense Foundation has received international recognition, among its patrons one will find His Royal Majesty Charles, Prince of Wales; and the wife of the President of the United States, Laura Bush, who actively promotes the foundation in the USA.

6.3.2. Music in the Gdańsk Metropolitan Area

The Frederic Chopin Polish Baltic Philharmonic Hall is an extraordinary place. It is located in the complex of former power plant buildings dating back to the 19th century, which along with the Royal Granary of 1606, now the Royal Hotel, form the Gdańsk Music and Congress Centre on Ołowianka Island.



The heart of the Philharmonic is its Concert Hall, with almost 1000 seats, centrally placed stage modelled on a Greek amphitheatre and one of the largest symphonic pipe organs in Poland, which originally came from the Lausanne Cathedral. There is also the Chamber Hall with 180 seats, and the Amphitheatre on the Moltawa, designed for open air concerts which can also be viewed from across the waterway channel.

The Gdańsk Music and Congress Centre, with the new seat of the Polish Baltic Philharmonic Hall, is truly one of the most modern and interesting cultural centres in Poland.

The State Baltic Opera in Gdańsk opened in 1950, although the operatic traditions of Gdańsk reach back to the 17th century when the first opera performance in honour of the Queen of Poland, Ludwika Maria, was staged in Gdańsk.

The Baltic Opera has staged the works by Verdi, Puccini, Donizetti, Tchaikovski, Wagner and Strauss. Since the 1980s it has not only presented numerous performances abroad, but has also hosted the biggest opera and ballet stars in the world. The opera cooperates with European theatres. One of the most interesting examples of such cooperation is the long-term contract with the Ingolstadt Theatre from Germany, which resulted in the premiere of "Fidelio" the opera by Ludwig van Beethoven, prepared for the occasion of celebrating the Millennium Anniversary of Gdańsk.



The Polish Chamber Philharmonic Orchestra in Sopot conducted by Wojciech Rajski has been playing since 1982. Its over 20 musicians are artists of exceptional talent. The orchestra gives as many as 100 concerts a year, in Germany, France, Austria, Switzerland, Spain, Belgium, Holland, Sweden, Denmark, Luxemburg and England. It is invited on regular basis to the most renowned European festivals, including: Schleswig-Holstein Musik Festival, Festspiele Mecklenburg-Vorpommern, Rheingau Festival, The Prague Spring, Weilburger Schlosskonzerte, Festival van Vlaanderen and many others. It has recorded over 40 albums.

The Polish Chamber Philharmonic also has its own superb concert hall in Sopot, on the grounds of **Opera Leśna** (Open Air Theatre), next to the amphitheatre whose history reaches back to the beginning of the 20th century.

The Amphitheatre – is an open-air stage located in a forested valley characterized by perfect acoustics and beautiful natural surroundings. The Open Air Theatre (Opera Leśna) in Sopot is considered one of the most stunning, both visually and acoustically, open-air stages in Europe. Currently, the Opera's grounds cover impressive 4 hectares, with almost 4,400 spectator seats. Besides hosting the annual International Song Festivals, the Sopot stage is a venue for rock and blues concerts, as well as classical music concerts.

6.3.3. Museums

The National Museum in Gdańsk is the largest institution of its kind in the Gdańsk Metropolitan Area, containing a vast collection of historic art. The most precious medieval art exhibit in the museum is the triptych "The Last Judgement" by Hans Memling dating back to the second half of the 15th century. The museum contains collections of medieval Pomeranian and Western European sculpture, Dutch painting, and Flemish and Gdańsk 16th -17th century painting. Apart from the historic art collection, especially the Pomeranian and Gdańsk, the museum also hosts paintings by Polish artists, including the works by Piotr Michałowski, Stanisław Wyspiański and Jacek Malczewski.

As an interesting detail one may mention the branch of the National Museum in Będzin, where the **National Anthem Museum**, probably the only one of its kind in the world, is located. It is dedicated to the Dąbrowski Mazurka (Mazurek Dąbrowskiego) - the national anthem of Poland, composed by Józef Wybicki.

The Historical Museum of the City of Gdańsk takes care of the most precious Gdańsk monuments: the Main City Town Hall, the Artus Court and the Uphagen House, as well as places connected with the tragic history of Poland and Europe, such as Westerplatte, where the first shots of World War II were fired.

Gdańsk has been connected with amber for centuries, and in 2000 the city authorities established **the Amber Museum** - branch of the Historical Museum of the City of Gdańsk, where the history of amber, its trade routes and the prominent role of Gdańsk on the amber map of Europe are attractively presented.

Two museums documenting the marine history of Gdańsk and Gdynia are also worth visiting: **the Marine Museum in Gdańsk**, presenting Poland's and Gdańsk's early relationship with the sea, and **the Navy Museum in Gdynia**, with its particular exhibit, the destroyer ORP Błyskawica. The museum presents, among others, a rich exhibition of historical naval equipment, containing an impressive collection of naval weaponry and arms from the 16th century until modern times.



The Museum of the City of Gdynia holds interesting exhibitions related not only to the history of the city and Kashubian region, but also to the largest cultural events. Since September 2006, the Museum of the City of Gdynia and the Navy Museum have been located in the new building – the only Polish museum built from scratch in recent years.

In addition, in all the corners of the Gdańsk Metropolitan Area one is bound to come across museums and places of exhibition, presenting works and cultural heritage of the entire Pomorskie Voivodeship.

6.3.4. Cultural centres

The Gdańsk Metropolitan Area is a friendly place for all initiatives that stimulate interest in modern culture and allow for more active participation in its creation. Some of such initiatives are supported or patronized by the authorities or public institutions. Among them are famous centres and clubs such as Łaźnia, Plama, Winda, Wyspa and Żak.

The following cultural centres of the Gdańsk Metropolitan Area are developing particularly dynamically:

The Żak Club in Gdańsk one of the few truly legendary clubs in Poland, established by the students of Gdańsk in the 1950s. It is here that some of the most prominent Polish film directors, actors and musicians took their first artistic steps. Żak has a studio cinema, one of the best in Poland, with an ambitious repertoire, specializing in presenting diverse film genres and cinematographic movements, contemporary art movies and the history of cinema. In addition, the club is also home to a theatre stage, a music stage and a gallery promoting young Gdańsk artists.

SPATIF in Sopot another cult club, established at the end of the 1950s by Sopot artists. For almost 50 years it has been a meeting place for people of theatre and film, writers and poets. It hosts concerts, happenings and thematic events. Nearly all renowned representatives of Polish culture are connected with the SPATIF.

The Modern Art Centre 'Łaźnia' in Gdańsk located in the Lower Town, in the historical building of the City Baths dating back to the beginning of the 20th century. It conducts presentations of Polish and foreign modern art, video art and paratheatrical activities.

The Art Institute 'Wyspa' located on the grounds of the former Gdańsk Shipyard. The mission of the institute is to provide an intellectually and artistically stimulating function for the former shipyard area, contributing to the discussion of its historical role and connecting it with the achievements of independent art movements in Gdańsk, as well as modern innovative art practice.

The Baltic Sea Culture Centre (Nadbałtyckie Centrum Kultury) in Gdańsk cultural institution of the local self-government, established in 1992, promoting the culture of Pomorskie Voivodeship in Poland and abroad. One of the most interesting initiatives of The Baltic Sea Culture Centre was adapting the St. John's church, which was destroyed during the war, for cultural purposes. The St. John's Centre is a place where religious functions are combined with artistic activities – exhibitions, concerts and theatrical performances.

Well over 300 musical events of all kinds, styles and trends take place during the summer season in the Gdańsk Metropolitan Area.

6.3.5. Cultural events and festivals



The Saint Dominic's Fair in Gdańsk is an example of an event that for centuries has been successfully combining culture and commerce, it is the largest open-air event in Poland and one of the largest in Europe of its kind. The tradition of the fair goes back to the 13th century, when on the last Saturday of July numerous groups of German, French, English and even Spanish and Portuguese merchants arrived in Gdańsk. Several hundred ships with overseas goods called in at the port of Gdańsk, with actors and circus performers on board.



Today, every year in August, over 1,200 vendors, artists, artisans, collectors and antique lovers display their stands in the historical centre of the Old Town. Over its three weeks there are many cultural events taking place among an exceptional array of scenery. The fair's programme includes festivals, concerts, street parades, theatre performances and competitions. During the 1,500 hours of the artistic fair as many as 3,500 artists perform on seven stages.

The International Song Festival in Sopot *SOPOT FESTIVAL* - The idea of the festival originated with Władysław Szpilman, an outstanding pianist and composer, whose war-time experiences were told by Roman Polański in the film "The Pianist." The first Sopot festival took place in 1961 and for over 40 years has been held on the stage at Opera Leśna in Sopot.

Among the famous artists who have performed at the Sopot amphitheatre one may find Charles Aznavour, Jose Feliciano, Marillion, Jimmy Sommerville, Annie Lennox, Kim Wilde, ZZ Top, Beverly Craven, Al Bano & Romina Power, the Backstreet Boys, the Corrs, James Brown, Earth, Wind & Fire, Chris Rea, Goran Bregović, Whitney Houston, Lionel Richie, Bryan Adams, UB40, Zucchero, Sir Elton John, Garou and many others.

The Heineken Open'er Music Festival - Organised for the fifth time in Poland and for the fourth time in Gdynia, the festival is the biggest in Poland and one of the most interesting alternative music events in Central and Eastern Europe. Over a three day period, world famous hip-hop, electronic and rock music stars perform here, accompanied by theatre show events and club dance venues.

The GLOBALTICA World Culture Festival in Gdynia - The purpose of the festival is to present the achievements of contemporary artists: musicians, writers and photographers, who reach deep into the Baltic traditions, but also out beyond regional, national and even European borders.

Thematic days were held during the second edition of the event (in 2006): Lithuanian, Ukrainian, German and Polish. Meetings with writers, photographic exhibitions and performances of musicians from each given country were held in the clubs of Gdynia. The final concert of the star of the festival, the Capo Verde singer Cesaria Evora, took place amid seashore scenery, on Kościuszko Square in Gdynia, which is a landmark site known throughout the country.

Gdynia Summer Jazz Days. Gdynia is known in Poland as one of its "most jazzy cities." For many years the excellent **Gdynia Summer Jazz Days** jazz festival has been held here. In 2006, it took on a unique form with the "Ladies' Jazz Festival." The festival takes place in mid-July, hosting female jazz stars from all over the world. The concerts take place in the Musical Theatre in Gdynia and the festival has already been visited by stars such as, Patricia Barber, Ivo Mendes, Stacey Kent and the outstanding and internationally awarded Polish vocalist Anna Serafińska.

The Gdańsk Carillon Festival is the only music event of its kind in Poland. Only Gdańsk has two precious "carillon" (bell playing) sets, one at the Town Hall tower in the Old Town and the other at the St. Catherine church tower. There is only one other carillon in Poland – in Częstochowa at the Jasna Góra shrine. The festival provides an overview of the magnificent works of musical literature for carillon, from the baroque compositions of Johannes Sebastian Bach to the 20th century works of Arthur Rubinstein.

6.4. Sports and recreation in the Gdańsk Metropolitan Area

The Gdańsk Metropolitan Area is a place where one can practice virtually any sporting discipline – both on the recreational and the highest, professional level. Alongside beautiful and picturesque marinas, athletics stadiums, swimming pools and sports fields, where sports can be practiced in the summer season, the area also offers possibilities of active recreation in the winter season in its high quality sports halls and clubs and on delightfully situated ski runs, perfect for lovers of both downhill and cross-country skiing.

It is a perfect place for active recreation, so much needed to unwind after intensive work.

6.4.1. Sailing and diving

Due to its location on the Baltic Sea, most of the coastal cities of the Gdańsk Metropolitan Area focus strongly on water sports. New marinas are being built, marine sports events organized at the European Championship and World Championship levels and there are several dozen clubs for water sports' lovers.



Despite the fact that the waters of the Baltic Sea are not as transparent as the seas of Southern Europe diving is very popular here for many reasons. Thrill seekers will be happy to take advantage of expeditions to numerous wrecks resting at the bottom of the Baltic Sea, offered by diving clubs, as well as countless other attractions.



In the majority of the sailing centres, one can charter a yacht or catamaran and sail off for days or just rent a surfboard for a few hours.

The National Sailing Centre in Gdańsk is the biggest water sports centre in Poland. The centre is also the most modern and meets the highest global standards. The centre is able to organise international level regattas. It also organises sailing courses for children and young people and a several day cruises on the Baltic Sea.



The Sopot Sailing Club, active for over 20 years, is the largest windsurfing club in Poland. Its members include many European Champions, World Champions and Olympic athletes. The Sopot Sailing Club organises World and European Championships for seniors and juniors in the Olympic Mistral class and European Championships for seniors in the Raceboard Class.



The Gdynia Marina is one of the largest yacht ports in Poland, where as many as 200 yachts with a length of up to 20 metres can be moored. The Gdynia Marina was designed to meet the highest European standards. It has very accessible conditions for sailors: the marina's dock is lit up and has a sound system, a fuel station and many shops equipped with articles essential for all sea-faring folk to ensure ecological use of the port.

The expected fast development of water-based recreation and sports, particularly of boat tourism in the Gdańsk Metropolitan Area has led to plans to build new marinas, among others in Rewa (Kosakowo Commune) and in Sopot, and to develop the Gdynia Marina within the framework of the **SuPortNet II** - Sustainable Spatial Development Project with a Network of Ports for Boat Tourism Project, aimed at creation of sustainable spatial development through building a network of marinas and other developments.

6.4.2. Golf

There are three high class golf courses in the Gdańsk Metropolitan Area well fit to satisfy the needs of even the most demanding of golfers. The golf courses meet all the global standards. The golf course at Postołowo near Gdańsk was classified among the 50 best golf courses in Europe.



Postołowo Golf Club - an 18-hole course in the Master Class, with a tee length of 6,515 metres, a modern golf club building with restaurant, bar, café, golf shop and high class conference room. The course is situated in Postołowo, 20 km from Gdańsk.

Sierra Golf Club - 18-hole golf course of Master Class. It was designed by the world renowned Scotsman, Cameron Sinclair. The club offers two modern golf simulators, which make it possible to practice the game all year round, as well as a modern and luxurious club house. The course is situated in Pętkowice near Wejherowo.

Tokary Golf Club - 9-hole golf course, with a tee length of 2,931 metres. Situated in Tokary, 15 km from Gdańsk, it creates perfect conditions both for beginners and experienced players.

6.4.3. Tennis

Tennis is one of the most popular sporting disciplines in Poland. Tennis courts may be found throughout the Gdańsk Metropolitan Area, providing local residents with perfect conditions for practicing the game. However, it is without doubt Sopot has the richest tradition in this respect, with its tennis history reaching back to the end of the 19th century.

The tennis courts of the Sopot Tennis Club form the most beautifully situated complex of its kind in Poland. As many as 25 matches can be played here at the same time. Moreover, the club offers two modern halls with seven indoor courts, comfortable stands and a functional club building, where the Sopot Tennis Academy has its headquarters; health and beauty spa facilities and many other essential elements of essential infrastructure.

For 15 years the ATP Orange Prokom Open, the most important tennis tournament in Poland, has been organized on the courts of Sopot. For the last five years the Sopot tournament has been included in the regular calendar of the most prominent men's tournament, the ATP Tour.

It is on the courts of Sopot that one can watch tennis stars such as Arantxa Sanchez-Vicario, Conchita Martinez, Anke Huber, Juan Carlos Ferrero and Carlos Moya.

6.5. Wide access to information

The local self-governments of the Gdańsk Metropolitan Area are conducting intensive development of information access programmes. These include activities aimed at promoting access to the Internet (including wireless) and development of local government portals to make them more user-friendly.

Modules relating to city marketing, servicing of investors, and coordination of preventive and emergency measures in high risk situations form vital elements of the conducted e-government programmes. Gdańsk is the forerunner in creating many solutions connected with spatial information systems useful, for instance for investors seeking a good location for their businesses. Gdynia also has an Internet based presentation of offers for investors (for which it was awarded by the Union of Polish Cities and the "Rzeczpospolita" newspaper). In addition Gdynia has also received the Marshal of Pomorskie Voivodeship Award for its tourism promotion Internet website (www.gdynia.pl) which not only promotes the city itself, but also the entire Gdańsk Metropolitan Area and Pomorskie Voivodeship. It is noteworthy that the Gdynia website can be also be "read" by visually impaired persons.

In 2005, Gdańsk started implementing a more complex and long-term project called "E- Gdańsk – European Metropolis Online," which in addition to the administrative sector, also covers social and economic areas. It is aimed at providing local residents, business people, social organizations, institutions and tourists with access to information base and electronic services through IT applications.

In addition, one should stress that all the towns and communes of the Gdańsk Metropolitan Area have their own Internet portals, allowing for access to all the necessary information.

6.6. Health care in the Gdańsk Metropolitan Area

The Gdańsk Metropolitan Area has the highest number of specialized health care and prevention institutions in northern Poland. Fifteen hospitals and a broad range of specialised health services are located here.

As an example, one can give the University Research (Clinical) Centre in Gdańsk (with both basic and highly specialised clinics, such as allergology, dermatology and plastic surgery clinics) and the Tropical and Marine Medicine Centre in Gdynia. Other important public medical centres offering highly specialized services include the Sopot Rheumatological Hospital and the Sopot Spa, both offering rehabilitation therapy, health and beauty treatment, as well as cryostimulation.

There are also many high class private health care providers. Several of them (e.g. SWISSMED in Gdańsk and CLINICA MEDICA in Gdynia) are small, comfortable hospital clinics. Their achievements in the field of specialist therapies are confirmed not only by their market success, but also by accreditation and certificates attesting their highest quality. Both of them are the top of hospital rankings.

6.7. Unique sights of Pomorskie

Amber – The Gold of the North

The land encompassing present-day Gdańsk Metropolitan Area is a place where amber was mined, worked on and traded probably as early as around 5000 BC and it was here that the famous Amber Route to southern Europe began. Visitors can admire the most beautiful specimens of Baltic amber at the Amber Museum in Gdańsk or at the Inclusion Museum (insects embalmed in amber) in Gdynia. The largest amber fair in the world – the AMBERIF in Gdańsk – is held annually. One can also become a World Champion in amber ‘fishing’ by taking part in the one-of-a-kind competition held every year in the local village of Jantar.



The Royal Route in Gdańsk

The most representative part of the Old Town of Gdańsk is where the most beautiful architectural monuments the city can be found – the Town Hall, Artus Court, the row of 84 beautifully restored town houses and the Golden and Green Gates, where the Route runs its course. The most prominent citizens of the city built their town houses here. For centuries, the Route was the place where entourages of Polish Kings, distinguished guests and delegations paraded along.

The Royal Route is one of the most beautiful historical architectural complexes in northern Europe.



The Pier in Sopot

The longest wooden pier in Europe, measuring 511 metres. It is the most popular place for walking and recreation in Sopot. The land part of the pier, with its historical fountain, lighthouse with a viewing point and band shell, is the location for many musical, sporting and promotional events in the summer season. The wooden part of the pier which extends over water, includes, besides the main deck, the lower decks and the side deck, making it possible for passenger boats and yachts to moor here.



Kościuszko Square in Gdynia

A place visited by kings, presidents and admirals. It is here that important national and city celebrations, parades and dress parades take place, as do mass rock concerts. Prestigious sporting events also start and finish here. From the square, one can admire the many tall ships which every few years meet in Gdynia for reviews. Kościuszko Square is also home to the Gdynia Aquarium – with its hundreds of specimens of marine fauna and flora from all over the world, as well as the largest marina in Poland.



The Castle in Malbork

Malbork was once the capital of the State of the Order of the Teutonic Knights - from the end of the 13th century to the second half of the 15th century. It is the largest Gothic stronghold still standing in Europe and is considered the largest castle complex in the world. Many events, concerts and scientific conferences are organized on castle grounds. The most popular and most visited is the re-enactment of the Siege of Malbork, with its medieval craft fairs, street theatre, spectacular knight fighting shows and tournaments. In 1997, the Malbork Castle was put on the UNESCO World Heritage List.



POMORSKIE

VOIVODESHIP



Description

Pomorskie Voivodeship is located in the north of Poland on the southern coast of the Baltic Sea. It has approximately 2.2 mln inhabitants (5.7% of Poland's population), with an area of 18,293 km² (5.9% of the total area of the country). Pomorskie is the eighth largest among the sixteen voivodeships of Poland.

Pomorskie Voivodeship is a highly urbanised region (the 4th most urbanised in the country), with both the population (of about 1 mln inhabitants) and most companies concentrated in the area of the Gdańsk Metropolitan Area. Aside from Gdańsk, other major cities of the voivodeship include Gdynia, Sopot, Słupsk and Tczew.

The main economic sectors of Pomorskie Voivodeship include: maritime economy, farming and food sector (including fishery), chemicals industry, construction, furniture industry, electronics and IT industries, pharmaceuticals and biotechnology, as well as tourism and related services sectors.

Pomorskie Voivodeship has very good communications with the rest of the country and beyond. There is an international and national roads network connecting it with Southern Europe via Slovakia (E-75, E-77), with Eastern Europe via Kaliningrad (E-22) and with Western Europe via Germany (E-28). The commenced construction of A-1 highway, which will connect northern and southern Poland and further on with Southern Europe, is of vital significance in terms of the accessibility of the ports in Gdańsk and Gdynia. It is also worth noting that a substantial part of the EU funds granted to Pomorskie Voivodeship is being used to continue developing the quality of its road network.

Gdańsk's Lech Wałęsa International Airport offers direct connections to numerous European cities.



Regular ferry connections with Scandinavia enable both tourism and business exchange.

One of the main advantages of Pomorskie Voivodeship is the level of education of its residents. There are twenty-eight public and private universities in the region and thanks to this, employers do not have any difficulties locating well qualified staff. Besides universities, there are six scientific research institutes. It is also worth stressing that some of the higher education centres conduct instructions in foreign languages.

Pomorskie Voivodeship is an exceptionally culturally diverse area, both from the historical perspective and today. Its local history-rooted ethnic groups (e.g., the Kashubians and Kociewians) and multiple national minorities give the region its open, cosmopolitan character, manifesting itself also in the high level of international activity. There are 25 consulates present in Pomorskie Voivodeship (eight general consulates, fifteen honorary consulates and two consular agencies). The voivodeship is also home to the secretariats of the Union of the Baltic Cities, the Helcom and VASAB programmes and the BSSSC (Baltic Sea States Subregional Co-operation) which till recently had been headquartered here. Pomorskie Voivodeship is very active on the international arena. It cooperates with a number of regions in Germany (Schleswig-Holstein, Mecklenburg – Vorpommern, Mittelfranken (Bavaria), Sweden (Karlskrona, Kalmar, Blekinge), Denmark (Sealand), Finland (Turku), Norway (Akershus), Russia (Kaliningrad District), France (Limousin, Upper Normandy), the UK (Newcastle, Glasgow) and China (Shanghai). In addition, it plays an active role in international organisations and institutions, such as Baltic Sea States Subregional Cooperation, Committee of the Regions or Congress of Local and Regional Authorities of Europe. Pomorskie Voivodeship has a very active Regional Office in Brussels, acting together within the framework of the Association “Pomorskie in the EU” whose members include local self-governments, developmental agencies, business support institutions and universities.

Pomorskie Voivodeship is also an area with an unusually rich tourism and cultural offer. Visitors can enjoy their free time visiting its many historical sites, for example, admiring the Hanseatic Gdańsk, the Teutonic Knights castles of Malbork, the Cistercians’ Route and an abundance of historical Gothic structures. One can also take advantage of the gifts of nature, relaxing on the vast sandy seaside beaches, at the lakes, or in a more active way – by sailing made easy by numerous marinas, enjoying one of the best areas for surfing in Poland, fishing and hunting in expansive array of lakes and forests. When visiting Kashubia, renowned for its beautiful landscapes, it is worthwhile to take some time to explore the unique cultural identity of this ethnic group, its language and traditional customs. One can also learn about the history and contribution of the Mennonites, who settled here centuries ago. One can also get closely acquainted with the “Baltic gold” by visiting the only Amber Museum in Poland let us not forget about a great number of diverse, cultural events for all tastes – from the famous St. Dominic Fair, through jazz festivals to concerts at the unique open air opera.

In choosing Pomorskie Voivodeship one should bear in mind that it is:

- number one export per capita region of Poland,
- second in Poland in terms of the percentage of population with higher education,
- fourth in Poland in terms of the number of business entities per 1,000 inhabitants,
- second in Poland in terms of average disposable income per capita,
- first in Poland in terms of the number of households equipped with a PC,
- second in Poland in terms of registered NGOs.

POMORSKIE

VOIVODESHIP



Besides this, Pomorskie Voivodeship:

- has a positive migration balance,
- enjoys the highest birth rate in Poland.

According to a poll taken in 2005 by the Polish daily newspaper "Gazeta Wyborcza," inhabitants of Pomorskie Voivodeship are the most satisfied with their lives compared with inhabitants of other regions in Poland.

Immediately following Poland's accession to the European Union in May 2004, Pomorskie Voivodeship started actively participating in EU development processes. Through its presence in international structures it plays a part in creating a common policy of the United Europe. It is also one of the leading regions in applying European funds for the development of infrastructure and improvement of social conditions, as well as raising the competitiveness and innovation level of the voivodeship.

The period of 2007-2013 – the latest budget schedule for the European Union – will without doubt, bring further development of the voivodeship.

Pomorskie Voivodeship is a good place to invest and conduct business. There are numerous companies with foreign capital present here. Strong Polish capital firms are also developing dynamically, including small and medium sized enterprises which are very successful on the demanding international market. Some of them are presented below:

International Paper – Kwidzyn S.A. – since 1992 it has been a part of the largest world paper corporation – International Paper. Entire production is conducted with the outmost concern for environmental protection. In the environmental protection respect, the plant extends support to the town of Kwidzyn, processing city sewage at its modern biological sewage treatment plant and supplying the municipal heating system from its own heat and power station. The organisation of production, environmental protection and working conditions is based on the Integrated Management System, including the ISO 9001, ISO 14001 and PN/OHSAS 18001 norms.

Polpharma S.A. Pharmaceutical Factory – the largest Polish producer of medicines and pharmaceutical substances. It specialises in production of cardiological, gastrological and neurological medicines. The company has its own representative offices in Russia, Lithuania, Ukraine and Kazakhstan.

In 2000-2005, the company spent over EUR 150 mln on investments, creating modern infrastructure for production, research and development, logistics and marketing.

"Hydromechanika" Wiesław Szajda Company – a private company established in 1981, rendering services in machining and complex parts production for many branches of the industry. Almost 100% of its production is exported to EU countries, as well as Canada and Norway. In 2004, the company implemented production of the globally unique oncological dome for diagnostics and irradiation of brain tumours, and in 2005 began production, assembly and tests of a mechanical pipe connector for connecting oil and gas pipes directly on sea-bed (up to 3 km) and instant couplings used in connecting transmission and fiber optic cables under water.

“Glas Woźniakowski Jankowiak” Sp. J. Company – located in the Słupsk Special Economic Zone, the company produces car windowpanes for over 650 of the most popular passenger cars in Europe, as well as delivery vans and special vehicles. The plant is equipped with modern production lines, making production of large size bus windowpanes possible. As the only market player of global reach, it is a widely renowned firm in the field of repair and replacement of car windowpanes, active in 24 countries on three continents.

Floors Sp. z o.o. – production of parquet and floorboards from solid oak with the use of modern technology. 95% of production is exported, mainly to the UK and Denmark, Norway, Sweden and Germany. Its oak floors can be found in London, also in the Korean Art Gallery of the British Museum, the National Museum and at Heathrow Airport.

Out of concern for the environment the company has built an environmentally-friendly boiler house, utilising renewable energy sources, which provides for the needs of the plant and several other communal buildings and inhabitants of the Brusy Commune.

We invite you to make direct contact with:

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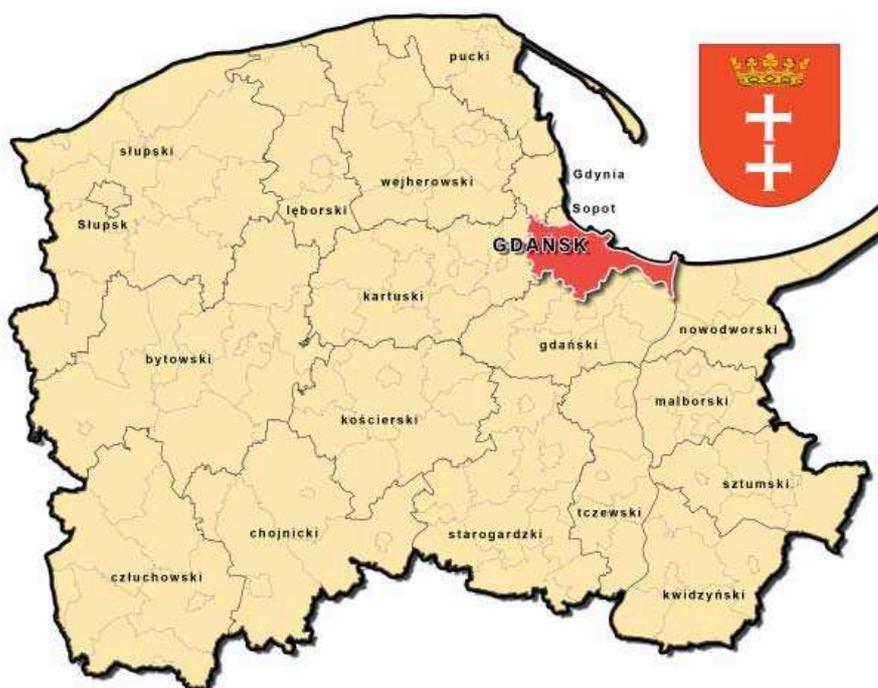
GDAŃSK

CITY



Description

Gdańsk is a major city of half a million inhabitants, an important economic, scientific and cultural centre and a popular tourism and recreation centre. For many years it has been a widely known forum for international meetings of politicians, business people, scientists and artists, an initiator of many important undertakings and events. The thousand-year-old Hanseatic town, located on the Bay of Gdańsk on the south coast of the Baltic Sea, has played a key role in trade between Northern and Western Europe and Central & Eastern European countries. Today, Gdańsk is an example of a well managed city, developing dynamically and effectively and attracting successful people. Numerous industrial plants and active participation of the municipality in international trade have led to accumulation of substantial funds which was reinvested into new economic activities, putting the city in the lead as one of the largest economic centres in Poland. Gdańsk is very well prepared for new international investments, with its rich offer, range of attractive incentives and possibilities of investing within the Pomeranian Special Economic Zone (PSEZ). The PSEZ within the area of Gdańsk offers the option of income tax exemptions and access to complete technical investment infrastructure.



Most interesting businesses

The last several years have brought an immense transformation in the character of Gdańsk's economy. Its structure has changed fundamentally with the dominant position of the private sector. Today, private companies form an absolute majority, especially in the construction and services sectors, employing over 80% of all people working in the enterprises sector in Gdańsk. Traditional industrial sectors, i.e. shipbuilding, petrochemicals, chemicals and the food processing industry continue to lead: Gdańska Stocznia Remontowa SA (Gdańsk Repair Shipyard) is the European and global leader in ship repairs. Most of the revenues generated from ship repairs and overhaul comes from foreign orders.

Crude oil processing and chemical industry form another pillar of Gdańsk's industrial sector. Grupa Lotos SA is the second largest producer of liquid fuel and oil derivatives in the country (about 20% of the Polish liquid fuel market). The LOTOS Group is a capital group that includes, among others, LOTOS Czechowice, LOTOS Jasło and the mining company Petrobaltic, as well as 16 other companies grouped under the LOTOS banner. 5,435 people were employed in the capital group at the end of 2005. The net profit of Grupa LOTOS SA after four quarters of 2005 was €241.5 mln.

Several domestically and internationally well-known electronics and telecommunication equipment producers have chosen Gdańsk for their location:

DGT – producer of large digital telephone switchboards, wireless and special communication systems,

Unimor Radiocom – radio communication equipment for aviation and other products,

Platan - digital subscriber telephone switchboards,

Telkom-Telmor – producer of telecommunication infrastructure components,

Satel - electronic alarm systems,

Technoservice – assembly boards for electronic elements and electronic systems,

Emtal – producer of ICT and electronic systems for mass transportation.

The scientists and engineers employed by Intel's R&D department in Gdańsk – Intel Technology Poland - work on applications for the most modern data transfer technologies. Another Gdańsk company - Young Digital Planet – creates technologically advanced multimedia educational programmes which have gained wide acclaim both in Poland and abroad. Gdańsk is also the location of the second most popular internet portal in Poland - Wirtualna Polska - and Lido Technology Poland, providing IT backup for one of the world's largest aircraft carriers, German company Lufthansa.

Why Gdańsk?

Gdańsk is one of a few dozen places in the world where Intel Corporation has located its research and development centres. The Gdańsk Centre, specialising in cable and cordless communication technologies, cooperates and competes for new development projects with other Intel centres, located, among others, in the United States, Western Europe, Russia, India and China. The possibility of finding well-educated staff, high quality operational infrastructure, convenient location in the vicinity of strong academic centres, and a clean and friendly environment are the factors influencing the decision to develop these centres. Gdańsk affords such possibilities, hence our presence here.

Leszek Pankiewicz, President of Intel Technology Poland

GDAŃSK



CITY



The spirit of change, faith in new chances and social energy without any doubt made Gdańsk stand out on the map of Poland at the beginning of the 1990s. The founders of the bank felt that Gdańsk should be not only the cradle of new ideas, but also one of the sources of the economic transformation. They believed that the nationwide company could be built in and managed from Gdańsk. Time has shown that they were right.

Mariusz Karpiński, President of the Board of GE Money Bank SA

International cooperation

Gdańsk is one of the most international cities in Poland, right after Warszawa. The international activity of the City of Gdańsk is in line with the key priorities of Poland's foreign policy. Implementation of this activity takes place in an atmosphere of consensus among all political forces represented on Gdańsk City Council. On one hand, the city's international cooperation is determined by its geographical location, on the other by cultural and historical heritage factors, as well as its scientific, cultural and creative potential.

The directions of Gdansk's international cooperation are aimed at marking its position on the map of uniting Europe. Gdańsk is a member of several international organisations, among others: the Union of Baltic Cities, the Hansa Union, the international tourist organisation Baltic Sea Tourism Cooperation, the European Cities Consortium "Eurocities" and the International Association of Local Governments and Telecities.

Gdańsk cooperates with many foreign cities meeting certain criteria. The cities play an important role in their respective regions. Gdańsk has concluded 17 partnership and cooperation agreements with the following cities: Astana (Kazakhstan), Barcelona (Spain), Bremen (Germany), Cleveland (USA), Helsingör (Denmark), Kaliningrad (the Russian Federation), Kalmar (Sweden), Marseille (France), Newcastle (UK), Nice (France), Odessa (Ukraine), Rotterdam (Holland), Rouen (France), Sefton (UK), St. Petersburg (the Russian Federation), Turku (Finland) and Vilnius (Lithuania).

It is not only such wide-ranging cooperation with numerous cities and international organisations that gives Gdańsk its strong position in international opinion, but also and most of all, the character of its economic cooperation. Modern Gdańsk is becoming a very attractive place for foreign capital and the scale of such investments grows year after year. An excellent investment offer and broad support from the city authorities have attracted numerous large investments worth hundreds of millions euros in recent years.

Gdańsk is becoming the "Polish Silicon Valley," where a few world-renowned international brands, such as Intel, Compuware, Lufthansa System and Japanese Suruga Seiki, which produces specialist sub-assemblies and components for car injectors and precision instruments, are already present.

Our real estate market

The City of Gdańsk has always been an attractive place for investments of all kinds. The city's rich investments offer makes it possible to invest in all sectors, from tourism and the hotel industry, Business Process Offshoring, to heavy industry.

There are many investment sites in Gdańsk. Currently, the city authorities are preparing for the development of an 8-hectare site in the very city centre, earmarked for the largest multi-functional object in northern Poland. The working project "Targ Sienny i Rakowy" (the Hay and Crayfish Market) envisages construction of new, high quality complex with several thousand sqm of office and commercial space, as well as investments in culture, hotels and restaurants.

Investors wanting to conduct business in Gdańsk have at their disposal a dozen or so office buildings in the city centre which they can fit out to their own specifications.

As a port city, Gdańsk also has well over a hundred hectares of undeveloped sites in the vicinity of the port and the shipyard. Currently, the Deepwater Container Terminal Gdańsk S.A. is constructing a modern container terminal for almost \$500 mln. Behind the terminal is a reserve of about 140 hectares for a modern logistics centre, which is waiting for an investor.

Gdańsk is the only city in Poland with over 70% of its area covered by current zoning plans, and with a very rich investment incentive offer driving strong dynamics and ensuring profitable investments.

If you are considering a good investment Gdańsk is the place you can carry out your plans in a fast and safe way. We invite you to look at our current offer of the ready-to-invest sites, at the www.gdansk.pl/inwestycje.php.

Gdańsk City Council's Business Service Centre welcomes all the investors planning to start their business in Gdańsk. Here you will be guided through the entire investment process, without losing precious time.

Our people – there to help you:

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GDYNIA



CITY

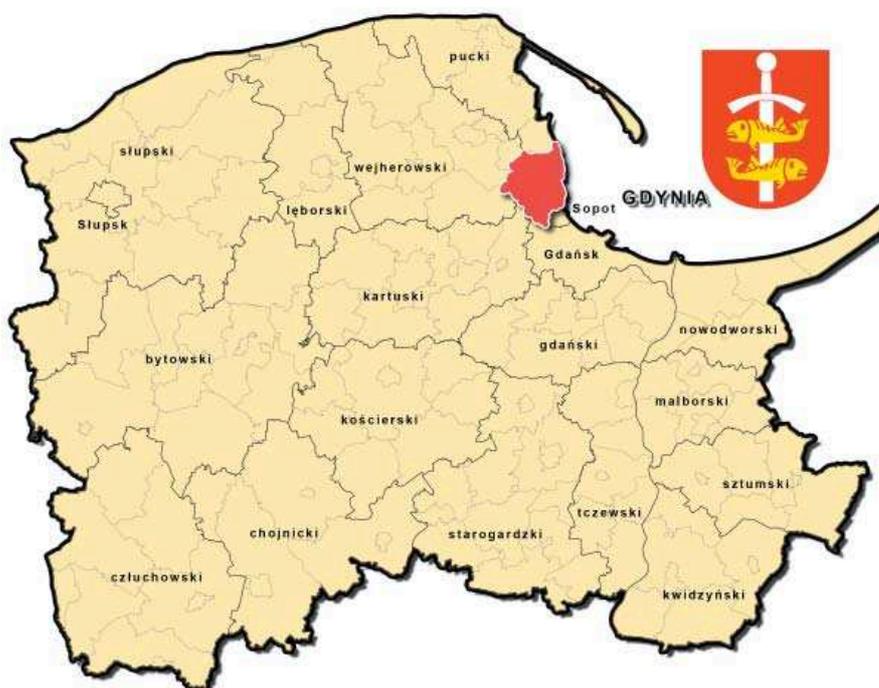


Description

Gdynia has many qualities important for investors: excellent location, full availability of energy resources, a well educated workforce, clean environment, and on top of all this Gdynia is a beautiful city with a comfortable pace of life. The city also has other key factors guaranteeing success – energy, strength, vitality and courage.

In a range of polls conducted by renowned Polish publications (Rzeczpospolita daily newspaper, WPROST and WSPÓLNOTA weekly magazines), Gdynia ranked among the leaders in Poland in terms of quality of life, evaluation of the work of local government and safety (in the “Safe Commune” competition, announced by the Minister of Interior and Administration).

Gdynia is also one of the leaders among cities most attractive for investors. It is worth mentioning that the number of foreign capital companies in Gdynia is one third higher than in other Polish cities of a similar size. The unemployment rate is relatively low in Gdynia – currently (May 2006) at 7.1%, whereas the average in Pomorskie Voivodeship stands at 18% and in the entire country at 16.5%.



Most interesting businesses

The business-related services sector is well developed in Gdynia. Companies representing sectors such as finance, consulting, agency, research and development and data processing constitute 23% of all companies doing business in the city.

In recent years many modern office buildings of the highest standard have been built here: BALTIC BUSINESS CENTER, CHIPOLBROK, CITY ARCADE, ALFA PLAZA, HOSSA, PROKOM and CENTRUM KWIATKOWSKIEGO. Their design, quality of work and functionality are a showpiece and at the same time make Gdynia a modern city, open to the world.

It is hardly surprising that Gdynia remains a leader among Polish cities in terms of the number of foreign entrepreneurs that have invested over \$1 mln. Prior to investing all of them obviously checked local conditions very thoroughly...

Companies worth taking a notice of include: COCA COLA, FRANKE GASTOPOL, DELLNER COUPLERS, HUTCHISON PORT HOLDINGS GROUP, TERRANOVA WEBER, KING CROSS, INTERNATIONAL CONTAINER TERMINAL SERVICES Inc., TESCO, NORDEA BANK AB.

Besides traditional industrial sectors, such as the port, shipping and fishery, which laid the foundations of the city, in recent years companies associated with 21st century sciences, IT and biotechnology, are also booming in Gdynia. Gdynia is already a good address – both for those starting out in such modern fields and for global corporations seeking an excellent location for their next branch. The magnet that brings them to Gdynia is above all its well educated workforce, the presence of universities and scientific and research institutes and the positive climate for business.

Gdynia's Pomeranian Science and Technology Park is a type of an incubator of new solutions, and at the same time offers opportunities to put in practice bold new ideas. Scientific thought and business intersect here to create products that are highly innovative, unique and market-appealing. There are currently four modules – in the area of biotechnology and environmental protection, industrial design and Information Technology.

Gdynia is the headquarters of such major companies as: PROKOM SOFTWARE (the largest Polish IT company, considered the most innovative company in the country) and RADMOR (the largest Polish producer of modern radio communication equipment for NATO).

Vector - another company from Gdynia - one of the youngest leaders in Polish and European IT business – is an expert in designing, manufacturing and integrating communication systems, and the provider of equipment for the European cable TV network operators: UNITED PAN-EUROPEAN COMMUNICATIONS, ESSENT KABELCOM, TELEWEST.

Two of the three largest cable TV network operators in Poland - MULTIMEDIA POLSKA and VECTRA – were also established in Gdynia.

GDYNIA



CITY



International cooperation

Gdynia is a truly European city. For many years now it has had partnership contacts with numerous cities in the East and West of the continent and is an active participant in international town and region cooperation, especially within 'Baltic Europe.'

It is among the founding members of the Union of Baltic Cities, promoting economic and cultural development in the region; it also took an active part in creating the Baltic Euroregion. It cooperates with the Union of Baltic Economic Chambers – promoting free trade. It also belongs to the Baltic Ports' Organisation, engaged, among other things, in environmental protection and the Baltic Sea Tourism Commission – promoting tourism.

Gdynia, together with Swedish Karlskrona, initiated the establishment of the Association of Amber Motorway Cities, uniting the towns located along the trans-European A-1 Motorway.

Gdynia is a perfect location for international economic meetings. In 1994 it hosted a large economic meeting – EUROPARTENARIAT - organised for the first time outside the European Union. This was a meeting of representatives of 400 Polish companies with representatives of about 1,700 enterprises from Western Europe. In 1996, BALTIC SEA PARTENARIAT, directed at small and medium sized enterprises from Baltic countries representing the maritime sector of economy, took place in Gdynia. Over 1,000 companies from Poland, Lithuania, Latvia, Estonia, the members of European Union, Norway, the Czech Republic, Hungary and Russia participated in the event. In June 2005, Gdynia was the location selected by the presidents of Poland and Ukraine for their economic summit.

Our real estate market

Gdynia has a high position in terms of raising EU funds for its development. The amount of subsidies to date has exceeded €100 mln and in this way we have been able to solve many important problems, in road construction, modernisation of water and sewage systems and waste management systems, public transport, marinas and the construction of a Pomeranian Science and Technology Park.

The biggest municipal investment in Gdynia is the Kwiatkowskiego Highway. The investment comes to PLN 240 mln and is 75% financed by European Union structural funds, the rest by the city itself.

The second most important road investment in Gdynia is the modernisation of Janka Wiśniewskiego Street, which similarly to Kwiatkowskiego Highway – has a major importance for the functioning of Gdynia Port. The total renovation cost will amount to over PLN 50 mln. Works are scheduled to end in November 2006.

Both investments will enable heavy traffic into and out of industrial zones to be shifted away from the city centre.

Decisions on these investments, such as the decision to construct the A-1 Motorway from the north to the south of the country, with its initial kilometre nr '0' in Gdynia – have already had a positive impact on the region's economic upturn.

Today Gdynia is one extensive construction site. The city will develop westwards, i.e. towards the residential complexes beyond the Ring Road. Several years from now, 40,000 of Gdynia's inhabitants will live here. Gdynia city centre will also change soon due to city's investments such as the Museum or the Sports and Performance Hall, as well as private investments, since Gdynia's real estate market has a very high private land ownership ratio, which simplifies land sale&purchase transactions.

A 100-hectare undeveloped, but serviced site, lying on the border of the city centre and the port, colloquially called "Międzytorze" (Between the Tracks), is unique in Europe (http://www.gdynia.pl/?co=inf_gosp/oferta&lang=en). The site is designated for a modern, multi-functional district, where port and city centre functions can intertwine.

An equally attractive offer, especially for investors interested in building hotels, holiday homes and tourist facilities, is the so-called Urban Waterfront Prestige Zone (http://www.gdynia.pl/?co=inf_gosp/oferta&lang=en). The proximity of the sea and the direct border with the city centre are the main advantages of the area. The northern part of the zone, until recently within the port's limits, is currently undergoing substantial transformations. The GEMINI Culture and Entertainment Centre is also here and construction of tourist services, recreation and an educational complex, with a hotel and congress centre, is planned. It is also here that the SEA TOWERS – the highest residential and services complex in Poland, with an outstanding architectural design - is being developed, in a picturesque location on the bay, next to Kościuszki Square. This will most likely present a positive challenge to investors of other equally ambitious projects.

Gdynia has a bright future!

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WEJHEROWSKI COUNTY



Description

Wejherowo County is located in the northern part of Pomorskie Voivodeship, in the proximity of the Tri-City – about 40 km from the centre of Gdańsk, on the Berlin-St.Petersburg route. It includes three towns: Reda, Rumia and Wejherowo, and seven rural districts: Choczewo, Gniewino, Linia, Luzino, Łęczyce, Szemud and Wejherowo, with a total area of 1,280 sq km. Over 180,000 people live in the area, making Wejherowo the most populous rural county in Pomorskie Voivodeship.

The characteristic geographic feature of the county is the glacial valley of Łeba-Reda, which creates a natural border between the Kashubian coast and the Kashubian Lake District. The county's coastline is 17 km long. This part of the Baltic coast is exceptional because of its rich nature and the absence of crowds, making it a quiet holiday retreat.

Forests cover over 40% of the county's area. North of Wejherowo, the Darżlub Forest stretches up to the Puck Bay, famous for its splendid beech-trees. In the eastern and southern parts of the county are dense forests with rich undergrowth that create the Tri-City National Park. There are many lakes dotted across the whole of the area of the county – the picturesque small lakes of the Kashubian Lake District (Pojezierze Kaszubskie) in the south, and larger coastal lakes in the north, including the picturesque Żarnowieckie Lake, one of the largest in Kashubia, an excellent location for water sports. In addition, located in its vicinity is the "Żarnowiec" Special Economic Zone.



Some very interesting architectural monuments, mostly palace- park complexes and manor houses, elements of impressive cultural heritage well worth a visit, are located within the county's territory. Some of them have been restored and adapted for tourism by private investors.

Wejherowo County boasts many natural features that make it a great place for tourism, including active tourism – hiking, cycling and horse riding. There are designated hiking paths, numerous bike paths and horse riding and rambling paths.

The county's mission statement is "Wejherowo county – economically strong, attractive for tourists, rich in cultural heritage and tradition, friendly to locals and guests, creating favourable investment conditions and opportunities for grassroots initiatives".

You can find more economic, social and tourist information on Wejherowo County at www.powiat.wejherowo.pl

Wejherowo County has an excellent geography, making it one of the most attractive locations in several respects. Its proximity to the Tri-City, its constantly improving road network, attractive investment areas, tourist attractions (the National Park, access to the sea, the large number of lakes and forests), the large number of qualified and experienced staff - with cooperation between communes, brings clear benefits to each of the communes and subsequently for Wejherowo County as a whole.

The county, as a local self-government unit, is not eligible to create investment opportunities on its own initiative, nor can it come up with own investment offers – these lie within the power of communes. Counties have an indirect role in making their territories more attractive. Numerous road investments also serve this purpose. In the period 2003-2006, the Wejherowo County, along with local Communes, utilized the SAPARD, ZPORR and World Bank funds, investing nearly PLN 23.5 mln in renovation and investments connected with the road network of the county.

Among those investments, one already finished project co-financed by ZPORR is worth a particular mention: "Construction of county road No. 1431G Niepoczołowice – Kamienica Królewska".

In order to facilitate the administrative procedures in the local council an e-circulation will be introduced soon and a web portal e-powiat will be operational within the project "E-powiat - the development of electronic services in the region of Wejherowo County".

The above project will enable locals to engage in administrative affairs in the 11 local government units of the county, with the use of a secure electronic signature. The communes of Wejherowo County present their investment offers on their websites. Collective information can be found on the county's website.

WEJHEROWSKI COUNTY



Local Government	www website
Wejherowo County	www.powiat.wejherowo.pl
Wejherowo Town	www.wejherowo.pl
Reda Town	www.reda.pl/
Rumia Town	www.rumia.eu
Choczewo Commune	www.choczewo.com.pl
Gniewino Commune	gniewino.logonet.pl/
Linia Commune	www.ug-linia.pl
Luzino Commune	www.luzino.pl/
Łęczyce Commune	www.leczyce.com.pl
Szemud Commune	www.szemud.pl
Wejherowo Commune	www.ug.wejher.pl

The communes have prepared local zoning plans in which they have included industrial-production-storage areas, service, commercial and residential areas.

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WEJHEROWO



TOWN

Description

The Town of Wejherowo, over 360-years old, is becoming an increasingly popular place to live in. For several years now we have noted steady growth in housing development. Thanks to the rise in the quality of life in Wejherowo, and its extensive housing offers, very few people are leaving the town, in fact new inhabitants are increasingly attracted here and these people will play a considerable role in our town's development in the future.

The following factors determine the competitiveness of the town: well developed infrastructure, a rich cultural offer, safety, a historical old town - creating a specific climate - and an excellent transportation system. The SKM (the fast city train system) connection and the Tri-City Ring Road make access to anywhere in the conurbation fast and easy, be it to the port (25 km), the ferry station (25 km) or Lech Wałęsa Airport (45 km). The Szczecin-Gdynia train line also passes through Wejherowo.

Investing in Wejherowo is also worthwhile. The town received a statuette and certificate – a Certified Investment Location - in the "Fair Play Commune" competition in 2003-2005. The competition is organised by National Economy Chamber (KIG) and the Democracy and Private Enterprise Research Institute (IbndiPP), aimed at identifying investor-friendly communes throughout Poland. For the town this is a confirmation of its high standards in services for investors – a friendly attitude and the reliable and effective services rendered by the town's administration. Wejherowo received an award in this competition for development of the housing industry and its above average cooperation with the local community.



WEJHEROWO



TOWN



Wejherowo is one of the few towns and cities in Poland to have a developed, binding Zoning Plan (covering 98% of the town), drawn up in accordance with current regulations and passed by the town council. Investors do not need to apply for development conditions before beginning construction and the investment process is much shorter!

The town is a very attractive tourist destination. Wejherowo, surrounded by forests, was listed among "The Most Popular Tourist Places in Poland in 2003." It is famous for Kalwaria Wejherowska, one of the oldest Passion Sanctuaries in Poland. A complex of 26 chapels located on rolling moraine hills, visited by numerous tourists and pilgrims, is often called The Holy Mountains or the Kashubian Jerusalem. Wejherowo is a good starting point for tourists, both those planning to visit southern Kashubia or the coast.

The economic advantages of Wejherowo:

- convenient location,
- proximity of a large urbanised area,
- well developed technical infrastructure,
- well developed transport network,
- valid zoning plan,
- multiple tourist attractions,
- high quality of nature and landscape environment,
- high human potential,
- growing number of inhabitants, thus a developing consumer market,
- dynamic development of small and medium size enterprises and high activity of community and economic organisations,
- a good school network,
- stress on public safety.

Most interesting businesses

Housing development

A noticeable contribution to the town's spatial development has been made by the developer Orlex Sp. z o.o. Thanks to its initiative, new houses, but also whole residential complexes for 300-500 people have been erected in the town. Thanks mainly to Orlex, Wejherowo can boast the highest housing growth ratio per 1,000 inhabitants in Poland.

Orlex is a family business, with 100% of Polish capital but based on German standards. The company was established in 1990 and carried out its first construction projects in Germany. It has been active on the Polish market since 1996. The company does not employ subcontractors, finishing all works on its own. It has its own design department and a complete range of construction equipment. Apartments delivered by Orlex stand out for their high quality, energy-saving, low exploitation costs and above all, prices, which are 40-50% lower than prices for other developers in the Tri-City. All of this results in apartments being sold even before foundations are laid. Orlex is a winner of many prizes and awards, among others of the golden order of merit for construction.

Kaszuby Centre

The Kaszuby shopping centre resulted from excellent cooperation between the local government and local business. In 2001, Kaszuby Inwest Company was established, at the initiative of Wejherowo authorities and local enterprise community, by 25 local investors. In the 2002-2005 period, the company had built a modern shopping centre, which is similar in architectural design and finishing to projects carried out by foreign investors. Its rapid construction was facilitated by the town authorities, who immediately issued the certificates and permits required by Polish building law. It has held numerous shows, mini-concerts and performances.

In the years ahead the company intends to build an extension to the shopping centre. The reinforced foundations and construction allow the building of at least one more storey, which is provisionally planned for 2008-2010.

International co-operation

Wejherowo has an increasing number of foreign visitors, both tourists and business partners of local companies. The town authorities are in contact with the Swedish commune of Tyresco, the French of Rouen and the University of Ivano-Frankivsk in Ukraine.

Foreign investors are welcome to Wejherowo. They can count on help from the town's authorities. To date the following companies with foreign capital are economically active in the town: POLCOVA Sp. z o.o. (Spanish capital, wood sector company), KAUF LAND, INTERMARCHE, BRICOMARCHE, BIEDRONKA, LIDL, SHELL, BP and NESTE.

Our real estate market

The Town of Wejherowo has prepared properties for sale both for investors and developers interested in multi-family residential developments and construction of commercial and service complexes and industrial buildings, as well as for individual customers wishing to construct a single family house. The most interesting proposals are:

- **INDUSTRIAL DISTRICT**

Attractive plots for investors are found in the industrial district of Wejherowo, close to the modernized national Road No 6. The site is earmarked for construction related to production and commercial-services economic activity.

- **SREBRNA RESIDENTIAL COMPLEX**

This is an undeveloped district in the historical town centre, earmarked for residential development with a services function and a town-centre feature.

- **FATHER GRZEGORZ HILL**

This area on the town's outskirts is currently being prepared for sale for detached single-family house construction.

A detailed Wejherowo investment offer is available on the Internet at:
www.wejherowo.pl/inwest2005/

WEJHEROWO



TOWN

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RUMIA



TOWN

Description

Rumia is located on the western, densely forested slopes of the Kashubian post-glacial stream valley, on the river with a charming name of Zagórska Struga (Beyond the Mountain Stream), in an area with a very distinct topography bordering different landscape forms. The Reda canal and marshland, the so-called Mostowe Błota, form the northern border of the commune, while from the east Kępa Oksywska lowland meadows, from the west forested moraine hills and from the south the Chylonia marshes perform the same function. The town's climate is influenced by the nearby Baltic Sea, which is only 11 km away. A gentle summer breeze soothes the summer heat, filling the air with moisture. The Baltic's proximity is the reason why the Polish Golden Autumn (Indian Summer) lasts much longer here than in other parts of the country, while spring arrives later and the winters are milder, but with more snowfall.

Rumia is an important part of the urbanised Tri-City of one million people, creating a compact city organism. It borders with Gdynia in the south, with Reda in the north and with Kosakowo Commune in the east. Its convenient location on the important tourist track, leading from the south of the country to the Hel Peninsula, in addition to a good local transport system, make Rumia an ideal base for trips to the Hel Peninsula, northern Kashubia and the Tri-City.



RUMIA



TOWN



Most interesting businesses

The Rumia Commune has already been awarded the "Fair Play Commune" title – Certified Investment Location - three times, resulting in the prestigious title of "Golden Business Location." This award, in addition to its convenient location, human capital and favourable business environment created by the local authorities are the reasons that many foreign companies have invested in Rumia in recent years. Such market giants as Baltic Gas, British Petroleum, Castorama, ESSO, McDonald's and Toyota have picked us. Auchan plans to open its new hypermarket in 2007. Our local Rumia companies are also functioning well in today's complex market. There are over 4,000 business entities registered in the commune. Most of them are family businesses, engaged in pro-ecological production and service activity. However, larger enterprises are also developing dynamically: Alucolor is a successful producer of blinds and roller-blinds, Bob-Rollo produces PVC/ALU fixtures, roller-blinds, swimming pools and executes road works, Meblomak makes furniture and Proryb engages in fish processing. Among the large factories one can also mention FAKO Boiler Factory, Shipping Equipment Factory and meat cold-cuts producer Kummer. In spite of the strong competition they have maintained their market position and have won awards and prizes. Rumia also has a large and unique (on a national and even European scale) cactus plantation belonging to Mr.&Mrs. Hinc.

International cooperation

Progressing globalisation and European integration are "shrinking" the world and forcing entrepreneurs to seek markets in all far flung corners of the globe. This is one of the reasons foreign investors choose Rumia as the headquarters of their new branches. Owners of car factories, fuel concerns, fast food restaurants and DIY shops from abroad have decided to locate their businesses in Rumia. Rumia companies also present their offers abroad. Most large enterprises from our commune export their goods, finding clients among the citizens of other countries. This indicates the highest quality of the goods produced in Rumia, which meet the demands of the most demanding clients.

The town's location within the borders of the Tri-City urbanised area makes expansion to foreign markets much easier for Rumia's own entrepreneurs, as well as making it easier for investors with foreign capital to develop their businesses here. The Road No. 6 Gdańsk-Szczecin of national highway status, passes through the commune. The railway, passenger and cargo ports, international airport and the North-South express road are all also nearby. In addition, there are many universities close by, which makes the finding of qualified staff of various specialties in Rumia easy. Finding those with an entrepreneurial spirit is not a problem either. Labour is relatively inexpensive, since the unemployment rate in Rumia is higher than in the neighbouring Tri-City.

Our real estate market

Rumia Commune offers investors sites at attractive prices – lower than in the nearby Tri-City. Properties have a very attractive location, near important transport routes, in the area of northern Kashubia, in the vicinity of the Baltic Sea. The pro-investment policy of the local government favours new business start-ups in the town, at the same time giving a guarantee of professional service and assistance in establishing contacts with the owners of land available for sale or rent. Tax rates and fees, fixed on an annual scale, lower the business risk. The town's constant development, including roads and sewage system expansion, make Rumia even more attractive. In addition, with investors in mind, the commune plans to develop services infrastructure in new locations, thanks to which entrepreneurs benefit from time and money savings. The town is also changing its zoning plans, aiming to develop its commerce and services even further. Housing and service sector construction is steadily increasing. The authorities are making efforts to obtain EU funds for further investments to make the town even more attractive. You can find our investment offers at www.rumia.eu.

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SOPOT

TOWN

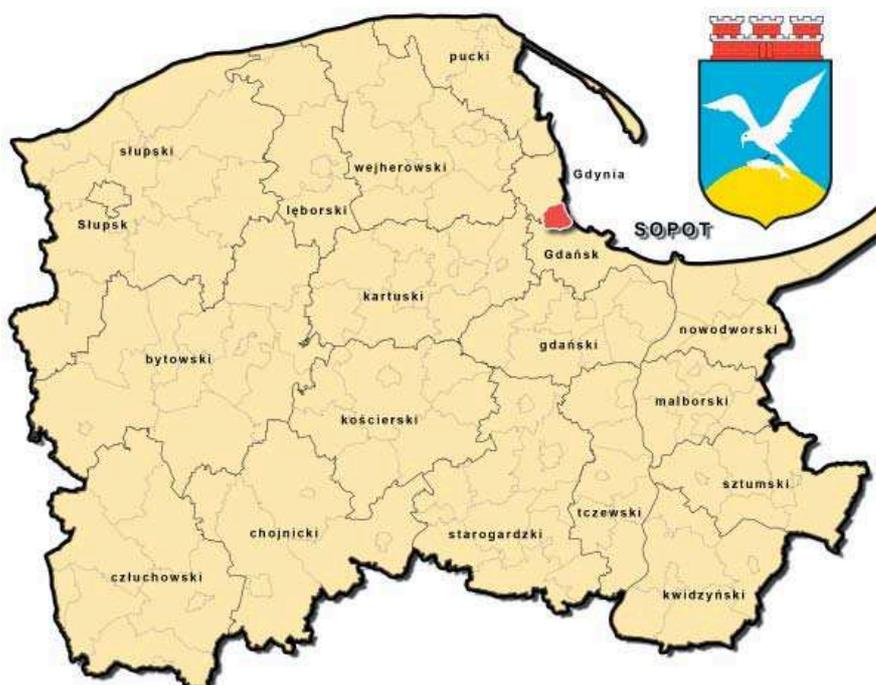


Description

Sopot is a charming spa town, full of greenery, with numerous attractions and natural beauty, making it a real paradise for visitors – both for those seeking traditional beach pleasures, as well as lovers of sport, entertainment and cultural events of the highest calibre. But Sopot is also, perhaps above all, a great place to live, work and invest in, as reflected in its high ranking in many popular polls and statistics.

It would be difficult to find another place quite like Sopot, where over a century of spa-town tradition and beautiful historical architecture harmoniously merge with modern outlook, and intermingle with a dynamic, open attitude to new, daring initiatives. In Sopot we take care to create a positive atmosphere; the well-being of local residents and entrepreneurs being the absolute priority for development. Magnificent recreational conditions, abundant tourist and spa accommodation base, well organised system of communal and public services and the prestige and reputation of “The Pearl of the Baltic” – all these elements support new enterprises in creation of more successes on the basis of Sopot’s outstanding workforce and infrastructure.

Sopot is an ideal place for active people in search of life and business at the world-class level. Investing in Sopot opens up opportunities of reaching a huge group of quality clients, making full use of favourable winds that never seem to leave this unique seaside town...



Most interesting businesses

The tourist, recreational and services sectors have been developing dynamically in Sopot over the last decade. With the town's rapidly increasing prestige, top class housing developers, owners of exclusive hotels and restaurants make it their favourite place for presenting their ever-growing offer. Numerous companies from the banking and finance sectors, marketing, new technologies, medicine and others have made Sopot their place to be as well.

There is no doubt that the most spectacular undertaking of recent years is the modernisation of the town centre, commenced in 2006, covering the very heart of the lively spa town – the lower part of the popular Monte Cassino promenade. The project is carried out by Centrum Haffnera Sp. z o.o., with the Town of Sopot, NDI SA and PKO BP SA holding shares. It calls for construction of five new investments: a shopping centre with an area of 10,688.2 sqm, Spa House with a SPA centre and a conference and convention centre, an apartment building, an office building with a multi-storey car park and a five-star hotel. In 2008 locals and tourists will see a modern – though remaining in harmony with traditional architecture – brand new complex offering a whole range of attractions.

Every year new beauty parlours are opening in the town, as well as medical practices, cafés and sporting facilities. The demand never stops growing. The recently started construction of a huge sports and performance hall and construction of a marina planned for the near future will undoubtedly attract another wave of accompanying services.

For the enterprising ones, Sopot offers excellent conditions for development of spa and health services in the spa-protection belt. One may well expect that with growing worldwide interest in SPA services, this form of tourism will certainly become yet another success for the town.

International cooperation

Sopot is a truly European town, not just because of foreign-speaking crowds of tourists visiting the spa-town every year. Sopot's local authorities have close partnership relations with towns in Germany, Denmark, Sweden, the UK, Russia and Israel, and participate in multiple economic missions, international business associations and prestigious conferences for investors from all over the world.

Foreign capital has a strong presence in the town – Zong-Hua Hotel, Ergo-Hestia Insurance Company, Accor hotel group, S.M.T. ship-owner, based in Cyprus and Dutch group Ahold are just some of the fine examples of international investments located in Sopot. In addition, there are many local companies, developing dynamically, are seeking markets for their products and services outside Poland. The OCEANIC company and its world-class quality cosmetics are present not only in EU countries, but also in Russia, South Africa and the United States. Another Sopot company – Blue Media Sp. z o.o. – is conquering the Eastern markets as a telecom services integrator. Combidata Sp. z o.o., known as one of the leaders in online training and education, Bałtycka Agencja Artystyczna BART, organising entertainment events with some of the biggest world stars, are among those cooperating with Western partners on a permanent basis.

Foreign investors are very welcomed in Sopot and can count on high standards of business-related services, educated staff and attractive offices in its most prestigious locations.

SOPOT



TOWN



Our real estate market

All these advantages place Sopot at the top of the Polish real estate market. It is truly a place where it is worthwhile to do business, invest and live in. Sopot's current investment offer includes properties with a total area of approximately 3.5 hectares – designated for residential and services functions, health functions, spa healing, hotels, pensions, sanatoria and a natural medicine centre. For the most part, the local zoning plans allow investments related to spa functions and of residential character.

Detailed information on the investment offers in Sopot can be found at www.sopot.pl.

Why Sopot?

Krystyna Szawłowska – OCEANIC Pharmaceutical and Cosmetics Enterprise

Sopot is an uniquely prestigious town on the map of Poland. The town, which is the most widely recognised spa in Poland, and every year attracts huge numbers of tourists who are our potential clients, and for whom our location in Sopot can be an extra incentive to buy our products. The town's authorities always have been and remain very much in favour of enterprising development. I have to stress the excellent cooperation that resulted in OCEANIC's engagement in social and charity activities in Sopot. Our company's example is a proof that the climate of Sopot is favourable not only for holiday leisure, but also for economic success.

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ŻUKOWO

COMMUNE



Description

Żukowo Commune is located in Kashubia in direct vicinity of major urban area. The absence of intrusive industry, picturesque location among beautiful forests, numerous lakes and rivers and clean air are undoubtedly Żukowo's main advantages. The proximity of the Tri-City and a well-developed transport network make possible commune's dynamic social and economic development. Over 23,000 people live in the 19 rural administrative units of the commune: Banino, Borkowo, Chwaszczyno, Glincz, Leżno, Łapino, Małkowo, Miszewo, Niestępowo, Otomino, Pępowo, Przyjaźń, Rębiechowo, Rutki, Skrzeszewo, Sulmin, Tuchom, Widlino and Żukowo.

The commune covers an area of 164 sq km and is a part of Kashubian Lake District, with Żukowo itself being one of the most beautiful parts of this picturesque area. The commune has a nature-conservation reserve "Dolina Raduni" (Radunia Valley) and other areas protected by law: Kartuski Obszar Chronionego Krajobrazu (Kartuzi Protected Landscape Area), Otomiński Obszar Chronionego Krajobrazu (Otomino Protected Landscape Area), Przywidzki Obszar Chronionego Krajobrazu (Przywidzki Protected Landscape Area), Obszar Chronionego Krajobrazu Doliny Raduni (Radunia Valley Protected Landscape Area) and Otulina Trójmiejskiego Parku Krajobrazowego (the Protective Belt of the Tri-City Landscape Park).

Zoning plans drafted by Żukowo Commune have set out formal conditions for commune's economic development, indicating investments locations, mostly for production, handicrafts, services and residential investments.



ŻUKOWO



COMMUNE



No tourist will be a stranger in this commune: all will find many attractions here. The most important monuments in Żukowo are: the town church, dating from 1212-1214, formerly belonging to the Norbertines, with many precious works of art, the church of St. John the Baptist from 1604 and a cemetery chapel from 1754. The exhibition of Kashubian embroidery and other artefacts related to the life of the local church and inhabitants can be found in the parish museum. Żukowo's 13th century mill at, continuously operated since then until the present day, is definitely worth a visit, as is the iron-structure railroad bridge on the Gdynia-Kościierzyna track, the Gallery in Sulmin and the hydroelectric power station built in 1910-1911 in Rutki. The 18th century Palace and Park complex in Leżno is also an exceptional place worth visiting.

Football lovers can catch local teams playing at the municipal stadium. Large events, the organisation of which has already become something of a tradition for Żukowo Commune, such as St. John's Night, European Music Meetings and the Farmers' Wives' Association Tournament, are great fun and make a stay in Żukowo even more attractive.

The church walls resound with magnificent sounds of organ music and the voices of the local "Harmonia" choir. As there is a growing interest in Kashubian embroidery, there are two Żukowo school embroidery associations. Concerts and shows by these groups, presenting Kashubian folklore – the "Bazuny" Regional Dance and Song Group from Żukowo and "Stolem" Vocal and Instrumental Group from Chwaszczyno – very well known among their admirers and beyond – are an unforgettable feast both for the eyes and the ears.

Without a doubt one can spend a pleasant and active holiday in Żukowo Commune. The local forests, with their marked tourist tracks and beautiful landscapes seem to be created for hiking. The beauty of Żukowo's landscape is also furnished by the spring greenery of its farm fields, the cornfields ripening in the summer, autumnal nature with the silver threads of the Indian summer (in Polish 'Golden Autumn') and in winter the fields and meadows covered in white, snow-sprinkled orchards and forests, with ice sheets covering the waters. The particular beauty of the area is enhanced in all seasons by the picturesque waterfall in Rutki, and the 6-kilometre long Radunia Ravine between Żukowo and Babi Dół – a Landscape Nature Reserve.

Enthusiasts of active holidays can go hiking and kayaking along the Radunia Ravine. Charming lakes and quiet places along the rivers, which are a great attraction for anglers, are the commune's unquestionable key advantages. The unpolluted forests, with a majority of broadleaf trees, guarantee unforgettable moments of wonderful contact with abundance of natural fauna and flora in all seasons. Connoisseurs of fruits of the forest will definitely satisfy their palates and mushroom-pickers will find a wide variety of edible mushrooms.

Constantly growing tourist accommodation offers places in holiday centres, inns and private accommodation and Kashubian delicacies can be tasted in numerous restaurants and bars.

Most interesting businesses

In recent years Żukowo Commune has undergone a transformation from an agricultural-industrial to an industrial commune. Hence the visible growth in the number of enterprises in this part of Kashubia, the development of private enterprise and of the banking network. Efforts to prepare the technical infrastructure have resulted in investments not only from domestic capital, but also foreign investors, mostly from Denmark, Sweden and Finland. Small and medium sized enterprises in different sectors, the dynamically developing service sector, agriculture, food processing and tourism are the most important sectors of economic development in the commune.

The commune's openness to investment is reflected in local zoning plans, commune's growth strategy and in the studies of conditions and directions for its spatial development. Combined they set out the main zones of investment areas, the "Żukowo Investment Corridor" located in the belt of the main road connecting Gdynia with Kościerzyna and Kartuzy. In this area, production and industrial plants and warehouses can be located. Undeveloped land reserves in the commune mean steady development prospects for companies deciding to locate their companies here. Companies such as Unilever Polska S.A. – ice-cream production - and Ashland Poland – gel-coat production - serve as excellent examples. Swed-Polexi –the manufacturer of work safety equipment, has had its headquarters in our commune for many years now. One of the firm's investments in the commune is the hotel in Żukowo. Companies such as Berendsen Textil Service Sp. z o.o. – industrial dry-cleaners - and Tekosom Poland Sp. z o.o. – tailoring and sewing - should also be mentioned.

Tri-City inhabitants also view Żukowo Commune as a "bedroom" community for their city centres. In recent years, the number of building permits issued for single-family housing has been growing steadily. Residential development grows dynamically in the areas located on the border with Gdańsk and Gdynia; such places include Banino and Rębiechowo – the key advantage here is the proximity of Rębiechowo (Lech Wałęsa) Airport, and Leżno, located on the western border of Gdańsk. The growth of interest in investments in Żukowo Commune has resulted in demand for locations allowing for construction-related businesses. Wroński Sp.j. – the construction materials depot - and Wakoz Beton- concrete production and aggregate mining – have already expressed interest.

Our real estate market

The reason for the growth of interest in single-family housing plots in Żukowo Commune is relatively cheap price of land and plots in comparison to the neighbouring communes in Gdańsk or Gdynia. In the last half-year, the commune has adopted 7 large local zoning plans, in total 200 hectares of residential development area. All factors indicate that by the end of the year this number will double. Local zoning plans already cover 25% of the commune's area. Prices are the highest in the renowned residential development locations such as Banino, Żukowo and Chwaszczyno. Plot prices in these areas may reach PLN 70 - 80 per sqm. Nevertheless, attractive areas in other locations in the commune shape at PLN 30 - 50 per sqm. The commune owns a very limited area for residential development; therefore private property owners dominate the residential market.



ŻUKOWO

COMMUNE



Żukowo Commune is highly favourable to investment and is offers property tax breaks for land and buildings for investors starting production and service businesses in the area.

Large undeveloped areas attract the interest of developers that have to date been active outside the commune. Examples of investment projects is Tuchom, now at the planning phase – a detached housing estate developed by Invest Komfort, and a detached housing estate in Miszewo being built by Cadena. This gives the authorities a clear signal to increase the number of local zoning plans and perhaps to release more investment sites in the near future. At the same time, the commune is making efforts to use EU funds for development of infrastructure and preparation of new investment sites.

International cooperation

The goals for the nearest future include: development of cultural institutions, sporting facilities and intensification of cooperation with foreign communes. Żukowo Commune has partnership relations with Wendelstein (Germany) and Saint-Junien (France). July saw the five-year anniversary of the Communes's Partnership. In September a German-French-Polish conference "The Weimar Triangle's local governments in the heart of Europe" will take place in Krakow. German and French embassies in Poland want to commemorate this conference with the 15th anniversary of German-French-Polish cooperation. Since our partnership was established on the basis of this agreement, the participation of the mayors of the three partnership towns - Saint-Junien, Żukowo and Wendelstein - is foreseen. Such cooperation also results in blooming social and cultural exchanges.

Our people – there to help you:

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PRUSZCZ GDAŃSKI



TOWN

Description

Pruszcz Gdański is located in the southern part of the Tri-City urbanised area, a mere 10 km from the centre of Gdańsk. The town is an important motor and rail transport node. The Tri-City Ring Road passes nearby, while works on construction of the first part of the A-1 Motorway have also begun.

Pruszcz Gdański is one of the most attractive towns in northern Poland. This opinion is confirmed both by investors and national economic rankings. In recent years, Pruszcz Gdański has been listed in the "Golden Hundred of Local Governments", highly ranked in the "Wspólnota" fortnightly magazine and took 4th place in the "Local Government Investment Ranking" for 2002-2004.

Pruszcz Gdański has an area of 16.5 sq km and over 23,000 inhabitants. It is a friendly town, both for inhabitants and investors. Pruszcz Gdański is constantly upgrading its image – a new town centre is being built, with considerable attention being paid to new road investments. Reconstruction of the Roman-era merchant trading post will without doubt be an attraction improving the town's image even further. Its construction will start this year. The aim of the project is reconstruction, in accordance with ancient techniques, of a Roman settlement. It will be a lively place, where history will intertwine with the present, where visitors will feel the spirit of old times. The area of the trading post will be used for open-air events, happenings and artistic undertakings. Meanwhile, thanks to EU funds, an International Culture Park will be built. Next to the park there will run an amber route. The route will pass through the town centre, along the Radunia Canal to the Culture Park, then along Radunia River towards the railway station.



PRUSZCZ GDAŃSKI



TOWN



Most interesting businesses

Just off the Tri-City Ring Road, near the highway under construction, is an industrial district where many well-known companies have, or will soon have, their headquarters: Investa, Crown Cork, Poczta Polska and LPP S.A. Investors say it was the investor-friendly town's policy that helped them make up their minds – rapid processing of formalities and assistance right from the first steps of investor in Pruszcz Gdański. The town's excellent location and communications also play key roles. The openness policy helps business development – Pruszcz entrepreneurs regularly meet with representatives of local government. Pruszcz Gdański is a town that is alive, towns of active people – every year new companies appear on the local business landscape, the housing market is developing strongly and the number of inhabitants is on the rise.

International cooperation

Pruszcz Gdański attracts many foreign investors. For several years, companies widely known on European markets with foreign capital have been successfully conducting business here.

A qualified workforce and friendly business people guide new investors through the necessary formalities. All this awaits foreign investors in Pruszcz Gdański.

The town maintains multiple contacts with foreign partners – Finnish Loimaa, Lithuanian Silute and English Wivenhoe. These contacts also drive the town's promotion abroad.

The construction of a merchant trading post from the Roman times in Pruszcz Gdański will change the town's image and give it a tourist image. This attractive and unusual settlement will definitely attract foreign visitors.

Our real estate market

Why is it worth investing in Pruszcz Gdański?

PRUSZCZ GDAŃSKI – AN INVESTOR-FRIENDLY TOWN

LOCATION

- Pruszcz Gdański has a special industrial district – covering the area and the neighbourhood of Zastawna Street. The main advantage of the district is its location in the direct vicinity of the Tri-City Ring Road, close to the A-1 Motorway currently under construction. We also have attractive plots for housing development, both in the centre and outskirts of town.

LAND OWNERSHIP

- The Town of Pruszcz Gdański is the owner of the above-mentioned areas, therefore investors buy plots from the town. We promise all investors our assistance in arranging the formalities.

TAXES

- The taxes in Pruszcz Gdański are lower than in the neighbouring communes.

NEIGHBOURHOOD

- There are many well-known companies in the industrial district, and more investors are deciding to move their headquarters to Zastawna and adjacent streets.

BALTIC INVESTMENT ZONE

- We have obtained resources from EU funds for the completion of the Baltic Investment Zone Project of providing infrastructure to undeveloped land.

CURRENT OFFER

- Current offer includes plots of various designations – for industrial, residential and services development. These are located in different parts of town. They vary in size and all of them have clearly established legal status.

For more information on Pruszcz Gdański's investment offer see www.pruszcz-gdanski.pl
www.pruszcz-gdanski.pl/oferta.php, www.pruszcz-gdanski.pl/english.php

Our people – they are there to help you:

Ewa Twardy

Promotion Inspector

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REDA

TOWN



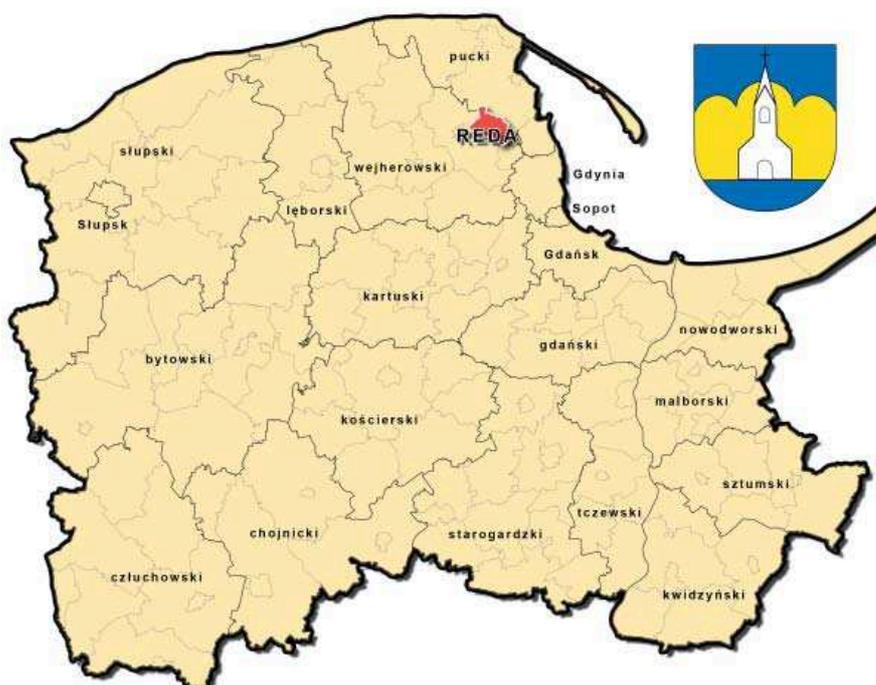
Description

Reda lies 15 km northwest of Gdynia and 7 km east of Wejherowo. It has over 18,000 inhabitants and covers an area of almost 30 sq km. It is a dynamically developing town with a well-developed commercial network, with over 700 production and services enterprises. Convenient location and road, rail, and bus communication with the Tri-City, Szczecin and Hel peninsula drive the development of various industrial sectors, as well as tourist and recreation services. The town is an excellent base for tourists visiting the Tri-City, Hel Peninsula and Kashubia. Reda, and its environs, is a charming place with varied and abundant vegetation, ideal for outdoor recreation, with lots of forests and great dendrological diversity with numerous tree specimen with formal status of natural monuments.

Reda is located in the picturesque post-glacial stream valley of Łeba and Reda rivers, between Puck and the forested uplands of the Kashubian lake district, in the vicinity of a vast lowland - Moście Błota - and in the north by Kępa Rekowska. There are important road and rail communication routes going through the town, of national and international importance.

The meandering Reda River, with large portions of old riverbed, also winds its way through the town. Its very clean waters create favourable living conditions for numerous fish species, especially brown trout, sea trout and graylings. Once a transport route, the river is today used for recreation. It is an excellent place for canoeing. Bike tours are the town's big attraction, with routes going mainly through the beautiful fields and forests of the commune.

Reda has a rich historical heritage, preserved cultural heritage and unique archaeological sites, such as an early medieval fortified settlement and a Stone Age campsite. The neo-Gothic Assumption Church at Gdańska Street, the soaring spire of which is hard to miss, is listed in the register of historical buildings.



Tourists can find accommodation, among other places, in the town's Culture, Sports and Recreation Centre, which has comfortable rooms, a café, sauna and gymnasium. One can use the sports facilities, including the athletics stadium, football pitches, tennis courts and basketball and volleyball fields.

The hotel and restaurant "Oberża pod Turbotem" is a convenient base for those visiting Hel Peninsula and the Tri-City – 30 minutes from Lech Wałęsa Airport at Rębiechowo, 15 minutes from Gdynia city centre. The hotel offers ten 1-, 2- and 3-person comfortable rooms equipped with telephone, TV and internet, with a total of 25 places. The hotel provides transport to the airport and ferry terminal.

The services of "Murat" hotel are also worth a recommendation. The hotel has 61 comfortable rooms, including 1- and 2-person rooms and four apartments, also adapted for the handicapped. All the rooms are equipped with a bathroom, telephone and TV set. In every room there is also the possibility of internet connection. There is a conference centre in the hotel, equipped with standard audio-visual equipment. The hotel's restaurant offers a wide selection of Polish and international dishes. Guests also have a café, a nightclub, a stylish grill and a large guarded car park at their disposal.

Most interesting businesses

Reda is an attractive town for investors. Its main advantage is an excellent location – the road and rail transport node and proximity of the Tri-City, other towns nearby and the sea. In addition, there are many investment sites in the area of the commune, with good technical infrastructure. The natural, scenic and ecological advantages of the town are also worth noting.

Construction of the Northern Ring Road of the Tri-City urbanised area also represents a major opportunity for further balanced development and enhancing the town's value for investors. Such investment will improve communication between the north-western areas of Pomorskie Voivodeship with the Tri-City urbanised area and the rest of the country and will shift road traffic out of the centre of town, with a positive impact on the growth of tourist and investment attractions of Reda Commune.



REDA TOWN



International cooperation

Reda implements the goals of democratic, economic, social, cultural and pro-ecological development of the Baltic Sea region, through membership in the Union of Baltic Cities and the Euro-Region Baltic Association of Polish Communes.

Reda also cooperates with friendly local governments from Germany and Lithuania. In 1997, an agreement with Waldbronn commune in Germany was signed, and in 1998 with the Vilnius region local government in Lithuania. As part of these agreements we cooperate, among other things, in the area of environmental protection, culture, sport, tourism and science. Inhabitants and authorities of our partner towns meet at various town ceremonies. Current information is also exchanged between Reda and Waldbronn and published on the information bulletins of both communes. Such activities help establish direct contacts between artistic and professional organisations, as well as between children and young people.

Why Reda?

Reda is a town where people who seek quiet, fresh air and the closeness of nature settle and invest, buying plots for single-family housing, as well as apartments in multi-family residential complexes. New construction companies also invest here, one of which is SEMEKO from Gdynia, which is not only building an exquisite residential complex in Reda, but is also putting forward some interesting ideas, such as creating - in the "Przy Młynie" complex - an open air archaeological exhibition, the first in Poland, relating to the first settlements in the area of Reda, dated to approximately 8,000 BC. We are also developing tourism, creating ever more possibilities for a pleasant lifestyle in Reda. Weekend tourist attractions include bike tours, hikes and horse riding, but also canoeing down the Reda River, which is becoming increasingly popular, creating opportunities for the development of the agro-tourism and related services

Reda is a member of "Small Kashubian Tri-City" Commune Association, which supports local government, the preservation of the cultural and spiritual unity of Kashubia and popularisation and activities in ecological and environmental protection.

Membership in the "Reda and Chylonka Valley" Commune Association enables joint implementation of projects in water supply, sewage system, removal and treatment of sewage and waste removal.

As a member of Polish Towns Association, Reda is represented on both national and international level. One of the goals of the association is inspiring and undertaking joint commercial activities, influencing development and increasing the wealth of Polish towns.

Reda is also a founding member of the Local Tourist Organization "Wejherowo Land," whose aim is tourist promotion of Wejherowo County and Town.

Our people – there to help you:

Information on current investment offers is available at the town's website www.reda.pl, in the News file.

Andrzej Jaworek
Deputy Mayor of the Town of Reda

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WEJHEROWO

COMMUNE



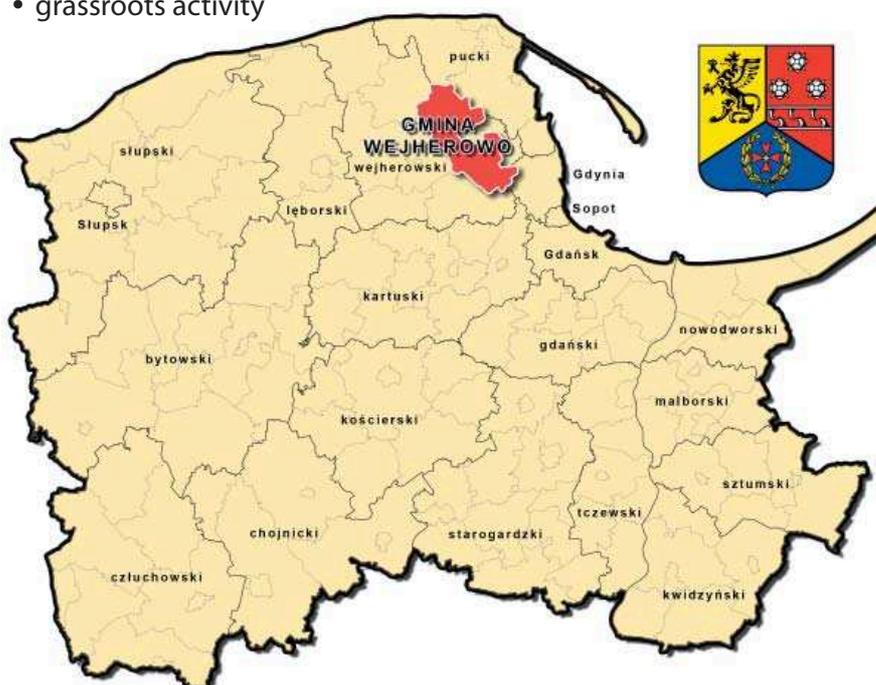
Description

Wejherowo Commune is located on three morphological units: the Kashubian Lake District, the glacial Reda-Łeba Valley and the Żarnowiec Uplands, with highly contrasting landform features. The commune is located in the northern part of Pomorskie Voivodeship, bordering the towns of Reda, Wejherowo, Rumia and Gdynia and the communes of Luzino, Szemud, Krokowa, Gniewino and Puck. An important northern communication, the Gdańsk – Szczecin highway, passes through its territory.

The commune's proximity to the Tri-City urban area means it performs a suburban function, creating the background for private housing development, leisure and recreation and the development of the production and services sectors. Due to local natural conditions and communications networks these functions are concentrated in the central part of the commune. Wejherowo Commune is a suburban-agricultural commune.

Our advantages include:

- location next to main communications routes
- proximity of the sea
- investment land
- proximity of the Tri-City
- small and medium size enterprises
- openness to new investments
- industrial plants of international importance
- waste utilisation plant
- school network
- educational infrastructure
- population growth
- dense population network
- grassroots activity



In 2006, the Wejherowo Commune Council adopted the Social and Economic Development Strategy for Wejherowo Commune, as a planning instrument for the commune's economic development. The document sets out the basic development directions of Wejherowo Commune for the period extending to 2021.

The basic functions of Wejherowo Commune are:

- housing,
- production, service and commercial activities,
- agriculture,
- forestry,
- tourism and recreation

Service and production functions are starting to play an increasingly vital role, as the commune is located on the outskirts of Wejherowo.

17,579 inhabitants live in the sixteen rural administrative units of Wejherowo Commune in an area of 19,382 hectares. The most important centres are parish and rural administrative units: Bolszewo, Gościńno, Góra, Nowy Dwór Wejherowski, Gowino and Orle. Other village administrative units include Bieszkowice, Gniewowo, Kąpino, Kniewo, and Łężyce, Reszki, Sopieszyno, Ustarbowo, Warszkowo and Zbychowo.

There are over 1,000 business entities active in Wejherowo Commune. Service and production companies dominate the economy. The commune is an interesting investment area, as a base close to Wejherowo Town and the Tri-City. It is also an interesting area for housing development.

The largest company

Name of the company: BALEXMETAL

Location: Bolszewo

Area code: 84-239

Address : Wejherowska 12 c

Telephone: +48 58 778 44 44

Fax : +48 58 778 44 45

e-mail : balex@balex.com.pl

WWW: <http://www.balex.pl>

BALEXMETAL – the company produces steel construction materials. It offers steel roof tiles, trapezoidal metal sheets, layered sheets and ZET halls. Its many years of experience have helped the company meet the high expectations of its customers. Balex Metal Company was awarded "The Construction Company of the Year 2004" title by "Construction Kaleidoscope" magazine to construction companies and organisations for its dynamic development and the position it had achieved on the construction market. On 1st December 2005, Balex Metal Sp. z o.o. also won two other very important prizes – the Polish Hercules Award and the Construction Company of the Year 2005. The prizes were granted for marketing strategy and effective company management.

BALEXMETAL has five production plants and 21 branches in the country. The company owns modern machinery production lines, ensuring ideal product parameters, confirmed by the approvals and certificates issued by the Construction Technology Institute.



WEJHEROWO

COMMUNE



Our real estate market

Wejherowo Commune is listed as a suburban commune due to its proximity of a large urban area. The urbanisation process is so advanced that it has resulted in a merging of village units, or more appropriately, suburban units. Construction activity in the commune in recent years has been related to building development.

In comparison to industry, agriculture plays a less important function in the commune. Agricultural land covers 6,268 hectares. Urbanisation in the commune is displacing its agricultural function.

Most places in the commune are connected to the water supply system. The commune's goals have been divided into strategic areas. The strategic areas are those that are vital for the commune's activity and at the same time set out the direction for the next few years. The activity of Wejherowo Commune will be concentrated on four areas:

- Ecology
- Economy and spatial development
- Infrastructure
- Community

The strategic goals are: construction of a water and sewage system, making use of the commune's strategic location, tourist and economic promotion programme, development and modernisation of the roads within the commune's administrative limits along with accompanying infrastructure, preparing spatial planning documentation, tourist infrastructure development, improving the environment, creating an efficient sewage collection system for the whole commune area, use of the natural environment's advantages for the development of agro-tourism.

Thanks to the joint effort of the commune authorities, inhabitants and representatives of community organisations, the Commune Council prepared and adopted the Wejherowo Commune Local Development Plan with the Long Term Investment Plan until 2013.

The firm grounding of the plan's preparation in the community gives a guarantee that the efforts and means directed at completion of the projects will contribute to the development of the Wejherowo community. The tasks of the plan are as follows:

- development and modernisation of roads, with accompanying infrastructure, with simultaneous support for ecologically prioritised activities, such as construction of a water and sewage system
- creating and updating the planning documentation, to provide the basis for new investments, with the use of the commune's good location and sound local regulations, facilitating SME development
- improvement of environmental conditions, with special attention to building an efficient sewage collector for the whole commune
- creating an environment better able to use human potential and support for local initiatives, as well as securing the conditions for a properly functioning health service and social security service

Wejherowo Commune has at its disposal 236 hectares of land for investment purposes. The commune offers assistance by connecting services to the site and offering tax breaks. A site of about 100 hectares is located in Gościniń, on the national No 6 highway and a 100-hectare site is located in Kąpin, zoned for a recreation area, greenery and tourism.

There are 1,148 active business entities in the commune entered in the business activity register.

The following, large companies of international importance are located in the commune: Gościcińska Fabryka Mebli KLOSE (the oldest and largest furniture factory), PORTA KMI Poland in Bolszewo, Balex Metal in Bolszewo, Eko Dolina in Łężyce.

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KOLBUDY

COMMUNE



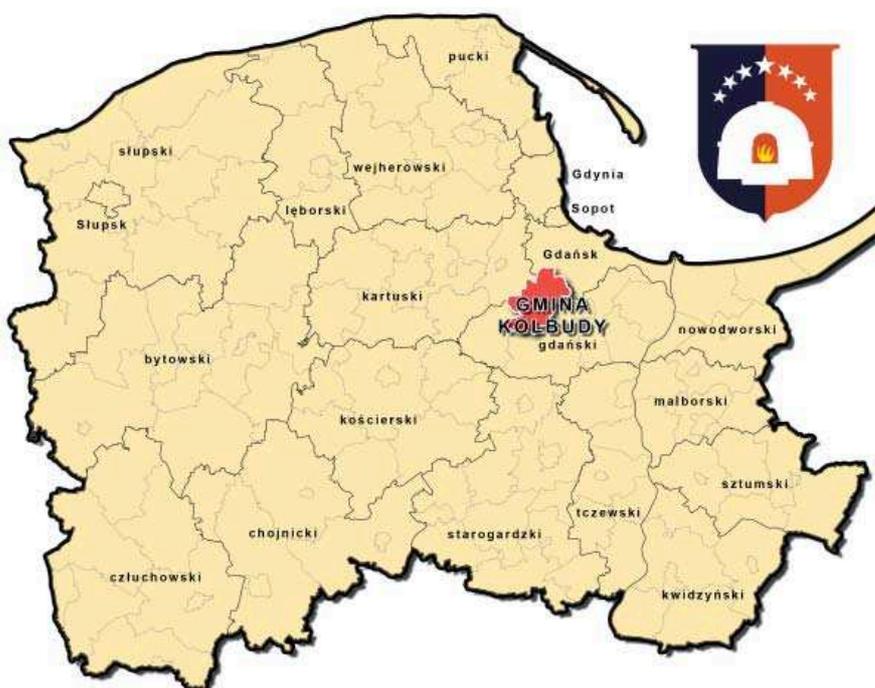
Description

Kolbudy Commune lies in the north-eastern part of Pomorskie Voivodeship, in a picturesque part of the Kashubian lake district called Szwavcaria Kaszubska (Kashubian Switzerland). It has almost 20,000 inhabitants in 15 rural administrative districts.

The landscape of Kolbudy is dominated by numerous, rolling hills and crystal-clear lakes - Otomińskie, Kolbudzkie, Łapińskie and Goszyńskie. The Radunia and Rekinia rivers flow rapidly in deep, post-glacial river valleys. In 1980 a nature reserve – “Jar Reknicy” - was created along the latter. This deep forest-covered area is like a lost, fairy-tale land. Here one can come across ancient beech trees, as well as oak and sycamore, often with over a metre in trunk diameters. The forests are some of the greatest riches of the Kolbudy Commune. A paradise for mushroom pickers, they are a shelter for numerous plant and animal species. On the edge of the forests, black storks nest in the company of cranes and herons. A well-trained eye might even spot a hawk or two. One can also encounter deer, wild boar, foxes, moose and even raccoon dogs here.

One can also admire the beauty and untouched nature of the Kolbudy forests in its numerous protected landscape areas. This is where unique woodlands of age-old trees and breeding positions of wild fowl may be found. The forests are also full of sights and mysteries, such as Bursztynowa Góra (the Amber Hill) with a nature reserve, created to protect the remnants of a local amber mine and a kurgan cemetery dated to the Roman times, and many other treasures.

Beside the beauty of the landscape, there are many interesting monuments in Kolbudy Commune. Visitors will find, for example, abundant evidence of culture and activities of ancient Slavic tribes: ruins of early Iron Age cemeteries, early Middle Ages fortified settlements and an upland fortified settlement – a defence settlement built by Pomeranian Slavs in the 9th– 10th centuries.



A church, built from fieldstones, probably by the Teutonic Knights, has overlooked Pręgowo for over 600 years. A church of a similar age can be found in Lublewo. However, this one has been burnt down twice over the span of its turbulent history and was finally rebuilt in brick by Gdańsk townsmen. The real pearl of Kolbudy is the 18th century church in Czapielsk. There is an old St. Nicolas painting in its main altar, with three girl figures, who - legend has it - found husbands thanks to the helpful saint's aid.

So-called 'water castles' are also among the commune's main sights. This is a colloquial name for the hydrotechnical constructions on the Radunia River. Among them is over a century old hydroelectric power station, which despite its old age is still operational. It is worth noting that the whole staircase lock of Radunia – 8 power stations cooperating with one another- is unique in Europe.

There are many hotels and holiday centres in the commune. Agro-tourism is becoming increasingly popular as well. Well-developed sports and recreation infrastructure (tennis courts, sailing boats marina and horse studs), good shopping offer, convenient access and the proximity of the Tri-City make Kolbudy Commune a popular tourist destination.

Most interesting businesses

There are over 1,000 business entities registered in the commune, though none of them are intrusive. The main part of the Kolbudy area lies within the protective zone of the Gdańsk drinkable water intake area and is as such an area of non-toxic industry. The business sector of the commune is varied in terms of scale and type of production. Among the many enterprises of supra-local importance (Browar Amber, Zakłady Mięsne Nowak, Ziaja Pharmaceutical Plant), the first two are, without a doubt, the best examples.

Browar Amber (Amber Brewery)

The beer brewing tradition in Bielkówek reaches back to the 17th century, when monks from Kartuzy built the first of three breweries there.

At the start of the 1990s, Andrzej and Danuta Przybyło traced its roots. The first beer was bottled on 24th November 1994. From that moment on the brewery started to develop rapidly. The products of the Kolbudy brewery took over a substantial part of the local beer market and the quality of the Amber production is certified by numerous prizes. Beer in Bielkówek brewery is produced by ultramodern equipment from the world's best producers. Such methods are not used by the global breweries, who tend to prefer mass production, i.e. brewing a high extract beer (14.5%), which after fermentation and maturing is diluted during bottling to the required extract level. On the other hand, in the traditional method used by the Amber brewery, every type of beer is brewed separately. Amber produces beer from dark and pale barley malts, adding three kinds of hops. The water used for production is taken from an the company's own drilled well. The deep knowledge of master-brewers, the traditional methods and ingredients they use and the unpolluted brewery surroundings are the source of the unique rich taste and the bouquet of the beer brands produced in Bielkówek.

KOLBUDY



COMMUNE



Zakłady Mięsne "NOWAK" (meat processing factory)

Zakłady Mięsne "NOWAK" has been present on the market since 1991. From the beginning of the factory great attention was paid to product quality. Zakłady Mięsne "NOWAK" cooperated with proven cattle and pig breeding farms. To meet growing customer requirements and those of the European Union, the company is constantly modernizing its machinery. Implementing the HCCAP system allows for a uniformly very high quality of products. The proof of the product quality and high production standards is the Quality Management System Certificate in accordance with EN ISO 9001 regulations, issued by German TUV CERT. The factory's strength also lies in its team of specialists, with many years of practice in production of charcuterie based on traditional recipes, with the use of modern technological solutions. Thanks to this, Zakłady Mięsne "NOWAK" has become one of the most modern meat processing factories in Pomorskie Voivodeship. The company's name and logo are associated with reliability and quality of offered products. Currently, the products of Zakłady Mięsne "NOWAK" are sold in northern and central Poland. In the Tri-City area the company has its own factory outlet network, widely recognised by clients.

The offer includes about 80 kinds of charcuterie, from traditional berliners, to poultry, the 'krakowska' sausage, which has been awarded many times over, and was recently awarded the "kabanosiki natalki" award. The whole assortment of beef, pork and offal is produced here. Zakłady Mięsne "NOWAK" has the authorisation to export its meat and charcuterie to European Union markets and to the numerous countries of Eastern Europe. The products with the "NOWAK" company logo have been awarded in numerous food competitions and fairs, both in Poland and abroad.

International cooperation

For almost five years Kolbudy Commune has been cooperating with the town of Uffenheim (Germany). Among many areas of activity, youth exchange is a priority in the contacts with Uffenheim. Every year, several dozen pupils from Kolbudy schools visit Uffenheim. The cooperation of Kolbudy and Uffenheim will shortly be formalised by signing of a partnership agreement. Over the last year Kolbudy Commune has also established contacts with the towns of Pratovecchio (Italy) and Egletons (France).

Our real estate market

The area of the Kolbudy Commune has for many years been an attractive site for various kinds of investment and many undeveloped sites are still available. Kolbudy Commune has drafted a complex vision for its future development. It is a balanced "rainbow" scenario charting the process of integration of Kolbudy Commune with the Tri-City, as its recreational and housing base. The number of jobs will also grow. Production plants and service and commercial establishments will be a vital element of the economic complex of the Gdańsk Metropolitan Area. Agriculture will probably still make up about 20% of the commune's economic potential, although mostly in the form of agro-tourism and production of health foods for the local market. Large sports and recreation centre will also probably be built for Tri-City inhabitants. At the same time, the main part of the commune's area will maintain its rural, forested and lake district character. The commune still has great developmental potential. There are sites close to the Tri-City Ring Road earmarked for development waiting for investors.

Our people – there to help you:

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Description

Kosakowo Commune is a rural commune with an industrial-agricultural-tourist character. It covers area of over 50 sq km and is located in the north-east of Pomorskie Voivodeship. In the north we border on Puck Commune, the natural eastern border is the Baltic Sea coastline. From the southern and western sides we border on the urbanised areas of Gdynia and Rumia. We have attractive investment sites – 120 hectares of the commune's land is earmarked in the local zoning plans for industry and services - and 145 hectares for warehouse and utility buildings. We are a dynamically developing commune aiming to attract new investors, and as such, have on numerous occasions won awards in national rankings (local press, Rzeczpospolita daily paper award and the Wspólnota weekly magazine award). We hold the titles of "Fair Play Commune 2005" held by the National Economy Chamber and "HIT of the year 2005 and 2006" – for the development of rational programmes and successful creation of conditions that enhance the commune's attractiveness for tourists and investors.



Our advantages include:

- efficient and well-developed public transport,
- rich deposits of good quality underground water,
- possibility of using gas installation,
- well-developed industry and crafts,
- high migration surplus,
- favourable age structure of the inhabitants,
- planned construction of the northern ring road of the Tri-City urban area, and extension of Kwiatkowskiego highway to the Tri-City ring road,
- the currently being considered adaptation of the of the Polish Navy Airport in Gdynia to the needs of civil aviation,
- good soil and water conditions for construction development,
- high percentage of adopted local zoning plans (for circa 80% of the area),
- friendly attitude of local authorities for investors, as well as the help of Municipal Council employees in arranging the necessary formalities.

In 2000, Kosakowo Commune council adopted, together with the other communes of Puck County, the Economic Development Strategy for the Puck Area as a programming instrument for commune's economic development. The document outlined basic development directions for Puck in the next few years:

"Good conditions are created for investors thanks to the location, natural characteristics, developed economy and the friendly attitude of the local government. Economic development is harmonised with the protection of the rich values of nature, the landscape and cultural heritage."

The area of Kosakowo Commune, as well as the adjacent part of the Bay of Puck, have many unique natural characteristics. In the warm and shallow waters of the basin the rich life of underwater meadows blossoms. Along the seacoast one will find interesting flora and waterfowl and marsh bird sanctuaries. The area is partly protected within the Maritime Landscape Park.

The northern part of the commune is located in an area marked for environmental protection as a coastal ecological corridor of supra-regional importance. The commune's area is exceptionally attractive for tourists all year round, due to its clean beaches, wonderful landscape, its unique topography and rich nature. In Rewa we have the best conditions in Poland for windsurfing as well as for other water sports.

Besides this, as a part of the tourism development of the commune, construction of a yacht port is planned in the next few years, making the Bay of Puck even more attractive for small boat sailing and motorboats. The project also includes places for small tourist and sports boats in the winter. The yacht port should be able to service boats of a berth of up to 2.5 m. This will meet international standards and will definitely complement the Polish yacht ports network on the Baltic Sea.

The commune's villages are settlements with centuries of tradition. As long ago as the early Middle Ages the fishing harbours in the villages of Mecheliniki and Rewa existed with their inhabitants engaged in fishery and ship building. These traditions have survived till present day. Boats, cutters and fishing nets are inseparable elements of the landscape. Fishermen's families, with strong ties to regional traditions, speak the characteristic Kashubian dialect.

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Most interesting businesses

Kosakowo Commune uses its natural advantages and geographic location and boasts a broad spectrum of developing business activities – from production to tourism. We can give the following examples of businesses active in our area:

VTS – a company producing air-conditioning and ventilation control centres. It offers the highest quality products and solutions, from design, through the production process, to distribution and client care. VTS was established in 1989 in Kosakowo, where its main office is located until today. Today it employs over 600 employees in 54 branches in 19 countries.

After strengthening its position on the European continent it broadened its market to the Middle East and some regions of Asia and the Pacific. It has three Logistics Centres in the main markets: Central Europe – in Poland, Eastern Europe- in Russia, Asia and the Pacific – in China. VTS's products are installed in the offices of many known companies, e.g. VOLVO, GAZPROM, McDonald's, TESCO, CARREFOUR, EXPO FAIR, COCA-COLA, PEPSI, SIEMENS, MITSUBISHI, AHOLD, LEGO, SAGEM, NESTLE and many others.

MASTPOL Yacht Rigging s.c. – one of the largest companies in Poland producing yacht rigging elements from aluminium and stainless steel, supplying the largest European yacht shipyards. Employment and the company's turnover grow by an average of 25-30% a year. Today, Mastpol has 5000 sqm of production floor and employs about 100 people. The majority of its products are made under the supervision of maritime control societies, such as Germanischer Lloyd and Polski Rejestr Statków (Polish Ship Register). It is worth adding that it is one of the few companies in this sector to have the CE mark for production of fuel tanks installed on sailboats and motorboats.

Our real estate market

Kosakowo Commune has mainly low-density housing typical for suburban areas. The process is so advanced that it has resulted in a merging of rural, or rather suburban, units with the prevailing building development being single-family housing. Construction development in our commune in recent years has evolved in this direction. Most of the investments have been made in Pogórze and Mosty. A very high percentage of investors are not inhabitants of our commune. Population growth dynamics are very high, the highest in comparison to other rural communes in Pomorskie Voivodeship.

Agriculture plays a less important function in the commune than industry. Farms are usually small. Arable land constitutes about 50% of the commune's area, but is falling. The soils in the commune are exceptionally clean, not being polluted by heavy metals.

Development of the urbanisation process on the commune's territory is displacing its agricultural function, especially in the areas closest to Gdynia and in the belt along the Rewa – Mosty – Pierwoszyno – Kosakowo – Pogórze road.

All parts of the commune have water and gas supply and we plan to finish sewage system construction in 2007. Our strategic goal is to create conditions that will enable provision of sanitary sewage systems for apartments and sewage disposal and treatment with a high standard of service and environmental protection; with the development of public utility infrastructure.

Through the efforts of the commune's authorities, with the cooperation of inhabitants, representatives of grassroots organisation and administration and business representatives, the **Local Development Plan for Kosakowo Commune** for 2004-2007 was drafted and adopted by the commune's council. The broad participation of the public in the preparation of the plan guarantees that the efforts and means directed towards the projects will result in the commune's development, as is desired by its inhabitants. The tasks contained in the plan aimed at improving local conditions include:

- changes in the economic structure of the area, including modernisation of the commune's water supply system,
- changes in land development – including development of the coastline,
- development of the transport and infrastructure systems – including improvement of roads, development of street lighting, construction of a communal sewage collector system,
- improvement in the condition of natural environment - providing a sanitary sewage system for all housing and sewage disposal and treatment with a high standard of service and environmental protection.

The plan also assumes the following list of tasks for 2007-2013:

- improving living conditions and quality of life of inhabitants,
- creating an attractive offer for potential investors intending to locate their business in the commune (which would have a positive influence on the employment rate growth in the region), creating easier investment and faster development opportunities in the area of the regional transport corridors.

In the current zoning plans there are about 120 hectares earmarked for industrial and services development, 80 hectares earmarked for a possible container warehouse for Gdynia port, 65 hectares earmarked for possible storage and utilities buildings or non-intrusive industry. Private individuals mostly own these sites.

You can find more details on our investment offer on our website:
<http://www.kosakowo.pl/podstrona/fair/oferty.html>.

Our people – there to help you:

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