

POMORSKIE REGION

background information



POMORSKIE IN FIGURES

Population	2.23 m (5.9% of Poland's population)
Area	18,300 km ² (5.9% of Poland's area)
Major economic centre	Tri-City (Gdańsk, Gdynia, Sopot) Metropolitan Area (population nearly 1.2 m people)
GDP (2009)	17,618 m EUR (5.6% of Poland's GDP)
GDP per capita (2009)	7,900 EUR (5th place in Poland)
exports per capita (2011)	3,750 EUR (5th place in Poland)
unemployment rate (2012)	12.5%
SMEs (2011)	258,000 (95.3% are micro companies)
private investment (2011)	1.8 billion EUR annually (excl. micro companies)

Cargo handling in seaports (2011)	Gdańsk: 25.3 m tonnes Gdynia: 15.9 m tonnes
Lech Walesa Airport Gdansk (2012)	50 regular connections 2.9 m passengers
Universities (2011)	28 (including 9 public)
Students (2011)	105,000
R&D employees (2011)	7,700 (in 23 entities)

GENERAL ECONOMIC SITUATION

In terms of size and strength, Pomorskie is an average economy with a relatively stable position in relation to other Polish regions. Pomorskie boasts high levels of economic activity with a big number of SMEs per one thousand population. The majority of SMEs are in the Tri-City Metropolitan Area. The economy of the region, both in terms of employment and value created, has a service orientation but maintains a strong position of certain industries.

In 2007-2010 Pomorskie Region was number 6 in Poland for Foreign Direct Investment (FDI) – with a total of EUR 2.6 billion and number 4 per capita.

Selected recent FDIs

COUNTRY	INVESTOR	SECTOR
Australia	Macquarie Group	Marine & logistics
Belgium	Sea Invest Polska	Marine & logistics
China	Hutchison Port Holdings	Marine & logistics
France	SII	ICT
Germany	Bayer	Finance
	Lufthansa Systems Poland	ICT
Ireland	Fineos	ICT
	Kainos	ICT
Norway	Nevion Manufacturing	ICT
	Rolls Royce Marine Polska	Marine
Philippines	International Container Terminal Services, Inc.	Marine & logistics
Sweden	Relacom	ICT
	Skanska	Construction
United Kingdom	Misys	ICT
United States	Acxiom	ICT
	Compuware	ICT
	Delphi	Automotive
	Eaton	Automotive
	Flextronics International Polska	Electronics
	IBM	ICT
	Intel Technology Poland	ICT
	Jabil Circuit	Electronics
	Sony Pictures	ICT and Finance
Thomson Reuters	Analytic Services	

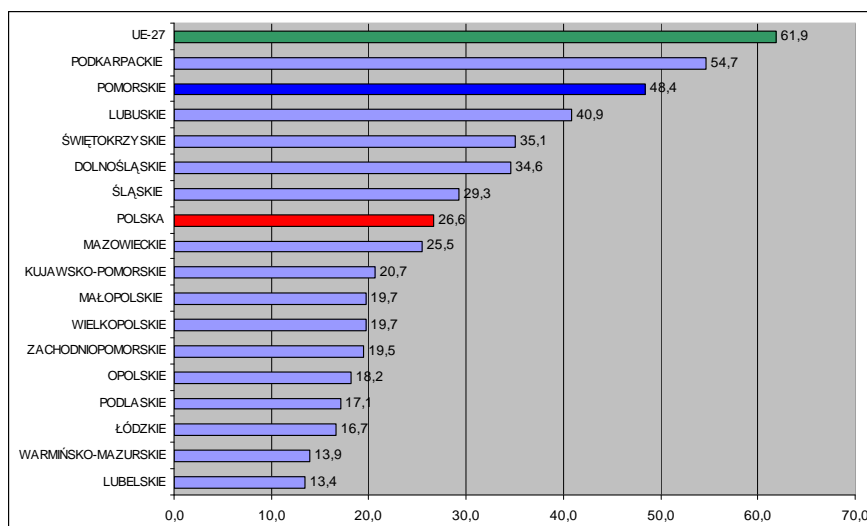
The region's major industries include **marine, petrochemical, electrical engineering, wood and furniture, food and tourism industry**. The seaside location creates a number of economic opportunities for the region involving the use of marine resources. It also fosters cooperation in the Baltic Sea Region in areas such as the economy, administration, culture and infrastructure.

GROWTH & INNOVATION POTENTIAL

Sectors with the biggest growth potential in the region include in particular: **ICT, energy, logistics, business services, light chemistry** (pharmaceutical & cosmetics industry), **biotechnology, off-shore technologies** and **creative industries**.

ICT	Pomorskie is a front-runner in this area; it is number one in the industry classification ranking in terms of the number of FDI projects completed worldwide in the years 2005–2009;
pharmaceutical and cosmetic industry	a high concentration of the pharmaceutical industry in Pomorskie; expected to attract significant foreign direct investment;
logistics	seaports are an asset which makes logistics one of the priority industries;
off-shore technologies	good conditions for dynamic growth due to the characteristics of the region, availability of marine resources; high value added and job creation potential;
energy	key to the functioning of the society and the economy; underinvested and underdeveloped; demand for investments in this sector, both in transmission networks, conventional energy, nuclear and wind power for which there are very good natural conditions in the region;
business services	relatively high supply of finance and IT specialists, good command of foreign languages on the national scale, and the prevailing opinion about market saturation in other regions constitute the strength of Pomorskie;
creative industries	high value added and job creation potential; good conditions for dynamic growth.

A positive feature of Pomorskie is the gradually increasing and relatively **high share of the private sector in financing R&D** (48.4% of total R&D expenditure). But there is too little awareness of the impact of R&D on innovation and competitiveness accompanied by not always adequate offer of commercial R&D institutions. Consequently, infrastructure potential is not fully used, which turns into comparatively low transfer of knowledge and technology to the economy.

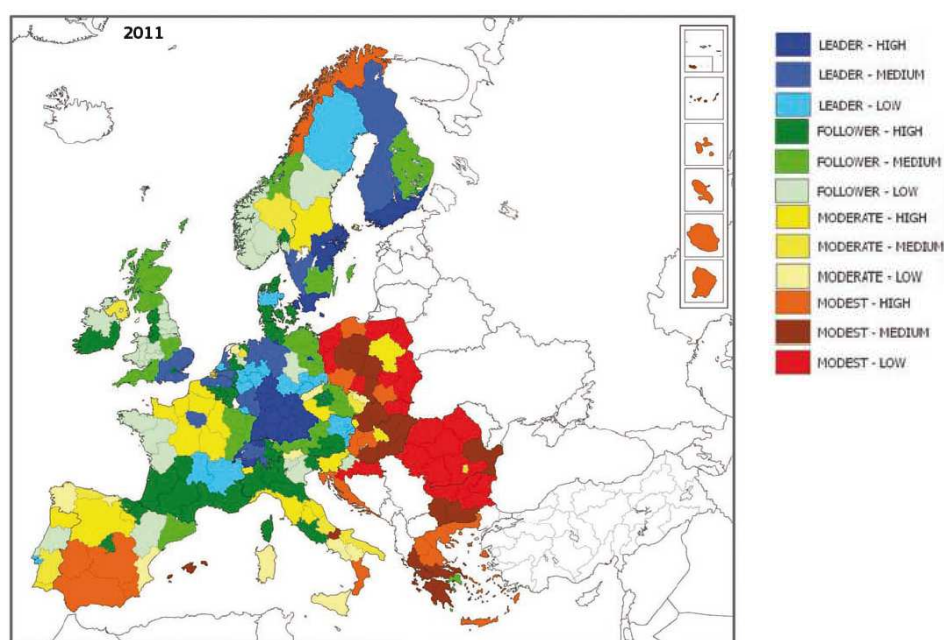


Business
R&D expenditures
in total
R&D expenditures
(2010)

Source: Eurostat, NSO

Regional Innovation Scoreboard 2012 classified Pomorskie in *modest-high* group, meaning the region is a modest innovator (*Regional Innovation Index*), but achieves the best results in this group.

RIS performance map



CLUSTER POLICY

The Pomorskie Regional Board has set a high priority for improving competitiveness of the region by supporting cluster development. In order to strengthen the weight and significance of the cluster support policy the **Pomorskie Regional Programme for Cluster Support 2009-2015** was adopted. Commercially strong clusters engaging a wide spectrum of actors are in focus of this Programme.

The most important part of the Programme is selection of **key clusters** via a **competitive procedure**. Selection criteria were the following:

- **Capacity and competitiveness of cluster** (40%)
(e.g. contribution to regional exports);
- **Development strategy** (40%)
(e.g. complexity of approach, feasibility studies for projects, financial resources);
- **Quality and scope of partnership** (20%)
(e.g. min. 30 enterprises, R&D actors' involvement, openness to new entities).

Preferences were provided for selected key clusters in calls for proposals under EU programmes at regional level. Support was directed mainly at projects operated by cluster coordinators and dealing with cluster development (e.g. networking, transfer of knowledge, strategic investment planning). Preferences were also available for infrastructure (e.g. R&D investments in enterprises, technical facilities in incubators) and “soft” projects (e.g. training and consulting for innovative companies) focussed on key clusters.

Key clusters selected so far are presented below

Name	No. of Enterprises	R&D actors	Others	TOTAL
Pomeranian ICT Cluster	113	4	12	129
The Baltic Eco-energy Cluster	72	10	25	107
The Gdańsk Construction Cluster	52	5	4	61



Pomeranian ICT Cluster

www.pomorski-klaster-ict.pl

main areas of activity: IT services (production of software, databases and tools for their processing), telecommunication services, electronics (manufacture of electronic products and components).



The Baltic Eco-energy Cluster

www.bkee.pl

main areas of activity: biomass, sun cells and PVC, wind energy, hydro-energy, poly-generation, fuel from waste, passive housing, hydrogen energy, heat pumps.



The Gdańsk Construction Cluster

www.gkb.com.pl

main areas of activity: industrial and infrastructural construction, low-energy construction.

It should be also noted that **Pomeranian Group for Cluster Competence has been established** to develop activities of cluster leaders and animators from Pomorskie. The mission of the Group includes preparing a coherent framework for cluster policy, a tool for creating economic growth of the region.

BUSINESS SUPPORT ORGANISATIONS

Smart specialization will be not only based on cluster initiatives, therefore the role of other institutions will be crucial. In Pomorskie there are many widely-defined business support organisations. This applies in particular to:

- Science and Technology Parks / Centres of Technology Transfer / Centres of Excellence
- Business Incubators
- Foundations and Associations
- Employment Offices

Science and Technology Parks / Business Incubators in Pomorskie

	Pomerania Science and Technology Park www.ppnt.gdynia.pl		Centre of Excellence ChemBioFarm Faculty of Chemistry, Gdańsk University of Technology www.biotechnologia.pl
	Gdańsk Science and Technology Park www.gpnt.pl		Education & Implementing Centre in Chojnice www.cew.bizneschojnice.eu
	Gdańsk Business Incubator STARTER www.inkubatorstarter.pl		Cierznie Business Incubator www.perlowainwestycja.pl
	Słupsk Business Incubator www.sit.slupsk.pl		Pomeranian Special Economic Zone www.strefa.gda.pl
	Kwidzyn Science and Technology Park www.kppt.pl		Słupsk Special Economic Zone www.sse.slupsk.pl
	House of the Entrepreneur www.dp.tczew.pl		

Many of the BSOs got public support from the EU funds (infrastructure and “soft” support). Necessarily there is a need for a closer cooperation amongst the BSOs to trigger critical mass and to achieve better results in implementation of innovative solutions in regional economy.

SMART SPECIALISATION IN “POMORSKIE 2020” STRATEGY

POMORSKIE 2020 Strategy was updated in 2012, mainly due to present and future strategic **CHALLENGES** faced by the region, which are e.g.:

1. Effective **co-operation of the research sector with the business sector**, better conditions of development of **export-oriented companies and business clusters**, as well as an increase in **investment in sectors with the greatest potential for growth based on the specific potentials of the region** (*Economic links challenge*);
2. Improvement of the quality of education at all levels, including the signals from the labour market and the **effective use of scientific potential of the universities in Pomorskie to make them more competitive in the national and international arena** (*Educational services & competitiveness of universities challenge*);
3. An **increase in employment of residents of all ages**, as well as improvement of the public health for better use of the potential resulting from extending of life (*Employment & population health challenge*);
4. Exploiting the potential of existing resources to improve **the security of energy supply and better management of energy demand** (*smart grids*), as well as reducing the environmental impacts of energy and transformation of the region into a national leader in the production of green energy and eco-efficient technologies (*Energy security & environmental technologies challenge*).

The above-mentioned challenges determine the choice of strategic and operational **OBJECTIVES***

MODERN ECONOMY	ACTIVE RESIDENTS	ATTRACTIVE SPACE
High performance of enterprises	High employment level	Efficient transport system
Competitive higher education	High level of social capital	Energy security and efficiency
Unique tourist and cultural offer	Effective educational system	Good environmental status
	Better access to health services	

*operational objectives linked directly with smart specialisation are marked **yellow**

The objectives mentioned above are supported by horizontal implementation **PRINCIPLES** of POMORSKIE 2020 Strategy, which include the following “smart-related” principles:

1. **The principle of focus on innovation** means that the Strategy should foster innovation and creativity in different sectors and fields. It is both about an innovative approach to drive business processes, as well as about the popularisation of new technology solutions (such as *smart grids*, eco-technology) and social solutions, including those related to education and the labour market;

2. **The principle of smart specialization** means that the implementation of the Strategy should focus on start-up or use of the economic potential of these industries which are considered important for the economy of the region. The implementation of this principle means that a mechanism to identify and verify sectors with the greatest growth potential, which determine the future competitive position of the region, will be launched in the region, which will enable flexible customization of possible public intervention to changing circumstances, especially international ones;
3. **The principle of digital dimension** means that the Strategy will respond to the challenges of building the information society, which involves the popularisation of digital technologies and services, particularly with enhanced digital competence of residents, businesses and institutions.

REGIONAL STRATEGIC PROGRAMMES (RSP) are going to be the main implementing tools for POMORSKIE 2020 Strategy. It is expected there will be six RSPs covering the whole thematic range of the POMORSKIE 2020 Strategy. They will be the primary point of reference shaping different development funds in the region, including those of Cohesion Policy 2014+.

Relation between “smart-oriented” operational objectives of POMORSKIE 2020 Strategy and corresponding RSPs is the following:

RSP/operational objective	High performance of enterprises	Competitive higher education	High employment level	Energy security and efficiency
RSP Economic development	X	X		
RSP Professional and social activity			X	
RSP Energy sector and the environment				X