



Destination **NORDA**



NORDA
PÓLNOČNY BIEGUN WZROSTU



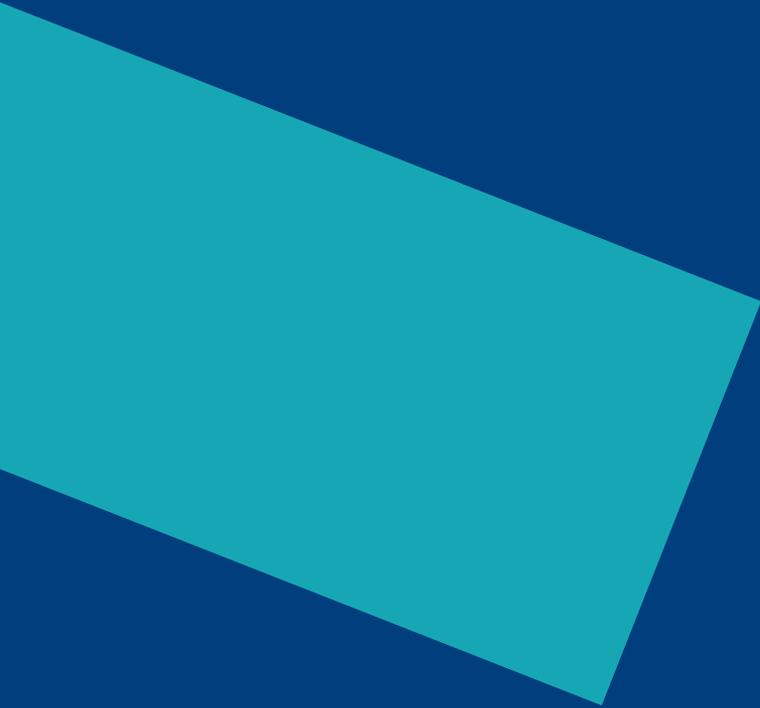
Stilo Lighthouse, Choczewo municipality

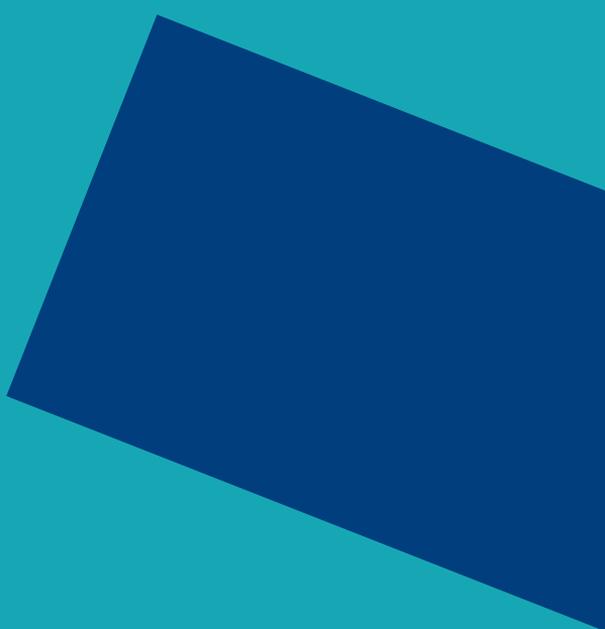
Cover – top: Skydiving and parachute jumping over the Hel Peninsula,

middle right side: Taking a walk on the Gdynia Modernism Route, middle left side: XIV Volvo Gdynia Sailing Days

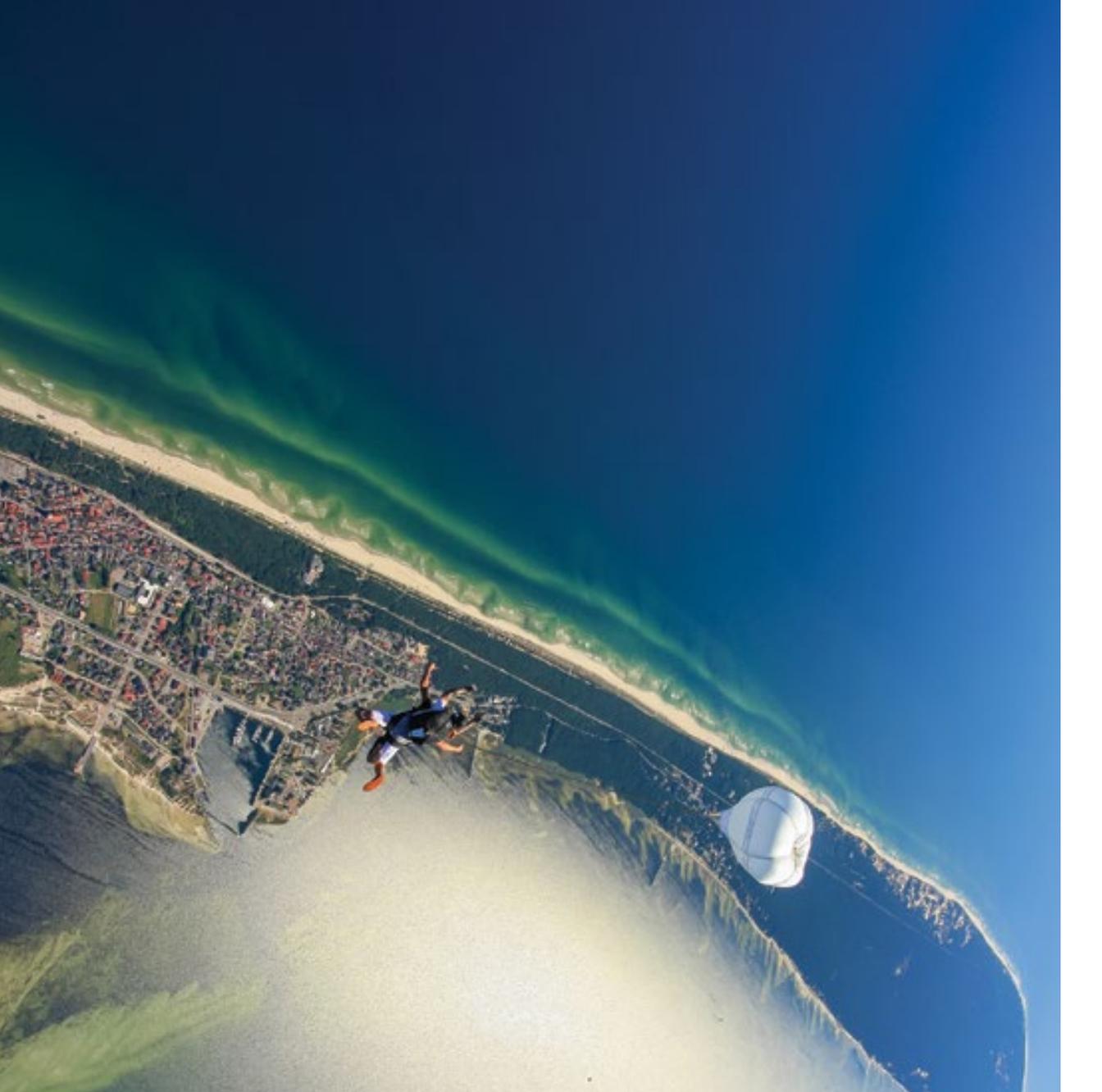
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DESTINATION NORDA



The goal of the Metropolitan NORDA Forum (an alliance of Poland's northern communes) - hereinafter called the NORDA Forum – is a steady development of the sub region in all spheres of its economic activities, promotion of the area's primary branches, among them tourism, as well as bringing satisfaction and ensuring quality of life conditions for the residents.

Foreword

The Northern Kashubia is one of the most distinctive and recognizable regions in Poland due to its truly unique location, the richness of local culture, attachment to tradition, the exuberance of its nature and breath-taking views. In order to make the most of these values, and further the development of the whole area, in 2011 the representatives of fifteen Polish northern communes agreed to a co-operation agreement calling to life the NORDA Forum. They committed themselves to build a common, integrated policy in the field of municipal economy, a common development strategy, with an emphasis on activities integrating education, tourism and safety issues.

The first municipalities to notice the benefits of this co-operative work were: Choczewo, Gdynia, Jastarnia, Kosakowo, Krokowa, Łębork, Luzino, Łęczycze, Reda, Rumia, Szemud, Władysławowo, the city and commune of Puck, and the city and commune of Wejherowo.

The benefits of sharing experiences, and co-operation in fields of economic activity which necessitate common solutions over particular interests of one commune soon attracted other local authorities.

Today the NORDA Forum consists of twenty four members and the number of joint activities and joint projects is steadily growing. In recent years the following municipalities have joined the NORDA Forum: Cewice, Gniewino, Hel, Liniewo, Wicko, Szemud, Łeba, Karsin, and Przywidz.

Local authorities of the NORDA Forum undertake joint actions promoting tourism and the sub region's economy: common activities on behalf of the transportation system; purchase of electricity and natural gas resulting in budget savings, and rationalisation of waste disposal solutions.

The goal of the Metropolitan NORDA Forum (an alliance of Poland's northern communes) - hereinafter called the NORDA Forum – is a steady development of the sub region in all spheres of its economic activities, promotion of the area's primary branches, among them tourism, as well as bringing satisfaction and ensuring quality of life conditions for the residents.

The twenty four northern communities offer today a compatible proposal for spending leisure time throughout the year. In the year 2016 the initiative has been recognized by the Chairman of the Pomeranian Regional Tourism Organization and awarded during the celebration of the World Tourism Day distinguishing NORDA Forum in the category of sub regional territorial marketing.

Each year the summer holiday season is inaugurated with a press conference respectively in every municipality.

Location and transport accessibility

The area of NORDA Forum, as well as of the whole Pomeranian province, is distinguished by its favourable location on the southern coast of the Baltic Sea. Geographically close to other countries of the Baltic Sea Region, having a wide network of air and sea connections with countries of the Baltic Sea the area is naturally predestined to maintain with them strong economic relations.

Additionally, municipalities of NORDA Forum enjoy the benefit of the proximity of two Polish major international sea ports of Gdynia and Gdańsk.

The NORDA Forum municipalities are located in close vicinity or directly in the Baltic-Adriatic Core Network Corridor [BA], a transportation channel of international importance.

This corridor is a key element of the Trans-European Transportation Network [TEN-T], and one of ten priority transport corridors of the European Union. It begins in Pomerania [in Gdynia], connects Warsaw, Katowice, the Czech Republic, Slovakia, Austria, Slovenia, and ends in northern Italy [Trieste]. The TEN-T concept is based on the development and integration of

unified, high technical parameter transport routes, including rail, land and water ways, as well as the location along them of transport hubs. Additionally, the NORDA Forum area is superbly connected with the Scandinavian region, among other by the Gdynia - Karlskrona sea motorway.

The Polish part of the corridor are: the motorway A-1, the E-65 rail way [Gdynia - Warsaw - Zawiercie - Katowice - Zabrzydowice], and C-E 65 [Gdynia - Tczew - Chorzów Batory - Tychy - Bielsko-Biała - Zwardoń]. In coming years areas located within sufficiently close range of the corridor will provide attractive investment opportunities for e.g. logistic centres, intermodal terminals and special economic zones.

The road connectivity of the NORDA Forum region is above all facilitated by the A1 motorway, which connects the north of Poland with its central and Silesian regions. This route connects with the A2 motorway creating a fast link to Warsaw and the south-west border of Poland. The coming years will bring an even more developed road connectivity to the region. The S7 motorway, which is presently being modernised, will significantly decrease the time needed to reach the capital of the country and eastern Poland. On the other hand, the planned construction of the S6 expressway will improve communication with the western parts of the country. From the point of view of the NORDA Forum municipalities the most important elements of this investment are:

the Metropolitan Bypass and the so-called Kashubian Route which will connect Łębork with the Tricity Bypass.

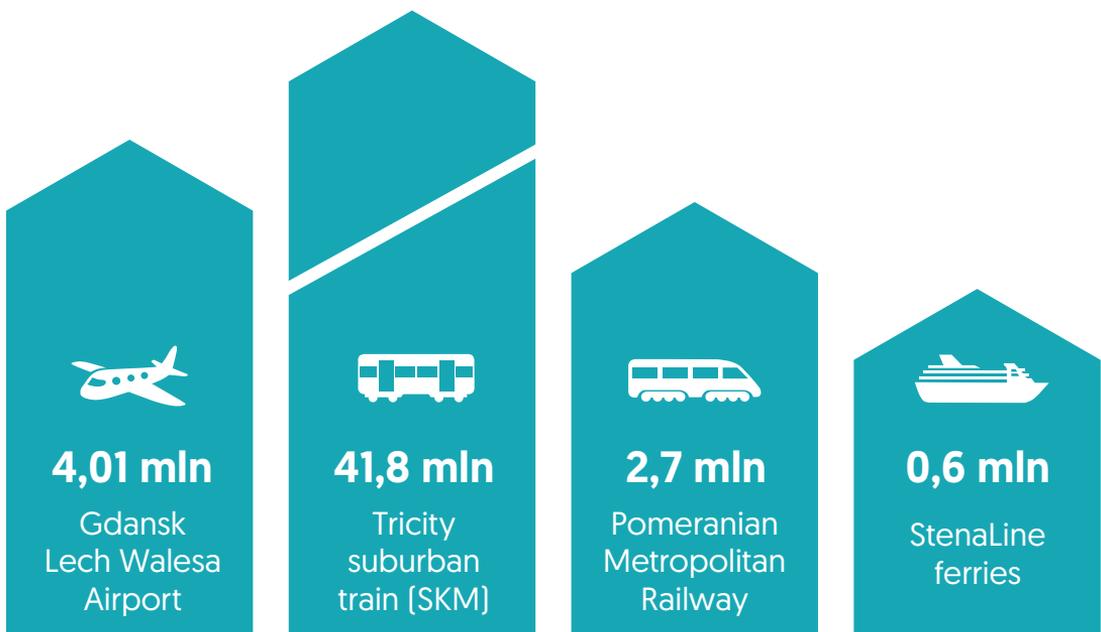
Major infrastructural investments have taken place in the region during recent years. One of the key projects from this period is the modernisation of the Tricity-Warsaw railway line. Now it takes only 3 hours to reach the capital from Gdynia. Rail transportation now plays a key role in the transportation system of the NORDA Forum area, mainly due to the Tricity Suburban Train. The train enables the people of Wejherowo, Reda, Rumia and other locations rapid access to Gdynia, Sopot and Gdańsk. We also need to mention the fairly recently built, latest rail route in Poland, the Pomeranian



Pomeranian Metropolitan Railway

Metropolitan Railway which among other also connects Gdynia, and through her also the other Norda municipalities with the region, especially areas away from its core, and with the international Gdansk Lech Walesa Airport. It is the third largest airport in Poland, only Warsaw's Okęcie and Cracow's Balice are larger. In 2016

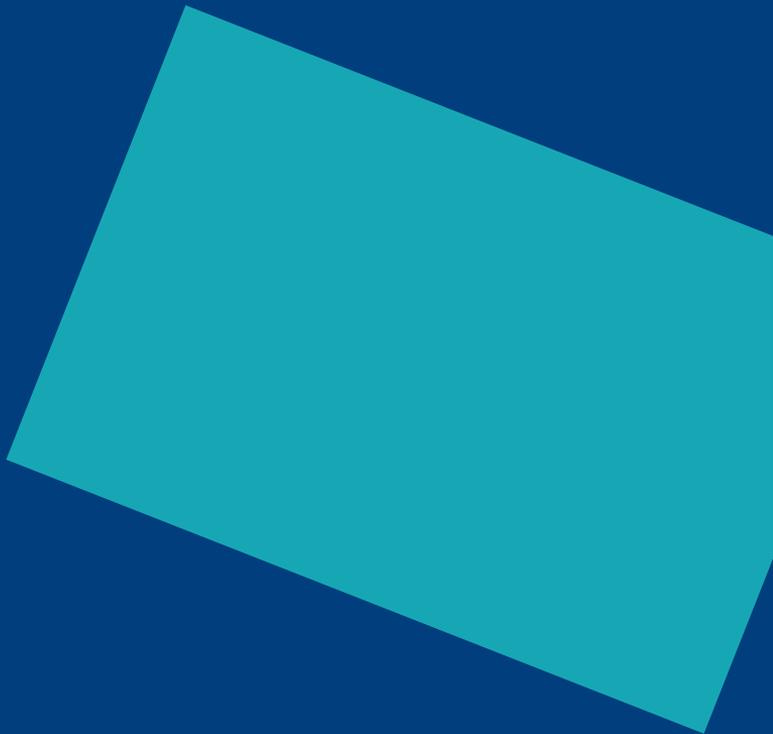
for the first time in history the airport has served 4 million passengers. The growing airport traffic translates into both tourism promotion and investment in the region, especially in modern services for the business sector (e.g. BPO, ITO, KPO).



Number of passengers for chosen transport modes in 2016

Source: Developed on the basis of data obtained from the Civil Aviation Office, PKP Szybka Kolej Miejska w Trójmieście (SKM), and the Port of Gdynia Authority S.A.

The NORDA Forum municipalities enjoy a unique advantage having regular ferry connections with the Scandinavian region on the Gdynia-Karlskrona sea route. They also have a wide choice of sightseeing and entertainment cruises.



**NORDA Forum
– a model for regional
co-operation**

The background is a solid teal color. There are two dark blue geometric shapes: a triangle on the left side and a larger trapezoidal shape on the right side, both pointing towards the center.

Cohesive marketing communication

The image-related effects of the efforts of the NORDA Forum municipalities are a result of a cohesive and complex marketing strategy. A clear NORDA logo, a website with descriptions of the present projects (www.nordafortum.pl), promotion of the Forum's plans and achievements in the media, the organisation of conferences and workshops with NORDA and media representatives all add up to create a strong brand which becomes more and more credible with each cyclical project. Each year the team for NORDA promotion creates a promotional plan for tourism and economy both for Gdynia and Northern Kashubia region. All municipalities have delegated their experts to the team in order to develop projects and initiate new activities. The promotion of the region as the best place for relaxation includes the preparation of information materials both for tourists and the citizens of the region.

Their aim is to facilitate information flow and to promote the region among locals. This develops weekend and regional tourism. The citizens of Gdynia visit smaller cities and the people from neighbouring communes take part in events in Gdynia [e.g. the Open'er Festival, the Film Festival, the Cudawianki festival, the Maritime Days]. A common event calendar is published with events and information on summer activities. The NORDA Forum also creates maps with local sightseeing locations and places of interest. For tourists' convenience a mobile "Gdynia and the Northern Kashubia" application has been prepared. It provides users with a list of the nearest cultural and sports events and lately has been also expanded to include data concerning cycle routes of the region.



NORDA Forum local authorities meeting in Wejherowo



Hydroelectric plant in Żarnowiec, Krokowa municipality

Joint activities and projects

Twenty four municipalities of the Pomeranian province have joined forces to create better conditions for the development of tourism and the economy, as well as upgrade the transportation system in the area of Gdynia and the Northern Kashubia. One new idea, using the benefits of the Forum's location and its present infrastructure and objects, is the facilitation of the health and wellness sector, which could be a foundation for the development of health and the so-called silver tourism, one of the most dynamically expanding tourism sectors in Europe.

Branding and sector projects

The international conference on the “Perspectives for the development of the health industry in the Coastal Growth Area NORDA “ Gdynia, March 2016.

The conference gathered together the representatives of municipalities and companies that play a major part in the tourism and healthcare sectors as well as tourism organisations, scientific and educational institutions.

Joint purchase of electricity for 39 parties and of natural gas for 33 parties; that includes municipalities, companies and institutions from the Gdańsk-Gdynia-Sopot Metropolitan Area and the NORDA Forum. Gdynia was the leader of the purchasing group.

1

2

Direction NORDA

1

“Gdynia and Northern Kashubia, always in good taste” Culinary Route

A culinary guide to the cuisine of Northern Kashubia. The guide presents and promotes Kashubian cuisine, and its regional products. It includes descriptions of places where tourists can purchase specialities only to be found in this region.. The guide also presents information about culinary events organised in the municipalities of the Northern Kashubia area. It is available in both printed and electronic form.

2

Mobile “Gdynia ad Northern Kashubia” Application

Updated annually with new events. In 2016 the application was expanded with an information module for forest and city cycle routes.

3

Tourist guides

The municipalities are responsible for the development and publishing of summer events calendars in the form of posters available at tourist information centres in the area. Mini guides and maps with points of interests are also published. A recently published map presents the cycle routes that span throughout the Northern Kashubia region.

4

Press conferences

At the beginning of every summer the NORDA Forum holds an annual press conference that presents the best way to spend quality time in Northern Kashubia. In September 2015 an additional “In the rhythm of Kashubia” press conference took place in Wejherowo to highlight all of the events of autumn.

5

Gdynia and Northern Kashubia Bank of Images

As part of the “NORDA – The Northern Growth Pole” project a photography data base for the region has been created for all of the municipalities to use.

The branding theme of the Coastal Growth Area NORDA , “Joining Our Strengths to Move Forward,” is a perfect description of the main goal of the activities of municipalities working together within NORDA Forum.



Conference: The “Perspectives for the Development of the Health Industry in the NORDA Area,” in Gdynia Film School

Promotion of the economy

The promotion of the investment offer of NORDA municipalities during the largest international real estate trade shows in Munich and Cannes.

Investment areas of the NORDA Forum municipalities have been promoted during the MIPIM International Property Event in Cannes (2016 and 2017) as well as during the EXPO REAL 2016 in Munich.

Joint municipal investment offer as part of the “NORDA – Northern Growth Pole” project

The preparation and publishing of a folder with information on investment areas. A joint offer guarantees effective coordination and investment area management. An internet data base of investment offers for the NORDA Forum region is available at the www.investnorda.pl website.

Strategic documents

As part of the “NORDA – Northern Growth Pole” project, strategic and operational documents for two functional sub regions - the Coastal Growth Area NORDA and the Logistic Valley, have been developed: a development strategy for both, operational documents in the field of spatial development and land management, economic development for both functional areas and promotion for the Coastal Growth Area NORDA and transport development for the Logistic Valley.

1

2

3



Smoked fish served in the Faleza Hotel in Jastrzębia Góra

Gdynia and Northern Kashubia, always in good taste

Our cultural heritage is an important distinguishing factor in terms of culture, tourism and the economy. This potential is an important area for co-operation that facilitates integrated marketing activities under the theme “Gdynia and Northern Kashubia, always in good taste.”

The culinary offer of the Northern Kashubia region derives its inspiration mainly from traditional Kashubian cuisine, among other fish dishes, but also from modern international cuisine. In many places we find dishes created locally, very often according to traditional recipes. The most well-known meals from the Northern Kashubia region are: goose dishes (e.g. goose rutabaga soup, smoked or roasted goose), smoked fish (eel, kipper, flounder, salmon, mackerel), Baltic cod, herring (served in a Kashubian or *łeba* way), smoked meat from Bychowo, Pate, sour

dough pancakes, preserved sausages (in a jar), as well as the well-deserved brand of honey produced by Kashubian apiaries. Kashubian cuisine is rich in making the most of local gifts of nature: mushrooms, fruit, vegetables and herbs. Local markets, market halls (e.g. Gdynia Market Halls, the fish markets in Mechelinki and Dębki) as well as local markets offering cottage, and ecological food products (e.g. “Bazar Bo Ze Wsi”) are an important part of the local cuisine environment.

In 2016 as part of promotion activities of the local municipalities of Gdynia and Northern Kashubia a new tourist product named “Gdynia and Northern Kashubia, always in good taste” has been launched, a presentation of the most interesting culinary offers distinguishing regional values.

High quality cuisine offer is observed in the whole region, including seaside areas, and Downtown Gdynia. Just to bring to attention some data: the number of restaurants participating in the Gdynia

culinary route has grown from 31 [June 2010] to 72 [January 2017]. Well known restaurants, very often described in popular culinary magazines and guides, can be found among other on the Manor and Palace Trail of the Northern Kashubia [e.g. Ciekocinko, Krokowa, Gniewino, Sławutówko]. The recent trend of focusing on healthy, local cuisine created in the “slow food” fashion is worth emphasising. “Slow food” is promoted by restaurants: “Natura” in Rozewie, “Nordowi Mól” in Celbowo or “Ewa Zaprasza” in Sasino.



“Wędliny Bychowskie,” a family company that produces traditionally smoked meat – Władysław and Przemysław Brzozowscy (from right), the owners

XIV Volvo Gdynia Sailing Days

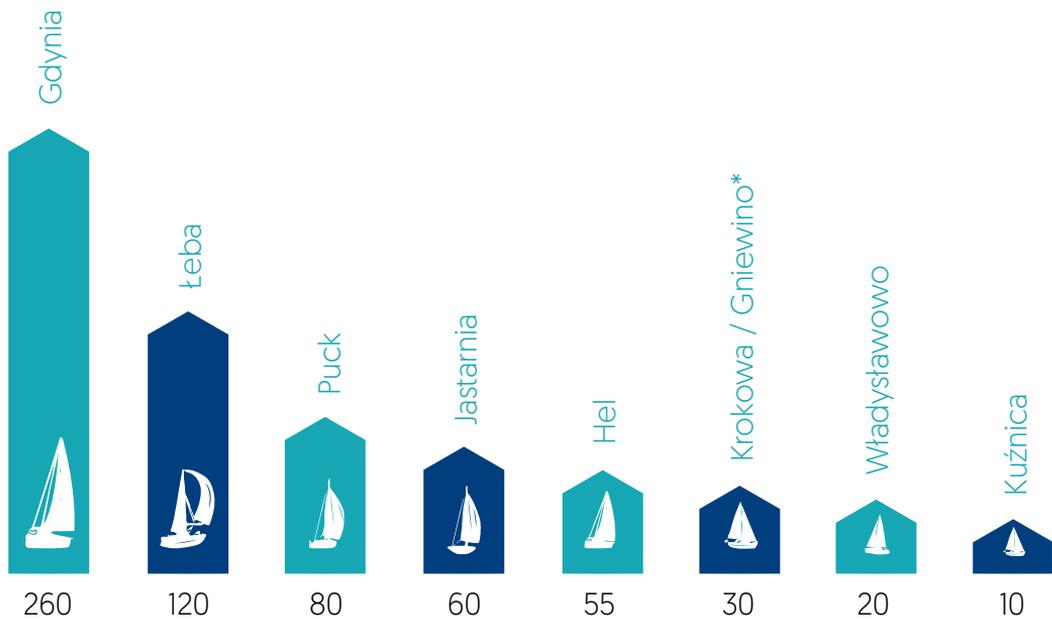


Sport is a major element of the region's identity. It reflects the region's passion, and pride in its achievements, and in high-quality infrastructure facilities - sport clubs; pride in the involvement of local residents in active recreation. Sport is a key element in the development of a high-quality of life in the region.

Passion for sports

Sailing plays an important role in the Northern Kashubia region mainly due to extremely good natural conditions found among other in the Bay of Puck. In recent years Puck and the small towns of Chałupy and Rewa have become one of the most important locations for windsurfing and kitesurfing enthusiasts in this part of Europe. Sailing is also popular on inland waters, for example on the Żarnowieckie Lake. Thanks to an agreement between the Krokowo and Gniewino municipalities, a network of four modern tourism and sports marinas with accompanying infrastructure has been created on this lake.

Mooring capacity in marinas:



* Marina network on Lake Żarnowieckie.

Source: developed by Gdynia Development Agency.

Jastarnia and Puck are planning to build yacht marinas. These projects have successfully expanded the mooring capacity of the region. Additionally, a new marina for 120 boats is being developed in Gdynia in the President's Basin.

Many children start their sailing adventure as early as in primary school. In all municipalities with access to inland and sea waters, basic sailing training is free of charge or grossly co-financed by local authorities. In Kosakowo all junior high school graduates acquire a sailing

license. Children and teenagers from Puck, Gdynia, Kosakowo, Władysławowo and Łeba have been awarded numerous medals during championship sailing races all across Poland and Europe. The M. Płażyński School Complex in Puck even possesses its own training yachts. The most important events of the season are: the Energa Sailing Cup in Gdynia, the Bay of Puck Cup in Puck, the Polish Cup in Gdynia, the Volvo Gdynia Sailing Days.

Northern Kashubia may also boast of the tradition in running events. Wejherowo has been a booming hub for the training of runners and marathon participants for years now. Mass running events and various versions of marathons are extremely popular and bring thousands of runners together, for example, the marathon [KRS Formoza Ultramaraton Kaszubski] in Przywidz, the PKO Grand Prix Gdynia – the largest running event in Pomerania, the Herbalife IRONMAN 70.3 Gdynia and the event Northern Run “Na Wspak” in Władysławowo. Gdynia has announced its candidacy to organise the World Half Marathon Championships in 2020.

A match of Arka Gdynia on the City Stadium in Gdynia



Gdynia is a city well known in Europe for its excellent sports clubs, including Asseco Gdynia (men's basketball), Basket Gdynia (women's basketball), Arka Gdynia (football in the extra-class league) and Vistal Gdynia (women's handball).

The development of sport infrastructure has translated into increased activity among children who are committed to at least one sport discipline. The Luzino municipality, where all children have free of charge access to different sport activities with professional coaching is an example to all.

European class sports facilities are located in Gdynia: in Redłowo, on Olimpijska street the National Rugby Arena, the City Arena [15 000 capacity], the Gdynia Arena [4 800 capacity], the Central Sports Medicine Facility, a conference hall as well as an athletic field and hall, and by the year 2019 a new swimming facility

with an Olympic sized swimming pool will be built. Gdynia is a city well known for its excellent sports clubs, including Asseco Gdynia [men's basketball], Basket Gdynia [women's basketball], Arka Gdynia [football in the extra-class league], Vistal Gdynia [women's handball].

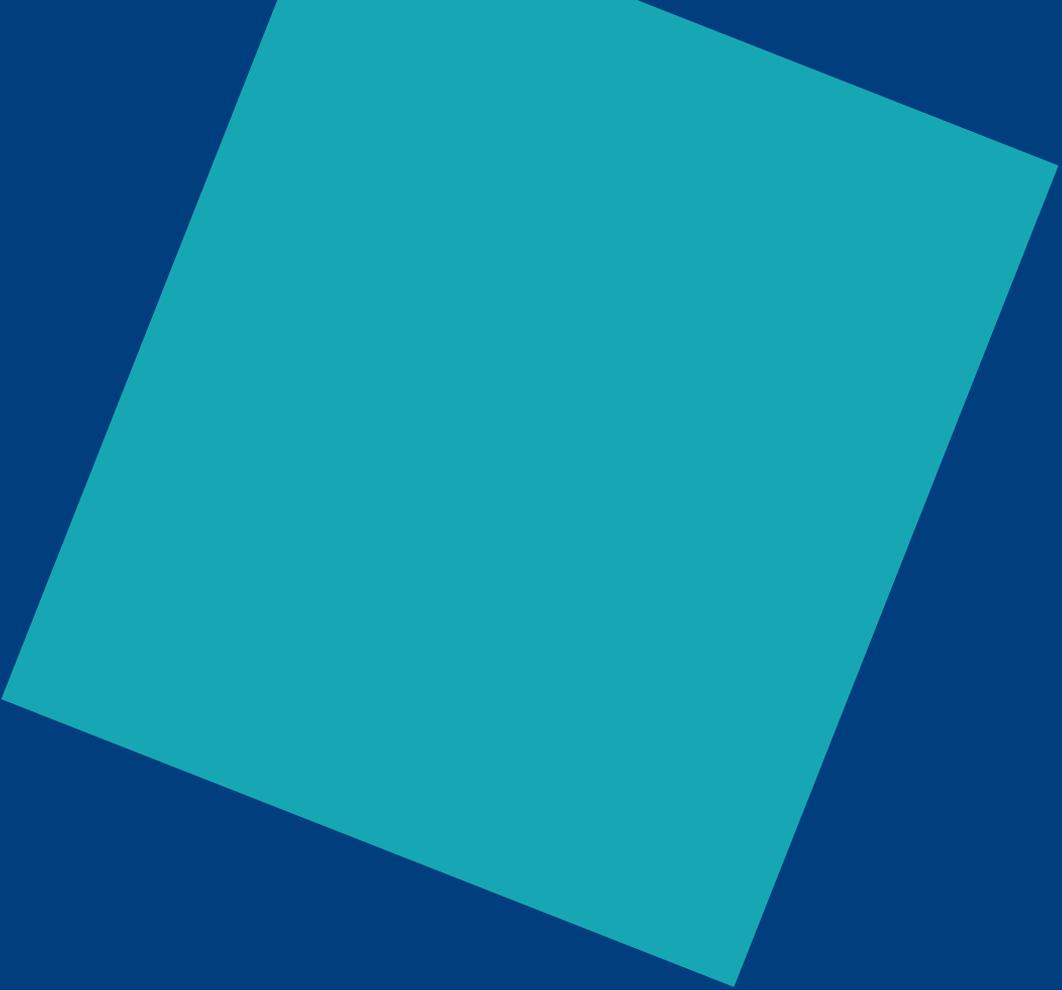
Additionally, state-of-the-art sports facilities have been built in Przywidz and Luzino and one may find modern sports infrastructure in Gniewino [Sports-Conference Centre] and Władysławowo [Central Sports Facility - Cetniewo Olympic Training Centre].



BALTICA TOUR competition, Sandra Piwowarczyk-Bałuk, contestant and owner of the Stadnina Koni Ciekocinko stables

Horse riding is a discipline becoming more and more popular in the region. The Choczewo municipality is proud of one of the most beautiful private stables in Poland - Stables in Ciekocinko holds two international show jumping events annually in the form of a three-week-long tour, the BALTICA TOUR. The event attracts the stars of the horse riding world from all over the globe as well as a large audience, guaranteeing not only sports-related emotions but also perfect entertainment for the whole family.

Cycling is another popular discipline. The annual Lang Team Marathon and Lang Team Race cycling marathons are good examples of the sports' popularity.



POTENTIAL

Economy

– an attractive business by the sea

Foreword

The NORDA Forum region is an area with rich economic traditions. Many of them are unique in the country, namely these related to the sea. The port of Gdynia and the areas of the former Gdynia Shipyard are a place where tens of companies prosper – port service providers, maritime commercial and logistic companies, as well as shipyard entities. The last ones in search of market niches are more interested in production of large-scale steel constructions for wind farms or the maritime mining sector. The

vicinity of the port and shipyard areas is a location for many manufacturing, transport and logistics companies. Maritime traditions cannot be however limited only to Gdynia. An efficiently functioning port or shipyard is not possible without a corresponding network of related and supporting companies. This network has developed in the last decades and is a decisive factor upgrading the competitiveness of offered services.

BCT Baltic Container Terminal Ltd in Gdynia





Glass facade of the Emigration Museum in Gdynia

Maritime activities are also strictly connected with the fisheries industry and businesses, among other fish processing industries and trade. These businesses are mainly present in northern coastal municipalities of the Pomeranian province: Puck, Krokowa, Jastarnia and Władysławowo.

Another fundamental sector of economy is food and agriculture. The NORDA Forum municipalities also specialise in construction industry and wood work, wooden furniture industry, as well as door and window manufacturing.

Recent years have witnessed the development of non traditional sectors of the economy, especially when it comes to providing services to businesses. City areas are a natural location for such companies. It should come as no surprise that in the case of the NORDA Forum, these companies are located in Gdynia, which offers investors a wide range of office space and access to highly qualified employees. Excellent communication infrastructure and a high quality of life attract advanced business services to Pomerania.

Tourism is another key element of the local economy. Many companies from the region perform services connected with this industry – guest houses, food, agro tourism, commerce. The conditions for these operations are perfect as this region is one of the most popular holiday destinations in the country. The most significant challenge that the tourism sector faces is expanding the tourism season into the whole year. This can be facilitated by the development of active sports and health tourism.



The lighter, Dariusz Godula of the Stilo lighthouse, Choczewo Municipality

Living off the sea

The NORDA Forum area is inseparably related to the sea and the maritime industry is a key element of the economy of the participating municipalities. Without a doubt Gdynia is the most important centre for the maritime economy in the NORDA Forum area, with one of the three largest Polish sea ports and a developed shipyard sector. Municipalities located by the Baltic Sea, Władysławowo, Hel, Jastarnia, Puck, Krokowa, Kosakowo and Łeba, are also closely connected to the sea through their fishing companies. The vicinity of the sea is arguably positively affecting the economies of other NORDA Forum municipalities, even those not located directly by the sea. Fish processing plants function in those areas and many local companies provide services to the maritime industry, located for example, in Gdynia.

Ports

The potential of the maritime industry is generated mainly by two large sea ports in Gdynia and Gdańsk. They are the life bloodstream of Poland's economy. They create the conditions necessary for development of other companies from different economic branches.

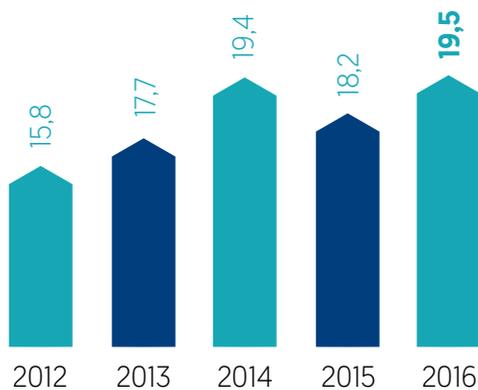
The Port of Gdynia is a hub of maritime and maritime related companies. Numerous

companies from such sectors as port services, maritime commerce, navigation, logistics and international transports, shipyard, maritime and transport insurance, sea agents and brokers, customs agencies and offices as well as port-related service sectors function within its range. The vicinity of the port is an excellent location for warehouses and logistics and manufacturing companies.

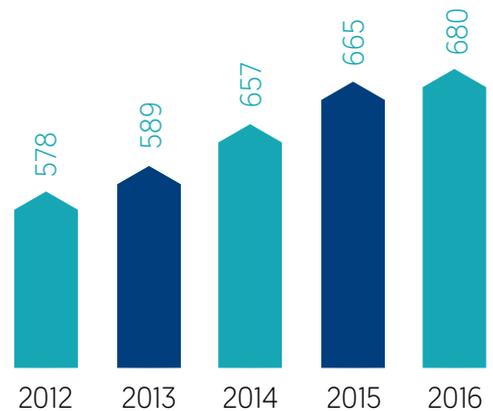
The Port of Gdynia is the largest Polish port handling general cargo goods. Today, thanks to the Baltic Container Terminal and Gdynia Container Terminal its focus is concentrated, among other, on containers. Gdynia is ranked at the top of the Baltic Sea ports. Projects developed and projects underway will increase the overall capacity of the port to approximately 2.2 million TEU.

This in turn has a definite impact on the development of many companies in the field of transport, forwarding and logistics in the NORDA Forum area. The region has become a logistics hub for the southern Baltic Sea. This is backed up by the activities of many large companies of the sectors, e.g. C. Hartwig Gdynia S.A., InterMarine Group, CTL Północ Sp. z o.o., Loconi Intermodal S.A., PCC Intermodal S.A. or Terramar Transport, Forwarding, Logistics.

Turnover in the Port of Gdynia
[in millions of tonnes]



Number of passengers in the Port of Gdynia
[in thousands]



Source: Developed by Gdynia Development Agency on the basis of the Port of Gdynia Authority S.A. data



VISTAL Gdynia S.A. production hall

Shipyards

The shipyard sector is one of the key elements of the maritime economy and after numerous problems and issues connected with the restructuring process of former state companies it is finally on the rise.

The land formerly owned by Gdynia Shipyard now belongs to Shiprepair Yard "NAUTA" S.A., Energomontaż Północ Gdynia S.A., Gafako Sp. z o.o. and CRIST S.A. The last company on that list performs classic shipbuilding services. In 2010 the company bought the most important parts of the liquidated Gdynia Shipyard - the dry dock and chassis prefabrication

hall for hulls. This enabled CRIST Shipyard to build three advanced ships for building and servicing sea wind farms: Thor, Innovation and Vidar for the German company Hochtief Solutions AG. CRIST also builds ship hulls, mostly for offshore vessels. The company is now focusing its efforts on building a transport passenger-car ferry for Iceland.

Shipyards, formerly known for ship building and maintenance, are now increasingly focusing on the creation of large-sized steel constructions used e.g. in offshore wind farms or the oil and natural gas mining sectors. These types of constructions are performed in Gdynia by e.g. CRIST S.A., Energomontaż-Północ S.A., Vistal Gdynia S.A. or Gafako Sp. z o.o.

Shipyards, formerly known for ship building and ship repairs, are now increasingly focusing on the building of large-sized steel constructions used e.g. in offshore wind farms or the oil and natural gas mining sectors. These types of constructions are performed in Gdynia by e.g. CRIST S.A., Energomontaż-Północ S.A., Vistal Gdynia S.A. or Gafako Sp. z o.o.

Yet the Pomeranian shipbuilding industry is not only limited to large production companies. In the last decades a whole network of local companies has developed related to these activities. Many generations have linked their lives with shipbuilding. It's worth to mention the success of a family Gdynia enterprise RUBI specializing in production of scaffoldings, steel constructions and other elements.

The shipbuilding business family constitutes also dozens of design offices, ship equipment manufacturers, ship hydraulics, electronics companies,

etc. This is a comprehensive network of suppliers and partners. These companies generate the potential of local shipyards by providing them with a competitive edge.

Sea yacht production and production of aluminium boats also boosts the sector's performance. Among their representatives are: Admiral Boats S.A., Damen Shipyards Gdynia S.A. and Sunreef Yachts.

The shipbuilding industry generates innovations and solutions worked out with close co-operation of scientific institutions and business entities.

Wind energy

The energy and climate policies of the European Union induce partner countries to develop their renewable energy capabilities. Pomerania with its prevailing climate conditions has the environment necessary to develop wind farms. Some already function in the region, in Gniezdzewo and Łebcz in the Puck municipality.

In the next few years the Pomeranian region will use the renewable energy from sea wind power plants. Two such projects are planned – Baltic II and Baltic III. The combined output of these installations will be 1.2 GW. Both facilities will be located North West of Łeba, 37 and 23 km from the shore line.

Wind farm in the Puck municipality



Ship management

Recently an opportunity has arisen for a new type of maritime service: ship management. Nowadays 80% of all ships under international law use this kind of service. The number of companies that provide such services is increasing in Poland as well, with the founding of the Polish Ship Managers' Association being a good example.

The Pomeranian province offers qualified, experienced personnel for the maritime industry as well as advanced scientific and training infrastructure. The renowned classification associations are also active here. All of these factors result in perfect conditions for the modern ship management sector. It is estimated that the next few years will witness an even bigger boost to this sector and that Gdynia as well as Pomerania will have a chance to develop this service area.



Fishing – fishermen from the Choczewo municipality

Fishing industry

In the NORDA Forum area a couple of smaller fishing ports are present. The Baltic sea yields mostly cod, herring, brisling, flounder and salmon. Fishing ports and harbours are located in: Łeba, Hel, Władysławowo, Puck, Mechelinki, Dębki and Jastarnia. They are a key element of the local economies.

The ports apart from their basic functions are tourist attractions. One may not only buy fresh fish but also enjoy organised by local companies deep sea fishing trips.

Small ports in the NORDA Forum area

Władysławowo port

The port houses a ship repair yard, fish processing, flake ice and fishmeal plants. It also a place of transshipment activities for domestic goods. The shipyard among other performs repairs for the Baltic fishing fleet and smaller sea vessels.

1

Hel port

Hel is mainly a fishing port. Two major fishing companies are present here: "Koga" and "Koga Maris". The port is also a home base for two on call rescue ships: "Pasat" and "Huragan". The Hel port is a port of coastal cruising vessels of the White Fleet.

2

Jastarnia port

This port is mainly a fishing base, equipped with a passenger platform and a yacht marina. 60 m long boats with 4 meter drafts can enter the port.

3

Puck sea port

This port is a fishing harbour as well as an independent yacht marina. Puck port is a base for fishing operations and a harbour for small cruise vessels, a centre for water sports. A sea scout centre for youth and a repair boatbuilding hall are located here.

4

Łeba port

This is a fishing and tourist port. During the summer period the port is visited by small cruisers offering short trips out to the sea. Since 1998 it accommodates yachts of various classes, including up to 18 m long sailing boats and up to 24 m long motor boats.

5

Mechelinki fishing harbour

The harbour houses eight buildings, including five fishermen boxes and a smokehouse. A wooden pier is the main tourist attraction.

6

Dębki fishing harbour

This is a modern harbour for local fishermen, commonly known as the Rybaczówka. It includes an observation tower, which is the main tourist attraction. One can buy fresh fish "straight from the boat" in the Rybaczówka.

7

Tourism strengths of NORDA

Tourism potential is one of the key advantages of the Pomeranian province. The region is third in Poland when it comes to the number of used beds and third when it comes to the overall number of available accommodations. The largest concentration, apart from Gdańsk, Gdynia and Sopot, is to be found in places located on the northern coast, especially the district of Puck [Hel, Jastarnia, Władysławowo, Krokowa], Łębork [Łeba, Wicko] and Wejherowo district [Choczewo].

In 2015 the NORDA Forum area boasted nearly 43 thousand accommodation spaces, which constitutes 42% of those available in the Pomeranian province. Władysławowo, Łeba and Gdynia are at the top of the list with the largest number of offered beds.

102 000
Pomorskie province

42 899
Forum NORDA area

16 175
Władysławowo commune

9 375
Łeba

2 689
Gdynia

Source: Developed by Gdynia Development Agency on the basis of Central Statistical Office data [BDL GUS]

The Kite Festival in Łeba



Baltic Riviera

The longest in this part of Europe sandy beaches, favourable weather conditions and a stunning cliff coastline are just one of the region's assets. Holidaymaking in the Baltic region includes more often than before marine and active tourism. Bicycle riding, sea fishing, diving (wreck exploration), nordic walking and horse riding are the most popular forms of

active relaxation. The Bay of Puck region is one of the most alluring areas for wind and kitesurfers in Europe. Projects for the development of ports and marinas implemented by coastal municipalities (e.g. in Jastarnia, Gdynia and Puck) translate directly into its increasing attractiveness to sailing enthusiasts from Poland and abroad.

Cultural trails and active tourism

Key cultural trails are found in the area of the NORDA Forum. They are a vital element of the region's integrated tourist offer. The most important of them are:

- The Manor and Palace Trail of Northern Kashubia
- The Pomeranian Cistercian Trail
- The Military History Trail of Northern Kashubia
- The Amber Route
- The Lighthouse Trail
- The Pomeranian Way of St. James

Apart from available roads for car traffic more and more people get to know the region taking a bike or using a boat. Projects of strategic importance to the development of water and bicycle tourism in the region are: The Żuławska Loop, Pomerania from a Kayak and Pomerania from a Bicycle (including the International R10 Bicycle Trail). In the coming years will see the creation of hundreds of kilometres of marked kayak and bicycle routes as part of the development of these projects, including sub regional and local NORDA Forum municipality projects.

Some of the NORDA Forum cities have already implemented their own routes, based on unique features such as the Gdynia Modernism Route, the Gdynia Sea Legend Route and the Kashubian Sounds Route in Wejherowo [Szlak Kaszubskich Nut].

Modern museums, interactive expositions and education centres are yet another way to attract culture tourism. Most of the facilities of this type have been created and modernised with the help of EU funding.

The number of visitors in selected NORDA Forum tourist attractions in 2016:



* estimated data



Searium in Hel



Palace in Rzucewo, Puck municipality

Development of health and sports tourism offer

The sea climate facilitates the development of health and sports tourism in the region. Over 700 sports groups each year visit one of the most well-known facilities for athlete rehabilitation and training - The "Cetniewo" Centre for Sports. Such popular Polish athletes as Anita Włodarczyk, Kamil Stoch or Justyna Kowalczyk regularly visit the Centre. Tourists are also attracted by numerous, prestigious sports events organised in the NORDA Forum area.

Health tourism is also developing thanks to a specialised hotel offer [Hotel Kuracyjny in Gdynia, Hotel Łeba and Hotel Wodnik in Łeba, Hotel Primavera in Jastrzębia Góra] and rehabilitation and rehabilitation-holiday facilities [Zdrowotel in Łeba, Natura Park in Ostrowo, Puckie Centrum Medyczne in Puck].

In 2016 an international conference on the trends and potential of health tourism took place as part of the implementation of operational documents of the project "NORDA – The Northern Growth Pole". According to experts and speakers health tourism in the whole country and in the region, including Northern Kashubia, should experience dynamic growth in the coming years.



Promising conference industry

The potential and competitiveness of the conference industry are dynamically growing in the NORDA Forum area, also because of a wide range of conference facility offers in historic manors and palaces, the development of high quality hotel services as well as the founding of modern conference and cultural facilities, e.g. the Pomeranian Science and Technology Park Conference Centre in Gdynia, the Sport and Conference Centre in Gniewino and Wejherowo Culture Centre.

Dynamic business drawn from tradition

The service sector of the NORDA Forum, including modern services for business, is focused mainly in Gdynia. On the other hand, the regional manufacturing sector is much more widely distributed. Many municipalities of the NORDA Forum are a location of continuous business traditions. Here furniture manufacturing deserves a special mention with strong companies such as: Gościcinska Fabryka Mebli Sp. z o.o. or Meblomak Sp. z o.o. [Rumia]. Other notable sectors are door and window manufacturing, led by such companies as PORTA KMI Poland Sp. z o.o. [Bolszewo], WIKĘD Sp. z o.o. [Luzino] and Bracia Bertrand Sp. z o.o. [Luzino]. Many local companies in the Cewice and Karsin municipalities specialise in woodworking. Construction companies also have a strong presence in the region with such companies as Balex Metal Sp. z o.o. [Bolszewo], Orlex

Beton [Gościcino], MEGA S.A. [Gdynia] and Korporacja Budowlana DOM Sp. z o.o. [Krokowa]. Markisol International Ltd from Wejherowo, a global leader in the manufacture of blinds and shutters, works closely with construction as well as door and window manufacturing companies from the region. The food and agricultural industry is an important part of the regional economy as well. Modern production facilities in the NORDA Forum region are maintained by e.g. J.J. Darboven Poland Sp. z o.o. [Rumia], Farm Frites Poland S.A. [Lębork], Dr. Oetker Polska Sp. z o.o. [Władysławowo], Thai Union Poland Sp. z o.o. [Gniewino] or Graal S.A. [Wejherowo]. Other well-known companies in this sector are the mustard manufacturer Dagoma Sp. z o.o. [Puck] and Nord Capital Sp. z o.o., a fish foods manufacturer under the Family Fish brand in Rekowo Górne near Puck.



Bracia Bertrand Sp. z o.o. Sp. k. window factory in Luzino



VISTAL Gdynia S.A. production hall

The above listed companies, even though not all of them are owned by Polish capital, are examples of businesses based on the strong advantages of the region, which are a result of many years of experience and tradition. The activities of these companies

translate into benefits for municipalities such as the creation of jobs and tax influx, but also in the form of the development of local support networks. The range of the services these companies provide is wide.

Local market halls are important places that support the energetic trading and service traditions. Apart from providing the ability to purchase high quality food, mainly from the Kashubian region, these halls also house multi-generational craft and commercial companies created and maintained through the business prowess of local entrepreneurs.



Business with a perspective

The NORDA Forum area, and Gdynia in particular, has a high potential for the development of the creative industry. This includes advertising and marketing services, architecture and industrial design, handicraft as well as film, music, photography, artistic and entertainment services. Gdynia was one of the first Polish cities to implement the “City of Good Design” [“Miasto Dobrego Wzoru”] programme as well as to support the creative industry.



Creative sewing workshop Mana Mana in Gdynia

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Creators have been drawn to Gdynia since 2008 by the Gdynia Design Days. This annual event is a show case for the latest trends and good practices in design. It includes inspiring expositions, speeches, workshops, lectures and discussion panels. The event is prepared for professionals, young entrepreneurs and enthusiasts seeking inspiration from all over the region.



maradDesign industrial design studio in the Pomeranian Science and Technology Park Gdynia

The creative sectors are gaining more and more significance in the global economy, they have a positive impact on the quality and effectiveness of public and business spaces. Industrial design is one of the main modules of the Pomeranian Science and Technology Park in Gdynia. Many recognised companies have been founded and work here, such as: Malafor Design Laboratory, maradDesign, Langier Design Sp. z o.o., Mikro Art Studio s.c. Makowski S., Tomaszewski G., Edyta Barańska Design. Additionally, many companies from the region successfully implement their innovation through design strategies, such as S&A S.A., Enbio Technology Sp. z o.o., FLOWAIR Głogowski and Brzeziński Sp.j., Keyce, UNDA.

The positive projection of future development is affected by many factors, including the activities of key creative industry institutions in the region such as the design centre “Centrum Designu Gdynia”, the

Gdynia Film School, the Traffic Design association and the Puck Project.

Projects committed directly to young companies are also very popular. These include: “Creative Gdynia” [“Gdynia Kreatywna”], an open, free training and coaching programme and the “Youth at start” [“Młodzi na start”], contest for young photographers organised with the help of the “Elle Decoration” magazine.

Numerous small traditional workshops are present in the NORDA Forum area, which create, for example, high quality amber jewellery or manufacture furniture. New handicraft companies offering various products are being started because of the rising interest in unique and local items.

The region is known for its high potential and the quality of its ship designing staff, employed in specialised Polish and foreign design offices.

The BRANDSPOT company located in the Pomeranian Science and Technology Park in Gdynia has received an award in the “Work” category of the “Good Design” contest organised by the Polish Institute of Industrial Design. The contestants prepared the design and ergonomics of the case and graphic user interface for a modern device for microwave sterilisation manufactured by Enbio Technology Sp. z o.o.



Business innovations

The advanced business potential of the people of Pomerania in connection with close co-operation with the personnel from the largest higher education facilities in Pomerania directly affect the increasing innovation of both new and already existing business. Working closely with scientific centres has helped many companies gain an excellent position on the market, these include Bowil Biotech Sp. z o.o., Enbio Technology Sp. z o.o., Techjet Sp. z o.o., IVONA Software Sp. z o.o., MpicoSys - Embedded Pico Systems Sp. z o.o., Bilander Group Sp. z o.o., Space Forest.

Technological parks, such as the Pomeranian Science and Technology Park in Gdynia, play a key role in the development of business innovations. This integrated facility is a unique combination of laboratories, offices (mainly open space), exposition and conference halls.

New technologies are developed here and advanced concepts come to life. Many biotechnological, environmental, IT, electronics, telecommunications,

engineering, social innovation and design companies are located in the park. This is a place for the cooperation of science with business, where students, graduates, scientists and experienced entrepreneurs can bring their ideas to life.

The Start-up Gdynia Zone programme should be mentioned here as it is a space for supporting both those with interesting ideas for business and the young owners of companies.

One of the latest components of the facility is the Constructors' Park dedicated solely to the testing and development of new technologies as well as the perfecting of existing products and their manufacturing processes.

In the area once occupied by the Gdynia Shipyard an innovative business project known as the Baltic Port of New Technologies has been founded. Its task is to support and develop modern companies by combining the latest technological concepts with production and services in Poland and all over the world.

One of the most important factors that makes up the potential of this facility is the creativity of its management staff and an understanding of the

importance of the industrial design sector. Innovations are commonly implemented by start-ups as in the example of solar bikes from Fresh Bike of Wejherowo or a revolutionary design of diving fins manufactured by a young EXOFIN Sp. z o.o. company from Gdynia. One also needs to include the Bowil Biotech Sp. z o.o. company from Władysławowo which is the first company in the world to manufacture bio cellulose in accordance with Good Manufacturing Practice pharmaceutical standards.



Start-up Fresh bike in Wejherowo

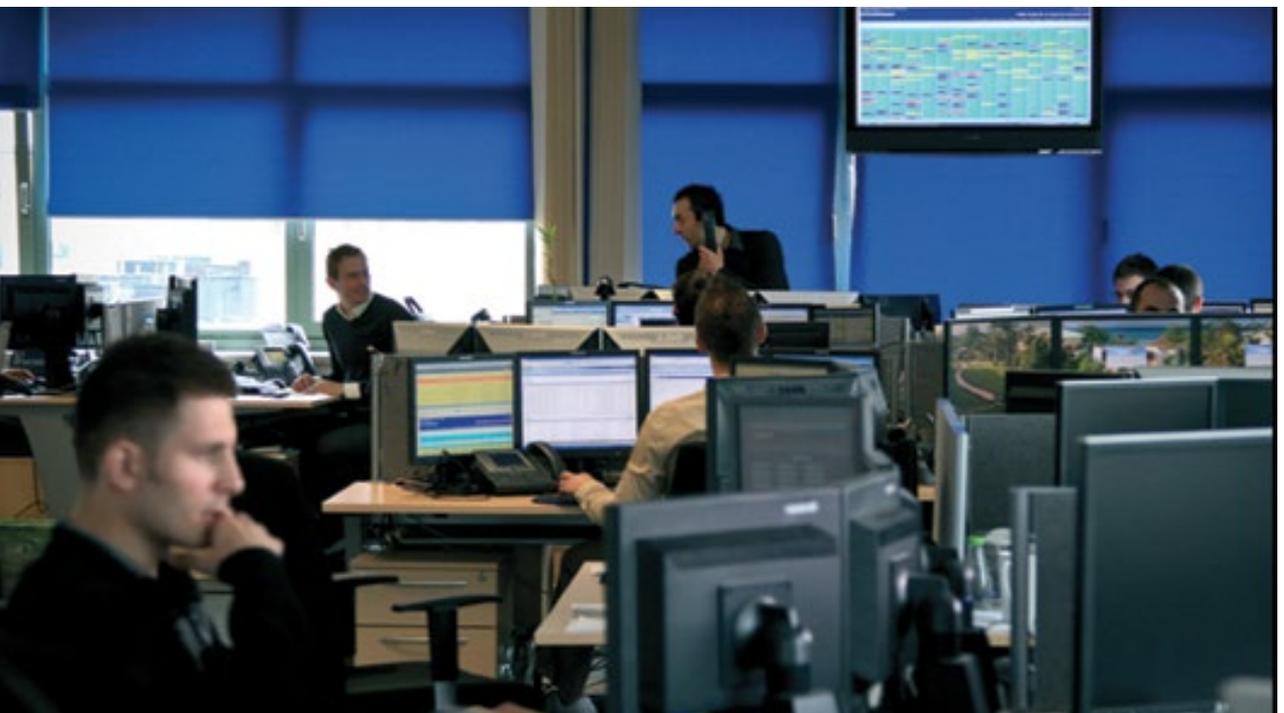
Integrated service centres

In recent years modern business service centres for the business process outsourcing sector have been dynamically developing in the Pomeranian region, located in new office parks in Gdańsk, Gdynia and Sopot. The Tricity metropolitan area has been titled "The Fastest Developing City" by the international board of CEE Shared Services and Outsourcing Awards 2017. This award is the result of investment projects conducted in 2016 and numerous development plans realised by Tricity companies of the modern business service sector. Gdynia is home to modern service centres for such companies as: Sony Pictures Global Business Services Sp. z o.o., Geoban S.A. Poland, DNV GL / Det Norske Veritas Poland Sp. z o.o., Thomson Reuters [Markets] Europe S.A. Oddział w Polsce and Misys Global Ltd. Gdynia. Their presence increases the prestige of the city and affects the positive image of the region globally.

As of now there are approximately 100 modern business centres in the region which employ 19,000 people, mainly in the ICT and finance sector. What distinguishes the region is the large share of specialists [2,300] in the most advanced R&D centres. Creativity and innovation are the outstanding features of the region's human capital. The ICT sector is becoming

the distinguishing factor of the city and the whole region. IVONA Software Sp. z o.o., bought by the American corporation Amazon, as well as Vector Sp. z o.o., Nokaut.pl Sp. z o.o., IntelIWISE S.A. and Fido Intelligence Sp. z o.o. are successful because they invested in research, development and technology.

The Baltic Business Center office building in Gdynia





In the prestigious ranking by fDi Magazine, a part of the Financial Times Group, in the category of medium sized cities, Gdynia twice in a row – in 2015 and 2017 – was distinguished as the “Polish City of the Future”. The ranking considered 50 Polish cities in respect of: economic potential, human resources, the quality of life, cost efficiency, accessibility, and a friendly business environment.

The location of service centres is not random. Access to a wide range of graduates of technical, financial and management studies is considered to be one of the advantages of the region. According to the analyses of the Pomerania Development Agency Co. [Agencja Rozwoju Pomorza S.A.] our region is distinguished by a large group of graduates who even know the less popular languages of Scandinavia.

Because of its transport advantages and the existence of modern business parks, most business outsourcing, as well as innovative companies from the NORDA

Forum are located in Gdynia. The employees of these companies live in the municipalities of the NORDA Forum.



The Grunwaldzki square and the building of Gdynia Film School

Space for life and business

An climate for business

The income of Gdynia and the municipalities participating in the NORDA Forum in 2015 was PLN 2,684 million. This constitutes 26.4% of the overall income of all municipalities and poviats in the Pomeranian province. Nearly half of the income came from Gdynia, 6% from Wejherowo and 5% from Łębork and Rumia.

Municipality income structure with poviats in the NORDA Forum area 2015



Source: Developed by Gdynia Development Agency on the basis of Central Statistical Office data [BDL GUS]

The highest income per person in 2015 was in the Krokowo municipality [PLN 7,607], Jastarnia municipality [PLN 6,080], the city of Łeba [PLN 5,676] and the Gniewino municipality [PLN 5,674].

Activities that catalyse business

The activities of local authorities shape the climate for business. Conferences, training, contests and economic marketing projects are examples of positive operations. Among the NORDA Forum municipalities Gdynia has been most active in this area. Initiatives of the city of Gdynia:

- Global Entrepreneurship Week consists of a wide variety of events where companies, schools and higher education institutions, institutions and non-governmental organisations work together to promote and develop the idea of entrepreneurship in our country. Over 160 countries from all over the world participate in this event. Gdynia has been organising a local edition of this event since 2008.
- “Gdynia’s Business Plan” [“Gdyński Biznesplan”] contest – since 2003 the participants have taken part in a wide range of free training sessions. Additionally, they are able to consult with experts. The winners acquire financial and non-financial prizes, and other attractive gadgets, and assistance.
- “Success on high heels” [“Sukces na szpilkach”] – meetings for women who have companies or are planning to start their own. The participants share their experiences, problems and successes. The meetings are organised four times a year with the participation of the Pomerania Development Agency.
- Micro company Platform “Klucz” – entrepreneurs have met once a month since 2014. This is a place to share experiences and create new relationships. The participants have created the “Commandments for ethics and culture in business.” The meetings are open and anyone interested in business can attend.
- The “Maritime Economy Forum Gdynia” is a direct continuation of the International Economic Forum and one the most important maritime events in the country. The Forum focuses on practical issues that are key to the competitiveness of companies and the development potential of the maritime economy sectors and Baltic ports.
- Propeller Prize - an annual award for Polish and Swedish companies that create and develop innovations in the maritime technology and IT sector. This contest is organised by the city of Gdynia, Stena Line and the Pomeranian Science and Technology Park Gdynia.

Initiatives that aim to boost local business are not just taken up by Gdynia. In 2016 Wejherowo hosted Poviát Enterprise Week. This event was organised for high school students, they had the chance to meet with local businesspeople and learn practical business knowledge and skills. The aim of the planned activities was to create initiatives with teenagers and convince them to create their own companies in the future.

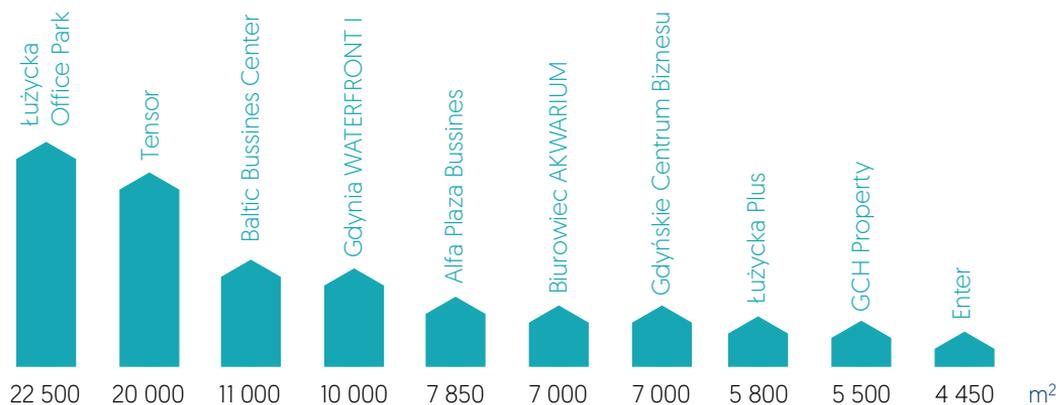
NORDA Regional Business Chamber is located in Wejherowo with dozens of local participating companies. The goal of the Chamber is the protection and representation of the participating companies and their integration also with organisations active in support activities for the local businesses. The chamber co-creates the local commercial environment, e.g. by promoting the “FAIR PLAY” rules in business, organising “business breakfasts”, thematic meetings as well as international economic missions.

An infrastructure for modern business

Office and storage space

Undoubtedly, one of the benefits of the Pomeranian region, including the NORDA Forum area, is a large availability of office space. The largest office facilities are located in the biggest cities of the region.

Largest, most advanced office centres in Gdynia [2017]



Source: Developed by Gdynia Development Agency on the basis of the Port of Gdynia Authority S.A. data



The Baltic Business Centre office building in Gdynia

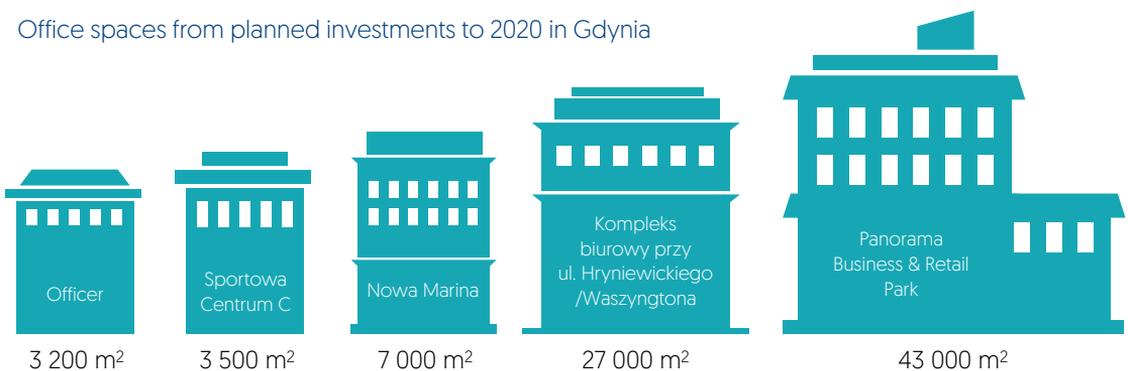
The local office real estate market is regarded as highly dynamic and promising and this is partially thanks to business process outsourcing and the service centre sector. Office buildings that are under construction or are currently being planned and an increasing interest from potential tenants are the best proof of that trend.

These are some of the latest additions to the market realised in Gdynia: a compound of three modern class A buildings, "Tensor"

by Łużycka street [20,000 m²], investments built in the prestigious environment of the so-called Sea City - Waterfront Gdynia [10,000 m²] and the planned office compound located by Hryniewieckiego and Waszyngtona street [27,000 m²].

Another fact that confirms the strong position of the region in the Polish class A office real estate market is the prestigious Eurobuild Award 2014 in the category of Office of the Year for the Łużycka Office Park in Gdynia.

Office spaces from planned investments to 2020 in Gdynia



Source: Developed by Gdynia Development Agency on the basis of the Port of Gdynia Authority S.A. data

Its coastal location makes the area of NORDA Forum an ideal place for the development of logistics services, both in terms of Poland and Europe. The local warehouse market has the largest storage space in northern Poland. The dynamic development of regional ports and of the road infrastructure, the A1 motorway, the southern by-pass, and the role of the logistics centre in the region will soon be much greater.

Even now, the offer of local warehouse space supply is estimated to be as much as 400,000 m² and currently

under construction are buildings that will add another tens of thousands of square metres.

The main storage spaces in the NORDA Forum area are, e.g.: storage centres Centrum Magazynowe Hutnicza belonging to MEGA SA, Centrum Magazynowe Hutnicza II and the Logistics Centre of the Port of Gdynia. A High Bay Warehouse with a cubic capacity of 18,000 m² has been opened in the Port of Gdynia in 2013.

Special economic zones

Two special economic zones, Słupsk Special Economic Zone and Pomeranian Special Economic Zone, are an incentive to bring more investment into the NORDA Forum area. The first zone offers 9 ha of unoccupied space for investment in the “Łębork” subzone (as of January 2017). Four companies have appeared in the “Łębork” subzone: the logistics company AJ FOOD Sp. z o.o., Alu-System s.c., Grupa Sportex and PPH AMG Sp. z o.o. from the metalworking sector.

The Pomeranian Special Economic Zone offers 1.6 ha of unoccupied investment space in the “Łeba” subzone, less than 16 ha in the “Liniewo” subzone and nearly 30 ha in the “Żarnowiec” subzone (as of January 2017). The “Żarnowiec” subzone is very popular among investors – 16 companies

have implemented their projects there, mainly from the metalworking and fish processing sectors (e.g. Graal S.A., Agro-Fish Sp. z o.o., Metal Link Sp. z o.o.).





Balex Metal production hall in Bolszewo

The Baltic Port of New Technologies has been created as a part of the Pomeranian Special Economic Zone. This is an innovative business project that promotes the idea of the revitalisation of areas of the former Gdynia Shipyard and supports initiatives from the NORDA Forum area. Companies which invest in these areas as well as investors from Poland and abroad can freely develop the environment of their business thanks to office spaces in the port area [7,000 m²]. The project also acts as a support centre for companies that function on the land of

the former shipyard by offering assistance in the implementation and transfer of new technologies, modern R&D laboratories, office spaces and conference rooms.

The Constructors' Park has been created as well thanks to the co-operation between the Baltic Port of New Technologies and the Pomeranian Science and Technology Park in Gdynia. This building offers space for creators, designers and engineers who can develop their technological plans using the "from concept to product" formula.



BOWIL Biotech laboratory in Władysławowo

Other business support activities

The Puck municipality has an attractive offer for potential investors. A 100 ha investment area has been located in the Rekowo Górne and a new Special Economic Activity Zone has been created in Wejherowo, which includes 50 ha of municipal land and 100 ha of private grounds. The investors are e.g. Zoeller Tech Sp. z o.o., Bowil Biotech Sp. z o.o..

One of the key initiatives that support business in the NORDA Forum area is the Kashubian Business Incubator [Kaszubski Inkubator Przedsiębiorczości] STOLEM in Lębork. It provides companies with office, marketing, and administration services as well as granting assistance with technology transfer, legal, tax and patent issues as well as accounting and financial assistance

with information on gaining financing for future development. This support also includes the creation and development of co-operation between companies as well as between companies, science centres and education institutions. STOLEM is also concerned with pro-innovation child and teenage education when it comes to technology.

Gdynia Entrepreneurship Support Centre created by the city is another form of assisting companies. Future businesspeople who are planning to start their own business can acquire practical hints about registration procedures as well as knowledge about financing sources from institutions that support businesses and from the EU. The Business Support Centre offers a comprehensive range of services that develop the local business environment, e.g. legal and investment advice, unemployment subventions, free training.

Among its programmes one can find the “Gdynia’s Business Plan” contest [“Gdyński Biznesplan”], the “Gdynia’s BiznesMam”

[“Gdyński BiznesMam” – a project directed at young mothers] and “Creative Gdynia” [“Gdynia Kreatywna”] projects as well as the “Junior Business” [“Junior Biznes”] contest.

The Gdynia Business Incubator also supports the development of local entrepreneurship, and to a large extent focuses on supporting innovation. Among the priorities of the incubator is the support of the transfer of knowledge and technology between the scientific and business community which is realised by e.g.: connecting potentially interested scientific and business parties or providing coaching for newly created innovation companies.



Business Incubator in Gdynia

Attractive public space

A well designed public space affects the quality of life of the citizens and can become a source of inspiration for creative, cultural and sports activities.

Our region has traditionally attracted the attention of tourists during the summer period so special emphasis is placed on the design of attractive public spaces. This pertains to all of Northern Kashubia. Here are some of the examples of such successful transformations: Gniewino [“Kaszubskie oko” tourism and relaxation facility with an observation tower], Wejherowo [Wałowa street promenade, city park, Cedr riverside infrastructure], Rumia [Culture Station “Stacja Kultury” - revitalisation of the city train station], Reda [city park], Gdynia [Żeromski Square - Gdynia InfoBox, Grunwaldzki

square with the Gdynia Film School building], Puck [revitalisation of the historic marketplace], Kosakowo [the Aleja Zasłużonych Ludzi Morza promenade in Rewa], Lębork [revitalisation of the “Fregata” cinema and the train station]. Most of these projects have been implemented with the help of EU funding. The coming years will witness investment in public spaces by the municipalities in Łeba [Plac Rybaka], Władysławowo [three complementary projects], Jastarnia [Marina] and Hel [post-industrial and former fishing port area revitalisation].

One of the key elements of the planned projects for public spaces are public consultations and the inclusion of the projects in the wider context of a comprehensive revitalisation programme. One of the examples of such activities is a programme for revitalisation of six designated areas in Gdynia [Babie Doły, Chylonia, Leszczynki, Oksywie, Witomino-Radiostacja], valued at PLN 96.5 million, and realised by the Social Innovation Laboratory in Gdynia.

The Majakowski city park in Wejherowo





Amphitheatre in Wejherowo

High quality of life

The region and the city of Gdynia have been at the top of the quality of life rankings for many years.

For many citizens, the Pomeranian province is an ideal place to live, work and retire. A few elements affect this situation. Most of all, the region is known for its perfect, unique nature and tourist attractions, a wide shoreline and many kilometres of open sandy beaches and

relatively low air pollution. Problems with smog, so common in other regions of the country, are practically unknown here. A developed network of connections both with the rest of Poland and Europe is yet another advantage.

When it comes to Gdynia and Northern Kashubia the increase in the quality of life is partly caused by the effective work of the local municipalities in key infrastructure development areas, including transportation [roads, public transportation], social issues [schools, nurseries, pre-schools], sports activities [stadiums, swimming pools, sports halls] and culture [new culture centres, club rooms, libraries, museums, the revitalisation of public squares]. A huge share of these investments comes from exterior sources. The total value of projects financed by the EU and by the NORDA Forum municipalities in 2015 is estimated at over PLN 1.16 billion [according to GUS].

These local activities have been recognised by many awards and titles in Poland and abroad.



Event for mothers and children in the "Fabryka Kultury" in Reda

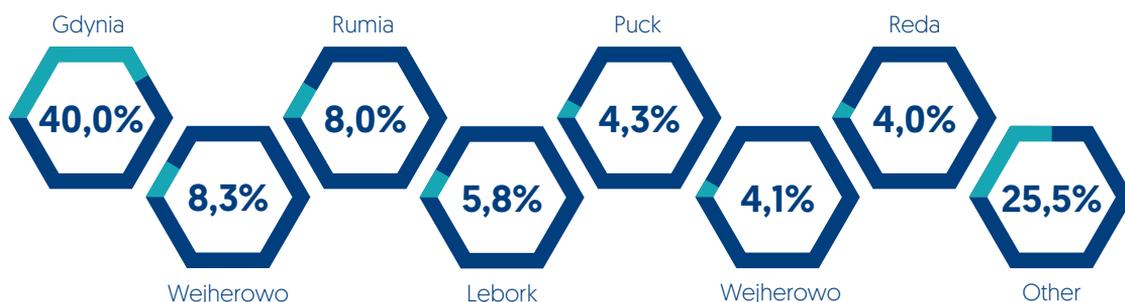
Human capital as an advantage for NORDA

Demographics

Population

Human capital is an indicator of regional competitiveness in the context of the development of an economy based on knowledge. The NORDA Forum area is populated by 617,000 people. This is nearly 27% of the population of the Pomeranian province and 1.6% of Poland's population. More than 40% of the population lives in Gdynia.

Division of population into cities and municipalities for the NORDA Forum area 2015



Source: Developed by Gdynia Development Agency on the basis of Central Statistical Office data [BDL GUS]

61.8% of the population in the NORDA Forum area is of working age. This is slightly lower than the average of the Pomeranian population [62.2%] and Poland [62.4%]. The largest share of the population of working age live in Reda [66.2%], the Kosakowo municipality [65.2%] and Hel [64.5%].

The largest population density is to be found in city areas of the NORDA Forum area – Puck, Wejherowo, Gdynia and Rumia. The density is more than 1,500 people per km² in those areas. The lowest population density of the NORDA Forum area, with less than 50 people per km² can be found in municipalities at the borders of the province – Łęczycze, Krokowa, Przywidz, Liniewo, Gniewino, Karsin and Choczewo.



Inauguration ceremony of a new academic year at the University of Business and Administration in Gdynia

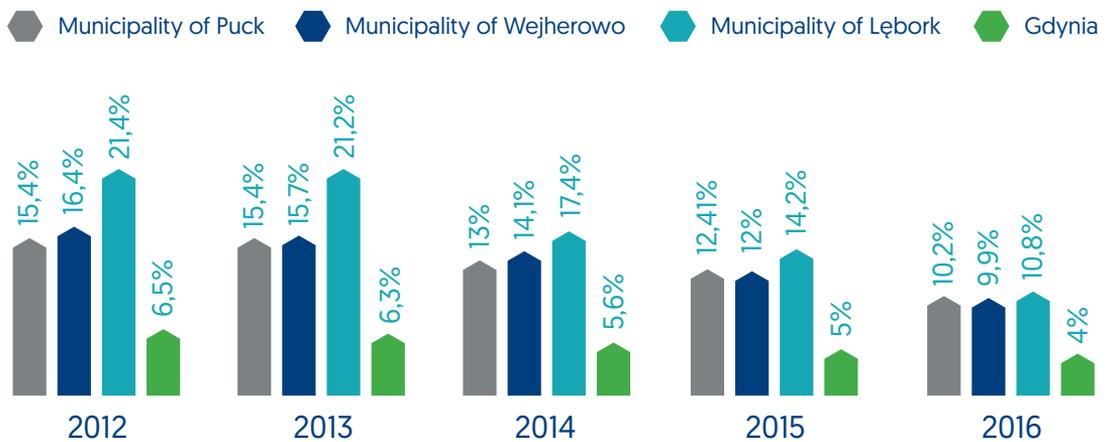
Even though Poland is experiencing depopulation [1.1% fewer people lived in Poland in 2015 than in the previous year] in Pomerania this is not the case because of the high quality of life. During the same time period the population of Pomerania has increased by 2.6%, giving Mazovia the first place [2.7%]. In the NORDA Forum area the most dynamic growth, because of suburbanisation, can be found among the population of municipalities that surround the metropolitan area. It should be noted

that the Kosakowo municipality has increased in population by nearly 4% since 2014. Dynamic growth of 2% has also been experienced by the rural municipalities of Wejherowo and Reda as well as Szemud and Luzino. The population of border municipalities is decreasing at the fastest rate, with Hel and Jastarnia as the most prominent cases. The young population of these places has decided to move to the city.

Labour market

The situation in the labour market is better than it is in the rest of the country. At the end of December 2016 the unemployment rate in Pomerania was 7.3% (fifth lowest in Poland), while the average in Poland was 8.3%. During the last five years the unemployment rate in the Pomeranian province has dropped by 5 percentage points. The dynamic of the decrease of the unemployment rate has been more noticeable than in the rest of the country.

Unemployment rate in the NORDA Forum municipalities 2012-2016



Source: Developed by Gdynia Development Agency on the basis of Central Statistical Office data [BDL GUS]

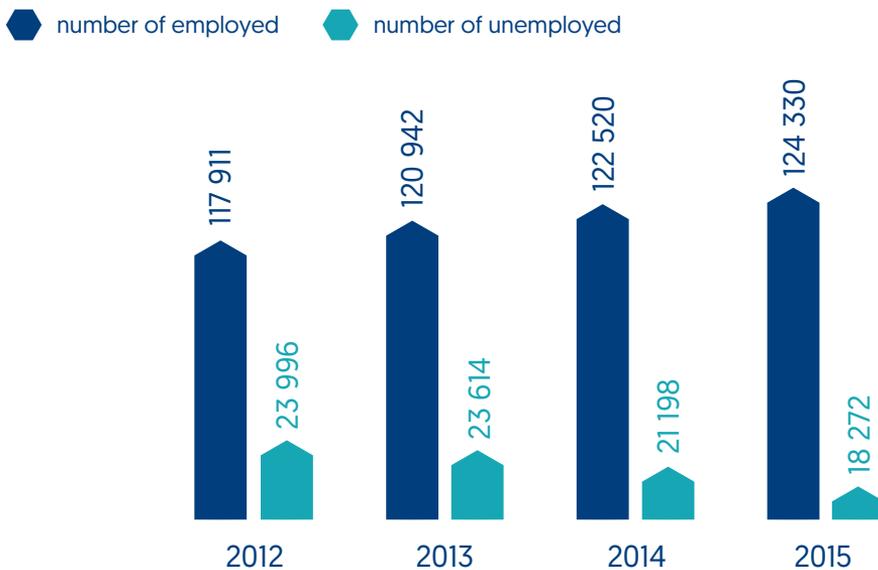
The lowest recorded unemployment rate in the NORDA Forum area is in Gdynia [4%]. In the case of Wejherowo powiat in 2016 the rate was 9.9%, in Puck 10.2% and in Lębork 10.8%. This data signifies that the labour market in the NORDA Forum area is similar to that of the whole region.

In 2015 in Pomerania 9,400 among the 77,700 registered unemployed people had a higher education. This number was significantly lower than in recent years. Young graduates should not be treated as

a unified group, however. Their situation on the market when it comes to employment and salary is varied according to education studies that they have completed. This disproportion is clearly seen in the number of students employed 6 months after graduation – in 2015 85% of Gdańsk University of Technology graduates found a job compared to only 61% of their colleagues from the University of Gdańsk.

The number of people working in the region and in the NORDA Forum area provides evidence about the good condition of the labour market. In 2012 118,000 people worked in the NORDA Forum area and by the end of 2015, the number reached 124,000. The number of people employed in the NORDA Forum municipalities has increased by 5% from 2012 to 2015. The growth of the labour market has been mainly affected by the increase in the number of job offers and the number employed in the service sector in the whole province [nearly 9% in 5 years]. What is important is that more and more people are employed in the industrial sector.

The number of employed and unemployed in the NORDA Forum municipalities



Source: Developed by Gdynia Development Agency on the basis of Central Statistical Office data [BDL GUS]

A very high increase in the employment of citizens of foreign countries is a trend characteristic of the Pomeranian labour market. At the beginning of 2014 only 200 foreigners were registered in the region. Today there are officially 7,000 foreigners working in the province. More than 90% of them are from Ukraine and 7% from Belarus. They have found jobs in the construction and industry sectors as well as in services. In the case of services, Ukrainian IT employees are especially valuable as they solve the problem of lack of qualified IT specialists in the Pomeranian region.

Business and social activity

This division could be the result of the extraordinary business skills of the citizens of Pomerania but it may also be connected to the tourist aspects of the region - many small food, accommodation and commercial enterprises open as the summer starts. This is clearly visible in the NORDA Forum region, where the highest level of entrepreneurial activities is characteristic for seaside communes. The indicator of entrepreneurship [no of

entities per 1000 inhabitants] is highest in Jastarnia [299], Władysławowo [245] and Hel [178]. A high level of enterprise can also be found in Gdynia [156], which combines the benefits of a seaside location with the character of a large city, where enterprises develop more naturally and dynamically than in other places. These tendencies are backed up by the number of people who create their own companies per 1000 citizens.

The NORDA Forum area is characterised by the high social activity of its citizens. This can be seen in the number of foundations, associations and social organisations compared to the number of citizens, which is higher than in the rest of Poland and the Pomeranian province. When it comes to this indicator, Łeba is at the top [6.9 organisations per 1000 people] and Puck [5.6], but Wicko [4.5], Hel [4.3], Krokowa [4.0] and Gdynia [3.9] are not that far behind [2015 data].





IT Secondary School in Puck

Course for education and science

Education is one of the key factors determining the investment attractiveness of areas. The presence of high quality educational and training infrastructure affects the quality of the human, structural, social and relation capital. Municipalities want to increase their chances of generating new knowledge, ideas and projects as well as attracting more investment into their areas.

Pre-school and early education

Many scientific inquiries point to the fact that pre-schools are of key importance in the education of young people. The highest percentage of children in pre-schools in the NORDA Forum region can be found in cities and towns of Puck, Rumia, Gdynia, Reda, Wejherowo as well as in the Lębork powiat. In those places the percentage of children aged from 3 to 5 that attend pre-schools exceeds 80%, the average in the Pomerania

province. The availability of pre-schools is much lower in rural areas.

The gross enrolment ratio for primary schools mirror these trends. Cities are also at the top of this ranking – mainly Łeba, Puck, Rumia, Lębork, Reda, Wejherowo and Gdynia, where many students come from neighbouring municipalities.

Secondary education

When it comes to assessing the workforce levels of the NORDA Forum area, secondary education is very important, this includes vocational secondary education, as well as general education, which points to the number of people who want to continue their education. In 2015 there were 36 secondary schools and 19 vocational schools in the NORDA Forum area. The number of students who attended them attained 8,500 and 3,100 respectively.



In order to assess the quality of education in those schools we need to observe the results of final exams. In the context of high school graduation exams, secondary schools and technical schools from Gdynia are the best, the number of students that pass the compulsory exams is 86%. This is higher than in the rest of the country by 7 percentage points. Secondary schools from the Łębork and Wejherowo with a 75% pass rate were second [2016 data].

The Grammar no 3 – named Polish Naval School - in Gdynia has for years been at the top of the best Polish school rankings. The school offers the possibility of taking final exams in two languages. Since its inception the school has hosted many talented students from all over the country. The graduates of the school studied and are studying at the best Polish and world universities, including the Jagiellonian University, Sorbonne, Oxford, Cambridge, MIT, Columbia, Harvard and Yale.





Modern educational infrastructure, as well as a high level of learning skills is characteristic to the Maciej Płażyński School Complex in Puck. It closely co-operates with Gdańsk University of Technology, the University of Gdańsk and the Pomeranian Special Economic Zone. The school was founded by the “Pozytywne Inicjatywy” foundation created by a group of Puck municipality citizens who wanted to change the environment and their community for the better. Their efforts translated into a network of pre-schools in the Puck and Wejherowo municipalities, a network of tens of nurseries in the province and the centre for social integration in Puck.

The Gdynia Entrepreneurship Support Centre conducts the “Junior Business” contest. Its aim is to motivate young people to actively help the local community, create team skills, learn about the basic principles of economics, motivate creativity and innovation as well as shaping practical business attitudes. The contest includes workshops on project management, public performance and idea presentation as well as film workshops. At the end of the contest the jury chooses the best business concept and the best short film on the topic: “What does it mean to be an entrepreneur?”.



The passing mark for vocational schools in the Pomeranian province slightly exceeds 70% [2016 data]. The most popular qualifications were: sales management, production processes, resource and information flow organisation and control, storing and distribution, activity planning and performance within an organisation, personal computer and personal device installation and use, local computer network design and administration, meal and beverage preparation as well as care services for sick and dependant people. The maritime tradition of the region means that many young people are learning [also in vocational schools] how to perform such occupations as qualified port workers, transport specialists, construction workers, welders, locksmiths and sailors.

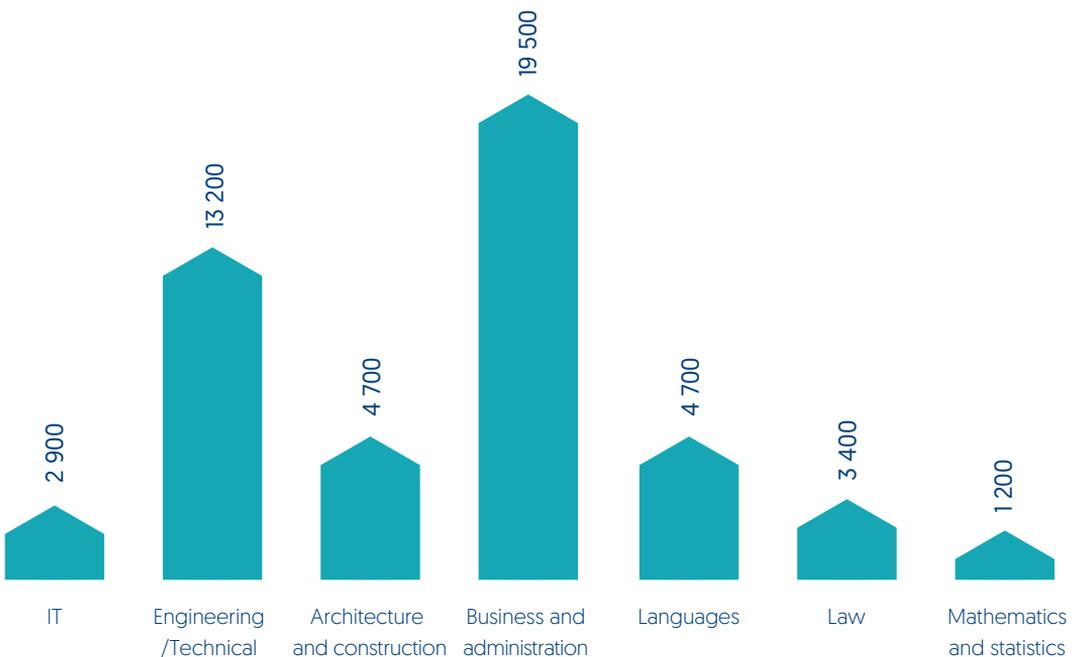
Higher education

The availability of a qualified work force, including graduates of higher education facilities, is the key to investment in the service sector that plan to locate their business in the NORDA Forum area. They can then use the resources of local, Pomeranian higher education institutions.

Nine institutions functioned in the NORDA Forum area in 2016. 13,000 students attended these schools. At present, there are 27 higher education institutions in the Pomeranian province with 96,000 students.

Investors value the students of courses such as business and administration, IT, technical engineering, architecture and construction sciences as well as languages, law, mathematics and statistics. The number of these assets, for the Pomeranian province as well as the sphere of influence of the Tricity area, is extraordinary.

Students of select courses in the Pomeranian province in 2015



Source: www.investinpomerania.pl



The most notable higher education facilities in the NORDA Forum region are the Gdynia Maritime University and the Polish Naval Academy in Gdynia. In the context of the province and the country, some institutions are held in particularly high esteem, such as Gdańsk University of Technology, the University of Gdańsk and Gdańsk Medical University.

Gdynia Maritime University

A school with long traditions founded in 1920, the Gdynia Maritime University is inseparably linked to Gdynia and its maritime roots. This is the largest maritime school in Poland and one of the largest in Europe. It educates future officers of the commercial fleet and qualified specialists in maritime economy. The University co-operates with the most important institutions of the maritime economy in the region and provides full infrastructure including 900 accommodation places in dormitories, a swimming pool, a dining hall and a career office. The Gdynia Maritime University owns two training vessels: the globally recognisable sailing ship “Dar Młodzieży” and a modern science-training vessel “Horyzont II.”

Polish Naval Academy

The most famous military academy in Poland is located in Gdynia, near the biggest Polish naval port. The Academy educates military and civil students as well as naval personnel. Its structure consists of four departments: Faculty of Navigation and Naval Weapons, Mechanical and Electrical Engineering, Command and Naval Operations and the Humanities and Social Sciences. Additionally, three intra-departmental units function at the Academy to enrich the educational offer with foreign languages, maritime issues and general military education.



Bracia Bertrand Sp. z o.o. Sp. k. window factory in Luzino

Business support

A wide range of appropriately qualified employees is possible because of numerous job placement agencies and the Labour Office in Gdynia, which is responsible for the professional development of the city's citizens. In 2001 the National Labour Office and Gdynia City Hall created the "Pomeranian Professions Advisory Center" ["Pomorskie Miasteczko Zawodów"] initiative. This modern programme offers free assistance to the

citizens of Gdynia and the Pomeranian province – the unemployed, graduates, those seeking jobs and seeking to acquire new qualifications and start their own companies. The programme is part of the city "Enterprising Gdynia" initiative whose aim is to activate society professionally and counteract unemployment. The Gdynia Entrepreneurship Support Centre was also founded as part of this programme in February 2007.

2010 has seen the foundation of another innovative initiative, the DNV Academy Gdynia, the first Training Centre in Virtual Reality. The Centre is equipped with an interactive simulator for maritime personnel training with the use of 3D models and stereoscopy technology visualisations.

Adjustment to the labour market

Vocational and technical schools should closely cooperate with local business to adjust the educational system to the needs of the labour market by providing educated personnel in the future. In this context it is vital to create the educational programme with assistance from employers and to include them in the vocational practice planning and practical lessons.

You can find numerous examples of education offers at the secondary school level which are compatible with the needs of local businesses in the NORDA Forum area. The Vocational Training Center no 1 [“Centrum Kształcenia Zawodowego i Ustawicznego nr 1”] in Gdynia trains its students e.g. in ship building, and port and terminal maintenance. The manufacturer of luxurious catamarans - Sunreef Yachts, co-operates with the centre when it

comes to yacht woodworking training. School Complex for Food and Crop Sciences [“Zespół Szkół Gospodarki Żywnościowej i Agrobiznesu”] is located in Lębork, this suits the economic environment of the region. Its graduates find their place in numerous fruit, vegetable and meat processing plants throughout the region.

ENBIO TECHNOLOGY Sp. z o.o. in Kosakowo





Traditional shipbuilding workshop – Jacek Struck, Jastarnia

The Puck Vocational Training Centre [“Powiatowe Centrum Kształcenia Zawodowego i Ustawicznego”] educates adepts and specialists in future small ship design, construction and repair works. All of this is possible because of the shipbuilding workshop founded in September 2015. Shipbuilding and fishing are historic, traditional sectors of the local economy. The Puck poviát has the largest number of specialists from this sector. The poviát’s coast line is the longest in the country. Another example that needs to be noted is the non-public craft school in Wejherowo, organised by the the Crafts

Guild for Small and Medium Companies [“Powiatowy Cech Rzemiosł Małych i Średnich Przedsiębiorstw”]. The school produces professionals who are in demand on the job market and allows people to easily re-qualify in accordance with present market requirements. The educational offer guarantees the high probability of finding a job in local companies and gives the region qualified employees in various sectors. The school’s offer includes training for such professions as barber, carpenter upholsterer, car mechanic and metalworker [tinsmith].

The Secondary School Complex No 2 in Wejherowo [“Zespół Szkół Ponadgimnazjalnych Nr 2”], popularly called the “Electrician” [“Elektryk”], is widely known in the region. The “Perspektywy” magazine’s ranking of 2016 deemed it to be the second most highly recognised technical school in the Pomeranian province. This is a place of education for such sectors as: ICT, electronics as well as energy and ecological energy. The school is equipped with e.g. an atomic and nuclear workshop, which aim is to share knowledge about nuclear energy. The workshop is part of a project called: “Centre for support of professional development of future employees of the first nuclear plant in Poland.”

The School Complex in Wejherowo [“Powiatowy Zespół Szkół Policealnych”], on the other hand, tries to face the challenges connected with the pan-European trend of social ageing. The addition of a rehabilitation complex to the school provides better educational conditions for future health and care personnel, e.g. disabled assistants, social help carers and medical assistants.

Gdynia is also introducing proper vocational education patterns, which acquired PLN 51,9 million from the Marshall

Office in Pomerania for the “Development of vocational education in Gdynia” project. The overall value of the project exceeds PLN 70 million. The Gdynia Maritime University is another example of a school that adjusts its educational offer to the needs of employers. In May 2016 the University started a co-operation with Rolls-Royce of Poland in order to train the students of the Mechanical Department in the Ship and Port Equipment Repair Technology speciality.



Secondary School Complex no. 2 in Wejherowo, widely known as the “Electrician” [“Elektryk”]

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