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**GDYNIA
TECHNICAL ASSISTANCE IN
STRATEGIC/ECONOMIC DEVELOPMENT PLANNING**

POLAND

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**Prepared for the Office of Housing and Urban Programs
U.S. AGENCY FOR INTERNATIONAL DEVELOPMENT**

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ABSTRACT

Under the Local Government and Housing Privatization contract with the International City/County Management Association (ICMA), two specialists in planning and economic development worked in Gdynia from March 25 - April 9, 1993, to review economic development with City officials. The team observed that Gdynia, which is part of a tri-city region that includes Gdansk and Sopot, has several strong attributes but faces re-structuring of its maritime and state-owned industries, which will bring significant economic dislocation. Strategic/economic development planning has already begun through two working groups, which include City staff, elected officials and local consultants. The ICMA consultants reviewed written materials and held several meetings with staff, local consultants, and various public and private individuals representing different points of view on economic development. A half-day workshop, attended by a cross-section of City and business leadership, was organized as an interactive session to identify some common economic and business objectives for the city.

The City has identified a number of broad goals to strengthen the local economy and assist in the shift to a market economy: improve the viability of the port, diversify the local economy, enhance the tourism industry, and build a presence as a regional hub for international trade. The specific issues that were examined included the state of the port, the re-development of vacant and underutilized land, the status of the planned world trade center, a possible business retention and attraction program to include working with business organizations on management and financing needs, the potential for more intensive use of the waterfront, and strengthening tourism. The process by which strategic and economic development planning is being undertaken was analyzed. The report includes a description of the important work ahead for the City in a number of areas, and suggests opportunities for further technical assistance.

EXECUTIVE SUMMARY

Under the Local Government and Housing Privatization contract with ICMA two specialists in planning and economic development worked in Gdynia from March 25 - April 9, 1993, to review economic development issues with City officials. Gdynia is a port city on the Baltic and part of a tri-city region that also includes Gdansk and Sopot. Gdynia was developed in the 1920's, when it served as Poland's only access to the Baltic. The City has a number of strong attributes, including an administration that is competent and stable, and enjoys a progressive reputation among its peers in Poland. The retail and wholesale sectors are well developed. The port has and will continue to play a major role in the economic life of the City, with port-related employment now accounting for 40 percent of employment. Nevertheless, Gdynia faces restructuring of its maritime and state-owned industries, which will bring significant economic dislocation. International trends in shipbuilding and commercial shipping industries, as well as the changing nature of state-managed and owned enterprises, promise the downsizing of these industries.

The City has identified a number of broad goals to strengthen the local economy and assist in the shift to a market economy: improve the viability of the port, diversify the local economy, develop a tourism industry, and build a presence as a regional hub for international trade. Strategic and development planning has begun through working groups, which include City staff, elected officials and local consultants. One group is concentrating on a revised master plan for the City and the other is focusing on economic development issues.

The ICMA consultants reviewed written materials and held a series of meetings with the staff and local consultants responsible for strategic/economic development planning. In addition, the consultants met with a variety of public and private individuals representing various points of view on economic development, including commercial port administrators, small business owners, industrial firm managers, chamber of commerce officials, a hotel manager, and others.

A half-day workshop with 36 participants was held by the consultants, which was designed as an interactive session to identify common economic and business objectives for the City. City officials and staff, businessperson and managers, and academics were represented. One objective of the session was to stimulate discussion and perhaps consensus on some issues. The results of the responses from the attendees suggested cohesion on some major priorities, but lack of clarity on many others.

The specific issues that were examined include the state of the port, the re-development of vacant and underutilized industrial land, the status of the planned world trade center, a possible City business retention and attraction program, work with business organizations on management and financing needs, and the potential for more intensive use of the waterfront and its link to tourism. The strategic/economic development planning process itself was analyzed. Recommendations were made in most of these subject areas, including outside technical assistance that might prove useful.

There are several concrete areas of technical assistance that can be offered to the city of Gdynia. Early response from City leadership indicates particular interest in industrial land use development, waterfront development, and City business retention efforts. The major areas of analysis during this initial ICMA consultancy are described below:

The Planning Process

The strategic planning work done to date has identified the City's development opportunities and drawn logical conclusions about where growth might occur. There is not, however, enough direction from City leadership, either on the staff or official level, given to the various local consultants working on contract. Institutional capacity within City government needs to be built in order that planning and development decisions can be tied directly to the activities of the local government. Further institutional analysis might suggest the reorganization of the planning function of the professional positions of authority responsible for performing specific duties, such as capital expenditure planning. The short-term recommendation is to provide assistance in setting more structure to the local consultants' work, and assigning some achievable timetables for production.

The Port

Gdynia now serves as the only regional port with a sizable and relatively new container terminal. However, the size of ships that can access the port is limited by channel depth and width. There is a logical program of planned capital investments: a new grain terminal, car terminal, free trade zone and passenger ferry terminal. There are two incomplete public works projects that seriously hamper efficient use of the port: an elevated ramp providing direct access to the container and general cargo facilities, and a by-pass to the port from the regional highway. Some firms now choose to ship goods through the Hamburg port and truck to and from Polish destinations, a point which illustrates some of the pricing and marketing challenges the port faces. Recommendations for short-term technical assistance include marketing and organization of the port and analysis of possible infrastructure improvements.

Industrial Land Development

There are large parcels of industrial land now vacant or underutilized. As the fishing industry and shipyards downsize and re-structure, opportunities and costs for re-use need to be examined. A more efficient, reconfigured rail facility may also create additional parcels. At the same time, local firms do not perceive that real estate options exist within the city to accommodate business growth. Technical assistance could help the City to inventory industrial land and evaluate the costs, timing and market for business park-type development of certain sites.

Tourism

Tourist development strategy should be based firmly on market evaluations; tourists are not likely to come to Gdynia as an attraction independent of Gdansk or the larger region. A significant potential sector of the tourism market may well be a business one. There is also potential in more intensively using Gdynia's attractive waterfront for both the traditional tourist and the business tourist. The City has recognized this potential and requested assistance in selling

such a concept to the public, as well as concrete development guidance in marketing an available site near the waterfront (Polanka Redłowska) and upgrading and adding attractions and facilities on the waterfront.

Business and Finance Development

Although the City cannot be expected to fix credit and other obstacles that affect Gdynia firms but are tied to national economic conditions and policies, a basic business retention and attraction effort is achievable. There is keen interest in provision of business management services through existing business organizations, and establishment of a local loan fund. Despite Gdynia's comparatively advanced business and local government organizations, a community development corporation model with a loan fund is currently unrealistic, given both national and local constraints. Short-term recommendations remain focused on building capacity within City government to work more directly with businesses.

International Trade Development

A world trade center is planned; an initial feasibility study has been completed and a prominent City-owned waterfront site has been approved. The City is negotiating with three potential American developers and financing of the construction needs to be identified. A further feasibility study would be especially useful over the next few months in order to better equip the city for negotiations with eventual developers.

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INTRODUCTION

Gdynia is a port city on the Baltic Sea, and is part of a tri-city region which also includes Gdansk and Sopot. Gdynia was developed in the 1920's, when it served as Poland's only access to the Baltic. The City has a number of strong attributes as a location for investment. The City administration is competent and stable, and enjoys a progressive reputation among its peers in Poland. Gdynia has a history as a young and dynamic city, and a higher than average percentage of its property has been privatized. The retail and wholesale sectors are well developed. The port has and will continue to play a major role in the economic life of the City. The architecture of the central city is distinctive (Bauhaus), and the waterfront attractive.

Nevertheless, Gdynia faces re-structuring of its maritime and state-owned industries, which will no doubt bring significant economic dislocation. (The City unemployment rate was reported to be 10 percent at the end of 1992). While port-related employment accounts for nearly 40 percent of employment, international trends in the shipbuilding and commercial shipping industries, as well as the changing nature of state managed and owned enterprises, promise the downsizing of these industries. New businesses, particularly those not in retail, face significant obstacles to growth, and there is concern that the labor force is not prepared to meet the needs of the new economy.

The City has identified a number of broad goals to strengthen the local economy and assist in the shift to a market economy: improving the port, diversifying the local economy, developing a tourism industry, and building a presence as a regional hub for international trade. Strategic and development planning has already begun, under the direction of two general working groups, including City staff, elected officials and local consultants. One of the consultants' tasks was to review generally the work to date of these groups, and suggest next steps. The City Department of Architecture, Planning and Construction has responsibility for a revised master plan for the City (replacing the now unworkable 1988 legal master plan), while the Economic Policy Department is focusing on economic development planning.

The ICMA consultants reviewed written materials, and held a series of meetings with the staff and consultants responsible for strategic/economic development planning. Reports reviewed include: a "State of the City" report (1992), which provides good basic data on housing, infrastructure, employment, recreation and City enterprises; "Basic Principles of Economic Development in Gdynia for the years 1993-1994", which offers brief analyses of specific industries, identifies some new investments, and covers topics such as environmental initiatives and changes in communal housing; an inventory of existing data; a document produced by the economic policy department that offers evaluations of major industries; a "SWOT" analysis chart that summarizes economic, social and environmental strengths and weaknesses; a listing of economic development goals; and conference materials from the Baltic Gateways conference of September 1992.

The Baltic Gateways project is ongoing, and involves cooperation between four port cities (North Tyneside, England, Rostock, Gdynia and Esbjerg, Denmark), largely in the form of exchanged information on shared issues and problems. The report produced for the Gateways Project has

useful information on the port and maritime industries, taken from participants' lectures and discussions. In addition, there are two documents on strategic planning prepared by consultants at the Technical University of Gdansk and local planning firms.

Academic staff from the Technical University of Gdansk is assisting in the economic development work in areas such as port development and recreation and tourism, while local consultants are preparing spatial analyses and identifying opportunities for new growth as part of the master planning process. These outside resources are to work with the appropriate City staff assigned to each of these two efforts.

The ICMA consultants met with a variety of public and private individuals representing various points of view on economic development including commercial port administrators, an official of Polish Ocean Lines, small business owners, industrial firm managers, chamber of commerce officials, a hotel manager, and others. These meetings provided a valuable glimpse of the organizations and businesses and served to round out and test the information received in various written material and from City staff and local consultants. The team also attended a Gdynia Chamber of Commerce forum, the first held on a large scale in Gdynia, to discuss legislative and tax changes.

The team's stay in Gdynia was completed by a meeting with the Mayor, Deputy Mayor, City-board members, and relevant department heads and staff, during which the preliminary report and recommendations were presented and discussed. The City leadership indicated that it would review the specific recommendations for technical assistance and convey its priorities for future work to USAID within the next few weeks.

WORKSHOP RESULTS

A half-day workshop was held by the consultants, which was designed as an interactive session to identify some common economic and business objectives for the city. There were 36 participants; 22 remained for the entire session. City officials and staff, businessperson and managers, and academics were evenly represented. The Economic Policy department took responsibility for crafting the invitation list and quickly organizing the event.

The workshop was structured using four related questionnaires, which team member George Karras has used in working with a wide variety of communities on economic development issues. The first sheet asks participants to characterize the local business climate, and identifies some major categories such as labor, financing and local government. The second requires a comparison of economic development efforts of three years ago and today. The third exercise asks participants to rate the degree to which specific initiatives (identified on the page) would be beneficial. The final sheet requests a prioritization of economic development objectives, assigning numeric weights to each choice. The main objective of the session was to stimulate discussion and perhaps, consensus on some of these issues.

Although the workshop was well attended and there was some spirited discussion at the beginning, the group was not as verbal as had been hoped. It was difficult to glean what the group's commonalities were on the basis of the discussion alone. For future sessions, particularly for a large group unaccustomed to the format, the team recommends either

organizing smaller discussion groups, or simplifying the forms (or perhaps both). Nevertheless, nearly all of the participants completed the forms and some requested more for distribution to others. Although the responses are by no means statistically significant, the aggregate numbers suggest some interesting points:

- For the first exercise evaluating business climate, participants strongly cited labor availability as a strength, with financing and job training availability as major weaknesses.
- The presence of subsidies as special local concessions to certain industries, and the current state of land use regulations were also identified by many as weaknesses.
- The local government's attitude towards business was largely seen as a strength.
- The availability of health care and the efficiency of rail service were viewed as positive contributions to the business climate
- The state of telecommunications, business professional services and highway transportation were seen as strong negatives.

The second sheet, which required a comparison of local and wojewodstwo (regional) efforts of three years ago and current, is the most significant for what it says and what it does not say. While by no means an indictment of today's efforts, it is also not a ringing endorsement. In the "present" rating column, there were only a smattering of selections under the heading "excellent". Although the ambivalence is most likely a reflection of the political environment nationally, there were some interesting observations for Gdynia. Efforts at economic diversification, housing privatization initiatives, effectiveness of transforming to a market economy, and the flexibility of master plans showed substantial improvement. The performance of regional and state government in improving business climate, the participation of small businesses in economic life, the effectiveness of tourism development efforts and cooperation with neighboring communities showed modest improvement. The transfer of ownership of state enterprises, lending policies of banks, and the participation of dominant businesses in economic development activities, were perceived to deteriorate over the three year period.

Responses to the third questionnaire, requesting a rating of the relative beneficial effects specific programs are likely to have, generally support the direction the City has identified in its economic development objectives (and some of the technical assistance recommendations). Leading choices under the "very beneficial" category include vocational and technical training programs, the donation of land as an industrial location incentive, provision of industrial facilities, the improvement of highways, the development of facilities to serve small industrial firms, and the provision of marketing and improved services for the port. Several respondents noted the need for major telecommunications improvements as likely to be most beneficial.

The final page, which asks participants to rank objectives on a scale of 1-100, is the most difficult from which to draw conclusions. (A number of respondents devised individual weighing schemes; this page should be redesigned if used again for similar work). Despite the statistical problems, a few clear priorities did emerge, if only suggestive. Increasing the

availability of financial and other industrial location incentives and developing facilities suitable for small businesses were among the top five objectives chosen by more than 15 participants. Others in the top five category included improving financing mechanisms for small businesses, improving public attitudes and support for development plans, and strengthening maritime and port activity.

CRITICAL FINDINGS

The Planning Process

The strategic planning work done to date has identified the city's opportunities and drawn logical conclusions about where growth might occur. The two departments responsible for oversight of the consultants' work are involved in the technical work, and understand the issues well. However, there does not appear to be enough policy direction from City leadership, on the staff or official level, given to the various local consultants working on contract. A clear timetable, with benchmarks for public review, is not apparent. The work should be driven with some straightforward assumptions and desires about the directions the City wants to take, and how the planning work fits in with real City investments and plans.

The team sensed that the various experts were, at times, functioning in a vacuum. Is the master plan primarily a zoning tool, an summary of the City's physical development goals, a guide for private investment, or all three? How will it be used? What are the master plan's basic assumptions: Is more residential development desirable, does the City want more intensive development of the waterfront, does the City want to curtail certain basic uses, etc.? How are the basic goals identified by the City (stronger port, more international trade, more tourism, and so on) translated into the master planning effort? Similarly, how is the economic development (strategic) planning tied to the master planning? How will the strategic planning be implemented?

The consultants are certain that staff and the political leadership can answer the above questions, and indeed did, when asked directly. However, the purpose and functions of the planning work were not easily comprehended when the material was initially presented by staff and consultants. Answers to the questions asked above should be clear in the planning work. The ability to use the plans and to explain them to the public, demand clear articulation of goals and functions.

More generally, the team found it challenging to understand the decision-making structure within the City departments regarding capital, economic development, and land use planning. The lack of clarity regarding planning and implementation functions within City government no doubt springs from deeper sources than any simple assessment of staff capabilities, and is not surprising given the major political changes of recent years. A number of individuals noted that the notion of "strategic" and "master" planning, or even planning in general, inevitably conjures up the still recent memory of centralized planning efforts. Still others feel that planning efforts are of minimal use in a rapidly changing political and economic environment, and can only frustrate a local government facing many demands with limited funds. Some stress the primary importance of establishing a stable flow of revenue, and of managing existing City budget expenditures before embarking on ambitious capital or other planning projects.

Capital planning and a City budget, or economic development strategy and revenue, are inextricably linked. The ability of Gdynia to capitalize on and improve existing strengths speaks to the health of the City, and planning efforts can rationalize the expenditure of limited funds. A consensus needs to evolve, with perhaps a new terminology that does not carry the same ideological connotations, but can clarify the planning and implementation roles within Gdynia's local government. A long-term recommendation might propose re-organization of City departments that more clearly suggests planning or implementation functions, along the general lines of many Western European or U.S. models. Creation of a planning department might coordinate the physical, economic development and capital investment planning that is prepared by the City. Other departments or entities would then have the authority to implement or administer development programs.

A serious impediment to consistent and sustained programmatic City initiatives, one which Gdynia officials are well aware of, is the current political system of electing and appointing mayoral and board positions. These individuals have professional positions of authority, responsible for performing specific administrative and programmatic duties, as well as political responsibilities. They can be easily removed by other board members unhappy with a political situation or an administrative one. Short of an overall political solution to this knotty problem of local government instability, professional positions of authority should be created that retain the ability to carry out planning and implementation of projects, protected, at least to some degree, by changes in political leadership.

As will be discussed in the recommendations section, many of these issues represent long-term objectives, and the variety of planning approaches suggest no "right" approach for addressing organization and process issues. However, the ability to provide constructive recommendations in this area will increase over the course of cooperation on discrete tasks and projects.

The Port

The Port of Gdynia is now a shareholding company, with 100 percent of the shares held by the Polish State Treasury, a change introduced in 1991 as part of an overall port restructuring plan. This port entity is responsible for port operations, as well as the maintenance and upgrade of the port infrastructure. Five zone terminals are treated as separate cost centers. Further reform is likely to separate operations from management of the infrastructure. The port administrators are stymied by a lack of legal clarity regarding rights and obligations of both the port owners and port users while national legislation action on port authorities is still in flux. Like many of the businesses the team met with, port authorities claim to be financing long-term capital investments with general revenues.

The origins of the port lie in the handle of coal product for export, and in passenger terminals. The port is operating at 45 percent capacity, and experienced a substantial drop in cargo volume within the last two years. The decline is attributed to the increased competition former State carriers (POL) now face, the economic downturn nationally, instability and change to the former Soviet Union, and the move of general cargo traffic to the Hamburg port. Further, the market for coal is depressed, and the local fishing fleet (principally Dalmor) has seen dramatically lower yields.

Gdynia now serves as the only regional port with a sizable and relatively new container facility. The container terminal, however, does not have deep water access (the channel leading to the terminal is narrow) and that limits the size of ships that can be accommodated. Deepening of the seaways, particularly the Danish Straits, has been identified in various reports as a needed upgrade. An expansion area east of the container terminal has been secured (for container terminal use); the site is a military shipyard no longer in use.

There is a logical program of planned capital investments: a new grain terminal (to be financed by the World Bank), car terminal, free trade zone and passenger ferry terminal. (Free trade zones are planned to be located on some of the underutilized general cargo piers, but legal regulations governing free trade zones have not yet passed.) There are two uncompleted public works projects that seriously hamper efficient use of the port: an elevated ramp providing direct access to the container and general cargo facilities, and a by-pass to the port from the regional highway. The by-pass is opposed by some environmentalists since it would be constructed through an undeveloped, wooded area. Currently truck traffic must detour through residential neighborhoods.

Firms can choose to ship goods through the Hamburg port and truck to and from Polish destinations, a point which illustrates some of the pricing and marketing challenges the Gdynia port faces. The consultants noted that the Gdansk port might function as an ally as well as competitor (Gdansk has no container cargo facilities), and that joint marketing and other activities may be productive since the two ports are so close to one another. The current management structure of the Gdansk port differs from the Gdynia port, however, and most of the Poles to whom this possibility was raised did not think it likely in the short-term.

Industrial Land Development

While the master planning work has identified sites and areas of growth for residential, commercial and office development in the city, it was less apparent that industrial sites had been analyzed for re-development. There are significant parcels of industrial land that are now vacant or underutilized. One example is the "Polifarb" site at the southern end of the city, a 10 acre industrial paint facility with good access to the regional highway. The company, a state-owned enterprise now being privatized, does not use a significant portion of its Gdynia plant. An unfinished building sits on the site. Such a site deserves closer examination, in cooperation with the company, toward the goal of re-configuring the site for eventual use by other firms. While it may be difficult to find a company to occupy all of the land, it may be possible to house a few smaller firms.

The general port area contains a substantial amount of land, and should be a major focus of any industrial land use study. With the back-drop of decline in the fishing and ship construction industries, there is considerable underutilized land in this area. Any future upgrade of an intermodal rail facility may also create additional parcels. A preliminary look at the rail facility near the port indicates substantial underutilization of current tracks. Rational re-use of land will help not only the existing occupants (by more efficiently using production space, and perhaps reducing maintenance costs of large facilities), but could accommodate growing local firms in the future.

Based on the consultants' discussions with some of Gdynia's business owners, local firms do not perceive that real estate options exist within the city to accommodate business growth. If sites exist, their availability is not apparent, or present too many obstacles to successful acquisition. Whether an industrial land use study leads to some future "business park" development, or simply enables the City to properly reflect use objectives in its master planning, the results would be productive.

Tourism

Together with the port and international trade, the development of a tourist industry has been consistently identified as a significant City objective. Indeed, the success of the three economic activities is, to some extent, based on their interconnectedness. Tourist development strategy should be based firmly on the fundamental market reality that tourists are not likely to come to Gdynia as an attraction independent of Gdansk or the larger region. Germans come to visit Gdansk. Scandinavians come for short shopping and sightseeing trips to the region. Poles summer in the Kaszuby lakes region and in Sopot, a neighboring beach town. The City can draw an afternoon or a day, or perhaps in the future even two days of a tourist's time. This is not necessarily a negative; many cities have a substantial tourist market based on such parameters. A recreation and tourism planner from the Technical University of Gdansk noted, for example, that a single "Operation Sail" event, held over a summer week-end in Gdynia, spurred more retail sales than the entire balance of the summer season.

A significant potential sector of the tourism market may well be a business one. Gdynia now draws a substantial portion of its hotel receipts from businessperson in the region on port-related or other business matters. An individual on business wants to be able to spend money in the evenings, or entertain clients. If there is enough of a core of such business activity, then business meeting and hotel facilities could serve this market. There is also great potential in more intensively using Gdynia's attractive waterfront for both the more traditional tourist, and the business tourist.

Although the strategic planning reports have thus far correctly identified existing attractions such as an aquarium, museum, and historic ship as assets, they are not currently strong enough magnets to draw "outside" cash, spent by visiting tourists. The primary pier with these activities is extended by a park-like boulevard, which empties into the heart of the very attractive and lively downtown shopping district, a happenstance that would be the envy of many a city. Attractions need to be enhanced and supplemented; events need to be promoted; physical development of some of the waterfront should be considered (the world trade center is planned for a prominent site on the waterfront).

The City has recognized the waterfront potential. The consultant planner responsible for master planning in the center city core, for example, suggests that a passenger terminal be built closer to this downtown core, and not in the industrial port area. City leadership also noted that there is some public resistance to enhancement of the waterfront, since the waterfront is considered local park land, and used as such by many of the city's inhabitants. (This is not uncommon; when the Baltimore waterfront was redeveloped to include commercial facilities, there was

considerable opposition to the idea of transforming a previously little used open space area on the water). City staff and officials expressed an interest in assistance and information on selling such a concept to the public, as well as concrete development guidance.

Business and Finance Development

Although the City cannot be expected to fix credit and other obstacles that affect Gdynia firms and are tied to national political debates, a basic business retention and attraction effort is achievable. The City should track, and keep contact with local firms, particularly those outside of the relatively well developed retail and wholesale sectors. A direct business service effort, for example, might clarify exactly what kind of real estate needs firms have. Although the City staff appears to have a good relationship with organized business groups, there does not appear to be enough first-hand knowledge of local firm growth, problems and business activity. (Some of the Polish reports noted earlier have data on economic activity that may establish a base of knowledge). Examples of City encouragement of business activity might include, for example, organizing a simple event celebrating the acquisition of a new contract by a business, or the opening of a new facility. The City government could develop an up-to-date inventory of available land and buildings, and market these assets cooperatively with the emerging real estate brokerage industry.

The Gdynia chamber of commerce is a member of the larger, regional Gdansk chamber. The Gdansk chamber was the first organized in the country, following the demise of communist rule. There is also another business organization in Gdynia, with some overlapping membership, and there is talk of merging the two. Membership of these two organizations spoke of challenges familiar to entrepreneurs throughout Poland.

A dominant issue, of course, is financing. The inflationary environment, among other factors, influences business and investment decisions to favor retail and wholesale operations, since they have the highest profit levels. Manufacturers and industrial service sector firms finance growth through cash flow. There was particular unhappiness with the recent drift of tax law, judged to be hostile towards growth. There was keen interest expressed in provision of business management services through the two business organizations, and establishment of a local loan fund, funded through a combination of outside and local sources.

International Trade Development

A pre-feasibility study has been completed for a planned world-trade center and a prominent City-owned waterfront site has been approved as a location by the City board. The land is to be donated. It is envisioned as a major office development, with meeting and public space, various business services, and a teleport. Development of the world trade center is spearheaded by Deputy Mayor Brzeski. A separate non-profit organization has been established to carry out implementation. The non-profit (on behalf of the City) is negotiating with three potential developers (American, as yet unidentified to consultants), financing of the construction needs to be identified. A more in-depth feasibility study would be useful at this point in order to better equip the city for negotiations with developers.

The degree to which Gdynia can be successful in strengthening its position as a center of international trade depends not only on development projects such as the world trade center, but also on the quality of infrastructure notably the regional airport and telecommunications systems, and services such as commercial law and accounting firms. Future consultancies should investigate these needs in further depth.

AREAS FOR FURTHER TECHNICAL ASSISTANCE

The Planning Process

In the short-term, it would be useful to guide City staff and officials in setting more structure to the local consultants' work, and assigning some achievable timetables for products. This would be a work item for a next visit to Gdynia, and would focus on process, rather than the substance of the planning work. However, technical assistance given in the areas discussed below would also have the effect of giving more direction to the master planning and economic development planning work. The industrial land use study, for example, may help with broader land use considerations in designing a master plan. Since the master planning work is already underway, the consultants should work with the City staff responsible for oversight of the master planning to identify those areas that may be affected by more detailed work over the next 6-12 months, such as industrial land use and downtown waterfront planning. A schedule of project-work will need to be done, coordinating all ongoing efforts.

There are clearly more far-reaching recommendations that can be considered regarding the planning process and City government. Some of these issues are discussed in the overview section of this final report. However, understanding the dynamics of any organization, and the people that inhabit it, demands careful observation. Future recommendations will require more familiarity with where decisions are made within specific departments, and how capital planning is linked with strategic and master planning. Although an organizational chart shows the formal assignments and responsibilities, there is not enough information currently on how these identified functions actually operate within Gdynia local government. These insights are best gained through working with staff on particular projects.

The Port

Recommendations for short-term assistance include provision of information on marketing and organization of similarly-sized ports in the U.S., and closer investigation into the matter of the unfinished road improvements. Improved access to the port should be a priority. (Team consultants would need clarification on the status of the funding for the uncompleted ramp.) The by-pass issue involves matters of public support, since there is some opposition, and guidance could be given on "selling" the public works project to the necessary audience. (Responsibility for construction, however, probably lies with the wojewodstwo).

The port has a "sister port" relationship with Baltimore, which is not as active as it had been a year or two ago. The consultants will check the status of this relationship with Baltimore officials. In addition, material was promised from the MARAD federal agency regarding port

development and administration. Since administration of the port is held in hands other than our client, the City of Gdynia, further recommendations will need to focus on issues that the City can effectively influence, or pursue cooperatively with the Port of Gdynia.

Industrial Land Development

Technical assistance is recommended that would allow City staff to inventory industrial land (including ownership, use, conditions) as well as evaluate the costs, timing and market for business park-type development of certain sites. City leadership, at the meeting prior to the consultants' departure, indicated a strong interest in this area of work. The work program could be structured to be a comprehensive survey of industrial land, or focus on a few significant areas or sites, and could easily be a project of several months' duration. Specific tasks would include:

- Mapping ownership, uses and other basic data
- Interviewing users of underutilized land
- Evaluating demand for specific types of industrial facilities and land
- Assessing specific sites — access, size, environmental factors, ownership complications
- Estimating redevelopment costs for specific sites — infrastructure improvements, environmental clean-up, building renovation, acquisition costs
- Developing approaches for marketing private or public industrial land

The project might assist in some of the master planning work now ongoing, and would suggest proactive steps the City could take to make industrial land available to local firms. It might lead to a future industrial park initiative, or perhaps a land marketing program. There is a wealth of pragmatic literature on industrial land redevelopment that could be made available as part of the assistance. This is also an area in which both consultants have much direct experience.

Tourism Development

Within this subject area, a technical assistance project would be targeted toward waterfront development in the central core of the city. As noted earlier, there is general consensus among the planners and City officials that the waterfront area presents some of the greatest potential for increasing tourist revenue from a few well-defined tourist niches. A technical assistance project could be particularly useful in identifying and evaluating specific opportunities. Strategic planning efforts in this area have to date been quite general in nature.

City staff and local consultants should do more "homework" on the existing market and the potential for broader ones. Who uses the existing hotels? For how long of a stay? Do individuals visiting Gdansk on business or as tourists ever stay in Gdynia or vice versa? How many people summer in the Kaszuby and do they ever come to Gdansk for a day or two? Many of these questions are being addressed generally, but planners should go straight to the various providers

of tourist services and facilities to get more specific information on the market. Market data of this nature will help also in plotting a strategy for the waterfront.

Any consultant provided in this area should have a waterfront development background (preferably as developer), and a good native sense of potential market and design. The consultant could suggest possible development models or scenarios, and act as a sounding board for the ideas that have already been suggested by planners. Some of the issues to consider and study include:

- The desired density of development and activity, striking a balance between more intense use of the land and the public's desire for passive open space.
- The relative mix of office, commercial, retail and recreation uses.
- How enhancement of the downtown waterfront could gain public support.
- Identification of infrastructure and other costs for various development scenarios.
- How existing attractions and events might be supplemented or changed to serve as more powerful magnets.

A second substantial area that has the potential to add to tourism and perhaps even convention-type growth is the Polanka Redlowska site. There has been expression of interest in this site, which lies near the Kamienica Gora neighborhood, and contains a defunct hotel complex. Technical assistance should be provided to the City in offering this site for redevelopment.

Finally, many types of written materials from US cities, particularly involving the marketing of events and downtown development projects, should be made available.

Business Development

The primary focus in this area is in assisting the city in setting up some form of local business assistance program. This could begin as a relatively modest effort, and might include:

- Building a base of knowledge on existing business assistance programs in the country and region, to pass on to local firms.
- Visiting local firms to gain first-hand knowledge of the companies and inquire about assistance needs.
- Establishing a data base (to the extent possible) of companies, employment, type of business and start-up firms.
- Forging relations with any regional business or economic development organizations.

- Developing relations with bankers, accountants, and others servicing new firms, which are frequently good anecdotal sources of information on the local economy.
- Acting as a clearinghouse for requests for City services, infrastructure upgrades, etc.
- Issuing a periodic economic development newsletter.

Specific technical and organizational assistance can be provided in creating the staff capacity to perform these tasks. Experience in these types of interactions with businesses will lead to the future organizational capability to take on larger projects, such as business park development or public sector lending. This is an area in which the team consultants have direct experience.

International Trade Development

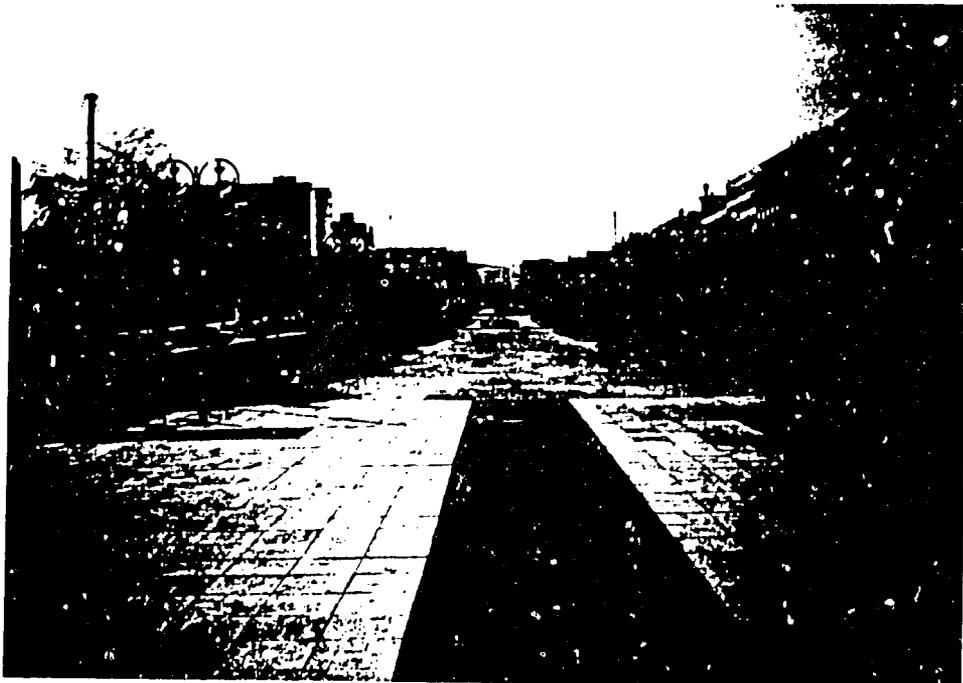
The proposed world trade center, both as a real estate project and as a trade program offering services and information, is the focus of an initiative to strengthen the City's international trade status. While there are a number of tangential issues that are worthy of further study and evaluation, there is an immediate need to better equip the non-profit representing the City's interests in its ongoing negotiations with three American developers. The pre-feasibility study concentrated largely on design and building issues. A more in-depth financial analysis is needed within the next months. The team discussed with Gdynia officials and USAID staff in Warsaw the possibility of funding work in this area through an existing USAID contract.

ANNEX 1
MAP AND PHOTOGRAPHS

View of Kosciuszko Square, main pier and Dalmor fishing facility



Kosciuszko Square, looking west to 10 Lutego and Swietojanska



View from Kosciuszko Square looking toward Bay of Gdansk on the Aleja Zjednoczenia



Unfinished access road to port; container facility in background



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ANNEX 2
QUESTIONNAIRE

4. ECONOMIC DEVELOPMENT OBJECTIVES AND THEIR PRIORITIES

The following represents a set of possible development objectives. We wish to establish the **priorities** among these objectives based on your opinions about their relative importance. To help us please assign the weight (or score) of 100 to the objective you rank as most important. Then assign other weights to the remaining objectives. Since the most important objective was **scored 100**, the other scores will be progressively less than 100.

Objective	Priority Score
◆ increase availability of financial and other industrial location incentives	_____
◆ Enhance skill training programs and their linkages with industry	_____
◆ Increase inventory of industrial building and developed land	_____
◆ Improve entrepreneurial opportunities, especially for unemployed workers and managers	_____
◆ Improve financing mechanisms and increase capital pool for smes	_____
◆ Develop facilities suitable for small businesses which will help to diversify economy	_____
◆ Improve area transportation network highway rail air	_____ _____ _____
◆ Improve quality of area water and sewer systems	_____
◆ Improve recreation facilities and access to park areas	_____
◆ Increase efforts to diversify economy	_____
◆ Strengthen economic development planning capabilities	_____
◆ Develop and implement improved area specific industrial marketing and recruitment program	_____
◆ Strengthen trade linkages between Gdynia and other cities including Gdańsk	_____
◆ Complete privatization of housing	_____
◆ Strengthen maritime and port industries	_____
◆ Increase attention to stabilising and expanding existing businesses	_____
◆ Please feel free to add any rate and other objective you feel should be included	_____
_____	_____

Please characterize each of the following climate factors in terms of their present status. MARK x

FACTOR	RATING AT PRESENT		
	WEAKNESS	DON'T KNOW	STRENGTH
LABOR			
Availability of skilled workers	_____	_____	_____
Availability of unskilled workers	_____	_____	_____
Labor costs	_____	_____	_____
Job training/vocational education programs	_____	_____	_____
FINANCING			
Availability of long-term financing	_____	_____	_____
Availability of short-term financing	_____	_____	_____
Cost of financing	_____	_____	_____
TAXES			
Local property tax rate	_____	_____	_____
Corporate tax rate	_____	_____	_____
Personal tax rate	_____	_____	_____
Availability of special concessions/subsidies	_____	_____	_____
LOCAL GOVERNMENT			
Public services (e.g. trash collection, fire protection, etc.)	_____	_____	_____
Public facilities (e.g., sewers, water, etc.)	_____	_____	_____
Quality of schools	_____	_____	_____
Environmental regulations	_____	_____	_____
Attitude of local government toward business	_____	_____	_____
Development and land use regulations	_____	_____	_____
OTHER			
Quality of life	_____	_____	_____
Leadership by local officials and organizations	_____	_____	_____
Crime level	_____	_____	_____
Availability of adequate housing	_____	_____	_____
Cost of adequate housing	_____	_____	_____
Availability and quality of health care	_____	_____	_____
Adequacy of shopping and other amenities	_____	_____	_____
Recreational attractions	_____	_____	_____
Highway transportation system	_____	_____	_____
Rail transportation	_____	_____	_____
Air transportation	_____	_____	_____
Cost of land	_____	_____	_____
Cost of energy	_____	_____	_____
Availability of prepared industrial space	_____	_____	_____
Availability of prepared office space	_____	_____	_____
Adequacy of infrastructure for retirees (health facilities, etc.)	_____	_____	_____
Telecommunications	_____	_____	_____
Business professional services	_____	_____	_____
PLEASE FEEL FREE TO ADD AND RATE OTHER FACTORS YOU FEEL SHOULD HAVE APPEARED ABOVE:			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Each of the subjects listed below is designed to help understand different aspects of the economic development program in Gdynia.

Please rate each subject either poor, fair, good or excellent; first for three years ago and then at present. MARK X.

If the local government in your opinion, had lackluster performance three years ago, you would respond accordingly.

On the other hand, if the local government is now willing to take leadership on important economic development projects, you might indicate that their Present Rating should be good or excellent.

FACTOR	RATING 3 YEARS AGO				PRESENT RATING			
	POOR	FAIR	GOOD	EXCELLENT	POOR	FAIR	GOOD	EXCELLENT
Performance in improving business climate:								
state government	--	--	--	--	--	--	--	--
local government	--	--	--	--	--	--	--	--
Lending policies of banks	--	--	--	--	--	--	--	--
Participation of dominant businesses in economic development activities	--	--	--	--	--	--	--	--
Participation of entrepreneurs and owners of small businesses in economic development activities	--	--	--	--	--	--	--	--
Effectiveness of planning efforts	--	--	--	--	--	--	--	--
Attitude of public toward financing of development projects	--	--	--	--	--	--	--	--
Cooperation with neighbouring communities in development efforts	--	--	--	--	--	--	--	--
Effectiveness of local agencies in obtaining assistance	--	--	--	--	--	--	--	--
Effectiveness of economic development projects (e.g. industrial parks, etc.)	--	--	--	--	--	--	--	--
Effectiveness of tourism development efforts	--	--	--	--	--	--	--	--
Effectiveness of housing privatization	--	--	--	--	--	--	--	--
Quality of master plans	--	--	--	--	--	--	--	--
Efforts of diversification	--	--	--	--	--	--	--	--
Establishing working relationship with business	--	--	--	--	--	--	--	--
Effectiveness of transforming to market economy	--	--	--	--	--	--	--	--
Effectiveness in transferring ownership of state enterprises	--	--	--	--	--	--	--	--
Efforts to increase international trade	--	--	--	--	--	--	--	--

3. PROGRAM RATINGS

Please rate each of the following programs or types of assistance in accordance with the economic benefits you believe they would provide - **by marking X.**

Type of program	Rating of Program		
	not beneficial	somewhat beneficial	very beneficial
Availability of loan funds at slightly below market rates (1 or 2 points below prime rates)	_____	_____	_____
Loan quarantees for ship construction	_____	_____	_____
Vocational/technical training programmes	_____	_____	_____
Entrepreneur training programs and other technical assistance to encourage and support small business start -ups.	_____	_____	_____
Donation of land as an industrial location incentive	_____	_____	_____
Preperation of land for industrial use	_____	_____	_____
Provision of industrial facilities (e.g. speculative industrial buildings)	_____	_____	_____
Improved site selection assistance for firms interested in area	_____	_____	_____
Improved industrial recruitment	_____	_____	_____
Transportation development:			
◆ improve air service	_____	_____	_____
◆ improve highways	_____	_____	_____
◆ improve rail service	_____	_____	_____
Industrial infrastructure improvement (e.g. water and sewer systems)	_____	_____	_____
Commercial infrastructure improvement (e.g. storefront and street improv.)	_____	_____	_____
Improved infrastructure for summer recreation	_____	_____	_____
Develop major tourism facilities and activities	_____	_____	_____
Develop multi - tenant facility (ies) to serve small industrial firms	_____	_____	_____
Develop and recruit non - maritime related industries	_____	_____	_____
Develop business retention program	_____	_____	_____
Provide marketing and improved services for the port	_____	_____	_____
Other (please be specific) :			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

1.
2. Czynniki klimatu do prowadzenia interesu

Proszę scharakteryzować, wstawiając w odpowiednie miejsce znak X, następujące czynniki klimatu do prowadzenia interesów w ich obecnym stanie.

CZYNNIK	OCENA W CHWILI OBECNEJ		
	SŁABOŚĆ	NIE WIEM	SILA
<u>SILA ROBOCZA</u>			
Dostępność wykwalifikowanych pracowników	---	---	---
Dostępność niewykwalifikowanych pracowników	---	---	---
Koszty siły roboczej	---	---	---
Programy kursów/kształcenia zawodowego	---	---	---
<u>FINANSOWANIE</u>			
Dostępność finansowania długoterminowego	---	---	---
Dostępność finansowania krótkoterminowego	---	---	---
Koszty finansowania	---	---	---
<u>PODATKI</u>			
Wysokość lokalnego podatku od własności	---	---	---
Wysokość podatku zbiorowego	---	---	---
Wysokość podatku osobistego	---	---	---
Dostępność specjalnych lokalnych ulg/dotacji	---	---	---
<u>WŁADZE LOKALNE</u>			
Służby publiczne (np. zbiórka śmieci, ochrona przeciwpożarowa itp.)	---	---	---
Urządzenia publiczne (np. kanalizacja, woda itp.)	---	---	---
Jakość szkół	---	---	---
Przepisy środowiskowe	---	---	---
Stosunek władz lokalnych do biznesu	---	---	---
Rozwój i przepisy dotyczące użytkowania gruntów/rejonizacji	---	---	---
<u>INNE</u>			
Jakość życia	---	---	---
Działalność kierownicza lokalnych urzędników i organizacji	---	---	---
Poziom przestępczości	---	---	---
Dostępność odpowiednich mieszkań	---	---	---
Koszty odpowiednich mieszkań	---	---	---
Dostępność i jakość opieki zdrowotnej	---	---	---
Dostępność sklepów i innych ułatwień	---	---	---
Atrakcje rekreacyjne	---	---	---
System komunikacji trasami szybkiego ruchu	---	---	---
Komunikacja kolejowa	---	---	---
Komunikacja powietrzna	---	---	---
Ceny gruntów	---	---	---
Ceny energii	---	---	---
Dostępność przygotowanych terenów przemysłowych	---	---	---
Dostępność przygotowanych terenów biurowych	---	---	---
Jakość infrastruktury dla emerytów (opieka zdrowotna itp.)	---	---	---
Telekomunikacja	---	---	---
Profesjonalne usługi związane z biznesem	---	---	---

PROSZĘ DODAC I OCENIC INNE CZYNNIKI, KTÓRE
 PAŃSTWA ZDANIEM POWINNY TU ZOSTAĆ UWZGLĘDNIONE:

2. Proces rozwoju gospodarczego

Celem poniższego zestawienia zagadnień jest pomoc w zrozumieniu różnych aspektów programu rozwoju gospodarczego w Gdyni. Proszę ocenić każde zagadnienie jako niedostateczne, dostateczne, dobre lub bardzo dobre, najpierw trzy lata temu, następnie obecnie, wstawiając X w odpowiednie miejsce.

Na przykład - pierwsze zagadnienie dotyczy zaangażowania władz centralnych i lokalnych w polepszeniu klimatu do prowadzenia interesów. Jeżeli uważasz, że władze lokalne mało się udzielały trzy lata temu, zakreśl odpowiednią odpowiedź. Jeśli jednak lokalne władze dziś pragną objąć kierownictwo ważnych projektów rozwoju gospodarczego, możesz określić obecne zaangażowanie jako "dobre" lub "bardzo dobre".

CZYNNIK	Ocena 3 lata temu				Ocena obecnie			
	NIE DOB TA TECZ NE	DOS TA TECZ NE	DOB RE DOB RE	BAR DZO	NIE DOB TA TECZ NE	DOS TA TECZ NE	DOB RE DOB RE	BAR DZO
Zaangażowanie władz w stworzenie lepszego klimatu do prowadzenia interesów								
Władze centralne	---	---	---	---	---	---	---	---
Władze lokalne	---	---	---	---	---	---	---	---
Polityka kredytowa banków	---	---	---	---	---	---	---	---
Udział dominujących przedsiębiorstw w działaniach na rzecz rozwoju gospodarczego	---	---	---	---	---	---	---	---
Udział przedsiębiorców i właścicieli firm drobnej przedsiębiorczości w działaniach na rzecz rozwoju gospodarczego	---	---	---	---	---	---	---	---
Efektywność wyników planistycznych	---	---	---	---	---	---	---	---
Stanowisko opinii publicznej w sprawie finansowania programów rozwoju	---	---	---	---	---	---	---	---
Współpraca w działaniach na rzecz rozwoju z sąsiednimi społecznościami	---	---	---	---	---	---	---	---
Skuteczność lokalnych agencji w uzyskiwaniu wsparcia	---	---	---	---	---	---	---	---
Efektywność programów rozwoju gospodarczego (np. parki przemysłowe)	---	---	---	---	---	---	---	---
Efektywność działań na rzecz rozwoju turystyki	---	---	---	---	---	---	---	---
Efektywność prywatyzacji gospodarki mieszkaniowej	---	---	---	---	---	---	---	---
Jakość ogólnych planów rozwoju (master plans)	---	---	---	---	---	---	---	---
Działania na rzecz urozniczenia rozwoju gospodarczego	---	---	---	---	---	---	---	---
Nawiązywanie roboczych stosunków z przedsiębiorstwami-dużymi i małymi	---	---	---	---	---	---	---	---
Skuteczność przekazywania własności przedsiębiorstw państwowych	---	---	---	---	---	---	---	---
Działania na rzecz handlu zagranicznego	---	---	---	---	---	---	---	---
Skuteczność przechodzenia do gospodarki rynkowej	---	---	---	---	---	---	---	---

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B. Ocena programów

Proszę ocenić, poprzez wstawienie znaku X, następujące programy lub rodzaje wsparcia, zgodnie z Państwa przewidywaniami co do przyniesionych przez nie korzyści ekonomicznych.

TYP PROGRAMU	OCENA PROGRAMU		
	Brak korzyści	Fewne korzyści	Duże korzyści
Dostępność funduszy kredytowych o stopie procentowej nieco niższej od rynkowej (1 lub 2 punkty poniżej stopy pierwotnej)	_____	_____	_____
Gwarancje kredytowe dla przemysłu morskiego	_____	_____	_____
Gwarancje kredytowe dla pozostałych gałęzi biznesu i handlu	_____	_____	_____
Programy szkolenia zawodowego/technicznego	_____	_____	_____
Programy szkolenia przedsiębiorców oraz inne sposoby stymulacji i technicznego wspierania inicjatyw drobnej przedsiębiorczości	_____	_____	_____
Darowizny terenów jako bodziec stymulujący rozwój przemysłu	_____	_____	_____
Przygotowanie terenów na użytek przemysłu	_____	_____	_____
Zabezpieczenie urządzeń przemysłowych (np. spekulacyjne budynki przemysłowe)	_____	_____	_____
Zwiększona pomoc w wyborze lokalizacji dla firm zainteresowanych terenem	_____	_____	_____
Polepszenie rekrutacji w przemyśle	_____	_____	_____
Rozwój komunikacji:			
* Powietrzna	_____	_____	_____
* Trasy szybkiego ruchu	_____	_____	_____
* Kolejowa	_____	_____	_____
Poprawienie infrastruktury przemysłowej (np. systemów wody i kanalizacji)	_____	_____	_____
Poprawienie infrastruktury handlowej (np. powierzchnie magazynowe, przebudowy ulic)	_____	_____	_____
Poprawienie infrastruktury dla letniego wypoczynku	_____	_____	_____
Rozwój podstawowej bazy turystycznej	_____	_____	_____
Rozwój bazy dostępnej dla wielu dzierżawców, do wykorzystania przez małe firmy przemysłowe	_____	_____	_____
Rozwój i stymulacja przemysłu nie związanego z morzem	_____	_____	_____
Opracowanie programu mającego na celu utrzymanie przedsiębiorstw w regionie	_____	_____	_____
Zapewnienie marketingu i lepszych usług na rzecz portu	_____	_____	_____
Inne (konkretnie):	_____	_____	_____

4. Cele rozwoju gospodarczego i ich priorytety

Poniższa tabela jest zestawieniem możliwych celów rozwoju gospodarczego. Chcemy ustalić priorytety w ramach tych celów, w oparciu o Państwa zdanie o ich względnej istotności. Proszę przypisać ocenę 100 celowi, który Państwo uważają za najistotniejszy. Następnie proszę przypisać odpowiednie oceny pozostałym celom. Najistotniejszy cel ma ocenę 100, pozostałe oceny będą więc odpowiednio niższe od 100.

CEL	OCENA PRIORYTETU
* Zwiększenie dostępności finansowych i innych bodźców stymulujących lokalną rozbudowę przemysłu	_____
* Rozszerzenie programów doskonalenia zawodowego i ich związków z przemysłem	_____
* Zwiększenie zasobów budynków przemysłowych i terenów uzbrojonych	_____
* Zwiększenie możliwości rozwoju przedsiębiorczości, zwłaszcza wśród bezrobotnych pracowników i menedżerów	_____
* Poprawienie mechanizmów finansowania i zwiększenie puli kapitału dla małych przedsiębiorstw	_____
* Stworzenie udogodnień dla małych firm, co umożliwi zróżnicowanie gospodarcze	_____
* Poprawienie lokalnej sieci komunikacyjnej	
Trasy szybkiego ruchu	_____
Kolej	_____
Transport powietrzny	_____
* Poprawienie jakości lokalnych systemów ścieków i wody	_____
* Rozwój bazy rekreacyjnej i dostępności terenów parkowych	_____
* Zwiększenie wysiłków na rzecz zróżnicowania gospodarki	_____
* Zwiększenie możliwości pianistycznych rozwoju gospodarczego	_____
* Zwiększenie poparcia publicznego dla planów rozwoju	_____
* Opracowanie i wdrożenie poprawionego programu marketingu przemysłowego i zatrudnienia, dostosowanego do lokalnych warunków	_____
* Umocnienie więzi handlowych między Gdynią a innymi miastami, w tym z Gdańskiem.	_____
* Doprowadzenie do końca prywatyzacji gospodarki mieszkaniowej	_____
* Umocnienie przemysłu morskiego i portowego	_____
* Zwrócenie uwagi na stabilizację i ekspansję istniejącego przemysłu	_____
* Proszę dodać i ocenić inny cel, który Państwa zdaniem powinien zostać uwzględniony:	_____

ANNEX 3
LIST OF CONTACTS

- Ms. Franciszka Cegielska
City Mayor
- Dr. Maciej Brzeski
Deputy Mayor
- Mr. Stanislaw Szwabski
City Board Member
- Mr. Jan Wasilewski
Economic Policy Department
- Ms. Malgorzata Dehmel-Gomerska
Economic Policy Department
- Ms. Wieslawa Martynska-Ostrowska
Head of Urban Planning and Architecture Department
- Mr. Michal Zolnierkiewicz
Urban Planning and Architecture Department
- Mariusz Czepczynski
Economic Policy Department
- Mr. Krzysztof Zajac
Consultant to Urban Planning and Architecture Department
- Mr. Jacek Missima
Consultant to Urban Planning and Architecture Department
- Dr. Andrzej Baranowski
Technical University of Gdansk
- Dr. Kolodziejski
Technical University of Gdansk
- Dr. Pankau
Technical University of Gdansk
- Dr. Mieczyslaw Kochanowski
Technical University of Gdansk
- Ms. Elzbieta Goncz
Chamber of Commerce Director
- Mr. Bogumil Kunicki
Business owner and chamber member

- Mr. Roman Hutnik
Business owner and chamber member
- Mr. Wieslaw Dalkowski
Business owner
- Mr. Kostrubiec
Business owner
- Mr. Nowakowski
Business Owner
- Mr. Marek Rembarz
Business owner
- Mr. Wojciech Kossak
Polish Ocean Lines
- Mr. Ryszard Wocial
Port of Gdynia
- Mr. Witold Helman
Port of Gdynia
- Ms. Malgorzata Bancewicz
Travel business
- Manager of Hotel Gdynia