



warmińsko-mazurskie (Warmia and Mazury)

| | |
|---|--------------------------------------|
| Total area of the voivodeship | 24 173.17 km ² |
| Number of citizens: - in urban areas | 1 439 675 citizens 59.33% |
| Population per 1 km ² | 60 persons/km ² |
| Principal city | Olsztyn |
| Bigger cities in the voivodeship | Elbląg, Ełk, Ostróda, Iława, Giżycko |
| Special Economic Zones | Warmia-Mazury, Suwalki |
| Regional Investor Assistance Centre | Olsztyn |

Data: 31 December 2015, Source: Central Statistical Office

Warmińsko-Mazurskie Voivodeship is a region located in north-east Poland, with access to the Baltic Sea through the Vistula Lagoon connecting with Gdańsk Bay - Seaport in Elbląg. Traditionally agricultural voivodeship, called “the green lungs of Poland”, is directed at the development of ecological food production. Timber resources create potential for the development of wood and furniture sector. Higher education intuitions and research and development institutes of the voivodeship have highly specialized staff in the areas connected with the specific nature of the region.

The advantages of the voivodeship:

- Unique natural environment - perfect conditions for development of ecological industry sectors as well as tourism and agri-tourism.
- Human capital - qualified staff and the lowest production costs in Poland.
- The highest level of public aid in Poland and attractive investment locations.
- Gate to the EU market and Eastern markets - external border of European Union with Russian Federation.
- Developing economy and priority sectors: wood and furniture industry, agri-food production, machines and devices production (including yachts and boats), tourism (including medical and business tourism).

Sectors with huge potential

Smart specializations of Warmińsko-Mazurskie Voivodeship according to “The Strategy of Socio-Economic Development of the Warmińsko-Mazurskie Voivodeship until 2025”:

Water Economy

This specialization is based on the biggest in Poland surface water resources, around which tourism has developed as well as many types of activities which also have big innovative potential. Warmia and Mazury are well known for yachts and boats production as well as services connected with this industry. An important factor of development of this specialization is a strong position of research facilities in the field of food production but it should be supported in the area of cooperation with the producers of machines and devices (technical departments). Development of this specialization meets the needs of environmental protection, the area in which the region wants to achieve international importance.

High quality food

This specialization is based on traditionally strong position of agriculture in the region (one of the highest in Poland productivity ratio). Around food production the Warmia and Mazury region has developed very strong scientific specialization in which it achieves remarkable international success and, at the same time, it is an educational and research background for individual companies and clusters. The specialization is based on agri-food industry and dynamic development of local agriculture and traditional food processing based on regional resources, short supply chains and production of food with designed functions. It meets consumers' needs connected with promoted healthy lifestyle.

Timber and furniture

This specialization is strongly based on the region's traditions in which furniture sector and extensive use of timber have been developing prior to the transformation in 1989. The region has remarkable competences in the area of providing raw materials and semi-finished products but most of all, there are production plants located here which provide final products. An important element of this specialization will be further development of design services and creation of the voivodship's brand.

Economic Potential

Gross domestic product in 2014

| | in mln PLN | in % | per capita |
|----------------------|------------|------|------------|
| Poland | 1 719 097 | 100 | 44 670 zł |
| Warmińsko- Mazurskie | 46 222 | 2,7 | 31 977 zł |

Source: Central Statistical Office (preliminary data)

Gross value added by kind of activity (mln) in 2013

| | Total | Agriculture, hunting, forestry, fishing | Industry | Construction | Trade and repair; hotels and restaurants; transport, storage and communication | Financial and insurance activity; real estate, renting and business activities | Other service activities |
|----------------------|-----------|---|----------|--------------|--|--|--------------------------|
| Poland | 1 470 844 | 46 067 | 381 778 | 111 437 | 433 852 | 135 047 | 362 664 |
| Warmińsko -Mazurskie | 39 565 | 2 592 | 10 102 | 2 951 | 9 870 | 3 376 | 10 674 |

Source: Central Statistical Office

Average monthly gross wages and salaries (PLN) in 2015

| | |
|----------------------|-----------------|
| Poland | 4 150,88 |
| Warmińsko- Mazurskie | 3 495,02 |

Source: Central Statistical Office

Local job market

Economic activity of the population aged 15 and more I Q 2016

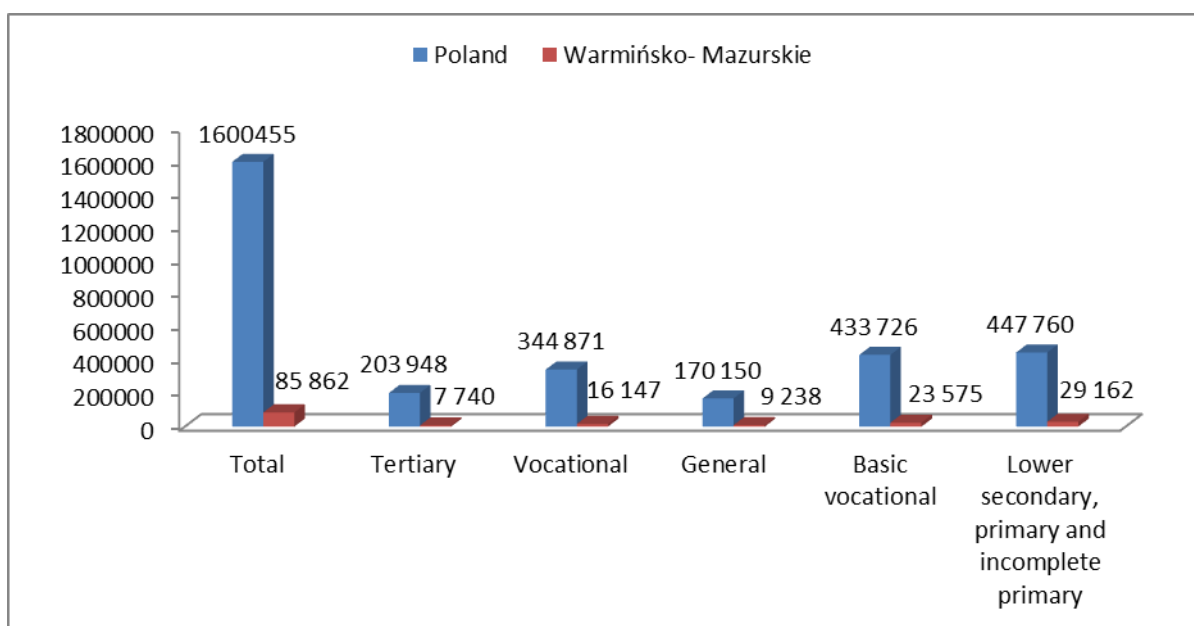
| | Economically active persons (in thous.) | Activity rate (%) | Unemployment rate (%) |
|---------------------|---|-------------------|-----------------------|
| Poland | 17 215 | 56,1 | 7,0 |
| Warmińsko-Mazurskie | 592 | 53,0 | 10,0 |

Source: Central Statistical Office

Registered unemployed persons by educational level in I Q 2016

| | Total | Tertiary | Vocational | General | Basic vocational | Lower secondary, primary and incomplete primary |
|---------------------|-----------|----------|------------|---------|------------------|---|
| Poland | 1 600 455 | 203 948 | 344 871 | 170 150 | 433 726 | 447 760 |
| Warmińsko-Mazurskie | 85 862 | 7 740 | 16 147 | 9 238 | 23 575 | 29 162 |

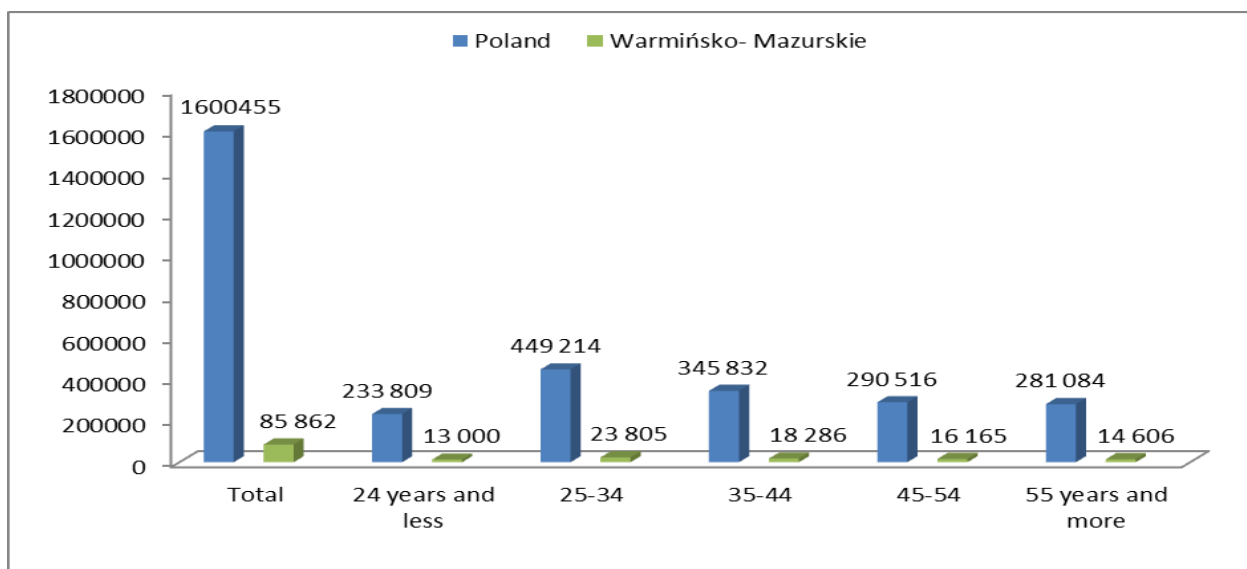
Source: Central Statistical Office



Registered unemployed persons by age in I Q 2016

| | Total | 24 years and less | 25-34 | 35-44 | 45-54 | 55 years and more |
|---------------------|-----------|-------------------|---------|---------|---------|-------------------|
| Poland | 1 600 455 | 233 809 | 449 214 | 345 832 | 290 516 | 281 084 |
| Warmińsko-Mazurskie | 85 862 | 13 000 | 23 805 | 18 286 | 16 165 | 14 606 |

Source: Central Statistical Office



Higher education institutions including non-public higher education institutions

Higher education institutions in 2016

| | Schools | | Students 2015 | |
|---------------------|---------|--------------------|-------------------|-----------------------|
| | public | non-public schools | In public schools | In non-public schools |
| Poland | 134 | 269 | 1 074 760 | 329 034 |
| Warmińsko-Mazurskie | 3 | 4 | 27 984 | 4 936 |

Source: Central Statistical Office; An Integrated Information System on Science and Higher Education

Selected higher education institutions

Warmia and Mazury University in Olsztyn (Uniwersytet Warmińsko-Mazurski)

selected faculties: biology, geodesy and spatial management, humanities, environment and agriculture development, mathematics and computer science, veterinary medicine, economics, social sciences, technical sciences, feeding sciences, environment protection, fish culture, biotechnology, zootechnic, medicine,

State Vocational University in Elbląg (Państwowa Wyższa Szkoła Zawodowa)

selected faculties: administration, economy, pedagogy, philology, IT, construction

Police Academy in Szczytno (Wyższa Szkoła Policyjna)

selected faculties: internal security, administration

Selected investors who have invested in the region

| Firm | Sector | Location |
|--------------------------------------|-----------------------------|---------------------|
| Michelin Polska S.A. | chemical - tyres production | Olsztyn |
| Citi Group | Finance - BPO | Olsztyn |
| Alstom Power | engineering industry | Elbląg |
| Philips Lightning Poland o/ Kętrzyn | electric | Kętrzyn |
| Smithfield Foods | food processing | Ełk, Iława, Morliny |
| Ikea Industry | timber | Lubawa, Wielbark |
| Brehon Capital Ltd.; Golf Investment | golf | Naterki |
| Fin Well Investment Sp. z o.o. | golf | Pasęk |
| Haye & Heinz Glas | glass processing | Działdowo |
| Safilin sp. z o.o. | textile industry | Miłakowo, Szczytno |
| Transcom | Call centre - BPO | Olsztyn |
| Heineken | brewing | Elbląg |
| Animex Food sp. z o.o. | food | Ełk, Morliny |
| Ostróda Yachts sp. z o.o. | nautical | Ostróda |

Useful addresses

Warmia and Mazury Investor Assistance Centre

Warmia and Mazury Regional Development Agency JSC in Olsztyn

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Warmia and Mazury Marshal's Office

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Warmia and Mazury Governor's Office

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The information has been updated by:

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