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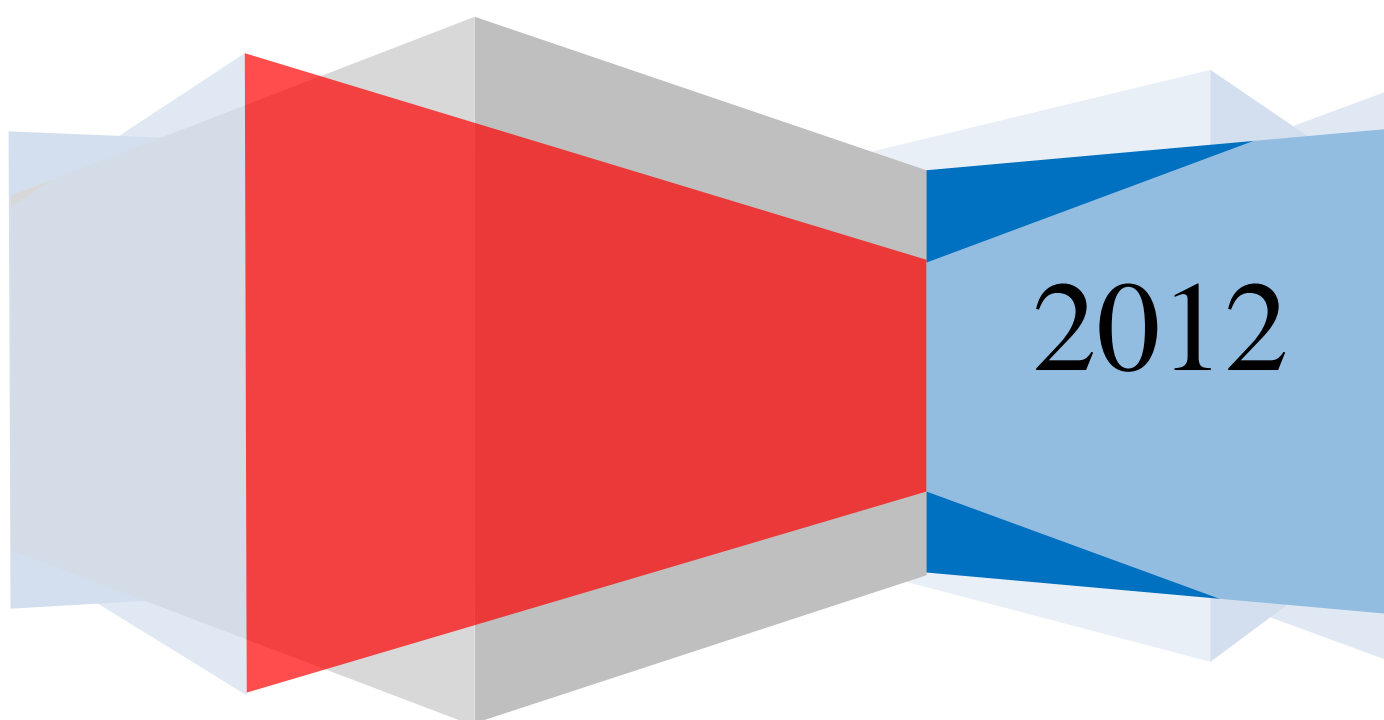
Lower Silesian voivodship

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Introduction

This report has been prepared thanks to the application of results of scientific research conducted since 2002 by the Institute of Enterprise, Collegium of Business Administration of the Warsaw School of Economics, under the supervision of Prof. H. Godlewska-Majkowska, Ph.D. All Authors are core members of the team that develops the methodology of calculating regional investment attractiveness in order that important characteristics of regions are captured as closely as possible both in general terms and from a point of view of specificity of a given kind of business activity as well as a size of investment.

Potential investment attractiveness (PAI) indices measure the location-specific advantages of regions. In their simplified version they are calculated for territorial units of various levels of statistical division of the country (gminas/communes, poviats/counties, subregions, voivodships/regions). These are PAI1 indices, which refer to the whole regional/national economy (PAI1_GN) and selected sections: C – manufacturing industry, G – trade and repair, I – tourism and catering, M – professional, scientific and technical services.

Besides, some indices are only calculated for voidoships on the basis of much more characteristics available on the regional or macroregional level. This allows us to evaluate their investment attractiveness in a much broader context. These are PAI2 indices, which are calculated both from a general point of view and with reference to the above mentioned sections of the economy (PAI2_C, PAI2_G, PAI2_I, PAI2_M).

What is more, real investment attractiveness ranks are used in this report, which relates to the inflow of capital (in the form of investments) and the effects of investments considered from a point of view of productivity and returns on the outlays previously made.

The measurements in use are subject to annual review thanks to consulting them with foreign investor assistance institutions and direct contact to territorial self-government units as well as organisations of entrepreneurs. A description of methodological approach to measuring investment attractiveness of Polish regions, counties and communes can be found online on the Web site of the Institute of Enterprise : www.sgh.waw.pl/instytut/ip, on the Web site of the Centre for Regional and Local Analyses, which cooperates with the Institute of Enterprise: www.caril.edu.pl, as well as in numerous scientific publications and expert opinions.

1. The profile of regional economy of Lower Silesian (*dolnośląskie*) voivodship

Lower Silesian (*dolnośląskie*) voivodship belongs to the most attractive regions of Poland from investors' point of view. Its advantages are:

- a very high level of economic development, significantly exceeding the national average,
- a highly beneficial geopolitical location by virtue of the proximity of Germany and the Czech Republic as well as an attractive location in view of sales markets of agglomerations of Prague, Berlin and Warsaw,
- very well-developed transport infrastructure (road, railways, waterways, airways) and communications infrastructure:
 - convenient road connections: A4 highway, international roads: E40, E36, E65 and E67,
 - an expanded system of railways: international railways E30 and E59,
 - a well-developed network of water transport (the Oder system enables to ship by barges from Lower Silesia to the port complex of Szczecin-Świnoujście and through the Oder-Spree and Oder-Havel channels Lower Silesia is connected to the system of inland waterways of Western Europe),
 - Copernicus Airport Wrocław in Wrocław-Strachowice offers international air connections with Frankfurt upon Main, Munich, London, Copenhagen, Milan, Dublin, Nottingham, Dortmund, Shannon, Glasgow, Liverpool, Stockholm, Cork and Rome,
 - a very good access to the Internet (in this respect the voivodship belongs to the highest rated regions in Poland),
- the presence of many higher education institutions among which there are many renowned Polish scientific establishments¹,
- rich cultural heritage (numerous monuments among which the following ones should be noted: The Centennial Hall, The People's Hall and the Churches of Peace in Świdnica and Jawor – UNESCO World Heritage Sites) and natural conditions (The Sudetes, Sudetian Foreland) set foundations for the development of tourist services,
- a high level of the development of industry which is reflected in the region's specialisation in the modern kinds of industrial production (the manufacture of: means of transport, pharmaceuticals, consumer electronics, household appliances/ white and brown goods),
- highly developed agriculture, in particular plant production which is a foundation of the development of food processing,
- numerous locations of special economic zones offering favourable conditions of conducting a business to investors

¹ In 2010 the Ministry of Science and Higher Education ranked among the best scientific establishments in Poland the following ones: Wrocław University of Technology (Faculty of Chemistry, Faculty of Mechanical Engineering, Faculty of Architecture, Faculty of Microsystem Electronics and Photonics), University of Wrocław (Faculty of Chemistry, Faculty of Biotechnology, Faculty of Mathematics and Computer Science, Faculty of Philology), Wrocław University of Economics (Faculty of Engineering and Economics, Faculty of Management, Computer Science and Finance, Faculty of Economics, Management and Tourism, the latter located in Jelenia Góra), Wrocław University of Environmental and Life Sciences (Faculty of Food Science, Faculty of Veterinary Medicine, Faculty of Biology and Animal Science) and Ludwik Hirsztfeld Institute of Immunology and Experimental Therapy in Wrocław.

Chart 1. General characteristics of the economy of Lower Silesian voivodship

Feature	Lower Silesian voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) 2009	38,395	35,210	-
Population (persons) on 31 December 2011	2,916,577	38,538,447	7.6
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	42,767	492,646	8.7
Secondary schools graduates (persons) in 2011	26,591	421,724	6.3
Number of employed persons on 31 December 2011	1,011,328	13,911,203	7.3
Structure of employed persons in 2011.	agriculture 6.3% industry 34.5% services 59.2%	agriculture 12.7% industry 30.6% services 56.7%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN mln) in 2010	5,280.7	61,600.3	8.6
Capital of companies (PLN mln) in 2010	15,901.1	188,812.4	8.4
Special economic zones (SEZs) in the voivodship			
<ul style="list-style-type: none"> - The Kamienna Góra SEZ, subzones: gmina Dobroszyce, gmina Gryfów Śląski, gmina Janowice Wielkie, gmina Kamienna Góra, gmina Lubawka, gmina Nowogrodziec, gmina Prusice, gmina Żmigród, city Jawor, city Jelenia Góra, city Kamienna Góra, city Lubań, city Piechowice, city Zgorzelec - The Legnica SEZ, subzones gmina Chojnów, gmina Gromadka, gmina Legnickie Pole, gmina Miękinia, gmina Polkowice, gmina Prochowice, gmina Przemków, gmina Środa Śląska, city Chojnów, city Głogów, city Legnica, city Lubin, city Złotoryja - The Tarnobrzeg SEZ, subzones: gmina Kobierzyce - The Wałbrzych SEZ, subzones: gmina Brzeg Dolny, gmina Bystrzyca Kłodzka, gmina Długołęka, gmina Góra, gmina Jelcz-Laskowice, gmina Kłodzko, gmina Kobierzyce, gmina Nowa Ruda, gmina Oława, gmina Strzegom, gmina Strzelin, gmina Syców, gmina Świdnica, gmina Twardogóra, gmina Wiązów, gmina Wołów, gmina Ząbkowice Śląskie, gmina Żarów, city Bielawa, city Bolesławiec, city Dzierżoniów, city Kłodzko, city Kudowa-Zdrój, city Nowa Ruda, city Oleśnica, city Oława, city Świdnica, city Świebodzice, city Wałbrzych, city Wrocław, city Piława Górna 			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)	National economy class A Capital-intensive industry class A Labour-intensive industry class B Trade class B Tourism class A Education class A		
Real investment attractiveness (economic effects evaluation)	National economy class A Industry class A Trade class C Tourism class B		

Science and technical professional activity class A		
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy		
Poviats	Class A	Wrocław (City), Polkowicki, Legnica (City), Lubiński, Jelenia Góra (City), Wrocławski
	Class B	Głogowski, Zgorzelecki, Wołowski
Gminas**	Class A	Polkowice (3), Wrocław (1), Bolesławiec (1), Lubin (1), Karpacz (1), Chojnów (1), Świdnica (1), Głogów (1), Zgorzelec (1), Siechnice (3), Złotoryja (1), Brzeg Dolny (3), Oleśnica (1), Kobierzyce (2), Legnica (1), Lubań (1), Jawor (1), Jelenia Góra (1), Oława (1), Polanica-Zdrój (1), Kłodzko (1), Szczawno-Zdrój (1), Kamienna Góra (1), Dzierżoniów (1), Świebodzice (1), Lubin (2), Jerzmanowa (2), Kąty Wrocławskie (3), Wałbrzych (1), Kowary (1), Kudowa-Zdrój (1), Bogatynia (3), Bielawa (1), Rudna (2), Radków (3), Świeradów-Zdrój (1), Nowa Ruda (1), Szczytna (3), Boguszków-Gorce (1), Strzegom (3), Zawidów (1), Grębocice (2), Piława Górna (1), Stronie Śląskie (3), Warta Bolesławiecka (2), Strzelin (3), Piechowice (1), Oborniki Śląskie (3), Syców (3), Prochowice (3), Duszniki-Zdrój (1), Długołęka (2)
	Class B	Czernica (2), Szklarska Poręba (1), Jelcz-Laskowice (3), Łądek-Zdrój (3), Góra (3), Wołów (3), Legnickie Pole (2), Wisznia Mała (2), Bolesławiec (2), Kunice (2), Środa Śląska (3), Chocianów (3), Przemków (3), Krośnice (2), Trzebnica (3), Mieroszów (3), Sobótka (3), Pieńsk (3), Ząbkowice Śląskie (3), Jedlina-Zdrój (1), Siekierczyn (2), Czarny Bór (2), Lubawka (3)

In 2009 Lower Silesian voivodship made a contribution of 8.2 % to the GDP of Poland. Calculated per capita, it amounted to PLN 38,395 with the average for Poland PLN 35,210. With this result the voivodship occupies the second place in the country. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (59.2%) whereas a share of the agricultural and industrial sectors is respectively 6.3% and 34.5% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 2,916,577 (as of 2011), which is 7.6% of the population of Poland. The age structure of inhabitants of the voivodship in 2011 was as follows: 14 % of the population at pre-reproductive age, 69% at reproductive age, 17% post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%).

The registered unemployment rate in the voivodship amounted to 12.4% in August 2012, compared to 12.4 % in Poland². The average monthly gross remuneration in enterprises sector amounted in the first six months of 2012 to 3,819.8 PLN, which is 103,6% of average remuneration in Poland.

The main potential for human capital creation in the voivodship lies in 38 higher education institutions in which 160.2 thousand students study, which makes up 9.2% of students Poland-wide. Moreover 6.7 % of pupils of secondary schools attend technical schools and 7.2% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: copper ore and brown coal mining and processing, the extraction of rock mineral resources, the manufacture of textiles, the manufacture of food and beverages, the manufacture of wooden products, chemical industry, the manufacture of machinery and electrical apparatus, the manufacture of glassware and ceramics, the manufacture of subassemblies and automobile parts.

² The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 4 special economic zones (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

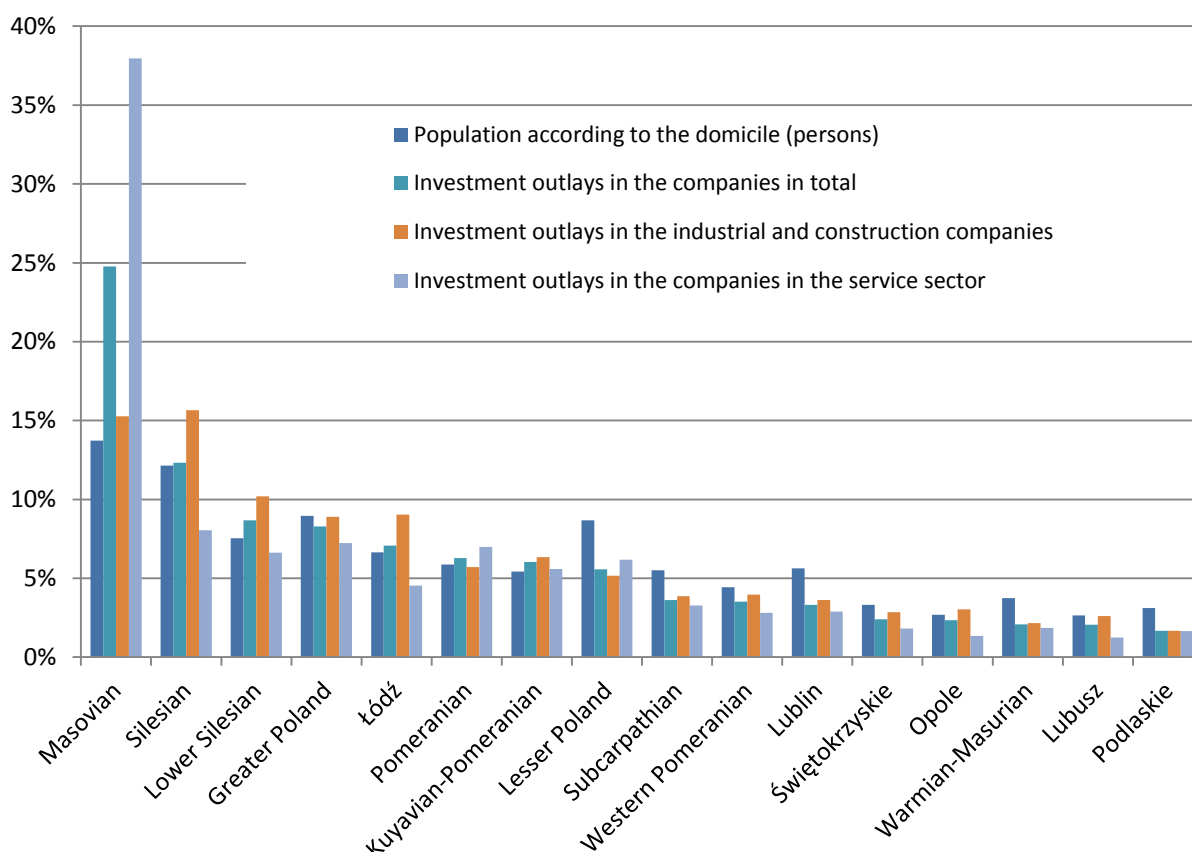
- SSE Kamiennogórska (Kamienna Góra special economic zone), subzones: Dobroszyce, Gryfów Śląski, Janowice Wielkie, Kamienna Góra, Lubawka, Nowogrodzic, Prusice, Żmigród, the city of Jawor, the city of Jelenia Góra, the city of Kamienna Góra, the city of Lubą, the city of Piechowice, the city of Zgorzelec,
- SSE Legnicka (Legnica special economic zone), subzones: Chojnów, Gromadka, Legnickie Pole, Miękinia, Polkowice, Prochowice, Przemków, Środa Śląska, the city of Chojnów, the city of Głogów, the city of Legnica, the city of Lubin, the city of Złotoryja,
- SSE Tarnobrzaska (Tarnobrzeg special economic zone) subzone: Kobierzyce,
- SSE Wałbrzyska (Wałbrzych special economic zone), subzones: Brzeg Dolny, Bystrzyca Kłodzka, Długołęka, Góra, Jelcz-Laskowice, Kłodzko, Kobierzyce, Nowa Ruda, Oława, Strzegom, Strzelin, Syców, Świdnica, Twardogóra, Wiązów, Wołów, Ząbkowice Śląskie, Żarów, the city of Bielawa, the city of Bolesławiec, the city of Dzierżoniów, the city of Kłodzko, the city of Kudowa-Zdrój, the city of Nowa Ruda, the city of Oleśnica, the city of Oława, the city of Świdnica, the city of Świebodzice, the city of Wałbrzych, the city of Wrocław, the city of Piława Górna.

2. Region's rank in terms of investment attractiveness in Poland

Lower Silesian voivodship is characterised by a very high level of universal investment attractiveness, which manifests itself in its rank (Class A) according to the main potential investment attractiveness index for the whole national economy PAI 2_GN (see Exhibit 1 in the Appendix). The region also ranked very high in terms of potential investment attractiveness calculated for the PAI2 indices for the sections: capital-intensive industry (Class A), labour-intensive industry (Class B), trade (Class B), tourism (Class A), professional, scientific and technical activities (Class A).³

Investment attractiveness can also be determined on the basis of indices of real investment attractiveness (RAI), based on such microclimates as: returns on tangible assets, labour productivity, self-financing of self-government territorial units and investment outlays. The region ranked above the average in terms of RAI indices for the national economy (Class A), industry (Class B), trade and repairs (Class C), tourism and catering (Class A) and professional, scientific and technical activities (Class A) - see Exhibit 2 in the Appendix. Potential and real investment attractiveness is reflected in the decisions of investors on business location. This is shown in Exhibit 1.

Exhibit 1. Regional structure of investment outlays in the companies in 2010 in comparison with the share in the population (percentage of country's population)



Note: these are the most up-to-date data.

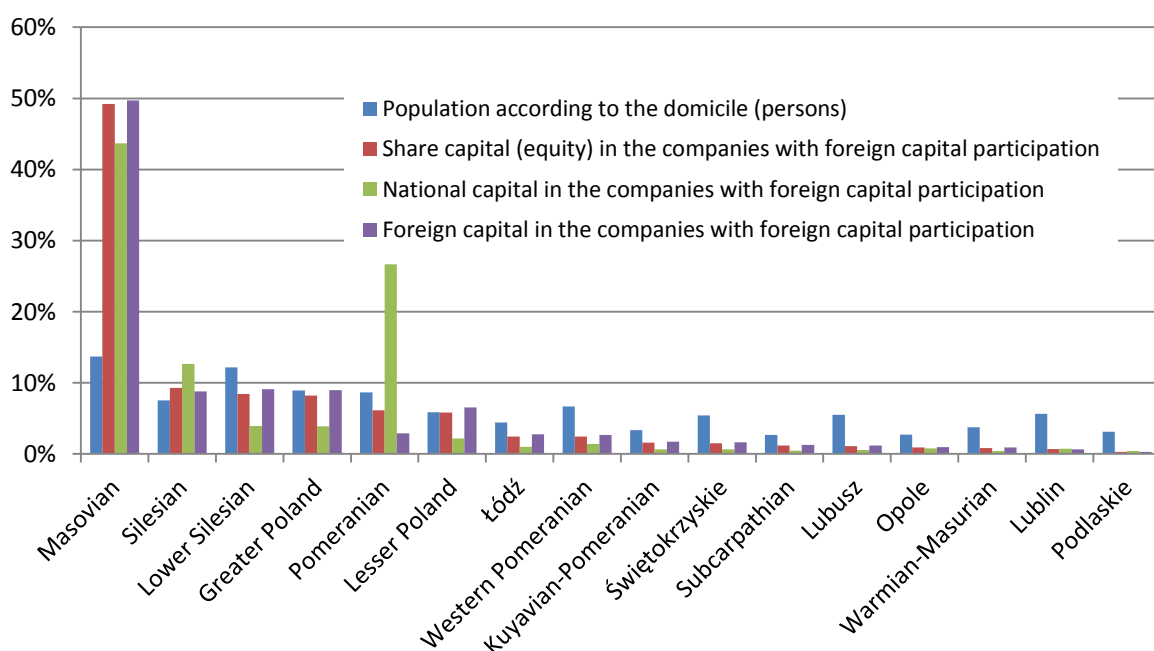
Source: Authors on the basis of the Local Data Bank (downloaded 23.10.2012)

³ Section C –manufacturing industry, section G – trade and repair, section I – hotels and restaurants, section M- professional, scientific and technical activities.

According to this exhibit Lower Silesian voivodship is competitive when it comes to investments as its share in the national investment outlays is higher than its share in the country's population could suggest. This concerns investment outlays in industrial companies (market share of 10%) and is different in terms of investment outlays in the service sector. The lowest competitive rank is reached in the financial sector and real estate services (5%). The region is above the average in terms of setting up companies with foreign capital participation. 9% of all newly created firms in Poland were located in Lower Silesian voivodship.

An analysis of the size of accumulated capital in the companies with foreign capital participation leads to the same conclusion – see Exhibit 2.

Exhibit 2. Regional structure of capital in the companies with foreign capital participation in comparison with a share in population (% national population)



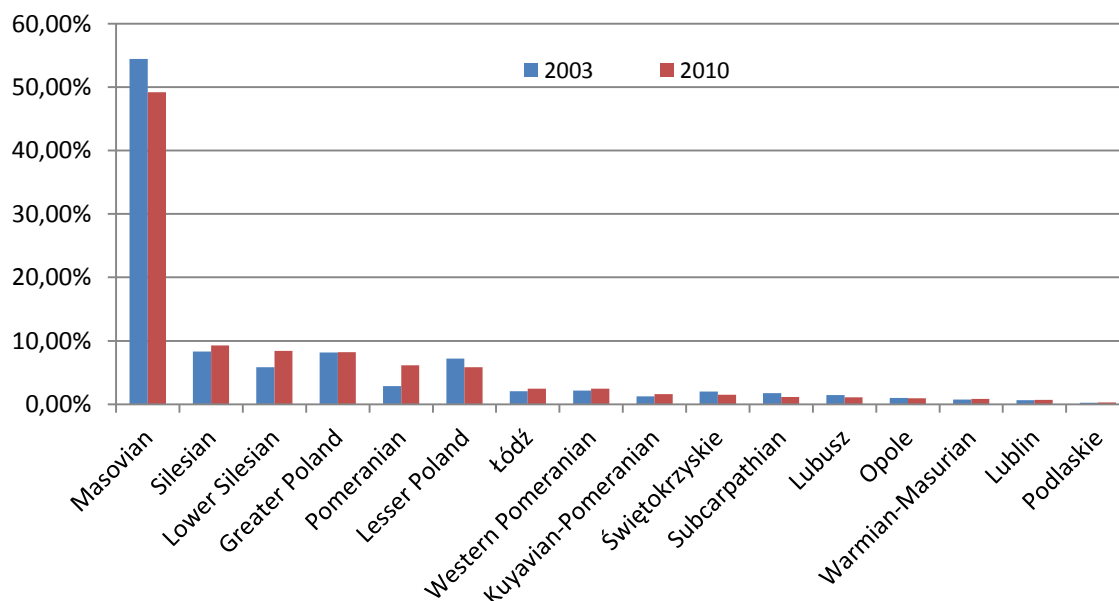
Note: these are the most up-to-date data.

Source: Authors on the basis of the Local Data Bank (downloaded 23.10.2012)

In 2009 Lower Silesian region took the third place in Poland in terms of accumulated share capital in the companies with foreign capital participation (a share of 8% in its value in all voivodships). However, this result is much lower than the leading Masovian region, which attracted a half of share capital of companies with foreign capital participation whereas Lower Silesia only 8%.

Lower Silesia is also characterised by a high increase in its competitiveness in terms of foreign direct investments, which is reflected in the fact that a number of employees of the companies with foreign capital participation increase in the years 2003-2010 by 60% and a market share measured with the value of foreign capital in the above mentioned companies rose from 6% to 8% (see Exhibit 3). Competitive rank measured as a region's share in a number of employees of entities with foreign capital participation increased from 8.17% to 9.16%. This shows the voivodship is making use of its competitive advantages, not only related to the factor of labour.

Exhibit 3. Regional competitive rank in terms of investments with foreign capital participation according to the value of share capital of the companies with foreign capital participation in 2003 and 2010 (percentage of national representation)



Source: Authors on the basis of the Local Data Bank (downloaded 23.10.2012)

3. Internal diversification of regional investment attractiveness

Poviats (counties)

The following poviats are considered most attractive in Lower Silesian voivodship: the city of Jelenia Góra, lubiński, polkowicki, the city of Legnica, wrocławski, the city of Wrocław, jeleniogórski, zgorzelecki, glogowski, wołowski - see Chart 2.

Chart 2. Potential investment attractiveness of poviats of Lower Silesian voivodship for the national economy and selected sections

Powiat	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
The city of Wrocław	0,396	A	A	A	A	A
polkowicki	0,372	A	A	A	A	A
The city of Legnica	0,340	A	A	A	A	A
lubiński	0,334	A	A	A	B	A
The city of Jelenia Góra	0,330	A	A	B	B	A
wrocławski	0,319	A	A	A	A	B
glogowski	0,303	B	B	B	C	B
zgorzelecki	0,289	B	B	B	A	C
wołowski	0,288	B	C	C	D	C
jeleniogórski	0,285	C	C	B	A	C
świdnicki	0,285	C	B	B	B	C
wałbrzyski	0,279	C	B	C	C	C
bolesławiecki	0,279	C	C	B	A	D

oławski	0,278	C	C	C	B	C
dzierżoniowski	0,270	C	C	C	D	C
lubański	0,270	C	C	C	A	D
oleśnicki	0,267	C	C	C	B	D
kłodzki	0,267	C	C	D	B	D

Source: Authors' own materials.

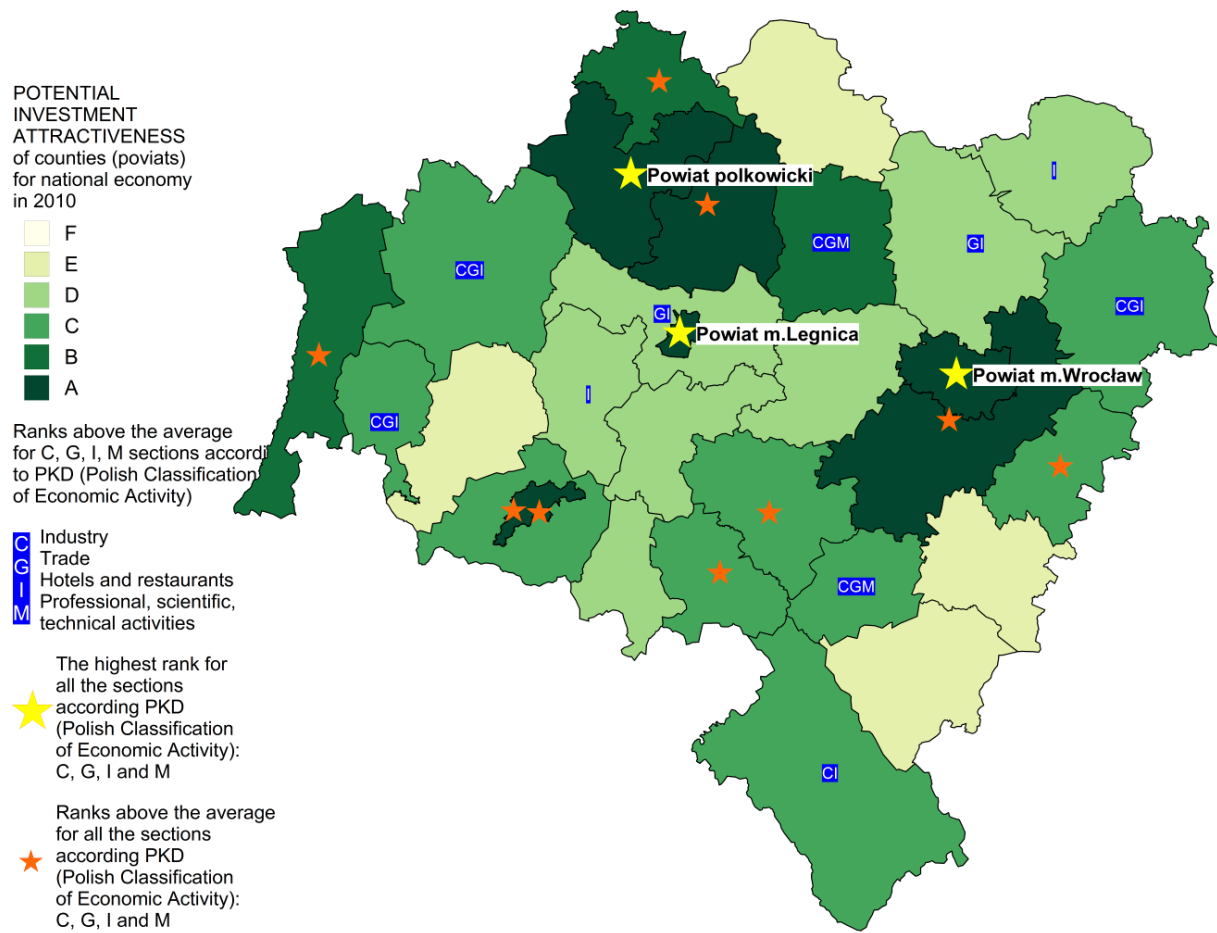
The following poviats should be distinguished: the cities of Wrocław and Legnica as well as polkowicki powiat as these units attained Class A in their potential investment attractiveness for all sections of the national economy under scrutiny in this research.

In reference to the sections mentioned below the following poviats should be additionally distinguished:

- Wołowski, jeleniogórski, bolesławiecki, oławski, dzierżoniowski, lubański, oleśnicki, kłodzki (Class C) for section C,
- Głogowski, wałbrzyski, trzebnicki, legnicki, milicki (Class C) for section I,
- Wołowski, wałbrzyski, oławski, dzierżoniowski, lubański, oleśnicki, trzebnicki, legnicki (Class C) for section G,
- Zgorzelecki, wołowski, jeleniogórski, świdnicki, wałbrzyski, oławski, dzierżoniowski (Class C) for section M.

Synthetic evaluation of potential investment attractiveness of poviats of Lower Silesian voivodship is presented in Exhibit 4.

Exhibit 4. Spatial diversification of potential investment attractiveness of poviats of Lower Silesian voivodship with consideration of the most attractive sections



Source: Authors' own materials.

Gminas (communes)

Like poviats, gminas are also very much diversified in terms of investment attractiveness. The highest ranked gminas are: Polkowice (3), Wrocław (1), Bolesławiec (1), Lubin (1), Karpacz (1), Chojnów (1), Świdnica (1), Głogów (1), Zgorzelec (1), Siechnice (3), Złotoryja (1), Brzeg Dolny (3), Oleśnica (1), Kobierzyce (2), Legnica (1), Lubań (1), Jawor (1), Jelenia Góra (1), Oława (1), Polanica-Zdrój (1), Kłodzko (1), Szczawno-Zdrój (1), Kamienna Góra (1), Dzierżoniów (1), Świebodzice (1), Lubin (2), Jerzmanowa (2), Kąty Wrocławskie (3), Wałbrzych (1), Kowary (1), Kudowa-Zdrój (1), Bogatynia (3), Bielawa (1), Rudna (2), Radków (3), Świeradów-Zdrój (1), Nowa Ruda (1), Szczytna (3), Boguszków-Gorce (1), Strzegom (3), Zawidów (1), Grębocice (2), Piława Górna (1), Stronie Śląskie (3), Warta Bolesławiecka (2), Strzelin (3), Piechowice (1), Oborniki Śląskie (3), Syców (3), Prochowice (3), Duszniki-Zdrój (1), Długołęka (2). It is also reflected in their high ranks (Class A or B) for all analysed sections – see Chart 3.

Chart 3. Potential investment attractiveness of gminas of Lower Silesian voivodship for the national economy and selected sections

Gmina	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
Polkowice (3)	0,303	A	A	A	A	A
Wrocław (1)	0,294	A	A	A	A	A
Bolesławiec (1)	0,288	A	A	A	A	A
Lubin (1)	0,288	A	A	A	A	A
Karpacz (1)	0,284	A	A	A	A	A
Chojnów (1)	0,282	A	A	A	C	A
Świdnica (1)	0,278	A	A	A	B	A
Głogów (1)	0,275	A	A	A	B	A
Zgorzelec (1)	0,274	A	A	A	A	A
Siechnice (3)	0,274	A	A	A	A	A
Złotoryja (1)	0,271	A	A	A	A	A
Brzeg Dolny (3)	0,269	A	A	A	A	A
Oleśnica (1)	0,267	A	A	A	A	A
Kobierzyce (2)	0,266	A	A	A	A	A
Legnica (1)	0,265	A	A	A	A	A
Lubań (1)	0,264	A	A	A	A	A
Jawor (1)	0,263	A	A	A	B	A
Jelenia Góra (1)	0,261	A	A	A	A	A
Oława (1)	0,256	A	A	A	A	A
Polanica-Zdrój (1)	0,253	A	A	A	A	A
Kłodzko (1)	0,252	A	A	A	B	A
Szczawno-Zdrój (1)	0,252	A	A	A	A	A
Kamienna Góra (1)	0,249	A	A	A	B	A
Dzierżoniów (1)	0,249	A	A	A	A	A
Świebodzice (1)	0,245	A	A	A	B	A
Lubin (2)	0,243	A	A	A	A	A
Jerzmanowa (2)	0,242	A	A	A	A	A
Kąty Wrocławskie (3)	0,241	A	A	A	A	A
Wałbrzych (1)	0,241	A	A	A	B	A
Kowary (1)	0,240	A	A	A	B	A

Kudowa-Zdrój (1)	0,240	A	A	A	A	B
Bogatynia (3)	0,239	A	A	A	A	B
Bielawa (1)	0,239	A	A	A	B	A
Rudna (2)	0,239	A	A	A	C	A
Radków (3)	0,238	A	A	A	A	B
Świeradów-Zdrój (1)	0,238	A	A	A	A	B
Nowa Ruda (1)	0,237	A	A	B	C	A
Szczytna (3)	0,235	A	A	B	A	B
Boguszów-Gorce (1)	0,235	A	A	A	B	B
Strzegom (3)	0,234	A	A	A	A	B
Zawidów (1)	0,233	A	A	A	C	B
Grębocice (2)	0,232	A	A	A	B	B
Piława Górna (1)	0,232	A	A	A	D	B
Stronie Śląskie (3)	0,229	A	A	C	B	A
Warta Bolesławiecka (2)	0,228	A	A	A	B	B
Strzelin (3)	0,228	A	A	A	A	B
Piechowice (1)	0,227	A	A	A	A	A
Oborniki Śląskie (3)	0,226	A	A	A	A	A
Syców (3)	0,225	A	A	A	A	B
Prochowice (3)	0,225	A	A	A	B	B
Duszniki-Zdrój (1)	0,224	A	B	A	A	A
Długołęka (2)	0,224	A	A	A	A	B

(1) – urban commune, (2) – rural commune, (3) – rural-urban commune

Source: Authors' own material.

Attractive are also such gminas which belong to Class B according to the PAI1_GN index as: Czernica (2), Szklarska Poręba (1), Jelcz-Laskowice (3), Łądek-Zdrój (3), Góra (3), Wołów (3), Legnickie Pole (2), Wisznia Mała (2), Bolesławiec (2), Kunice (2), Środa Śląska (3), Chocianów (3), Przemków (3), Krośnice (2), Trzebnica (3), Mieroszów (3), Sobótka (3), Pieńsk (3), Ząbkowice Śląskie (3), Jedlina-Zdrój (1), Siekierczyn (2), Czarny Bór (2), Lubawka (3). The location-specific advantages are also universal in these gminas, which makes them attractiveness for all kinds of business activity in question.

This characteristic is not found in all gminas belonging to Class C. This condition is only fulfilled by the following gminas: Szczyrk (1), Buczkowice (2), Jasienica (2), Łodygowice (2), Węgierska Górka (2), Łazy (3), Ogrodzieniec (3) – see Chart 3 in the Appendix.

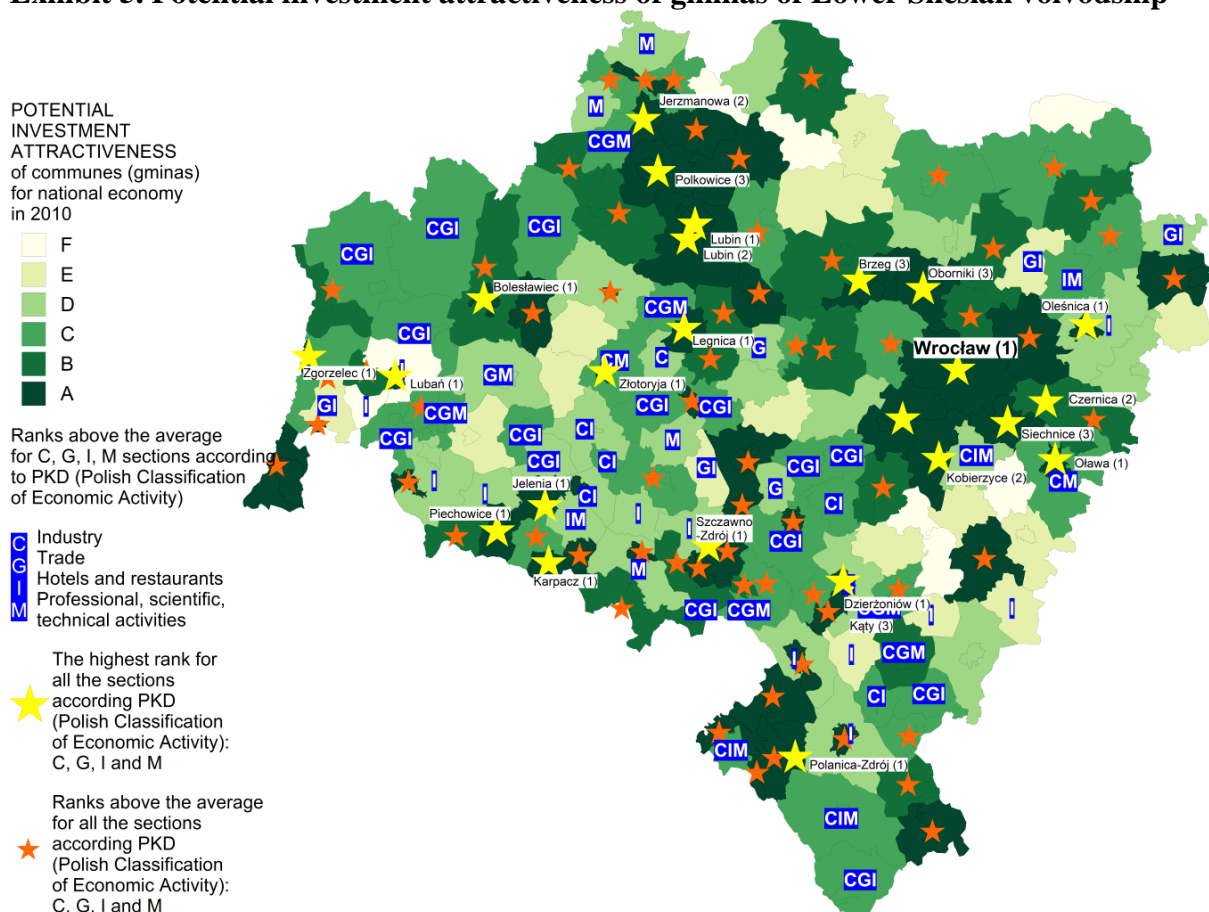
In reference to the sections mentioned below the following gminas of Class C should be distinguished:

- Gromadka (2), Nowogrodziec (3), Osiecznica (2), Bolków (3), Mściwojów (2), Janowice Wielkie (2), Jeźów Sudecki (2), Leśna (3), Olszyna (3), Gryfów Śląski (3), Wleń (3), Węgliniec (3), Zgorzelec (2), Wojcieszów (1), Świerzawa (3), Złotoryja (2), Głogów (2), Żukowice (2), Krotoszyce (2), Miłkowice (2), Ścinawa (3), Radwanice (2), Pieszyce (1), Dzierżoniów (2), Niemcza (3), Bystrzyca Kłodzka (3), Lewin Kłodzki (2), Międzyzlesie (3), Marcinowice (2), Głuszycza (3), Walim (2), Bardo (3), Milicz (3), Oława (2), Miękinia (2), Żmigród (3), Mietków (2), Żórawina (2) – for section C,
- Gromadka (2), Nowogrodziec (3), Bolków (3), Męcinka (2), Mściwojów (2), Podgórzyn (2), Lubawka (3), Leśna (3), Olszyna (3), Gryfów Śląski (3), Lwówek Śląski (3), Wleń (3), Sulików (2), Zgorzelec (2), Głogów (2), Żukowice (2), Miłkowice (2), Ruja (2), Ścinawa (3), Radwanice (2), Niemcza (3), Międzyzlesie (3), Stronie Śląskie (3), Dobromierz (2), Jaworzyna Śląska (3), Świdnica (2), Jedlina-Zdrój (1), Głuszycza (3),

- Walim (2), Milicz (3), Międzybórz (3), Twardogóra (3), Miękinia (2), Zawonia (2), Żmigród (3), - for section G,
- Nowogrodziec (3), Męcinka (2), Mściwojów (2), Janowice Wielkie (2), Lubawka (3), Marciszów (2), Lubań (2), Olszyna (3), Platerówka (2), Mirsk (3), Zawidów (1), Pieńsk (3), Wojcieszów (1), Świerzawa (3), Głogów (2), Żukowice (2), Chojnów (1), Rudna (2), Ścinawa (3), Chocianów (3), Przemków (3), Niemcza (3), Nowa Ruda (1), Bystrzyca Kłodzka (3), Kłodzko (2), Międzylesie (3), Nowa Ruda (2), Żarów (3), Jedlina-Zdrój (1), Stare Bogaczowice (2), Bardo (3), Ciepłowody (2), Stoszowice (2), Milicz (3), Dobroszyce (2), Oleśnica (2), Twardogóra (3), Przeworno (2), Malczyce (2), Miękinia (2), Trzebnica (3), Zawonia (2), Żmigród (3), Mietków (2), Żórawina (2), - dla sekcji I,
 - Bolesławiec (2), Bolków (3), Paszowice (2), Mysłakowice (2), Kamienna Góra (2), Olszyna (3), Siekierzyn (2), Lwówek Śląski (3), Pieńsk (3), Zgorzelec (2), Kotla (2), Żukowice (2), Legnickie Pole (2), Miłkowice (2), Ścinawa (3), Gaworzyce (2), Radwanice (2), Pieszyce (1), Niemcza (3), Bystrzyca Kłodzka (3), Lewin Kłodzki (2), Czarny Bór (2), Głuszyca (3), Walim (2), Złoty Stok (3), Krośnice (2), Dobroszyce (2), Twardogóra (3), Oława (2), Malczyce (2), Miękinia (2), Żmigród (3) – for section M.

Synthetic evaluation of potential investment attractiveness of gminas of Lower Silesian voivodship is presented in Exhibit 5.

Exhibit 5. Potential investment attractiveness of gminas of Lower Silesian voivodship



Source: Authors' own materials.

4. Voivodship's institutional support for investors and entrepreneurs

The development of business surrounding in a region is a vital component of its investment attractiveness. The institutions that support entrepreneurship, pro-investment solutions, research commercialization and innovativeness are of special importance. Among the voivodship's business-supporting institutions one should mention: Wrocławski Park Technologiczny S.A., Wrocławski Medyczny Park Naukowo – Technologiczny, Wrocławskie Centrum Transferu Technologii, Fundacja Rozwoju Demokracji Lokalnej Centrum Dolnośląskie in Wrocław, Dolnośląska Izba Gospodarcza in Wrocław, Zachodnia Izba Gospodarcza in Wrocław, Dolnośląska Izba Rzemieślnicza i Małej Przedsiębiorczości in Wrocław, Stowarzyszenie Rozwoju Przedsiębiorczości in Wrocław, Stowarzyszenie na Rzecz Promocji Dolnego Śląska in Wrocław, Związek Pracodawców Dolnego Śląska in Wrocław, Dolnośląska Izba Turystyki in Wrocław, Business Centre Club Łoża Dolnośląska (Lower Silesian Branch), Convention Bureau – Wrocław, Fundacja „Wałbrzych 2000”, Sudecka Izba Przemysłowo-Handlowa in Świdnica, Stowarzyszenie „Wolna Przedsiębiorczość” Centrum Wspierania Biznesu – Local Branch in Świdnica, Związek Pracodawców POLSKA MIEDŹ S.A., Bolesławieckie Towarzystwo Gospodarcze, Regionalny Związek Pracodawców in Bolesławiec, Wrocławska Agencja Rozwoju Regionalnego S.A., Agencja Rozwoju Regionalnego „AGROREG” S.A. w Nowej Rudzie, Karkonoska Agencja Rozwoju Regionalnego S.A. w Jeleniej Górze, Dolnośląska Agencja Współpracy Gospodarczej in Wrocław.

Wrocławski Park Technologiczny S.A. (Wrocław Technology Park Inc.) is targeted at hi-tech enterprises, laboratories and R&D centres. The Park offers office space renting, conference space and living rooms as well as laboratories and IT services. It also houses an alimentation-biotechnology-biomedical cluster, the Dolnośląski Academic Entrepreneurship Incubator and a kindergarten. (<http://www.technologpark.pl/>, 26.09.2012.).

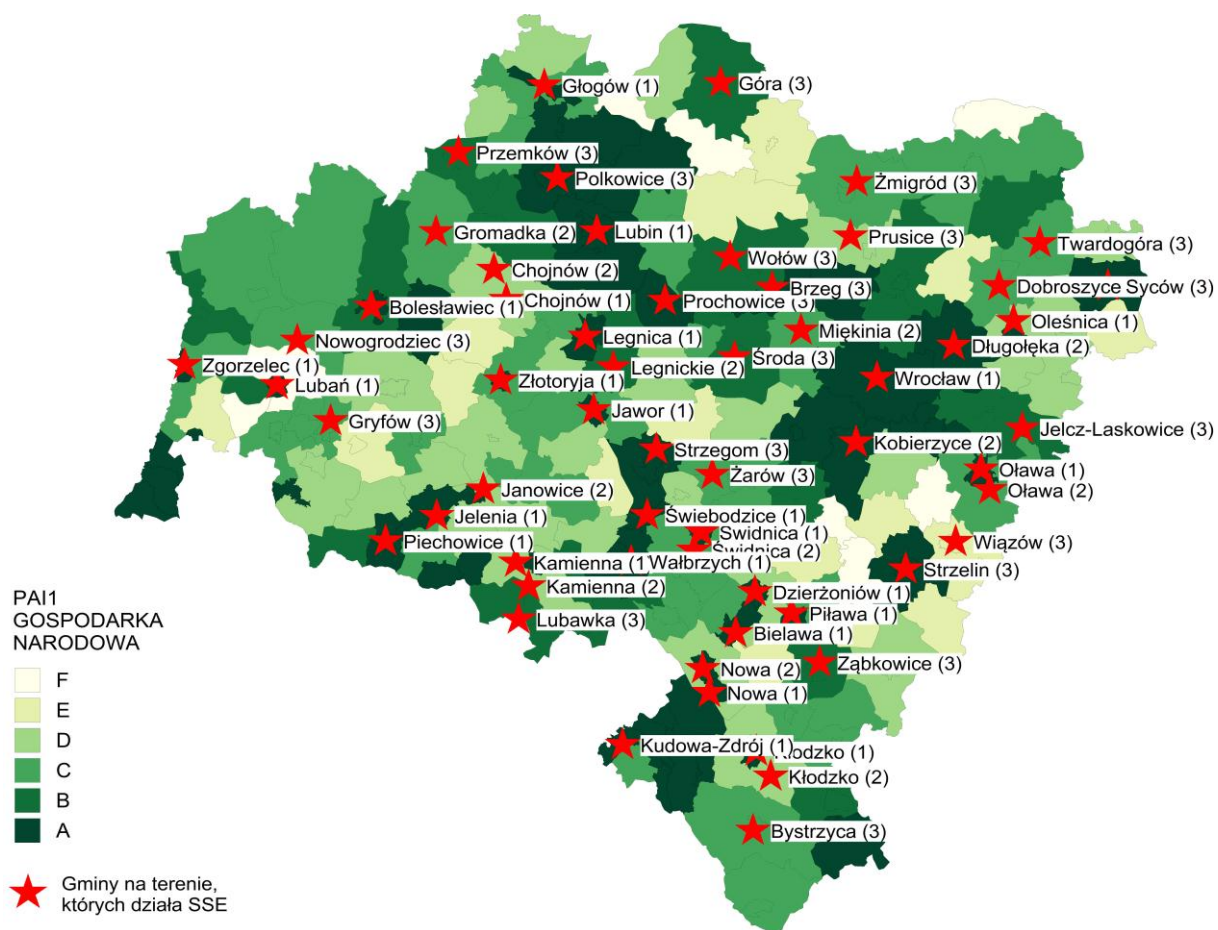
Wrocławskie Centrum Transferu Technologii (Wrocław Technology Transfer Centre) supports companies and scientists in acquiring, transferring and commercialisation of technologies, entrepreneurial innovativeness, international scientific cooperation and research programmes. As a member of EEN it also helps firms in the search for external trade and technology partners. The Centre runs the Regional Contact Spot for EU Research Programmes, which facilitates scientists' and entrepreneurs' access to research projects and funding. (www.wctt.pl/, 26.09.2012.).

Wrocławski Medyczny Park Naukowo – Technologiczny (Wrocław Medical Research – Technology Park) offers office space for firms operating in medical IT and technological branches as well as consulting services (The Centre for Business and Patent Consulting). The WM RTP oversees research in the fields of diagnostics, pharmaceuticals and other innovations, which are conceived in Wrocław universities and their commercialisation by acquiring business partners. The Park has initiated and coordinated the Pan-Polish e-HEALTH cluster (which promotes hi-tech ICT technologies in healthcare management and telemedical patient care support). The Park runs an Academic Innovation Incubator project, which helps establishing enterprises in IT and medical industries and a project of the Academic Entrepreneurship Incubator, which creates conditions for creation and functioning of companies run by graduates and research staff. The Park intends to create a Medical Centre for Data Processing dedicated to medical data and applications. (www.parkmedyczny.pl/, 26.09.2012.).

Special economic zones in Lower Silesian voivodship – effects

There are four special economic zones (SSE) in Lower Silesian voivodship: Kamiennogórska, Legnicka, Tarnobrzaska and Wałbrzyska. At the end of 2011 the areas of SSE were part of 24 cities and 34 gminas (counties). There are 2 zone in the area of Kobierzyce (Wałbrzyska and Tarnobrzaska). (Exhibit 6).

Exhibit 6. The location of SSE in Lower Silesian voivodship



Source: Authors' own calculations.

Chart 4. Effects of special economic zone functioning at the end of 2011

SSE/ Gmina	Leading industries (capital expenditure larger than 20% of overall capital expenditure in the subzone)	New jobs created	Cumulated capital expenditure in million PLN
Wałbrzyska SSE, Bielawa (1)	Data unavailable		
Wałbrzyska SSE, Bolesławiec (1)	Rubber and synthetic materials	393	169,1
Wałbrzyska SSE, Brzeg Dolny (3)	Chemical	64	329,0
Wałbrzyska SSE, Bystrzyca Kłodzka (3)	Data unavailable		
Legnicka SSE, Chojnów (1)	Services (laundry), metal	142	45,2
Legnicka SSE, Chojnów (2)		0	0,0
Wałbrzyska SSE, Długołęka (2)	Data unavailable		
Kamiennogórska SSE, Dobroszyce (2)		0	0,0
Wałbrzyska SSE, Dzierżoniów (1)	Rubber and synthetic materials	1.959	663,9
Legnicka SSE, Głogów (1)		0	0,0
Wałbrzyska SSE, Góra (3)	Metal products	2	0,8
Legnicka SSE, Gromadka (2)	Metal, chemical	302	181,0
Kamiennogórska SSE, Gryfów Śląski (3)		5	0,0
Kamiennogórska SSE, Janowice Wielkie (2)	Automotive, synthetic materials	735	76,4
Kamiennogórska SSE, Jawor (1)		0	0,0
Wałbrzyska SSE, Jelcz-Laskowice (3)	Automotive	2.390	1 396,3
Kamiennogórska SSE, Jelenia Góra (1)	Construction materials		0,8
Kamiennogórska SSE, Kamienna Góra (1)	Automotive	1.032	251,7
Kamiennogórska SSE, Kamienna Góra (2)	Data unavailable		
Wałbrzyska SSE, Kłodzko (1)	Electric machinery, technical	933	237,9
Wałbrzyska SSE, Kłodzko (2)	Data unavailable		
Wałbrzyska SSE, Kobierzyce (2)	Food processing	185	265,3
Tarnobrzaska SSE, Kobierzyce (2)	Elektronics, household appliances	10.861	3 523,5
Wałbrzyska SSE, Kudowa-Zdrój (1)	Metal products	111	13,5
Legnicka SSE, Legnica (1)	Metals, automotive	3.555	1 450,0
Legnicka SSE, Legnickie Pole (2)	Automotive	427	70,0
Kamiennogórska SSE, Lubań (1)	Machinery, metal products	240	20,1
Kamiennogórska SSE, Lubawka (3)	Textiles	246	11,6
Legnicka SSE, Lubin (1)		0	0,0
Legnicka SSE, Miękinia (2)	Data unavailable		
Wałbrzyska SSE, Nowa Ruda (1)	Data unavailable		
Wałbrzyska SSE, Nowa Ruda (2)	Chemical	343	94,4
Kamiennogórska SSE, Nowogrodziec (3)	Printing, automotive	1.814	1 063,2
Wałbrzyska SSE, Oleśnica (1)	Data unavailable		
Wałbrzyska SSE, Oława (1)	Paper	1.543	1 045,7
Wałbrzyska SSE, Oława (2)	Non-metalic mineral resources	34	90,0
Kamiennogórska SSE, Piechowice (1)	Ceramics	494	221,7
Wałbrzyska SSE, Piława Górna (1)	Data unavailable		
Legnicka SSE, Polkowice (3)	Automotive	3.810	2 800,0
Legnicka SSE, Prochowice (3)	Energy (pelets)	15	9,2
Kamiennogórska SSE, Prusice (3)		0	0,0

Legnicka SSE, Przemków (3)		0	0,0
Wałbrzyska SSE, Strzegom (3)	Data unavailable		
Wałbrzyska SSE, Strzelin (3)	Machinery	95	74,4
Wałbrzyska SSE, Syców (3)	Brak danych		
Legnicka SSE, Środa Śląska (3)	Automotive, chemical	622	330,0
Wałbrzyska SSE, Świdnica (1)	Chemical	2.050	891,7
Wałbrzyska SSE, Świdnica (2)	Data unavailable		
Wałbrzyska SSE, Świebodzice (1)	Cooling and ventilation machinery, machinery conservation	27	19,0
Wałbrzyska SSE, Twardogóra (3)	Data unavailable		
Wałbrzyska SSE, Wałbrzych (1)	Automotive	6.289	3 601,7
Wałbrzyska SSE, Wiązów (3)	Paper	2	2,3
Wałbrzyska SSE, Wołów (3)	Rubber and synthetic materials	48	16,4
Wałbrzyska SSE, Wrocław (1)	Rubber and synthetic materials	3.643	1 082,1
Wałbrzyska SSE, Ząbkowice Śląskie (3)	Wood materials	29	19,3
Kamiennogórska SSE, Zgorzelec (1)		0	0,0
Legnicka SSE, Złotoryja (1)	Construction materials, chemical	173	54,0
Wałbrzyska SSE, Żarów (3)	Machinery	1.874	757,2
Kamiennogórska SSE, Żmigród (3)	Wood products	6	8,9

Source: Authors' own calculations based on PAIIZ data.

The largest investments in voivodship's SSE have been completed in Wałbrzych, Wrocław, Polkowice, Legnica, Jelcz-Laskowice, Nowogrodziec and Oława and are mostly related to automotive industry. TOYOTA has invested over 3,1 billion PLN in Wałbrzych and Jelcz. Other localities have attracted firms producing parts and semi-products utilised in car construction.

The voivodship intends to acquire investors:

- From machine, metal, textile and synthetic materials industries, who would create jobs related to the existing labour resources as well as from wood, furniture and chemical industries and companies interested in innovation transfer into industry – in Kamiennogórska SSE;
- From automotive, electronic, synthetic materials, and domestic appliances industries to invest in innovating and research projects in municipal areas in Wałbrzyska SSE;
- From hi-tech industries, related to gathering and processing of data as well as from logistics, automotive, machinery, textile, construction and alimentation industries – in Legnicka SSE;

That are cooperating with entrepreneurs from Technological Park LG in the field of advanced technologies and services – in Tarnobrzaska SSE.

'A' Commune

Student Scientific Organisation for Entrepreneurship and Regional Analyses affiliated to the Institute of Enterprise of the Warsaw School of Economics, has again published the results of its research into the quality of investor assistance given by the communal authorities. The subject of this study of investment attractiveness is: an audit of Web sites and audit of e-contact in Polish and English with communal authorities. The effect of this study is a ranking 'A' Commune, which is thought to distinguish best performing self-government territorial units in terms of the use of means of electronic communication in their assistance. The research is carried out using the mystery client method. In this year's edition all gminas belonging to Class A according to the PAI 2010 index were subject to query.

As a result 70 gminas have been distinguished; this includes 5 gminas situated in Lower Silesian voivodship.

Chart 5. Gminas in Lower Silesian voivodship distinguished as ‘A’ Communes

Gmina	Powiat	Audit of Web sites	Audit of e-contact in Polish	Audit of e-contact in English	Sum
Świdnica (1)	świdnicki	9,5	4	0	13,5
Zgorzelec (1)	zgorzelecki	10	3	0	13
Legnica (1)	The city of Legnica	10	3	0	13
Bolesławiec (1)	bolesławiecki	9,5	0	3	12,5
Wałbrzych (1)	wałbrzyski	8,5	4	0	12,5

Source: Authors' own materials.

All distinguished gminas run their transparent and pleasant to read Web sites which include information and documents necessary for setting up a new company as well as information used by new investors when taking their decisions regarding business location. Furthermore, the advantages of the Web sites are their presence in social media and foreign language versions. Świdnica deserved particular attention as it proudly informs about the inflow of new investors on the Web site. What is more, the high place on the ranking is due to high quality of e-contact. All replies received included information about real estate tax exemptions and contact data. Bolesławiec only failed to submit an answer in Polish but in turn it was the only distinguished gmina to have sent a reply to an e-mail in English.

5. Region's strengths and weaknesses

Lower Silesian voivodship has its unique character and clear specificity which influences its strengths and weaknesses. If divided according to the main factors of location and location conditions classified into microclimates composing potential and real investment attractiveness, they can be grouped into strengths (microclimates ranking A, B or C) and weaknesses (microclimates ranking D, E or F) – see Chart 6.

Chart 6. Strengths and weaknesses of Lower Silesian voivodship

Strengths of the region according to the microclimates by IP SGH	Weaknesses of the region according to the microclimates by IP SGH
National economy	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class B Microclimate Social Infrastructure Class A Microclimate Market Class C Microclimate Administration/Governance Class A Microclimate Innovativeness Class C Labour productivity in enterprises Class B Profitability of enterprises Class A Self-financing of self-government units Class A Investment outlays Class A	Microclimate Social Capital Class D Returns on tangible assets Class E
Capital intensive industry	
Microclimate Human Resources Class A Microclimate Technical Infrastructure Class B Microclimate Social Infrastructure Class A Microclimate Market Class C Microclimate Administration/Governance Class A Microclimate Innovativeness Class C Returns on tangible assets Class B Labour productivity in enterprises Class A Self-financing of self-government units Class A Investment outlays Class C	Microclimate Social Capital Class D
Labour intensive industry	
Microclimate Human Resources Class A Microclimate Technical Infrastructure Class A Microclimate Social Infrastructure Class A Microclimate Market Class C Microclimate Administration/Governance Class A, Returns on tangible assets Class B Labour productivity in enterprises Class A Self-financing of self-government units Class A	Microclimate Social Capital Class E

Investment outlays Class C	
Trade	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class B Microclimate Social Infrastructure Class C Microclimate Market Class C Microclimate Administration/Governance Class A Self-financing of self-government units Class A Investment outlays Class C	Microclimate Social Capital Class D Returns on tangible assets Class F Labour productivity in enterprises Class D
Tourism	
Microclimate Human Resources Class C Microclimate Technical Infrastructure Class B Microclimate Social Infrastructure Class A Microclimate Market Class C Microclimate Administration/Governance Class A Labour productivity in enterprises Class C Self-financing of self-government units Class A Investment outlays Class B	Microclimate Social Capital Class D Returns on tangible assets Class D
Professional, scientific and technical activities	
Microclimate Human Resources Class A Microclimate Technical Infrastructure Class A Microclimate Social Infrastructure Class A Microclimate Market Class B Microclimate Administration/Governance Class A Microclimate Innovativeness Class C Returns on tangible assets Class A Labour productivity in enterprises Class B Self-financing of self-government units Class A Investment outlays Class A	Microclimate Social Capital Class D

Source: Authors on the basis of the results of research of the Institute of Enterprise of the Warsaw School of Economics (IP SGH).

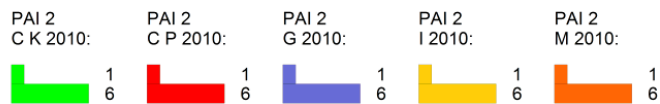
APPENDIX

Exhibit 1. Potential investment attractiveness of Polish voivodship broken down by basic sections of the national economy

Potential investment
attractiveness for national economy in 2010

- Class F
- Class E
- Class D
- Class C
- Class B
- Class A

Potential investment attractiveness
Sections C, G and M according to PKD
(Polish Classification of Economic Activity)



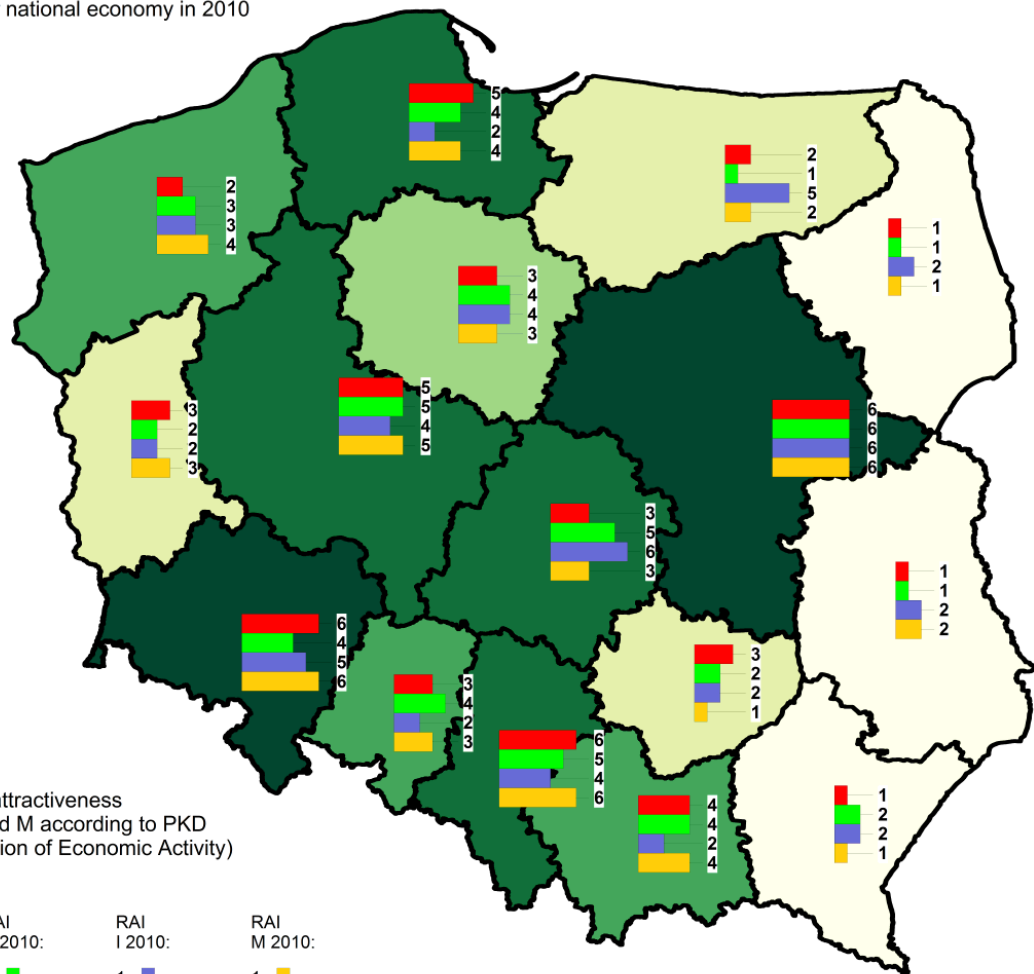
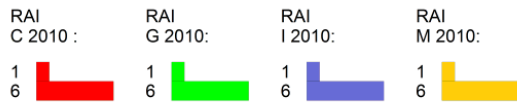
Source: Authors' own materials.

Exhibit 2. Real investment attractiveness of Polish voivodship broken down by basic sections of the national economy

Real investment attractiveness for national economy in 2010

- Class F
- Class E
- Class D
- Class C
- Class B
- Class A

Real investment attractiveness
Sections C, G and M according to PKD
(Polish Classification of Economic Activity)



Source: Authors' own materials.

Chart 1. List of investment attractiveness indices for voivodships

Voivodship	LOWER SILESIAN	KUYAVIAN-POMERANIAN	LUBLIN	LUBUSZ	ŁÓDŹ	LESSER POLAND	MASOVIAN	OPOLE	SUBCARPATHIAN	PODLASKIE	POMERANIAN	SILESIAN	ŚWIĘTOKRZYSKIE	WARMIAN-MASURIAN	GREATER POLAND	WESTERN POMERANIAN
PAI1 GN	A	E	F	C	D	C	A	E	D	E	B	A	F	D	B	C
PAI2 GN	A	E	F	D	C	B	A	D	D	E	C	A	F	E	C	D
RAI GN	A	D	F	E	B	C	A	C	F	F	B	B	E	E	B	C
PAI1 C	A	D	F	C	C	C	A	D	E	E	B	A	F	E	C	C
PAI2 C KAPITAŁ	A	E	F	D	D	B	A	D	D	E	B	A	F	F	C	E
PAI2 C PRACA	B	D	F	D	C	B	A	E	E	F	C	A	E	E	C	D
RAI C	A	D	F	D	D	C	A	D	F	F	B	A	D	E	B	E
PAI1 G	A	E	F	C	D	B	A	D	E	F	B	A	F	C	C	C
PAI2 G	B	C	F	E	C	B	A	D	E	E	C	A	F	E	B	D
RAI G	C	C	F	E	B	C	A	C	E	F	C	B	E	F	B	D
PAI1 I	B	E	F	B	E	B	A	E	D	E	B	D	F	B	C	A
PAI2 I	A	E	F	C	E	B	A	E	E	E	B	D	F	C	C	A
RAI I	B	C	E	E	A	E	A	E	E	E	E	C	E	B	C	D
PAI1 M	A	E	F	C	D	C	A	D	D	F	B	B	F	D	B	C
PAI2 M	A	E	E	D	D	C	A	D	D	E	C	B	F	E	C	D
RAI M	A	D	E	D	D	C	A	D	F	F	C	A	F	E	B	C

Source: Authors on the basis of the results of statutory research carried out in the Collegium of Business Administration under the guidance of H. Godlewska-Majkowska.

Chart 2. Potential investment attractiveness of poviats of Lower Silesian voivodship for the national economy and selected sections

Poviats (counties)	PAI1_GN	PAI1_GN_Classes	PAI1_C_Classes	PAI1_G_Classes	PAI1_I_Classes	PAI1_M_Classes
The city of Wrocław	0,396	A	A	A	A	A
polkowicki	0,372	A	A	A	A	A
The city of Legnica	0,340	A	A	A	A	A
lubiński	0,334	A	A	A	B	A
The city of Jelenia Góra	0,330	A	A	B	B	A
wrocławski	0,319	A	A	A	A	B
głogowski	0,303	B	B	B	C	B
zgorzelecki	0,289	B	B	B	A	C
wołowski	0,288	B	C	C	D	C
jeleniogórski	0,285	C	C	B	A	C
świdnicki	0,285	C	B	B	B	C
wałbrzyski	0,279	C	B	C	C	C
bolesławiecki	0,279	C	C	B	A	D
oławski	0,278	C	C	C	B	C
dzierżoniowski	0,270	C	C	C	D	C
lubański	0,270	C	C	C	A	D
oleśnicki	0,267	C	C	C	B	D
kłodzki	0,267	C	C	D	B	D

Source: See Chart 1.

Chart 3. Potential investment attractiveness of gminas of Lower Silesian voivodship for the national economy and selected sections

Gmina (commune)	PAI1_GN	PAI1_GN_classes	PAI1_C_classes	PAI1_G_classes	PAI1_I_classes	PAI1_M_classes
Polkowice (3)	0,303	A	A	A	A	A
Wrocław (1)	0,294	A	A	A	A	A
Bolesławiec (1)	0,288	A	A	A	A	A
Lubin (1)	0,288	A	A	A	A	A
Karpacz (1)	0,284	A	A	A	A	A
Chojnów (1)	0,282	A	A	A	C	A
Świdnica (1)	0,278	A	A	A	B	A
Głogów (1)	0,275	A	A	A	B	A
Zgorzelec (1)	0,274	A	A	A	A	A
Siechnice (3)	0,274	A	A	A	A	A
Złotoryja (1)	0,271	A	A	A	A	A
Brzeg Dolny (3)	0,269	A	A	A	A	A
Oleśnica (1)	0,267	A	A	A	A	A
Kobierzyce (2)	0,266	A	A	A	A	A
Legnica (1)	0,265	A	A	A	A	A
Lubań (1)	0,264	A	A	A	A	A
Jawor (1)	0,263	A	A	A	B	A
Jelenia Góra (1)	0,261	A	A	A	A	A
Oława (1)	0,256	A	A	A	A	A
Polanica-Zdrój (1)	0,253	A	A	A	A	A
Kłodzko (1)	0,252	A	A	A	B	A
Szczawno-Zdrój (1)	0,252	A	A	A	A	A
Kamienna Góra (1)	0,249	A	A	A	B	A
Dzierżoniów (1)	0,249	A	A	A	A	A
Świebodzice (1)	0,245	A	A	A	B	A
Lubin (2)	0,243	A	A	A	A	A
Jerzmanowa (2)	0,242	A	A	A	A	A
Kąty Wrocławskie (3)	0,241	A	A	A	A	A
Wałbrzych (1)	0,241	A	A	A	B	A
Kowary (1)	0,240	A	A	A	B	A
Kudowa-Zdrój (1)	0,240	A	A	A	A	B
Bogatynia (3)	0,239	A	A	A	A	B
Bielawa (1)	0,239	A	A	A	B	A
Rudna (2)	0,239	A	A	A	C	A
Radków (3)	0,238	A	A	A	A	B
Świeradów-Zdrój (1)	0,238	A	A	A	A	B
Nowa Ruda (1)	0,237	A	A	B	C	A
Szczytna (3)	0,235	A	A	B	A	B
Boguszów-Gorce (1)	0,235	A	A	A	B	B
Strzegom (3)	0,234	A	A	A	A	B
Zawidów (1)	0,233	A	A	A	C	B
Grębocice (2)	0,232	A	A	A	B	B
Piława Górna (1)	0,232	A	A	A	D	B

Stronie Śląskie (3)	0,229	A	A	C	B	A
Warta Bolesławiecka (2)	0,228	A	A	A	B	B
Strzelin (3)	0,228	A	A	A	A	B
Piechowice (1)	0,227	A	A	A	A	A
Oborniki Śląskie (3)	0,226	A	A	A	A	A
Syców (3)	0,225	A	A	A	A	B
Prochowice (3)	0,225	A	A	A	B	B
Duszniki-Zdrój (1)	0,224	A	B	A	A	A
Długołęka (2)	0,224	A	A	A	A	B
Czernica (2)	0,222	B	A	A	A	A
Szklarska Poręba (1)	0,221	B	B	A	A	B
Jelcz-Laskowice (3)	0,220	B	B	B	B	A
Lądek-Zdrój (3)	0,220	B	A	B	A	B
Góra (3)	0,219	B	B	A	B	B
Wołów (3)	0,218	B	B	A	B	B
Legnickie Pole (2)	0,218	B	A	A	A	C
Wisznia Mała (2)	0,217	B	B	A	A	B
Bolesławiec (2)	0,215	B	B	B	A	C
Kunice (2)	0,213	B	B	B	B	A
Środa Śląska (3)	0,211	B	B	B	B	B
Chocianów (3)	0,210	B	B	B	C	B
Przemków (3)	0,210	B	B	B	C	B
Krośnice (2)	0,210	B	B	B	A	C
Trzebnica (3)	0,210	B	B	B	C	B
Mieroszów (3)	0,209	B	B	B	A	D
Sobótka (3)	0,208	B	B	B	B	B
Pieńsk (3)	0,206	B	B	B	C	C
Ząbkowice Śląskie (3)	0,206	B	B	B	D	B
Jedlina-Zdrój (1)	0,205	B	B	C	C	B
Siekierczyn (2)	0,204	B	B	B	B	C
Czarny Bór (2)	0,203	B	B	B	B	C
Lubawka (3)	0,203	B	B	C	C	B

Source: See Chart 1.

Note: all indices in this report have been computed on the basis of the most up-to-date data from the Local Data Bank (2012).