

CENTRE FOR REGIONAL AND
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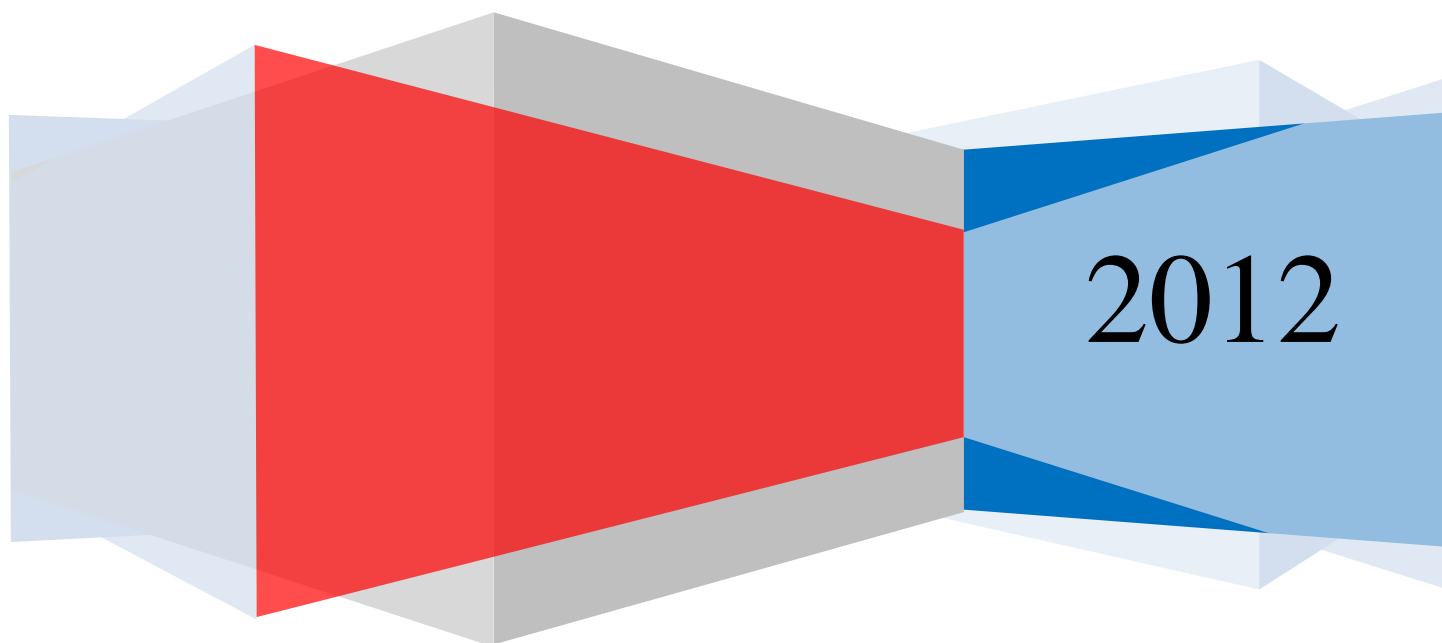
**REGIONAL
INVESTMENT
ATTRACTIVENESS
2012**

*Dr hab. Hanna Godlewska-Majkowska, Ph. D.
university professor at the Warsaw School of Economics*

Agnieszka Komor, Ph.D.

Patrycjusz Zarębski, Ph.D.

Magdalena Typa, M.A.



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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 voidships 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 Nowogrodzic, 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 Wązów, gmina Wołów, gmina Ząbkowice Śląskie, gmina Żarów, city Bielawa, city Bolesławiec, city Dzierżonów, 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), Dzierżonów (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), Długoleka (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, Nowogrodziec, Prusice, Żmigród, the city of Jawor, the city of Jelenia Góra, the city of Kamienna Góra, the city of Lubań, 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. The profile of regional economy of Kuyavian-Pomeranian (kujawsko-pomorskie) voivodship

Kuyavian-Pomeranian (*kujawsko-pomorskie*) voivodship is situated in the central part of the country. It is renowned for its very well-developed agriculture which has become a foundation of the development of investments in the food industry. Moreover, for industrial traditions and the adjustment of the education system of the region to its needs the region is an attractive site for industrial investments.

The advantages of the voivodship are:

- its central location in Poland, where important traffic routes intersect, including lines belonging to the trans-European transport network TEN-T, which facilitates the access to Polish markets and suppliers, both from Poland and from abroad,
- a good access to social infrastructure including in particular medical units, sanatoria and health resorts,
- good research and development centres³,
- cultural richness (numerous monuments among which the Old Town complex of Toruń deserves a note as a UNESCO World Heritage site) and natural conditions (the Kuyavian Lake District and its brines) set the foundations for the development of tourist and health services,
- highly developed agriculture, both animal and plant production, both being the foundations of the development of food industry,
- industrial traditions especially in chemical industry, the manufacture means of transport and electronics, which is a factor facilitating the search for contractors as well as higher and vocational education institutions graduates specialising in the fields necessary for the investors in the industry,
- favourable conditions for the development of renewable energy industry,
- the presence of centres supporting the transfer of innovative solutions from the research sector to the industry, e.g. The Centre of Technology Transfer in Toruń.

³ In 2010 the Ministry of Science and Higher Education ranked among the best scientific establishments in Poland the following ones: the Faculty of Chemistry and the Faculty of Philology of the Copernicus University of Toruń and the Faculty of Mechanical Engineering of the Jan and Jędrzej Śniadeckis University of Technologies and Life Sciences in Bydgoszcz.

Chart 1 . General characteristics of the economy of Kuyavian-Pomeranian voivodship

Feature	Kuyavian-Pomeranian voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	29,834	35,210	-
Population (persons)	2,098,370	38,538,447	5.4
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	231,47	492,646	4.7
Secondary schools graduates (persons) in 2011	233,94	421,724	5.5
Number of employed persons on 31 December 2011	683,549	13,911,203	4.9%
Structure of employed persons in 2011	agriculture 14.4% industry 31.5% services 54.1%	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	1,077.7	61,600.3	1.7
Capital of companies (PLN mln) in 2010	3,011.4	18,8812.4	1.6
Special economic zones (SEZs) in the voivodship			
- The Pomeranian SEZ, subzones: Barcin, Kowalewo Pomorskie, Łysomice, Świecie, the city of Bydgoszcz, the city of Grudziadz, the city of Rypin, the city of Toruń, Wąbrzeźno			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)	Trade class C		
Real investment attractiveness (economic effects evaluation)	Trade class C Tourism class C		
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	City: Bydgoszcz, Toruń, Grudziadz, Włocławek	
	Class B		
Gminas **	Class A	Toruń (1), Inowrocław (1), Grudziadz (1), Bydgoszcz (1), Chełmża (1), Włocławek (1), Wąbrzeźno (1), Ciechocinek (1), Osielsko (2), Golub-Dobrzyń (1), Brodnica (1), Chełmno (1), Janikowo (3), Rypin (1), Solec Kujawski (3), Świecie (3)	
	Class B	Barcin (3), Aleksandrów Kujawski (1), Wielka Nieszawka (2), Radziejów (1), Białe Błota (2), Tuchola (3), Kowal (1), Lipno (1)	

In 2009 Kuyavian-Pomeranian voivodship made a contribution of 4.6% to the GDP of Poland. Calculated per capita, it amounted to PLN 39,834 with the average for Poland PLN 35,210. With this result the voivodship occupies the tenth place in the country. The GDP growth rate in the period 2003-2009 amounted to 150.8% while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (54.1%) whereas a share of the agricultural and industrial sectors is respectively 14.4% and 31.5% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 2,098,370 (as of 2011), which makes up 5.4% of the population of Poland. The age structure of Kuyavian-Pomeranian voivodship in 2010 was as follows: 15.6% of the population at pre-reproductive age, 68.4% at reproductive age and 16.0% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 16.6%, compared to 12.4% in Poland⁴. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3,080.3, which is 83.6% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 21 higher education institutions in which 81.9 thousand students study, which makes up 4.7% of all students Poland-wide. Moreover 6.0 % of pupils of secondary schools attend technikum schools and 7.5% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: e-business, IT and telecommunications as well as the following branches: biotech industry, the manufacture of machinery and electronics, the manufacture of furniture, printing, the manufacture of food, the manufacture of chemical products, electrotechnical and electromechanical industry.

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

- Pomorska SSE (Pomerian special economic zone), subzones: Barcin, Kowalewo Pomorskie, Łysomice, Świecie, the city of Bydgoszcz, the city of Grudziadz, the city of Rypin, the city of Toruń, the city of Wabrzeżno.

⁴ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

3. The profile of regional economy of Lublin (lubelskie) voivodship

Lublin voivodship is situated in central-eastern Poland. It stands out in terms of exceptionally favourable for the development of food industry because of the agricultural character of prevailing part of the voivodship and very high specialisation in growing industrial plant, fruit and vegetables. The purity of natural environment, multiculturalism and tourist monuments (in particular The Old Town in Zamość, a UNESCO World Heritage site, the Polesie and Roztocze National Parks as well as 16 landscape parks) create good conditions for the development of tourism (including agritourism) and regional products manufacturing (including ecological food).

Moreover, the advantages of the voivodship are:

- its favourable location on an international traffic route, i.e. pan-European corridor East-West, which makes foreign market accessible, including the ones of the Ukraine and Belarus,
- relatively low labour costs (remunerations amounting to 87,9% of the national average) and at the same time access to well-qualified human resources in the cities of the region,
- a huge R&D potential thanks to an important role of academic establishments of Lublin in the Polish science and higher education. In 2010 the Ministry of Science and Higher Education ranked in the best scientific establishments in Poland the following ones: Fertilisers Research Institute in Puławy, National Veterinary Research Institute in Puławy, the Faculty of Humanities, the Faculty of Social Sciences and the Faculty of Law, Canon Law and Administration of the John Paul II Catholic University of Lublin, the Faculty of Law and Administration of the Maria Curie-Skłodowska University of Lublin, the Witold Chodźko Institute of Agricultural Institute in Law, the Pharmaceutical Faculty with Medical Analytics Division of the Medical University of Lublin as well as the Institute for Central-Eastern Europe in Lublin,
- industrial traditions, in particular in reference to transport, machine, chemical and food industries,
- predispositions to the development of BPO by virtue of access to well-qualified human resources and their low wage expectations.

Chart 1. General characteristics of the economy of Lublin voivodship

Feature	Lublin voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	23,651	35,210	-
Population (persons) on 31 December 2011	2,171,857	38,538,447	5.6
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	30,087	492,646	6.1

Secondary schools graduates (persons) in 2011	27,934	421,724	6.6
Number of employed persons on 31 December 2011	803,560	13,911,203	5.8%
Structure of employed persons in 2011	agriculture 27.6% industry 21.5% services 50.9%	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	521.2	61,600.3	0.8
Capital of companies (PLN mln) in 2010	1,269	188,812.4	0.7
Special economic zones (SEZs) in the voivodship			
<div>- The Tarnobrzeg SEZ, subzones: Horodło, Janów Lubelski, Łuków, Poniatowa, Tomaszów Lubelski, Kraśnik (city), Tomaszów Lubelski (city), Ryki</div> <div>- The Starachowice SEZ, subzone: Puławy (city)</div> <div>- The Mielec SEZ, subzone: Lublin (city), Radzyń Podlaski (city), Zamość (city), Lubartów (city)</div>			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)		-	
Real investment attractiveness (economic effects evaluation)		-	
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Chełm (city), Zamość(city), .Lublin (city)	
	Class B	Biała Podlaska (city)	
Gminas**	Class A	Świdnik (1), Zamość (1), Lublin (1), Chełm (1), Kraśnik (1), Puławy (1), Lubartów (1), Tomaszów Lubelski (1), Łęczna (3), Włodawa (1), Puchaczów (2), Biłgoraj (1), Radzyń Podlaski (1), Biała Podlaska (1), Łuków (1), Rejowiec Fabryczny (1), Stoczek Łukowski (1), Międzyrzec Podlaski (1), Poniatowa (3)	
	Class B	Janów Lubelski (3), Krasnostaw (1), Hrubieszów (1), Dęblin (1), Wólka (2), Lubartów (2), Terespol (1), Kazimierz Dolny (3), Łukowa (2)	

In 2009 Lublin voivodship made a contribution of 3.8% to the GDP of Poland. Calculated per capita, it amounted to PLN 23,651 PLN with the average for Poland PLN 35,210. With this result the voivodship occupies the sixteenth place in the country. The GDP growth rate in the period 2003-2009 amounted to 149.4% while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (50.9%) whereas a share of the agricultural and industrial sectors is respectively 27.6% and 21.5% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 2,171,857 (as of 2011), which makes up 5.6% of the population of Poland. The age structure of Lublin voivodship in 2010 was as follows: 15.3% of the population at pre-reproductive age, 67% at reproductive age and 17.7% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 13.3%, compared to

12.4% in Poland⁵. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3,174.3 PLN, which is 86.1% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 18 higher education institutions in which 96,2 thousand students study, which makes up 5.5% of all students Poland-wide. Moreover 5.7 % of pupils of secondary schools attend technikum schools and 4.8% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: industry (the manufacture of food products, the manufacture of furniture and manufacturing n.e.c., the manufacture of machinery and equipment, the manufacture of non-metallic mineral products, automobile industry, the manufacture of wood and wooden products, chemical industry), construction, market services (an important element of institutional business surroundings is the banking sector reinforced by financial institutions like credit and guarantee funds, leasing companies, credit unions), network services (especially electricity and gas supply), tourism, non-market services, agriculture (one of the most important branches of the economy of Lublin voivodship), education, R&D and the development of information society (knowledge-based economy).

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 3 special economic zones (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Tarnobrzaska SSE (Tarnobrzeg special economic zone), subzones: Horodło, Janów Lubelski, Łuków, Poniatowa, Tomaszów Lubelski, the city of Kraśnik, the city of Tomaszów Lubelski, Ryki,
- Starachowicka SSE (Starachowice special economic zone), subzone: the city of Puławy,
- Mielecka SSE (Mielec special economic zone), subzones: the city of Lublin, the city of Radzyń Podlaski, the city of Zamość, the city of Lubartów.

⁵ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

4. The profile of regional economy of Lubusz (lubuskie) voivodship

Lubusz (*Lubuskie*) voivodship is situated in central-western Poland, it borders on Germany, which is an important element facilitating international economic cooperation. Fourteen border crossings and the membership of the Pro Europe Viadrina euroregion and Spree-Neisse-Bober euroregion create good conditions of economic cooperation. The main socio-economic and administrative centres are Gorzów Wielkopolski, the seat of governmental administration, and Zielona Góra, the seat of self-governmental authorities, both being at the same time the most attractive sites for investors.

The advantages of the voivodship include:

- a highly beneficial geopolitical location on a Western border, which allows access to attractive sales markets of Germany and other Western European countries,
- a beneficial location on an international traffic route, i.e. pan-European corridor East-West, which gives access to foreign markets,
- a very well-developed regional communications network in terms of both roads and railways, well-developed near-border infrastructure,
- 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),
- a very good access to the Internet (in this respect the voivodship belongs to the highest rated regions in Poland),
- its activity in euroregions; what particularly distinguishes the Lubus Land is the transborder location of international Viadrina University offering among others the following courses of study: management, international management, economics, international business administration, German law, German-Polish law, cultural studies,
- a high forest cover, tourist attractions (especially Muskauer Park in the gmina of Łęknica, a UNESCO World Heritage site) as well as numerous lakes, all conducive to the development of tourism,
- good conditions of the development of industry thanks to the presence of higher education institutions offering technical courses of studies⁶ and attractive investment offers from special economic zones.

⁶ In 2010 according to the rating of the Ministry of Science and Higher Education the Faculty of Mathematics, Computer Science and Econometrics of the University of Zielona Góra occupied the 10th position in Poland among all the best scientific establishments classified in the discipline mathematics and the basics of computer science and was ranked in the high category 2.

Chart 1. General characteristics of the economy of Lubusz voivodship

Feature	Lubusz voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	30,068	35,210	-
Population (persons) on 31 Decembre 2011	1,023,158	38,538,447	2.7
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	6,896	492,646	1.4
Secondary schools graduates (persons) in 2011	10,314	421,724	2.4
Number of employed persons on 31 December 2011	324,565	13,911,203	2.3%
Structure of employed persons in 2011	agriculture 7.6% industry 34.9% services 57.5%	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	813.6	61,600.3	1.3
Capital of companies (PLN mln) in 2010	2,027.5	188,812.4	1.1
Special economic zones (SEZs) in the voivodship			
<div>- The Wałbrzych SEZ, subzone Szprotawa</div> <div>- The Kostrzyn-Słubice SEZ: subzones: Bytom Odrzański, Czerwieńsk, Dobiegniew, Gorzów Wielkopolski (city), Gubin (city), Gubin, Kargowa, Kostrzyn nad Odrą (city), Kożuchów, Lubsko, Międzyrzecz, Nowa Sól (city), Rzepin, Skwierzyna, Słubice, Sulęcín, Zielona Góra (city), Zielona Góra</div>			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)		Tourism class C	
Real investment attractiveness (economic effects evaluation)			
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Gorzów Wielkopolski (city), Zielona Góra (city)	
	Class B		
Gminas**	Class A	Zielona Góra (1), Gorzów Wielkopolski (1), Gubin (1), Nowa Sól (1), Żary (1), Kostrzyn nad Odrą (1), Żagań (1), Lubrza (2), Łęknica (1), Słubice (3)	
	Class B	Sulechów (3), Babimost (3), Świebodzin (3), Kłodawa (2), Zbąszynek (3), Lubsko (3), Wschowa (3), Witnica (3), Skwierzyna (3), Zielona Góra (2), Bytom Odrzański (3)	

In 2009 Lubusz voivodship made a contribution of 2.3% to the GDP of Poland. Calculated per capita, it amounted to PLN 30.068 with the average for Poland PLN 35,210. With this result the voivodship occupies the ninth place in the country. The GDP growth rate in the period 2003-2009 amounted to 157.7% while the national average reached 168.5%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (57.5%) whereas a share of the agricultural and industrial sectors is respectively 7.6% and 34.9% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 1.023.158 (as of 2011), which makes up 2.7% of the population of Poland. The age structure of Lubusz voivodship was in 2010 as follows: 15.4% of the population at pre-reproductive age, 69.4% at reproductive age and 15.2% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 14.9%, compared to 12.4% in Poland⁷. The average gross monthly remuneration in enterprises sector in September 2010 amounted to PLN 3,068.5, which is 83.2% of the average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 8 higher education institutions in which 23.9 thousand students study, which makes up 1.4% of all students Poland-wide. In this voivodship 3% of pupils of secondary schools attend basic vocational schools and 2.9% attend technical secondary schools.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 2 special economic zone (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Kostrzyńsko-Słubicka SSE (Kostrzyń-Słubice special economic zone), subzone: Bytom Odrzański, Czerwieńsk, Dobiegniew, the city of Gorzów Wielkopolski, the city of Gubin, Gubin, Kargowa, the city of Kostrzyn nad Odrą, Kożuchów, Lubsco, Międzyrzecz, the city of Nowa Sól, Rzepin, Skwierzyna, Słubice, Sulęcín, the city of Zielona Góra, Zielona Góra,

- Wałbrzyska SSE (Wałbrzych special economic zone), subzone Szprotawa.

⁷ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

5. The profile of regional economy of Łódź voivodship

Łódź voivodship is situated in the centre of Poland and at the same time in the centre of Europe. It is a region with industrial traditions associated with textile industry and the manufacture of clothing. Nowadays, thanks to Łódź, Poland's third largest city, other branches of industry develop in the region, in particular the manufacture of household appliances (white and brown goods) and biotech industry.

The advantages of the voivodship are:

- its excellent location in terms of communications; in the voivodship, in the vicinity of Stryków, a node of highways is planned thanks to which the voivodship will be the best site in Poland for investments targetted at domestic market,
- access to substantial human resources including not only cheap low-qualified workers but also well-qualified employees, which is possible thanks to the presence of numerous higher and vocational education institutions,
- a huge R&D potential of the higher education institutions and research establishments of the area of Łódź⁸,
- substantial resources of brown coal thanks to which the surplus of cheap electricity is available in the voivodship,
- very large resources of thermal waters which can set the foundations for the development of renewable energy and health resorts in the region,
- attractive investment offers for investors in the locations of special economic zones.

⁸ In 2010 the Ministry of Science and Higher Education ranked among the best scientific establishments in Poland the following ones: the Faculty of Chemistry, the Faculty of Mechanics, the Faculty of Construction, Architecture and Environmental Engineering and the Faculty of Biotechnology and Food Studies of the Technical University of Łódź, The Centre of Molecular and Macromolecular Studies of The Polish Academy of Sciences in Łódź, the Faculty of Economics and Sociology of the University of Łódź, Polish Mother's Memorial Hospital Research Institute in Łódź, The Professor Jerzy Nofer Institute of Occupational Medicine in Łódź, The Institute of Medical Biology of The Polish Academy of Sciences in Łódź and The International Institute of The Polish Academy of Sciences in Łódź – European Regional Centre for Ecohydrology in Łódź.

Chart 1. General characteristics of the economy of Łódź voivodship

Feature	Łódź voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	32,162	35,210	-
Population (persons) on 31 December 2011	2,533,681	38,538,447	6.6
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	30,456	492,646	6.2
Secondary schools graduates (persons) in 2011	25,530	421,724	6.1
Number of employed persons on 31 December 2011	933,578	13,911,203	6.7%
Structure of employed persons in 2011	agriculture 13.1% industry 32.4% services 54.5%	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	2,513.4	61,600.3	4.1
Capital of companies (PLN mln)	4,627.6	188,812.4	2.5
Special economic zones (SEZs) in the voivodship			
<div>- The Łódź SEZ, subzones: Aleksandrów Łódzki, Bełchatów (city), Brójce (city), Kleszczów, Koluszki, Konstantynów Łódzki (city), Ksawerów, Kutno (city), Łęczyca (city), Łowicz (city), Łódź (city), Opoczno, Ozorków (city), Paradyż, Piotrków Trybunalski (city), Radomsko (city), Rawa Mazowiecka (city), Sieradz (city), Skierniewice (city), Sławno, Stryków, Tomaszów Mazowiecki (city), Tomaszów Mazowiecki, Ujazd, Widawa, Wieluń, Wola Krzysztoporska, Wolbórz, Wróblew, Zduńska Wola (city), Zgierz (city), Zgierz, Żychlin</div> <div>- The Starachowice SEZ, subzone Mniszków</div>			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)		National economy class C Labour-intensive industry class C Trade class C	
Real investment attractiveness (economic effects evaluation)		National economy class b Trade class B Tourism class A	
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Łódź (city), Piotrków Trybunalski (city), Skierniewice (city), Bełchatów	
	Class B		
Gminas**	Class A	Kleszczów (2), Skierniewice (1), Rawa Mazowiecka (1), Bełchatów (1), Pabianice (1), Łódź (1), Piotrków Trybunalski (1), Tomaszów Mazowiecki (1), Aleksandrów Łódzki (3), Zgierz (1), Łowicz (1), Głowno (1), Nowosolna (2), Andrespol (2), Konstantynów Łódzki (1), Kutno (1), Rzgów (3), Brzeziny (1),	

		Zduńska Wola (1), Łęczyca (1)
	Class B	Dłutów (2), Radomsko (1), Rząśnia (2), Sieradz (1), Tuszyn (3), Stryków (3), Rawa Mazowiecka (2), Ozorków (1), Ksawerów (2), Szczerców (2), Działoszyń (3)

In 2009 Łódź voivodship made a contribution of 6.1% to the GDP of Poland. Calculated per capita, it amounted to PLN 32,162 with the average for Poland PLN 35,210. With this result the voivodship occupies the sixth place in the country. The GDP growth rate in the period 2003-2009 amounted to 154.5% while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (54.5%) whereas a share of the agricultural and industrial sectors is respectively 13.1% and 32.4% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 2,533,681 (as of 2011), which makes up 6.6% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 14% of the population at pre-reproductive age, 67.2% at reproductive age and 18.5% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 13%, compared to 12.4% in Poland⁹. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3,338.7, which is 90.6% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 30 higher education institutions in which 108.2 thousand students study, which makes up 6.2% of all students Poland-wide. Moreover 6.0 % of pupils of secondary schools attend technikum schools and 5.1% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: e-business, IT and telecommunications as well as the following branches: power industry, logistics, textile industry, the manufacture of food, construction, the manufacture of chemical products and biotechnology.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 2 special economic zones (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Łódzka SSE (Łódź special economic zone), subzones: Aleksandrów Łódzki, the city of Bełchatów, Brójce, Kleszczów, Koluszki, the city of Konstantynów Łódzki, Ksawerów, the city of Kutno, the city of Łęczyca, the city of Łowicz, the city of Łódź, Opoczno, the city of Ozorków, Paradyż, the city of Piotrków Trybunalski, the city of Radomsko, the city of Rawa Mazowiecka, the city of Sieradz, the city of Skierniewice, Sławno, Stryków, the city of Tomaszów Mazowiecki, Tomaszów Mazowiecki, Ujazd, Widawa, Wieluń, Wola Krzysztoporska, Wolbórz, Wróblew, the city of Zduńska Wola, the city of Zgierz, Zgierz, Żychlin,
- Starachowicka SSE (Starachowice special economic zone), subzone Mniszków.

⁹ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

6. The profile of regional economy of Lesser Poland (małopolskie) voivodship

Lesser Poland (*małopolskie*) voivodship is situated in central-southern Poland, it borders on Slovakia. It is an important region for Polish tourism because of its attractive mountain areas in the south of the voivodship (the Tatra mountains and the Podhale) as well as numerous cultural monuments. Cracow, a former capital of Poland, now its second largest city, plays a particular role for Lesser Poland and for the economy of entire Poland. Lesser Poland stands out in terms of a very high density of population, which is chiefly due to the land fragmentation.

The advantages of the voivodship are:

- a convenient location in terms of communications: a main transit corridor from Western Europe to the Ukraine (A4 highway), convenient train connection (the European transport corridor TINA III runs through the region); international airport in Kraków-Balice (the second largest airport in Poland); six road border crossings and one railway border crossing in Leluchów,
- huge R&D potential of the higher education institutions and research establishments of Cracow among which scientific establishments ranked by the Ministry of Science and Higher Education in the highest category constitute a numerous group,
- substantial human resources, both low-qualified workers with low wage expectations and well-qualified specialists,
- great tourist attractions, in particular UNESCO World Heritage sites deserve a note: The Old Town in Cracow, Auschwitz-Birkenau. German Nazi Concentration and Extermination Camp (1940-1945), Wieliczka Salt Mine, the Mannerist Architectural and Park Landscape Complex and Pilgrimage Park in Kalwaria Zebrzydowska, wooden churches of southern Lesser Poland in Binarowa, Blizne, Lipnica Murowana, Sękowa) and natural conditions of mountain areas and Carpathian Foothills,
- investment incentives for investors offered in special economic zones.

Chart 1. General characteristics of the economy of Lesser Poland voivodship

Feature	Lesser Poland voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	30,220	35,210	-
Population (persons) on 30 December 2011	3,346,796	38,538,447	8.7
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	54,978	492,646	11.2

Secondary schools graduates (persons) in 2011	40,754	421,724	9.7
Number of employed persons on 31 December 2011	1,240,844	13,911,203	8.9%
Structure of employed persons in 2011	agriculture 14% industry 30% services 56%	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	2,269.2	61,600.3	3.7
Capital of companies (PLN mln) in 2010	10,989.0	188,812.4	5.8
Special economic zones (SEZs) in the voivodship			
<div>- The Katowice SEZ, subzone: Myślenice</div> <div>- The Mielec SEZ, subzone Gorlice (city),</div> <div>- The Cracow SEZ: subzones: Bukowno (city), Chełmek, Dobczyce, Gdów, Kraków (city), Książ Wielki, Limanowa (city), Niepołomice, Nowy Sącz (city), Oświęcim (city), Skawina, Słomniki, Tarnów (city), Wolbrom, Zabierzów, Zator</div>			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation) in 2010		National economy class B Capital-intensive industry class B Labour-intensive industry class B Trade class B Tourism class B Education class C	
Real investment attractiveness (economic effects evaluation) in 2010		National economy class C Industry class C Trade class C Professional science and technical activities C	
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Kraków (city), Nowy Sącz (city), Tarnów (city)	
	Class B	Wieliczka	
Gminas**	Class A	Kraków (1), Gorlice (1), Wielka Wieś (2), Nowy Sącz (1), Tarnów (1), Limanowa (1), Bochnia (1), Oświęcim (1), Niepołomice (3), Zielonki (2), Wadowice (3), Zakopane (1), Zabierzów (2), Skawina (3), Bukowno (1), Kęty (3), Chrzanów (3), Andrychów (3), Mszana Dolna (1), Skała (3), Olkusz (3), Zator (3), Dobczyce (3), Mogilany (2), Alwernia (3), Kłaj (2), Bolesław (2), Trzebinia (3), Nowy Targ (1), Krzeszowice (3), Wieliczka (3), Brzeszcze (3), Klucze (2), Krynica-Zdrój (3), Świątniki Górne (3)	
	Class B	Myślenice (3), Siepraw (2), Michałowice (2), Muszyna (3), Sucha Beskidzka (1), Wolbrom (3), Grybów (1), Libiąż (3), Liszki (2), Tymbark (2), Chełmek (3), Dębno (2), Szczawnica (3), Przeciszów (2), Brzesko (3), Jordanów (1), Tarnów (2), Żegocina (2), Bochnia (2), Spytkowice (2), Rabka-Zdrój (3), Osiek (2), Spytkowice (2), Polanka Wielka (2), Jerzmanowice-Przeginia (2), Pcim (2), Gdów (2), Skrzyszów (2)	

In 2009 Lesser Poland voivodship made a contribution of 7.4% to the GDP of Poland. . Calculated per capita, it amounted to PLN 30,220 with the average for Poland PLN 35,210.

With this result the voivodship occupies the tenth place in the country. The GDP growth rate in the period 2003-2009 amounted to 161.7% while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (56%) whereas a share of the agricultural and industrial sectors is respectively 14% and 30% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 3,346,796 (as of 2011), which makes up 8.7% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 15.9% of the population at pre-reproductive age, 67.5% at reproductive age and 16.6% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 10.6%, compared to 12.4% in Poland¹⁰. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3,356.8, which is 91.1% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 33 higher education institutions in which 208.1 thousand students study, which makes up 12% of all students Poland-wide. Moreover 9.2 % of pupils of secondary schools attend technikum schools and 10% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: education, higher education, R&D, information society, high-tech industry as well as tourism and culture.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 3 special economic zone (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Katowicka SSE (Katowice special economic zone), subzone: Myślenice,
- Mielecka SSE (Mielec specific economic zone), subzone the city of Gorlice,
- Krakowska SSE (Cracow special economic zone), subzones: the city of Bukowno, Chełmek, Dobczyce, Gdów, the city of Kraków, Książ Wielki, the city of Limanowa, Niepołomice, the city of Nowy Sącz, the city of Oświęcim, Skawina, Słomniki, the city of Tarnów, Wolbrom, Zabierzów, Zator.

¹⁰ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

7. The profile of regional economy of Masovian voivodship

Masovian voivodship is situated in central-eastern Poland in the Masovian Lowlands. It is the largest and most populous region of Poland. It is the most economically developed and attractive voivodship and distances all other regions of Poland in terms of GDP per capita. A characteristic feature of the region is its servitisation, which means that in accordance with a high level of economic development modern services like financial intermediation, business services, telecommunications and education play an important role. Moreover, almost every branch of industry has developed in Masovia, including in particular the manufacture of means of transport and petrochemical industry. The administrative centre is Warsaw, the capital city of Poland, which is jointly with its suburban area one of the most attractive areas in the whole country.

The advantages of the voivodship are:

- its central location at the intersection of traffic routes and in the trans-European transport corridors providing connection with the larger cities of Poland and Europe,
- Poland's largest international airport, i.e. Warsaw Chopin Airport, which handles almost 50% of the whole passenger traffic in Poland and maintains ca. 100 regular plane connections with domestic and foreign airports,
- the presence of numerous higher education institutions and research establishments,¹¹
- the highest GDP per capita rate in the country,
- substantial human resources, including both low-qualified workers with low wage expectation and specialists trained in various fields,
- very high labour productivity compensating a relatively high level of remunerations,
- the presence of Warsaw Stock Exchange, the capital centre of Central and Eastern Europe,
- investment incentives for investors offered in special economic zones.

¹¹ In 2010 the Ministry of Science and Higher Education ranked in total 88 scientific establishments which represent all disciplines important for investors in the class 1, i.e. the best scientific establishments in Poland. In Masovian voivodship most distinguished were scientific establishments in such scientific disciplines as: chemical sciences and materials, chemical and process engineering (7 establishments, chiefly faculties or institutes of the Warsaw University of Technology and the Polish Academy of Sciences); electrotechnics, automatics, electronics and information technologies (9 establishments representing the Warsaw University of Technology and the Military University of Technology); economic sciences (9 establishments, chiefly establishments representing the Warsaw School of Economics); research and clinical establishments (5 establishments); biological sciences (5 establishments, chiefly the ones of the Polish Academy of Sciences).

Additional information**Chart. 1. General characteristics of the economy of Masovian voivodship**

Feature	Masovian voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	56,383	35,210	-
Population (persons) on 31 December 2011	5,285,604	38,538,447	13.7
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	83,178	492,646	16.9
Secondary schools graduates (persons) in 2011	53,275	421,724	12.6
Number of employed persons on 31 December 2011	2,262,092	13,911,203	16.3%
Structure of employed persons in 2011	agriculture 11.6% industry 22.7% services 65.7%	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	28,603.9	61,600.3	46.4
Capital of companies (PLN mln) in 2010	92,921.4	188,812.4	49.2
Special economic zones (SEZs) in the voivodship			
<ul style="list-style-type: none"> - The Warmian-Masurian SEZ, subzones: Ciechanów, Ciechanów (city), Mława (city), Ostrołęka (city), - The Tarnobrzeg SEZ, subzones: Nowe Miasto nad Pilicą, Ożarów Mazowiecki, Pilawa, Przasnysz, Węgrów, Wyszaków, Pionki (city), Radom (city), Siedlce (city), Siedlce - The Łódź SEZ, subzones: Grodzisk Mazowiecki, Żabia Wola, Płock (city), Raciąż (city), Warszawa (city), Żyrardów (city), Pruszków (city), - The Suwałki SEZ, subzone Małkinia Górna, - The Starachowice SEZ, subzones: Iłża, Szydłowiec 			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)	National economy class A Capital-intensive industry class A Labour-intensive industry class A Trade class A Tourism class A Education class A		
Real investment attractiveness (economic effects evaluation)	National economy class A Industry class C Trade class A Tourism class A Professional science and technical education class A		

Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy		
Poviats	Class A	Warszawa (City), Płock (City), Ostrołęka (City), Siedlce (City), Piaseczyński, Pruszkowski, Radom (City), Grodziski, Warszawski Zachodni, Legionowski
	Class B	
Gminas**	Class A	M.st. Warszawa (1), Legionowo (1), Lesznowola (2), Żąbki (1), Piaseczno (3), Płońsk (1), Piastów (1), Mińsk Mazowiecki (1), Pruszków (1), Michałowice (2), Podkowa Leśna (1), Ostrołęka (1), Płock (1), Pionki (1), Stare Babice (2), Siedlce (1), Raszyn (2), Żyrardów (1), Ciechanów (1), Nadarzyn (2), Ożarów Mazowiecki (3), Milanówek (1), Konstancin-Jeziorna (3), Radom (1), Słupno (2), Grodzisk Mazowiecki (3), Nowy Dwór Mazowiecki (1), Sulejówek (1), Marki (1), Garwolin (1), Nieporęt (2), Kobylka (1), Radzymin (3), Ostrów Mazowiecka (1), Serock (3), Łomianki (3), Kozienice (3), Tarczyn (3), Izabelin (2), Józefów (1), Wyszaków (3), Maków Mazowiecki (1), Otwock (1), Wołomin (3), Błonie (3), Mława (1), Sokołów Podlaski (1), Grójec (3), Czosnów (2), Zielonka (1), Brwinów (3)
	Class B	Sochaczew (1), Wieliszew (2), Halinów (3), Białobrzegi (3), Jaktorów (2), Sierpc (1), Siedlce (2), Węgrów (1), Gostynin (1), Garwolin (2), Przasnysz (1), Góra Kalwaria (3), Rzekuń (2), Kołbiel (2), Stara Biała (2), Różan (3), Radziejowice (2)

In 2009 Masovian voivodship made a contribution of 21.9% to the GDP of Poland. Calculated per capita, it amounted to PLN 56,383 with the average for Poland PLN 35,210. With this result the voivodship occupies the first place in the country. The GDP growth rate in the period 2003-2009 amounted to 167% while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (65.7%) whereas a share of the agricultural and industrial sectors is respectively 11.6% and 22.7% (CSO, RDB 2012).

The number of inhabitants of the voivodship in 2011 amounts to 5,285,604, which is 13.7% of the population of Poland. The age structure of Masovian voivodship in 2010 was as follows: 15.2% of the population at pre-reproductive age, 67% at reproductive age and 17.80% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 10.1%, compared to 12.4% in Poland¹². The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 4.496,7, which is 122% of average remuneration in Poland.

The main potential for human capital creation in the voivodship lies in 106 higher education institutions in which 307.1 thousand students study, which makes up 17.7% of students Poland-wide. In this voivodship 9.3% of pupils of secondary schools attend basic vocational schools and 11.1% attend technical secondary schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: agriculture, construction, trade, services, tourism (especially foreign tourism), the manufacture of chemicals, logistics, the manufacture of food, the growth of innovativeness and competitiveness of region's economy, the development of telecommunications, improvement in communications and transport in the region including civil aviation, the multifunctional development of rural areas.

¹² 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 5 special economic zones (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Warmińsko-Mazurska SSE (Warmia-Mazury special economic zone), subzones: Ciechanów, the city of Ciechanów, the city of Mława, the city of Ostrołęka,
- Tarnobrzaska SSE (Tarnobrzeg special economic zone), subzones: Nowe Miasto nad Pilicą, Ożarów Mazowiecki, Pilawa, Przasnysz, Węgrów, Wyszaków, the city of Pionki, the city of Radom, the city of Siedlce, Siedlce,
- Łódzka SSE (Łódź special economic zone), subzones: Grodzisk Mazowiecki, Żabia Wola, the city of Płock, the city of Raciąż, the city of Warszawa, the city of Żyrardów, the city of Pruszków,
- Starachowicka SSE (Starachowice special economic zone), subzones: Ilża, Szydłowiec,
- Suwalska SSE (Suwałki special economic zone), subzone Małkinia Górna.

8. The profile of regional economy of Opole voivodship

Opolskie voivodship is situated in the south-western part of Poland. It is a region with very intensive agriculture thanks to which it is a beneficial location for food industry. The high level of agrarian culture is conducive to this and so are very fertile soils. The region has long-established industrial traditions, in particular in the manufacture of food, mineral products, metal products, machinery and equipment as well as chemicals and chemical products. Its near-border location and numerous border crossings (both road and railway ones) predisposes the region to cooperation with Germany and the Czech Republic.

The advantages of the voivodship are also:

- its location on main domestic and European traffic routes (A4 highway),
- an excellent access to inland shipping thanks to the Oder and the Gliwice-Kędzierzyn Koźle channel (the port in Kędzierzyn is the largest inland port in Poland),
- well-developed communications infrastructure including access to the Internet (the voivodship belongs to the highest rated regions in Poland),
- the presence of higher education institutions,¹³
- rich resources for the manufacture of mineral products – the possibility of specialisation in sectors supporting the construction industry,
- the multicultural mindset of the inhabitants of the voivodship which results in their tolerance and openness to the inflow of foreign capital; this feature is strengthened by the membership of Opole voivodship of the Praded euroregion and the Silesia euroregion.

Chart 1. General characteristics of the economy of Opole voivodship

Feature	Opole voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	28,761	35,210	-
Population (persons) on 31 December 2011	1,013,950	38,538,447	2.6
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	11,492	492,646	2.3

¹³ In 2010 the Ministry of Science and Higher Education ranked among the best scientific establishments in Poland the following ones: the Institute of Heavy Organic Synthesis 'Blachownia' in Kędzierzyn-Koźle, the Faculty of Construction and the Faculty of Technical and IT Education of the Opole University of Technology, the Faculty of Philology of the University of Opole.

Secondary schools graduates (persons) in 2011	11,067	421,724	2.6
Number of employed persons on 31 December 2011	314.242	13.911.203	2.3
Structure of employed persons in 2011	agriculture 11.9% industry 36.5% services 51.6%	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	749.9	61,600.3	1.2
Capital of companies (PLN mln) in 2010	1,729.7	188,812.4	0.9
Special economic zones (SEZs) in the voivodship			
<div>- The Wałbrzych SEZ, subzones: Kluczbork, Namysłów, Nysa, Praszka, Prudnik, Skarbimierz, Opole (city),</div> <div>- The Katowice SEZ, subzones: Gogolin, Kietrz, Krapkowice, Strzelce Opolskie, Ujazd, Kędzierzyn-Koźle (city)</div> <div>- The Starachowice SEZ, subzone Tułowice</div>			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)			
Real investment attractiveness (economic effects evaluation)		National economy class C Trade class C	
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Opole (city)	
	Class B		
Gminas**	Class A	Brzeg (1), Opole (1), Kędzierzyn-Koźle (1), Zdzeszowice (3), Dobrzeń Wielki (2), Prudnik (3), Tułowice (2), Skarbimierz (2) , Namysłów (3), Gogolin (3)	
	Class B	Nysa (3), Chrzastowice (2), Kluczbork (3), Bierawa (2), Krapkowice (3), Ujazd (3), Niemodlin (3), Tarnów Opolski (2)	

In 2009 Opole voivodship made a contribution of 2.2% to the GDP of Poland. . Calculated per capita, it amounted to PLN 28.761 with the average for Poland PLN 35,210. With this result the voivodship occupies the eleventh place in the country. The GDP growth rate in the period 2003-2009 amounted to 160.2% while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (51.6%) whereas a share of the agricultural and industrial sectors is respectively 11.9% and 36.5% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 1.013.950 (as of 2011), which makes up 2.6% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 13.4% of the population at pre-reproductive age, 69.2% at reproductive age and 17.4% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 13.1%, compared to

12.4% in Poland¹⁴. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3.231,0, which is 87.6% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 6 higher education institutions in which 38 thousand students study, which makes up 2.2% of all students Poland-wide. Moreover 2.6 % of pupils of secondary schools attend technikum schools and 3.1% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: the manufacture of chemicals and chemical products, the manufacture of food, construction and others: power industry, the manufacture of machinery and equipment, the manufacture of metallic and non-metallic mineral products, timber industry.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 3 special economic zone (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Wałbrzyska SSE (Wałbrzych special economic zone), subzones: Kluczbork, Namysłów, Nysa, Praszka, Prudnik, Skarbimierz, the city of Opole,
- Katowicka SSE (Katowice special economic zone), subzones: Gogolin, Kietrz, Krapkowice, Strzelce Opolskie, Ujazd, the city of Kędzierzyn-Koźle,
- Starachowicka SSE (Starachowice special economic zone), subzone Tułowice.

¹⁴ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

9. The profile of regional economy of Subcarpathian voivodship

Subcarpathian voivodship is situated in south-eastern Poland. It borders on Slovakia (in the south) and the Ukraine (in the east). The region is endowed with rich deposits of such resources as: sulphur, oil and natural gas as well as mineral resources like gypsum, sandstones and limestone currently extracted in active modern mines. The main sectors of economy are agriculture, industry, extraction, the manufacture of food, the manufacture of pharmaceuticals, aviation and IT.

The main advantages of the voivodship are:

- the developing aviation industry,
- a well-established manufacture of pharmaceuticals, IT and food industry,
- the establishment of the Subcarpathian Science and Technology Park in Rzeszów,
- good transport connections: international airport, A4 highway, main transport corridors of the TINA network running through the voivodship,
- natural resources like sulphur, oil and natural gas, mineral resources extracted mainly in its mountainous southern part: sandstones, limestone, gypsum (including gypsum alabaster), ceramic loams, sands (including sands suitable for glass-making) and gravel as well as peat, mineral and thermal waters,
- large areas of forests make the voivodship an important producer of timber and give an opportunity of using wood biomass for the production of renewable energy,
- the accessibility of well-skilled human resources trained in management and technical fields, in particular in aviation, manufacture of electric machinery and manufacture of chemicals and chemical products (The Rzeszów University of Technology is the largest technical higher education institution of south-eastern Poland and the only training centre for civil pilots in Poland),
- a quite high potential attractiveness rank for trade.

Additional information

Chart 1. General characteristics of the economy of Subcarpathian voivodship

Feature	Subcarpathian voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	24,131	35,210	-
Population (persons) on 31 Decembre 2011	2,128,687	38,538,447	5.5
Human Resources Potential			

Higher education institutions graduates (persons) in 2011	21,790	492,646	4.4
Secondary schools graduates (persons) in 2011	29,117	421,724	6.9
Number of employed persons on 31 December 2011	794.727	13.911.203	5.7%
Structure of employed persons in 2011	agriculture 21.4% industry 30.4% services 48.2%	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	873.9	61,600.3	1.4
Capital of companies (PLN mln) in 2010	2,198.4	188,812.4	1.2
Special economic zones (SEZs) in the voivodship			
<div>- The Mielec SEZ, subzones: Dębica, Głogów Małopolski, Jarosław, Kolbuszowa, Laszki, Leżajsk, Ostrów, Ropczyce, Trzebownisko, Zagórz, Dębica (city), Jarosław (city), Leżajsk (city), Lubaczów (city), Mielec (city), Rzeszów (city), Sanok (city).</div> <div>- The Tarnobrzeg SEZ, subzone: Gorzyce, Jasło, Jedlicze, Nisko, Nowa Dęba, Orły, Rymanów, Jasło (city), Przemyśl (city), Przeworsk (city), Stalowa Wola (city), Tarnobrzeg (city),</div> <div>- The Cracow SEZ, subzones: Boguchwała, Krosno (city)</div>			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)			
Real investment attractiveness (economic effects evaluation)			
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Krosno (city), Przemyśl (city), Rzeszów (city),	
	Class B	Tarnobrzeg (city)	
Gminas**	Class A	Krosno (1), Jarosław (1), Rzeszów (1), Mielec (1), Jasło (1), Łańcut (1), Sanok (1), Dębica (1), Leżajsk (1), Przemyśl (1), Stalowa Wola (1), Przeworsk (1), Tarnobrzeg (1), Krościenko Wyzne (2), Boguchwała (3), Dębica (2), Lubaczów (1)	
	Class B	Ropczyce (3), Jedlicze (3), Ostrów (2), Kolbuszowa (3), Krasne (2), Głogów Małopolski (3), Radymno (1), Dukla (3), Gorzyce (2), Trzebownisko (2), Nowa Dęba (3), Jarosław (2), Besko (2), Solina (2), Lesko (3), Iwonicz-Zdrój (3), Miejsce Piastowe (2), Nowa Sarzyna (3), Żyraków (2), Nisko (3)	

In 2009 Subcarpathian voivodship made a contribution of 3.8% to the GDP of Poland. . Calculated per capita, it amounted to PLN 24.131 with the average for Poland PLN 35,210. With this result the voivodship occupies the fifteenth place in the country. The GDP growth rate in the period 2003-2009 amounted to 154,6%, while the national average reached 168.5%.

The number of inhabitants of the voivodship amounts to 3,298,270 (as of 2009), which makes up 8.6% of the population of Poland. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the

service sector (48.2%) whereas a share of the agricultural and industrial sectors is respectively 21.4% and 30.4% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 2,128,687 (as of 2011), which makes up 5.5% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 15.9% of the population at pre-reproductive age, 68.1% at reproductive age and 16.0% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.9%). The registered unemployment rate in the voivodship in August 2012 was 15.3%, compared to 12.4% in Poland¹⁵. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 2,994.1, which is 81.2% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 21 higher education institutions in which 70.9 thousand students study, which makes up 4.1% of all students Poland-wide. Moreover 6.7 % of pupils of secondary schools attend technikum schools and 5.8% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: aviation, the manufacture of electric machinery and equipment, food industry, the manufacture of chemicals and chemical products as well as tourism.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 3 special economic zone (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Mielecka SSE (Mielec special economic zone), subzones: Dębica, Głogów Małopolski, Jarosław, Kolbuszowa, Laszki, Leżajsk, Ostrów, Ropczyce, Trzebowno, Zagórz, the city of Dębica, the city of Jarosław, the city of Leżajsk, the city of Lubaczów, the city of Mielec, the city of Rzeszów, the city of Sanok;
- Tarnobrzaska SSE (Tarnobrzeg special economic zone), subzone: Gorzyce, Jasło, Jedlicze, Nisko, Nowa Dęba, Orły, Rymanów, the city of Jasło, the city of Przemyśl, the city of Przeworsk, the city of Stalowa Wola, the city of Tarnobrzeg;
- Krakowska SSE (Cracow special economic zone), subzones: Boguchwała, the city of Krosno.

¹⁵ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

10. The profile of regional economy of Podlaskie voivodship

Podlaskie voivodship is situated in north-eastern Poland. It borders on Lithuania and Belarus. It is a mainly agricultural region with dynamically developing food sector, chiefly food processing (milk, meat, poultry, cereals processing) and the following sectors: light industry, timber industry, construction and the manufacture of machinery and equipment.

The following phenomena can be considered the advantages of this voivodship:

- its location in the centre of Europe and in the European Union, which plays a principal role both in local transport and in a network of international transport,
- there are many express roads in this voivodship the most important of which are routes Berlin-Warsaw-Grodno-Sankt Petersburg and Warsaw-Helsinki (part of Via Baltica express road, which connects Baltic countries with Western Europe),
- a huge area of grasslands creates good conditions of farming of cattle, mainly dairy cattle,
- an opportunity of creating local biogas facilities and production of renewable energy arises because of favourable conditions for animal husbandry,
- voivodship's human capital is built by the largest universities in the region, i.e.:
 - the University of Białystok – main courses of study: computer science, biology, chemistry, economics, physics, mathematics, environmental protection, law, sociology, East-Slavonic philology,
 - the Białystok University of Technology – main courses of study: architecture and urban studies, industrial automatics, construction, electronics and telecommunications, electrical engineering, computer science, environmental protection engineering, mechanics and machine design, production management,
- low labours costs are accompanied by relatively high labour productivity,
- relatively high innovativeness in comparison to the level of economic development,
- there are four national parks in the region: the Białowieża National Park (a UNESCO World Heritage site), the Biebrza National Park, the Narew National Park, the Wigry National Park.

Chart 1. General characteristics of the economy of Podlaskie voivodship

Feature	Podlaskie voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	25,951	35,210	-
Population (persons) on 30 December 2011	1,200,982	38,538,447	3.1
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	15,261	492,646	3.1
Secondary schools graduates (persons) in 2011	14,443	421,724	3.4
Number of employed persons on 31 December 2011	403,128	13,911,203	2.9%
Structure of employed persons in 2011	agriculture 23.6% industry 23.4% services 53%	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	515.8	61,600.3	0.8
Capital of companies (PLN mln) in 2010	536.8	188,812.4	0.3
Special economic zones (SEZs) in the voivodship			
- The Suwałki SEZ, subzone: Grajewo, Suwałki (city), Białystok (city), Grajewo (city) - The Tarnobrzeg SEZ, subzone: Łapy			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)			
Real investment attractiveness (economic effects evaluation)			
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Białystok (city),	
	Class B	Suwałki (city), Łomża (city)	
Gminas**	Class A	Białystok (1), Wysokie Mazowieckie (1), Brańsk (1), Hajnówka (1), Łomża (1), Sejny (1), Bielsk Podlaski (1), Siemiatycze (1), Suwałki (1)	
	Class B	Zambrów (1), Supraśl (3), Wasilków (3), Łapy (3), Grajewo (1), Augustów (1), Choroszcz (3), Juchnowiec Kościelny (2)	

In 2009 Podlaskie voivodship made a contribution of 2.3% to the GDP of Poland. . Calculated per capita, it amounted to PLN 25.951 with the average for Poland PLN 35,210. With this result the voivodship occupies the fourteenth place in the country. The GDP growth rate in the period 2003-2009 amounted to 152,9%, while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (53%) whereas a share of the agricultural and industrial sectors is respectively 23.6% and 23.4% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 1.200.982 (as of 2011), which makes up 3.1% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 14.8% of the population at pre-reproductive age, 67.5% at reproductive age and 17.6% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 13.9%, compared to 12.4% in Poland¹⁶. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3,121.3, which is 84.7% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 18 higher education institutions in which 50.9 thousand students study, which makes up 2.9% of all students Poland-wide. Moreover 3.5 % of pupils of secondary schools attend technikum schools and 2.2% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: the manufacture of food, the manufacture of machinery and equipment, timber industry and the manufacture of furniture as well as tourism.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 2 special economic zone (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Suwalska SSE (Suwałki special economic zone), subzone: Grajewo, the city of Suwałki, the city of Białystok, the city of Grajewo,
- Tarnobrzaska SSE (Tarnobrzeg special economic zone), subzone: Łapy.

¹⁶ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

11. The profile of regional economy of Pomeranian voivodship

The economy of Pomeranian voivodship is one of the best developing regional economies in Poland. Its coastal location is conducive to the development of maritime economy in the region: manufacture and repair of vessels and management of ports, fishery or coastal tourism. Recent years are characterised by the robust growth of boat-building: in little shipyards both modern yachts and replicas of medieval boats are built.

The main advantages of the voivodship are:

- there are two science and technology parks and two special economic zones in the voivodship. Among others a production plant manufacturing electronic subassemblies and modern pharmaceutical production plants operate on their premises.
- The Little 'Silicon Valley' comes into being on the outskirts of Gdańsk, where their seats have among others a manufacturer of access control devices (Satel), a manufacturer of multimedia software (Young Digital Planet) and a R&D centre of Intel Technology Poland. The company DGT, a well-known manufacturer of modern communications systems, operates near Gdańsk. In Pomeranian voivodship 8% of all Polish IT companies operate and what is more 18% of computer software is made in the voivodship.
- Pomerania is the world leader in amber products. In more than 3 thousand little workshops about 10 thousand artisans and artists work and design jewellery. Their annual revenue, especially export revenue, is estimated to exceed \$ 300 mln. In 2006 the only Museum of Amber in the world was opened in Gdańsk.
- favourable natural conditions conducive to the development of tourism,
- there is a significant port complex in the region of both domestic and international importance,
- huge R&D potential of voivodship's higher education institutions and research establishments. What distinguishes the system of education in the region is the presence of higher education institutions offering courses of study connected with maritime economy ranked high (category 1) by the Ministry of Science and Higher Education (the Institute of Hydroengineering, Maritime Institute),
- there are broad investment prospects in Pomeranian voivodship, which is confirmed by very high potential and real investment attractiveness ranks for: national economy, capital-intensive industry, labour-intensive industry, trade, tourism, financial intermediation, business services and education.

Chart 1. General characteristics of the economy of Pomeranian voivodship

Chart 1: General characteristics of the economy of Pomeranian Voivodship			
Feature	Pomeranian voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	34,267	35,210	-
Population (persons) on 31 December 2011	2,283,500	38,538,447	5.9
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	27,434	492,646	5.6
Secondary schools graduates (persons) in 2011	24,010	421,724	5.7
Number of employed persons on 31 December 2011	744,321	13,911,203	5.4%
Structure of employed persons in 2011	agriculture 7.5% industry 29.9% services 62.6%	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	4,003.6	61,600.3	6.5
Capital of companies (PLN mln)	11,555.7	188,812.4	6.1
Special economic zones (SEZs) in the voivodship			
<div>- The Pomeranian SEZ, subzones: Chojnice, Człuchów, Gniewino, Krokowa, Sztum, Tczew, Gdańsk (city), Gdynia(city), Kwidzyn(city), Malbork (city), Starogard Gdański (city), Tczew(city);</div> <div>- The Słupsk SEZ, subzones: Debrzno, Słupsk, Żukowo, Słupsk (city)</div>			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)		National economy class C Capital-intensive industry class B Labour-intensive industry class C Trade class C Tourism class B Education class C	
Real investment attractiveness (economic effects evaluation)		National economy class B Industry class B Trade class C Professional science and technical activities class C	
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Gdańsk, Gdańsk (city), Gdynia (city), Słupsk (city), Sopot (city),	
	Class B	Puck	
Gminas**	Class A	Sopot (1), Pruszcz Gdański (1), Tczew (1), Gdańsk (1), Ustka (1), Chojnice (1),	

		Starogard Gdański (1), Krynica Morska (1), Malbork (1), Lębork (1), Gdynia (1), Kwidzyn (1), Słupsk (1), Pruszcz Gdański (2), Wejherowo (1), Puck (1), Kosakowo (2), Kolbudy (2), Rumia (1), Człuchów (1), Władysławowo (1), Jastarnia (1), Reda (1), Łeba (1), Żukowo (3), Kościerzyna (1), Hel (1), Kobylnica (2)
	Class B	Gniewino (2), Bytów (3), Ustka (2), Sztutowo (2), Słupsk (2), Nowy Staw (3), Nowy Dwór Gdański (3), Kościerzyna (2)

In 2009 Pomeranian voivodship made a contribution of 5.7% to the GDP of Poland. . Calculated per capita, it amounted to PLN 34.267 with the average for Poland PLN 35,210. With this result the voivodship occupies the fifth place in the country. The GDP growth rate in the period 2003-2009 amounted to 160.7% while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (62.6%) whereas a share of the agricultural and industrial sectors is respectively 7.5% and 29.9% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 2,283,500 (as of 2011), which makes up 5.9% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 16.5% of the population at pre-reproductive age, 68.1% at reproductive age and 15.5% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 12.1%, compared to 12.4% in Poland¹⁷. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3,691.8, which is 100.1% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 28 higher education institutions in which 104.8 thousand students study, which makes up 6% of all students Poland-wide. Moreover 5.8 % of pupils of secondary schools attend technikum schools and 7.3% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: high-tech industry, logistics, maritime sector, tourism and the manufacture of food.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 3 special economic zone (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Pomorska SSE (Pomeranian special economic zone), subzones: Chojnice, Człuchów, Gniewino, Krokowa, Sztum, Tczew, the city of Gdańsk, the city of Gdynia, the city of Kwidzyn, the city of Malbork, the city of Starogard Gdański, the city of Tczew;
- Słupska SSE (Słupsk special economic zone), subzones: Debrzno, Słupsk, Żukowo, the city of Słupsk.

¹⁷ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

12. The profile of regional economy of Silesian voivodship

Silesian voivodship is one of the most attractiveness voivodships in terms of investment attractiveness. It is confirmed by a high value of GDP generated by the region. It is influenced by a number of factors connected mainly with voivodship's natural resources which determined the economic development of the region.

The main advantages of the voivodship are:

- the voivodship has many mineral resources: the largest coal deposits in Poland, zinc and lead ores, which results in its highly industrial character (the production of energy and metallic products, the extraction of resources). Thanks to it there is the Upper Silesian Industrial Belt in the central part of the voivodship, which is the most industrialised area in Poland. There are also some smaller industrial belts in other larger cities – Częstochowa (the Industrial Belt of Częstochowa), Bielsko-Biała (the Industrial Belt of Bielsko-Biała), Jaworzno (the Jaworznicko-Chrzanowski Industrial Belt),
- a large number of industrial plants among others coal mines, steelworks and power plants. Moreover, there are many other industrial plants in the voivodship which represent both heavy and high-tech industries. Light industry is concentrated mainly near Częstochowa and Lubliniec,
- good connections provided by the Katowice International Airport, A4 highway, E40 road (European route), E75 road (European route) and direct train connection with such cities as Berlin, Vienna, Budapest, Bratislava, Prague, Moscow, Hamburg,
- main courses of study in the voivodship are connected with exact sciences and technical majors (the Częstochowa University of Technology, the Silesian University of Technology), which is mainly determined by the character of region's economy,
- there are broad investment prospects in Silesian voivodship, which is confirmed by very high potential and real investment attractiveness ranks for: national economy, capital-intensive industry, labour-intensive industry, trade, tourism, financial intermediation, business services and education.

Chart 1. General characteristics of the economy of Silesian voivodship

Feature	Silesian voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	37,761	35,210	-
Population (persons) on 31 December 2011	4,626,357	38,538,447	12
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	51,479	492,646	10.4
Secondary schools graduates (persons) in 2011	46,129	421,724	10.9

Number of employed persons on 31 December 2011	1,648,115	13,911,203	11.8
Structure of employed persons in 2011	agriculture 2.8% industry 39.4% services 57.8%	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	5,586	61,600.3	9.1
Capital of companies (PLN mln) in 2010	17,529.2	188,812.4	9.3
Special economic zones (SEZs) in the voivodship			
- The Katowice SEZ, subzones: Czechowice-Dziedzice, Czerwionka-Leszczyny, Godów, Koniecpol, Pawłowice, Radziechowy-Wieprz, Rajcza, Rudziniec, Siewierz, Bielsko-Biała (city), Bieruń (city), Częstochowa (city), Dąbrowa Górnicza (city), Gliwice (city), Jastrzębie-Zdrój (city), Katowice (city), Knurów (city), Lubliniec (city), Rybnik (city), Siemianowice Śląskie (city), Sławków (city), Sosnowiec (city), Tychy (city), Zabrze (city), Zawiercie (city), Żory (city), Orzesze (city).			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)		National economy class A Capital-intensive industry class A Labour-intensive industry class A Trade class A Education class B	
Real investment attractiveness (economic effects evaluation)		National economy class B Industry class A Trade class B Tourism class C Professional science and technology activities class A	
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Katowice (city), Żory (city), Bielsko-Biała (city), Chorzów (city), Jastrzębie-Zdrój (city), Gliwice (city), Tychy (city), Rybnik (city), Zabrze (city), Świętochłowice (city), Siemianowice Śląskie (city), Sosnowiec (city), Ruda Śląska (city), Piekary Śląskie (city), Częstochowa (city), Mysłowice (city)	
	Class B	Dąbrowa Górnicza (City), Bytom (City), Pszczyński, Mikołowski, Jaworzno (City), Bieruńsko-Lędziński, Będziński, Cieszyński	
Gminas**	Class A	Chorzów (1), Goczałkowice-Zdrój (2), Żory (1), Jastrzębie-Zdrój (1), Świętochłowice (1), Bielsko-Biała (1), Mikołów (1), Gliwice (1), Tychy (1), Katowice (1), Czeladź (1), Łaziska Górne (1), Siemianowice Śląskie (1), Radzionków (1), Pawłowice (2), Rybnik (1), Zabrze (1), Będzin (1), Ruda Śląska (1), Ustroń (1), Knurów (1), Sosnowiec (1), Cieszyn (1), Piekary Śląskie (1), Radlin (1), Bytom (1), Racibórz (1), Pszczyna (3), Częstochowa (1), Bestwina (2), Mysłowice (1), Dąbrowa Górnicza (1), Zawiercie (1), Skoczów (3), Żywiec (1), Suszec (2), Ornontowice (2), Pyskowice (1), Jaworzno (1), Bieruń (1), Kozy (2), Sławków (1), Lędziny (1), Wojkowice (1), Wodzisław Śląski (1), Świerklany (2), Wilamowice (3), Wiry (2), Tarnowskie Góry (1), Rydułtowy (1), Olsztyn (2), Miedźna (2), Zebrzydowice (2), Lubliniec (1), Wisła (1), Porąbka (2), Łyski (2), Ożarówice (2), Strumień (3)	
	Class B	Chełm Śląski (2), Czechowice-Dziedzice (3), Psary (2), Jaworze (2), Bobrowniki (2), Rędziny (2), Herby (2), Gierałtowice (2), Czernichów (2), Jasienica (2), Chybie (2), Krupski Młyn (2), Poczesna (2), Wilkowice (2), Imielin (1), Markłowice (2), Miasteczko Śląskie (1), Mszana (2), Kamienica Polska (2), Poraj (2), Mierzęcice (2), Boronów (2), Myszków (1), Pszów (1), Bojszowy (2), Ogrodzieniec (3), Godów (2), Żarki (3), Mstów (2), Świerklaniec (2), Łazy (3),	

		Brenna (2), Szczyrk (1), Buczkowice (2), Łękawica (2), Krzepice (3), Krzanowice (3), Łodygowice (2), Poręba (1), Siewierz (3), Dębowiec (2), Czerwionka-Leszczyny (3), Hażlach (2), Zbroślawice (2), Kobiór (2)
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In 2009 Silesian voivodship made a contribution of 13.1% to the GDP of Poland. . Calculated per capita, it amounted to PLN 37.761 with the average for Poland PLN 35,210. With this result the voivodship occupies the tenth place in the country. The GDP growth rate in the period 2003-2009 amounted to 154.5% while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (57.8%) whereas a share of the agricultural and industrial sectors is respectively 2.8% and 39.4% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 4,626,357 (as of 2011), which makes up 12% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 13.9% of the population at pre-reproductive age, 68.5% at reproductive age and 17.7% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 10.2%, compared to 12.4% in Poland¹⁸. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3.902,8, which is 105.9% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 45 higher education institutions in which 170.2 thousand students study, which makes up 9.8% of all students Poland-wide. Moreover 12.3 % of pupils of secondary schools attend technikum schools and 11% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: the SMEs sector, R&D and the implementation of new technologies, food industry, tourism, the modernisation of traditional sectors (the manufacture of coal, steel and coke).

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

- Katowicka SSE (Katowice special economic zone), subzones: Czechowice-Dziedzice, Czerwionka-Leszczyny, Godów, Koniecpol, Pawłowice, Radziechowy-Wieprz, Rajcza, Rudziniec, Siewierz, the city of Bielsko-Biała, the city of Bieruń, the city of Częstochowa, the city of Dąbrowa Górnicza, the city of Gliwice, the city of Jastrzębie-Zdrój, the city of Katowice, the city of Knurów, the city of Lubliniec, the city of Rybnik, the city of Siemianowice Śląskie, the city of Sławków, the city of Sosnowiec, the city of Tychy, the city of Zabrze, the city of Zawiercie, the city of Żory, the city of Orzesze.

¹⁸ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

13. The profile of regional economy of Świętokrzyskie voivodship

Świętokrzyskie voivodship is situated in the central part of Poland near large urban agglomerations: Cracow, Warsaw and Łódź. Grasslands occupy 650 200 ha (55,6% of the total area), the farming of cattle, horses and poultry prevails. A characteristic element is the Świętokrzyskie Mountains (literally: the Holy Cross Mountains), which lie in the centre of the Kielce Highlands, which in turn influences the development of tourism.

The main advantages of the voivodship are:

- two state universities: the Świętokrzyska University of Technology in Kielce and the Jan Kochanowski University of Humanities and Sciences in Kielce, the part of which is the Faculty of Health Sciences ranked in the highest category 1 by the Ministry of Science and Higher Education,
- favourable conditions for the development of rural tourism, especially agritourism (the Świętokrzyskie Mountains),
- natural resources – deposits of natural resources used in the construction industry (the area of the Świętokrzyskie Mountains), sulphur (near Busko-Zdrój and Grzybów) and mineral waters (Busko-Zdrój, the water called Buskowieńka), sulphuric waters (Busko-Zdrój),
- a high real investment attractiveness rank for industry,
- favourable conditions for the development of food industry,
- rich mineral springs of therapeutical waters and a well-developed base of treatment facilities and sanatoria, recreation establishments, hotels and bed&breakfast,
- the presence of quite well-developed branches of industry – smelting industry represented by Celsa Ostrowiec Steelworks (Ostrowiec Świętokrzyski), the manufacture of metallic products (Skarżysko-Kamienna), the manufacture of machinery and equipment (Starachowice), the manufacture of construction materials (Kielce), the manufacture of ceramics, founding industry (Stąporków, Końskie), power industry (Połaniec).

Chart 1. General characteristics of the economy of Świętokrzyskie voivodship

Feature	Świętokrzyskie voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	27,333	35,210	-
Population (persons) on 30 December 2011	1,278,116	38,538,447	3.3
Human Resources Potential			

Higher education institutions graduates (persons) in 2011	14,144	492,646	2.9
Secondary schools graduates (persons) in 2011	15,827	421,724	3.8
Number of employed persons on 31 December 2011	462,764	13,911,203	3.3%
Structure of employed persons in 2011	agriculture 24.2% industry 29.5% services 46.3%	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	720.4	61,600.3	1.2
Capital of companies (PLN mln) in 2010	2,819.8	188,812.4	1.5
Special economic zones (SEZs) in the voivodship			
- The Tarnobrzeg SEZ, subzones: Połaniec, Staszów, Tuczepy - The Starachowice SEZ, subzones: Końskie, Morawica, Sędziszów, Stąporków, Suchedniów, Ostrowiec Świętokrzyski (city), Skarżysko-Kamienna (city), Starachowice (city), Kielce (city), Piekoszów			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)			
Real investment attractiveness (economic effects evaluation)			
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Kielce (city)	
	Class B		
Gminas**	Class A	Kielce (1), Starachowice (1), Ostrowiec Świętokrzyski (1), Skarżysko-Kamienna (1), Sitkówka-Nowiny (2), Połaniec (3)	
	Class B	Sandomierz (1), Ożarów (3), Strawczyn (2), Zagnańsk (2), Miedziana Góra (2)	

In 2009 Świętokrzyskie voivodship made a contribution of 2.6% to the GDP of Poland. . Calculated per capita, it amounted to PLN 27.333 with the average for Poland PLN 35,210. With this result the voivodship occupies the twelfth place in the country. The GDP growth rate in the period 2003-2009 amounted to 155.9% while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (46,3%) whereas a share of the agricultural and industrial sectors is respectively 24.2% and 29.5% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 1,278,116 (as of 2011), which makes up 3.3% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 14.4% of the population at pre-reproductive age, 67.3% at reproductive age and 18.3% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The

registered unemployment rate in the voivodship in August 2012 was 14.9%, compared to 12.4% in Poland¹⁹. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3,137.3, which is 85.1% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 15 higher education institutions in which 42.3 thousand students study, which makes up 2.4% of all students Poland-wide. Moreover 4.1 % of pupils of secondary schools attend technikum schools and 3.1% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: the manufacture of electrical machinery, automobile industry, metallurgy, electronics, precision mechanics, food industry, the manufacture of construction materials, construction and the extraction of mineral resources.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 2 special economic zones (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Tarnobrzaska SSE (Tarnobrzeg special economic zone), subzones: Połaniec. Staszów, Tuczępy,
- Starachowicka SSE (Starachowice special economic zone), subzones: Końskie, Morawica, Sędziszów, Stąporków, Suchedniów, the city of Ostrowiec Świętokrzyski, the city of Skarżysko-Kamienna, the city of Starachowice, the city of Kielce, the city of Piekoszów.

¹⁹ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

14. The profile of regional economy of Warmian-Masurian voivodship

Warmian-Masurian voivodship is situated in the north-eastern part of Poland and as the only voivodship it borders on the Kaliningrad Oblast (the Russian Federation), which gives huge opportunities of cooperation with the markets of Eastern Europe, including Russia. In the voivodship there are also huge opportunities of developing the manufacture of high-quality food, which is determined by the favourable structure of farm size and the presence of unoccupied production space in agriculture.

The main advantages of the voivodship are:

- favourable natural conditions (lake districts, forests) for the development of tourism, agritourism as well as 'clean' (green) industry using renewable energy,
- the A1 and Via Baltica routes (planned) give opportunities to develop very good connections in the future,
- in the voivodship there is a sea port in Elbląg, which is located on the Vistula lagoon. Currently a project of building a shipping canal through the Vistula Spit with the cooperation with the Ukraine, which additionally raises the advantages of the region in terms of transport,
- there are high ranked scientific establishments and courses of study connected with agriculture and food processing: the Institute of Animal Reproduction and Food Research of the Polish Academy of Sciences in Olsztyn and Warmian-Masurian University in Olsztyn: the Faculty of Animal Bioengineering, the Faculty of Environmental Protection and Fishery, the Faculty of Veterinary Medicine, the Faculty of Environmental Management and Agriculture, the Faculty of Food Sciences,
- the voivodship's largest cities are Olsztyn and Elbląg. Olsztyn is the main centre of food industry, the manufacture of tyres, timber industry and tourism. Elbląg is an important centre of heavy industry and tourism. It is also a sea port,
- the voivodship was ranked high in terms of real investment attractiveness for the national economy and tourism.

Additional information

Chart 1. General characteristics of the economy of Warmian-Masurian voivodship

Feature	Warmian-Masurian voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	25,970	35,210	-
Population (persons) on 30 December 2011	1,452,596	38,538,447	3.8
Human Resources Potential			

Higher education institutions graduates (persons) in 2011	14,551	492,646	3.0
Secondary schools graduates (persons) in 2011	16,226	421,724	3.8
Number of employed persons on 31 December 2011	422,880	13,911,203	3.0%
Structure of employed persons in 2011	agriculture 11.1% industry 32.4% services 56.5%	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	290.3	61,600.3	0.5
Capital of companies (PLN mln) in 2010	1,553.9	188,812.4	0.8
Special economic zones (SEZs) in the voivodship			
<div>- The Warmian-Masurian SEZ, subzones: Barczewo, Bartoszyce, Dobrze Miasto, Iłowo-Osada, Morąg, Nidzica, Olecko, Olsztynek, Orzysz, Pasłęk, Piecki, Pisz, Szczytno, Wielbark, Bartoszyce (city), Elbląg (city), Iława (city), Lidzbark Warmiński (city), Mrągowo (city), Nowe Miasto Lubawskie (city), Olsztyn (city), Ostróda (city).</div> <div>- The Suwałki SEZ, subzones: Elk (city), Gołdap.</div>			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)		Tourism class C	
Real investment attractiveness (economic effects evaluation)		Tourism class B	
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Elbląg (city), Olsztyn (city)	
	Class B		
Gminas**	Class A	Działdowo (1), Kętrzyn (1), Ostróda (1), Szczytno (1), Iława (1), Bartoszyce (1), Olsztyn (1), Mrągowo (1), Elk (1), Giżycko (1), Górowo Iławeckie (1), Elbląg (1), Lidzbark Warmiński (1), Stawiguda (2), Lubawa (1)	
	Class B	Mikołajki (3), Gołdap (3), Nowe Miasto Lubawskie (1), Braniewo (1), Biskupiec (3), Węgorzewo (3), Dywity (2), Olecko (3), Jonkowo (2)	

In 2009 Warmian - Mazurian voivodship made a contribution of 2.8% to the GDP of Poland. . Calculated per capita, it amounted to PLN 25.970 with the average for Poland PLN 35,210. With this result the voivodship occupies the tenth place in the country. The GDP growth rate in the period 2003-2009 amounted to 149.1% while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (56.5%) whereas a share of the agricultural and industrial sectors is respectively 11.1% and 32.4% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 1,452,596 (as of 2011), which makes up 3.8% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 16.1% of the population at pre-reproductive age, 69.1% at reproductive age and 14.8% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 19.3%, compared to 12.4% in Poland²⁰. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 2,967.9, which is 80.5% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 9 higher education institutions in which 46.7 thousand students study, which makes up 2.7% of all students Poland-wide. Moreover 4.0 % of pupils of secondary schools attend technikum schools and 4.4% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: food industry, the manufacture of furniture, tourism, the manufacture of sports equipment, the manufacture of rubber products.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 2 special economic zones (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Warmińsko – Mazurska SSE (Warmian-Masurian special economic zone), subzones: Barczewo, Bartoszyce, Dobre Miasto, Iłowo-Osada, Morąg, Nidzica, Olecko, Olsztynek, Orzysz, Pasłęk, Piecki, Pisz, Szczytno, Wielbark, the city of Bartoszyce, the city of Elbląg, the city of Iława, the city of Lidzbark Warmiński, the city of Mrągowo, the city of Nowe Miasto Lubawskie, the city of Olsztyn, the city of Ostróda,
- Suwalska SSE (Suwałki special economic zone), subzones: the city of Ełk, Gołdap.

²⁰ The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

15. The profile of regional economy of Greater Poland voivodship

Greater Poland voivodship is one of the economically best-developed voivodships of Poland. It is characterised by a high concentration of foreign capital invested in Poland and high investment outlays per capita.

The main advantages of the voivodship are:

- its balanced economic development with a high degree of industrialisation and a high level of technology,
- the high potential of human resources is shaped by the presence of the best universities in Poland (ranked in the category 1 by the Ministry of Science and Technology): the Poznań University of Technology, the Poznań University of Economics, Poznań Medical Univeristy, the Poznań University of Life Sciences,
- good transport connections among others through A2 highway, which connects Western Europe with Russia and Eastern countries, as well as good plane connections (a domestic and international airport) and water connections (the Oder waterway),
- Poznań is one of Poland's oldest and largest cities, it is a historical capital of the region of Greater Poland and a important centre of industry, trade, culture, higher education and research, it also belongs to the leading Polish cities in economic terms,
- the voivodship was ranked high in terms of potential investment attractiveness for almost every section of economy: industry, trade, tourism, financial intermediation, business services and education,
- the voivodship was ranked high in terms of real investment attractiveness for national economy, industry and trade.

Additional information**Chart 1. General characteristics of the economy of Greater Poland voivodship**

Feature	Greater Poland voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	37,424	35,210	-
Population (persons) on 31 December 2011	3,455,477	38,538,447	9
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	46,232	492,646	9.4
Secondary schools graduates (persons) in 2011	40,426	421,724	9.6
Number of employed persons on 31 December 2011	1,350,237	13,911,203	9.7%
Structure of employed persons in 2011	agriculture 13.8% industry 34% services 52.2%	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	6,155.5	61,600.3	10
Capital of companies (PLN mln) in 2010	15,524.2	18,8812.4	8,2
Special economic zones (SEZs) in the voivodship			
<ul style="list-style-type: none"> - The Kostrzyn-Słubice SEZ, subzones: Buk, Chodzież, Krobia, Nowy Tomyśl, Przemęt, Stęszew, Swarzędz, Wronki, Poznań(city), - The Wałbrzych SEZ, subzones: Jarocin, Kościan, Krotoszyn, Rawicz, Śrem, Września, Kalisz (city), Leszno (city), - The Łódź SEZ, subzones: Nowe Skalmierzyce, Opatówek, Ostreszów, Przykona, Słupca, Koło (city), Turek (city), - The Kamienna Góra SEZ, subzone: Ostrów Wlkp.(city) - The Słupsk SEZ, subzone: Rogoźno, - The Pomeranian SEZ, subzone: Piła (city) 			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)	National economy class C Capital-intensive industry class C Labour-intensive industry class C Trade class B Tourism class C Education class C		
Real investment attractiveness (economic effects evaluation)	National economy class C Industry class C Trade class B		

		Tourism class C Professional science and technical activities class C
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy		
Poviats	Class A	Poznań (city), Leszno (city), Konin (city), Kalisz (city), Poznań
	Class B	
Gminas**	Class A	Tarnowo Podgórne (2), Kościan (1), Leszno (1), Turek (1), Suchy Las (2), Czarnków (1), Poznań (1), Chodzież (1), Konin (1), Piła (1), Komorniki (2), Luboń (1), Ostrów Wielkopolski (1), Wągrowiec (1), Gniezno (1), Puszczykowo (1), Kalisz (1), Dopiewo (2), Swarzędz (3), Słupca (1), Kórnik (3), Złotów (1), Koło (1), Czerwonak (2), Kleszczewo (2), Kępno (3), Śrem (3), Rokietnica (2), Przykona (2), Kleczew (3), Buk (3), Środa Wielkopolska (3), Gostyń (3)
	Class B	Ostrzeszów (3), Nowy Tomyśl (3), Pobiedziska (3), Grodzisk Wielkopolski (3), Mosina (3), Jarocin (3), Międzychód (3), Murowana Goślina (3), Rawicz (3), Margonin (3), Oborniki (3), Wolsztyn (3), Baranów (2), Łubowo (2), Krotoszyn (3), Stęszew (3), Kostrzyn (3), Szamotuły (3), Pniewy (3), Chodzież (2), Pakosław (2), Kościan (2)

In 2009 Greater Poland voivodship made a contribution of 9.5% to the GDP of Poland. . Calculated per capita, it amounted to PLN 37.424 with the average for Poland PLN 35,210. With this result the voivodship occupies the fourth place in the country. The GDP growth rate in the period 2003-2007 amounted to 164,1%, while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (52.2%) whereas a share of the agricultural and industrial sectors is respectively 13.8% and 34% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 3,455,477 (as of 2011), which makes up 9% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 16.1% of the population at pre-reproductive age, 68.6% at reproductive age and 15.3% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 9.1%, compared to 12.4% in Poland²¹. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3,368.9, which is 91.4% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 40 higher education institutions in which 159.7 thousand students study, which makes up 9.2% of all students Poland-wide. Moreover 9.5 % of pupils of secondary schools attend technikum schools and 11.7% vocational schools.

The regional development strategy of Greater Poland voivodship till 2020 does not mention strategic sectors but suggests creating favourable conditions for the functioning of companies (branches, sectors) or instruments of support. The strategy does not describe market behaviours of business subjects nor it formulates goals whose accomplishment requires macroeconomic solutions, legislative or fiscal changes, nor mentions goals and tasks in the fields which cannot be subject to successful public intervention. It refers particularly to industrial sectors and branches.

²¹ 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 5 special economic zones (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Kostrzyńsko-Słubicka SSE (Kostrzyn-Słubice special economic zone), subzones: Buk, Chodzież, Krobia, Nowy Tomyśl, Przemęt, Stęszew, Swarzędz, Wronki, the city of Poznań,
- Wałbrzyska SSE (Wałbrzych special economic zone), subzones: Jarocin, Kościan, Krotoszyn, Rawicz, Śrem, Września, the city of Kalisz, the city of Leszno,
- Łódzka SSE (Łódź special economic zone), subzones: Nowe Skalmierzyce, Opatówek, Ostrzeszów, Przykona, Słupca, the city of Koło, the city of Turek,
- Kamiennogórska SSE (Kamienna Góra special economic zone), subzone: the city of Ostrów Wlkp,
- Słupska SSE (Słupsk special economic zone), subzone: Rogoźno,
- Pomorska SSE (Pomeranian special economic zone), subzone: the city of Piła.

16. The profile of regional economy of Western Pomeranian voivodship

Western Pomeranian voivodship is characterised by a very good location in view of European markets and Baltic sea countries. Szczecin, the largest city in the voivodship, attracts the highest values of economic potential in the voivodship and has very good transport connections with European highways and seaways.

The main advantages of the voivodship are:

- an exceptional location which gives an opportunity to use a wide range of means of transport (water, rail, air and road transport) in the business activity,
- the voivodship has rich traditions connected with maritime economy (the manufacture of vessels, fisher, coastal tourism),
- more than a half of the area of the voivodship is farmland, which gives a chance of investments in and development of agriculture and food industry,
- favourable natural conditions of the development of tourism (Baltic Sea, Wałęckie and Drawskie Lake Districts),
- potential investment attractiveness shows particular advantages for investment in tourism, mainly in voivodship's coastal area and Drawskie and Wałęckie Lake Districts,
- huge possibilities of renewable energy production (energy plants, wind farms) , which combined with the development of tourism means that Western Pomeranian voivodship may become a symbol of sustainable development with the use of modern technologies supporting regional economy.

Chart 1. General characteristics of the economy of Western Pomeranian voivodship

Feature	Western Pomeranian voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	30,939	35,210	-
Population (persons) on 31 December 2011	1,722,739	38,538,447	4.5
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	18,754	492,646	3.8
Secondary schools graduates (persons) in 2011	16,687	421,724	4.0
Number of employed persons on 31 December 2011	511,273	13,911,203	3.7%

Structure of employed persons in 2011	agriculture 7.5% industry 30.6% services 61.9%	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	1,625.2	61,600.3	2.6
Capital of companies (PLN mln) in 2010	4,617.8	188,812.4	2.4
Special economic zones (SEZs) in the voivodship			
<div>- The Kostrzyn-Słubice SEZ, subzones: Barlinek, Goleniów, Gryfino, Karlino, Police, Łobez, Białogard (city)</div> <div>- The Mielec SEZ, subzone: Szczecin (city)</div> <div>- The Pomeranian SEZ, subzone: Stargard Szczeciński (city)</div> <div>- The Słupsk SEZ, suczones.: Koszalin (city), Szczecinek (city), Wałcz (city)</div>			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)		Tourism class A	
Real investment attractiveness (economic effects evaluation)		National economy class C Professional science and technological activities class C	
Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy			
Poviats	Class A	Koszalin (city), Szczecin (city), Police	
	Class B	Kołobrzeg, Świnoujście (city)	
Gminas**	Class A	Rewal (2), Kołobrzeg (1), Police (3), Dobra (Szczecińska) (2), Darłowo (1), Szczecin (1), Koszalin (1), Kołobrzeg (2), Międzyzdroje (3), Stargard Szczeciński (1), Świdwin (1), Szczecinek (1), Stepnica (2), Dziwnów (3), Świnoujście (1), Ustronie Morskie (2), Wałcz (1), Białogard (1), Mielno (2), Sławno (1), Gryfino (3), Drawsko Pomorskie (3), Goleniów (3), Nowogard (3), Nowe Warpno (3), Kołbaskowo (2), Dębno (3)	
	Class B	Złocieniec (3), Trzebiatów (3), Kobyłanka (2), Barlinek (3), Kalisz Pomorski (3), Karlino (3), Kamień Pomorski (3), Choszczno (3), Sianów (3), Biesiekierz (2)	

In 2009 Western Pomeranian voivodship made a contribution of 3.9% to the GDP of Poland. . Calculated per capita, it amounted to PLN 30,939 with the average for Poland PLN 35,210. With this result the voivodship occupies the seventh place in the country. The GDP growth rate in the period 2003-2009 amounted to 147.7%, while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (61.9%) whereas a share of the agricultural and industrial sectors is respectively 7.5% and 30.6% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 1,722,739 (as of 2011), which makes up 4.5% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 15.8% of the population at pre-reproductive age, 69.3% at reproductive age and 16.0% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The

registered unemployment rate in the voivodship in August 2012 was 16.5%, compared to 12.4% in Poland²². The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3,278.2, which is 88.9% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 22 higher education institutions in which 67.5 thousand students study, which makes up 3.9% of all students Poland-wide. Moreover 4.0 % of pupils of secondary schools attend technikum schools and 4.4% vocational schools.

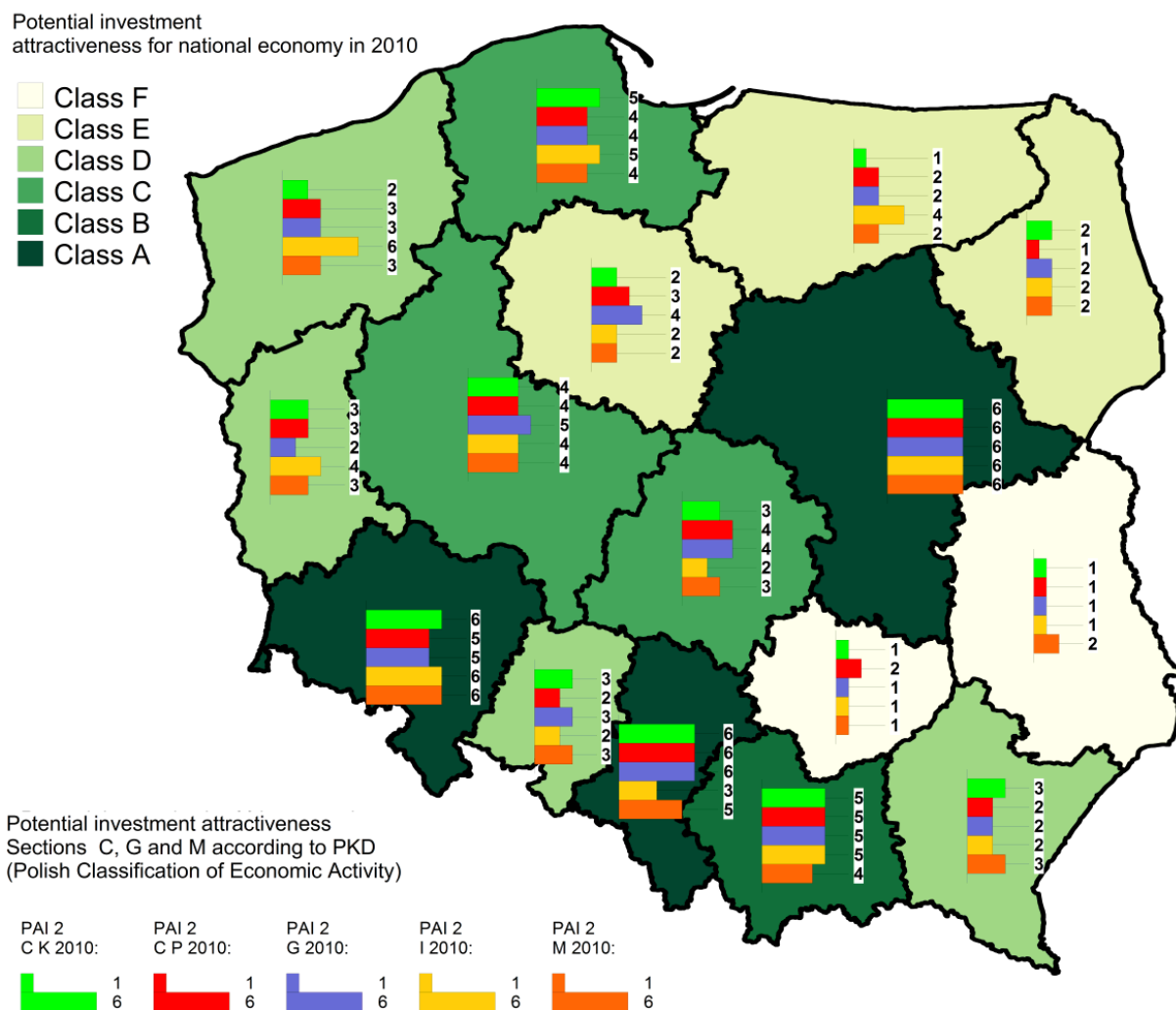
The voivodship's strategic sectors mentioned in the strategy of regional development include above all: maritime economy, industry, tourism, well-developed commercial and virtual services, computer industry, telecommunications, IT services, biotechnology, genetic technologies, consulting services, knowledge services and the development of telemetry.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 3 special economic zones (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Kostrzyńsko – Słubicka (Kostrzyn-Słubice special economic zone), subzones: Barlinek, Goleniów, Gryfino, Karlino, Police, Łobez, the city of Białogard,
- Mielecka SSE (Mielec special economic zone), subzone: the city of Szczecin,
- Pomorska SSE (Pomeranian special economic zone), subzone: the city of Stargard Szczeciński,
- Słupska SSE (Słupsk special economic zone), subzone: the city of Koszalin, the city of Szczecinek, the city of Wałecz.

²² The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

APPENDIX

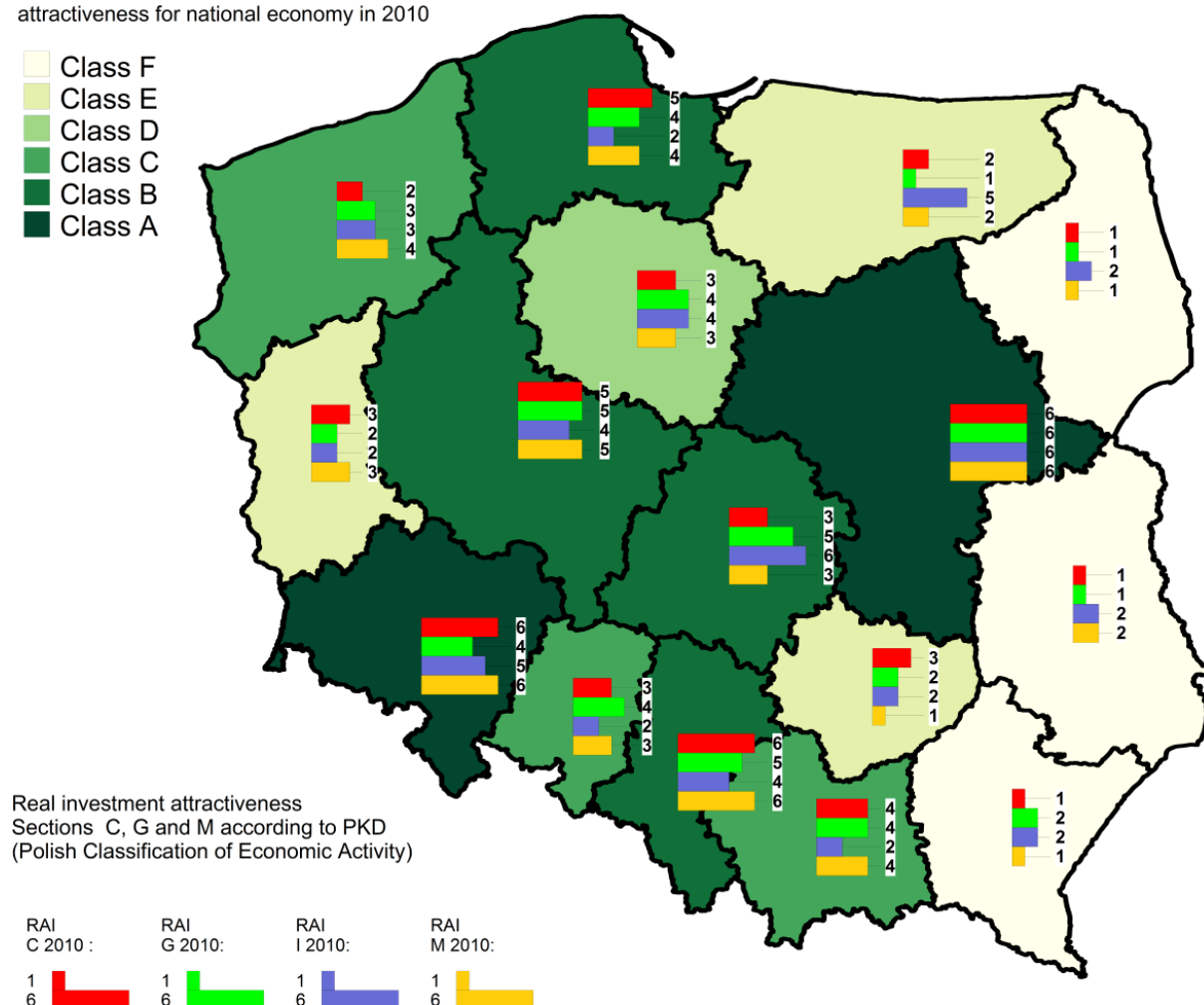
Exhibit 1. Potential investment attractiveness of Polish voivodship broken down by basic sections of the national economy

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



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

Exhibit 3. Gold at a rate of fifty counties PAI1 GN

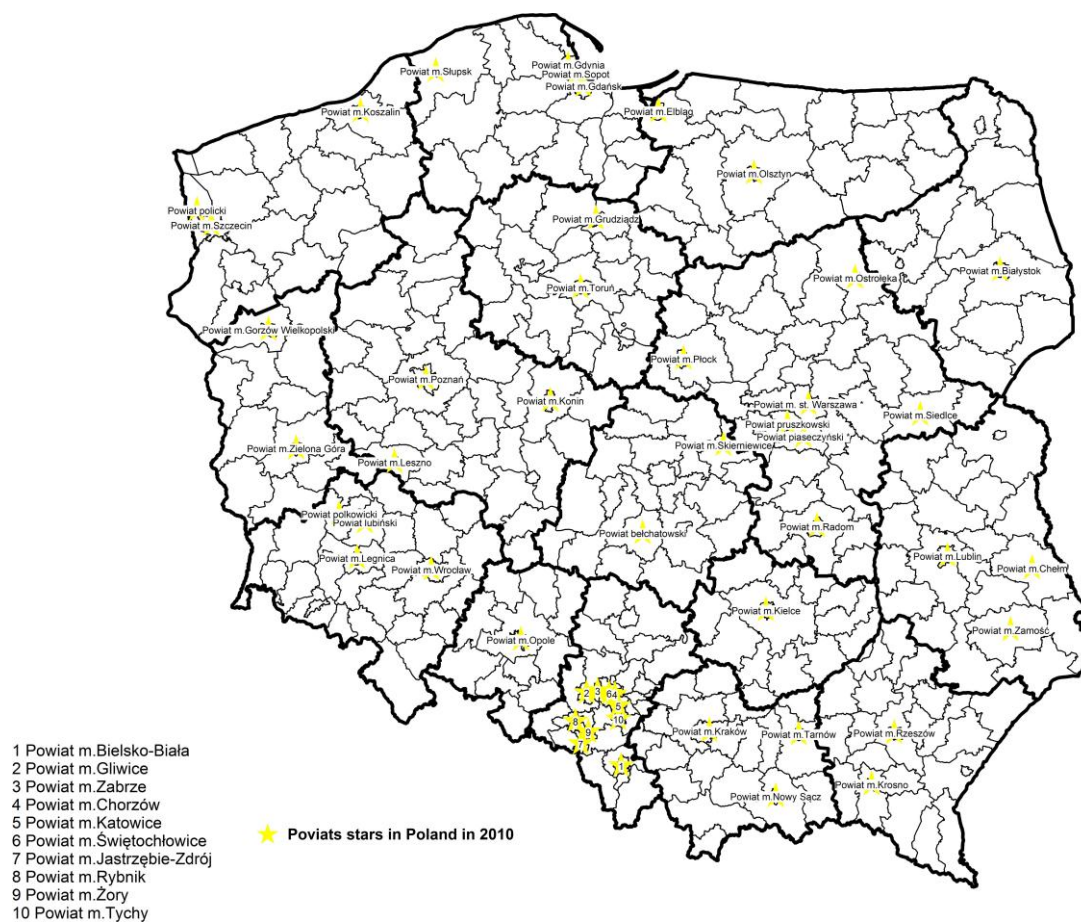


Exhibit 4. Gold hundred gminas in 2010

