CENTRE FOR REGIONAL AND
LOCAL ANALYSES

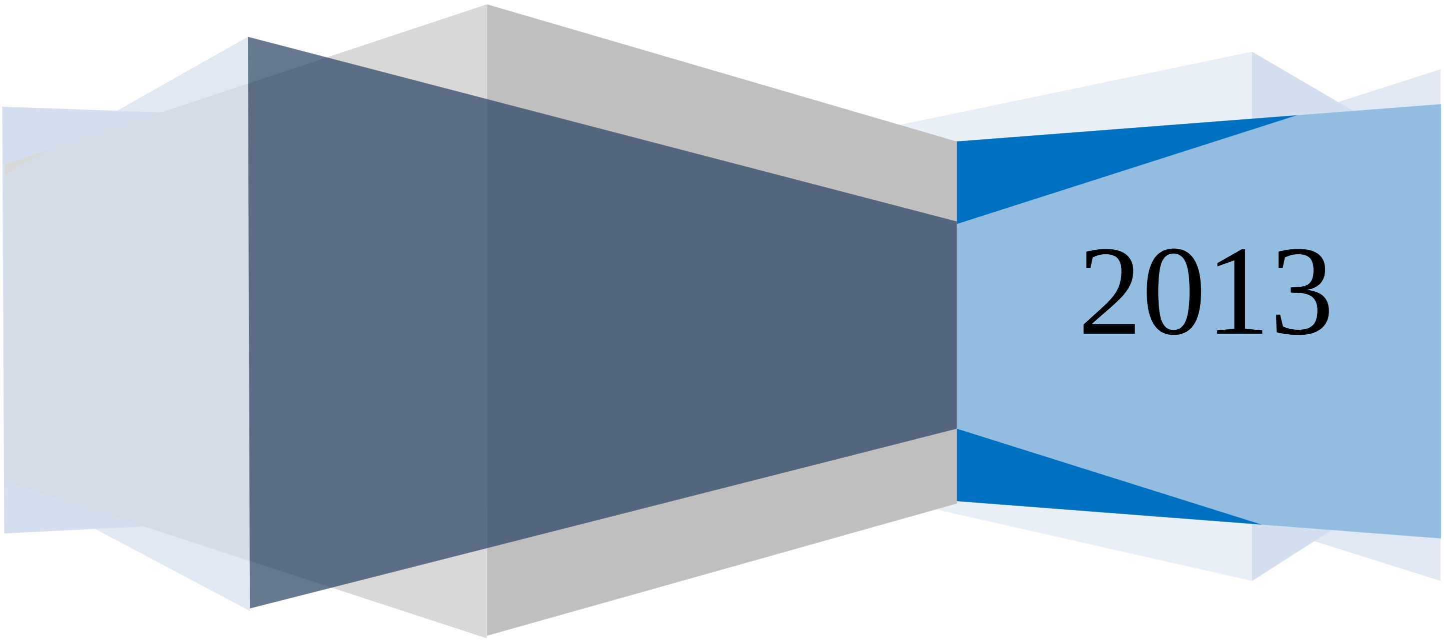
REGIONAL INVESTMENT ATTRACTIVENESS 2013 POLAND

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.



Warsaw, November 2013

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 (WSE), under the supervision of H. Godlewska-Majkowska, Ph.D., university professor at the WSE. All the Authors are the core members of a team that develops methodology of calculating regional investment attractiveness in order that characteristics of regions, which are important to investors, 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 (communes – Polish: *gmina*, counties – Polish: *powiat*, 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 calculated only for the voidoships, on the basis of characteristics available only on the regional or macroregional level which allows evaluating 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, ranks of real investment attractiveness, 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 made, are used in this report.

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 organizations of entrepreneurs. A description of methodological approach to measuring investment attractiveness of Polish regions, counties and communes can be found online on the website 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 (roads, railways, waterways, airways) and communications/telecomputer 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 establishments[1],
- rich cultural heritage (numerous monuments among which UNESCO World Heritage Sites: The Centennial Hall in Wrocław and the Churches of Peace in Świdnica and Jawor should be noted) 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 specialization 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), Wroclaw University of Environmental and Life Sciences (Faculty of Food Science, Faculty of Veterinary Medicine, Faculty of Biology and Animal Science) and Ludwik Hirszfeld Institute of Immunology and Experimental Therapy in Wrocław.

The general characteristics of the Lower Silesian voivodship are presented in Table 1.

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

Feature	Lower Silesian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	41,750	37,096	-
Population (persons) on 31 December 2012	2,914,362	38,533,299	7.6
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	41,350	484,999	8.5
Secondary schools graduates (persons) in 2012	26,844	421,317	6.4
Number of employed persons on 31 December 2012	1,011,328	1,391,1203	7.3
Structure of employed persons 2012	agriculture 8.7% industry 31.7% services 59.6%	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	5,759.6	73,704.4	7.8
Capital of companies (PLN m) in 2011	16,608.6	194,160.6	8.6
Special economic zones (SEZs) in the voivodship*			
– Kamienna Góra SEZ, subzones in: gm. Dobroszyce, gm. Gryfów Śląski, gm. Janowice Wielkie, gm. Kamienna Góra, gm. Lubawka, gm. Nowogrodziec, gm. Prusice, gm. Żmigród, m. Jawor, m. Jelenia Góra, m. Kamienna Góra, m. Lubań, m. Piechowice, m. Zgorzelec – Legnica SEZ, subzones in: gm. Chojnów, gm. Gromadka, gm. Legnickie Pole, gm. Miękinia, gm. Polkowice, gm. Prochowice, gm. Przemków, gm. Środa Śląska, m. Chojnów, m. Głogów, m. Legnica, m. Lubin, m. Złotoryja – Tarnobrzeg SEZ, subzone in: gm. Kobierzyce – Wałbrzych SEZ, subzones in: gm. Brzeg Dolny, gm. Bystrzyca Kłodzka, gm. Długołęka, gm. Góra, gm. Jelcz-Laskowice, gm. Kłodzko, gm. Kobierzyce, gm. Nowa Ruda, gm. Oława, gm. Strzegom, gm. Strzelin, gm. Syców, gm. Świdnica, gm. Twardogóra, gm. Wiązów, gm. Wołów, gm. Ząbkowice Śląskie, gm. Żarów, m. Bielawa, m. Bolesławiec, m. Dzierżoniów, m. Kłodzko, m. Kudowa-Zdrój, m. Nowa Ruda, m. Oleśnica, m. Oława, m. Piława Górna, m. Świdnica, m. Świebodzice, m. Wałbrzych, m. Wrocław			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	National economy class A Capital-intensive industry class A Labour-intensive industry class B Trade class A Tourism class A		

	Education class A
Real investment attractiveness RAI	National economy class A Industry class A Trade class C Tourism class C Science and technical professional activity class A

Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)		
Counties	Class A	Lubin, Polkowice, city of Legnica, Wrocław, city of Wrocław
	Class B	Zgorzelec, Jelenia Góra, Głogów, Świdnica, Wołów
Communes	Class A	Bolesławiec (1), Warta Bolesławiecka (2), Jawor (1), Karpacz (1), Kowary (1), Piechowice (1), Kamienna Góra (1), Lubań (1), Świeradów-Zdrój (1), Zawidów (1), Zgorzelec (1), Bogatynia (3), Złotoryja (1), Jelenia Góra (1), Głogów (1), Jerzmanowa (2), Chojnów (1), Lubin (1), Lubin (2), Rudna (2), Grębocice (2), Polkowice (3), Legnica (1), Bielawa (1), Dzierżoniów (1), Piława Górna (1), Duszniki-Zdrój (1), Kłodzko (1), Kudowa-Zdrój (1), Nowa Ruda (1), Polanica-Zdrój (1), Radków (3), Stronie Śląskie (3), Szczytna (3), Świdnica (1), Świebodzice (1), Strzegom (3), Żarów (3), Boguszów-Gorce (1), Szczawno-Zdrój (1), Wałbrzych (1), Oleśnica (1), Oława (1), Strzelin (3), Oborniki Śląskie (3), Brzeg Dolny (3), Czernica (2), Długołęka (2), Kąty Wrocławskie (3), Kobierzyce (2), Siechnice (3), Wrocław (1),
	Class B	Bolesławiec (2), Szklarska Poręba (1), Podgórzyn (2), Lubawka (3), Siekierczyn (2), Pieńsk (3), Góra (3), Kunice (2), Prochowice (3), Chocianów (3), Radwanice (2), Lądek-Zdrój (3), Jedlina-Zdrój (1), Ząbkowice Śląskie (3), Krośnice (2), Syców (3), Jelcz-Laskowice (3), Środa Śląska (3), Trzebnica (3), Wisznia Mała (2), Wołów (3), Sobótka (3),

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Lower Silesian voivodship made a contribution of 8.5 % to the GDP of Poland. Calculated per capita, it amounted to PLN 41,750 with the average for Poland PLN 37,096. With this result the voivodship takes the second place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 184.2% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (59.6%) whereas a share of the agricultural and industrial sectors are respectively 8.7% and 31.7% (In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (54.1%) whereas a share of the agricultural and industrial sectors are respectively 15.7% and 30.2% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 2,914,362 (as of 2013), which is 7.6% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 14.0% of the population at pre-productive age, 64.8% at productive age and 18.2% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 12.9% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3678.7, which is 97.6% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 38 higher education institutions in which there are 155 thousand students studying, which makes up 9.2% of all students in Poland. Moreover, 6.9% of the secondary school students in the voivodship attend vocational schools and 7% attend technical schools.

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

Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following special economic zones:

- Kamienna Góra SEZ, subzones in: gm. Dobroszyce, gm. Gryfów Śląski, gm. Janowice Wielkie, gm. Kamienna Góra, gm. Lubawka, gm. Nowogrodziec, gm. Prusice, gm. Żmigród, m. Jawor, m. Jelenia Góra, m. Kamienna Góra, m. Lubań, m. Piechowice, m. Zgorzelec,
- Legnica SEZ, subzones in: gm. Chojnów, gm. Gromadka, gm. Legnickie Pole, gm. Miękinia, gm. Polkowice, gm. Prochowice, gm. Przemków, gm. Środa Śląska, m. Chojnów, m. Głogów, m. Legnica, m. Lubin, m. Złotoryja,
- Tarnobrzeg SEZ, subzone: gm. Kobierzyce,
- Wałbrzych SEZ, subzones in: gm. Brzeg Dolny, gm. Bystrzyca Kłodzka, gm. Długołęka, gm. Góra, gm. Jelcz-Laskowice, gm. Kłodzko, gm. Kobierzyce, gm. Nowa Ruda, gm. Oława, gm. Strzegom, gm. Strzelin, gm. Syców, gm. Świdnica, gm. Twardogóra, gm. Wiązów, gm. Wołów, gm. Ząbkowice Śląskie, gm. Żarów, m. Bielawa, m. Bolesławiec, m. Dzierżoniów, m. Kłodzko, m. Kudowa-Zdrój, m. Nowa Ruda, m. Oleśnica, m. Oława, m. Piława Górna, m. Świdnica, m. Świebodzice, m. Wałbrzych, m. Wrocław.

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 education system adjusted to the region's needs it 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 abroad,
- a good access to social infrastructure including in particular medical units, sanatoria and health resorts,
- good research and development facilities[2],
- cultural wealth (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 salt springs) set the foundations for the development of tourism 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 specializing 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.

The general characteristics of the Kuyavian-Pomeranian voivodship are presented in Table 1.

[2] In 2010 the Ministry of Science and Higher Education 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 Śniadecki University of Technologies and Life Sciences in Bydgoszcz.

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

<table>
<tr><th colspan="2">Feature</th><th>Kuyavian-Pomeranian voivodship</th><th>Poland</th><th>Share [%]</th></tr>
<tr><td colspan="5">Market Potential</td></tr>
<tr><td colspan="2">GDP per capita 2010 (PLN/person)</td><td>31,107</td><td>37,096</td><td>-</td></tr>
<tr><td colspan="2">Population (persons) on 31 December 2012</td><td>2,096,404</td><td>38,533,299</td><td>5.4</td></tr>
<tr><td colspan="5">Human Resources Potential</td></tr>
<tr><td colspan="2">Higher education institutions graduates (persons) in 2012</td><td>23,348</td><td>484,999</td><td>4.8</td></tr>
<tr><td colspan="2">Secondary schools graduates (persons) in 2012</td><td>22,937</td><td>421,317</td><td>5.4</td></tr>
<tr><td colspan="2">Number of employed persons on 31 December 2012</td><td>683,549</td><td>13,911,203</td><td>4.9</td></tr>
<tr><td colspan="2">Structure of employed persons in 2012</td><td>agriculture 15.7%
industry 30.2%
services 54.1%</td><td colspan="2">agriculture 17.1%
industry 27.4%
services 55.5%</td></tr>
<tr><td colspan="5">Investment outlays and capital of companies with foreign capital participation in the voivodship</td></tr>
<tr><td colspan="2">Investment outlays (PLN m) in 2011</td><td>711.4</td><td>73,704.4</td><td>1.0</td></tr>
<tr><td colspan="2">Capital of companies (PLN m) in 2011</td><td>3,223.7</td><td>194,160.6</td><td>1.7</td></tr>
<tr><td colspan="5">Special economic zones (SEZs) in the voivodship*</td></tr>
<tr><td colspan="5">– SSE Pomorska, podstrefa: gm. Barcin, gm. Kowalewo Pomorskie, gm. Łysomice, gm. Świecie, gm. Wąbrzeźno, m. Bydgoszcz, m. Grudziądz, m. Rypin, m. Toruń</td></tr>
<tr><td colspan="5">Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)</td></tr>
<tr><td colspan="2">Potential investment attractiveness PAI_2</td><td colspan="3"></td></tr>
<tr><td colspan="2">Real investment attractiveness RAI</td><td colspan="3">Trade class C
Tourism class C</td></tr>
<tr><td colspan="5">Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)</td></tr>
<tr><td rowspan="2">Counties</td><td>Class A</td><td colspan="3">Bydgoszcz, Toruń, Grudziądz, Włocławek</td></tr>
<tr><td>Class B</td><td colspan="3"></td></tr>
<tr><td rowspan="2">Communes</td><td>Class A</td><td colspan="3">Osielsko (2), Solec Kujawski (3), Chełmża (1), Bydgoszcz (1), Toruń (1), Brodnica (1), Chełmno (1), Golub-Dobrzyń (1), Świecie (3), Wąbrzeźno (1), Grudziądz (1), Ciechocinek (1), Inowrocław (1), Włocławek (1)</td></tr>
<tr><td>Class B</td><td colspan="3">Białe Błota (2), Wielka Nieszawka (2), Aleksandrów Kujawski (1), Janikowo (3), Nakło nad Notecią (3), Radziejów (1), Rypin (1), Kowal (1), Barcin (3)</td></tr>
</table>

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2009 Kuyavian-Pomeranian voivodship made a contribution of 4.5% to the GDP of Poland. Calculated per capita, it amounted to PLN 31,107 compared to the average for Poland of PLN 37,096. With this result the voivodship takes the tenth place in the country. The GDP growth rate in the years 2003-2010 amounted to 157.5% while the national average amounted to 168.0%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (54.1%) whereas a share of the agricultural and industrial sectors are respectively 15.7% and 30.2% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 2,096,404 (as of 2013), which makes up 5.4% of the population of Poland. The age structure of Kuyavian-Pomeranian voivodship in 2012 was as follows: 18.8% of the population at pre-productive age 18,8% 64.1% at productive age and 17.1% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 17.5% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3209.6, which is 85.1% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 21 higher education institutions in which there are 77 thousand students studying, which makes up 4.6% of all students in Poland. Moreover, 7% of the secondary school students in the voivodship attend vocational schools and 5.9% attend technical schools.

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

Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following special economic zones:

- Pomeranian SEZ (*Pomorska Specjalna Strefa Ekonomiczna)*, subzones in: gm. Barcin, gm. Kowalewo Pomorskie, gm. Łysomice, gm. Świecie, gm. Wąbrzeźno, m. Bydgoszcz, m. Grudziądz, m. Rypin, m. Toruń.

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 conditions for the development of food industry because of the agricultural character of the most part of the voivodship and very high specialisation in cultivation of industrial plants, fruit and vegetables. The cleanness of natural environment, multiculturalism and tourist values (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 Ukraine and Belarus,
- relatively low labour costs (wages and salaries 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,
- big 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 among 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,
- predestination to the development of BPO by virtue of access to well-qualified human resources and their low wage expectations.

The general characteristics of the voivodship are presented in Table 1.

Table 1. General characteristics of the economy of Lublin voivodship

Feature	Lublin voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	25,079	37,096	-
Population (persons) on 31 December 2012	2,165,651	38,533,299	5.6
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	28,455	484,999	5.9
Secondary schools graduates (persons) in 2012	27,798	421,317	6.6
Number of employed persons on 31 December 2012	803,560	13,911,203	5.8

Structure of employed persons 2012	agriculture 38.3% industry 17.9% services 43.8%		agriculture 17.1% industry 27.4% services 55.5%
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	587.2	73,704.4	0.8%
Capital of companies (PLN m) in 2011	1503.9	194,160.6	0.8%
Special economic zones (SEZs) in the voivodship*			
– Mielec SEZ, subzones in: m. Lubartów, m. Lublin, m. Radzyń Podlaski, m. Zamość – Starachowice SEZ subzones in: m. Puławy – Tarnobrzeg SEZ subzones in: gm. Horodło, gm. Janów Lubelski, gm. Łuków, gm. Poniatowa, gm. Ryki, gm. Tomaszów Lubelski, m. Kraśnik, m. Tomaszów Lubelski, m. Łuków			
Distinguishing investment attractiveness ratings PAI _2 and RAI (Class A, B and C)			
Potential investment attractiveness PAI_2			
Real investment attractiveness RAI			
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	Biała Podlaska, Chełm, Zamość, Lublin	
	Class B	Łęczna, Puławy	
Communes	Class A	Lublin (1), Kraśnik (1), Łuków (1), Puławy (1), Radzyń Podlaski (1), Włodawa (1), Biała Podlaska (1), Biłgoraj (1), Rejowiec Fabryczny (1), Tomaszów Lubelski (1), Chełm (1), Zamość (1), Lubartów (1), Łęczna (3), Puchaczów (2), Świdnik (1)	
	Class B	Janów Lubelski (3), Stoczek Łukowski (1), Poniatowa (3), Dęblin (1), Międzyrzec Podlaski (1), Terespol (1), Parczew (3), Hrubieszów (1), Krasnystaw (1), Lubartów (2), Wólka (2)	

Source: Authors' own calculations.

* On the above list and further in the report gm. is a Polish abbreviation for gmina – commune and m. is an abbreviation for miasto – city. If there is information city following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Lublin voivodship made a contribution of 3.8 % to the GDP of Poland. Calculated per capita, it amounted to PLN 25,079, compared with the average for Poland of PLN 37,096. With this result the voivodship takes the 15th place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 157% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (43.8%) whereas a share of the agricultural and industrial sectors are respectively 38.3% and 17.9% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 2,165,651 (as of 2013), which is 5.6% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 18.6% of the population at pre-productive age, 63% at productive age and 18.4% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 13.7% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3286.1, which is 87.1% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 19 higher education institutions in which there are 93 thousand students studying, which makes up 5.5% of all students in Poland. Moreover, 4.8% of the secondary school students in the voivodship attend vocational schools and 5.7% attend technical schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all:

industry (manufacture of food products, manufacture of furniture and manufacturing n.e.c., manufacture of machinery and equipment, manufacture of non-metallic mineral products, automobile industry, manufacture of metal products, manufacture of wood and wooden products, chemical industry), construction, market services (an important element of institutional business surroundings is the banking sector backed 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 the voivodship i.a. in the following special economic zones:

- Mielec SEZ, subzones in: m. Lubartów, m. Lublin, m. Radzyń Podlaski, m. Zamość,
- Starachowice SEZ, subzone: m. Puławy,
- Tarnobrzeg SEZ, subzones in: gm. Horodło, gm. Janów Lubelski, gm. Łuków, gm. Poniatowa, gm. Ryki, gm. Tomaszów Lubelski, gm. Ryki, m. Kraśnik, m. Łuków, m. Tomaszów Lubelski.

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

Lubusz (*Lubuskie*) voivodship is situated in central-western Poland. It borders Germany, which facilitates international economic cooperation. Fourteen border crossings and the membership of the Pro Europe Viadrina Euroregion and Spree-Neisse-Bober Euroregion create good conditions for 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.

The advantages of the voivodship include:

- a highly beneficial geopolitical location at the Western border, which allows to access attractive sales markets of Germany and other Western Europe countries,
- a beneficial location on an international traffic route, i.e. pan-European corridor East-West, which enables access to the foreign markets,
- a very well-developed regional communications network – 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),
- very good access to the Internet (in this respect the voivodship belongs to the highest rated regions in Poland),
- voivodship's activity in Euroregions; what particularly distinguishes the Lubusz 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 Łęknica commune, 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 studies[3] and attractive investment offers from special economic zones.

The general characteristics of the Lubusz voivodship are presented in Table 1.

[3] 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.

Table 1. General characteristics of the economy of Lubusz voivodship

Feature	Lubusz voivodship	Poland	Share [%]
Market potential			
GDP per capita 2010. (PLN/person)	31,348	37,096	-
Population (persons) on 31 December 2012	1,023,317	38,533,299	2.7
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	6,691	484,999	1.4
Secondary schools graduates (persons) in 2012	10,906	421,317	2.6
Number of employed persons on 31 December 2012	324,565	13,911,203	2.3
Structure of employed persons 2012	agriculture 11.1% industry 32.1% services 56.8%	agriculture 17.1% industry 27.4% services%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	805.6	73,704.4	1.1
Capital of companies (PLN m) in 2011	1,949	194,160.6	1
Special economic zones (SEZs) in the voivodship*			
– Kostrzyn-Słubice SEZ, subzones in: gm. Bytom Odrzański, gm. Czerwieńsk, gm. Dobiegniew, gm. Gubin, gm. Kargowa, gm. Kożuchów, gm. Lubsko, gm. Międzyrzecz, gm. Rzepin, gm. Skwierzyna, gm. Słubice, gm. Sulęcin, gm. Zielona Góra, m. Gorzów Wielkopolski, m. Gubin, m. Kostrzyn nad Odrą, m. Nowa Sól, m. Zielona Góra – Wałbrzych SEZ, subzones in: gm. Szprotawa			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	Tourism Class C		
Real investment attractiveness RAI	National economy Class B Industry Class C Science and technical professional activity Class C		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	Gorzów Wielkopolski, Zielona Góra,	
	Class B		
Communes	Class A	Kostrzyn nad Odrą (1), Słubice (3), Gorzów Wielkopolski (1), Gubin (1), Nowa Sól (1), Lubrza (2), Żagań (1), Łęknica (1), Żary (1), Zielona Góra (1),	
	Class B	Kłodawa (2), Witnica (3), Międzyrzecz (3), Skwierzyna (3), Świebodzin (3), Zbąszynek (3), Babimost (3), Sulechów (3), Zielona Góra (2), Wschowa (3),	

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Lubusz voivodship made a contribution of 2.2 % to the GDP of Poland. Calculated per capita, it amounted to PLN 31,348, with the average for Poland of PLN 37,096. With this result the voivodship takes the 9th place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 164.4% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (56.8%) whereas a share of the agricultural and industrial sectors are respectively 11.1% and 32.1% (Central Statistical Office, Regional Data Bank 2013).

The registered unemployment rate in the voivodship amounted to 15.3% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3185.2, which is 84.5% of the average for Poland.

The number of inhabitants of the voivodship amounts to 1,023,317 (as of 2013), which is 2.7% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 18.6% of the population at pre-productive age, 64.9% at productive age and 16.5% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 12.9% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3185.2, which is 84.5% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 8 higher education institutions in which there are 21 thousand students studying, which makes up 1.3% of all students in Poland. Moreover, 1.3% of the secondary school students in the voivodship attend vocational schools and 2.9% attend technical schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: wood pulp and paper, wood, electronic, food, glass, construction ceramics, machines and biotechnology.

Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following special economic zones:

- Kostrzyn-Słubice SEZ, subzones in: gm. Bytom Odrzański, gm. Czerwieńsk, gm. Dobiegniew, gm. Gubin, gm. Kargowa, gm. Kożuchów, gm. Lubsko, gm. Międzyrzecz, gm. Rzepin, gm. Skwierzyna, gm. Słubice, gm. Sulęcin, gm. Zielona Góra, m. Gorzów Wielkopolski, m. Gubin, m. Kostrzyn nad Odrą, m. Nowa Sól, m. Zielona Góra,
- SSE Wałbrzych, subzone: gm. Szprotawa.

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 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 proximity of Stryków, an interchange of highways is planned. This will increase the voivodships attractiveness as a location for investments targeted at domestic market of Poland.
- access to big 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,
- big R&D potential of the higher education institutions and research establishments of the area of Łódź[4],
- substantial resources of brown coal thanks to which the surplus of cheap electricity is available in the voivodship,
- 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.

The general characteristics of the Łódź voivodship are presented in Table 1.

Table 1. General characteristics of the economy of Łódź voivodship

Feature	Łódź voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	34,180	37,096	-
Population (persons) on 31 December 2012	2,524,651	38,533,299	6.6
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	28,999	484,999	6.0
Secondary schools graduates (persons) in 2012	25,971	421,317	6.2
Number of employed persons on 31 December 2012	933,578	13,911,203	6.7

[4] 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.

Structure of employed persons 2012	agriculture 19.2% industry 28.4% services 52.4%	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	2,384.7	73,704.4	3.2
Capital of companies (PLN m) in 2011	4,998.8	194,160.6	2.6
Special economic zones (SEZs) in the voivodship*			
– Łódź SEZ, subzones in: gm. Aleksandrów Łódzki, gm. Brójce, gm. Kleszczów, gm. Koluszki, gm. Ksawerów, gm. Opoczno, gm. Paradyż, gm. Sławno, gm. Stryków, gm. Tomaszów Mazowiecki, gm. Ujazd, gm. Widawa, gm. Wieluń, gm. Wola Krzysztoporska, gm. Wolbórz, gm. Wróblew, gm. Zgierz, gm. Żychlin, m, Bełchatów, m, Konstantynów Łódzki, m, Kutno, m, Łęczyca, m, Łowicz, m, Łódź, m, Ozorków, m, Piotrków Trybunalski, m, Radomsko, m, Rawa Mazowiecka, m, Sieradz, m, Skierniewice, m, Tomaszów Mazowiecki, m, Zduńska Wola, m, Zgierz – Starachowice SEZ, subzone: gm. Mniszków			
Distinguishing investment attractiveness ratings PAI _2 and RAI (Class A, B and C)			
Potential investment attractiveness PAI_2	National economy Class C Labour-intensive industry Class B Trade Class C		
Real investment attractiveness RAI	National economy Class B Trade Class B Tourism Class B Science and technical professional activity Class C		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	Łódź, Bełchatów, Piotrków Trybunalski, Skierniewice	
	Class B		
Counties	Class A	Ksawerów (2), Zduńska Wola (1), Kutno (1), Łęczyca (1), Łowicz (1), Rawa Mazowiecka (1), Zgierz (1), Skierniewice (1), Aleksandrów Łódzki (3), Andrespol (2), Brzeziny (1), Łódź (1), Bełchatów (1), Kleszczów (2), Nowosolna (2), Radomsko (1), Rzgów (3), Tomaszów Mazowiecki (1), Konstantynów Łódzki (1), Piotrków Trybunalski (1), Pabianice (1)	
	Class B	Sieradz (1), Pabianice (2), Głowno (1), Ozorków (1), Rawa Mazowiecka (2), Stryków (3), Szczerców (2), Tuszyn (3), Działoszyn (3), Rząśnia (2), Sulmierzyce (2)	

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune

In 2010 Łódź voivodship made a contribution of 6.1% to the GDP of Poland. Calculated per capita, it amounted to PLN 34,180 with the average for Poland PLN 37,096. With this result the voivodship takes the second place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 163% while the average for Poland amounted to 168%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (52.4%) whereas a share of the agricultural and industrial sectors are respectively 19.2% and 28.4% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 2,524,651 (as of 2013), which is 6.6% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 17.1% of the population at pre-productive age, 62.9% at productive age and 20% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 13.7% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3430.8, which is 91% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 29 higher education institutions in which there are 102 thousand students studying, which makes up 6.1% of all students in Poland. Moreover, 5.2% of the secondary school students in the voivodship attend vocational schools and 5.8% attend technical schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: power industry, logistics, textile industry, manufacture of food, construction, manufacture of chemical products and biotechnology.

Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following special economic zones:

- SSE Łódź. subzones in: gm. Aleksandrów Łódzki, gm. Brójce, gm. Kleszczów, gm. Koluszki, gm. Ksawerów, gm. Opoczno, gm. Paradyż, gm. Sławno, gm. Stryków, gm. Tomaszów Mazowiecki, gm. Ujazd, gm. Widawa, gm. Wieluń, gm. Wola Krzysztoporska, gm. Wolbórz, gm. Wróblew, gm. Zgierz, gm. Żychlin, m. Bełchatów, m. Konstantynów Łódzki, m. Kutno, m. Łęczyca, m. Łowicz, m. Łódź, m. Ozorków, m. Piotrków Trybunalski, m. Radomsko, m. Rawa Mazowiecka, m. Sieradz, m. Skierniewice, m. Tomaszów Mazowiecki, m. Zduńska Wola, m. Zgierz,
- SSE Starachowice. subzone: gm. Mniszków.

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

Lesser Poland (*małopolskie*) voivodship is situated in central-southern Poland and borders 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 communication: 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,
- big 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[5],
- 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.

The general characteristics of the Lesser Poland voivodship are presented in Table 1.

[5]In 2010 the Ministry of Science and Higher Education ranked among the best scientific establishments in Poland the following ones: Institute of Catalysis and Surface Chemistry of Polish Academy of Sciences (PAS), Institute of Pharmacology, Institute of Nature Conservation, Institute of Botanics PAS, Matalurgy and Engineering Institute in Kraków, Material Engineering and Ceramics Faculty, Mechanic Engineering and Robotics Institute, Geology, Geophysics and Nature Conservation Faculty of University of Science and Technology, Chemistry Faculty, Law and Administration Faculty, Collegium Medicum, Biochemistry Biophysics and Biotechnology Faculty, and Biology Faculty, Earth Sciences Faculty, Mathematics and Informatics Faculty of Jagiellonian University, Foundry Research Institute, Faculty of Architecture of Kraków University of Technology, Industrial Forms Faculty of Kraków Academy of Fine Arts, Economics and International Relations Faculty, Management and Social Communications Faculty, Commodity Science Faculty of Kraków University of Technology.

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

Feature	Lesser Poland voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	31,501	37,096	-
Population (persons) on 31 December 2012	3,354,077	38,533,299	8.7
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	55972	484999	11.5
Secondary schools graduates (persons) in 2012	40411	421317	9.6
Number of employed persons on 31 December 2012	1240844	13911203	8.9
Structure of employed persons 2012	agriculture 22.0% industry 24.7% services 53.3%	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	2,948.4	73,704.4	4
Capital of companies (PLN m) in 2011	1,1313	194,160.6	5,8
Special economic zones (SEZs) in the voivodship*			
– Katowice SEZ, subzone: gm. Myślenice – Kraków SEZ, subzone: gm. Andrychów, gm. Bochnia, gm. Chełmek, gm. Dobczyce, gm. Gdów, gm. Książ Wielki, gm. Niepołomice, gm. Skawina, gm. Słomniki, gm. Wolbrom, gm. Zabierzów, gm. Zator, m. Bochnia, m. Bukowno, m. Kraków, m. Limanowa, m. Nowy Sącz, m. Oświęcim, m. Tarnów – Mielec SEZ, subzone: m. Gorlice			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	National economy Class B Capital-intensive industry Class A Labour-intensive industry Class B Trade Class C Tourism Class B Education Class B		
Real investment attractiveness RAI	Industry Class B Trade Class C Professional, scientific and technical activities Class C		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	Wieliczka, Kraków, Nowy Sącz, Tarnów	

	Class B	Myślenice, Oświęcim
Communes	Class A	Bochnia (1), Mogilany (2), Skawina (3), Świątniki Górne (3), Wielka Wieś (2), Zabierzów (2), Zielonki (2), Dobczyce (3), Myślenice (3), Siepraw (2), Kłaj (2), Niepołomice (3), Wieliczka (3), Kraków (1), Gorlice (1), Limanowa (1), Mszana Dolna (1), Krynica-Zdrój (3), Zakopane (1), Nowy Sącz (1), Alwernia (3), Chrzanów (3), Trzebinia (3), Bukowno (1), Bolesław (2), Klucze (2), Olkusz (3), Oświęcim (1), Brzeszcze (3), Kęty (3), Zator (3), Andrychów (3), Wadowice (3), Tarnów (1)
	Class B	Bochnia (2), Łapanów (2), Rzezawa (2), Żegocina (2), Jerzmanowice-Przeginia (2), Kocmyrzów-Luborzyca (2), Krzeszowice (3), Liszki (2), Michałowice (2), Skała (3), Sułkowice (3), Sękowa (2), Tymbark (2), Grybów (1), Chełmiec (2), Kamionka Wielka (2), Muszyna (3), Rytro (2), Nowy Targ (1), Rabka-Zdrój (3), Spytkowice (2), Libiąż (3), Wolbrom (3), Chełmek (3), Osiek (2), Oświęcim (2), Polanka Wielka (2), Przeciszów (2), Jordanów (1), Sucha Beskidzka (1), Spytkowice (2), Brzesko (3), Dębno (2), Dąbrowa Tarnowska (3), Skrzyszów (2), Tarnów (2), Wierzchosławice (2)

Source: Authors own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Lesser Poland voivodship made a contribution of 7.3% to the GDP of Poland. Calculated per capita, it amounted to PLN 31,501 with the average for Poland PLN 37,096. With this result the voivodship takes the 8th place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 168.5% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (53.3%) whereas a share of the agricultural and industrial sectors are respectively 22% and 24.7% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 3,354,077 (as of 2013), which is 8.7% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 19.4% of the population at pre-productive age, 63.3% at productive age and 17.3% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 11.3% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3468.4, which is 92% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 33 higher education institutions in which there are 203 thousand students studying, which makes up 12.1% of all students in Poland. Moreover, 10.4% of the secondary school students in the voivodship attend vocational schools and 9.4% attend technical schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: education, higher education and science, 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 special economic zones:

- Katowice SEZ, subzone in: gm. Myślenice,
- Kraków SEZ, subzones in: gm. Andrychów, gm. Bochnia, gm. Chełmek, gm. Dobczyce, gm. Gdów, gm. Książ Wielki, gm. Niepołomice, gm. Skawina, gm. Słomniki, gm. Wolbrom, gm. Zabierzów, gm. Zator, m. Bochnia, m. Bukowno, m. Kraków, m. Limanowa, m. Nowy Sącz, m. Oświęcim, m. Tarnów,
- Mielec SEZ, subzone in: m. Gorlice.

7. The profile of regional economy of Mazovian voivodship

Mazovian voivodship is situated in central-eastern Poland in the Mazovian Lowlands. It is the largest and most populous region of Poland. It is the most economically developed and the most attractive voivodship for investments and distances all other regions of Poland in terms of GDP per capita. A characteristic feature of the region is its servicisation, 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 all branches of industry have developed in Mazovia, particularly manufacture of means of transportation and petrochemical industry. The main administrative centre is Warsaw, the capital city of Poland, which (together with its suburban area) is one of the most attractive investment 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 to 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,
- presence of numerous higher education institutions and research establishments,[6]
- the highest GDP per capita rate in the country,
- substantial human resources, including both low-qualified workers with low wage expectations and specialists trained in various fields,
- very high labour productivity compensating a relatively high level of wages and salaries,
- presence of the Warsaw Stock Exchange, the capital centre of Central and Eastern Europe,
- investment incentives for investors offered in special economic zones.

The general characteristics of the Mazovian voivodship are presented in Table 1.

[6] 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).

Table 1. General characteristics of the economy of Mazovian voivodship

Feature	Mazovian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	60,359	37,096	-
Population (persons) on 31 December 2012	5,301,760	38,533,299	13.8
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	85,053	484,999	17.5
Secondary schools graduates (persons) in 2012	53,772	421,317	12.8
Number of employed persons on 31 December 2012	2,262,092	13,911,203	16.3
Structure of employed persons 2012	agriculture 13.3% industry 19.9% services 66.8%	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	34,734.7	73,704.4	47.1
Capital of companies (PLN m) in 2011	92,113.0	194,160.6	47.4
Special economic zones (SEZs) in the voivodship*			
– Łódź SEZ, subzone: gm. Grodzisk Mazowiecki, gm. Zelów, gm. Żabia Wola, m. M.st.Warszawa, m. Płock, m. Pruszków, m. Raciąż, m. Sochaczew, m. Żyrardów – Starachowice SEZ, subzone: gm. Iłża, gm. Szydłowiec – Suwałki SEZ, subzone: gm. Małkinia Górna – Tarnobrzeg SEZ, subzone: gm. Mińsk Mazowiecki, gm. Nowe Miasto nad Pilicą, gm. Ożarów Mazowiecki, gm. Pilawa, gm. Przasnysz, gm. Siedlce, gm. Wyszków, m. Pionki, m. Radom, m. Siedlce, m. Węgrów – Warmia-Mazury SEZ, subzone: gm. Ciechanów, m. Ciechanów, m. Mława, m. Ostrołęka			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	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 RAI	National economy Class A Industry Class A Trade Class A Tourism Class A Professional, scientific and technical activities Class A		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			

Counties	Class A	Płock, Ostrołęka, Siedlce, Warszawa (city) , Grodzisk Mazowiecki, Piaseczno, Pruszków, Warsaw West
	Class B	Radom, Legionowo
Communes	Class A	Ciechanów (1), Mława (1), Słupno (2), Płońsk (1), Sierpc (1), Płock (1), Maków Mazowiecki (1), Ostrów Mazowiecka (1), Sokołów Podlaski (1), Wyszków (3), Ostrołęka (1), Siedlce (1), Białobrzegi (3), Kozienice (3), Pionki (1), Radom (1), M.st.Warszawa (1), Garwolin (1), Legionowo (1), Nieporęt (2), Serock (3), Mińsk Mazowiecki (1), Halinów (3), Sulejówek (1), Nowy Dwór Mazowiecki (1), Józefów (1), Otwock (1), Kobyłka (1), Marki (1), Ząbki (1), Zielonka (1), Radzymin (3), Wołomin (3), Milanówek (1), Podkowa Leśna (1), Grodzisk Mazowiecki (3), Jaktorów (2), Grójec (3), Konstancin-Jeziorna (3), Lesznowola (2), Piaseczno (3), Tarczyn (3), Piastów (1), Pruszków (1), Brwinów (3), Michałowice (2), Nadarzyn (2), Raszyn (2), Sochaczew (1), Błonie (3), Izabelin (2), Łomianki (3), Ożarów Mazowiecki (3), Stare Babice (2), Żyrardów (1)
	Class B	Gostynin (1), Łosice (3), Różan (3), Rzekuń (2), Przasnysz (1), Siedlce (2), Węgrów (1), Garwolin (2), Wieliszew (2), Czosnów (2), Kołbiel (2), Góra Kalwaria (3), Mszczonów (3), Radziejowice (2)

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Mazovian voivodship made a contribution of 22.3% to the GDP of Poland. Calculated per capita, it amounted to PLN 60,359with the average for Poland PLN 37,096. With this result the voivodship takes the first place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 180.3%. while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (66.8%) whereas a share of the agricultural and industrial sectors are respectively 13.3% and 19.9% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 5,301,760 (as of 2013), which is 13.8% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 18.6% of the population at pre-productive age, 62.8% at productive age and 18.6% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 11.1% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 4577, which is 121.4% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 108 higher education institutions in which there are 312 thousand students studying, which makes up 18.6% of all students in Poland. Moreover, 9.2% of the secondary school students in the voivodship attend vocational schools and 11.3% attend technical schools.

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

Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following special economic zones:

- Łódź SEZ, subzone: gm. Grodzisk Mazowiecki, gm. Zelów, gm. Żabia Wola, m. Warszawa, m. Płock, m. Pruszków, m. Raciąż, m. Sochaczew, m. Żyrardów,
- Starachowice SEZ, subzone: gm. Iłża, gm. Szydłowiec,
- Suwałki SEZ, subzone: gm. Małkinia Górna,
- Tarnobrzeg SEZ, subzone: gm. Mińsk Mazowiecki, gm. Nowe Miasto nad Pilicą, gm. Ożarów Mazowiecki, gm. Pilawa, gm. Przasnysz, gm. Siedlce, gm. Wyszków, m. Pionki, m. Radom, m. Siedlce, m. Węgrów,
- Warmia-Mazury SEZ, subzone: gm. Ciechanów, m. Ciechanów, m. Mława, m. Ostrołęka.

8. The profile of regional economy of Opole voivodship

Opole 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 and fertile soils also influence positively the quality of location for food industry. 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),
- 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),
- presence of higher education institutions,[7]
- rich resources for manufacture of mineral products – the possibility of specialisation in sectors supporting the construction industry,
- 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.

The general characteristics of the Opole voivodship are presented in Table 1.

[7] 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.

Table 1. General characteristics of the economy of Opole voivodship

Feature	Opole voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	29,498	37,096	-
Population (persons) on 31 December 2012	1,010,203	38,533,299	2.6
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	11,792	484,999	2.4
Secondary schools graduates (persons) in 2012	10,398	421,317	2.5
Number of employed persons on 31 December 2012	314,242	1,391,1203	2.3
Structure of employed persons 2012	agriculture 16.1% industry 31.8% services 52.1%	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	877.4	73704.4	1.2
Capital of companies (PLN m) in 2011	1690.6	194160.6	0.9
Special economic zones (SEZs) in the voivodship*			
– Katowice SEZ, subzones in: gm. Gogolin, gm. Kietrz, gm. Krapkowice, gm. Strzelce Opolskie, gm. Ujazd, m. Kędzierzyn-Koźle – Starachowice SEZ, subzone: gm. Tułowice – Wałbrzych SEZ, subzones in: gm. Kluczbork, gm. Namysłów, gm. Nysa, gm. Praszka, gm. Prudnik, gm. Skarbimierz, m. Opole			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2			
Real investment attractiveness RAI	Science and technical professional activity Class B		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	Opole	
	Class B		
Communes	Class A	Brzeg (1), Skarbimierz (2), Namysłów (3), Kędzierzyn-Koźle (1), Zdzieszowice (3), Dobrzeń Wielki (2), Tułowice (2), Opole (1)	
	Class B	Kluczbork (3), Nysa (3), Prudnik (3), Bierawa (2), Gogolin (3), Krapkowice (3), Chrząstowice (2), Niemodlin (3), Ujazd (3)	

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Opole voivodship made a contribution of 2.1% to the GDP of Poland. Calculated per capita, it amounted to PLN 29,498 with the average for Poland PLN 37,096. With this result the voivodship takes the 11th place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 164.7% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (52.1%) whereas a share of the agricultural and industrial sectors are respectively 16.1% and 31.8% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 1,010,203 (as of 2013), which is 2.6% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 16.6% of the population at pre-productive age, 65.1% at productive age and 18.3% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 13.5% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3335.8, which is 88.5% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 6 higher education institutions in which there are 35 thousand students studying, which makes up 2.1% of all students in Poland. Moreover, 3.1% of the secondary school students in the voivodship attend vocational schools and 2.7% attend technical schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: manufacture of chemicals and chemical products, manufacture of food, construction and others: power industry, 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 the voivodship i.a. in the following special economic zones:

- Katowice SEZ subzone: gm. Gogolin, gm. Kietrz, gm. Krapkowice, gm. Strzelce Opolskie, gm. Ujazd, m. Kędzierzyn-Koźle,
- Starachowice SEZ, subzone: gm. Tułowice,
- Wałbrzych SEZ, subzone: gm. Kluczbork, gm. Namysłów, gm. Nysa, gm. Praszka, gm. Prudnik, gm. Skarbimierz, m. Opole.

9. The profile of regional economy of Subcarpathian voivodship

Subcarpathian voivodship is situated in south-eastern Poland. It borders 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 industries.

The main advantages of the voivodship are:

- developing aviation industry,
- well-established manufacture of pharmaceuticals, IT and food industry,
- 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 management and technical staff, 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 with the only training centre for civil pilots in Poland).

The general characteristics of the Subcarpathian voivodship are presented in Table 1.

Table 1. General characteristics of the economy of Subcarpathian voivodship

Feature	Subcarpathian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	24,973.0	37,096	-
Population (persons) on 31 December 2012	2,129,951	38,533,299	5.5
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	20,174	484,999	4.2
Secondary schools graduates (persons) in 2012	28,713	421,317	6.8
Number of employed persons on 31 December 2012	794,727	13,911,203	5.7
Structure of employed persons 2012	agriculture 32.7% industry 24.8% services 42.5%	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	1,177.8	73,704.4	1.6
Capital of companies (PLN m) in 2011	2,234.5	194,160.6	1.2
Special economic zones (SEZs) in the voivodship*			

– Kraków SEZ, subzone: gm. Boguchwała, m. Krosno, – Mielec SEZ, subzone: gm. Dębica, gm. Głogów Małopolski, gm. Jarosław, gm. Kolbuszowa, gm. Leżajsk, gm. Ostrów, gm. Ropczyce, gm. Trzebownisko, gm. Zagórz, m. Dębica, m. Jarosław, m. Krosno, m. Leżajsk, m. Lubaczów, m. Mielec, m. Rzeszów, m. Sanok – Tarnobrzeg SEZ, subzone: gm. Gorzyce, gm. Jasło, gm. Jedlicze, gm. Nisko, gm. Nowa Dęba, gm. Orły, gm. Rymanów, m. Jasło, m. Przemyśl, m. Przeworsk, m. Stalowa Wola, m. Tarnobrzeg,		
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)		
Potential investment attractiveness PAI_2		Capital-intensive industry Class C Education Class C
Real investment attractiveness RAI		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)		
Counties	Class A	Krosno, Przemyśl, Rzeszów, Tarnobrzeg,
	Class B	
Communes	Class A	Jasło (1), Krościenko Wyżne (2), Sanok (1), Krosno (1), Jarosław (1), Lubaczów (1), Przeworsk (1), Przemyśl (1), Łańcut (1), Czarna (2), Ostrów (2), Rzeszów (1), Dębica (1), Dębica (2), Leżajsk (1), Mielec (1), Stalowa Wola (1), Tarnobrzeg (1)
	Class B	Dukla (3), Iwonicz-Zdrój (3), Jedlicze (3), Miejsce Piastowe (2), Solina (2), Radymno (1), Kolbuszowa (3), Łańcut (2), Ropczyce (3), Boguchwała (3), Głogów Małopolski (3), Krasne (2), Trzebownisko (2), Nowa Sarzyna (3), Nisko (3), Gorzyce (2), Nowa Dęba (3)

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Subcarpathian voivodship made a contribution of 3.7% to the GDP of Poland. Calculated per capita, it amounted to PLN 24,973 with the average for Poland PLN 37,096. With this result the voivodship takes the 16th place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 158.5% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (42.5%) whereas a share of the agricultural and industrial sectors are respectively 32.7% and 24.8% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 2,129,951 (as of 2013), which is 5.5% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 19.5% of the population at pre-productive age, 63.9% at productive age and 17.8% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 15.5% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3136, which is 83.2% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 15 higher education institutions in which there are 68 thousand students studying, which makes up 4.1% of all students in Poland. Moreover, 5.9% of the secondary school students in the voivodship attend vocational schools and 6.7% attend technical schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: aviation, electromachinery, foods, chemistry and tourism.

Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following special economic zones:

- Kraków SEZ, subzone: gm. Boguchwała, m. Krosno,
- Mielec SEZ, subzone: gm. Dębica, gm. Głogów Małopolski, gm. Jarosław, gm. Kolbuszowa, gm. Leżajsk, gm. Ostrów, gm. Ropczyce, gm. Trzebownisko, gm. Zagórz, m. Dębica, m. Jarosław, m. Krosno, m. Leżajsk, m. Lubaczów, m. Mielec, m. Rzeszów, m. Sanok,
- Tarnobrzeg SEZ, subzone: gm. Gorzyce, gm. Jasło, gm. Jedlicze, gm. Nisko, gm. Nowa Dęba, gm. Orły, gm. Rymanów, m. Jasło, m. Przemyśl, m. Przeworsk, m. Stalowa Wola, m. Tarnobrzeg.

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, meet, poultry, cereals processing) and the following sectors: light industry, timber industry, construction and the manufacture of machinery and equipment.

The main advantages of the voivodship are:

- its location in the centre of Europe and in the European Union, which plays a principal role both in local transport and in the network of international transport,
- many express roads in the voivodship of which the most important are the routes: Berlin-Warsaw-Grodno-Sankt Petersburg and Warsaw-Helsinki (part of Via Baltica express road, which connects Baltic countries with Western Europe),
- big area of grasslands that creates good conditions of farming of cattle, mainly dairy cattle, which influences the voivodship leading position on the market,
- an opportunity of creating local biogas facilities and production of renewable energy connected with favourable conditions for animal husbandry,
- voivodship's human capital is built by the largest universities in the region, i.e.:

  → the University of Białystok – the main courses of study: computer science, biology, chemistry, economics, physics, mathematics, environmental protection, law, sociology, East-Slavonic philology,

  → the Białystok University of Technology – the 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,

  The following universities highly ranked (category I) by the Ministry of Science and Higher Education:

  - Medical University in Białystok; Faculty of Medicine with the Stomatology Department and Faculty of Pharmacy with Laboratory Medicine Department,
  - University of Białystok; Faculty of Health Sciences and Faculty if Physics
- low labour costs accompanied by relatively high labour productivity,
- relatively high innovativeness in comparison to the level of economic development,
- 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.

The general characteristics of the Podlaskie voivodship are presented in Table 1.

Table 1. General characteristics of the economy of Podlaskie voivodship

Feature	Podlaskie voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010.	26,985	37,096	-
Population (persons) on 31 December 2012	1,198,690	38,533,299	3.1
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	14,662	484,999	3.0
Secondary schools graduates (persons) in 2012	14,772	421,317	3.5
Number of employed persons on 31 December 2012	403,128	13,911,203	2.9
Structure of employed persons 2012	agriculture 31.4% industry 20.6% services 48.0%	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	1,017.6	73,704.4	1.4
Capital of companies (PLN m) in 2011	582.3	194,160.6	0.3
Special economic zones (SEZs) in the voivodship*			
– Suwałki SEZ, subzone: m. Białystok, m. Grajewo, m. Suwałki, gm. Suwałki – Tarnobrzeg SEZ, subzone: gm. Łapy			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness			

PAI_2		
Real investment attractiveness RAI		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)		
Coun ties	Class A	Białystok, Łomża
	Class B	Suwałki
Com munes	Class A	Białystok (1), Brańsk (1), Hajnówka (1), Siemiatycze (1), Wysokie Mazowieckie (1), Zambrów (1), Łomża (1), Sejny (1), Suwałki (1)
	Class B	Choroszcz (3), Juchnowiec Kościelny (2), Łapy (3), Supraśl (3), Wasilków (3), Bielsk Podlaski (1), Augustów (1), Grajewo (1)

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Podlaskie voivodship made a contribution of 2.3 % to the GDP of Poland. Calculated per capita, it amounted to PLN 26,895 with the average for Poland PLN 37,096. With this result the voivodship takes the 14th place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 159% while the average for Poland amounted to 168%. 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%) whereas a share of the agricultural and industrial sectors are respectively 31.4% and 20.6% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 1,198,690 (as of 2013), which is 3.1% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 18.2% of the population at pre-productive age, 63.7% at productive age and 18.1% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 14.5% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3202.2, which is 84.9% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 18 higher education institutions in which there are 47 thousand students studying, which makes up 2.8% of all students in Poland. Moreover, 2.2% of the secondary school students in the voivodship attend vocational schools and 3.5% attend technical schools.

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

Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following special economic zones:

- Suwałki SEZ, subzone: m. Białystok, m. Grajewo, m. Suwałki, gm. Suwałki,
- Tarnobrzeg SEZ, subzone: gm. Łapy.

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 conductive 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:

- 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 areas.
- little 'Silicon Valley' being created on the outskirts of Gdańsk, where 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 have their seats. 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 small workshops about 10 thousand artisans and artists work and design jewellery. Their annual revenue, especially export revenue, is estimated to more than USD 300m. In 2006 the only Museum of Amber in the world was opened in Gdańsk.
- favourable natural conditions conducive to the development of tourism,
- significant port complex in the region of both domestic and international importance,
- big 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 I) by the Ministry of Science and Higher Education (the Institute of Hydroengineering, Maritime Institute).

The general characteristics of the Pomeranian voivodship are presented in Table 1.

Table 1. General characteristics of the economy of Pomeranian voivodship

Feature	Pomeranian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	35,597	37,096	-
Population (persons) on 31 December 2012	2,290,070	38,533,299	5.9
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	29,280	484,999	6

Secondary schools graduates (persons) in 2012	23,433	421,317	5.6
Number of employed persons on 31 December 2012	744,321	13,911,203	5.4
Structure of employed persons 2012	agriculture 8.9% industry 29.3% services 61.8%	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	3841	73704.4	5.2%
Capital of companies (PLN m) in 2011	15042.1	194160.6	7.7%
Special economic zones (SEZs) in the voivodship*			
– Pomeranian SEZ, subzone: gm. Chojnice, gm. Człuchów, gm. Gniewino, gm. Krokowa, gm. Sztum, gm. Tczew, m. Gdańsk, m. Gdynia, m. Kwidzyn, m. Malbork, m. Starogard Gdański, m. Tczew – Słupsk SEZ, subzone: gm. Debrzno, gm. Słupsk, gm. Żukowo, m. Słupsk			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	National economy Class B Capital-intensive industry Class A Labour-intensive industry Class C Trade Class B Tourism Class B Education Class B		
Real investment attractiveness RAI	National economy Class C Industry Class C		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	Słupsk, Gdańsk (city), Gdynia, Sopot	
	Class B	Gdańsk, Puck	
Communes	Class A	Pruszcz Gdański (1), Kolbudy (2), Pruszcz Gdański (2), Krynica Morska (1), Sztutowo (2), Hel (1), Jastarnia (1), Puck (1), Władysławowo (1), Kosakowo (2), Reda (1), Rumia (1), Wejherowo (1), Chojnice (1), Człuchów (1), Lębork (1), Łeba (1), Ustka (1), Słupsk (1), Kościerzyna (1), Kwidzyn (1), Malbork (1), Starogard Gdański (1), Tczew (1), Gdańsk (1), Gdynia (1), Sopot (1),	
	Class B	Pszczółki (2), Żukowo (3), Krokowa (2), Puck (2), Bytów (3), Lipnica (2), Rzeczenica (2), Kobylnica (2), Słupsk (2), Skórcz (1), Sztum (3),	

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Pomeranian voivodship made a contribution of 5.6% to the GDP of Poland. Calculated per capita, it amounted to PLN 35,597 with the average for Poland PLN 37,096. With this result the voivodship takes the fifth place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 166.2% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (61.8%) whereas a share of the agricultural and industrial sectors are respectively 8.9% and 29.3% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 2,290,070 (as of 2013), which is 5.9% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 19.7% of the population at pre-productive age, 63.9% at productive age and 16.4% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 12.8% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3792.4, which is 100.6% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 29 higher education institutions in which there are 106 thousand students studying, which makes up 6.3% of all students in Poland. Moreover, 7.2% of the secondary school students in the voivodship attend vocational schools and 5.8% attend technical schools.

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

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following special economic zones:

- Pomeranian SEZ, subzone: gm. Chojnice, gm. Człuchów, gm. Gniewino, gm. Krokowa, gm. Sztum, gm. Tczew, m. Gdańsk, m. Gdynia, m. Kwidzyn, m. Malbork, m. Starogard Gdański, m. Tczew,
- Słupsk SEZ, subzone: gm. Debrzno, gm. Słupsk, gm. Żukowo, m. Słupsk.

12. The profile of regional economy of Silesian voivodship

Silesian voivodship is one of the most attractive 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 biggest city complex in Poland, creating a unique investment potential,

• the biggest traffic junction in Poland, conductive to industry development, with numerous cooperative connections - 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,

• high level of region's industrialization, with traditional specializations (mining, steel and machinery industry) but subject to successful restructurization,

• numerous economic subzones, offering attractive investment sites,

• the main courses of study referring to technical science (Częstochowa University of Technology, Silesia University of Technology), which is a result of economic profile of the region,

• the voivodship offers wide investment opportunities, which is confirmed by very high investment attractiveness ranks for the national economy, labour-intensive industry, capital-intensive industry, trade, tourism, financial intermediary, services for business and education.

The general characteristics of the Silesian voivodship are presented in Table 1.

Table 1. General characteristics of the economy of Silesian voivodship

Feature	Silesian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	39,677	37,096	-
Population (persons) on 31 December 2012	4,615,870	38,533,299	12
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	48,657	484,999	10.0
Secondary schools graduates (persons) in 2012	46,032	421,317	10.9
Number of employed persons on 31 December 2012	1,648,115	13,911,203	1.8
Structure of employed persons 2012	agriculture 6.2% industry 36.9% services 56.9%	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	8,852.8	73,704.4	12

<table>
<tr><td>Capital of companies (PLN m) in 2011</td><td>18,137.2</td><td>194,160.6</td><td>9.3</td></tr>
<tr><th colspan="4">Special economic zones (SEZs) in the voivodship*</th></tr>
<tr><td colspan="4">– Katowice SEZ, subzone: gm. Czechowice-Dziedzice, gm. Czerwionka-Leszczyny, gm. Godów, gm. Koniecpol, gm. Miedźno, gm. Pawłowice, gm. Radziechowy-Wieprz, gm. Racibórz, gm. Rajcza, gm. Rudziniec, gm. Siewierz, gm. Zawiercie, m. Bielsko-Biała, m. Bieruń, m. Bytom, m. Częstochowa, m. Dąbrowa Górnicza, m. Gliwice, m. Jastrzębie-Zdrój, m. Katowice, m. Knurów, m. Lubliniec, m. Orzesze, m. Rybnik, m. Siemianowice Śląskie, m. Sławków, m. Sosnowiec, m. Tychy, m. Zabrze, m. Zawiercie, m. Żory</td></tr>
<tr><th colspan="4">Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)</th></tr>
<tr><td colspan="2">Potential investment attractiveness PAI_2</td><td colspan="2">National economy Class A
Capital-intensive industry Class B
Labour-intensive industry Class A
Trade Class A
Education Class B</td></tr>
<tr><td colspan="2">Real investment attractiveness RAI</td><td colspan="2">National economy Class B
Industry Class B
Trade Class B
Tourism Class B
Professional, science and technical activities Class B</td></tr>
<tr><th colspan="4">Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)</th></tr>
<tr><td rowspan="2">Counties</td><td>Class A</td><td colspan="2">Bielsko-Biała (city), Bytom, Piekary Śląskie, Częstochowa, Gliwice, Chorzów, Katowice, Mysłowice, Ruda Śląska, Siemianowice Śląskie, Świętochłowice, Jastr</td></tr>
<tr><td>Class B</td><td colspan="2">Cieszyn, Tarnogóra, Zabrze, Będzin, Jaworzno, Pszczyna</td></tr>
<tr><td rowspan="2">Communes</td><td>Class A</td><td colspan="2">Bestwina (2), Czechowice-Dziedzice (3), Jaworze (2), Kozy (2), Porąbka (2), Wilamowice (3), Cieszyn (1), Ustroń (1), Wisła (1), Chybie (2), Skoczów (3), Zebrzydowice (2), Żywiec (1), Bielsko-Biała (1), Lubliniec (1), Radzionków (1), Tarnowskie Góry (1), Ożarowice (2), Bytom (1), Piekary Śląskie (1), Olsztyn (2), Poraj (2), Częstochowa (1), Knurów (1), Pyskowice (1), Gliwice (1), Zabrze (1), Chorzów (1), Katowice (1), Mysłowice (1), Ruda Śląska (1), Siemianowice Śląskie (1), Świętochłowice (1), Racibórz (1), Świerklany (2), Radlin (1), Rydułtowy (1), Wodzisław Śląski (1), Jastrzębie-Zdrój (1), Rybnik (1), Żory (1), Będzin (1), Czeladź (1), Wojkowice (1), Bobrowniki (2), Psary (2), Sławków (1), Zawiercie (1), Dąbrowa Górnicza (1), Jaworzno (1), Sosnowiec (1), Łaziska Górne (1), Mikołów (1), Ornontowice (2), Wyry (2), Goczałkowice-Zdrój (2), Miedźna (2), Pawłowice (2), Pszczyna (3), Suszec (2), Bieruń (1), Imielin (1), Lędziny (1), Chełm Śląski (2), Tychy (1)</td></tr>
<tr><td>Class B</td><td colspan="2">Szczyrk (1), Buczkowice (2), Jasienica (2), Wilkowice (2), Brenna (2), Hażlach (2), Strumień (3), Łękawica (2), Łodygowice (2), Boronów (2), Herby (2), Kalety (1), Miasteczko Śląskie (1), Krupski Młyn (2), Świerklaniec (2), Zbrosławice (2), Kamienica Polska (2), Mstów (2), Poczesna (2), Myszków (1), Gierałtowice (2), Czerwionka-Leszczyny (3), Gaszowice (2), Jejkowice (2), Pszów (1), Godów (2), Marklowice (2), Mszana (2), Mierzęcice (2), Siewierz (3), Łazy (3), Ogrodzieniec (3), Bojszowy (2)</td></tr>
</table>

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Silesian voivodship made a contribution of 13% to the GDP of Poland. Calculated per capita, it amounted to PLN 39,677 with the average for Poland PLN 37,096. With this result the voivodship takes the fifth place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 161.9% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (56.9%) whereas a share of the agricultural and industrial sectors are respectively 6.2% and 36.9% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 4,615,870 (as of 2013), which is 12% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 17.0% of the population at pre-productive age, 64.3% at productive age and 18.7% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 11.1% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3678.7, which is 105.2% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 45 higher education institutions in which there are 159 thousand students studying, which makes up 9.5% of all students in Poland. Moreover, 10.9% of the secondary school students in the voivodship attend vocational schools and 12% attend technical 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. in the following special economic zones:

- Katowice SEZ, subzone: gm. Czechowice-Dziedzice, gm. Czerwionka-Leszczyny, gm. Godów, gm. Koniecpol, gm. Miedźno, gm. Pawłowice, gm. Racibórz, gm. Radziechowy-Wieprz, gm. Rajcza, gm. Rudziniec, gm. Siewierz, gm. Zawiercie, m. Bielsko-Biała, m. Bieruń, m. Bytom, m. Częstochowa, m. Dąbrowa Górnicza, m. Gliwice, m. Jastrzębie-Zdrój, m. Katowice, m. Knurów, m. Lubliniec, m. Orzesze, m. Rybnik, m. Siemianowice Śląskie, m. Sławków, m. Sosnowiec, m. Tychy, m. Zabrze, m. Zawiercie, m. Żory.

13. The profile of regional economy of Świętokrzyskie voivodship

Świętokrzyskie voivodship is situated in the central part of Poland near large urban agglomerations: Kraków, Warszawa 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 Kielce University of Technology 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 tourism (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 Buskowianka), sulphuric waters (Busko-Zdrój),
- favourable conditions for the development of food industry,
- rich mineral springs of therapeutically waters and a well-developed base of treatment facilities and sanatoria, recreation establishments, hotels and guest houses,
- the presence of quite well-developed branches of industry – smelting industry represented by Celsa Ostrowiec Steelworks (Ostrowiec Świętokrzyski), manufacture of metallic products (Skarżysko-Kamienna), manufacture of machinery and equipment (Starachowice), manufacture of construction materials (Kielce), manufacture of ceramics, founding industry (Stąporków, Końskie), power industry (Połaniec).

The general characteristics of the region are presented in Table 1.

Table 1. General characteristics of the economy of Świętokrzyskie voivodship

Feature	Świętokrzyskie voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	28,134	37,096	-
Population (persons) on 31 December 2012	1,273,995	38,533,299	3.3
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	13,991	484,999	2.9
Secondary schools graduates (persons) in 2012	15,978	421,317	3.8
Number of employed persons on 31 December 2012	462,764	13,911,203	3.3
Structure of employed persons 2012	agriculture 32.4% industry 23.7% services 43.9%	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	1,035.7	73,704.4	1.4
Capital of companies (PLN m) in 2011	2,683	194,160.6	1.4
Special economic zones (SEZs) in the voivodship*			
– Starachowice SEZ, subzone: gm. Końskie, gm. Morawica, gm. Piekoszów, gm. Sędziszów, gm. Stąporków, gm. Suchedniów, m, Kielce, m, Ostrowiec Świętokrzyski, m, Skarżysko-Kamienna, m, Starachowice – Tarnobrzeg SEZ, subzone: gm. Połaniec, gm. Staszów, gm. Tuczępy			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2			
Real investment attractiveness RAI			
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			

Counties	Class A	Kielce
	Class B	
Communes	Class A	Sitkówka-Nowiny (2), Ostrowiec Świętokrzyski (1), Skarżysko-Kamienna (1), Starachowice (1), Kielce (1), Sandomierz (1), Połaniec (3)
	Class B	Miedziana Góra (2), Morawica (2), Strawczyn (2), Solec-Zdrój (2), Ożarów (3), Staszów (3)

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Świętokrzyskie voivodship made a contribution of 2.5 % to the GDP of Poland. Calculated per capita, it amounted to PLN 28,134 with the average for Poland PLN 37,096. With this result the voivodship takes the second place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 159.8% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (43.9%) whereas shares of the agricultural and industrial sectors are respectively 32.4% and 23.7% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 1,273,995 (as of 2013), which is 3.3% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 17.6% of the population at pre-productive age, 63.2% at productive age and 19.2% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 15.6% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3210.4, which is 85.1% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 15 higher education institutions in which there are 39 thousand students studying, which makes up 2.3% of all students in Poland. Moreover, 3.1% of the secondary school students in the voivodship attend vocational schools and 3.9% attend technical schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: electro-machinery industry, automotive industry, electronics, agri-food industry, construction materials industry, construction, mining of mineral resources.

Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following special economic zones:

- Starachowice SEZ, subzone: gm. Końskie, gm. Morawica, gm. Piekoszów, gm. Sędziszów, gm. Stąporków, gm. Suchedniów, m, Kielce, m, Ostrowiec Świętokrzyski, m, Skarżysko-Kamienna, m, Starachowice,
- Tarnobrzeg SEZ, subzone: gm. Połaniec, gm. Staszów, gm. Tuczępy.

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 planned A1 and Via Baltica routes that 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 general characteristics of the voivodship are presented in Table 1.

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

Feature	Warmian-Masurian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	27,228	37096	-
Population (persons) on 31 December 2012	1,450,697	38533299	3.8%
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	15,036	484,999	3.1
Secondary schools graduates (persons) in 2012	16,300	421,317	3.9
Number of employed persons on 31 December 2012	422,880	13,911,203	3.0
Structure of employed persons 2012	agriculture 16.5% industry 29.9% services 53.6%	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	309.8	73,704.4	0.4
Capital of companies (PLN m) in 2011	1,653	194,160.6	0.9
Special economic zones (SEZs) in the voivodship*			
– Suwałki SEZ, subzone: m. Ełk, gm. Gołdap – Warmian-Masurian SEZ, subzone: gm. Barczewo, gm. Bartoszyce, gm. Dobre Miasto, gm. Iłowo-Osada, gm. Morąg, gm. Nidzica, gm. Olecko, gm. Olsztynek, gm. Orzysz, gm. Pasłęk, gm. Piecki, gm. Pisz, gm. Szczytno, gm. Wielbark, m. Bartoszyce, m. Elbląg, m. Iława, m. Lidzbark Warmiński, m. Mrągowo, m. Nowe Miasto Lubawskie, m. Olsztyn, m. Ostróda			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	Tourism Class C		
Real investment attractiveness RAI			
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	Elbląg, Olsztyn	
Counties	Class B		
Communes	Class A	Działdowo (1), Iława (1), Lubawa (1), Ostróda (1), Elbląg (1), Ełk (1), Giżycko (1), Bartoszyce (1), Górowo Iławeckie (1), Kętrzyn (1), Lidzbark Warmiński (1), Mrągowo (1), Stawiguda (2), Szczytno (1), Olsztyn (1)	

	Class B	Braniewo (1), Nowe Miasto Lubawskie (1), Olecko (3), Gołdap (3), Węgorzewo (3), Mikołajki (3), Nidzica (3), Biskupiec (3), Dywity (2)

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Warmian-Masurian voivodship made a contribution of 2.7 % to the GDP of Poland. Calculated per capita, it amounted to PLN 27,228 with the average for Poland PLN 37,096. With this result the voivodship takes the 13th place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 157% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (53.6%) whereas shares of the agricultural and industrial sectors are respectively 16.5% and 29.9% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 1,450,697 (as of 2013), which is 3.8% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 19.3% of the population at pre-productive age, 65% at productive age and 15.7% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 20.4% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3045.3, which is 80.8% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 9 higher education institutions in which there are 45 thousand students studying, which makes up 2.7% of all students in Poland. Moreover, 4.4% of the secondary school students in the voivodship attend vocational schools and 4% attend technical schools.

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

Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following special economic zones:

- Suwałki SEZ, subzone: m. Ełk, gm. Gołdap,
- Warmian-Masurian SEZ, subzone: gm. Barczewo, gm. Bartoszyce, gm. Dobre Miasto, gm. Iłowo-Osada, gm. Morąg, gm. Nidzica, gm. Olecko, gm. Olsztynek, gm. Orzysz, gm. Pasłęk, gm. Piecki, gm. Pisz, gm. Szczytno, gm. Wielbark, m. Bartoszyce, m. Elbląg, m. Iława, m. Lidzbark Warmiński, m. Mrągowo, m. Nowe Miasto Lubawskie, m. Olsztyn, m. Ostróda.

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, 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 University, 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 (domestic and international airport) and water connections (the Oder waterway),

Poznań, one of Poland's oldest and largest cities, is a historical capital of the region of Greater Poland and an important centre of industry, trade, culture, higher education and research, and also belongs to the leading Polish cities in economic terms.

The general characteristics of the voivodship are presented in Table 1.

Table 1. General characteristics of the economy of Greater Poland voivodship

Feature	Greater Poland voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	38,629	37,096	-
Population (persons) on 31 December 2012	3,462,196	38,533,299	9
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	44,203	484,999	9.1
Secondary schools graduates (persons) in 2012	40,493	421,317	9.6
Number of employed persons on 31 December 2012	1,350,237	13911,203	9.7
Structure of employed persons 2012	agriculture 15.7% industry 31.8% services 52.5%	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			

<table>
<tr><td>Investment outlays (PLN m) in 2011</td><td>6,835.9</td><td>73,704.4</td><td>9.3</td></tr>
<tr><td>Capital of companies (PLN m) in 2011</td><td>15,988.8</td><td>194,160.6</td><td>8.2</td></tr>
<tr><td colspan="4">Special economic zones (SEZs) in the voivodship*</td></tr>
<tr><td colspan="4">– Kamienna Góra SEZ, subzone: m. Ostrów Wielkopolski
– Kostrzyn-Słubice SEZ, subzone: gm. Buk, gm. Chodzież, gm. Krobia, gm. Nowy Tomyśl, gm. Przemęt, gm. Stęszew, gm. Swarzędz, gm. Wronki, m. Poznań
– Łódź SEZ, subzone: gm. Nowe Skalmierzyce, gm. Opatówek, gm. Ostrzeszów, gm. Przykona, gm. Słupca, m. Kalisz, m. Koło, m. Turek
– Pomeranian SEZ, subzone: m. Piła
– Wałbrzych SEZ, subzone: gm. Jarocin, m. Kalisz, gm. Kościan, gm. Krotoszyn, m. Leszno, gm. Rawicz, gm. Śrem, gm. Września</td></tr>
<tr><td colspan="4">Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)</td></tr>
<tr><td colspan="2">Potential investment attractiveness PAI_2</td><td colspan="2">National economy Class B
Przemysł kapitałochłonny Class B
Labour-intensive industry Class C
Trade Class C
Tourism Class C
Education Class B</td></tr>
<tr><td colspan="2">Real investment attractiveness RAI</td><td colspan="2">National economy Class C
Industry Class C
Trade Class A</td></tr>
</table>

<table>
<tr><td colspan="3">Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)</td></tr>
<tr><td rowspan="2">Counties</td><td>Class A</td><td>Kalisz, Konin, Leszno, Poznań, Poznań (city)</td></tr>
<tr><td>Class B</td><td></td></tr>
<tr><td rowspan="2">Communes</td><td>Class A</td><td>Kępno (3), Ostrów Wielkopolski (1), Kalisz (1), Gniezno (1), Koło (1), Kleczew (3), Słupca (1), Turek (1), Przykona (2), Konin (1), Gostyń (3), Grodzisk Wielkopolski (3), Kościan (1), Leszno (1), Chodzież (1), Czarnków (1), Piła (1), Wągrowiec (1), Złotów (1), Luboń (1), Puszczykowo (1), Buk (3), Czerwonak (2), Dopiewo (2), Kleszczewo (2), Komorniki (2), Kórnik (3), Rokietnica (2), Suchy Las (2), Swarzędz (3), Tarnowo Podgórne (2), Środa Wielkopolska (3), Śrem (3), Poznań (1)</td></tr>
<tr><td>Class B</td><td>Jarocin (3), Baranów (2), Krotoszyn (3), Ostrzeszów (3), Łubowo (2), Kazimierz Biskupi (2), Powidz (2), Kościan (2), Międzychód (3), Nowy Tomyśl (3), Opalenica (3), Rawicz (3), Wolsztyn (3), Budzyń (2), Chodzież (2), Margonin (3), Ujście (3), Oborniki (3), Kostrzyn (3), Mosina (3), Murowana Goślina (3), Pobiedziska (3), Stęszew (3), Pniewy (3), Szamotuły (3)</td></tr>
</table>

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for *gmina* – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Greater Poland voivodship made a contribution of 9.3 % to the GDP of Poland. Calculated per capita, it amounted to PLN 38,629 with the average for Poland PLN 37,096. With this result the voivodship takes the second place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 169.5% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (52.5%) whereas shares of the agricultural and industrial sectors are respectively 15.7% and 31.8% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 3,462,196 (as of 2013), which is 9% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 19.4% of the population at pre-productive age, 64.1% at productive age and 16.5% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 9.5% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3435.1, which is 91.1% of the average for Poland.

The main potential for human capital creation in the voivodship lies in 40 higher education institutions in which there are 153 thousand students studying, which makes up 9.1% of all students in Poland. Moreover, 12.4% of the secondary school students in the voivodship attend vocational schools and 9.1% attend technical 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

Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following special economic zones:

- Kamienna Góra SEZ, subzone: m. Ostrów Wielkopolski,
- Kostrzyn-Słubice SEZ, subzone: gm. Buk, gm. Chodzież, gm. Krobia, gm. Nowy Tomyśl, gm. Przemęt, gm. Stęszew, gm. Swarzędz, gm. Wronki, m. Poznań,
- Łódź SEZ, subzone: gm. Nowe Skalmierzyce, gm. Opatówek, gm. Ostrzeszów, gm. Przykona, gm. Słupca, m. Kalisz, m. Koło, m. Turek,
- Pomeranian SEZ, subzone: m. Piła,
- Wałbrzych SEZ, subzone: gm. Jarocin, m. Kalisz, gm. Kościan, gm. Krotoszyn, m. Leszno, gm. Rawicz, gm. Śrem, gm. Września.

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:

- 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,
- voivodship's rich traditions connected with maritime economy (the manufacture of vessels, fishery, coastal tourism),
- the fact that 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, Wałeckie and Drawskie 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.
-

The general characteristics of the voivodship are presented in Table 1.

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

Feature	Western Pomeranian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2010. (PLN/person)	32,268	37,096	-
Population (persons) on 31 December 2012	1,721,405	38,533,299	4.5
Human Resources Potential			
Higher education institutions graduates (persons) in 2012	17,336	484,999	3.6
Secondary schools graduates (persons) in 2012	16,559	421,317	3.9
Number of employed persons on 31 December 2012	511,273	13,911,203	3.7
Structure of employed persons 2012	agriculture 9.7% industry 27.2% services 63.1 %	agriculture 17.1% industry 27.4% services 55.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2011	1,824.7	73,704.4	2.5

Capital of companies (PLN m) in 2011	4,439.1	194,160.6	2.3

Special economic zones (SEZs) in the voivodship*
– Kostrzyn-Słubice SEZ, subzone: gm. Barlinek, gm. Goleniów, gm. Gryfino, gm. Karlino, gm. Łobez, gm. Police, m. Białogard – Mielec SEZ, subzone: m. Szczecin – Pomeranian SEZ, subzone: m. Stargard Szczeciński – Słupsk SEZ, subzone: gm. Biesiekierz, gm. Kalisz Pomorski, gm. Karlino, gm. Polanów, gm. Tychowo, m. Koszalin, m. Szczecinek, m. Ustka, m. Wałcz

Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)	
Potential investment attractiveness PAI_2	Labour-intensive industry Class C Trade Class C Tourism Class A
Real investment attractiveness RAI	National economy Class C Professional, science and technical activities Class C

Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)		
Counties	Class A	Kołobrzeg, Koszalin, Szczecin, Police, Świnoujście
	Class B	
Communes	Class A	Białogard (1), Drawsko Pomorskie (3), Kołobrzeg (1), Kołobrzeg (2), Ustronie Morskie (2), Mielno (2), Darłowo (1), Sławno (1), Szczecinek (1), Świdwin (1), Wałcz (1), Koszalin (1), Rewal (2), Stargard Szczeciński (1), Szczecin (1), Stepnica (2), Gryfino (3), Dziwnów (3), Międzyzdroje (3), Dobra (Szczecińska) (2), Kołbaskowo (2), Nowe Warpno (3), Police (3), Świnoujście (1)
	Class B	Kalisz Pomorski (3), Złocieniec (3), Biesiekierz (2), Sianów (3), Świeszyno (2), Biały Bór (3), Borne Sulinowo (3), Choszczno (3), Trzebiatów (3), Barlinek (3), Dębno (3), Kobylanka (2), Goleniów (3), Nowogard (3), Kamień Pomorski (3)

Source: Authors' own calculations.

* On the above list and further in the report *gm.* is a Polish abbreviation for – commune and *m.* is an abbreviation for *miasto* – city. If there is information *city* following the name of the county, it indicates a commune which has a status of a city and carries out county's tasks is mentioned (a city county). Otherwise the counties include more than one commune (land counties).

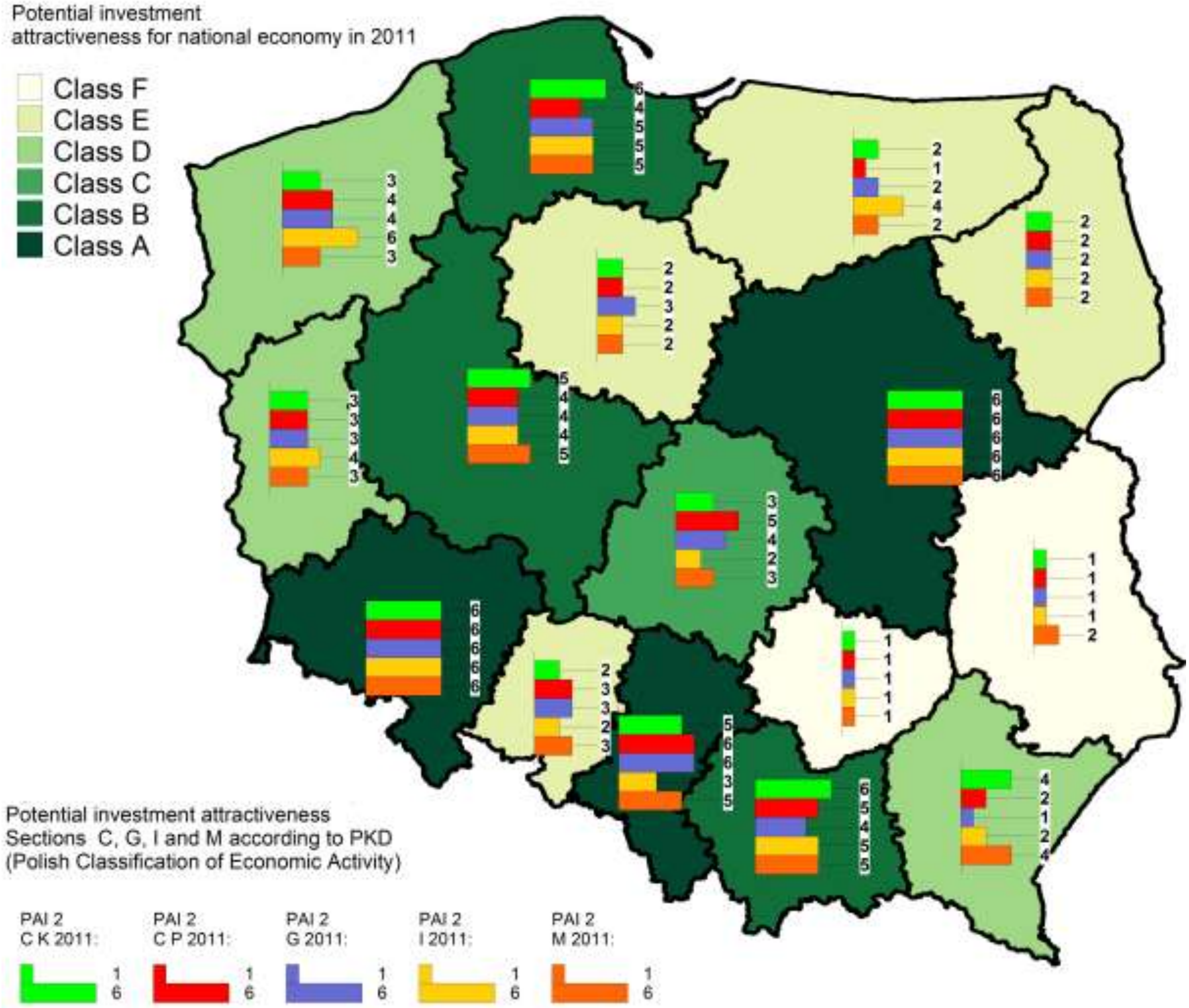
Additional information: (1) – urban commune, (2) – rural commune, (3) – urban-rural commune.

In 2010 Western Pomeranian voivodship made a contribution of 3.9 % to the GDP of Poland. Calculated per capita, it amounted to PLN 32,268 with the average for Poland PLN 37,096. With this result the voivodship takes the seventh place in the country. The GDP growth rate in the voivodship in the years 2003-2010 amounted to 155.9% while the average for Poland amounted to 168%. In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (63.1%) whereas shares of the agricultural and industrial sectors are respectively 9.7% and 27.2% (Central Statistical Office, Regional Data Bank 2013).

The number of inhabitants of the voivodship amounts to 1,721 405 (as of 2013), which is 4.5% of the population of Poland. The age structure in the voivodship in 2012 was as follows: 17.9% of the population at pre-productive age, 65% at productive age and 17.1% at post-productive age (for Poland it was 18.3%, 63.9% and 17.8% respectively). The registered unemployment rate in the voivodship amounted to 16.6% in August 2013, compared to 13% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2013 amounted to PLN 3420.3, which is 90.7% of the average for Poland.

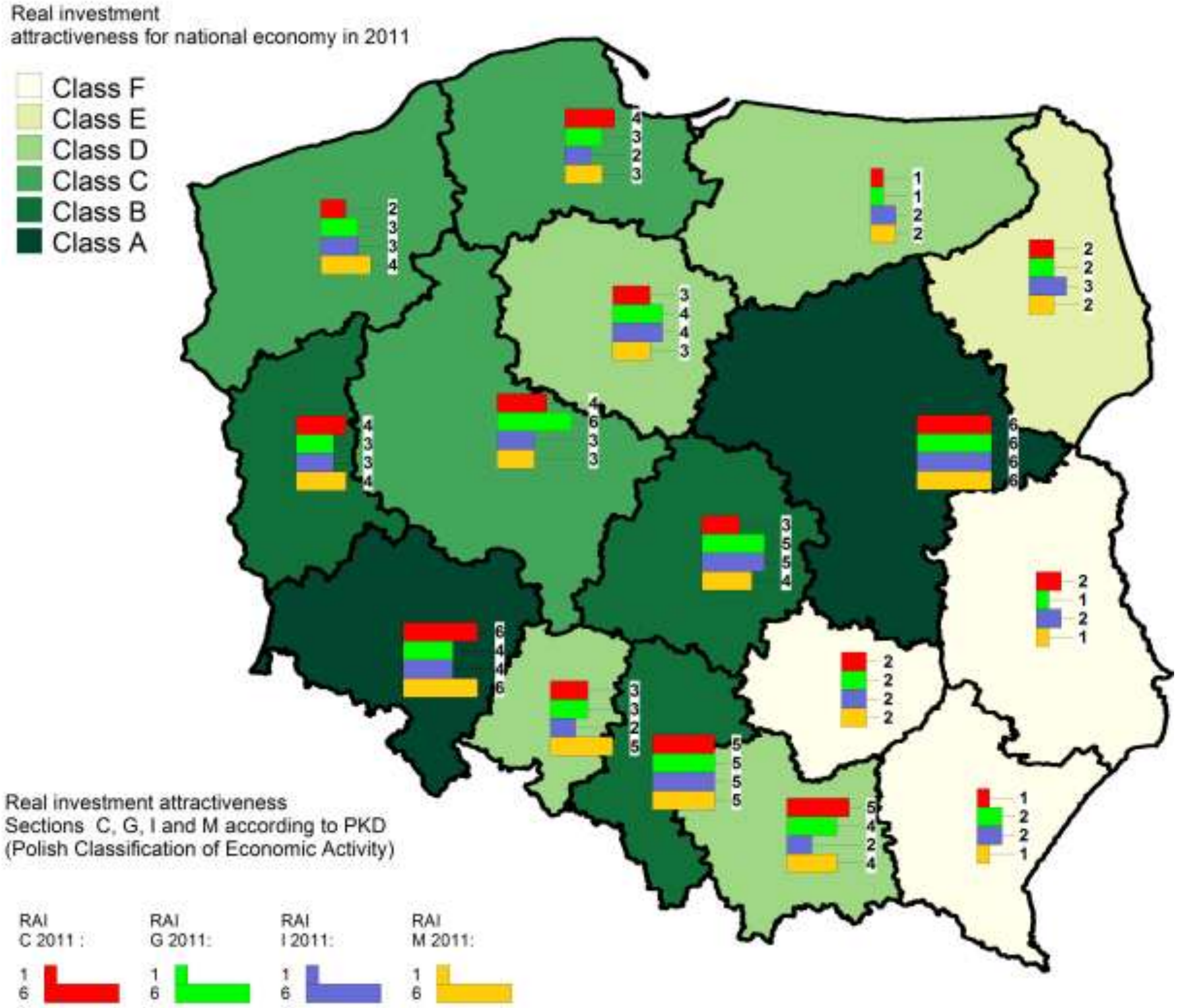
APPENDIX

Chart 1. Potential investment attractiveness of Polish voivodships by basic sections of the national economy



Source: Authors' own materials based on the research.

Chart 2. Real investment attractiveness of Polish voivodships by basic sections of the national economy



Source: Authors' own materials based on the research.

Table 1. List of investment attractiveness indices for voivodships

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

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

Table 2. Potential investment attractiveness of Polish voivodships according to the EU potential investment attractiveness index PAI _UE in 2011

	Microclimate Human Capital	Microclimate Market	Microclimate Innovativenes s	Composite index
Lower Silesian	B	D	D	D
Kuyavian-Pomeranian	B	E	F	E
Lublin	B	F	E	F
Lubusz	A	F	E	E
Łódź	A	E	E	E
Lesser Poland	C	E	E	E
Mazovian	A	C	B	B
Opole	C	F	E	F
Subcarpathian	C	F	E	F
Podlaskie	B	F	E	F
Pomeranian	B	D	D	D
Silesian	B	D	E	D

Świętokrzyskie	A	F	F	F
Warmian-Masurian	B	F	E	F
Greater Poland	A	E	E	E
Western Pomeranian	C	E	E	E

Source: Authors' own materials based on calculations of H. Godlewska-Majkowska and M. Czernecki, made in the course of statutory research *Investment attractiveness and enterprise localization in the global economy* (the team: H. Godlewska-Majkowska, Ph.D., university professor at the Warsaw School of Economics – head of research, P. Bartoszczuk, Ph.D., P. Zarębski, Ph.D., M. Typa, M.A., M. Czernecki, M.A.).