CENTRE FOR REGIONAL
AND LOCAL ANALYSES

REGIONAL INVESTMENT ATTRACTIVENESS 2013

Greater Poland voivodship

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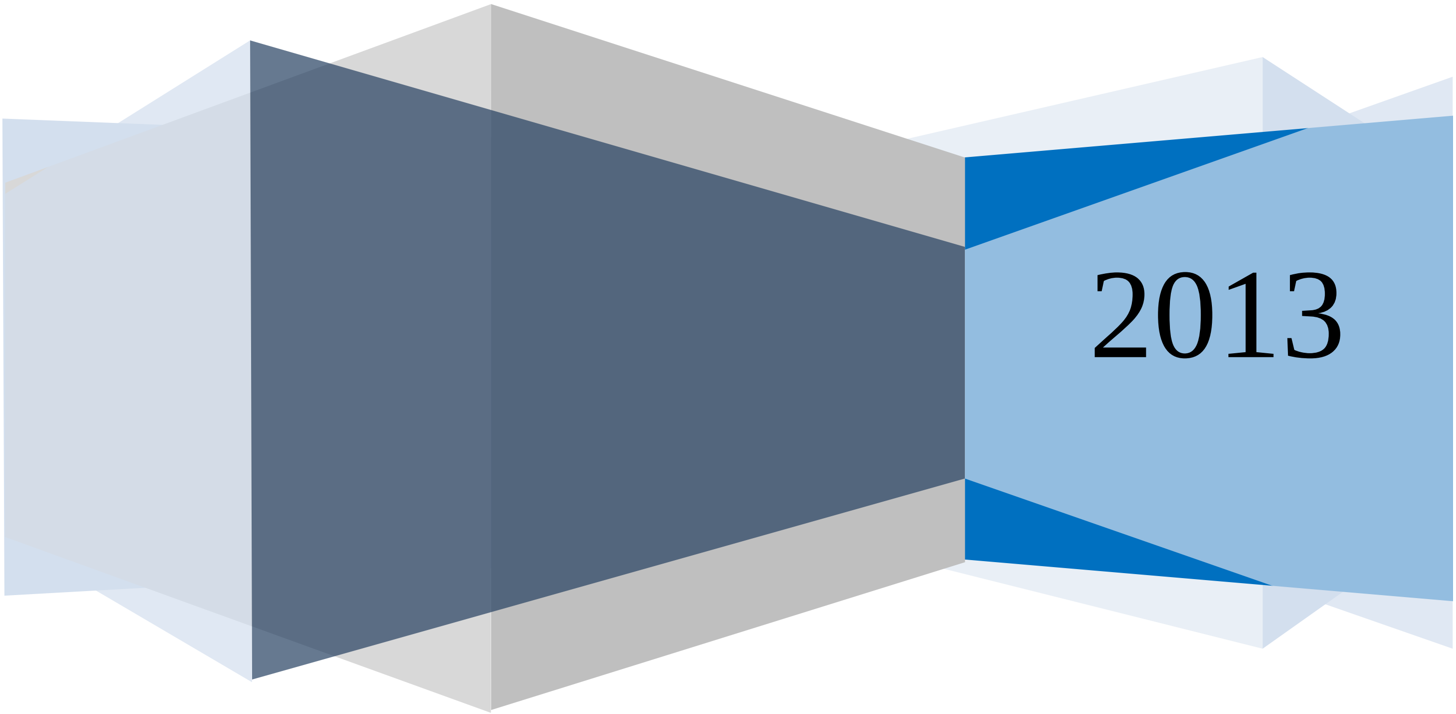


Warsaw, October 2013

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 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			

Investment outlays (PLN m) in 2011	6,835.9	73,704.4	9.3
Capital of companies (PLN m) in 2011	15,988.8	194,160.6	8.2

Special economic zones (SEZs) in the voivodship*

- 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

Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)

Potential investment attractiveness PAI_2	National economy Class B Przemysł kapitałochłonny Class B Labour-intensive industry Class C Trade Class C Tourism Class C Education Class B
Real investment attractiveness RAI	National economy Class C Industry Class C Trade Class A

Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)

Counties	Class A	Kalisz, Konin, Leszno, Poznań, Poznań (city)
	Class B	
Communes	Class A	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)
	Class B	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)

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.

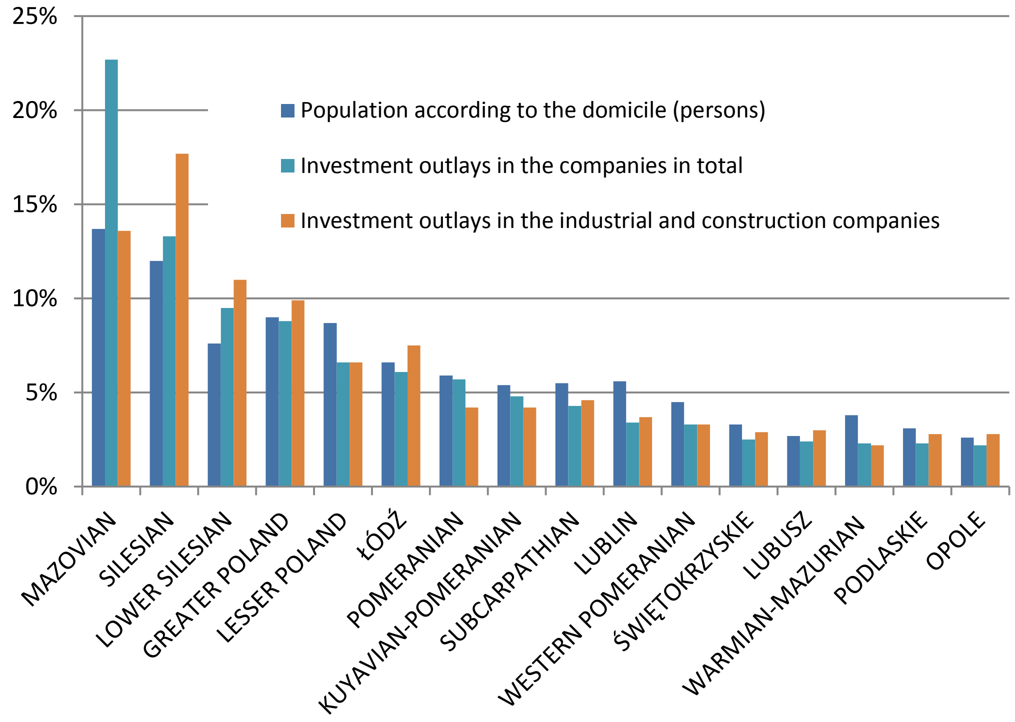
2. Region's rank in terms of investment attractiveness in Poland and in the European Union

Greater Poland voivodship is characterised by a high level of overall investment attractiveness, which is indicated by the high rank (class B) according to the main potential investment attractiveness index calculated for the whole regional economy PAI 2_GN (see Chart 1 in the Appendix). The region was also ranked very high in terms of potential investment attractiveness for the sections: capital-intensive industry (class B), labour-intensive industry (class C), trade and repair (class C), tourism (class C), professional, science and technical activities (class C).[1]

Investment attractiveness can also be evaluated on the basis of indices of real investment attractiveness (RAI), which are based on microclimates such as: return on tangible assets, labour productivity, self-financing of self-government territorial units and investment outlays. The region was ranked above the average in terms of RAI indices for the national economy (class C), industry (class C), and trade and repairs (class A) - see Table 2 in the Appendix.

Potential and real investment attractiveness is reflected in the decisions of investors on business location. This is shown in Chart 1.

Chart 1. Regional structure of investment outlays in the companies in 2011 in comparison with the share in the country's population



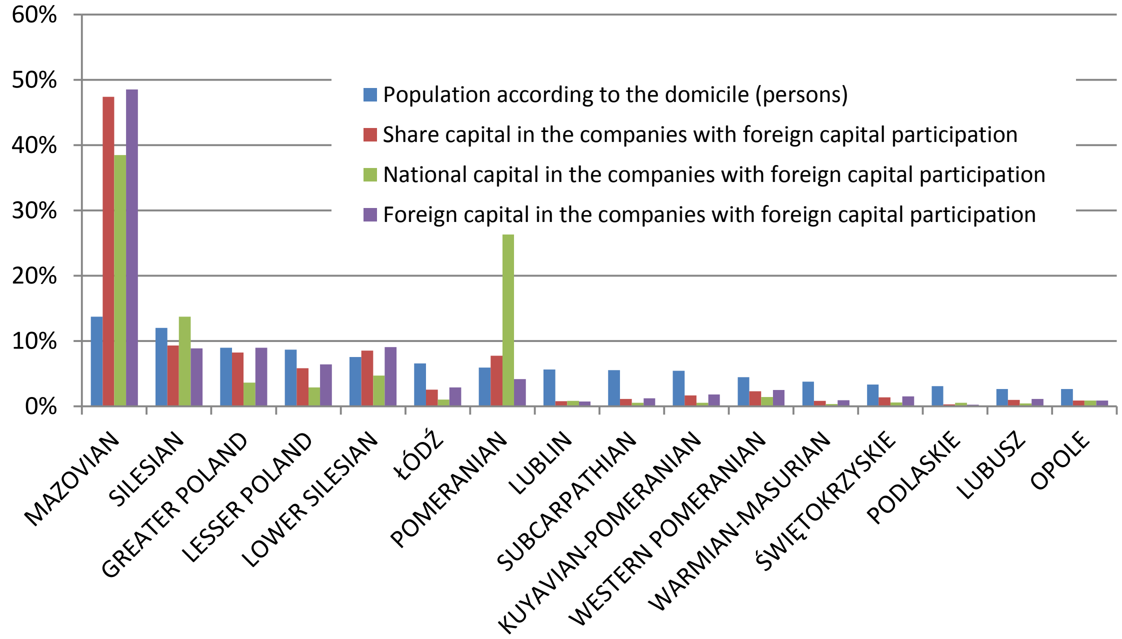
Note: these are the most up-to-date data.

[1] Section C – manufacturing industry, section G – trade and repair, section I – hotels and restaurants, section M – professional, scientific and technical activities. Methodological description of calculation of investment attractiveness of Polish regions, counties and communes can be found on the website of Institute of Entrepreneurship, Collegium of Business and Administration, Warsaw School of Economics: http://kolegia.sgh.waw.pl/pl/KNoP/struktura/IP/publikacje

Source: Authors on the basis of the Local Data Bank (downloaded 13 November 2013).

In 2011 Greater Poland region took the third place in Poland in terms of accumulated share capital in the companies with foreign capital participation (an 8.8% share of its total value in all voivodships), while its share in Poland's population was 9%. Thus, the region's share in the companies' investment outlays was adequate to its share in country's population. This share was higher when it comes to industry and construction enterprises (9.9%) because of the region's industrial specialization.

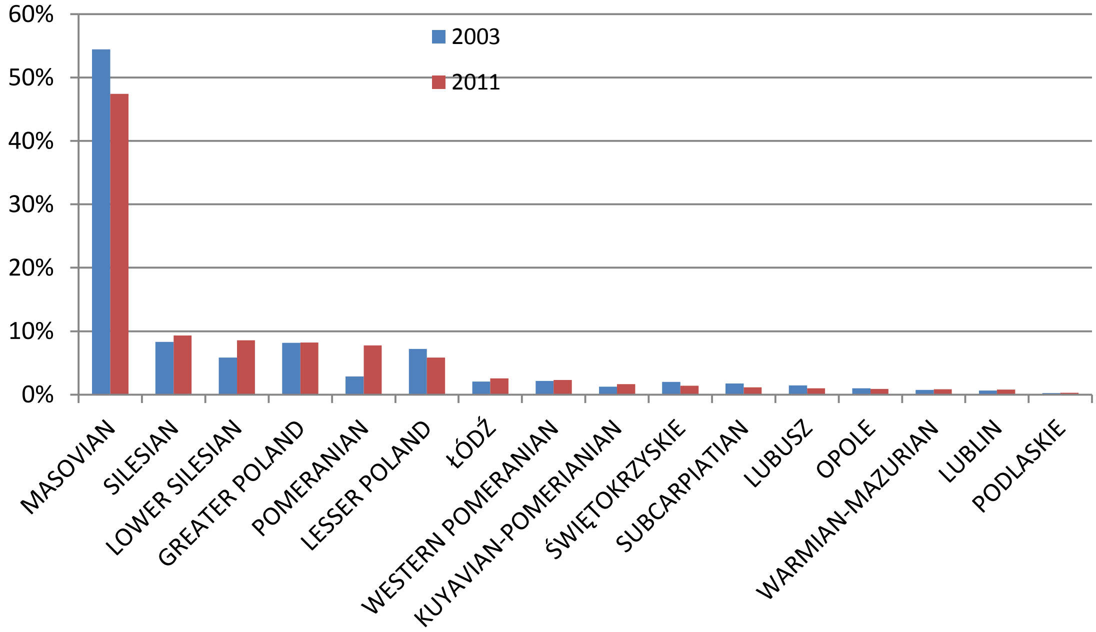
Chart 2. Regional structure of capital in the companies with foreign capital participation in comparison with a share in population



Note: These are the most up-to-date data.
Source: Authors on the basis of the Local Data Bank (downloaded 13 November 2013).

The voivodship's share in the total value of share capital of companies with foreign capital in Poland is 8.2%, of which the most is foreign capital. It is slightly too little in comparison to the voivodship's 9% share in Poland's population. This applies mainly to domestic capital. In the years 2003-2011 the voivodship slightly increased its competitive position on the market of foreign direct investments – the Greater Poland's share in the total value of share capital of companies with foreign capital rose from 8.18% to 8.23% - see Chart 3.

Chart 3. Regional competitive rank in terms of investments with foreign capital participation according to the value of share capital in the companies with foreign capital participation in 2003 and 2011 (% of total value for Poland)



Source: Authors on the basis of the Local Data Bank (downloaded 13 November 2013).

An opportunity for Greater Poland voivodship might be investment sites thoroughly prepared by self-government territorial units, utilizing their location advantages.

Greater Poland voivodship is concerned as a potential business localization in comparison with the other European regions. When it comes to innovativeness, market and human capital factors, the voivodship took the 223rd place of 270 regions in the EU and was ranked Class E – see Table 2 in the Appendix.

The voivodship has competitive advantage when it comes to human capital, ranked class A. It is more attractive than regions like: **in Italy**: Sardegna, Sicilia, Puglia, Basilicata, Calabria; **in Greece**: Ionia Nisia, Ipeiros, Dytiki Ellada, Anatoliki Makedonia, Thraki, Sterea Ellada, Voreio Aigaio, Dytiki Makedonia, Peloponnisos; **in France:** Picardie, Poitou-Charentes; **in Portugal:** Algarve, Norte, Alentejo, Região Autónoma dos Açores i Centro (PT); **in Spain**: Extremadura; **in Portugal**: Dél-Dunántúl, Észak-Magyarország, Dél-Alföld; Észak-Alföld; **in Slovakia:** Západné Slovensko, Stredné Slovensko, Východné Slovensko; **in Bulgaria**: Severoiztochen, Severen tsentralen, Yugoiztochen, Yuzhen tsentralen and Severozapaden; **in Romania**: Vest, Nord-Vest, Centru, Sud-Est, Sud-Vest Oltenia, Nord-Est and Sud – Muntenia.

3. Internal diversification of regional investment attractiveness

Counties

The following counties are considered the most attractive in Greater Poland voivodship: Kalisz, Konin, Leszno, poznański, Poznań (city) – see Table 2.

Table 2. Potential investment attractiveness of counties of Greater Poland voivodship for the national economy and selected sections

County	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
Poznań (city)	0.360	A	A	A	A	A
Leszno	0.353	A	A	A	B	A
Konin	0.323	A	A	A	A	A
Poznań	0.302	A	A	A	A	A
Kalisz	0.292	A	B	A	C	A
Turek	0.261	C	C	C	D	C
Piła	0.256	C	C	C	C	C
Środa Wielkopolska	0.255	C	C	C	C	C
Chodzież	0.249	C	C	C	D	C
Śrem	0.244	C	C	C	D	C
Nowy Tomyśl	0.243	C	C	C	C	D
Grodzisk Wielkopolski	0.243	C	C	C	D	D

Source: Authors' own calculations.

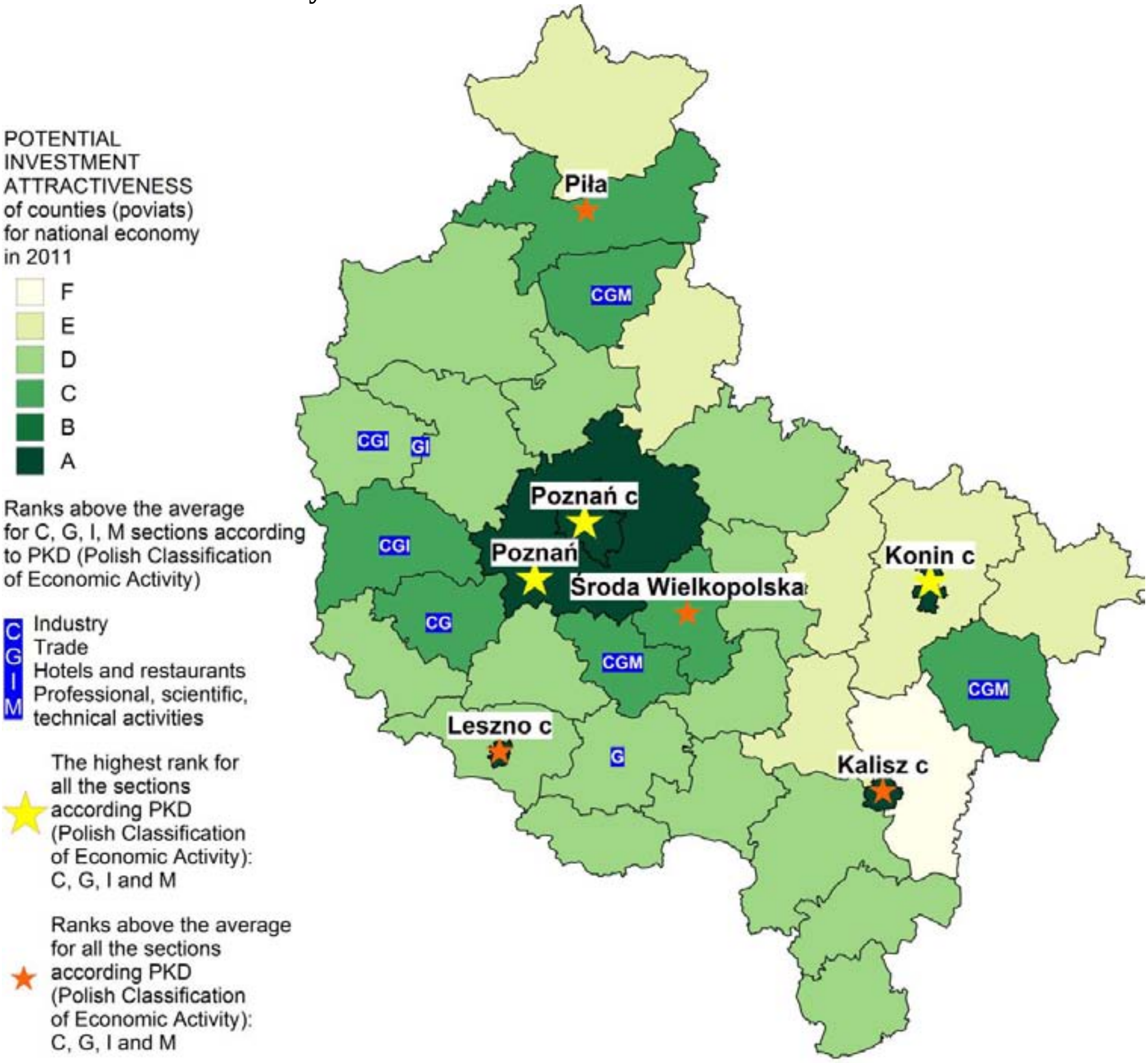
The counties mentioned above (beyond Turek, Piła, Środa Wielkopolska, Chodzież, Śrem, Nowy Tomyśl, Grodzisk Wielkopolski) are characterized by very high investment attractiveness. The following city counties should be distinguished: Poznań, Leszno, Konin and land county: Poznań as these units were ranked class A in their potential investment attractiveness for all sections of the national economy analysed in this research.

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

- Turek, Piła, Środa Wielkopolska, Chodzież, Śrem, Nowy Tomyśl, Grodzisk Wielkopolski, Międzychód (Class C) for section C,
- Turek, Piła, Środa Wielkopolska, Chodzież, Śrem, Nowy Tomyśl, Grodzisk Wielkopolski, Międzychód, Gostyń, Szamotuły (Class C) for section G,
- Kalisz, Piła, Środa Wielkopolska, Nowy Tomyśl, Międzychód, Szamotuły (Class C) for section I,
- Turek, Piła, Środa Wielkopolska, Chodzież, Śrem for section M.

Synthetic evaluation of potential investment attractiveness of counties of Świętokrzyskie voivodship is presented in Chart 4.

Chart 4. Potential investment attractiveness of counties of Greater Poland voivodship for the national economy and selected sections



Source: Authors' own materials.
Note: "c" stands for city county.

Communes

Like counties, the Greater Poland communes are also very much diversified in terms of investment attractiveness. The highest ranked communes are: 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). It is also reflected in their high ranks (class A or B) for all the analysed sections – see Table 3.

Table 3. Potential investment attractiveness of communes of Greater Poland voivodship for the national economy and selected sections

Commune	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
Tarnowo Podgórne (2)	0.276	A	A	A	A	A
Turek (1)	0.275	A	A	A	C	A
Leszno (1)	0.274	A	A	A	B	A
Poznań (1)	0.272	A	A	A	A	A
Czarnków (1)	0.270	A	A	A	A	A
Chodzież (1)	0.269	A	A	A	B	A
Luboń (1)	0.266	A	A	A	B	A
Suchy Las (2)	0.266	A	A	A	A	A
Kościan (1)	0.265	A	A	A	D	A
Konin (1)	0.260	A	A	A	A	A
Piła (1)	0.260	A	A	A	A	A
Komorniki (2)	0.257	A	A	A	A	A
Ostrów Wielkopolski (1)	0.252	A	A	A	C	A
Wągrowiec (1)	0.252	A	A	A	B	A
Gniezno (1)	0.245	A	A	A	C	A
Dopiewo (2)	0.245	A	A	A	B	A
Kalisz (1)	0.243	A	A	A	C	A
Słupca (1)	0.240	A	A	A	C	A
Puszczykowo (1)	0.238	A	A	A	A	A
Swarzędz (3)	0.236	A	A	A	B	A
Koło (1)	0.230	A	A	A	C	A
Kleszczewo (2)	0.230	A	A	A	B	A
Przykona (2)	0.229	A	A	A	A	C
Kępno (3)	0.229	A	A	A	B	A
Złotów (1)	0.229	A	A	A	C	A
Czerwonak (2)	0.228	A	A	A	A	A
Rokietnica (2)	0.227	A	A	A	B	A
Buk (3)	0.226	A	A	B	C	A
Śrem (3)	0.226	A	A	A	B	A
Kleczew (3)	0.225	A	A	A	B	B
Kórnik (3)	0.224	A	A	A	A	A
Środa Wielkopolska (3)	0.224	A	A	A	C	A
Gostyń (3)	0.222	A	A	A	B	A
Grodzisk Wielkopolski (3)	0.219	A	A	B	B	B

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

Source: Authors' own calculations.

Attractive communes are also the class B communes according to the PAI1_GN index. Among these communes are: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). The location-specific advantages are also universal for these communes, which makes them attractive for all kinds of business activity concerned in this research.

However, this characteristic cannot be found in all of the communes that belong to Class C. Only a few Class C communes fulfil this condition: Czarna Białostocka (3), Brańsk (1), Mońki (3) – see Table 3 in the Appendix.

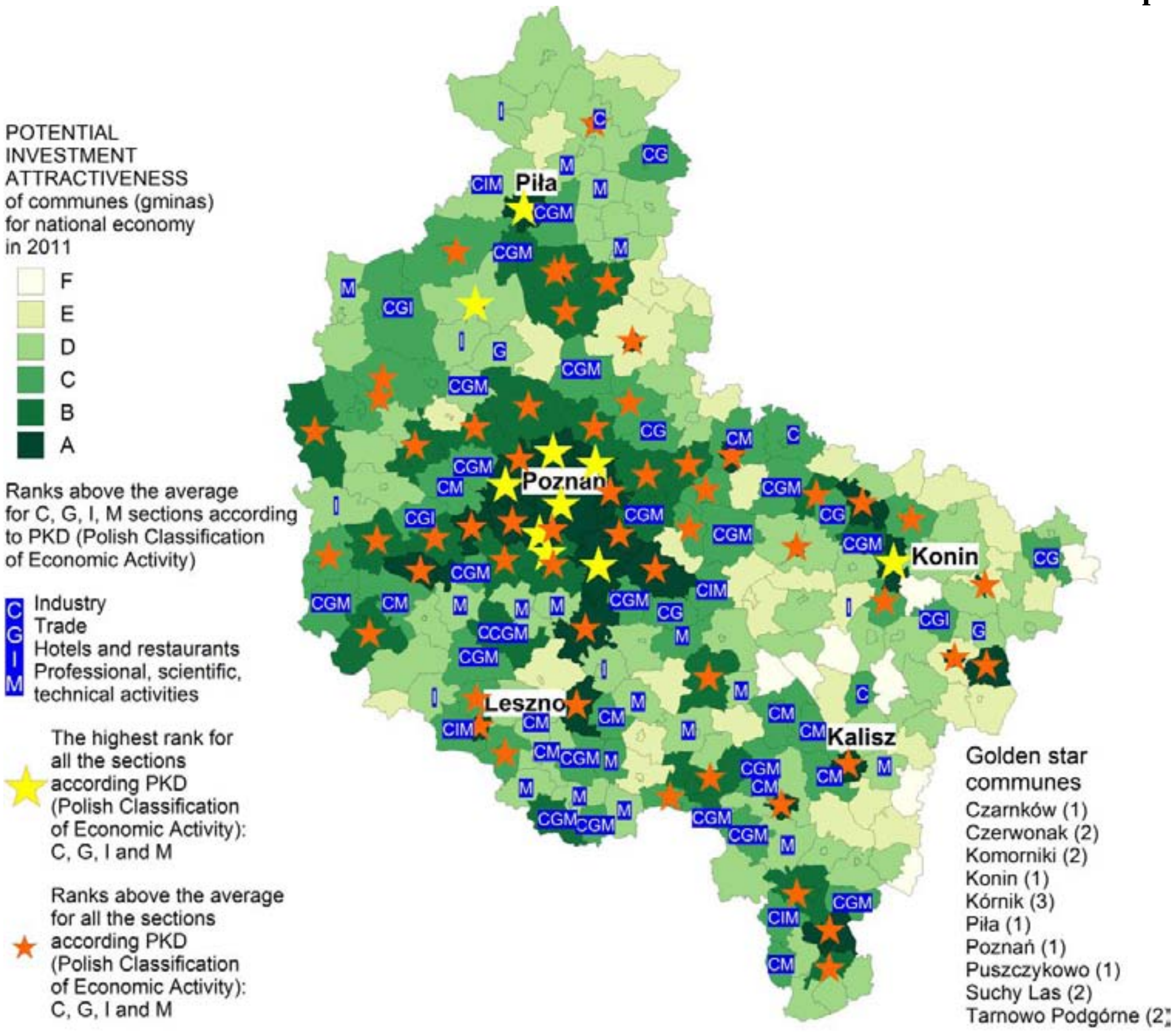
In reference to the particular sections taken into consideration in this research the following communes of Class C should be distinguished:

Stawiszyn (3), Perzów (2), Sulmierzyce (1), Zduny (3), Nowe Skalmierzyce (3), Odolanów (3), Ostrów Wielkopolski (2), Raszków (3), Doruchów (2), Kobyla Góra (2), Gołuchów (2), Pleszew (3), Czerniejewo (3), Gniezno (2), Kiszkowo (2), Łubowo (2), Trzemeszno (3), Witkowo (3), Kłodawa (3), Stare Miasto (2), Ślesin (3), Ostrowite (2), Władysławów (2), Miłosław (3), Nekla (3), Września (3), Krobia (3), Piaski (2), Poniec (3), Granowo (2), Rakoniewice (3), Śmigiel (3), Krzemieniewo (2), Lipno (2), Rydzyna (3), Święciechowa (2), Sieraków (3), Kuślin (2), Zbąszyń (3), Pakosław (2), Siedlec (2), Trzcianka (3), Kaczory (2), Łobżenica (3), Szydłowo (2), Skoki (3), Złotów (2), Rogoźno (3), Obrzycko (1), Duszniki (2), Kaźmierz (2), Wronki (3), Krzykosy (2), Zaniemyśl (2) - for section C,

- Sulmierzyce (1), Zduny (3), Odolanów (3), Raszków (3), Czerniejewo (3), Kiszkowo (2), Witkowo (3), Kłodawa (3), Kazimierz Biskupi (2), Stare Miasto (2), Ślesin (3), Ostrowite (2), Brudzew (2), Nekla (3), Września (3), Krobia (3), Granowo (2), Śmigiel (3), Lipno (2), Rydzyna (3), Sieraków (3), Kuślin (2), Opalenica (3), Zbąszyń (3), Pakosław (2), Siedlec (2), Budzyń (2), Połajewo (2), Trzcianka (3), Wieleń (3), Kaczory (2), Łobżenica (3), Ujście (3), Skoki (3), Rogoźno (3), Kostrzyn (3), Stęszew (3), Obrzycko (1), Kaźmierz (2), Wronki (3), Krzykosy (2), Zaniemyśl (2) - for section G,
- Jarocin (3), Baranów (2), Krotoszyn (3), Ostrów Wielkopolski (1), Kobyla Góra (2), Kalisz (1), Gniezno (1), Czerniejewo (3), Łubowo (2), Koło (1), Rzgów (2), Stare Miasto (2), Słupca (1), Turek (1), Władysławów (2), Nekla (3), Lipno (2), Rydzyna (3), Święciechowa (2), Włoszakowice (2), Międzychód (3), Kuślin (2), Opalenica (3), Wolsztyn (3), Margonin (3), Lubasz (2), Szydłowo (2), Skoki (3), Złotów (1), Jastrowie (3), Buk (3), Stęszew (3), Szamotuły (3), Środa Wielkopolska (3), Dolsk (3) - for section I,
- Kotlin (2), Opatówek (2), Baranów (2), Perzów (2), Sulmierzyce (1), Koźmin Wielkopolski (3), Nowe Skalmierzyce (3), Odolanów (3), Ostrów Wielkopolski (2), Przygodzice (2), Raszków (3), Doruchów (2), Kobyla Góra (2), Gołuchów (2), Pleszew (3), Czerniejewo (3), Gniezno (2), Witkowo (3), Stare Miasto (2), Ślesin (3), Powidz (2), Przykona (2), Miłosław (3), Nekla (3), Borek Wielkopolski (3), Krobia (3), Pępowo (2), Piaski (2), Poniec (3), Kamieniec (2), Rakoniewice (3), Czempiń (3), Śmigiel (3), Krzemieniewo (2), Lipno (2), Rydzyna (3), Święciechowa (2), Sieraków (3), Zbąszyń (3), Bojanowo (3), Jutrosin (3), Miejska Górka (3), Pakosław (2), Siedlec (2), Chodzież (2), Szamocin (3), Krzyż Wielkopolski (3), Szydłowo (2), Wysoka (3), Skoki (3), Krajenka (3), Rogoźno (3), Obrzycko (1), Duszniki (2), Kaźmierz (2), Wronki (3), Nowe Miasto nad Wartą (2), Brodnica (2) - for section M.

Synthetic evaluation of potential investment attractiveness of communes of Greater Poland voivodship is presented in Chart 5.

Chart 5. Potential investment attractiveness of communes of Greater Poland voivodship



Source: Authors' own calculations.

4. Voivodship's institutional support for investors and entrepreneurs

The development of business supporting institutions in a region is a vital component of its investment attractiveness. The institutions that support entrepreneurship, pro-investment solutions, research commercialization and enterprises' innovativeness are of special importance. Among the voivodship's business-supporting institutions that influence the voivodship's economic development the following ones should be mentioned (excluding scientific research institutions):

- chambers of commerce: Polska Izba Gospodarcza Importerów Eksporterów i Kooperacji in Poznań, Wielkopolska Izba Przemysłowo – Handlowa in Poznań, Wielkopolska Izba Budownictwa in Poznań, Wielkopolska Izba Turystyczna in Poznań, Wielkopolska Izba Rzemieślnicza in Poznań, Izba Przemysłowo-Handlowa Południowej Wielkopolski in Ostrów Wielkopolski, Krajowa Izba Producentów Drobiu i Pasz in Poznań, Polska Izba Gospodarcza Przemysłu Drzewnego in Poznań, Polska Izba Przemysłu Targowego in Poznań, Wielkopolska Izba Rolnicza in Poznań, Regionalna Wielkopolska Izba Rolno – Przemysłowa in Poznań, Wielkopolska Okręgowa Izba Inżynierów Budownictwa in Poznań, Izba Gospodarcza Północnej Wielkopolski in Piła, Wielkopolska Okręgowa Izba Architektów in Poznań,
- associations (including business centres): Wielkopolski Związek Pracodawców Prywatnych im. Cyryla Ratajskiego in Poznań, Wielkopolskie Zrzeszenie Handlu i Usług in Poznań, Stowarzyszenie „Ostrzeszowskie Centrum Przedsiębiorczości" Inkubator Przedsiębiorczości, Wielkopolskie Zrzeszenie Plantatorów Chmielu in Nowy Tomyśl,
- business incubators: Zespół Inkubatorów Wysokich Technologii Poznańskiego Parku Naukowo – Technologicznego Fundacji UAM, InQbator Technologiczny Poznańskiego Parku Naukowo – Technologicznego Fundacji UAM, Fundacja Kaliski Inkubator Przedsiębiorczości in Kalisz, Akademicki Inkubator Przedsiębiorczości przy Akademii Ekonomicznej in Poznań, Akademicki Inkubator Przedsiębiorczości przy Uniwersytecie im. A. Mickiewicza in Poznań,
- Technology parks, science parks, industrial parks: Poznański Park Naukowo – Technologiczny Fundacji Uniwersytetu im. Adama Mickiewicza, Poznański Park Technologiczno – Przemysłowy, Park Naukowo – Technologiczny Eureka Technology Park Sp. z o.o. Dąbrowa k/Poznania, Nickel Technology Park Poznań Sp. z o. o., Park Przemysłowy LUVENA Sp. z o.o. in Luboń,
- consulting centres (including personal consulting and agricultural consulting): Wielkopolski Ośrodek Doradztwa Rolniczego in Poznań,
- financial institutions (guarantee funds): Fundusz Rozwoju i Promocji Województwa Wielkopolskiego S.A. in Poznań, Polska Fundacja Przedsiębiorczości (oddziały: Poznań, Piła, Leszno),
- others: Centrum Innowacji, Rozwoju i Transferu Technologii Politechniki Poznańskiej, Wielkopolska Agencja Rozwoju Przedsiębiorczości Sp. z o.o. in Poznań, Agencja Rozwoju Regionalnego in Konin, Agencja Rozwoju Północnej Wielkopolski in Piła, Wielkopolski Klub Techniki i Racjonalizacji in Poznań, Cech Rzemiosł Różnych in Piła, Cech Rzemiosł Różnych w Kościanie, Cech Rzemiosł Metalowych, Elektrotechnicznych i Motoryzacyjnych in Poznań.

Polish Chamber of Importers, Exporters and Cooperation (*Polska Izba Gospodarcza Importerów, Eksporterów i Kooperacji)* **in Poznań** supports MSEs development by offering

IT, training and consulting services. The offer of proinnovative consulting services includes i.a. seeking for business partners (preparing information on selected foreign markets, on possibilities of entering the market and specifying the potential cooperants for the company), technology audits, technology transfer (preparing offers and technology inquiries, review of technology suppliers'/receivers' profiles and establishing contacts, assistance at contract preparation and technology implementation and monitoring), consulting on financing cluster initiatives and on vision, mission and development strategy of the cluster, matching (assessment of cooperation possibilities and organizing meetings with potential partners), exports audit. The chamber also offers information services on opening, running and closing a business and acquiring public funds for financing business activity. What is more, the offer includes consulting on seeking external sources of financing, exports development support (preparing exports development plan, consulting on entering foreign markets, financing exports) and consulting services for the new enterprises (choice of legal form, preparing business plan). The services also concern developing soft skills (communication, sales and customer service, negotiations, team building and team management, change management, presentations etc.). The chamber's services for the foreign investors include: advisory on choosing the best legal form of their business in Poland, help and assistance at registering the company, business location choice, organizing meetings with the representatives of self-governments, land owners and experts on law, taxes or recruitment. (http://www.pcc.org.pl/, 8 November 2013)

Greater Polish Association of Private Employers *(Wielkopolski Związek Pracodawców Prywatnych im. Cyryla Ratajskiego)* **in Poznań** aims at protecting rights and interests of its members against trade unions, public authorities, public administration and self-government administration. The association offers consulting services, coaching for managerial staff, organizes events and meetings such as „Move up" (presentations of successful innovative initiatives by their creators), „Information Days" (presentations of own business offers), seminars on raising financing for development from the EU funds. There are service packages for particular groups of enterprises (start-ups, MSEs, advanced entrepreneurs and scientists in business. (http://www.wzpp.org.pl/, 8 November 2013)

Poznań Technology and Research Park *(Poznański Park Naukowo – Technologiczny Fundacji Uniwersytetu im. Adama Mickiewicza***).** offers office, training, conference and laboratory spaces, services of a Virtual office, organisation of conferences, seminars, meetings and other events. Within the park the research centres are operating, offering services for entrepreneurs, territorial self-government units, public administration organs and scientists. The services include: analyses, technology studies, consultations, advisory, contract research, research cooperation. The services fields include: archaeology, geology, physics, psychology, sociology, economics, spatial economics, law, organization issues, PR and marketing for institutions and communes, linguistics, waste management, natural environment. Another unit of the park is Innovation Support Centre that offers services supporting economic activity and innovations. It offers individual consultations (concerning stages of technology transfer, sources of financing innovations and legal issues), matching partners for cooperation, technology audit, opinions on technology innovativeness (concerning new products and branches, evaluation of innovative ideas, evaluation of companies' competitive position, market segmentation). There is a Technology Incubator operating in the park supporting newly-opened innovative companies. The Park houses a complex of Hi-Tech Incubators, which include an office-laboratory complex for innovating businesses as well as a range of research and other services that support their development. There is also a kindergarten in the park. (www.ppnt.poznan.pl/, 8 November 2013)

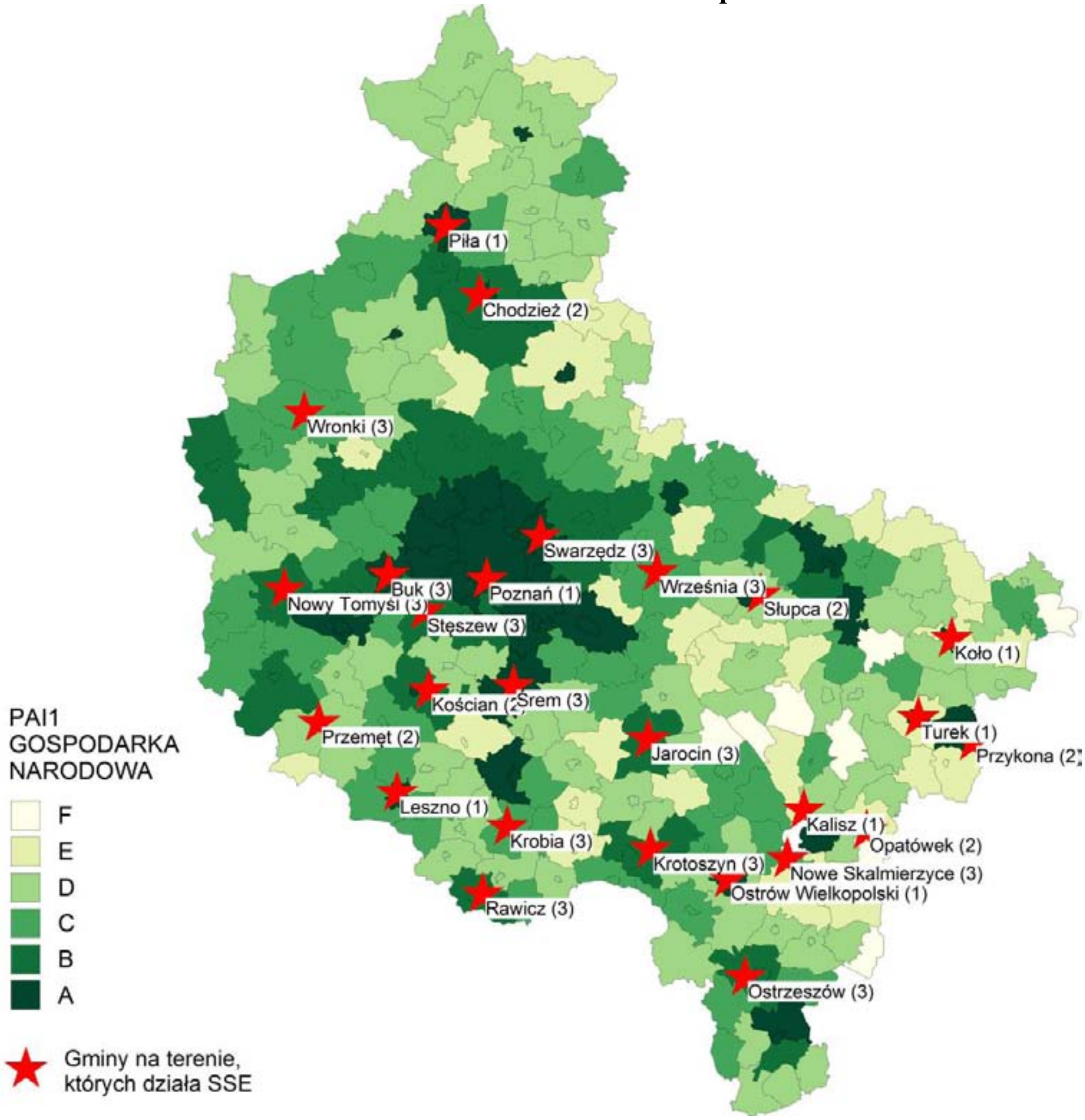
The Greater Poland Agricultural Consulting Centre *(Wielkopolski Ośrodek Doradztwa Rolniczego)* **in Poznań** offers agricultural consulting on agriculture and rural areas development, agricultural market and village farm. These activities aim at increasing farmers' incomes, and market competitiveness of farms. The centre contributes to improvement of professional skills of farmers and inhabitants of rural activities. The statutory activity of the centre includes such tasks as: information meetings, articles, professional trainings, study trips, presentations, implementations), consulting and advisory (Local Discussion Groups, Demonstration farms). Some of the services are paid, including education and proinnovation activities (trainings and courses), consulting (business plans), laboratory research, experimentation. There is a database on the centre's website, concerning domestic and EU aid, economics, technology, environment and rural development. There is also an Electronic Platform of Services available for the farmers and inhabitants of rural areas that enable them to ask questions online. (http://www.wodr.poznan.pl/index.php, 8 November 2013)

Innovation, Development and Technology Transfer Centre of Poznań University of Technology *(Centrum Innowacji, Rozwoju i Transferu Technologii Politechniki Poznańskiej)* offers advice and consulting on acquiring EU funding and external domestic funding (search for partners, application preparation, project management), intellectual property and patents (preparing documentation, intellectual property protection), research results implementation (analysis of technology demands of a given firm, technology transfer, intellectual property pricing). The Patent Information Centre enables access to Polish and foreign patent documentation and publications of Polish Patent Office and other patent literature. The Centre also organises trainings, trade missions, conferences, meetings etc. Its website contains a database of Poznań Institute of Technology resources, which includes a database on staff and on the range of currently conducted research. (www.ciritt.put.poznan.pl/, 8 November 2013)

Special economic zones in voivodship – effects

There are 5 special economic zones (SEZs) in Greater Poland voivodship: Kamienna Góra SEZ, Kostrzyn-Słubice SEZ, Łódź SEZ, Pomeranian SEZ and Wałbrzych SEZ. At the end of 2012 the areas of the SEZs were parts of 7 cities and 19 communes – see Chart 6.

Chart 6. The location of SEZs in Greater Poland voivodship



Note: Red stars indicate communes with SEZ subzones within their areas.
Source: Authors' own calculations.

The first SEZ areas were brought into life in 2005. The investment outlays made by SEZ companies operating in the communes of Greater Poland by the end of 2012 amounted to PLN 2.6 billon, which made 3% of all investment outlays made in the Polish SEZs. In the same time the SEZ companies in the region created 5.7 thousand new jobs which made 3% of all jobs created in the Polish SEZs (see Table 4).

Table 4. Effects of special economic zone functioning at the end of 2012

SEZ / Subzone	County, Commune	Leading industries (at least 20% share of revenue or employment	Cumulated capital expenditure in million PLN (end of 2012)	Jobs number (end of 2012)
Wałbrzych / Jarocin	Jarocin, Jarocin (3)	no investors yet		
Łódź / Opatówek	Kalisz, Opatówek (2)	no investors yet		
Wałbrzych / Krotoszyn	Krotoszyn, Krotoszyn (3)	fabricated metal products (except machinery and equipment)	415.16	442
Kamienna Góra / OSTRÓW WLKP.	Ostrów Wielkopolski, Ostrów Wielkopolski (1)	other non-metallic mineral products, fabricated metal products (except machinery and equipment), manufacture of other transportation equipment	13.81	84
Łódź / Nowe Skalmierzyce	Ostrów Wielkopolski, Nowe Skalmierzyce (3)	furniture	358.93	1,060
Łódź / Ostrzeszów	Ostrzeszów, Ostrzeszów (3)	paper and paper products, machinery and equipment n.e.c.,	13.69	79
Wałbrzych / Kalisz	Kalisz (city), Kalisz (1)	computers, electronic and optical products	10.25	89
Łódź / Koło	Koło, Koło (1)	other non-metalic mineral products	101.40	306
Łódź / Słupca	Słupca, Słupca (2)	no investors yet		
Łódź / Turek	Turek, Turek (1)	chemicals and chemical products	2.18	
Łódź / Przykona	Turek, Przykona (2)	storage and transport supporting services	0.08	
Wałbrzych / Września	Września, Września (3)	rubber and plastic products	233.17	192
Kostrzyn-Słubice / Krobia	Gostyń, Krobia (3)	no investors yet		
Wałbrzych / Kościan	Kościan, Kościan (2)	other non-metalic mineral products	266.38	151
Kostrzyn-Słubice / Nowy Tomyśl	Nowy Tomyśl, Nowy Tomyśl (3)	electrical and non-electrical household appliances	116.93	675
Wałbrzych / Rawicz	Rawicz, Rawicz (3)	no investors yet		
Kostrzyn-Słubice / Przemęt	Wolsztyn, Przemęt (2)	no investors yet		

Wałbrzych / Leszno	Leszno (city), Leszno (1)	no investors yet		
Kostrzyn-Słubice / Chodzież	Chodzież, Chodzież (2)	furniture	92.50	104
Pomeranian / Piła	Piła, Piła (1)	no investors yet		
Kostrzyn-Słubice / Buk	Poznań, Buk (3)	chemicals and chemical products	111.10	116
Kostrzyn-Słubice / Stęszew	Poznań, Stęszew (3)	chemicals and chemical products	69.83	72
Kostrzyn-Słubice / Swarzędz	Poznań, Swarzędz (3)	foods	203.16	283
Kostrzyn-Słubice / Wronki	Szamotuły, Wronki (3)	electrical and non-electrical household appliances	43.89	263
Wałbrzych / Śrem	Śrem, Śrem (3)	chemicals and chemical products	209.88	307
Kostrzyn-Słubice / Poznań	Poznań (city), Poznań (1)	motor vehicles (excluding motorcycles), trailers and semi-trailers	333.83	1,527

Source: Authors' own calculations based on the Ministry of Economy data.

The largest investments in voivodship have been completed in Nowe Skalmierzyce and Krotoszyn. In Nowe Skalmierzyce the following companies have invested: CORRECT, K.Błaszczyk i wspólnicy, S-ka Komandytowa (Poland, furniture, synthetic mattresses), L.Correct Sp. z o.o. (Poland, furniture), and in Krotoszyn: „MAHLE Polska" Sp. z o.o. (Germany, diesel engine parts), DINO KROTOSZYN Sp. z o.o. (Poland, logistics, bakery).

According to the SEZ development plans the voivodeship wishes to attract investors:

- from machinery hi-tech industries, cooperating with research institutions, from food-processing and construction industries and investors interested in technology transfer – in Kamienna Góra SEZ,
- representing hi-tech industries and cooperating with research institutions, operating in data processing and logistics branches – in Kostrzyn-Słubice SEZ, Łódź SEZ, Pomeranian SEZ and Wałbrzych SEZ,
- from synthetic materials, metal and food processing industries – in Słupsk SEZ.

'A' Commune

Student Scientific Organisation for Entrepreneurship and Regional Analyses affiliated to the Institute of Enterprise of the Warsaw School of Economics, has again published the results of its research into the quality of investor assistance offered by the communal authorities.

The subject of this qualitative research of investment attractiveness is evaluation of the websites and evaluation of e-mail contact with communal authorities in two languages: Polish and English. The effect of this research is a ranking 'A' Commune, which is thought to distinguish best performing self-government territorial units in terms of the use of means of electronic communication to provide assistance to the customers. The research is carried out with the use of mystery client method. In this year's edition all communes belonging to Class A and B according to the PAI 2011 index were subject to the evaluation.

As a result 90 communes were distinguished, of which 8 are situated in Greater Poland voivodship (see Table 5).

Table 5. Communes in Greater Poland voivodship distinguished as 'A' Communes

Place in the ranking (for the whole country)	Commune	Evaluation of websites (score)	Evaluation of e-mail contact in Polish (score)	Evaluation of e-mail contact in English (score)	Sum
21	Rawicz (3)	6.0	11.0	9.0	26.0
22	Szamotuły (3)	10.0	5.0	11.0	26.0
29	Piła (1)	11.0	5.0	9.0	25.0
46	Krotoszyn (3)	12.0	11.0	0.0	23.0
56	Mosina (3)	12.5	9.0	0.0	21.5
69	Pobiedziska (3)	7.5	13.0	0.0	20.5
80	Czerwonak (2)	11.0	9.0	0.0	20.0
81	Rokietnica (2)	11.0	9.0	0.0	20.0

Source: Authors' own materials based on the research.

What distinguishes the websites of Piła, Krotoszyn, Czerwonak, Rokietnica is a wide range of information on conditions of running a business and investing and foreign language versions (mainly English and French). In the e-mail contact Pobiedziska, Rawicz, Mosina, Krotoszyn and Piła gave the best-prepared detailed answers and invited the investor to personal contact. What is more, Piła, Rawicz and Szamotuły prepared very good answers in English.

5. Region's strengths and weaknesses

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

Table 6. Strengths and weaknesses of Greater Poland voivodship

Strengths of the region according to the microclimates by the Institute of Enterprise of the Warsaw School of Economics	Weaknesses of the region according to the microclimates by the Institute of Enterprise of the Warsaw School of Economics
National economy	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class C Microclimate Sociall Infrastructure Class B Mikroklimat rynkowy Class C Microclimate InnovativenessClass B Productivity of enterprises Class C Returns on tangible assets Class B Profitability of enterprises Class C Self-financing of self-government units Class C	Social Microclimate Class D Microclimate Administration/Government Class D Investment outlays Class D
Capital-intensive industry	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class B Microclimate Sociall Infrastructure Class A Mikroklimat rynkowy Class C Microclimate InnovativenessClass B Returns on tangible assets Class A Self-financing of self-government units Class C Investment outlays Class C	Social Microclimate Class D Microclimate Administration/Government Class E Productivity of enterprises Class D
Labour-intensive industry	
Microclimate Human Resources Class A Microclimate Technical Infrastructure Class B Microclimate Sociall Infrastructure Class B Mikroklimat rynkowy Class C Returns on tangible assets Class A Self-financing of self-government units Class C Investment outlays Class C	Social Microclimate Class D Microclimate Administration/Government Class E Productivity of enterprises Class D
Trade	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class C Mikroklimat rynkowy Class C Returns on tangible assets Class A Productivity of enterprises Class A Self-financing of self-government units Class C Investment outlays Class A	Microclimate Sociall Infrastructure Class D Social Microclimate Class E Microclimate Administration/Government Class E
Tourism	
Microclimate Human Resources Class A Microclimate Technical Infrastructure Class B Microclimate Sociall Infrastructure Class B Self-financing of self-government units Class C	Social Microclimate Class E Mikroklimat rynkowy Class D Microclimate Administration/Government Class E Returns on tangible assets Class D Productivity of enterprises Class D Investment outlays Class D
Professional, science and technical activities	
Microclimate Human Resources Class B Microclimate Technical Infrastructure Class B Microclimate Sociall Infrastructure Class A Mikroklimat rynkowy Class C Microclimate InnovativenessClass B	Social Microclimate Class D Microclimate Administration/Government Class D Returns on tangible assets Class F Productivity of enterprises Class E

Self-financing of self-government units Class C	Investment outlays Class E

Source: Authors on the basis of the results of research of the Institute of Enterprise of the Warsaw School of Economics.

Summary

The engines of economic development of Greater Poland voivodship are the city counties: Poznań, Leszno, Konin, Kalisz and land counties: Poznań, Turek, Piła, Środa Wielkopolska, Chodzież, Śrem, Nowy Tomyśl i Grodzisk Wielkopolski as well as the special economic zones in the region.

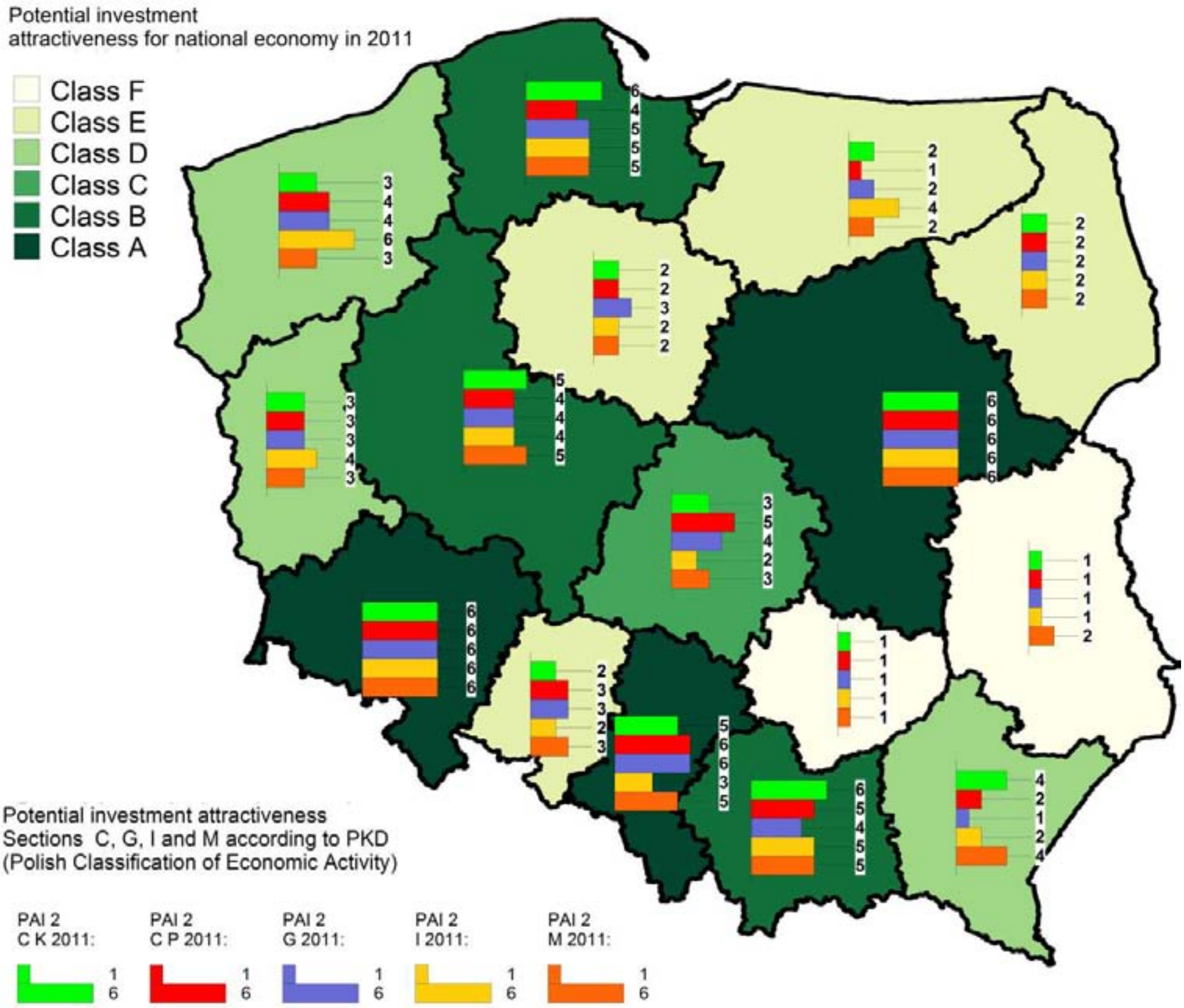
Greater Poland voivodship has predispositions to **create interregional clusters**, especially in sectors such as: manufacture of food products, manufacture of textiles, manufacture of leather and leather products, manufacture of wood and cork products, except furniture; articles of straw and plaiting materials, manufacture of paper and paper products, manufacture of wood, wood and cork products, except furniture; articles of straw and plaiting materials, manufacture of electric motors, generators, transformers and electricity distribution and control apparatus, manufacture of general-purpose machinery, manufacture of metal forming machinery and machine tools.

It can also develop **intelligent specializations** in the medium-high-tech sectors, basing on the competitive big and medium-sized companies in the **sectors of low technology**: manufacture of food products, manufacture of textiles, manufacture of leather and leather products, manufacture of wood, wood and cork products, except furniture; articles of straw and plaiting materials, manufacture of paper and paper products.

The voivodship is also characterised by competitiveness of small and medium enterprises from the **knowledge-based services sectors**, such as architecture and engineering, technical research and analyses and security and investigation activities as well as other knowledge-based services such as education.

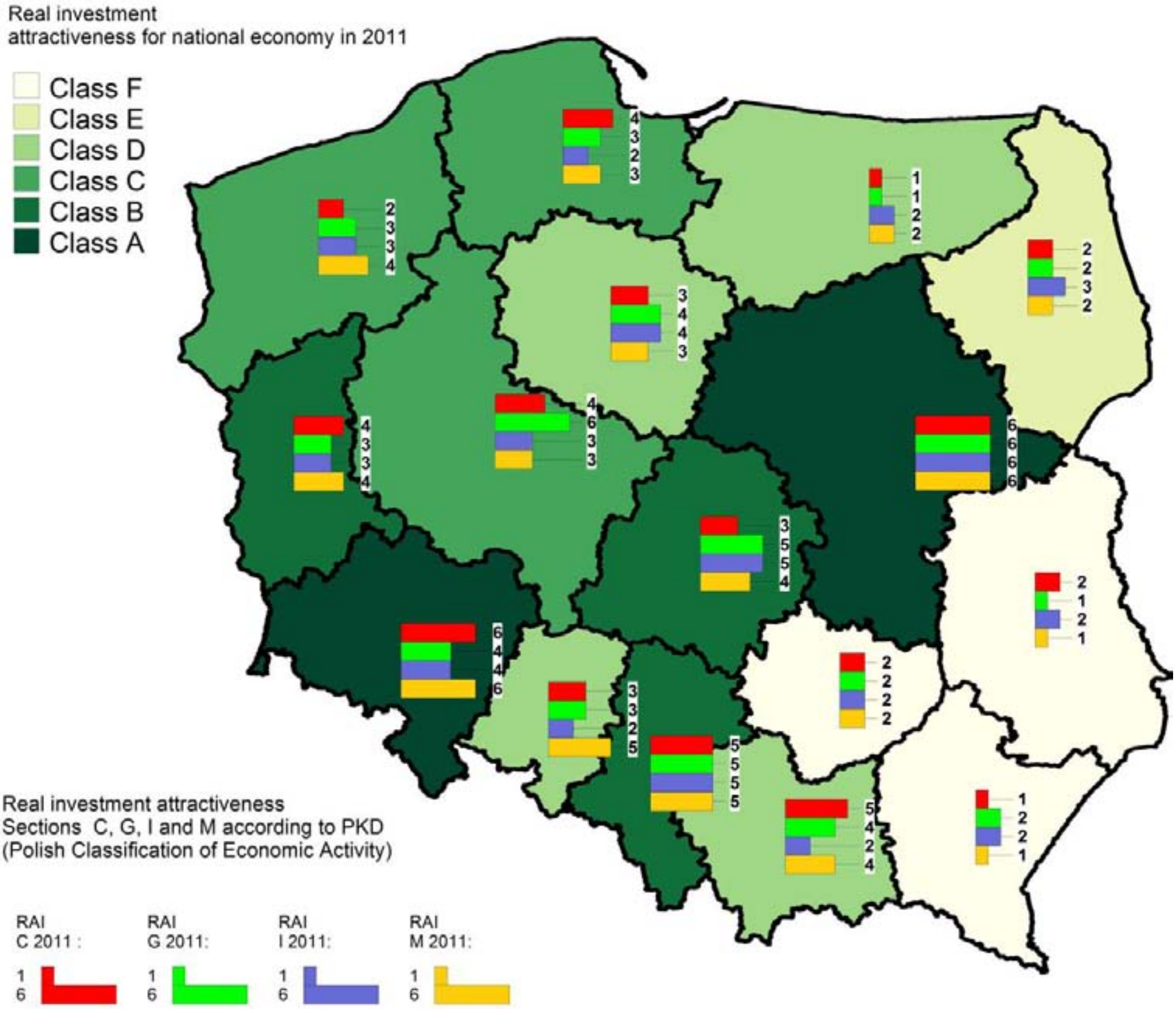
APPENDIX

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 Innovativeness	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.).

Table 3. Potential investment attractiveness of counties of Greater Poland voivodship for the national economy and selected sections

County	PAI1_GN	PAI1_GN_classes	PAI1_C_classes	PAI1_G_classes	PAI1_I_classes	PAI1_M_classes
Poznań (city)	0.360	A	A	A	A	A
Leszno	0.353	A	A	A	B	A
Konin	0.323	A	A	A	A	A
Poznań	0.302	A	A	A	A	A
Kalisz	0.292	A	B	A	C	A
Turek	0.261	C	C	C	D	C
Piła	0.256	C	C	C	C	C
Środa Wielkopolska	0.255	C	C	C	C	C
Chodzież	0.249	C	C	C	D	C
Śrem	0.244	C	C	C	D	C
Nowy Tomyśl	0.243	C	C	C	C	D
Grodzisk Wielkopolski	0.243	C	C	C	D	D

Source: As for Table 1.

Table 4. Potential investment attractiveness of communes of Greater Poland voivodship for the national economy and selected sections

Commune	PAI1_GN	PAI1_GN_classes	PAI1_C_classes	PAI1_G_classes	PAI1_I_classes	PAI1_M_classes
Tarnowo Podgórne (2)	0.276	A	A	A	A	A
Turek (1)	0.275	A	A	A	C	A
Leszno (1)	0.274	A	A	A	B	A
Poznań (1)	0.272	A	A	A	A	A
Czarnków (1)	0.270	A	A	A	A	A
Chodzież (1)	0.269	A	A	A	B	A
Luboń (1)	0.266	A	A	A	B	A
Suchy Las (2)	0.266	A	A	A	A	A
Kościan (1)	0.265	A	A	A	D	A
Konin (1)	0.260	A	A	A	A	A
Piła (1)	0.260	A	A	A	A	A
Komorniki (2)	0.257	A	A	A	A	A
Ostrów Wielkopolski (1)	0.252	A	A	A	C	A
Wągrowiec (1)	0.252	A	A	A	B	A
Gniezno (1)	0.245	A	A	A	C	A
Dopiewo (2)	0.245	A	A	A	B	A
Kalisz (1)	0.243	A	A	A	C	A

Słupca (1)	0.240	A	A	A	C	A
Puszczykowo (1)	0.238	A	A	A	A	A
Swarzędz (3)	0.236	A	A	A	B	A
Koło (1)	0.230	A	A	A	C	A
Kleszczewo (2)	0.230	A	A	A	B	A
Przykona (2)	0.229	A	A	A	A	C
Kępno (3)	0.229	A	A	A	B	A
Złotów (1)	0.229	A	A	A	C	A
Czerwonak (2)	0.228	A	A	A	A	A
Rokietnica (2)	0.227	A	A	A	B	A
Buk (3)	0.226	A	A	B	C	A
Śrem (3)	0.226	A	A	A	B	A
Kleczew (3)	0.225	A	A	A	B	B
Kórnik (3)	0.224	A	A	A	A	A
Środa Wielkopolska (3)	0.224	A	A	A	C	A
Gostyń (3)	0.222	A	A	A	B	A
Grodzisk Wielkopolski (3)	0.219	A	A	B	B	B
Nowy Tomyśl (3)	0.216	B	B	B	B	A
Ujście (3)	0.211	B	B	C	E	A
Międzychód (3)	0.210	B	B	B	C	B
Pobiedziska (3)	0.210	B	B	B	B	A
Mosina (3)	0.210	B	B	B	B	B
Ostrzeszów (3)	0.209	B	B	B	B	B
Jarocin (3)	0.208	B	B	B	C	A
Rawicz (3)	0.208	B	B	B	D	A
Oborniki (3)	0.208	B	B	B	B	B
Wolsztyn (3)	0.207	B	B	B	C	B
Murowana Goślina (3)	0.204	B	B	B	B	B
Pniewy (3)	0.204	B	B	B	B	B
Chodzież (2)	0.203	B	B	B	B	C
Kościan (2)	0.203	B	B	B	D	B
Baranów (2)	0.203	B	B	B	C	C
Stęszew (3)	0.203	B	B	C	C	B
Margonin (3)	0.202	B	B	B	C	B
Powidz (2)	0.202	B	B	B	B	C
Krotoszyn (3)	0.201	B	B	B	C	B
Kostrzyn (3)	0.200	B	B	C	D	B
Szamotuły (3)	0.200	B	B	B	C	B
Łubowo (2)	0.200	B	C	B	C	B
Opalenica (3)	0.200	B	B	C	C	B
Budzyń (2)	0.199	B	B	C	B	B
Kazimierz Biskupi (2)	0.198	B	B	C	D	B
Wieleń (3)	0.197	C	B	C	A	D
Września (3)	0.196	C	C	C	D	B
Kaczory (2)	0.195	C	C	C	D	B
Zduny (3)	0.194	C	C	C	B	B
Władysławów (2)	0.194	C	C	B	C	D

Pakosław (2)	0.194	C	C	C	D	C
Nekla * (3)	0.194	C	C	C	C	C
Obrzycko (1)	0.193	C	C	C	D	C
Stare Miasto (2)	0.193	C	C	C	C	C
Ślesin (3)	0.192	C	C	C	B	C
Granowo (2)	0.191	C	C	C	E	B
Zaniemyśl (2)	0.191	C	C	C	D	B
Lipno (2)	0.191	C	C	C	C	C
Doruchów (2)	0.190	C	C	B	D	C
Siedlec (2)	0.190	C	C	C	D	C
Zbąszyń (3)	0.190	C	C	C	B	C
Rogoźno (3)	0.190	C	C	C	E	C
Miłosław (3)	0.189	C	C	D	B	C
Śmigiel (3)	0.189	C	C	C	D	C
Raszków (3)	0.189	C	C	C	D	C
Trzcianka (3)	0.188	C	C	C	B	B
Krobia (3)	0.186	C	C	C	E	C
Witkowo (3)	0.185	C	C	C	D	C
Rydzyna (3)	0.185	C	C	C	C	C
Sulmierzyce (1)	0.184	C	C	C	D	C
Piaski (2)	0.183	C	C	D	E	C
Odolanów (3)	0.183	C	C	C	E	C
Święciechowa (2)	0.183	C	C	D	C	C
Duszniki (2)	0.182	C	C	D	D	C
Sieraków (3)	0.182	C	C	C	B	C
Pleszew (3)	0.182	C	C	D	D	C
Kaźmierz (2)	0.182	C	C	C	D	C
Nowe Skalmierzyce (3)	0.182	C	C	D	D	C
Kłodawa (3)	0.182	C	C	C	E	D
Krzykosy (2)	0.182	C	C	C	D	D
Kuślin (2)	0.181	C	C	C	C	D
Wronki (3)	0.181	C	C	C	B	C
Czerniejewo (3)	0.181	C	C	C	C	C
Skoki (3)	0.181	C	C	C	C	C
Perzów (2)	0.181	C	C	D	D	C
Rakoniewice (3)	0.181	C	C	D	D	C
Gniezno (2)	0.181	C	C	D	D	C
Łobżenica (3)	0.181	C	C	C	D	D
Kiszkowo (2)	0.180	C	C	C	E	D
Gołuchów (2)	0.180	C	C	D	D	C
Kobyla Góra (2)	0.180	C	C	D	C	C
Pępowo (2)	0.180	C	D	D	D	C
Stawiszyn (3)	0.180	C	C	D	D	D
Trzemeszno (3)	0.179	C	C	D	D	D
Ostrowite (2)	0.179	C	C	C	D	D
Nowe Miasto nad Wartą (2)	0.179	C	D	D	E	C

Source: As in Table 1.
Note: All the indices in the report have been calculated on the basis on the most up-to-date data from the Regional Data Bank (RDB), 2013.