Warsaw School of Economics

REGIONAL INVESTMENT ATTRACTIVENESS 2014

Lower Silesian Voivodship

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- facilitating contacts with central and local authorities,
- identification of suppliers and contractors,
- care of existing investors (support of reinvestments in Poland).

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INTRODUCTION

The report has been prepared to order of the Polish Information and Foreign Investment Agency and is the next edition of the regional investment attractiveness reports. The reports have been published since 2008. They are the result of scientific research conducted since 2002 under the supervision of H. Godlewska-Majkowska, Ph.D., university professor of the Warsaw School of Economics, in the Institute of Enterprise, Collegium of Business Administration of the Warsaw School of Economics. All the authors are the core members of a team that develops methodology of calculating regional investment attractiveness.

The report consists of a few parts. The first part includes the synthetic presentation of the voivodship's economy, including social-economic potential of the voivodship and the level of economic development as well as economy structure. The most important socio-economic data, including information on investment attractiveness, is presented in a table. The first part of the report also presents the position of the voivodship compared to other Polish and European Union regions, paying special attention to the most important industries and high potential sectors.

The second part of the report presents internal diversification of voivodship's investment attractiveness at the levels of counties (Polish: *county*) and communes (Polish: *gmina*). The results of the investment attractiveness calculations for the Lower Silesian voivodship's territorial units can be compared to the other territorial units from all of the Polish regions as the calculations have been made for all of them.

In the third part of the report the main business environment institutions in the voivodship are presented, taking into consideration kinds of support which they offer to investors. This part also includes information on location of the Special Economic Zones (SEZs) in the voivodship and information on the results of their activities. The third part of the report is completed by the presentation of the results of the 'A' Commune ranking. The ranking made it possible to point out such communes that are not only attractive for potential investors but also offer them well-prepared information on the Internet.

The report is completed with the Appendix including tables with comparisons of investment attractiveness indices for voivodship's counties and communes. There is also some more detailed information in the Appendix concerning effects of functioning of the Special Economic Zones in the region.

There are two approaches to the investment attractiveness presented in this work. One of them is **potential investment attractiveness**, defined as a set of regional location advantages that influence achieving investors' goals (such as costs of running a business, sales revenues, net return on investment and investment's competitiveness).

Another approach is **real investment attractiveness**, defined as region's ability to create investor's satisfaction and influence absorption of financial and physical capital in form of investments. They can be measured by effectiveness of capital spending.[1]

Potential investment attractiveness indices in their simplified version (PAI1) measure the location-specific advantages of regions. 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 indices refer to the whole national economy and to the selected sections: C – manufacturing industry, G – trade and repair, I – tourism and catering, M – professional, scientific and technical services. These sections are the core of the national economy.

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.

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. Real investment attractiveness can be calculated for voivodships, based on the statistical data available on the regional level.

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 Institute of Enterprise at the Warsaw School of Economics (**http://kolegia.sgh.waw.pl/pl/KNoP/struktura/IP/struktura/ZOB/**), as well as in numerous scientific publications and expert opinions.

1. More information on this topic can be found in: *Atrakcyjność inwestycyjna regionów Polski jako źródło przedsiębiorczych przewag konkurencyjnych*, H. Godlewska-Majkowska (ed.), Studia i Analizy Instytutu Przedsiębiorstwa, Oficyna Wydawnicza SGH, Warszawa 2012; H. Godlewska-Majkowska, *Polish regions and their investment attractiveness in the EU*, in: POLAND Competitiveness Report 2013. National and Regional Dimensions, M. Weresa (ed.), Oficyna Wydawnicza SGH, Warsaw 2013, pp 299-316.

1. THE PROFILE OF REGIONAL ECONOMY OF LOWER SILESIAN (DOLNOŚLĄSKIE) VOIVODSHIP

Lower Silesian (dolnośląskie) voivodship is one of the three most attractive regions of Poland from investors' point of view.

Its advantages are:

- very high level of economic development, significantly exceeding the national average,
- 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,
- 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.

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 2012 (PLN/person)	47140.9	41439.1	-
Population (persons) on 31 December 2013	2909997	38495659	7.60%
Human Resources Potential			
Higher education institutions graduates (persons) in 2013	39855	454986	8.80%
Secondary schools graduates (persons) in 2013	17550	271333	6.50%
Number of employed persons in 2013	1056	15568	6.80%
Structure of employed persons in 2013	agriculture 5.6% industry 34.8% services 59.6%		12.0% 30.5% 57.5%
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2012	5339.6	79942.6	6.70%
Capital of companies (PLN n) in 2012	17507.2	206992	8.50%
Special Economic Zones (SEZs) in the voivodship*			
– **Kamienna Góra SEZ** – **Legnica SEZ** – **Tarnobrzeg SEZ** – **Wałbrzych SEZ**			
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 and repair class A Tourism and catering class B		
Real investment attractiveness RAI	National economy class A Industry class A Trade and repair class C Tourism and gastronomy class B Professional, scientific and technical services class B		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	Polkowice, city of Wrocław, Lubin, city of Legnica, Wrocław, city of Jelenia Góra	
	Class B	Głogów, Zgorzelec, Wołów, Świdnica	

Communes	Class A	Wrocław (u), Lubin (u), Chojnów (u), Bolesławiec (u), Zgorzelec (u), Świdnica (u), Głogów (u), Karpacz (u), Złotoryja (u), Oleśnica (u), Jawor (u), Lubań (u), Legnica (u), Oława (u), Jelenia Góra (u), Polanica-Zdrój (u), Kłodzko (u), Kamienna Góra (u), Dzierżoniów (u), Świebodzice (u), Duszniki-Zdrój (u), Szczawno-Zdrój (u), Wałbrzych (u), Kudowa-Zdrój (u), Kowary (u), Bielawa (u), Świeradów-Zdrój (u), Piława Górna (u), Boguszów-Gorce (u), Jedlina-Zdrój (u), Zawidów (u), Piechowice (u), Szklarska Poręba (u), Jerzmanowa (r), Kobierzyce (r), Rudna (r), Lubin (r), Grębocice (r), Długołęka (r), Czernica (r), Warta Bolesławiecka (r), Polkowice (u-r), Brzeg Dolny (u-r), Siechnice (u-r), Bogatynia (u-r), Strzegom (u-r), Kąty Wrocławskie (u-r), Prochowice (u-r), Radków (u-r), Oborniki Śląskie (u-r), Żarów (u-r)
	Class B	Nowa Ruda (u), Kunice (r), Bolesławiec (r), Podgórzyn (r), Krośnice (r), Czarny Bór (r), Radwanice (r), Malczyce (r), Zgorzelec (r), Wisznia Mała (r), Strzelin (u-r), Jelcz-Laskowice (u-r), Syców (u-r), Wołów (u-r), Środa Śląska (u-r), Lądek-Zdrój (u-r), Pieńsk (u-r), Góra (u-r), Lubawka (u-r), Sobótka (u-r), Stronie Śląskie (u-r), Chocianów (u-r), Ząbkowice Śląskie (u-r), Szczytna (u-r), Mieroszów (u-r), Trzebnica (u-r), Gryfów Śląski (u-r)

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 3 in the Appendix.
Source: Authors' own calculations.

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 2013 was as follows: 16.9% of the population at pre-productive age, 64.1% at productive age and 19.0% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 35 higher education institutions in which there are 141,707 students studying, which makes up 9.1% 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 registered unemployment rate in the voivodship amounted to 11.2% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 4011.5, which is 106.4% of the average for Poland.

In 2012 Lower Silesian voivodship made a contribution of 8.6 % to the GDP of Poland. Calculated per capita, it amounted to PLN 47140.9 with the average for Poland PLN 41439.1. With this result the voivodship takes the second place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 209.3% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterised by share of the service sector at the level of 59.5% whereas a share of the agricultural and industrial sectors are respectively 5.5% and 34.8% (Central Statistical Office, Local Data Bank 2014).

In the structure of voivodship's industry important role is played by: manufacture of motor vehicles, trailers and semi-trailers (19% of sold production of the whole voivodship's industry at the end of 2013), manufacture of computers, electronic and optical products (9%), as well as manufacture of rubber and plastic products (7%), manufacture of food products and metal products (6% each).

High development potential of the voivodship and high level of industrialization made Lower Silesian voivodship the main manufacturer of motor vehicles and vehicle parts in the country (19% of the country's sold production in 2013).

The voivodship's position is especially strong among the voivodships specialized in manufacture of computers, electronic and optical products (32% of the country's sold production). It also distinguishes itself as a region that manufactures leather and leather products (25%), textiles (20%), rubber and plastic products (11%), electric appliances (11%), machinery and appliances (11%) and metal products (9%).

When it comes to most of the above-mentioned sectors, the voivodship improved its competitive position within the last three years (measured by its share in the country's sold production) [2]. It applies to the following sectors:

- manufacture of motor vehicles, trailers and semi-trailers, excluding motorcycles,
- manufacture of computers, electronic and optical products,
- manufacture of rubber and plastic products,
- manufacture of textile products,
- manufacture of paper and paper products,
- manufacture of chemicals and chemical products,
- manufacture of fabricated metal products (except machinery and equipment).

The information on sectors that are found as strategic by the region's authorities can be important for the investors. 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.

For the entrepreneurs willing to invest in Lower Silesian voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and

[2] Calculations based on the Statistic Bulletin of the Lower Silesian Voivodship from the 1st quarter of 2014 and Statistical Bulletin, I quarter of 2014, www.stat.gov.pl (10 November 2014).

Foreign Investment Agency in cooperation with the Lower Silesian voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include automotive, electric machines, high-tech and BPO sectors.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Kamienna Góra SEZ, Legnica SEZ, Tarnobrzeg SEZ and Wałbrzych SEZ in the following subzones:**

- **Kamienna Góra SEZ**, subzones: Dobroszyce (r), Gryfów Śląski (u-r), Janowice Wielkie (r), Jawor (u), Jelenia Góra (u), Kamienna Góra (u), Kamienna Góra (r), Lubań (u), Lubawka (u-r), Nowogrodziec (u-r), Piechowice (u), Prusice (u-r), Zgorzelec (u), Żmigród (u-r),

- **Legnica SEZ**, subzones: Chojnów (u), Chojnów (r), Głogów (u), Gromadka (r), Legnica (u), Legnickie Pole (r), Lubin (u), Miękinia (r), Polkowice (u-r), Prochowice (u-r), Przemków (u-r), Środa Śląska (u-r), Złotoryja (u),

- **Tarnobrzeg SEZ,** subzone: Kobierzyce (r),

- **Wałbrzych SEZ**, subzones: Bielawa (u), Bolesławiec (u), Brzeg Dolny (u-r), Bystrzyca Kłodzka (u-r), Długołęka (r), Dzierżoniów (u), Góra (u-r), Jelcz-Laskowice (u-r), Kłodzko (u), Kłodzko (r), Kudowa-Zdrój (u), Nowa Ruda (u), Nowa Ruda (r), Oleśnica (u), Oława (u), Oława (r), Piława Górna (u), Strzegom (u-r), Strzelin (u-r), Syców (u-r), Świdnica (u), Świdnica (r), Świebodzice (u), Twardogóra (u-r), Wałbrzych (u), Wiązów (u-r), Wołów (u-r), Wrocław (u), Ząbkowice Śląskie (u-r), Żarów (u-r).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 25% - 45%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

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

Lower Silesian voivodship is characterised by a very high level of overall investment attractiveness, which is indicated by the high rank (class A) according to the main potential investment attractiveness indices calculated for the national economy, industry, trade and repair. It also takes a very high position, when it comes to foreign investment inflows.

In 2012 Lower Silesian region took the third place in Poland in terms of accumulated share capital in the companies with foreign capital participation (an 8.5% share of its total value in all voivodships).

Lower Silesia is also characterised by a high increase in its competitiveness in terms of foreign direct investments, which is reflected in the fact that in the years 2003-2011 its market share measured with the value of foreign capital in the above mentioned companies rose from 5.8% to 9%.

Based on the methodology prepared by the team of the Enterprise Institute while conducting statutory research in Collegium of Business Administration at the Warsaw School of Economics, calculations of European regions' investment attractiveness have been made for two years. They are based on measurements of attractiveness of human resources, market and innovativeness.[3] However, due to different methodology of research and variables taken into account for regions in Poland only and regions in the EU, the results of research are incomparable. This is because not all data are available for all the regions, e.g. data on infrastructure.

Based on the above-mentioned indices it can be stated that the voivodship is characterized by a relatively low class of investment attractiveness (class D), compared to the EU regions, taking 164th place of 270 regions, for whom the indices were calculated. However, compared to the previous year, the voivodship increased its position by 20 places. Lower Silesia voivodship has a competitive advantage, when it comes to human capital microclimate, ranked class A, at the 17th place among all the EU regions. (Due to different methodology of research and variables taken into account for regions in Poland only and regions in the EU, the results of research are incomparable. This is because not all data are available for all the regions, e.g. data on infrastructure).

It is worth mentioning that the voivodship is more attractive than EU regions such as:

- **in Austria**: Burgenland;
- **in Belgium:** Prov. Luxembourg;
- **in Bulgaria:** Severoiztochen, Yugoiztochen, Severen tsentralen, Yuzhen tsentralen, Severozapaden;
- **in the United Kingdom:** Highlands and Islands, Cumbria, East Yorkshire and Northern Lincolnshire, West Wales and The Valleys, Cornwall and Isles of Scilly, Lincolnshire;

[3] More on this topic: *Atrakcyjność inwestycyjna regionów Polski na tle Unii Europejskiej*, edited by H. Godlewska-Majkowska, Oficyna Wydawnicza SGH, Warsaw 2014 and **http://kolegia.sgh.waw.pl/pl/KNoP/struktura/IP/struktura/ZOB/**

- **in the Czech Republic:** Severovýchod, Jihozápad, Moravskoslezsko, Strední Morava, Severozápad;
- **in France:** Franche-Comté, Lorraine, Auvergne, Basse-Normandie, Limousin, Bourgogne, Champagne-Ardenne, Poitou-Charentes, Picardie;
- **in Greece:** Kentriki Makedonia, Kriti, Notio Aigaio, Thessalia, Ipeiros, Dytiki Ellada, Sterea Ellada, Ionia Nisia, Dytiki Makedonia, Voreio Aigaio, Peloponnisos, Anatoliki Makedonia, Thraki;
- **in Spain:** Galicia, Comunidad Valenciana, Ciudad Autónoma de Ceuta, Andalucía, Illes Balears, Canarias, Castilla-La Mancha, Región de Murcia, Extremadura;
- **in the Netherlands:** Drenthe;
- **in Lithuania:** Lietuva;
- **in Latvia:** Latvija;
- **in Germany:** Schleswig-Holstein, Münster, Chemnitz (NUTS 2006), Niederbayern, Weser-Ems, Sachsen-Anhalt, Lüneburg;
- **in Portugal:** Região Autónoma da Madeira, Algarve, Norte, Alentejo, Região Autónoma dos Açores, Centro;
- **in Romania:** Vest, Nord-Vest, Centru, Sud-Est, Nord-Est, Sud-Vest Oltenia, Sud - Muntenia;
- **in Slovakia:** Západné Slovensko, Stredné Slovensko, Východné Slovensko;
- **in Slovenia:** Vzhodna Slovenija;
- **in Hungary:** Nyugat-Dunántúl, Közép-Dunántúl, Dél-Dunántúl, Észak-Magyarország, Dél-Alföld, Észak-Alföld;
- **in Italy:** Friuli-Venezia Giulia (NUTS 2006), Valle d'Aosta/Vallée d'Aoste, Marche (NUTS 2006), Campania, Abruzzo, Umbria (NUTS 2006), Molise, Sardegna, Sicilia, Puglia, Calabria, Basilicata.

3. INTERNAL DIVERSIFICATION OF REGIONAL INVESTMENT ATTRACTIVENESS

Investment attractiveness of the particular administrative units in the voivodship is the result of how investors assess conditions of conducting business that are important for them. These conditions include labour market, technical infrastructure, market and natural conditions.

Labour market assessment gives investor the information on opportunities to recruit the right employees for their companies and labour surpluses or shortages, which indirectly influences costs of hiring workers.

Technical infrastructure assessment allows entrepreneurs to plan their investments that need preparing of investment plot equipped with the basic technical elements such as water, gas and electric installations and environment protection equipment such as sewage farms.

Social infrastructure is rated as equipment of a place where the investment is to be located with facilities influencing citizens' life quality and human resources development. These facilities provide the citizens with access to education, healthcare, sports and recreation facilities or information technologies such as Internet.

Market conditions informs on market absorptive power that means the number of potential customers and indirectly on their wealth that means ability to buy goods and services.
Environment conditions were rated as they are a basic factor influencing tourism development and citizens' life quality.

The composite assessment of all the above-mentioned elements in particular counties or communes shows spatial differentiation of investment attractiveness in the voivodship. What is more, calculations for particular sectors of economy are presented such as industry, trade and modern services connected with professional, scientific and technical activities are presented (Chart 3 and Chart 4). The distinguished locations presented on the map are marked with stars that indicate highest marks for the above-mentioned areas of conducting business.

An **orange star** means that a county or a commune was rated above average in all the sections analysed (national economy, industry, trade, tourism and professional services) and the **golden star** is the highest distinction and means that all the rated sections in a particular commune or county were ranked at the highest level.

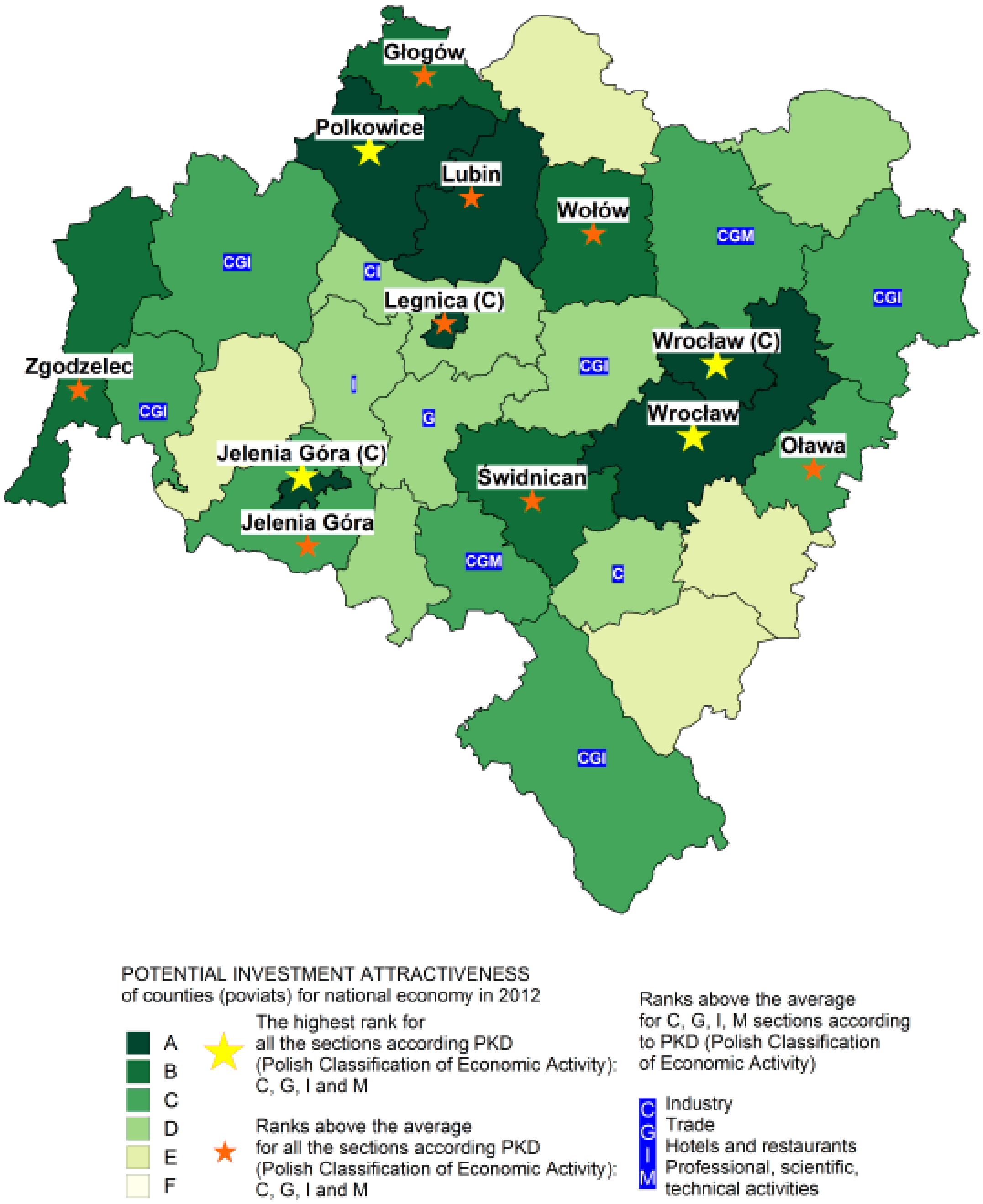
When it comes to counties, the highest ranked city counties were city of Wrocław and city of Jelenia Góra and when it comes to land counties, the highest ranked ones were Polkowice and Wrocław as well as (distinguished with orange stars:) land county Lubin and city county Legnica.

When it comes to urban communes, the highest ranked of them were:

- **distinguished with a golden star:** Wrocław (u), Bolesławiec (u), Zgorzelec (u), Karpacz (u), Złotoryja (u), Oleśnica (u), Lubań (u), Legnica (u), Jelenia Góra (u), Polanica-Zdrój (u), Dzierżoniów (u), Duszniki-Zdrój (u), Szczawno-Zdrój (u)

- **distinguished with an orange star**: Lubin (u), Chojnów (u), Świdnica (u), Głogów (u), Jawor (u), Oława (u), Kłodzko (u), Kamienna Góra (u), Świebodzice (u), Wałbrzych (u), Kudowa-Zdrój (u), Kowary (u), Bielawa (u), Świeradów-Zdrój (u), Boguszów-Gorce (u), Jedlina-Zdrój (u), Zawidów (u), Piechowice (u), Szklarska Poręba (u).

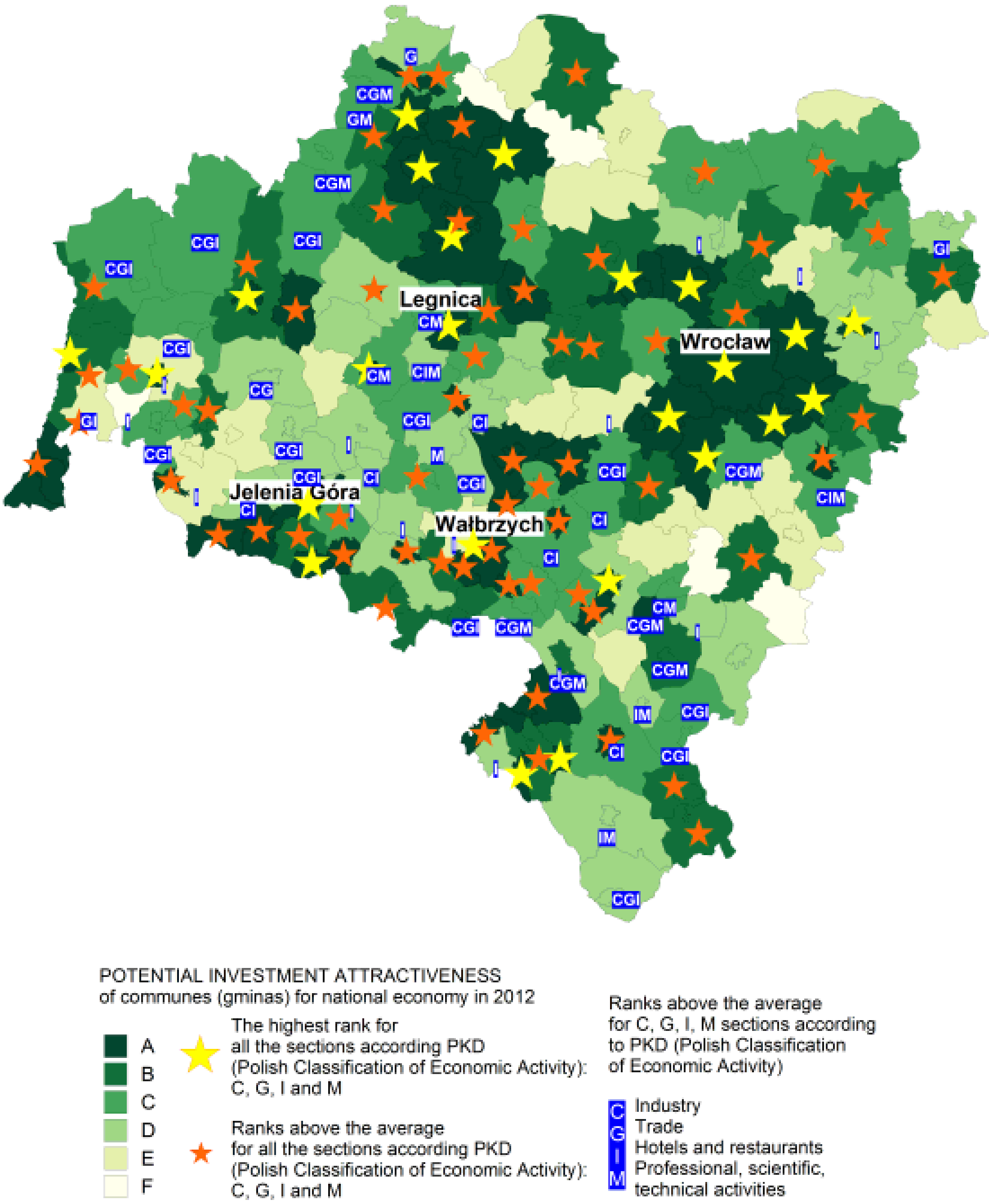
Chart 3. Potential investment attractiveness of counties of Lower Silesian voivodship, considering the most attractive sections



Golden star counties:
Polkowice, city of Wrocław, Wrocław, city of Jelenia Góra

Source: Authors' own work.

Chart 4. Potential investment attractiveness of communes of Lower Silesian voivodship, considering the most attractive sections



Golden star communes:
Wrocław (u), Bolesławiec (u), Zgorzelec (u), Karpacz (u), Złotoryja (u), Oleśnica (u), Lubań (u), Legnica (u), Jelenia Góra (u), Polanica-Zdrój (u), Dzierżoniów (u), Duszniki-Zdrój (u), Szczawno-Zdrój (u), Jerzmanowa (r), Kobierzyce (r), Rudna (r), Lubin (r), Długołęka (r), Czernica (r), Polkowice (u-r), Brzeg Dolny (u-r), Siechnice (u-r), Kąty Wrocławe (u-r), Oborniki Śląskie (u-r)

Source: Authors' own work

Among rural communes the highest rank communes include:
- **golden star communes:** Jerzmanowa (r), Kobierzyce (r), Rudna (r), Lubin (r), Długołęka (r), Czernica (r) and
- **orange star communes**: Grębocice (r), Warta Bolesławiecka (r).

Among urban-rural communes the highest rank communes include:
- **golden star communes:** Polkowice (u-r), Brzeg Dolny (u-r), Siechnice (u-r), Kąty Wrocławe (u-r), Oborniki Śląskie (u-r) and
- **orange star communes**: Bogatynia (u-r), Strzegom (u-r), Prochowice (u-r), Radków (u-r), Żarów (u-r).

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.

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4.1. BUSINESS ENVIRONMENT INSTITUTIONS

Among business environment institutions (excluding R&D institutions) that influence region's economic development are: chambers of commerce, associations, business incubators, technology parks, technology transfer centres, consulting centres, financial institutions and development agencies.

For the investors especially important is a system of regional Investor Services Centres set up by the Polish Information and Foreign Investment Agency in consultation with voivodships' marshals to ensure complex services for investors in each voivodship.

In Lower Silesian voivodship such centre is:

the Investor Assistance Centre operating within
Lower Silesian Agency for Economic Cooperation plc (*Dolnośląska Agencja Współpracy Gospodarczej S.A.*) in Wrocław
www.dawg.pl

Lower Silesian Investor Assistance Centre is a partner of the Polish Information and Foreign Investment Agency and a one stop shop: a source of regional information that are useful for investors, legal acts, investment offers and current data on region's economy. The personnel of the centre have qualifications to offer services for investors and are working according to the standards set by the Polish Information and Foreign Direct Investment Agency, which offers it substantive help and trainings.

An important tool supporting investors are the Special Economic Zones, which are described in the further part of this report.

Below some chosen business environment institutions are presented that operate for entrepreneurship development by supporting development of new technologies and cooperation of enterprises.

These institutions are among others:

Lower Silesian Chamber of Commerce (*Dolnośląska Izba Gospodarcza*) ***(www.dig.wroc.pl)***
This is an organization of economic self-government, whose members are business entities. It arranges partnerships of Polish and international partners and actively looks for their offers, organizes domestic and international trade missions, organizes and coordinates trainings, informs on EU and domestic funds.

Western Chamber of Commerce (*Zachodnia Izba Gospodarcza)* ***(www.zig.pl)***
The chamber is and organization of economic self-government, securing and representing interests of its members, propagating ethical rules in conducting business and supporting entrepreneurship development and cooperation with self-governments and other organizations. It organizes trainings for entrepreneurs, meetings with experts. It also helps to establish contacts in Poland and abroad.

Business Centre Club Lower Silesian Chamber (*www.bcc.org.pl)*
BCC is an organization of entrepreneurs and individual employers. It lobbies for development of free market economy, legal regulations and interests of Polish entrepreneurs. BCC

represents interests of employers in numerous bodies lobbying or deciding on relations between employers and employees such as Trójstronna Komisja ds. Społeczno-Gospodarczych, Wojewódzkie Komisje Dialogu Społecznego, Rady Zatrudnienia (in counties and voivodships), Rada Ochrony Pracy, Fundusz Gwarantowanych Świadczeń Socjalnych, Naczelna Rada Zatrudnienia. BCC is an initiator of Dialogue Forum (communication platform for different social groups) and promotes the idea of Corporate Social Responsibility.

KGHM LETIA Legnica Technology Park ***(KGHM LETIA Legnicki Park Technologiczny) (www.letia.pl)***
The mission of the park is creating competitive and innovative region's economy by fostering entrepreneurship development. The main goals of the park are seeking for investors, entrepreneurship development and jobs creation. The park disposes of attractive investment plots (about 30 ha of land) located near Legnica Copper Smelter, near A4 motorway and national road no. 3. Investment plots can be included to the SEZ.

Wrocław Technology Park ***(Wrocław Park Technologiczny) (www.technologpark.pl)***
The park is targeted at hi-tech enterprises, laboratories and R&D centres. The goals of the park are: seeking for investors, increasing investment attractiveness of the park and its environment, building right infrastructure for innovative entrepreneurs and supporting such entrepreneurs, commercialization of research results, research, development and implementation works in biotechnology and technical sciences, upgrading high-tech and pro-innovative management skills of business units personnel and cooperation with domestic and foreign proinnovative units.

Lower Silesian Innovation and Science Park ***(Dolnośląski Park Innowacji i Nauki) (www.dpin.pl)***
The main goals of the park are: seeking for and promotion of new products and services, commercialization of innovative research results, fostering effective communication between Lower Silesian enterprises and universities, adaptation of modern technology solutions and services in enterprises. Within the park companies can locate their businesses in the park itself (companies declaring cooperation with scientific units and companies working on or introducing new market solutions), in the Technology Incubator (small and medium enterprises working on new products, services or processes) and in the Business Incubator (new-born small and medium enterprises). There is a Cluster of Innovative Manufacturing Technologies working within the park (CINNOMATECH Cluster).

4.2. SPECIAL ECONOMIC ZONES IN THE VOIVODSHIP – EFFECTS

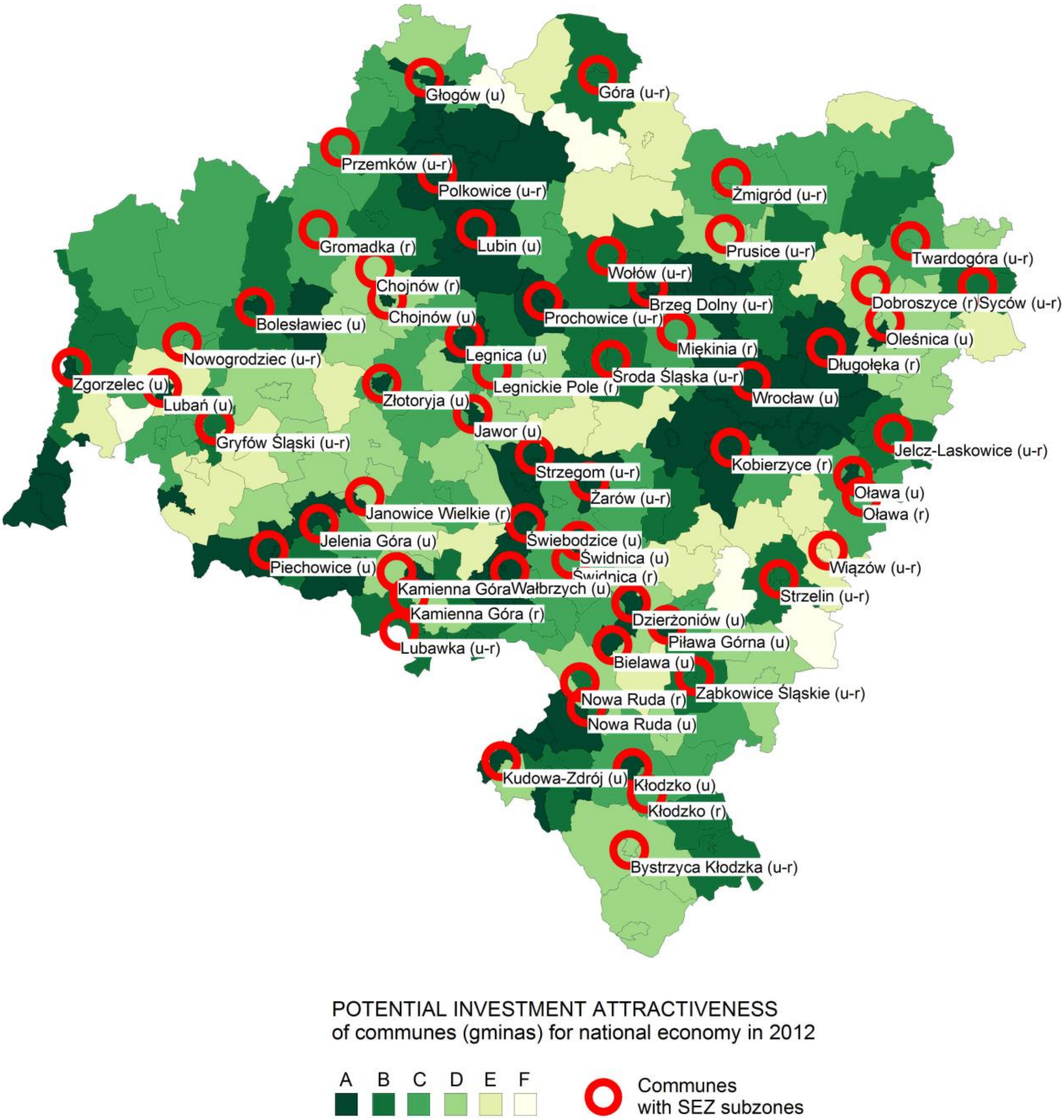
There are four special economic zones (SEZs) in Lower Silesian voivodship: Kamienna Góra SEZ, Legnica SEZ, Tarnobrzeg SEZ and Wałbrzych SEZ. At the end of 2013 the areas of the SEZs were parts of 24 cities and 34 communes (there are 2 zones in the area of Kobierzyce – Wałbrzych SEZ and Tarnobrzeg) – see Chart 5.

The first SEZ areas were brought into life in 1997. The investment outlays made by SEZ companies operating in the communes of Lower Silesia by the end of 2013 amounted to PLN 25.2 billion, which made 27% of all investment outlays made in the Polish SEZs. In the same time the SEZ companies in the region created 48.1 thousand new jobs which made 25% of all jobs created in the Polish SEZs (see Table 3 in the Appendix).

The largest investments in voivodship's SEZs have been completed in Wałbrzych, Kobierzyce, Wrocław, Polkowice, Legnica, Jelcz-Laskowice, Nowogrodziec, Oława, Świdnica and Żarów and are mostly related to automotive industry. TOYOTA has invested over 3,1 billion PLN in Wałbrzych and Jelcz.

Other communes have attracted firms producing parts and semi-products used in car construction like AGC SILESIA Sp. z o. o. (manufacture of glass products for the automotive industry), Autoliv Poland (manufacture of airbags), EPP Sp. z o.o. (manufacture of plastic products for household appliances industry and automotive industry), FAURECIA WAŁBRZYCH S.A. (manufacture of metal components for car seats), Mando Corporation Poland Sp. z o.o. (manufacture of vehicle parts and accessories), NSK Steering Systems Europe (Polska) sp. z o.o. (manufacture of steering gears), Sanden Manufacturing Poland Sp. z o.o. (automotive industry), Simoldes Plasticos Polska Sp. z o. o. (rubber and plastic products, motor vehicles parts and accessories, engines parts), Sitech Sp. z o.o. (automotive industry) and Volkswagen Motor Polska Sp. z o.o. (automotive industry).

Chart 5. The location of SEZs in Lower Silesian voivodship



Source: Authors' own work.

According to the plans of development for particular SEZs the voivodship intends to acquire the following kinds of investors:

- investors from machine, metal, textile and synthetic materials industries, who would create jobs related to the existing labour resources and facilities as well as investors from wood, furniture and chemical industries and companies interested in transferring innovation into industry – in the Kamienna Góra SEZ;
- investors from automotive, electronic, synthetic materials, and household appliances industries and the ones who would like to invest in innovation development and research projects in municipal areas in the Wałbrzych SEZ;

- investors from hi-tech industries, related to institutions gathering and processing of data as well as investors from logistics, automotive, machinery, textile, construction and food industries in the Legnica SEZ;
- investors that are cooperating with entrepreneurs from Technological Park LG in the field of advanced technologies and services in the Tarnobrzeg SEZ.

4.3. ‘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 (using *mystery client* method). 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 2012 index were subject to evaluation.

As a result 59 communes were distinguished, of which 7 are situated in Lower Silesian voivodship: Wrocław (u), Oława (u), Legnica (u), Nowa Ruda (u), Jelenia Góra (u), Ząbkowice Śląskie (r), Świdnica (u).

Almost all of the distinguished Lower Silesian communes run websites where information is presented in a clear and well-structured way which were marked above average. Information for investors is presented within a separate bookmark which allows easier communication with the commune office. When assessing answers to e-mails, it should be stated that more than a half of the offices answered both Polish and English e-mails. In most cases the answers included information that could be helpful for a potential investor. Particular attention should be given to Legnica, Świdnica and Bielawa as they were awarded the ‘A’ Commune title once again.

APPENDIX

Table 1 POTENTIAL INVESTMENT ATTRACTIVENESS OF POLISH VOIVODSHIPS FOR THE NATIONAL ECONOMY AND ITS SELECTED SECTIONS

Voivodship	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
	National economy	**National economy**	**Industry**	**Trade**	**Hotels and restaurants**	**Proffesional, scientific and technical activities**
Voivodships						
LOWER SILESIAN	0.39	A	A	A	B	A
KUYAVIAN-POMERANIAN	0.29	C	C	E	D	D
LUBLIN	0.17	F	F	F	F	F
LUBUSZ	0.23	E	E	D	C	D
ŁÓDŹ	0.29	C	C	D	E	D
LESSER POLAND	0.32	C	C	B	B	C
MAZOVIAN	0.40	A	A	A	A	A
OPOLE	0.22	E	E	D	E	D
SUB-CARPATHIAN	0.23	E	E	E	E	D
PODLASKIE	0.20	F	F	F	E	E
POMERANIAN	0.34	B	C	B	A	B
SILESIAN	0.41	A	A	B	C	A
ŚWIĘTOKRZYSKIE	0.16	F	F	F	F	F
WARMIAN-MAZURIAN	0.24	E	E	C	C	E
GREATER POLAND	0.31	C	C	C	D	B
WESTERN POMERANIAN	0.34	B	B	B	A	B

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 counties of Lower Silesian voivodship for the national economy and selected sections

County	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
	National economy	National economy	Industry	Trade	Hotels and restaurants	Professional, scientific and technical activity
Counties						
Polkowice	0.374	A	A	A	A	A
city of Wrocław	0.373	A	A	A	A	A
Lubin	0.320	A	A	A	B	A
city of Legnica	0.319	A	A	A	B	A
Wrocław	0.318	A	A	A	A	A
city of Jelenia Góra	0.318	A	A	A	A	A
Głogów	0.291	B	B	A	C	B
Zgorzelec	0.284	B	B	B	A	C
Wołów	0.270	B	B	B	C	C
Świdnica	0.269	B	B	B	C	C
Jelenia Góra	0.267	C	B	C	A	C
Oława	0.261	C	C	C	C	C
Wałbrzych	0.254	C	C	C	D	C
Bolesławiec	0.250	C	C	B	B	D
Oleśnica	0.248	C	C	C	B	D
Lubań	0.247	C	C	C	B	D
Trzebnica	0.245	C	C	C	D	C
Kłodzko	0.243	C	C	C	C	D

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

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

Commune	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
	National economy	National economy	Industry	Trade	Hotels and restaurants	Professional, scientific and technical activity
Urban communes						
Wrocław (u)	0.283	A	A	A	A	A
Lubin (u)	0.282	A	A	A	B	A
Chojnów (u)	0.279	A	A	A	C	A
Bolesławiec (u)	0.275	A	A	A	A	A
Zgorzelec (u)	0.275	A	A	A	A	A
Świdnica (u)	0.274	A	A	A	B	A
Głogów (u)	0.272	A	A	A	B	A
Karpacz (u)	0.268	A	A	A	A	A
Złotoryja (u)	0.266	A	A	A	A	A
Oleśnica (u)	0.263	A	A	A	A	A
Jawor (u)	0.259	A	A	A	B	A
Lubań (u)	0.258	A	A	A	A	A
Legnica (u)	0.258	A	A	A	A	A
Oława (u)	0.255	A	A	A	B	A
Jelenia Góra (u)	0.251	A	A	A	A	A
Polanica-Zdrój (u)	0.251	A	A	A	A	A
Kłodzko (u)	0.248	A	A	A	B	A
Kamienna Góra (u)	0.245	A	A	A	C	A
Dzierżoniów (u)	0.245	A	A	A	A	A
Świebodzice (u)	0.244	A	A	A	B	A
Duszniki-Zdrój (u)	0.243	A	A	A	A	A
Szczawno-Zdrój (u)	0.236	A	A	A	A	A
Wałbrzych (u)	0.235	A	A	A	B	A
Kudowa-Zdrój (u)	0.232	A	A	A	A	B
Kowary (u)	0.232	A	A	A	B	A
Bielawa (u)	0.229	A	A	A	C	A
Świeradów-Zdrój (u)	0.228	A	A	A	A	B
Piława Górna (u)	0.227	A	A	A	D	B
Boguszów-Gorce (u)	0.225	A	A	A	C	B
Jedlina-Zdrój (u)	0.225	A	A	A	A	B
Zawidów (u)	0.225	A	A	A	C	B
Piechowice (u)	0.223	A	A	A	A	B
Szklarska Poręba (u)	0.220	A	A	A	A	B
Nowa Ruda (u)	0.205	B	B	B	D	B

Pieszyce (u)	0.192	C	C	C	C	C
Rural communes						
Jerzmanowa (r)	0.270	A	A	A	A	A
Kobierzyce (r)	0.262	A	A	A	A	A
Rudna (r)	0.248	A	A	A	A	A
Lubin (r)	0.246	A	A	A	A	A
Grębocice (r)	0.241	A	A	A	C	B
Długołęka (r)	0.237	A	A	A	A	A
Czernica (r)	0.231	A	A	A	A	A
Warta Bolesławiecka (r)	0.224	A	A	A	C	B
Kunice (r)	0.219	B	A	B	A	A
Bolesławiec (r)	0.217	B	B	B	A	B
Podgórzyn (r)	0.208	B	B	B	A	B
Krośnice (r)	0.204	B	B	B	A	C
Czarny Bór (r)	0.204	B	B	B	B	C
Radwanice (r)	0.203	B	B	B	C	C
Malczyce (r)	0.202	B	B	C	C	C
Zgorzelec (r)	0.201	B	B	C	A	C
Wisznia Mała (r)	0.201	B	B	C	C	B
Legnickie Pole (r)	0.200	C	B	B	A	C
Siekierczyn (r)	0.199	C	B	B	B	C
Mietków (r)	0.199	C	B	B	C	D
Miękinia (r)	0.198	C	B	C	B	C
Kamieniec Ząbkowicki (r)	0.197	C	B	C	C	D
Głogów (r)	0.197	C	C	C	C	B
Walim (r)	0.196	C	B	C	B	C
Gromadka (r)	0.195	C	B	C	B	D
Mysłakowice (r)	0.191	C	C	C	A	C
Męcinka (r)	0.189	C	C	C	C	D
Żukowice (r)	0.187	C	C	C	D	C
Żórawina (r)	0.187	C	C	C	D	B
Oława (r)	0.185	C	C	D	C	C
Osiecznica (r)	0.185	C	C	B	A	E
Kłodzko (r)	0.184	C	C	D	A	D
Gaworzyce (r)	0.184	C	D	C	D	C
Złotoryja (r)	0.183	C	C	D	E	C
Świdnica (r)	0.183	C	C	D	A	D
Miłkowice (r)	0.182	C	C	D	D	C
Marcinowice (r)	0.181	C	C	D	B	D
Urban-rural communes						
Polkowice (u-r)	0.319	A	A	A	A	A
Brzeg Dolny (u-r)	0.265	A	A	A	A	A
Siechnice (u-r)	0.259	A	A	A	A	A
Bogatynia (u-r)	0.235	A	A	A	A	B

Strzegom (u-r)	0.233	A	A	A	A	B
Kąty Wrocławe (u-r)	0.232	A	A	A	A	A
Prochowice (u-r)	0.225	A	A	A	B	B
Radków (u-r)	0.222	A	A	B	B	B
Oborniki Śląskie (u-r)	0.222	A	A	A	A	A
Żarów (u-r)	0.221	A	A	A	C	B
Strzelin (u-r)	0.220	B	A	A	B	B
Jelcz-Laskowice (u-r)	0.219	B	B	B	C	A
Syców (u-r)	0.218	B	A	B	A	B
Wołów (u-r)	0.217	B	B	A	B	B
Środa Śląska (u-r)	0.216	B	B	B	A	B
Lądek-Zdrój (u-r)	0.215	B	B	A	A	B
Pieńsk (u-r)	0.215	B	B	B	B	C
Góra (u-r)	0.213	B	B	B	C	B
Lubawka (u-r)	0.210	B	B	B	B	B
Sobótka (u-r)	0.208	B	B	B	B	C
Stronie Śląskie (u-r)	0.208	B	B	B	A	B
Chocianów (u-r)	0.206	B	B	B	C	B
Ząbkowice Śląskie (u-r)	0.206	B	B	B	D	B
Szczytna (u-r)	0.204	B	B	B	A	C
Mieroszów (u-r)	0.202	B	B	B	A	D
Trzebnica (u-r)	0.202	B	B	B	C	B
Gryfów Śląski (u-r)	0.201	B	C	C	C	B
Przemków (u-r)	0.200	C	C	C	D	B
Głuszyca (u-r)	0.200	C	C	C	D	C
Milicz (u-r)	0.197	C	C	C	C	B
Ścinawa (u-r)	0.195	C	C	C	C	C
Żmigród (u-r)	0.195	C	C	C	B	C
Złoty Stok (u-r)	0.193	C	C	C	A	D
Węgliniec (u-r)	0.193	C	C	C	B	D
Bolków (u-r)	0.192	C	C	C	B	C
Olszyna (u-r)	0.192	C	C	C	C	C
Jaworzyna Śląska (u-r)	0.191	C	C	C	C	C
Twardogóra (u-r)	0.191	C	C	C	C	C
Nowogrodziec (u-r)	0.188	C	C	C	C	D
Leśna (u-r)	0.185	C	C	C	B	D
Niemcza (u-r)	0.183	C	C	D	D	C

(u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune

Source: As for Table 1.

Note: All the indices in the report have been calculated on the basis on the most up-to-date data from the Local Data Bank (RDB), 2014.

Table 4. Effects of special economic zone functioning at the end of 2013

SEZ	County, commune	Cumulated capital expenditure in million PLN (end of 2013)	New jobs number (end of 2013)	Leading industries (at least 20% share of revenue or employment)
Wałbrzych	Bolesławiec (u) Bolesławiec	192.28	446	rubber and plastic products, fabricated metal products (except machinery and equipment)
Legnica	Bolesławiec (r) Gromadka	182.54	326	food products, machinery and equipment n.e.c.
Kamienna Góra	Bolesławiec (u-r) Nowogrodziec	1 099.55	1 722	publishing services
Wałbrzych	Dzierżoniów (u) Bielawa	5.25	23	fabricated metal products (except machinery and equipment)
Wałbrzych	Dzierżoniów (u) Dzierżoniów	739.26	2 056	chemicals and chemical products, rubber and plastic products
Wałbrzych	Dzierżoniów (u) Piława Górna	0.00		no leading industry
Kamienna Góra	Jawor (u) Jawor	0.00		no leading industry
Kamienna Góra	Jelenia Góra (u) Piechowice	277.90	340	paper and paper products, other non-metallic mineral products
Kamienna Góra	Jelenia Góra (r) Janowice Wielkie	111.12	743	rubber and plastic products
Kamienna Góra	Kamienna Góra (u) Kamienna Góra	97.28	606	other non-metallic mineral products, motor vehicles (excluding motorcycles), trailers and semi-trailers
Kamienna Góra	Kamienna Góra (r) Kamienna Góra	215.00	554	motor vehicles (excluding motorcycles), trailers and semi-trailers
Kamienna Góra	Kamienna Góra (u-r) Lubawka	15.38	342	textile products
Wałbrzych	Kłodzko (u) Kłodzko	245.27	878	electrical and non-electrical household appliances
Wałbrzych	Kłodzko (u) Kudowa-Zdrój	14.95	100	fabricated metal products (except machinery and equipment)
Wałbrzych	Kłodzko (u) Nowa Ruda	45.78	248	rubber and plastic products, electrical and non-electrical household appliances
Wałbrzych	Kłodzko (u-r) Bystrzyca Kłodzka	0.00		no leading industry
Wałbrzych	Kłodzko (r) Kłodzko	0.00		no leading industry
Wałbrzych	Kłodzko (r) Nowa Ruda	23.28	0	electrical and non-electrical household appliances

Kamienna Góra	Lubań (u) Lubań	25.78	190	fabricated metal products (except machinery and equipment), machinery and equipment n.e.c.
Kamienna Góra	Lwówek (u-r) Gryfów Śląski	0.00		no leading industry
Wałbrzych	Strzelin (u-r) Strzelin	94.06	101	machinery and equipment n.e.c.
Wałbrzych	Strzelin (u-r) Wiązów	2.43	0	paper and paper products
Wałbrzych	Świdnica (u) Świdnica	1 083.32	2 305	chemicals and chemical products, electrical and non-electrical household appliances
Wałbrzych	Świdnica (u) Świebodzice	40.89	162	machinery and equipment n.e.c.
Wałbrzych	Świdnica (u-r) Strzegom	184.72	191	food products
Wałbrzych	Świdnica (r) Świdnica	0.00		no leading industry
Wałbrzych	Świdnica (u-r) Żarów	1 017.90	1 951	electrical and non-electrical household appliances, machinery and equipment n.e.c.
Wałbrzych	Wałbrzych* (u) Wałbrzych	4 452.65	6 651	motor vehicles (excluding motorcycles), trailers and semi-trailers
Wałbrzych	Ząbkowice Śląskie (u-r) Ząbkowice Śląskie	20.83	29	wood, wood and cork products, except furniture; articles of straw and plaiting materials
Kamienna Góra	**Zgorzelec (u) Zgorzelec**	**3.70**	**0**	fabricated metal products (except machinery and equipment)
Legnica	**Złotoryja (u) Złotoryja**	**54.41**	**102**	rubber and plastic products, other non-metallic mineral products, computers, electronic and optical products
Kamienna Góra	city of Jelenia Góra (u) Jelenia Góra	5.34	4	other non-metallic mineral products
Legnica	Głogów (u) Głogów	0.65	0	other non-metallic mineral products
Wałbrzych	Góra (u-r) Góra	3.75	2	fabricated metal products (except machinery and equipment)
Legnica	Legnica (u) Chojnów	57.22	166	machinery and equipment n.e.c., other individual services
Legnica	Legnica (r) Chojnów	0.00		no leading industry
Legnica	Legnica (r) Legnickie Pole	469.13	987	fabricated metal products (except machinery and equipment), motor vehicles

				(excluding motorcycles), trailers and semi-trailers
Legnica	Legnica (u-r) Prochowice	0.00		no leading industry
Legnica	Lubin (u) Lubin	0.00		no leading industry
Legnica	Polkowice (u-r) Polkowice	3 642.85	3 938	motor vehicles (excluding motorcycles), trailers and semi-trailers
Legnica	Polkowice (u-r) Przemków	0.00		no leading industry
Wałbrzych	Wołów (u-r) Brzeg Dolny	290.38	290	chemicals and chemical products
Wałbrzych	Wołów (u-r) Wołów	27.17	58	rubber and plastic products
Legnica	city of Legnica (u) Legnica	1 348.98	3 540	rubber and plastic products, fabricated metal products (except machinery and equipment), motor vehicles (excluding motorcycles), trailers and semi-trailers
Wałbrzych	Oleśnica (u) Oleśnica	50.07	38	motor vehicles (excluding motorcycles), trailers and semi-trailers
Kamienna Góra	Oleśnica (r) Dobroszyce	0.00		no leading industry
Wałbrzych	Oleśnica (u-r) Syców	0.00		no leading industry
Wałbrzych	Oleśnica (u-r) Twardogóra	0.00		no leading industry
Wałbrzych	Oława (u) Oława	1 232.12	1 517	paper and paper products, electrical and non-electrical household appliances
Wałbrzych	Oława (u-r) Jelcz-Laskowice	1 539.63	2 881	motor vehicles (excluding motorcycles), trailers and semi-trailers
Wałbrzych	Oława (r) Oława	174.14	130	food products, other non-metallic mineral products
Legnica	Środa Śląska (r) Miękinia	0.00		no leading industry
Legnica	Środa Śląska (u-r) Środa Śląska	546.66	924	other non-metallic mineral products, motor vehicles (excluding motorcycles), trailers and semi-trailers
Kamienna Góra	Trzebnica (u-r) Prusice	0.00		no leading industry
Kamienna Góra	Trzebnica (u-r) Żmigród	44.16	32	fabricated metal products (except machinery and equipment)
Wałbrzych	Wrocław (r) Długołęka	0.00		no leading industry
Tarnobrzeg/ Wałbrzych	Wrocław (r) Kobierzyce	4 106.77	8 441	computers, electronic and optical products

Wałbrzych	city of Wrocław (u) Wrocław	1 380.29	5 134	chemicals and chemical products, rubber and plastic products

Source: Authors' own calculations based on the Ministry of Economy data. Notice: (u) – city commune, (u-r) urban-rural commune, (r) rural commune.

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