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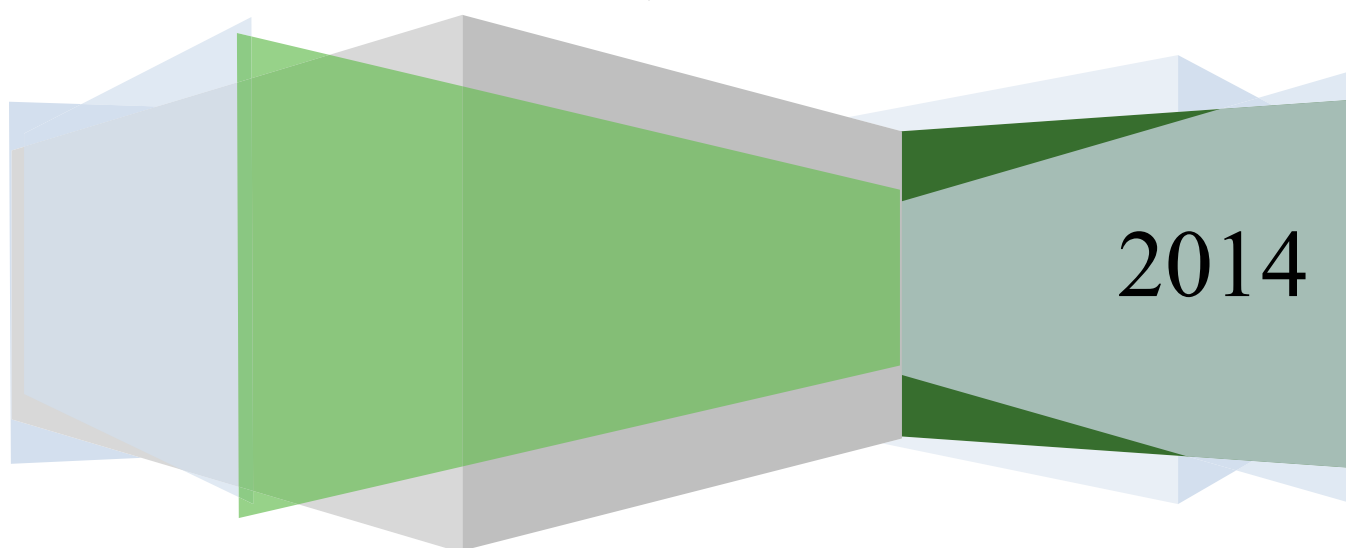


REGIONAL INVESTMENT ATTRACTIVENESS 2014

Łódź Voivodship

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Polish Information and Foreign Investment Agency (PAIiZ) is a governmental institution and has been servicing investors since 1992. Its mission is to create a positive image of Poland in the world and increase the inflow of foreign direct investments by encouraging international companies to invest in Poland. PAIiZ is a useful partner for foreign entrepreneurs entering the Polish market. The Agency guides investors through all the essential administrative and legal procedures that involve a project. It also provides rapid access to complex information relating to legal and business matters regarding investments. Moreover, it helps in finding the appropriate partners and suppliers together with new locations.

PAIiZ provides free of charge professional advisory services for investors, including:

- investment site selection in Poland,
- tailor-made investors visits to Poland,
- information on legal and economic environment,
- information on available investment incentives,
- facilitating contacts with central and local authorities,
- identification of suppliers and contractors,
- care of existing investors (support of reinvestments in Poland).

Besides the **OECD National Contact Point**, PAIiZ also maintains an Information Point for companies which are interested in European Funds. All of the Agency's activities are supported by the **Regional Investor Assistance Centres**. Thanks to the training and ongoing support of the Agency, the Centres provide complex professional services for investors at voivodship level.

On the website **www.paiz.gov.pl** an investor can find all the necessary information concerning key facts about Poland, Polish economy, legal regulations in Poland and detailed information which could be useful for any company wanting to set up a business in Poland.

Since 2011 China – Poland Economic Cooperation Centre operates in PAIiZ as a "one-stop shop" providing comprehensive information on investment opportunities in Poland and offering support for Chinese companies during the investment process. The Centre is responsible for: promotion of Poland as a location for FDI, identifying sources of foreign direct investment, supporting the missions and delegations from China, preparing analysis & information, maintaining regular contact with Chinese companies operating in Poland, Go China Project. More information you can find on: **www.gochina.gov.pl**.

Also since 2013 PAIiZ is implementing the **“Go Africa”** program. Its aim is to encourage Polish entrepreneurs to enter the African markets and to promote Poland in Africa. Therefore PAIiZ is organizing: fact finding missions to African countries, participation of Polish entrepreneurs in fairs, conferences, seminars and workshops both in Poland and in Africa. Furthermore the Agency is preparing publications on African markets. More information you can find on: **www.goafrica.gov.pl**.

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 Łódź 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 voidships, 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 ŁÓDŹ VOIVODSHIP

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

The advantages of the voivodship are:

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

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

Table 1. General characteristics of the economy of Łódź voivodship

Feature		Łódź voivodship	Poland	Share [%]
Market Potential				
GDP per capita 2012 (PLN/person)		38656.0	41439.1	-
Population (persons) on 31 December 2013		2513093	38495659	6,5%
Human Resources Potential				
Higher education institutions graduates (persons) in 2013		25846	454986	5,7%
Secondary schools graduates (persons) in 2013		17365	271333	6,4%
Number of employed persons in 2013		1248	15568	8,0%
Structure of employed persons in 2013		agriculture 13.2% industry 31.6% services 55.2%	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		2565.1	79942.6	3.2%
Capital of companies (PLN n) in 2012		5096.1	206992.3	2.5%
Special Economic Zones (SEZs) in the voivodship*				
– Łódź – Starachowice				
Distinguishing investment attractiveness ratings PAI_2 and RAI (class A, B and C)				
Potential investment attractiveness PAI_2		National economy class C Capital-intensive industry class C Labour-intensive industry class C Trade class C		
Real investment attractiveness RAI		National economy class C Trade class B Tourism class C		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)				
Counties	Class A	Bełchatów, city of Skierniewice, city of Łódź, city of Piotrków Trybunalski		
	Class B			
Communes	Class A	Bełchatów (u), Rawa Mazowiecka (u), Pabianice (u), Łódź (u), Skierniewice (u), Piotrków Trybunalski (u), Zgierz (u), Tomaszów Mazowiecki (u), Łowicz (u), Konstantynów Łódzki (u), Kutno (u), Brzeziny (u), Zduńska Wola (u), Łęczyca		

		(u), Radomsko (u), Kleszczów (r), Andrespol (r), Nowosolna (r), Ksawerów (r), Aleksandrów Łódzki (u-r), Rzgów (u-r)
	Class B	Głowno (u), Sieradz (u), Ozorków (u), Pabianice (r), Sulmierzyce (r), Rawa Mazowiecka (r), Szczerców (r), Stryków (u-r), Tuszyn (u-r), Wieluń (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 2513093 (as of 2013), which is 6.5% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 17% of the population at pre-productive age, 62.4% at productive age and 20.6% 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 29 higher education institutions in which there are 92153 students studying, which makes up 6% of all students in Poland. Moreover, 5.2% of the secondary school students in the voivodship attend vocational schools and 5.8% attend technical schools.

The registered unemployment rate in the voivodship amounted to 12.4% 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 3546.3, which is 95.9% of the average for Poland.

In 2012 Lower Silesian voivodship made a contribution of 6.1 % to the GDP of Poland. Calculated per capita, it amounted to PLN 38656.0 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 183.4% 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 a share of the service sector at the level of 55.2% whereas a share of the agricultural and industrial sectors are respectively 13.2% and 31.6% (Central Statistical Office, Local Data Bank 2014).

In the structure of voivodship's industry important role is played by: manufacture of food products (24% of sold production of the whole voivodship's industry at the end of 2013), manufacture of rubber and plastic products (7%), manufacture of other non-metallic mineral products (6%).

The region is the leading manufacturer of wearing apparel (31% of country's sold production in 2013), textiles (24%), pharmaceuticals (13%), other non-metallic mineral products (11%), food products (8%), rubber and plastic products (7%). It also has a 7% share in country's market of printing and reproduction of recorded media.

The voivodship improved its competitive position within the last three years (measured by its share in the country's sold production)², when it comes to the following sectors:

- manufacture of food products,
- manufacture of rubber and plastic products,
- manufacture of metal (except machinery and equipment),
- manufacture of furniture,
- manufacture of pharmaceuticals,
- manufacture of motor vehicles (excluding motorcycles), trailers and semi-trailers,
- manufacture of computers, electronic and optical products,
- manufacture of other non-metallic products,
- manufacture of paper and paper products.

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: energy production, logistics, textile manufacture, agri-food industry, construction, chemical industry, biotechnology.

For the entrepreneurs willing to invest in Łódź voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Łódź voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include textile, wearing apparel and knitting industry, advanced building materials, medicine, pharmacy, cosmetics, energy production (including renewable energy sources), innovative agriculture and agri-food industry, media, informatics and telecommunications, mechatronics.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Katowice SEZ, Łódź SEZ and Starachowice SEZ in the following subzones:**

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

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

In the all above-mentioned locations investors can benefit from tax allowances amounting to 35% - 55%, 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

Łódź voivodship is one of the Polish voivodships characterised by a high investment attractiveness, which is indicated by the high index of potential investment attractiveness PAI_2 for the national economy, especially for capital- or labour-intensive investments in industry and trade. The investments' effects measured with the index of real investment attractiveness indicate that the voivodship offers favourable conditions for conducting business, especially when it comes to trade and tourism and catering.

In the years 2003-2011 the Łódź voivodship's market share measured with the value of foreign capital in the above mentioned companies rose from 2.1% to 2.7%.

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 in Poland and EU, results of research are incomparable. This is because not all data are available for voivodships, communes and counties, e.g. not all regions collect current information about the 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 E), compared to the EU regions, taking 198th place of 270 regions, for whom the indices were calculated. However, compared to the previous year, the voivodship increased its position by 6 places. Łódź voivodship has a competitive advantage, when it comes to human capital microclimate, ranked class B.

Łódź voivodship is more attractive than EU regions such as:

- **in Belgium:** Prov. Luxembourg;

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 United Kingdom:** West Wales and The Valleys, Cornwall and Isles of Scilly, Lincolnshire;
- **in Bulgaria:** Severoiztochen, Yugoiztochen, Severen tsentralen, Yuzhen tsentralen, Severozapaden;
- **in the Czech Republic:** Střední Morava, Severozápad;
- **in France:** 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:** Andalucía, Illes Balears, Canarias, Castilla-La Mancha, Región de Murcia, Extremadura;
- **in Germany:** Lüneburg;
- **in Portugal:** 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 Hungary:** Nyugat-Dunántúl, Közép-Dunántúl, Dél-Dunántúl, Észak-Magyarország, Dél-Alföld, Észak-Alföld;
- **in Italy:** 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.

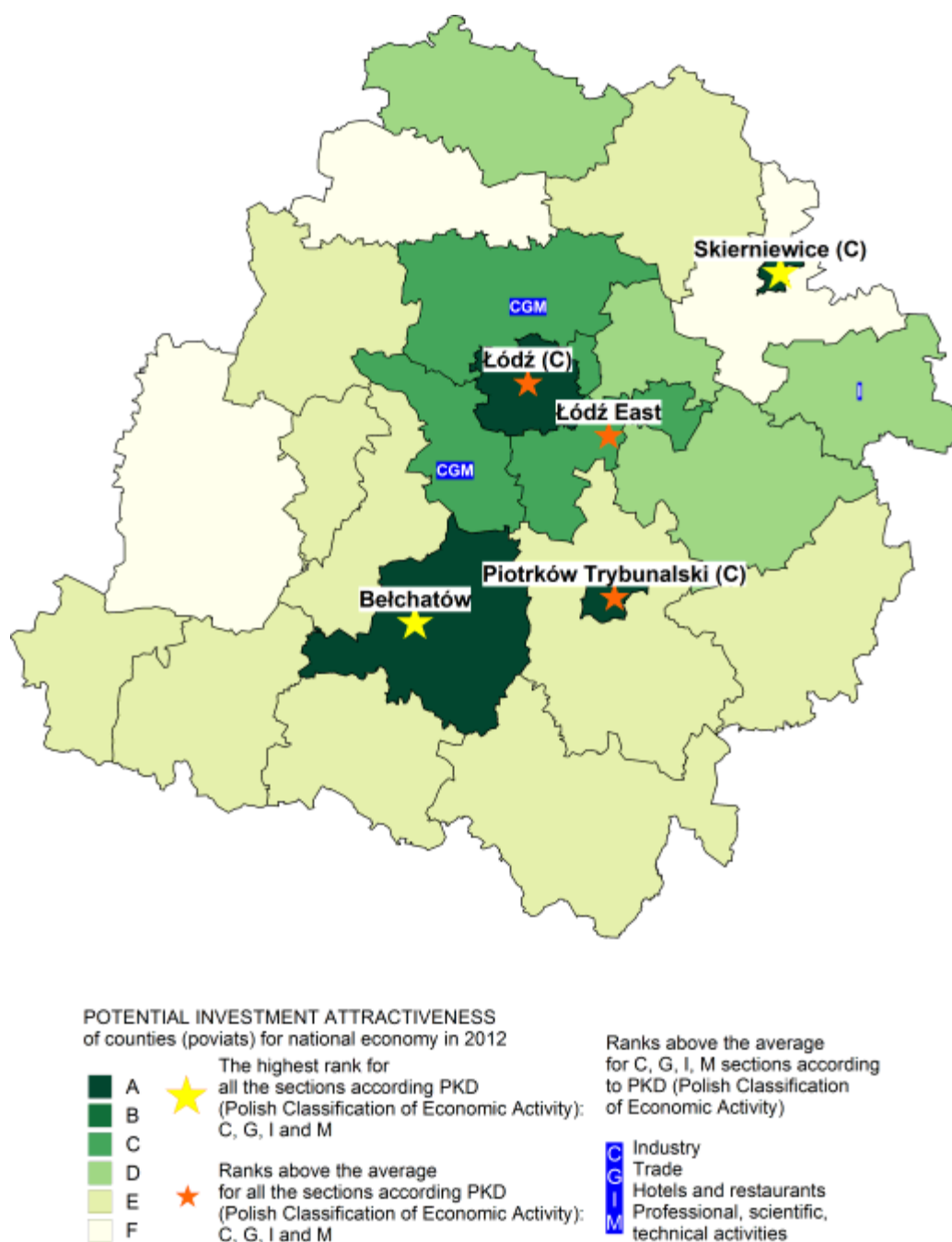
An **orange star** means that a county or a commune was rated above average in all the sections analysed (national economy, industry, trade, tourism and professional services) and the **golden star** is the highest distinction and means that all the rated sections in a particular commune or county were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

When it comes to counties, the highest ranked city county was Skierniewice, and when it comes to land counties: Bełchatów, Łódź East (all of them distinguished with **golden stars**) as well as city counties Łódź and Piotrków Trybunalski (distinguished with **orange stars**).

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

- **distinguished with a golden star::** Rawa Mazowiecka (u), Skierniewice (u),
- **distinguished with an orange star:** Bełchatów (u), Brzeziny (u), Głowno (u), Konstantynów Łódzki (u), Kutno (u), Łowicz (u), Łódź (u), Pabianice (u), Piotrków Trybunalski (u).

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

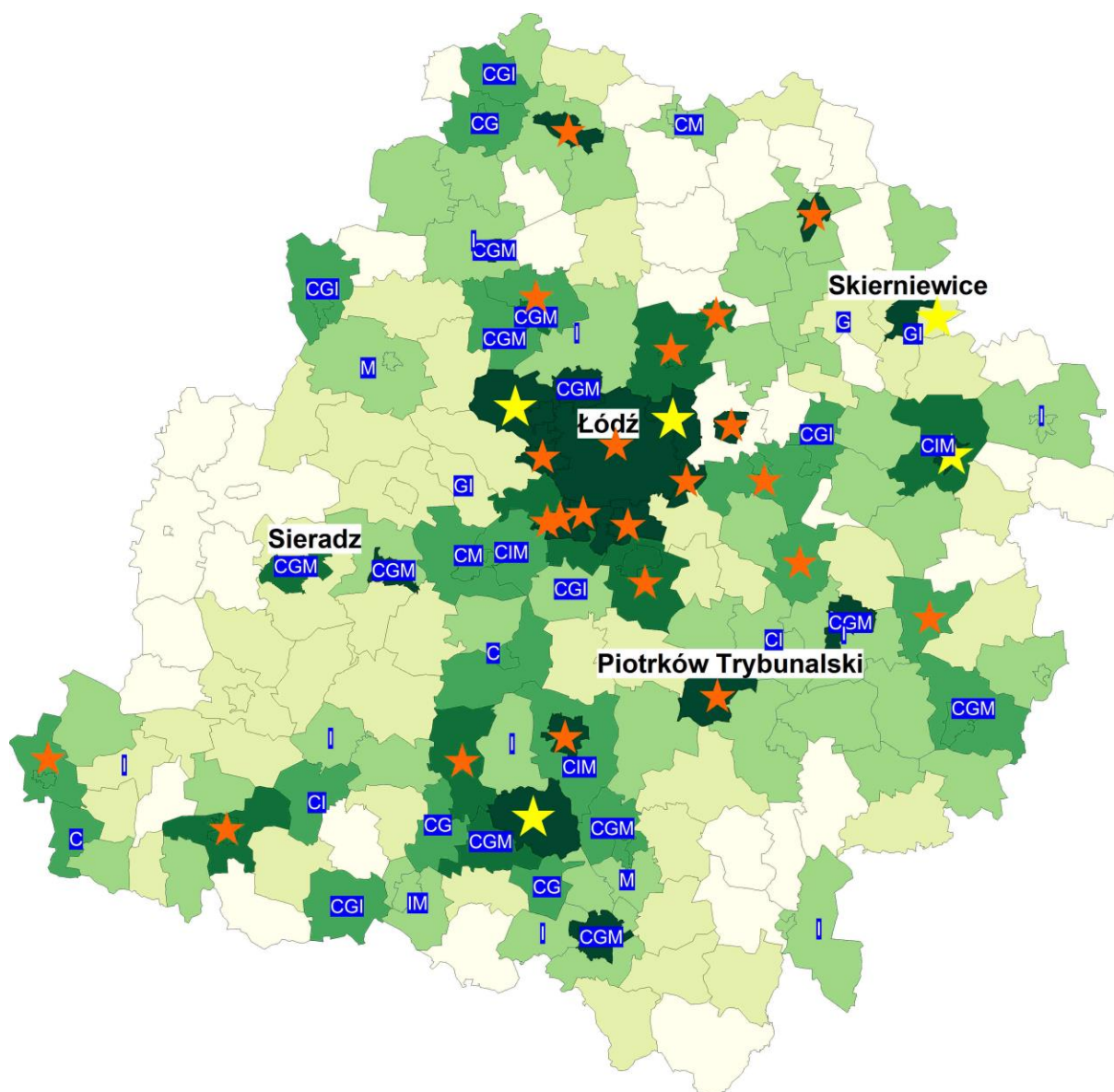


Golden star counties:

Bełchatów, Skierniewice

Source: Authors' own work.

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



POTENTIAL INVESTMENT ATTRACTIVENESS
of communes (gminas) for national economy in 2012

- | | |
|--|---|
| <ul style="list-style-type: none"> A B C D E F | <ul style="list-style-type: none"> The highest rank for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M Ranks above the average for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M |
|--|---|

Ranks above the average for C, G, I, M sections according to PKD (Polish Classification of Economic Activity)

C Industry
G Trade
I Hotels and restaurants
M Professional, scientific, technical activities

Golden star communes:

Aleksandrów Łódzki (u-r), Kleszczów (r), Nowosolna (r), Rawa Mazowiecka (u), Skierniewice (r)

Source: Authors' own work

Among rural communes the highest rank communes include:

- **golden star communes::** Kleszczów (r) Nowosolna (r) and
- **orange star communes:** Andrespol (r), Inowłódz (r), Ksawerów (r), Ozorków (r), Pabianice (r), Szczerców (r), Ujazd (r).

Among urban-rural communes the highest rank communes include:

- **golden star communes::** Aleksandrów Łódzki (u-r),
- **orange star communes:** Koluszki (u-r), Rzgów (u-r), Stryków (u-r), Tuszyn (u-r), Wieluń (u-r), Wieruszów (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.

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 Łódź voivodship such centre is:

the Investor Services Centre operating within
Marshall's Office of Łódź Voivodship
www.biznes.lodzkie.pl



Łódź Investor Services 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:

Voivodship's Association of Chambers of Commerce (*Wojewódzkie Porozumienie Izb Gospodarczych*) (<http://www.rig.kutno.pl/>)

The Voivodship's Association of Chambers of Commerce's members are: Regional Chamber of Commerce in Kutno, Regional Chamber of Commerce in Łódź, Regional Chamber of Construction in Łódź, Regional Chamber of Commerce in Piotrków Trybunalski, Skierniewice Chamber of Commerce, Tomaszów Region Chamber of Commerce. The main aim of the association is representing economic environment and its interests towards voivodship's authorities and dynamization of works on the shape of economic self-government and its participation in Łódź region's economic life.

Łódź Chamber of Commerce and Trade (*Łódzka Izba Przemysłowo-Handlowa*) (www.liph.com.pl)

The chamber brings together over 300 business units, to whom it offers various services. The main goal of the chamber is taking care for interests of its members and promoting entrepreneurship. The chamber's offer includes i.a.: supporting economic initiatives, taking part in the government and EU programmes, informing of chamber's members activities and promoting domestic production and exports. The chamber is a shareholder of Łódź Regional Science and Technology Park.

Foundation for Entrepreneurship Development in Łódź (*Fundacja Rozwoju Przedsiębiorczości w Łodzi*) (www.frp.lodz.pl)

The foundation takes up activities that aim at integration of business environment, development of innovations, cooperation with enterprises and R&D units, transfer of knowledge and technology, creation of knowledge-based economy and supporting European integration. The foundation offers i.a.: training services (including customized trainings on special orders), consulting services (such as technology, innovation and exports audit) and information services. It also organizes courses for Supervisory Boards members. The

foundation issues monthly information bulletin, organizes Entrepreneurship Forum meetings and organizes Science for Business meetings.

Łódź Regional Research and Technology Park (*Łódzki Regionalny Park Naukowo-Technologiczny Sp. z o.o.*) (<http://www.technopark.lodz.pl/>)

The Łódź Technopark offer includes i.a.: transfer of modern technology from science to business (BioNanoPark – implementation centre including Industrial Biotechnology Laboratory, Molecular and Nanostructural Biophysics Laboratory and Implants Laboratory concentrating on individual medical implants) and assistance for young enterprises (Technology Incubator). The park offers preferential conditions of land leasing – the investment area was splitted into 22 investment plots of various sizes. They are included into the Local Spatial Development Plan – the area is assigned for services, non-intrusive production and hotel buildings.

Bełchatów-Kleszczów TechnoIndustrial Park (*Bełchatowski Kleszczowski Park Przemysłowo Technologiczny Sp. z o.o.*) (<http://www.ppt.belchatow.pl/>)

Using the local infrastructure, the park enables conducting business on preferential conditions, especially by small and medium entrepreneurs. The park's offer includes i.a.: investment plots leasing and selling for domestic and foreign entrepreneurs, possibility of renting space in Technology Incubator, access to infrastructure and professional ancillary services (information, training, consulting, innovation and pro-innovation services), technology transfer services, as well as assistance while seeking for financial funds (including EU funds).

4.2. SPECIAL ECONOMIC ZONES IN THE VOIVODSHIP – EFFECTS

There are 3 special economic zones (SEZs) in Łódź voivodship: Łódź SEZ, Starachowice SEZ and Katowice SEZ. At the end of 2013 the areas of the SEZs were parts of 15 cities and 20 communes – see Chart 5.

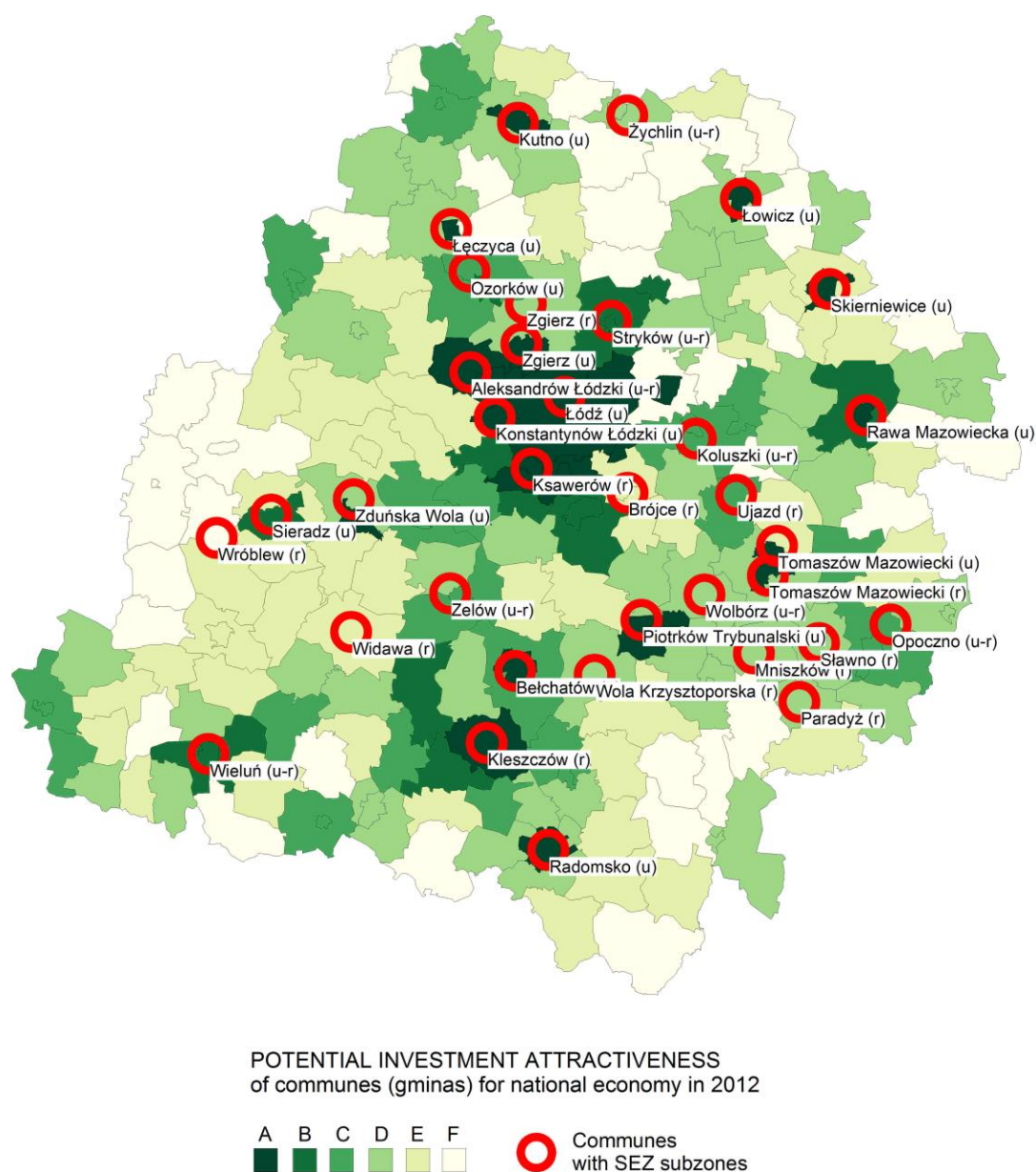
The first SEZ areas were brought into life in 1998. The investment outlays made by SEZ companies operating in the communes of Łódź by the end of 2012 amounted to PLN 8.7 billion, which made 10% of all investment outlays made in the Polish SEZs. In the same time the SEZ companies in the region created 17.3 thousand new jobs which made 9% of all jobs created in the Polish SEZs (see Table 4).

The largest investments in voivodship's SEZs have been completed in Łódź. Investments from numerous branches have been located here, such as: food industry (Dakri Sp. z o.o., Pifo Eko. Strefa Sp. z o.o.), plastic (COKO, Werk Polska Sp. z o.o., Wirthwein Polska Sp. z o.o., Hirsch Porozell Sp. z o.o., MECALIT POLSKA Sp. z o.o., CKM Technologie), BPO (Fujitsu Services Sp. z o.o., Business Support Solution S.A.), packaging (Albea Poland Sp. Z o.o., Schaumaplast, Organika Sp. z o.o., AMCOR FLEXIBLES REFLEX Sp. z o.o., medical (MDH Sp. z o.o.), cosmetics (Gillette Poland International Sp. z o.o. Delia Cosmetics

Distribution), IT (DELL Products (Poland) Sp z o.o., Ericpol Telecom Sp. z o.o., AMG lab), automotive industry (P.H/U, Bilex Sp. z o.o. ABB Sp. z o.o.), metal products (Bobrus Maszyny Poligraficzne Sp. z o.o.), household appliances (BSH Sprzęt Gospodarstwa Domowego Sp. z o.o. Grupa Bosch-Siemens, Coko-Werk Polska Sp. z o.o.).

The voivodship intends to attract investors from R&D, the hi-tech, household appliances, pharmaceutical and cosmetics and construction material industries sectors – both for Łódź SEZ and Starachowice SEZ.

Chart 5. The location of SEZs in Łódź voivodship



Source: Authors' own work.

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 2 are situated in Łódź voivodship: Stryków (r) and Łódź (u). Both communes distinguish themselves with high rates of their websites, including i.a. information on available investment plots and Spatial Development Plans. It is worth pointing out that both communes answered English e-mails very well, informing the potential investor on procedures of setting a business by a foreigner, preferential solutions for new enterprises and on available office space. City of Łódź was distinguished by the title of 'A' Commune for the next time this year.

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	Professional, 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
SUBCARPATHIAN	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-MASURIAN	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						
Bełchatów	0,332	A	A	A	A	A
city of Skierniewice	0,322	A	A	A	A	A
city of Łódź	0,315	A	A	A	B	A
city of Piotrków Trybunalski	0,302	A	A	A	C	A
Łódź East	0,263	C	B	B	B	C
Zgierz	0,255	C	B	C	D	C
Pabianice	0,252	C	C	C	D	C

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

	PAII_GN	PAII_GN	PAII_C	PAII_G	PAII_I	PAII_M
Commune	National economy	National economy	Industry	Trade	Hotels and restaurants	Professional, scientific and technical activity
Urban communes						
Bełchatów (u)	0.265	A	A	A	B	A
Rawa Mazowiecka (u)	0.263	A	A	A	A	A
Pabianice (u)	0.260	A	A	A	B	A
Łódź (u)	0.259	A	A	A	B	A
Skierniewice (u)	0.256	A	A	A	A	A
Piotrków Trybunalski (u)	0.245	A	A	A	C	A
Zgierz (u)	0.241	A	A	A	D	A
Tomaszów Mazowiecki (u)	0.240	A	A	A	D	A
Łowicz (u)	0.231	A	A	A	C	A
Konstantynów Łódzki (u)	0.231	A	A	A	C	A
Kutno (u)	0.228	A	A	A	B	A
Brzeziny (u)	0.227	A	A	A	C	B
Zduńska Wola (u)	0.225	A	A	A	D	A
Łęczyca (u)	0.222	A	A	A	D	A
Radomsko (u)	0.222	A	A	B	D	A
Główno (u)	0.217	B	A	B	B	B
Sieradz (u)	0.213	B	B	B	D	A
Ozorków (u)	0.207	B	B	B	D	B
Rural communes						
Kleszczów (r)	0.352	A	A	A	A	A
Andrespol (r)	0.238	A	A	A	B	A
Nowosolna (r)	0.235	A	A	A	A	A
Ksawerów (r)	0.226	A	A	A	C	B
Pabianice (r)	0.220	B	B	B	A	C
Sulmierzyce (r)	0.206	B	B	B	D	C
Rawa Mazowiecka (r)	0.204	B	B	D	B	C
Szczerców (r)	0.204	B	B	C	C	C
Nowe Ostrowy (r)	0.199	C	B	B	B	D
Rząśnia (r)	0.197	C	C	C	D	D
Ozorków (r)	0.196	C	B	B	B	C
Jeżów (r)	0.195	C	C	B	B	D
Ujazd (r)	0.194	C	C	C	B	C
Parzęczew (r)	0.193	C	C	C	D	C
Inowłódz (r)	0.191	C	C	A	A	C

Bolesławiec (r)	0.189	C	C	D	D	D
Bełchatów (r)	0.187	C	C	D	B	C
Lgota Wielka (r)	0.187	C	C	C	E	D
Dobroń (r)	0.183	C	C	D	B	C
Osjaków (r)	0.183	C	C	D	B	D
Urban-rural communes						
Aleksandrów Łódzki (u-r)	0.240	A	A	A	A	A
Rzgów (u-r)	0.230	A	A	A	A	B
Stryków (u-r)	0.218	B	A	A	A	C
Tuszyn (u-r)	0.210	B	B	A	A	C
Wieluń (u-r)	0.201	B	B	B	B	B
Koluszki (u-r)	0.199	C	C	C	C	C
Kamieńsk (u-r)	0.197	C	C	C	D	C
Wieruszów (u-r)	0.197	C	C	C	C	B
Krośniewice (u-r)	0.194	C	C	C	D	D
Uniejów (u-r)	0.192	C	C	C	A	D
Opoczno (u-r)	0.190	C	C	C	D	C
Działoszyn (u-r)	0.187	C	C	C	C	D
Zelów (u-r)	0.186	C	C	D	D	D
Łask (u-r)	0.185	C	C	D	E	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 (LDB), 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)
Łódź	Kutno (u) Kutno	1 066.96	862	food products, rubber and plastic products
Łódź	Kutno (u-r) Żychlin	0.00		no leading industry
Łódź	Łask (r) Widawa	22.80	10	basic pharmaceutical products and pharmaceutical preparation
Łódź	Łęczyca (u) Łęczyca	219.42	921	rubber and plastic products
Łódź	Łódź East (r) Brójce	0.00		no leading industry
Łódź	Łódź East (u-r) Koluszki	0.00		no leading industry
Łódź	Pabianice (u) Konstantynów Łódzki	108.22	81	chemicals and chemical products, rubber and plastic products
Łódź	Pabianice (r) Ksawerów	235.08	530	textile products, basic pharmaceutical products and pharmaceutical preparation
Łódź	Sieradz (u) Sieradz	114.99	320	basic pharmaceutical products and pharmaceutical preparation
Łódź	Sieradz (r) Wróblew	23.32	0	other non-metallic mineral products
Łódź	wieluński (u-r) Wieluń	87.33	60	motor vehicles (excluding motorcycles), trailers and semi-trailers
Łódź	Zduńska Wola (u)	30.65	126	wearing apparel

Zduńska Wola				
Łódź	Zgierz (u) Ozorków	555.99	1 374	paper and paper products, other non-metallic mineral products
Łódź	Zgierz (u) Zgierz	160.17	296	other non-metallic mineral products
Łódź	Zgierz (u-r) Aleksandrów Łódzki	419.47	599	chemicals and chemical products, electrical equipment and non-electric household appliances
Łódź	Zgierz (u-r) Stryków	381.15	299	paper and paper products
Łódź	Zgierz (r) Zgierz	0.00		no leading industry
Łódź	Bełchatów (u) Bełchatów	0.00		no leading industry
Łódź	Bełchatów (r) Kleszczów	41.14	0	metals
Łódź	Bełchatów (u-r) Zelów	0.00		no leading industry
Łódź	Łowicz (u) Łowicz	10.98	16	chemicals and chemical products
Starachowice	Opoczno (r) Mniszków	29.82	40	other non-metallic mineral products
Łódź	Opoczno (u-r) Opoczno	27.31	32	other non-metallic mineral products
Łódź	Opoczno (r) Paradyż	198.88	25	other non-metallic mineral products
Łódź	Opoczno (r) Sławno	2.51	0	other non-metallic mineral products
Łódź	Piotrków Trybunalski (r) Wola Krzysztoporska	0.00		no leading industry
Łódź	Piotrków Trybunalski	38.79	76	storage and support activities for

	(r) Wolbórz			transportation
Łódź	Radomsko (u) Radomsko	967.64	2 368	electrical equipment and non-electric household appliances
Łódź	Rawa Mazowiecka (u) Rawa Mazowiecka	93.36	269	other non-metallic mineral products, fabricated metal products (except machinery and equipment), furniture
Łódź	Tomaszów Mazowiecki (u) Tomaszów Mazowiecki	216.69	343	food products
Łódź	Tomaszów Mazowiecki (r) Tomaszów Mazowiecki	276.77	465	other non-metallic mineral products
Łódź	Tomaszów Mazowiecki (r) Ujazd	0.00		no leading industry
Łódź	city of Piotrków Trybunalski (u) Piotrków Trybunalski	366.78	1 478	metals
Łódź	city of Skierniewice (u) Skierniewice	2.31	0	rubber and plastic products
Łódź	city of Łódź (u) Łódź	2 960.56	7 565	fabricated metal products (except machinery and equipment), electrical equipment and non-electric household appliances

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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