

Warsaw School of Economics

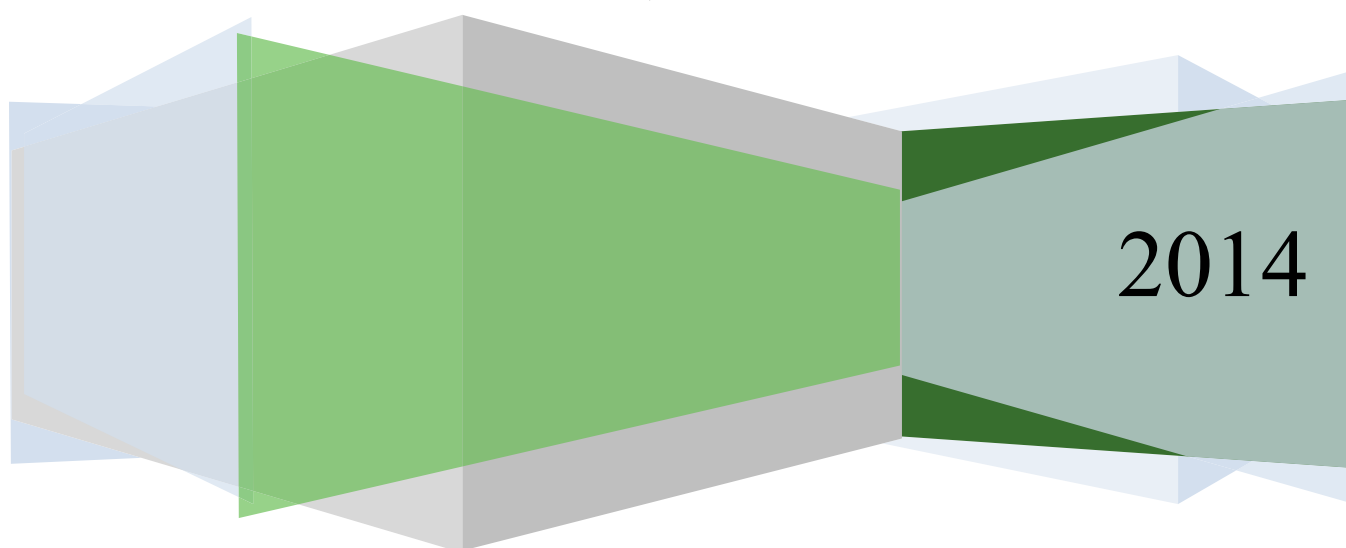


# REGIONAL INVESTMENT ATTRACTIVENESS 2014

## Opole 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](http://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](http://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](http://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 Opole 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.<sup>1</sup>

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.

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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 OPOLE (OPOLE) VOIVODSHIP

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

**The advantages of the voivodship are also:**

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

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

**Table 1. General characteristics of the economy of Opole voivodship**

Feature		Opole voivodship	Poland	Share [%]
Market Potential				
GDP per capita 2012 (PLN/person)		33071.0	41439.1	-
Population (persons) on 31 December 2013		1004416	38495659	2.6%
Human Resources Potential				
Higher education institutions graduates (persons) in 2013		10850	454986	2.4%
Secondary schools graduates (persons) in 2013		6119	271333	2.3%
Number of employed persons in 2013		346	15568	2.2%
Structure of employed persons in 2013		agriculture 11.9% industry 36.3% services 51.8%		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		950.8	79942.6	1.2%
Capital of companies (PLN n) in 2012		1708.4	206992.3	0.8%
Special Economic Zones (SEZs) in the voivodship *				
– Katowice SEZ – Starachowice SEZ – Wałbrzych SEZ				
Distinguishing investment attractiveness ratings PAI_2 and RAI (class A, B and C)				
Potential investment attractiveness PAI_2				
Real investment attractiveness RAI		Trade class C		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)				
Counties	Class A	city of Opole		
	Class B			
Communes	Class A	Brzeg (u), Opole (u), Kędzierzyn-Koźle (u), Skarbimierz (r), Tułowice (r), Dobrzeń Wielki (r), Zdzeszowice (u-r), Prudnik (u-r), Namysłów (u-r), Gogolin (u-r)		
	Class B	Chrzastowice (r), Bierawa (r), Łubniany (r), Nysa (u-r), Krapkowice (u-r), Kluczbork (u-r), Ujazd (u-r), Grodków (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 1 004 416 (as of 2013), which is 7.6% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 16.4% of the population at pre-productive age, 64.7% at productive age and 18.9% 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 6 higher education institutions in which there are 30 975 students studying, which makes up 2% of all students in Poland. Moreover, 3.1% of the secondary school students in the voivodship attend vocational schools and 2.7% attend technical schools.

The registered unemployment rate in the voivodship amounted to 12.3% 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 3 488.1, which is 92.5% of the average for Poland.

In 2012 Opole voivodship made a contribution of 2.1% to the GDP of Poland. Calculated per capita, it amounted to PLN 3 307.1 with the average for Poland PLN 4 143.1. With this result the voivodship takes the 11th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 179.2% while the average for Poland amounted to 189.2%.

The structure of employment in the voivodship is characterised by a share of the service sector 51.8% whereas a share of the agricultural and industrial sectors are respectively 11.9% and 36.3% (Central Statistical Office, Local Data Bank 2014).

In the structure of voivodship's industry important role is played by: manufacture of food products (16% of sold production of the whole voivodship's industry at the end of 2013), manufacture of chemicals and chemical products (16%), manufacture of other non-metallic mineral products (14%) and manufacture of motor vehicles, trailers and semi-trailers (7%).

As the voivodship is one of the smallest regions the voivodship has strong position only on chemical and chemical products market (16% of country's sold production at the end of 2013).

When it comes to most of the above-mentioned sectors, the voivodship improved or maintained its competitive position within the last three years (measured by its share in the country's sold production)<sup>2</sup>. It applies to the following sectors: chemical industry, agri-food industry, construction, energy production, machinery production, metal industry, timber industry and non-metallic resources industry.

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<sup>2</sup> Calculations based on the Statistic Bulletin of the Opole Voivodship from the 1st quarter of 2014 and Statistical Bulletin, I quarter of 2014, [www.stat.gov.pl](http://www.stat.gov.pl) (10 November 2014).

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: food industry, chemical industry and construction.

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

- **Katowice SEZ in subzones:** Głuchołazy (u-r), Gogolin (u-r), Kędzierzyn-Koźle (u), Kietrz (u-r), Krapkowice (u-r), Olesno (u-r), Strzelce Opole (u-r), Ujazd (u-r),
- **Starachowice SEZ in subzones:** Tułowice (r),
- **Wałbrzych SEZ in subzones:** Kluczbork (u-r), Namysłów (u-r), Nysa (u-r), Opole (u), Praszka (u-r), Prudnik (u-r), Skarbimierz (r).

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](http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ).

## 1. REGION'S RANK IN TERMS OF INVESTMENT ATTRACTIVENESS IN POLAND AND IN THE EUROPEAN UNION

Opole voivodship is one of the less attractive regions in Poland (class E). Ranks slightly below average in terms of attractiveness for investment in the business and professional, scientific and technical cooperation and trade and repairs.

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.<sup>3</sup> 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 low class of investment attractiveness (class E), compared to the EU regions. However,

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<sup>3</sup> 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/>



compared to the previous year, the voivodship increased its position by 11 places. Opole voivodship has a competitive advantage, when it comes to human capital microclimate, ranked class B, ranked at the 50th place among all the EU regions.

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

- **in Bulgaria:** Yugoiztochen, Severen tsentralen, Yuzhen tsentralen, Severozapaden;
- **in Greece:** Kriti, Notio Aigaio, Thessalia, Ipeiros, Dytiki Ellada, Sterea Ellada, Ionia Nisia, Dytiki Makedonia, Voreio Aigaio, Peloponnisos, Anatoliki Makedonia, Thraki;
- **in Spain:** Extremadura;
- **in Portugal:** Alentejo, Região Autónoma dos Açores, Centro;
- **in Romania:** Vest, Nord-Vest, Centru, Sud-Est, Nord-Est, Sud-Vest Oltenia, Sud - Muntenia;
- **in Hungary:** Észak-Magyarország, Dél-Alföld, Észak-Alföld;
- **in Italy:** Puglia, Calabria, Basilicata

## 2. 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 Opole (distinguished with a golden star) as well as (distinguished with orange stars:) land counties Brzeg and Krapkowice.

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

- **distinguished with a golden star:** Kędzierzyn-Koźle (u) Opole (u),
- **distinguished with an orange star:** Brzeg (u).

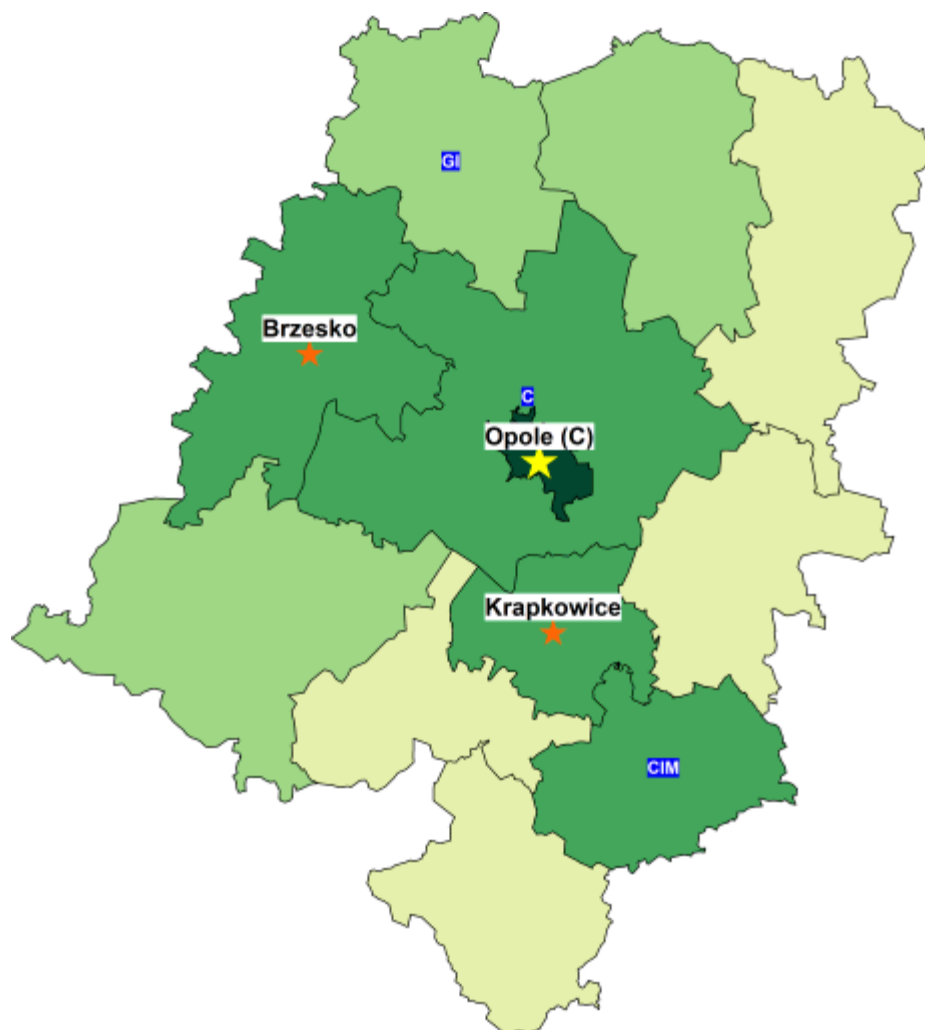
**When it comes to rural communes**, the highest ranked of them were:

- **distinguished with an orange star:** Bierawa (r), Chrzastowice (r), Dobrzeń Wielki (r), Jemielnica (r), Lubsza (r), Łubniany (r), Popielów (r), Skarbimierz (r), Tułowice (r), Turawa (r).

**When it comes to urban-rural communes**, the highest ranked of them were

- **distinguished with an orange star:** Gogolin (u-r), Krapkowice (u-r), Leśnica (u-r), Namysłów (u-r), Niemodlin (u-r), Olesno (u-r), Ozimek (u-r), Strzelce Opolskie (u-r), Ujazd (u-r), Zawadzkie (u-r), Zdzeszowice (u-r).

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



**POTENTIAL INVESTMENT ATTRACTIVENESS**  
of counties (poviats) for national economy in 2012

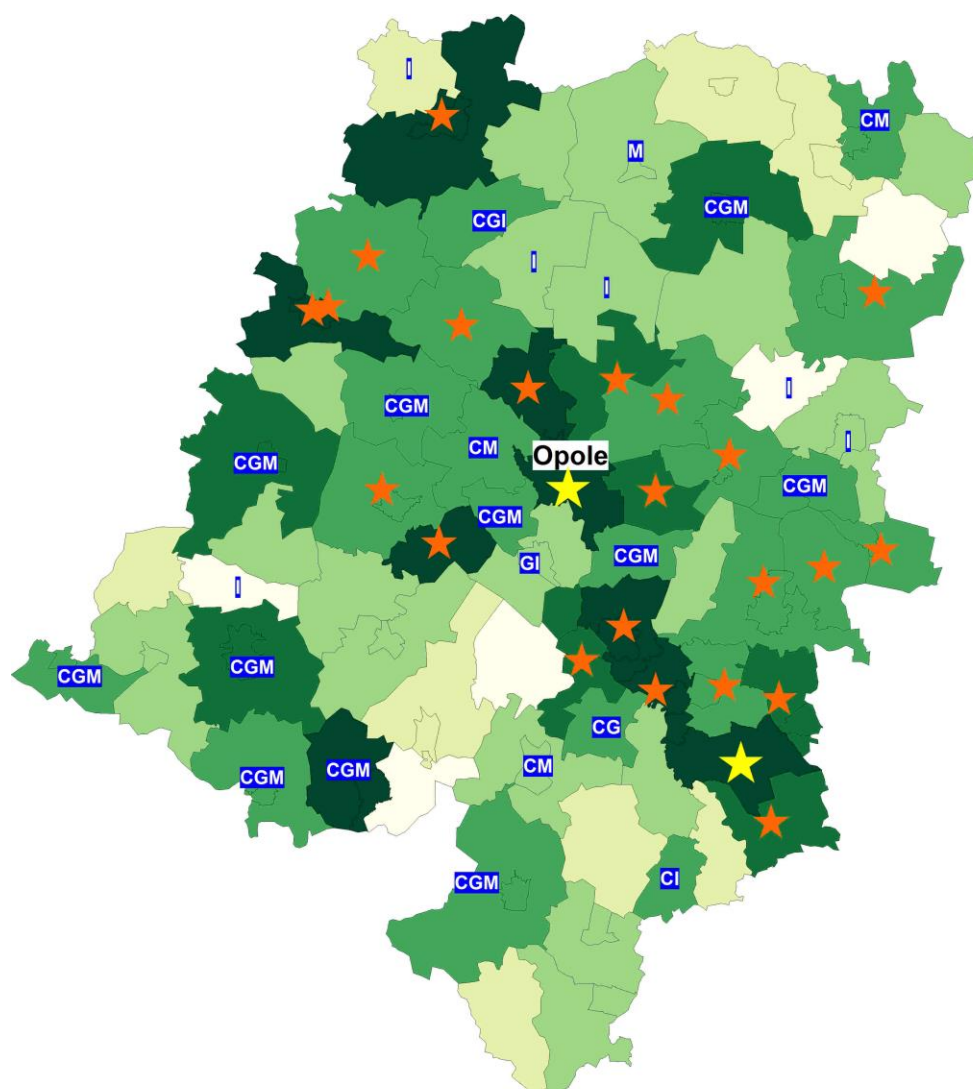
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| <ul style="list-style-type: none"> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #003366; border: 1px solid black; margin-right: 5px;"></span> A</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #006699; border: 1px solid black; margin-right: 5px;"></span> B</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #0099cc; border: 1px solid black; margin-right: 5px;"></span> C</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #99ccff; border: 1px solid black; margin-right: 5px;"></span> D</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #ccffcc; border: 1px solid black; margin-right: 5px;"></span> E</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #ffffcc; border: 1px solid black; margin-right: 5px;"></span> F</li> </ul> | <p><span style="color: yellow; font-size: 1.5em;">★</span> The highest rank for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M</p> <p><span style="color: orange; font-size: 1.5em;">★</span> Ranks above the average for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M</p> | <p>Ranks above the average for C, G, I, M sections according to PKD (Polish Classification of Economic Activity)</p> <div style="border-left: 2px solid blue; padding-left: 5px; margin-top: 10px;"> <p style="margin: 0;">C Industry</p> <p style="margin: 0;">G Trade</p> <p style="margin: 0;">I Hotels and restaurants</p> <p style="margin: 0;">M Professional, scientific, technical activities</p> </div> |
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**Golden star county:**

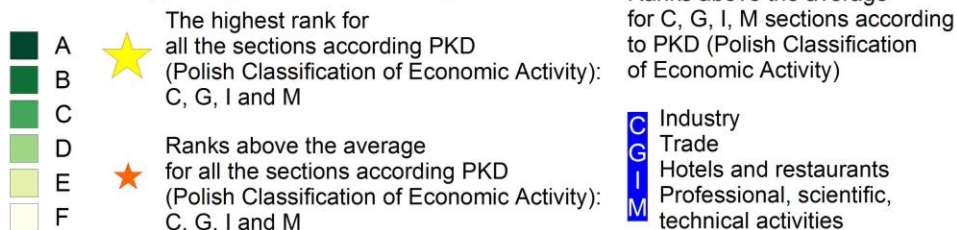
Opole

Source: Authors' own work.

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



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



**Golden star communes:**

Kędzierzyn-Koźle (u), Opole (u)

Source: Authors' own work

## 1. 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 Opole voivodship such centre is:

**the Investor Services Centre** operating within

Opolskie Centre for Economy Development (Opolskie Centrum Rozwoju Gospodarki)

[www.ocrg.Opolskie.pl](http://www.ocrg.Opolskie.pl)



**Opole 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:

**‘Śląsk’ Chamber of Commerce (*Izba Gospodarcza „Śląsk”*) ([www.igsilesia.pl](http://www.igsilesia.pl))**

The chamber has over 200 members from Silesia and other regions of the country. The chamber is the coordinator of the Silesian Timber Cluster. The chamber’s offer includes i.a.: trainings improving professional skills, support at seeking for financial aid funds for entrepreneurship development, contacts in Poland and abroad (mainly in Germany), access to new markets, organization of exhibitions, trade fairs, economic mission and cooperation exchanges in Poland and abroad, support and consulting for persons setting up and developing business.

**Opole Chamber of Commerce (*Opolska Izba Gospodarcza*) ([www.oig.opole.pl](http://www.oig.opole.pl))**

The chamber is an organization of economic self-government, representing economic interests of its 370 members. The chamber’s offer includes i.a. trainings and legalization of documents. There are an arbitration court and a Club of Young Entrepreneurs at the chamber.

**Opolskie Centre for Economic Development (*Opolskie Centrum Rozwoju Gospodarki*) ([www.ocrg.Opolee.pl](http://www.ocrg.Opolee.pl))**

The centre realizes tasks connected with creating economic development conditions, creating labour market, supporting economic activity and supporting competitiveness and innovativeness of voivodship’s economy. The centre initiates activities that should increase region’s investment attractiveness and seeking for domestic and foreign investors as well as providing services for them. An Investor Services Centre is operating within Opole Centre for Economic Development. The centre is the Managing Institution for implementation of Regional Innovation Strategy for Opole voivodship. It also builds regional networks of economic information for business and promotes ideas of clusters.

**Opole Centre of Innovations Transfer (*Opolskie Centrum Transferu Innowacji*) (<http://icimb.pl/opole/octi>)**

The centre creates a cooperation network between units providing organizations with knowledge and resources in aim to make new solutions into companies’ gains. The centre initiates cooperation between regional self-government units, job centres, entrepreneurs and scientific units on economy innovativeness growth, implements EU-financed projects aimed at knowledge and innovation transfer, monitoring entrepreneurs’ needs on technology development, seeking for right technology solutions, seeking for partners, informing on possible sources of financing innovations, increasing R&D personnel’s commitment to innovative activities for the needs of region’s industry.

**Science and Technology Park in Opole (*Park Naukowo- Technologiczny w Opolu*)**  
([www.pnt.opole.pl](http://www.pnt.opole.pl))

The park fosters seeking and implementing new technology solutions at the merge of science and business. In the future it will consist of 5 buildings: business incubator, laboratory, R&D building, high-tech building and integration area. The park's aim is to work for the benefit of Opole region by creating beneficial conditions for entrepreneurship development, especially for high-tech and knowledge-based economy. It also aims to create effective connections between science and business, stimulation innovative entrepreneurship by creating cooperation between science, business and territorial self-government.

**Opole Park of Science and Technology (*Opole Park Naukowo-Technologiczny*)**  
([www.opnt.pl](http://www.opnt.pl))

The park is a company owned by Opole Technical University. Its offer is based on cooperation on knowledge transfer between the university, business environment institutions and enterprises and identification and creating various kinds of innovative services in companies' R&D. The park offers training and coaching for entrepreneurs, organizes seminars and workshops (on project management, renewable energy resources, business plans and financial engineering).

**Kędzierzyn-Koźle Industrial Park (*Kędzierzyńsko – Kozielski Park Przemysłowy*)**  
([www.kkpp.pl](http://www.kkpp.pl))

The aim of park's activity is increasing of social-economic potential, competitiveness and attractiveness of Kędzierzyn-Koźle region and stimulating regional and local development. The park offers investors (in cooperation with Kędzierzyn-Koźle commune) support in investment process by preparing investment offers (investment plots, production halls, storage area, office space), preparing business visits and meetings arrangement, support at administrative processes, consulting on public aid issues. The offer for investors includes 3 locations of investment areas (Pole Południowe, within Katowice SEZ, Koźle river harbour and Podzamcze with a building that needs revitalization).

**Business Centre Club – Opole Chamber ([www.bcc.org.pl](http://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.



**Opole Technical University Centre of Polish-Chinese Cooperation Confucius Institute in Opole (*Politechnika Opolska Centrum Współpracy Polska-Chiny Instytut Konfucjusza w Opolu*) ([www.instytutkonfucjusza.po.opole.pl](http://www.instytutkonfucjusza.po.opole.pl))**

Confucius Institute is a public benefit organization that aims at creating academic, economic and cultural relations between Poland and China. The centre offers Chinese language courses on different levels, preparing teachers to teach Chinese at schools, providing with Chinese language teaching materials, organizing language examinations, starting cooperation with Chinese R&D units and companies, consulting on education, culture and business, organizing cultural and education events.

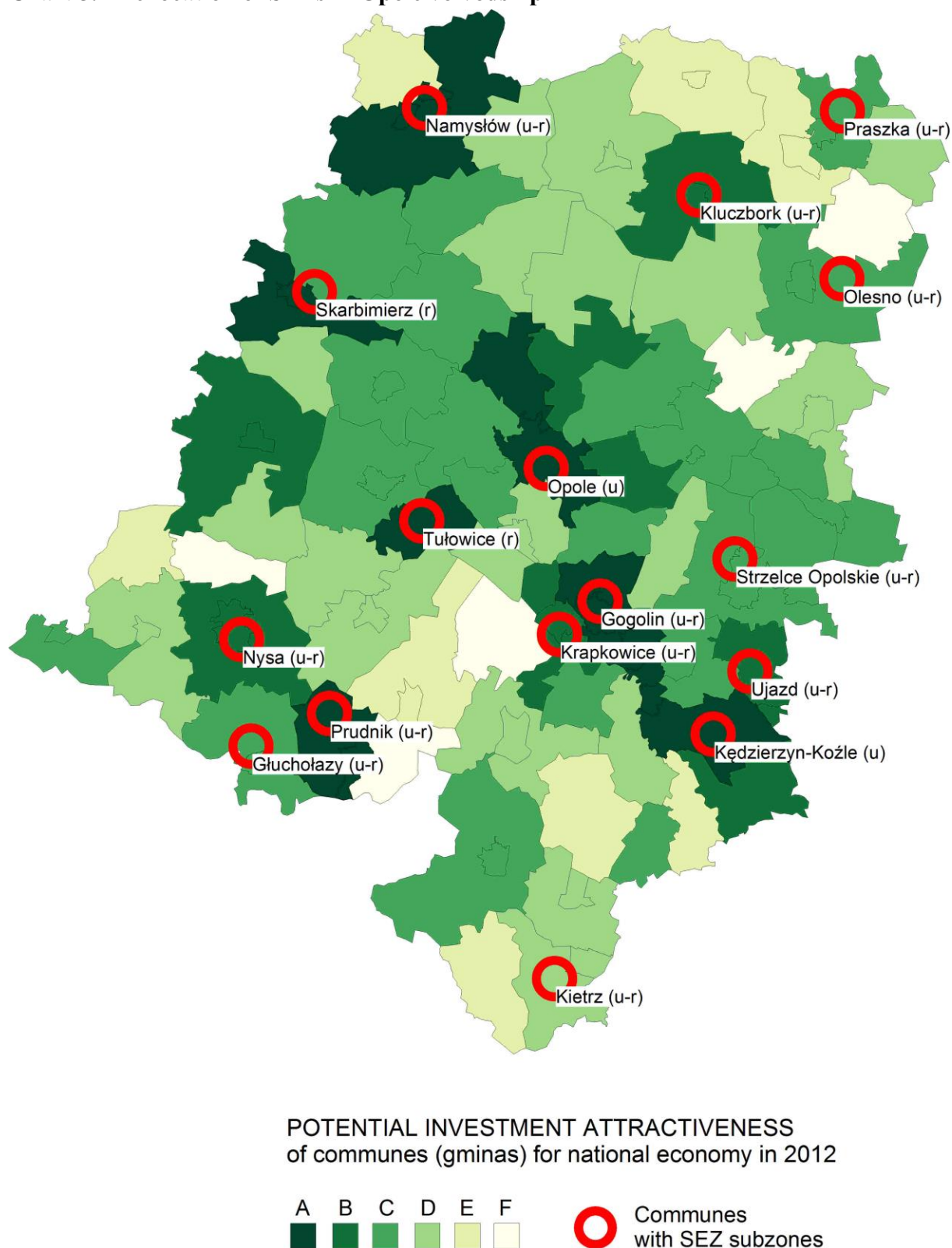
#### **4.2. SPECIAL ECONOMIC ZONES IN THE VOIVODSHIP – EFFECTS**

There are 3 special economic zones (SEZs) in Opole voivodship: Katowice SEZ, Wałbrzych SEZ and Starachowice zones. At the end of 2013 the areas of the SEZs were parts of 2 cities and 14 communes – see Chart 5.

The first SEZ areas were brought into life in 1996 in Strzelce Opolskie. The investment outlays made by SEZ companies operating in the communes of Opole region by the end of 2012 amounted to PLN 3.7 billion, which made 4% of all investment outlays made in the Polish SEZs. In the same time the SEZ companies in the region created 3.2 thousand new jobs which made 2% of all jobs created in the Polish SEZs (see Table 4 in the Appendix).

The largest investments in the voivodship have been completed in Skarbimierz, where Cadbury Polska Sp. z o. o. (the Netherlands, producer of chewing gums), Cadbury Sp. z o. o. (the Netherlands, producer of chocolate products), Keiper Polska Sp. z o.o. (Germany, car seats elements and constructions), FPS Polska Sp. z o.o. (Germany, metal packaging). Other big investments were made by firma EUROGLAS Polska Sp. z o.o. (Germany, flat glass production) in Ujazd.



**Chart 5. The location of SEZs in Opole voivodship**

Source: Authors' own work.

The SSE development plans assume that the voivodship should attract the following investments:

- from advanced technology industries and data processing services – in Katowice SEZ,
- from food-processing, chemical, energy, mineral resources, machinery, metal and furniture industries – in Starachowice SEZ,
- related to logistics and traditional voivodship's industries – furniture and wood branches – in Wałbrzych 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.

None of Opole voivodship's communes was awarded the 'A' Commune title. The closest were Opole and Kędzierzyn-Koźle, whose Internet websites and are quite good. Both communes' answers to Polish investor's e-mails were also quite good.

## 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
<b>Voivodships</b>						
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						
city of Opole	0.333	A	A	A	A	A
Krapkowice	0.261	C	B	B	B	C
Kędzierzyn-Koźle	0.255	C	C	D	C	C
Brzeg	0.250	C	C	C	C	C
Opole	0.241	C	C	D	D	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	PAII_GN	PAII_GN	PAII_C	PAII_G	PAII_I	PAII_M
	National economy	National economy	Industry	Trade	Hotels and restaurants	Professional, scientific and technical activity
<b>Urban communes</b>						
Brzeg (u)	0.279	A	A	A	B	A
Opole (u)	0.256	A	A	A	A	A
Kędzierzyn-Koźle (u)	0.253	A	A	A	A	A
<b>Rural communes</b>						
Skarbimierz (r)	0.229	A	A	A	C	B
Tułowice (r)	0.226	A	A	A	B	B
Dobrzeń Wielki (r)	0.224	A	A	A	B	A
Chrzastowice (r)	0.216	B	B	A	A	B
Bierawa (r)	0.210	B	B	B	B	B
Łubniany (r)	0.203	B	B	B	C	C
Lubsza (r)	0.200	C	B	B	C	C
Popielów (r)	0.199	C	B	C	A	C
Komprachcice (r)	0.198	C	C	C	E	B
Tarnów Opole (r)	0.197	C	C	B	D	B
Jemielnica (r)	0.195	C	C	C	A	C
Świerczów (r)	0.193	C	C	B	B	D
Turawa (r)	0.189	C	C	C	C	C
Walce (r)	0.185	C	C	C	D	D
Polska Cerekiew (r)	0.184	C	C	D	B	D
Dąbrowa (r)	0.182	C	C	D	D	C
<b>Urban-rural communes</b>						
Zdzieszowice (u-r)	0.243	A	A	A	C	A
Prudnik (u-r)	0.232	A	A	B	D	A
Namysłów (u-r)	0.223	A	A	A	B	A
Gogolin (u-r)	0.220	A	A	A	A	B
Nysa (u-r)	0.216	B	B	B	D	A
Krapkowice (u-r)	0.215	B	B	B	B	B
Kluczbork (u-r)	0.212	B	B	B	D	B
Ujazd (u-r)	0.208	B	B	B	C	C
Grodków (u-r)	0.201	B	B	B	D	C
Ozimek (u-r)	0.198	C	C	C	C	C
Zawadzkie (u-r)	0.198	C	B	B	C	C
Kolonowskie (u-r)	0.192	C	C	C	D	C

## Regional investment attractiveness 2014

Lewin Brzeg (u-r)	0.191	C	C	C	E	C
Olesno (u-r)	0.190	C	C	C	B	B
Niemodlin (u-r)	0.190	C	C	C	C	C
Leśnica (u-r)	0.189	C	C	C	C	C
Głubczyce (u-r)	0.188	C	C	C	D	C
Paczków (u-r)	0.188	C	C	C	E	C
Głuchołazy (u-r)	0.188	C	C	C	D	C
Praszka (u-r)	0.187	C	C	D	D	C
Strzelce Opolskie (u-r)	0.186	C	C	B	B	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)
<b>Wałbrzych</b>	Brzeg (r) Skarbimierz	1 326.95	1 123	food products
<b>Katowice</b>	Głubczyce (u-r) Kietrz	0.00		no leading industry
<b>Katowice</b>	Kędzierzyn-Koźle (u) Kędzierzyn-Koźle	0.00		no leading industry
<b>Wałbrzych</b>	Kluczbork (u-r) Kluczbork	10.55	11	fabricated metal products (except machinery and equipment)
<b>Katowice</b>	Krapkowice (u-r) Gogolin	0.00		no leading industry
<b>Katowice</b>	Krapkowice (u-r) Krapkowice	241.24	65	paper and paper products
<b>Wałbrzych</b>	Namysłów (u-r) Namysłów	0.00		no leading industry
<b>Katowice</b>	Nysa (u-r) Głuchołazy	79.09	47	paper and paper products
<b>Wałbrzych</b>	Nysa (u-r) Nysa	45.34	188	wood, wood and cork products, except furniture; articles of straw and plaiting materials, rubber and plastic products, rubber and plastic products
<b>Katowice</b>	Olesno (u-r) Olesno	0.00		no leading industry
<b>Wałbrzych</b>	Olesno (u-r) Praszka	485.54	380	machinery and equipment n.e.c.
<b>Starachowice</b>	Opole (r) Tułowice	74.75	469	rubber and plastic products, fabricated metal products (except machinery

				and equipment)
<b>Wałbrzych</b>	Prudnik (u-r) Prudnik	10.70	5	machinery and equipment n.e.c.
<b>Katowice</b>	Strzelce Opolskie (u-r) Strzelce Opolskie	449.49	302	wood, wood and cork products, except furniture; articles of straw and plaiting materials, rubber and plastic products
<b>Łódź</b>	Strzelce Opolskie (u-r) Ujazd	850.67	310	other non-metallic mineral products
<b>Wałbrzych</b>	city of Opole (u) Opole	115.74	343	food products, metals, fabricated metal products (except machinery and equipment)

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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