

Warsaw School of Economics



REGIONAL INVESTMENT ATTRACTIVENESS 2015

Mazovian Voivodship

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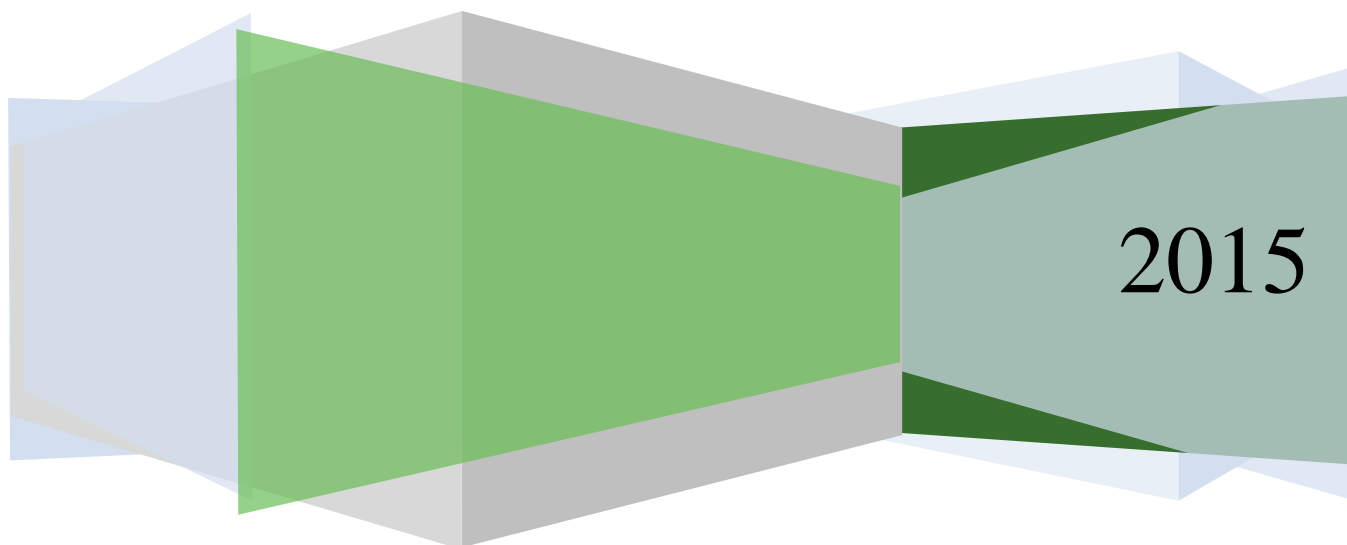
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PAIiZ provides free of charge professional advisory services for investors, including:

- investment site selection;
- tailor-made investors visits to Poland;
- information on legal and economic environment;
- data on available investment incentives;
- facilitating contacts with central and local authorities;
- identification of potential suppliers and contractors;
- care of the investors operating in the country, including the reinvestment.

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 prof. H. Godlewska-Majkowska, Ph.D., full professor in 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: *powiat*) and communes (Polish: *gmina*). The results of the investment attractiveness calculations for the Mazovian 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 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 repairs, I – accommodation 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 voivodships, 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 MAZOVIAN (MAZOWIECKIE) VOIVODSHIP

Mazovian voivodship is situated in central-eastern Poland in the Mazovian Lowlands. It is the largest and most populous region of Poland. It is the most economically developed and the most attractive voivodship for investments and distances all other regions of Poland in terms of GDP per capita. A characteristic feature of the region is big service sector, which means that in accordance with a high level of economic development modern services like financial intermediation, business services, telecommunications and education play an important role. Moreover, almost all branches of industry have developed in Mazovia, particularly manufacture of means of transportation and petrochemical industry. The main administrative centre is Warsaw, the capital city of Poland, which (together with its suburban area) is one of the most attractive investment areas in the whole country.

The advantages of the voivodship are:

- its central location at the intersection of traffic routes and in the trans-European transport corridors providing connection to the larger cities of Poland and Europe,
- Poland's largest international airport, i.e. Warsaw Chopin Airport, which handles almost 50% of the whole passenger traffic in Poland and maintains ca. 100 regular plane connections with domestic and foreign airports,
- presence of numerous higher education institutions and research establishments,
- the highest GDP per capita rate in the country,
- substantial human resources, including both low-qualified workers with low wage expectations and specialists trained in various fields,
- very high labour productivity compensating a relatively high level of wages and salaries,
- presence of the Warsaw Stock Exchange, the capital centre of Central and Eastern Europe,
- investment incentives for investors offered in special economic zones.

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

Table 1. General characteristics of the economy of Mazovian voivodship

Feature	Mazovian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2013 (PLN/person)	68558	43175	-
Population (persons) on 31 December 2014	5.334.511	38.478.602	13,9%
Human Resources Potential			
Higher education institutions graduates (persons) in 2014	77090	424317	18,2%
Secondary schools graduates (persons) in 2014	38183	271333	14,1%
Number of employed persons in 2014 (in thousands)	2621	15859	16,5%
Structure of employed persons in 2013	agriculture 11.1% industry 21.9% services 67%		11,5% 30,5% 58,0%
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2013	34491,1	75105,1	45,9%
Capital of companies (PLN n) in 2013	102572,7	209130,1	49,0%
Special Economic Zones (SEZs) in the voivodship*			
<ul style="list-style-type: none"> - Łódź - Starachowice - Suwalki - Tarnobrzeg - Warmian-Mazurian 			
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 repairs class A Accommodation and catering class A Education class A		
Real investment attractiveness RAI	National economy class A Industry class A Trade and repairs class A Accommodation and catering class A Professional, scientific and economic activities class A		

Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAII_GN)		
Counties	Class A	City of Warszawa, city of Ostrołęka, city of Płock, city of Radom, city of Siedlce, Piaseczno, Pruszków, Warszawa West
	Class B	Grodzisk Mazowiecki, Legionoro
Communes	Class A	Białobrzegi (u-r), Błonie (u-r), Brwinów (u-r), Ciechanów (u), Czosnów (r), Garwolin (u), Grodzisk Mazowiecki (u-r), Halinów (u-r), Izabelin (r), Jaktorów (r), Józefów (u), Kobyłka (u), Konstancin-Jeziorna (u-r), Legionowo (u), Lesznowola (r), Łomianki (u-r), M.st.Warszawa (u), Maków Mazowiecki (u), Marki (u), Michałowice (r), Milanówek (u), Mińsk Mazowiecki (u), Mława (u), Nadarzyn (r), Nieporęt (r), Nowy Dwór Mazowiecki (u), Ostrołęka (u), Ostrów Mazowiecka (u), Otwock (u), Ożarów Mazowiecki (u-r), Piaseczno (u-r), Piastów (u), Pionki (u), Płock (u), Płońsk (u), Podkowa Leśna (u), Pruszków (u), Radom (u), Radzymin (u-r), Raszyn (r), Serock (u-r), Siedlce (u), Sierpc (u), Słupno (r), Sochaczew (u), Sokołów Podlaski (u), Stare Babice (r), Sulejówek (u), Tarczyn (u-r), Wołomin (u-r), Wyszaków (u-r), Ząbki (u), Zielonka (u), Żabia Wola (r), Żyrardów (u)
	Class B	Góra Kalwaria (u-r), Grójec (u-r), Jabłonna (r), Kołbiel (r), Kozienice (u-r), Łosice (u-r), Mszczonów (u-r), Pomiechówek (r), Przasnysz (u), Radziejowice (r), Różan (u-r), Rzekuń (r), Siedlce (r), Węgrów (u), Wieliszew (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 4. in the Appendix.

Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts 5334511 (as of 2014), which is 13.9% of the population of Poland. The age structure in the voivodship in 2014 was as follows: 18.5% of the population at pre-productive age, 62% at productive age and 19.0% at post-productive age (for Poland it was 18%, 63% and 19% respectively).

The main potential for human capital creation in the voivodship lies in 107 higher education institutions in which there are 283000 students studying, which makes up 19.3% of all students in Poland.

According to a report prepared by the Committee for Evaluation of Research (KEJNA) for the Ministry of Science and Higher Education in Mazovian voivodship 8 faculties of universities received the highest scientific category A +, they are: Faculty of Conservation and Restoration of Works of Art Academy of Fine Arts in Warsaw, Collegium of Economic Analysis and the College management and Finance School of Economics in Warsaw as well as Faculty of History, Faculty of Psychology, Faculty of Chemistry, Center for New Technology University, Faculty of Physics and Faculty of Mathematics, Computer Science and Mechanics at Warsaw University; 46 faculties received the category - A; 85 faculties received a category - B; and 16 faculties category - C. It is also worth mentioning that 64 schools of higher education had not received any category awarded by KEJNA. Detailed information can be found in Appendix (Table 5).

In addition, 7.6% of the secondary school students in the voivodship attend vocational schools and 26.4% attend technical schools.

The registered unemployment rate in the voivodship amounted to 8.6% in August 2015, compared to 9.7%² in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2015 amounted to PLN 4707.5, which is 125% of the average for Poland.

In 2013 Mazovian voivodship made a contribution of 22 % to the GDP of Poland. Calculated per capita, it amounted to PLN 68558 with the average for Poland PLN 43175. With this result the voivodship takes the first place in the country. The GDP growth rate in the voivodship in the years 2003-2013² amounted to 207% while the average for Poland amounted to 197%.

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 67% whereas a share of the agricultural and industrial sectors are respectively 11.1% and 21.9% (Central Statistical Office, Local Data Bank 2015).

In the structure of voivodship's industry important role is played by: electricity, gas, steam and air conditioning supply (19 % of sold production of the whole voivodship's industry at the end of 2014), manufacture of food products (18%) and manufacture of chemicals and chemical products (6%).³

As the biggest Polish region the voivodship takes leading positions when it comes to competitive position in the most industries. The voivodship has big shares in county's sold production of the following industries:

- manufacture of chemicals and chemical products (28% of the country's sold production in 2014)
- printing and reproduction of recorded media (29%)
- manufacture of beverages (30%),
- manufacture of basic pharmaceutical products and pharmaceutical preparation (23%),
- manufacture of food products (23%)
- manufacture of computers, electronic and optical products (24%)
- manufacture of electric appliances (21%)

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: agriculture, industry, services, tourism (especially foreign), chemical industry, construction, logistics, food industry, growth of innovativeness and competitiveness of the region, tele-informatization, improvement of communication and

² The unemployed and the unemployment rate according to voivodship, sub-regions and counties (as of the end of August 2012). Central Statistical Office.

³ Calculations based on Statistical Bulletin for the voivodship, first quarter 2015 and first quarter of Statistical Bulletin 2015 www.stat.gov.pl (10/11/2015).

transport on the region (especially civil aviation) and multifunctional development of rural areas.

For the entrepreneurs willing to invest in Mazovian 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 Mazovian voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include food, construction and BPO sectors.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Łódź SEZ, Starachowice SEZ, Suwałki SEZ, Tarnobrzeg SEZ, Warmian-Mazurian SEZ, in the following subzones:**

- **Łódź SEZ in subzones:** Grodzisk Mazowiecki (u-r), Warszawa (u), Płock (u), Pruszków (u), Raciąż (u), Sochaczew (u), Żyrardów (u),
- **Starachowice SEZ in subzones:** Iłża (u-r), Szydłowiec (u-r),
- **Suwałki SEZ in subzones:** Małkinia Górna (r),
- **Tarnobrzeg SEZ in subzones:** Mińsk Mazowiecki (r), Nowe Miasto nad Pilicą (u-r), Ożarów Mazowiecki (u-r), Pilawa (u-r), Pionki (u), Przasnysz (r), Radom (u), Siedlce (u), Siedlce (r), Węgrów (u), Wyszaków (u-r), Pionki (r),
- **Warmian-Mazurian SEZ in subzones:** Ciechanów (u), Ciechanów (r), Mława (u), Ostrołęka (u), Płońsk (u), Zakroczym (u-r)

In the all above-mentioned locations investors can benefit from tax allowances in most voivodship's subregions amounting to 35% - 55% (except from Warsaw, where it amounts from 15% to 35% till 31 December 2017 and from 10% to 30% since 1 January 2018; and except from Ciechanów subregion, where it amounts from 20% to 40%), 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

Mazovian voivodship is one of the most attractive voivodships in Poland and 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 national economy, industry, trade and repair. It also takes a very high position, when it comes to foreign capital inflows to Poland.

In 2013 the region took the 1st place in Poland in terms of accumulated share capital in the companies with foreign capital participation (an 49% share of its total value in all voivodships).

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 three years. They are based on measurements of attractiveness of human resources, market and innovativeness.⁴

Based on the above-mentioned indices it can be stated that the voivodship is characterized by a high class of investment attractiveness (class B) as the only Polish region, compared to the EU regions, taking 55th place of 270 regions, for whom the indices were calculated. Compared to the previous year, the voivodship increased its position by 2 places. When it comes to the new EU-members' regions, Mazovian voivodship takes the 5th place (after capital regions: Prague, Bratislava, Budapest, Bucharest).

Mazovian voivodship has competitive advantages when it comes to all of the analysed microclimates. Its biggest advantage is human capital (class A), ranked at the 14th place of all European regions. What is more innovation microclimate was ranked class B, and market microclimate was ranked class C. 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.

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

- **in Austria:** Burgenland, Kärnten, Niederösterreich, Oberösterreich, Salzburg, Steiermark, Tirol, Vorarlberg;
- **in Belgium:** Prov. Hainaut, Prov. Liège, Prov. Limburg, Prov. Luxembourg, Prov. Namur, Prov. Oost-Vlaanderen, Prov. West-Vlaanderen;
- **in Great Britain:** Cornwall and Isles of Scilly, Cumbria, Derbyshire and Nottinghamshire, Devon, Dorset and Somerset, East Wales, East Yorkshire and Northern Lincolnshire, Essex, Greater Manchester, Herefordshire, Worcestershire and Warwickshire, Highlands and Islands, Kent, Lancashire, Leicestershire, Rutland and Northamptonshire, Lincolnshire, Merseyside, North Yorkshire, Northern Ireland, Northumberland and Tyne and Wear, Shropshire and Staffordshire, South Western Scotland, South Yorkshire, Tees Valley and Durham, West Midlands, West Wales and The Valleys, West Yorkshire;
- **in Bulgaria:** Severen tsentralen, Severoiztochen, Severozapaden, Yugoiztochen, Yuzhen tsentralen;

⁴ 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 Cyprus:** Kypros;
- **in Czech Republic:** Jihovýchod, Jihozápad, Moravskoslezsko, Severovýchod, Severozápad, Střední Čechy, Střední Morava;
- **in Denmark:** Midtjylland, Nordjylland, Sjælland, Syddanmark;
- **in Estonia:** Eesti;
- **in Finland:** Åland, Etelä-Suomi, Pohjois-Suomi;
- **in France :** Alsace, Aquitaine, Auvergne, Basse-Normandie, Bourgogne, Bretagne, Centre, Champagne-Ardenne, Corse, Franche-Comté, Guadeloupe, Guyane, Haute-Normandie, Languedoc-Roussillon, Limousin, Lorraine, Martinique, Nord - Pas-de-Calais, Pays de la Loire, Picardie, Poitou-Charentes, Provence-Alpes-Côte d'Azur, Réunion;
- **in Greece:** Anatoliki Makedonia, Thraki, Attiki, Dytiki Ellada, Dytiki Makedonia, Ionia Nisia, Ipeiros, Kentriki Makedonia, Kriti, Notio Aigaio, Peloponnisos, Sterea Ellada, Thessalia, Voreio Aigaio;
- **in Spain:** Andalucía, Aragón, Canarias, Cantabria, Castilla y León, Castilla-La Mancha, Cataluña, Ciudad Autónoma de Ceuta, Ciudad Autónoma de Melilla, Comunidad Foral de Navarra, Comunidad Valenciana, Extremadura, Galicia, Illes Balears, La Rioja, Principado de Asturias, Región de Murcia;
- **in The Netherlands:** Drenthe, Friesland, Gelderland, Limburg, Overijssel, Zeeland;
- **in Ireland:** Border, Midland and Western;
- **in Lithuania:** Lietuva;
- **in Latvia:** Latvija;
- **in Malta:** Malta;
- **in Germany:** Arnsberg, Brandenburg, Chemnitz, Detmold, Dresden, Düsseldorf, Freiburg, Gießen, Hannover, Kassel, Koblenz, Leipzig, Lüneburg, Mecklenburg-Vorpommern, Münster, Niederbayern, Oberfranken, Oberpfalz, Rheinhessen-Pfalz, Saarland, Sachsen-Anhalt, Schleswig-Holstein, Schwaben, Thüringen, Trier, Unterfranken, Weser-Ems;
- **in Portugal:** Alentejo, Algarve, Centro, Norte, Região Autónoma da Madeira, Região Autónoma dos Açores;
- **in Romania:** Centru, Nord-Est, Nord-Vest, Sud - Muntenia, Sud-Est, Sud-Vest Oltenia, Vest, slowackie: Stredné Slovensko, Východné Slovensko, Západné Slovensko;
- **in Slovenia:** Vzhodna Slovenija;
- **in Sweden:** Mellersta Norrland, Norra Mellansverige, Övre Norrland, Småland med Öarna;
- **in Hungary:** Dél-Alföld, Dél-Dunántúl, Észak-Alföld, Észak-Magyarország, Közép-Dunántúl, Nyugat-Dunántúl;
- **in Italy:** Abruzzo, Basilicata, Calabria, Campania, Emilia-Romagna, Friuli-Venezia Giulia, Liguria, Lombardia, Marche, Molise, Piemonte, Provincia Autonoma Bolzano/Bozen, Provincia Autonoma Trento, Puglia, Sardegna, Sicilia, Toscana, Umbria, Valle d'Aosta/Vallée d'Aoste, Veneto.

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.

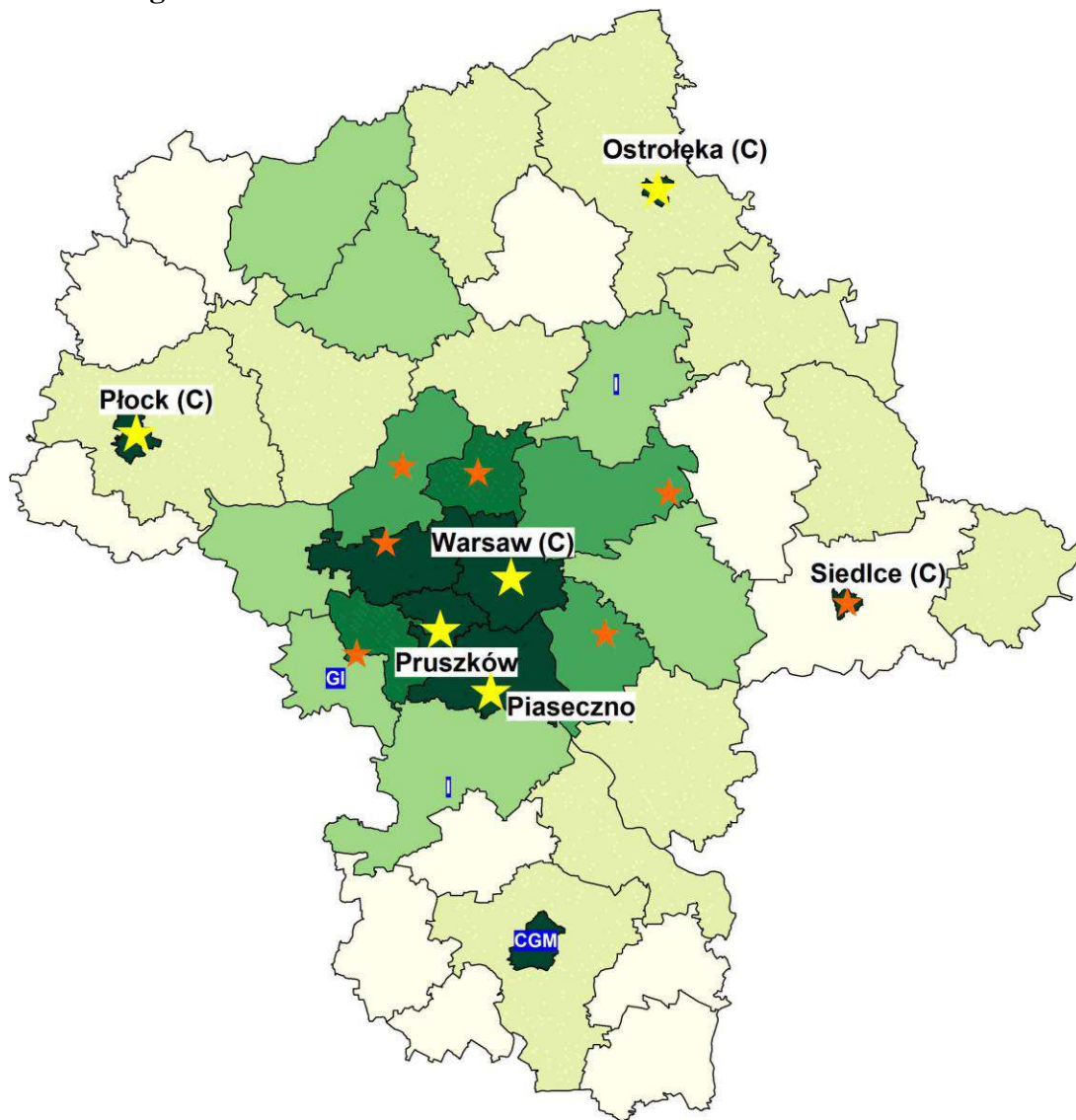
Market conditions informs on market absorptive power that means the number of potential customers and indirectly on their wealth that means ability to buy goods and services.

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 1 and Chart 2). 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.

Chart 1. Potential investment attractiveness of counties of Mazovian voivodship, considering the most attractive sections



POTENTIAL INVESTMENT ATTRACTIVENESS
of counties (poviats) for national economy in 2014

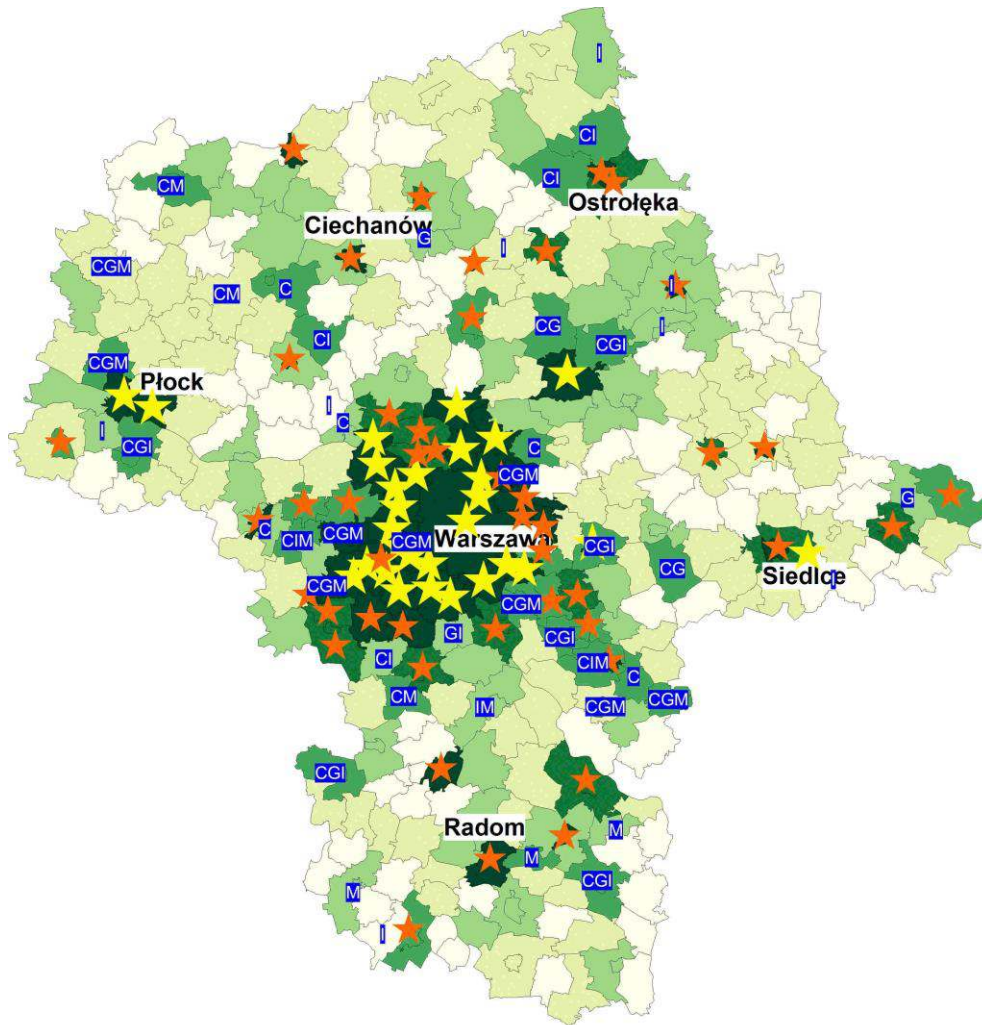
- | | | |
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| <ul style="list-style-type: none"> A B C D E F | <ul style="list-style-type: none"> The highest rank for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M Ranks above the average for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M | <p>Ranks above the average for C, G, I, M sections according to PKD (Polish Classification of Economic Activity)</p> <ul style="list-style-type: none"> C Industry G Trade and repairs I Accommodation and catering M Professional, scientific, technical activities |
|--|---|--|

Golden star counties:

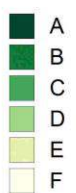
Warszawa, Ostrołęka, Płock, Siedlce, Piaseczno, Pruszków

Source: Authors' own work.

Chart 2. Potential investment attractiveness of communes of Mazovian voivodship, considering the most attractive sections



POTENTIAL INVESTMENT ATTRACTIVENESS
of communes (gminas) for national economy in 2014



- 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)

- Industry
- Trade and repairs
- Accommodation and catering
- Professional, scientific, technical activities

Golden star communes:

Józefów (u), Warszawa (u), Marki (u), Milanówek (u), Mińsk Mazowiecki (u), Nowy Dwór Mazowiecki (u), Otwock (u), Płock (u), Podkowa Leśna (u), Pruszków (u), Siedlce (u), Ząbki (u), Czosnów (r), Izabelin (r), Lesznowola (r), Michałowice (r), Nadarzyn (r), Nieporęt (r), Raszyn (r), Słupno (r), Stare Babice (r), Grodzisk Mazowiecki (u-r), Konstancin-Jeziorna (u-r), Łomianki (u-r), Ożarów Mazowiecki (u-r), Piaseczno (u-r), Radzymin (u-r), Serock (u-r), Wyszków (u-r).

Source: Authors' own work.

When it comes to counties, the highest ranked city counties were Warszawa, Ostrołęka, Płock, and when it comes to land counties, the highest ranked ones were Piaseczno, Pruszków as well as (distinguished with orange stars:) land counties Grodzisk Mazowiecki, Legionów, Nowy Dwór Mazowiecki, Otwock, Warszawa West, Wołomin and city of Siedlce.

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

- **distinguished with a golden star:** Józefów (u), Warszawa (u), Marki (u), Milanówek (u), Mińsk Mazowiecki (u), Nowy Dwór Mazowiecki (u), Otwock (u), Płock (u), Podkowa Leśna (u), Pruszków (u), Siedlce (u), Ząbki (u),
- **distinguished with an orange star:** Ciechanów (u), Garwolin (u), Kobyłka (u), Legionowo (u), Maków Mazowiecki (u), Mława (u), Ostrołęka (u), Ostrów Mazowiecka (u), Pionki (u), Płońsk (u), Przasnysz (u), Radom (u), Sochaczew (u), Sokołów Podlaski (u), Sulejówek (u), Węgrów (u), Zielonka (u), Żyrardów (u).

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

- **distinguished with a golden star:** Czosnów (r), Izabelin (r), Lesznowola (r), Michałowice (r), Nadarzyn (r), Nieporęt (r), Raszyn (r), Słupno (r), Stare Babice (r) ,
- **distinguished with an orange star:** Celestynów (r), Jabłonna (r), Kampinos (r), Kołbiel (r), Leszno (r), Pomiechówek (r), Radziejowice (r), Rzekuń (r), Sarnaki (r), Siedlce (r), Wiązowna (r), Wieliszew (r), Żabia Wola (r).

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

- **distinguished with a golden star:** Grodzisk Mazowiecki (u-r), Konstancin-Jeziorna (u-r), Łomianki (u-r), Ożarów Mazowiecki (u-r), Piaseczno (u-r), Radzymin (u-r), Serock (u-r), Wyszaków (u-r),
- **distinguished with an orange star:** Białobrzegi (u-r), Brwinów (u-r), Góra Kalwaria (u-r), Grójec (u-r), Halinów (u-r), Kozienice (u-r), Łosice (u-r), Mszczonów (u-r), Pilawa (u-r), Pułtusk (u-r), Różan (u-r), Szydłowiec (u-r), Tarczyn (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 Mazovian voivodship such centre is:

the Investor Services Centre operating within
Mazovia Development Agency (Agencja Rozwoju Mazowska S.A.)
www.coie.armsa.pl



Mazovian 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:

Polish Industrial and Trade Chamber of Construction (*Polska Izba Przemysłowo-Handlowa Budownictwa w Warszawie*) (www.piph.org)

The chamber is an organization of economic self-government operating in construction industry. It represents economic interests of its members towards country's and territorial self-government units in Poland and abroad. It also cooperates with other organizations from construction, gives opinions on legal acts concerning construction and construction products industry, promotes its members' successes on the international markets, initiates contacts with investors, producers and traders on domestic and international markets. The chamber's offer

includes training such as law training and related to the whole process of investment, construction law, land development, and environmental law as well as technical and construction regulations. As part PIPHB are conducted analysis and observation of the construction market, supported efforts to improve the quality of products for construction, as well as aiming at knowledge transfer and training for school construction.

Polish Chamber of Trade in Warsaw (*Polska Izba Handlu w Warszawie*)
(<http://www.pih.org.pl>)

Polish Chamber of Trade in Warsaw is a retail trade chamber of commerce whose members are shops, wholesale companies, FMCG environment companies and service companies. The chamber's tasks are i.a.: taking part in social dialogue and giving opinions on trade and services issues, representing companies and building their image in media and representing its members towards state institutions. The offer of the park include, among others communication about the activities of member firms, training, support image-building support legislative action, organizing events, integrate information activities on trade and services. The Chamber participates in the consultation draft laws, consultative conferences, meetings of the parliamentary committees.

Investors' Chamber of Commerce and Industry (*Izba Przemysłowo-Handlowa w Polsce*)
(<http://izbainwestorow.pl/>)

The chamber is an organization of economic self-government representing economic interests of its members who are foreign investors operating in Poland and Polish investors who cooperate with them. The chamber represents its members' opinions towards state and self-government units, gives opinions on legal acts of economic law, gathers information on strategic state investments and commune investments, organizes conferences and business meetings and business trips. The chamber issues a quarterly magazine 'Foreign Investor' containing information on economic, legal, Sejm and EU issues as well as the most important information on chamber's activities.

Płock Techno-Industrial Park (*Płocki Park Przemysłowo-Technologiczny*) (www.pppt.pl)

is an investment area of over 200 ha with a valid spatial development plan. There are 3 components of the park: industrial park, technology park, and R&D park. The park is cooperating with the Polish Information and Foreign Investment Agency in marketing and promotion to attract investors. The park's offer includes property tax exemptions, income tax exemptions (SEZ zone status can be granted to investments in the park), help at seeking for human resources (like tailor-made recruitment and trainings), support at investment preparation and realization, technical consulting, architectonic and technical design, assistance at contacts with offices and other administrative units, assistance at application for EU funds. As part of the development program PPPT investments are construction of Corporate Services Centre and the Central Laboratory together with the development areas. Płock Industrial and Technological Park also takes action to create a Technology Incubator and Innovation "Integratio", which aims to provide budding entrepreneurs from the SME sector assistance in starting and running a business offering a product or service created as a result of the implementation of the new technology. PPPT is involved in cluster initiatives

through participation in the creation of Social Innovation Cluster Mazowiecki, member of the Cluster of Aerospace Engineering and Satellite and coordinating the activities and functioning Mazowiecki Chemical Cluster.

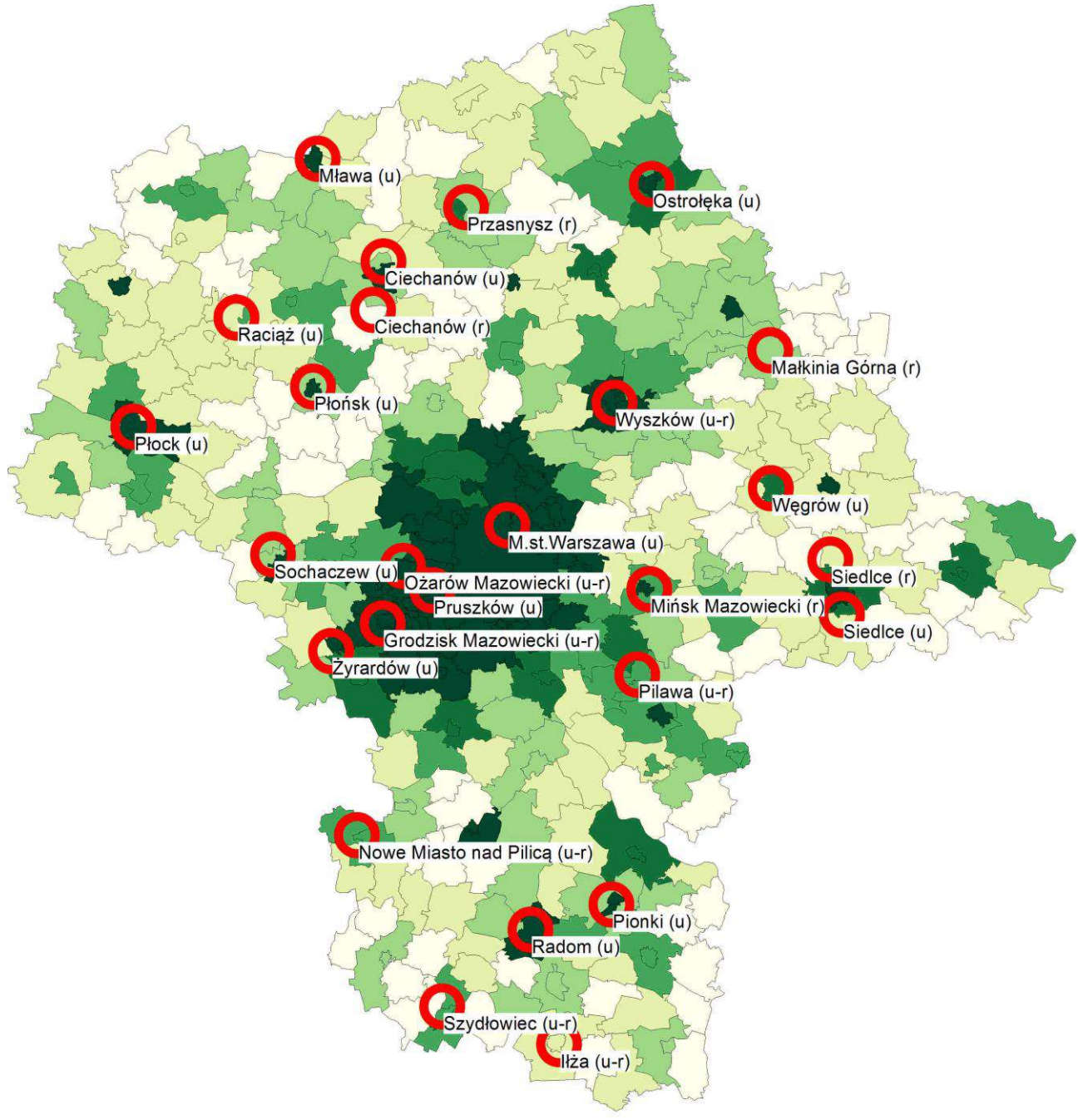
4.2. SPECIAL ECONOMIC ZONES IN THE VOIVODSHIP – EFFECTS

There are 5 special economic zones (SEZs) in Mazovian voivodship: Łódź SEZ, Starachowice SEZ, Suwałki SEZ, Warmian-Masurian SEZ and Tarnobrzeg SEZ. At the end of 2014 the areas of the SEZs were parts of 14 cities and 13 communes – see Chart 3.

The first SEZ areas were brought into life in 2001. The investment outlays made by SEZ companies operating in the communes of Mazovia by the end of 2012 amounted to PLN 3.6 billion, which made 4% of all investment outlays made in the Polish SEZs. In the same time the SEZ companies in the region created 12.7 thousand new jobs which made 4% of all jobs created in the Polish SEZs (see Table 4 in the Appendix).

The largest investments in voivodship have been completed in Radom, Warszawa and Mława. In Mława the biggest investor is Korean LG Electronics Mława sp. z o.o., a manufacturer of computers, electronic and optical products. Other important investors in the voivodship are: DAG-DRUK Piotr Falkiewicz (Poland, storage and support activities for transportation), Wipasz S.A. (Poland, food products), Polska Grupa Drobiarska sp. z o.o. (Poland, chemicals and chemical products). In Radom the following companies invested: in manufacture of metal products: ALMECH s.c. Alina i Stanisław Jasik, HART MET Sp. z o.o. ALTHA POWDER METALLURGY Sp. z o.o. TOHO POLAND Sp. z o.o., and MEDICOFARMA Sp. z o.o. – in manufacture of pharmaceuticals and pharmaceutical products, ZBYSZKO COMPANY Sp. z o.o. – producer of beverages and juices. In Warszawa the following companies invested: Procter and Gamble Operations Poland Sp. z o.o. (the Netherlands, hygiene products), ATM S.A. (Poland, BPO), and in Ostrołęka: GIPSEL Sp. z o.o. (Poland, other non-metallic mineral products), Produkcja Elementów Betonowych NATRIX Sp. z o.o. (Poland, other non-metallic mineral products), Stora Enso Poland S.A. (Sweden, paper and paper products), MELVIT S.A. (Poland, food products).

Chart 3. The location of SEZs in Mazovian voivodship



POTENTIAL INVESTMENT ATTRACTIVENESS
of communes (gminas) for national economy in 2014



Source: Authors' own work.

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

- from modern services sector including R&D services that would make use of the existing R&D facilities and create centres of advanced technologies, industrial parks as well as stimulate cooperation between businesses in Łódź SEZ,
- from food-processing, machinery, construction materials, electro-technic and automotive industries that would create jobs in post-industrial areas affected by high unemployment – in Starachowice SEZ,
- that would create a considerable number of new jobs and utilise the industrial traditions of eastern Mazovia and available workforce – in Suwałki SSE,
- from food-processing, machinery, construction materials, electro-technic, automotive, metal, precise mechanics and synthetic materials industries that would enable activation of Warsaw agglomeration surroundings – in SEZ Tarnobrzeg,
- from electronic, electro-technic, machinery, chemical industries – Warmian-Mazurian SEZ.

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 and repairs	Accommodation and catering	Professional, scientific and technical activities
Voivodships						
LOWER SILESIAN	0,818	A	A	A	B	B
KUYAVIAN-POMERANIAN	0,565	C	C	E	D	D
LUBLIN	0,173	F	E	F	F	F
LUBUSZ	0,319	E	E	D	C	E
ŁÓDŹ	0,566	C	B	E	E	D
LESSER POLAND	0,691	B	B	A	A	B
MAZOVIAN	0,985	A	A	A	A	A
OPOLE	0,267	E	E	D	E	E
SUBCARPATHIAN	0,364	D	E	D	E	E
PODLASKIE	0,244	E	E	E	D	E
POMERANIAN	0,667	B	C	A	A	B
SILESIAN	1,000	A	A	B	C	A
ŚWIĘTOKRZYSKIE	0,000	F	F	F	F	F
WARMIAN-MASURIAN	0,206	E	F	D	C	E
GREATER POLAND	0,489	D	D	C	D	C
WESTERN POMERANIAN	0,587	C	C	C	A	C

Source: Authors on the basis of the results of statutory research carried out in Collegium of Business Administration under the guidance of H. Godlewska-Majkowska in 2015

Table 2. POTENTIAL INVESTMENT ATTRACTIVENESS OF COUNTIES OF MAZOVIAN 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 and repairs	Accommodation and catering	Professional, scientific and technical activities
Counties						
Capital city of Warszawa	0,418	A	A	A	A	A
City of Ostrołęka	0,328	A	A	A	A	A
City of Płock	0,321	A	A	A	A	A
City of Siedlce	0,319	A	A	A	B	A
Piaseczno	0,302	A	A	A	A	A
Pruszków	0,300	A	A	A	A	A
Warsaw West	0,281	A	A	B	A	A
City of Radom	0,280	A	B	B	D	A
Grodzisk Mazowiecki	0,269	B	B	B	A	B
Legionowo	0,266	B	B	B	A	B
Otwock	0,242	C	C	C	B	C
Wołomin	0,240	C	C	C	C	C
Nowy Dwór Mazowiecki	0,237	C	C	C	C	C

Source: Authors on the basis of the results of statutory research carried out in Collegium of Business Administration under the guidance of H. Godlewska-Majkowska in 2015.

Table 2. POTENTIAL INVESTMENT ATTRACTIVENESS OF COUNTIES OF MAZOVIAN 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 and repairs	Accommodation and catering	Professional, scientific and technical activities
Urban communes						
Capital city of Warszawa (u)	0,311	A	A	A	A	A
Ząbki (u)	0,284	A	A	A	A	A
Legionowo (u)	0,284	A	A	A	C	A
Mińsk Mazowiecki (u)	0,277	A	A	A	A	A
Piastów (u)	0,272	A	A	A	D	A
Pruszków (u)	0,271	A	A	A	A	A
Płońsk (u)	0,265	A	A	A	B	A
Podkowa Leśna (u)	0,263	A	A	A	A	A
Siedlce (u)	0,256	A	A	A	A	A
Ostrołęka (u)	0,256	A	A	A	B	A
Marki (u)	0,250	A	A	A	A	A
Płock (u)	0,248	A	A	A	A	A
Milanówek (u)	0,246	A	A	A	A	A
Żyrardów (u)	0,246	A	A	A	C	A
Pionki (u)	0,245	A	A	A	B	A
Kobyłka (u)	0,241	A	A	A	B	A
Ciechanów (u)	0,239	A	A	A	C	A
Garwolin (u)	0,237	A	A	A	B	A
Nowy Dwór Mazowiecki (u)	0,235	A	A	A	A	A
Józefów (u)	0,233	A	A	A	A	A
Radom (u)	0,233	A	A	A	C	A
Sulejówek (u)	0,231	A	A	A	B	A
Otwock (u)	0,223	A	A	A	A	A
Mława (u)	0,218	A	A	A	C	A
Maków Mazowiecki (u)	0,218	A	A	A	C	A
Ostrów Mazowiecka (u)	0,217	A	A	A	C	A
Sokołów Podlaski (u)	0,215	A	A	B	C	A
Sochaczew (u)	0,211	A	A	A	C	A
Zielonka (u)	0,210	A	A	B	A	A
Sierpc (u)	0,208	A	A	A	D	B
Węgrów (u)	0,195	B	B	B	C	B
Przasnysz (u)	0,192	B	B	C	C	B
Gostynin (u)	0,186	C	C	C	C	B
Łaskarzew (u)	0,179	C	C	C	E	C

Regional investment attractiveness 2015

Raciąż (u)	0,174	C	C	D	E	C
Rural communes						
Lesznowola (r)	0,264	A	A	A	A	A
Michałowice (r)	0,262	A	A	A	A	A
Nadarzyn (r)	0,255	A	A	A	A	A
Stare Babice (r)	0,249	A	A	A	A	A
Raszyn (r)	0,249	A	A	A	A	A
Słupno (r)	0,231	A	A	A	A	A
Nieporęt (r)	0,230	A	A	A	A	A
Izabelin (r)	0,222	A	A	A	A	A
Czosnów (r)	0,219	A	A	A	A	A
Jaktorów (r)	0,211	A	A	B	D	B
Żabia Wola (r)	0,208	A	A	B	A	B
Wieliszew (r)	0,203	B	B	B	B	B
Kołbiel (r)	0,201	B	B	B	C	C
Rzekuń (r)	0,200	B	B	B	B	C
Radziejowice (r)	0,200	B	B	B	A	C
Siedlce (r)	0,199	B	B	B	B	C
Jabłonna (r)	0,192	B	B	C	A	B
Pomiechówek (r)	0,190	B	B	C	C	C
Wiązowna (r)	0,186	C	C	C	A	B
Leszno (r)	0,185	C	C	C	B	B
Stara Biała (r)	0,185	C	C	C	D	B
Sarnaki (r)	0,185	C	B	B	B	C
Brańszczyk (r)	0,182	C	C	C	A	D
Teresin (r)	0,181	C	C	D	C	C
Osieck (r)	0,180	C	C	C	B	D
Mińsk Mazowiecki (r)	0,179	C	C	C	B	D
Celestynów (r)	0,178	C	C	C	C	C
Belsk Duży (r)	0,177	C	C	D	E	C
Kampinos (r)	0,176	C	C	C	C	C
Rząśnik (r)	0,174	C	C	C	D	D
Olszewo-Borki (r)	0,173	C	C	D	A	D
Garwolin (r)	0,173	C	C	D	B	C
Górzno (r)	0,173	C	C	D	D	D
Mrozy (r)	0,170	C	C	C	D	D
Lelis (r)	0,170	C	C	D	C	E
Klembów (r)	0,170	C	C	D	D	D
Sochocin (r)	0,170	C	C	D	A	D
Jedlnia-Letnisko (r)	0,169	C	D	D	D	C
Urban-rural communes						
Piaseczno (u-r)	0,253	A	A	A	A	A

Regional investment attractiveness 2015

Konstancin-Jeziorna (u-r)	0,251	A	A	A	A	A
Ożarów Mazowiecki (u-r)	0,246	A	A	A	A	A
Radzymin (u-r)	0,225	A	A	A	A	A
Grodzisk Mazowiecki (u-r)	0,224	A	A	A	A	A
Wyszaków (u-r)	0,224	A	A	A	A	A
Łomianki (u-r)	0,221	A	A	A	A	A
Serock (u-r)	0,220	A	A	A	A	A
Błonie (u-r)	0,219	A	A	A	D	A
Brwinów (u-r)	0,218	A	A	A	C	A
Tarczyn (u-r)	0,217	A	A	A	A	B
Białobrzegi (u-r)	0,209	A	A	B	B	B
Halinów (u-r)	0,209	A	A	B	B	B
Wołomin (u-r)	0,208	A	A	B	D	A
Grójec (u-r)	0,206	B	B	A	B	A
Kozienice (u-r)	0,201	B	B	A	B	B
Góra Kalwaria (u-r)	0,190	B	B	C	C	B
Łosice (u-r)	0,190	B	B	B	C	C
Mszczonów (u-r)	0,188	B	C	C	C	C
Różan (u-r)	0,188	B	B	B	B	C
Karczew (u-r)	0,184	C	C	C	D	B
Nowe Miasto nad Pilicą (u-r)	0,184	C	C	C	B	D
Żelechów (u-r)	0,182	C	C	C	D	C
Pułtusk (u-r)	0,179	C	C	C	C	C
Zwoleń (u-r)	0,178	C	C	C	B	D
Pilawa (u-r)	0,177	C	C	C	B	C
Szydłowiec (u-r)	0,173	C	C	C	C	C
Głinojeck (u-r)	0,171	C	C	D	D	D
Gąbin (u-r)	0,171	C	C	C	C	D
Żuromin (u-r)	0,170	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 (RDB), 2015.

Table 4. EFFECTS OF SPECIAL ECONOMIC ZONE FUNCTIONING AT THE END OF 2014

SEZ	County, commune	Cumulated capital expenditure in million PLN	New jobs number	Leading industries (at least 20% share of revenue or employment)
Warmian-Masurian	Ciechanów (u) Ciechanów	178 900 000,00	417	groceries
Warmian-Masurian	Ciechanów (r) Ciechanów	87 249 332,00	465	services related to publishing
Tarnobrzeg	Garwolin, Pilawa	115 939 300,00	94	chemicals and chemical products, metals,
Łódź	Grodzisk Mazowiecki, Grodzisk Mazowiecki	65 453 269,00	780	machinery and equipment nec
Tarnobrzeg	Grójec, Nowe Miasto nad Pilicą	-	-	no leading industry
Łódź	Capital city of Warszawa, capital city of Warszawa	552 228 288,00	688	paper and paper products
Warmian-Masurian	City of Ostrołęka, city of Ostrołęka	1 713 200,00	-	consumables
Łódź	City of Płock, city of Płock	91 794 574,00	220	rubber and plastic products
Tarnobrzeg	City of Radom, city of Radom	680 917 400,00	2 329	machinery and equipment nec
Tarnobrzeg	City of Siedlce, city of Siedlce	-	-	no leading industry
Tarnobrzeg	Mińsk Mazowiecki, Mińsk Mazowiecki	57 098 500,00	459	paper and paper products
Warmian-Masurian	Mława, city of Mława	751 998 416,00	2 919	computers, electronic and optical products
Warmian-Masurian	Nowy Dwór Mazowiecki, Zakroczym	24 588 440,00	69	storage and support services for transportation
Suwałki	Ostrów, Małkinia Górna	249 940 190,00	294	products of other non-metallic mineral products
Warmian-Masurian	Płońsk, city of Płońsk	-	-	no leading industry

Regional investment attractiveness 2015

Łódź	Płońsk, city of Raciąż	83 852 690,94	91	groceries
Łódź	Pruszków, city of Pruszków	17 199 813,00	145	other products
Tarnobrzeg	Przasnysz, Przasnysz	-	-	no leading industry
Starachowice	Radom, Iłża	-	-	no leading industry
Tarnobrzeg	Radom, city of Pionki	3 060 800,00	56	furniture
Tarnobrzeg	Siedlce, Siedlce	234 968 300,00	1 639	machinery and equipment nec
Łódź	Sochaczew, city of Sochaczew	-	-	no leading industry
Starachowice	Szydłowiec, Szydłowiec	36 697 075,00	181	paper and paper products
Tarnobrzeg	Warsaw West, Ożarów Mazowiecki	149 541 900,00	649	fabricated metal products, except machinery and equipment, computers, electronic and optical products,
Tarnobrzeg	Węgrów, city of Węgrów	27 435 100,00	36	rubber and plastic products
Tarnobrzeg	Wyszków, Wyszków	230 059 800,00	1 209	printing services and services reproduction of recorded media

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

TABLE 5. UNIVERSITIES, FACULTIES AND ITS CATEGORIES

School name	Ministry of Science and Higher Education Category
Vistula University	B - The Institute for Social Affairs and International Relations
	B - The Institute of Risk Management
Academy of Humanities in Pultusk	no data
Kozminski University in Warsaw	A - for the whole university
National Defence Academy	A - Faculty of Management and Command
	B - National Security Division
Maria Grzegorzewska Academy of Special Education in Warsaw	B - Faculty of Educational Sciences
	B - Faculty of Applied Social Sciences
Academy of Fine Arts in Warsaw	A + - Department of Conservation and Restoration of Works of Art
	A - Department of Media Art and Stage Design
	B - Faculty of Graphic Arts
	B - Faculty of Painting
	B - Faculty of Sculpture
	B - Management Faculty of Visual Culture
	B - Department of Design
	C - The Department of Interior
Alexander Zelwerowicz Theatre Academy in Warsaw	B - Acting Department
	B - Department of Puppetry Art
	B - Faculty Awareness Theatre
	B - Directing Faculty
Jozef Pilsudski University of Physical Education in Warsaw	B - Faculty of Physical Education
	B - Faculty of Rehabilitation
	C – Faculty of Tourism and Recreation
ALMAMER School in Warsaw	C - for the entire school
Medical Centre of Postgraduate Education, Warsaw	B - for the entire school
Christian Theological Academy in Warsaw	B - Faculty of Theology

	B - Faculty of Education
Collegium Civitas in Warsaw	A - for the entire school
Masoviense College - School of Health Sciences in Żyrardow	no data
Collegium Mazovia Innovative School in Siedlce	no data
Medical College School of Medical Services, based in Warsaw	no data
Collegium Varsoviense	no data
The European College of Information Economics in Warsaw	no data
European Academy of Social - Technology in Radom	no data
European School of Law and Administration	no data
Linguistic School in Warsaw	no data
State Higher Vocational School in Ciechanow	no data
State Higher Vocational School in Plock	no data
Pontifical Faculty of Theology in Warsaw	no data
Pedagogium School of Social Sciences in Warsaw	no data
Podkowieńska School of Medical Sciences. Sophie and Jonah phloem in Podkowa Forest	no data
Warsaw University of Technology	A - Faculty of Architecture
	A - Faculty of Chemistry
	A – Faculty of Electronics and Information Technology
	A - Faculty of Electrical Engineering
	A – Faculty of Physics
	A - Faculty of Mathematics and Information Science
	A - The Faculty of Power and Aeronautical Engineering
	B - Faculty of Environmental Engineering
	B – Faculty of Civil Engineering
	B – Faculty of Civil Engineering, Mechanics and Petrochemistry

	B – Faculty of Transportation
	B – Faculty of Geodesy and Cartography
	B - Faculty of Automotive and Construction Machinery
	B – Faculty of Production Engineering
	B – Faculty of Management
	B - College of Economics and Social Sciences
	B - Faculty of Administration and Social Sciences
Polish-Japanese University of Technology	A - Faculty of Computer Science
Orthodox Seminary in Warsaw	no data
Private Higher School of Social Sciences, Computer Science and Medical, based in Warsaw	no data
Private College of Environmental Protection in Radom	no data
Radom School	no data
University of Social Sciences and Humanities	A - Department of Psychology
	B - Department of Cultural Studies and Philology
	B - Faculty of Law and Social Sciences
Warsaw University of Life Sciences	A - Faculty of Applied Informatics and Mathematics
	A - Faculty of Veterinary Medicine
	A - Faculty of Civil and Environmental Engineering
	A – Faculty of Animal Sciences
	A - Faculty of Agriculture and Biology
	A - Faculty of Food Science
	B - Faculty of Economics
	B - Faculty of Social Sciences
	B - Faculty of Horticulture, Biotechnology and Landscape Architecture
	B - Faculty of Human Nutrition and Consumer
	B - Faculty of Wood Technology

	B - Faculty of Forestry
	B - Department of Production Engineering
Warsaw School of Economics	A + - Collegium of Economic Analysis
	A + - Collegium of Management and Finance
	A – Collegium of Business Administration
	A – Collegium of Socio-economics
	A - Collegium of World Economy
The Main School of Fire Service	B – Faculty of Fire Safety Engineering
	B - Faculty of Civil Engineering Safety
School of Tourism and Recreation	B - Faculty of Tourism and Recreation
Higher School. Bogdan Jański in Warsaw	B - Faculty of Management in Warsaw
Higher School. Paul Włodkowiec in Plock	no data
School of Family Covenant in Warsaw	no data
Lazarski in Warsaw	B - Faculty of Economics and Management
	B - Faculty of Law and Administration
Helena Chodkowska University of Technology and Economics	no data
The University of Warsaw them. Maria Skłodowska-Curie	no data
Cardinal Stefan Wyszyński University in Warsaw	A - Faculty of Christian Philosophy
	A - Faculty of Theology
	B - Faculty of Mathematics and Natural Sciences
	B - The Faculty of Humanities
	B - Faculty of Canon Law
	B - Law and Administration
	B - Faculty of Educational Sciences
	B – Faculty of History and Social Sciences
	B – Faculty of Family Studies
	B - Faculty of Biology and Environmental Sciences
Fryderyk Chopin University of Music in	A – Faculty of Composition, Conducting and Music Theory

Warsaw	B – Faculty of Sound
	B – Faculty of Choral Conducting, Music Education, Church Music, Rhythmics and Dance
	B - Vocal and Acting Department
	B - Instrumental Faculty
	B - Department of Piano, Harpsichord and Organ
University of Natural Sciences and Humanities in Siedlce	B - Faculty of Economics and Law
	B - The Faculty of Humanities
	B - Faculty of Life Sciences
	B - Faculty of Science
Casimir Pulaski University of Technology and Humanities in Radom	B - Faculty of Transport and Electrical Engineering
	B – Faculty of Materials Science, Technology and Design
	B - Faculty of Mechanical Engineering
	B - Faculty of Arts
	B - Faculty of Economics
	B - Faculty of Languages and Education
	C - Faculty of Health Sciences and Physical Culture
	C – Faculty of Computer Science and Mathematics
University of Warsaw	A + - Faculty of History
	A + - Department of Psychology
	A + - Faculty of Chemistry
	A + - Centre of New Technologies UW
	A + - Faculty of Physics
	A + - Faculty of Mathematics, Computer Science and Mechanics
	A - Faculty of Economics
	A - Faculty of Biology
	A - Faculty of Geology
	A - Faculty of Management
	A - Interdisciplinary Centre for Mathematical and

	Computational Modelling
	A – Faculty of "Artes Liberales"
	A - Centre for the Study of Antiquity for Southeast Europe
	A - Faculty of Oriental Studies
	A - Faculty of Polish Studies
	A - Faculty of Applied Linguistics
	A - Faculty of Law and Administration
	A - Faculty of Philosophy and Sociology
	A - Institute of America and Europe
	A - Faculty of Journalism and Political Science
	B - Faculty of Modern Languages
	B - Prof. Kazimierz Michalowski Centre of Mediterranean Archaeology UW
	B - Faculty of Applied Social Sciences and Rehabilitation
	B - Professor Robert Zajonc Institute of Social Studies
	B - Centre for Migration Research
	B - Faculty of Education
	B - European Centre of Warsaw University
	B - Faculty of Geography and Regional Studies
	B - Heavy Ion Laboratory at UW
VIAMODA School in Warsaw	no data
Warsaw Film School in Warsaw	no data
Warsaw School of Management - University in Warsaw	no data
Edward Vishnevsky Warsaw School of Economics in Warsaw	no data
Boleslaw Prus Warsaw School of Humanities	no data
Warsaw School of Computer Science in Warsaw	C - for the entire school
Medical University of Warsaw	A - Faculty of Pharmacy and Laboratory Medicine
	A- Faculty of Health Sciences Faculty of Nursing, Faculty of

	Public Health, Faculty of Nutrition
	A - First Faculty of Medicine
	B - Faculty of Medicine and Dentistry
	B - Second Faculty of Medicine and Faculty of Teaching in English, Faculty of Physiotherapy
Military University of Technology. Jaroslaw Dabrowski	A – Faculty of Optoelectronics
	A – Faculty of New Technologies and Chemistry
	B – Faculty of Electronics
	B – Faculty of Cybernetics
	B - Faculty of Mechanical Engineering
	B - Faculty of Mechatronics and Aviation
	C - Faculty of Civil Engineering and Geodesy
Polish University College in Warsaw	no data
Higher Engineering School Safety and Labour Organization in Radom	no data
College - Education in Sport in Warsaw	no data
Higher School of Public Administration in Ostroleka	no data
School of Social Administration in Warsaw	no data
School of Art in Warsaw	no data
School Safety and them. Marshal Jozef Pilsudski in Warsaw	no data
College of Business and Management in Ciechanowie	no data
College of Business them. Bishop John Chrapek in Radom	no data
School of Ecology and Management in Warsaw	C - Faculty of Management
	C – Faculty of Ecology
	C – Faculty of Architecture
Higher School of Economic and Social Ostroleka	no data
University of Finance and Management in	A - Faculty of Management and Finance

Warsaw	A - Faculty of Psychology
	B - Faculty of Law and Administration
	B - Faculty of Political Science
Higher School of Economics Euroregional them. Alcide De Gasperi in the suburbs	B - for the entire school
School of Real Estate Management in Warsaw	no data
Higher School of Commerce in Radom	no data
Academy of International Trade and Finance to them. Warsaw Fryderyk Skarbek	no data
School of Applied Technology and Management in Warsaw	C - Faculty of Informatics
School of Computer Science, Management and Administration in Warsaw	C - Faculty of Social Sciences and Administration
School of Computer Science, Management and Administration in Warsaw	C - Faculty of Social Sciences and Administration
College of Engineering and Health in Warsaw	no data
College of Communication and Social Media them. Jerzy Giedroyc in Warsaw	no data
College of Communication, Political Science and International Relations in Warsaw	no data
School of Physical Culture and Tourism them. Halina KONOPACKI in Pruszkow	no data
School Mazowiecki in Warsaw	no data
School of Management in Warsaw	no data
School of Law and Administration at them. Leon Petrażycki based in Wołominie	no data
College of Social Sciences. Ks. J. Majka in Minsk Mazowiecki	no data
Academy of Tourism and Hotel Management in Warsaw in liquidation	no data
Pedagogical University. Janusz Korczak in Warsaw	no data
Pedagogical University of Polish Teachers' Union in Warsaw	no data

School Promotion, media and show business, based in Warsaw	no data
Academy of Social Sciences in Otwock	no data
School of Entrepreneurship in Warsaw with its seat in Warsaw	no data
School of Rehabilitation in Warsaw	no data
School of Local Development in Żyrardów	no data
Higher School of Social and Economics in Warsaw	no data
School of International Relations and American in Warsaw	no data
School of Film and Theatre, based in Warsaw	no data
Higher College of Technology and Economics in Warsaw	no data
School of Information Technology in Warsaw	no data
Sports Trainers School in Warsaw	no data
College of Tourism and Foreign Languages in Warsaw	no data
College of International Cooperation and Regional them. Zygmunt Gloger, based in Wołominie	no data
School of Management and Marketing in Sochaczew	no data
Academy of Personnel Management in Warsaw	no data
Academy of Cosmetics and Health Care in Warsaw	C - Academy of Cosmetics and Health Care in Warsaw

Source: Authors' own work based on the Official Journal of the Ministry of Science and Higher Education Warsaw, 9 July 2014 .; Item 38; Communication from the Minister of Science and Higher Education of July 4, 2014 year; of scientific terms granted to scientific institutions.

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