

Warsaw School of Economics



# REGIONAL INVESTMENT ATTRACTIVENESS 2015

## Subcarpathian Voivodship

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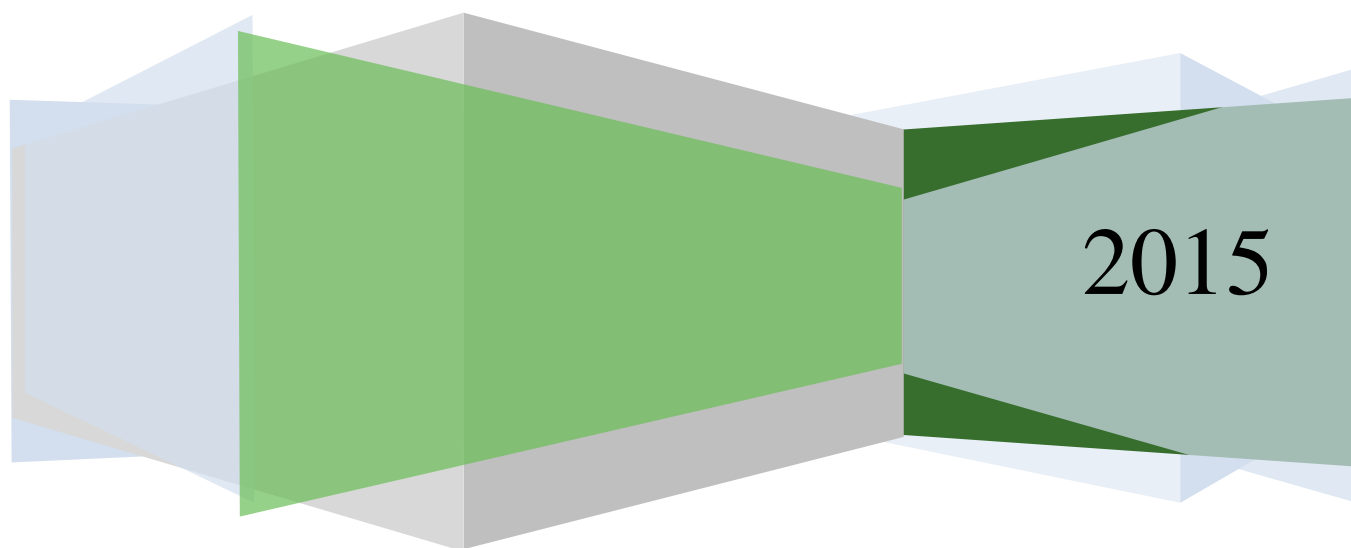
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**PAIiZ provides free of charge professional advisory services for investors, including:**

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- information on legal and economic environment;
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- identification of potential suppliers and contractors;
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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)**.

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## INTRODUCTION

The report has been prepared to order of the Polish Information and Foreign Investment Agency and is the next edition of the regional investment attractiveness reports. The reports have been published since 2008. They are the result of scientific research conducted since 2002 under the supervision of 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 Subcarpathian 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 – 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.

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<sup>1</sup> 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 SUBCARPATHIAN VOIVODSHIP

**Subcarpathian voivodship** is located on the south-eastern Poland. It borders with Slovakia (in the south) and Ukraine (in the east). The region is famous because of mining: such as sulphur, crude oil and natural gas, as well as minerals: gypsum, sandstone and limestone mined to date in the active modern mines. The main sectors are: agriculture, industry, mining, food, pharmaceutical, aerospace and information technology.

### **The main advantages of the region are:**

- developing aviation industry,
- very well developed pharmaceutical industry, information technology and food processing,
- establishing Subcarpathian Science and Technology Park in Rzeszów,
- good transport connections: an international airport, the A4 motorway, running through the county main transport corridors TINA network,
- mining raw materials such as sulphur, oil and gas, minerals that are mined mainly in the mountainous southern part: sandstone, limestone, gypsum (including gypsum alabaster), ceramic clays, sands (including glass sands) and gravel, and peat, mineral and geothermal,
- large tracts of state forests make a significant supplier of wood and offer the possibility of using wood biomass for renewable energy production,
- availability of highly trained personnel and technical management especially in the aerospace, electrical engineering, chemical (Rzeszów University of Technology and is the largest technical university south-eastern Polish, with the only training centre in the country's civil aviation pilots).

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

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

Feature	Subcarpathian voivodship	Poland	Share [%]
<b>Market potential</b>			
GDP per capita 2013 (PLN/person)	30698	43175	-
Population (persons) on 31 December 2014	2.129.187	38.478.602	5,5%
<b>Human resources potential</b>			
Higher education institutions graduates (persons) in 2014	19300	424317	4,5%
Secondary schools graduates (persons) in 2014	17549	271333	6,5%
Number of employed persons in 2014 (in thousands)	777	15859	4,9%
Structure of employed persons in 2013	agriculture 16.2% industry 31.2% service 52.6%		11.5% 30.5% 58.0%
<b>Investment outlays and capital of companies with foreign capital participation in the voivodship</b>			
Investment outlays (PLN m) in 2013	1390,3	75105,1	1,9%
Capital of companies (PLN n) in 2013	5981,7	209130,1	2,9%
<b>Special Economic Zones (SEZs) in the voivodship*</b>			
<ul style="list-style-type: none"> <li>– Kraków</li> <li>– Mielec</li> <li>– Tarnobrzeg</li> </ul>			
<b>Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAII_GN)</b>			
<b>Counties</b>	Class A	City of Krosno, city of Przemyśl, city of Rzeszów, city of Tarnobrzeg	
	Class B		
<b>Communes</b>	Class A	Boguchwała (u-r), Dębica (u), Dębica (r), Jarosław (u), Jasło (u), Krosno (u), Krościenko Wyżne (r), Leżajsk (u), Lubaczów (u), Łańcut (u), Mielec (u), Przemyśl (u), Przeworsk (u), Rzeszów (u), Sanok (u), Stalowa Wola (u), Tarnobrzeg (u)	
	Class B	Dukla (u-r), Głogów Małopolski (u-r), Gorzyce (r), Iwonicz-Zdrój (u-r), Krasne (r), Medyka (r), Miejsce Piastowe (r), Nowa Dęba (u-r), Nowa Sarzyna (u-r), Ostrów (r), Radymno (u), Ropczyce (u-r), Solina (r), Tryńcza (r), Trzebownisko (r), Żyraków (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 2129187 (as of 2014), which is 5.5% of the population of Poland. The age structure in the voivodship in 2014 was as follows: 18.8% of the population at pre-productive age, 63.7% at productive age and 17.7% 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 14 higher education institutions in which there are 59000 students studying, which makes up 4% of all students in Poland.

The main potential for human capital formation in the region represents 14 universities, which educates 59 thousand students, or 4% of students in the country. According to a report prepared by the Committee for Evaluation of Research (KEJNA) for the Ministry of Science and Higher Education in the Subcarpathian voivodship 2 faculties of universities has received scientific category A; 12 faculties received a category - B; and 2 faculties category - C. It is also worth mentioning that 12 colleges had not received any category awarded by KEJNA. Detailed information can be found in Appendix Table 5.

In addition, 10.6% of the secondary school students in the voivodship attend vocational schools and 34.7% attend technical schools.

The registered unemployment rate in the voivodship amounted to 12.8% in August 2015, compared to 97%<sup>2</sup> in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2015 amounted to PLN 3231.1, which is 86% of the average for Poland.

In 2013 Subcarpathian voivodship made a contribution of 3.9% to the GDP of Poland. Calculated per capita, it amounted to PLN 30698 with the average for Poland PLN 43175. With this result the voivodship takes the 15th place in the country. The GDP growth rate in the voivodship in the years 2003-2013 amounted to 199.0% 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 52.6% whereas a share of the agricultural and industrial sectors are respectively 16.2% and 31.2% (Central Statistical Office, Local Data Bank 2015).

Important industry sectors in the voivodship are: manufacture of rubber and plastic products (13% of the value of sold production in whole voivodship at the end of 2014), the production of motor vehicles, trailers and semi-trailers, with the exception of motorcycles (11%), manufacture of other transport equipment (10%), manufacture of food products (8%), manufacture of fabricated metal products, (10%), manufacture of products of wood and cork, except furniture, with the production of articles of straw and plaiting materials (8%).

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<sup>2</sup> The unemployed and the unemployment rate according to voivodship, sub-regions and counties (as of the end of August 2015). Central Statistical Office.

The region is the leading manufacturer of aviation equipment on a national scale, which is reflected in a 23% share of the region in the national value of sold production of "manufacture of other transport equipment". Subcarpathian voivodship is also an important manufacturer of products of wood and cork, straw and wicker (10% of the national value of sold production in 2014), as well as rubber and plastic products (7%).

When it comes to the 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>3</sup>.

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: aviation industry, electrical machinery, agri-food, chemical, tourism.

For the entrepreneurs willing to invest in Subcarpathian 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 Subcarpathian voivodship self-government, based on the observations on investments inflows to the voivodship.

**The high potential sectors on the list include:**

- aviation industry,
- informatics,
- foundry.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Kraków, Mielec, Tarnobrzeg, in the following subzones:**

- **SSE Kraków** subzones: Boguchwała (u-r), Nowa Sarzyna (u-r),
- **SSE Mielec** subzones: Dębica (u), Dębica (r), Głogów Małopolski (u-r), Jarosław (u), Jarosław (r), Kolbuszowa (u-r), Leżajsk (u), Leżajsk (r), Lubaczów (u), Łańcut (u), Mielec (u), Ostrów (r), Radymno (r), Ropczyce (u-r), Rzeszów (u), Sanok (u), Sędziszów Małopolski (u-r), Trzebowno (r), Zagórz (u-r), Laszki (r), Krosno (u),
- **SSE Tarnobrzeg** subzones: Gorzyce (r), Jasło (u), Jasło (r), Jedlicze (u-r), Nisko (u-r), Nowa Dęba (u-r), Orły (r), Przemyśl (u), Rymanów (u-r), Stalowa Wola (u), Tarnobrzeg (u), Baranów Sandomieski (u-r), Grębów (r), Majdan Królewski (r), Przeworsk, (u).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 50% - 70%, 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).

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<sup>3</sup>Calculations based on Statistical Bulletin for the voivodship, first quarter 2015 and first quarter of Statistical Bulletin 2015 [www.stat.gov.pl](http://www.stat.gov.pl) (10/11/2015).



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

Subcarpathian voivodship is one of the regions with high development potential associated with the growing aviation sector. The last time the region has increased its investment attractiveness for the industry, entering the ranks regions assessed above average.

Based on the methodology prepared by the team of the Institute of Enterprise 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.<sup>4</sup>

Based on the above-mentioned indices it can be stated that the voivodship is taking 249th place of 270 regions (in comparison with other EU regions, NUTS2), for whom the indices were calculated. The voivodship is characterized by very low class of investment attractiveness (class F) However, compared to the previous year, the voivodship increased its position by 8 places. Subcarpathian voivodship has a competitive advantage, when it comes to human capital, ranked class C.

Due to different methodology of research and variables taken into account for regions in Poland only and regions in the EU, the results of research are incomparable. This is because not all data are available for all the regions, e.g. data on infrastructure.

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

- **in Bulgaria:** Severen tsentralen, Severozapaden, Yugoiztochen, Yuzhen tsentralen;
- **in Greece:** Dytiki Makedonia, Peloponnisos, Sterea Ellada;
- **in Spain:** Extremadura;**in Portugal:** Alentejo;
- **in Romania:** Centru, Nord-Est, Nord-Vest, Sud - Muntenia, Sud-Est, Sud-Vest Oltenia;
- **in Italy:** Calabria, Puglia, Sicilia.

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<sup>4</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/>

### 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.

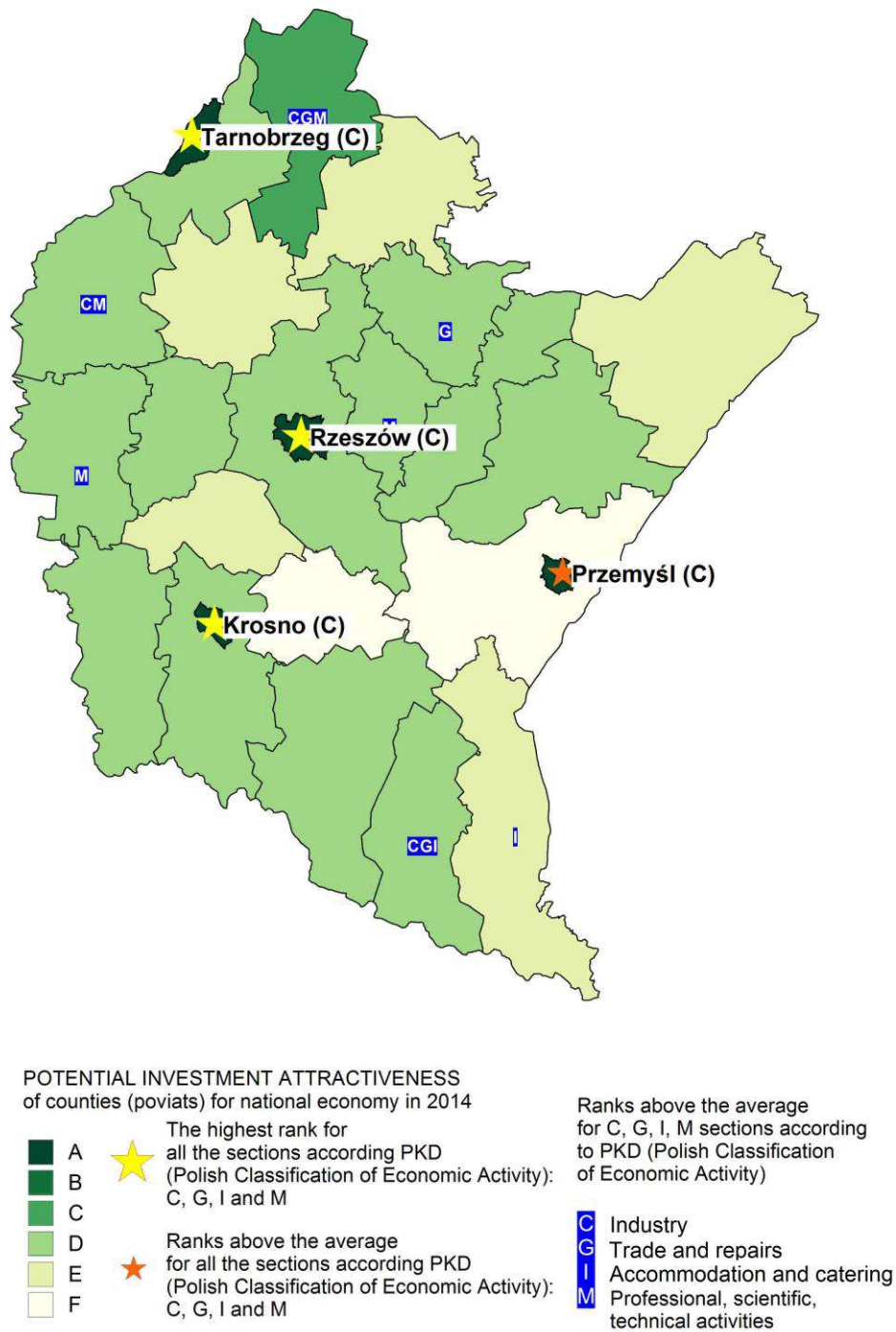
**Market conditions** informs on market absorptive power that means the number of potential customers and indirectly on their wealth that means ability to buy goods and services.

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 Subcarpathian voivodship, considering the most attractive sections**

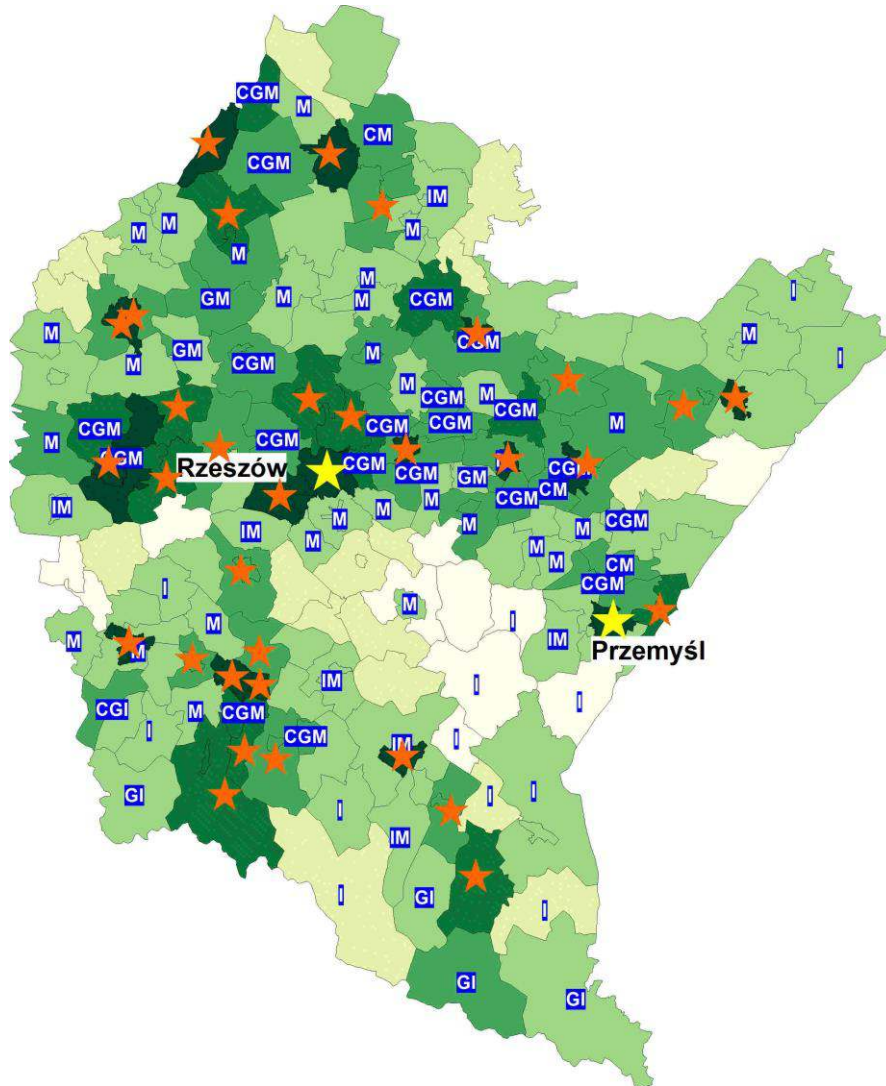


**Golden star counties:**

Krosno, Rzeszów, Tarnobrzeg

Source: Author's own work.

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



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

- |  |   |  |
|--|---|--|
| <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: #006633; border: 1px solid black; margin-right: 5px;"></span> B</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #009933; border: 1px solid black; margin-right: 5px;"></span> C</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #99cc99; border: 1px solid black; margin-right: 5px;"></span> D</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #cccc99; border: 1px solid black; margin-right: 5px;"></span> E</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #ffff99; border: 1px solid black; margin-right: 5px;"></span> F</li> </ul> | <ul style="list-style-type: none"> <li><span style="display: inline-block; width: 15px; height: 15px; background-color: #ffff00; border: 2px solid black; border-radius: 50%; margin-right: 5px;"></span> The highest rank for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #ff6600; border: 1px solid black; border-radius: 50%; margin-right: 5px;"></span> Ranks above the average for all the sections according PKD (Polish Classification of Economic Activity): C, G, I and M</li> </ul> | <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"> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #003366; border: 1px solid black; text-align: center; vertical-align: middle; font-size: 8px;">C</span> Industry</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #003366; border: 1px solid black; text-align: center; vertical-align: middle; font-size: 8px;">G</span> Trade and repairs</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #003366; border: 1px solid black; text-align: center; vertical-align: middle; font-size: 8px;">I</span> Accommodation and catering</li> <li><span style="display: inline-block; width: 10px; height: 10px; background-color: #003366; border: 1px solid black; text-align: center; vertical-align: middle; font-size: 8px;">M</span> Professional, scientific, technical activities</li> </ul> |
|--|---|--|

**Golden star communes:**

Przemyśl (u), Rzeszów (u)

Source: Author's own work.

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 **distinguished with golden star** cities are: Krosno, Rzeszów, Tarnobrzeg. The highest ranked **distinguished with an orange star** is Przemyśl.

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

- **distinguished with golden star:** Przemyśl (u), Rzeszów (u),
- **distinguished with an orange star:** Dębica (u), Jasło (u), Krosno, (u), Leżajsk (u), Lubaczów (u), Łańcut (u), Mielec (u), Przeworsk (u), Sanok(u), Stalowa Wola (u), Tarnobrzeg (u).

**Among rural communes** the highest rank communes include:

- **distinguished with an orange star:** Jarosław (r), Korczyna (r), Krościenko Wyżne (r), Medyka (r), Mielec (r), Ostrów (r), Solina (r), Trzebownisko (r).

**Among urban-rural communes** the highest rank communes include:

- **distinguished with an orange star:** Boguchwała (u-r), Dukla (u-r), Głogów Małopolski (u-r), Iwonicz-Zdrój (u-r), Jedlicze (u-r), Lesko (u-r), Nisko (u-r), Nowa Dęba (u-r), Oleszyce (u-r), Ropczyce (u-r), Rymanów (u-r), Sędziszów Małopolski (u-r), Sieniawa (u-r), Strzyżów (u-r).

## 4. VOIVODSHIP'S INSTITUTIONAL SUPPORT FOR INVESTORS AND ENTREPRENEURS

The development of business environment 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 Assistance 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 Subcarpathian voivodship such centre is:  
Investor Assistance Centre operating within the structure of  
Rzeszów Regional Development Agency SA**  
[www.coi.rzeszow.pl](http://www.coi.rzeszow.pl)



**Subcarpathian Investor Assistance Centre** is a partner of the Polish Information and Foreign Investment Agency and a one stop shop: a source of regional information that is 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:**

**Chamber of Industry and Commerce in Rzeszów ([www.iph.rzeszow.pl](http://www.iph.rzeszow.pl))**

The chamber is an organization offering: information, training, counselling, promotion and marketing, legalization of export documents, issuing certificates of origin of goods, organization of courses, seminars, workshops, training, trade missions, assistance in matching companies, help with finding financing. The chamber also provides advisory services and assistance in preparation of documents for companies applying for grants and funding from the government and the EU. The Chamber acknowledges the best performing firms in their business award "Leader of the Subcarpathian voivodship", as well as certifications "Reliable Company" for businesses operating in the Subcarpathian voivodship as well as beyond its borders.

**Subcarpathian Business Club ([www.pkb.net.pl](http://www.pkb.net.pl))**

The club was founded to support and integrate the businesses and Subcarpathian employers. The club organizes joint purchasing groups and builds prestige of Subcarpathian entrepreneurship. Goals of the club are: helping members, co-operating with the authorities in the implementation of

projects of importance for the region and the members of the Club, participating in public consultation, preparing expertise and inquiries on matters relating to the business community, organizing and conducting system of advisory and consulting, training, seminars and conferences, conducting information system serving economic contacts, organizing trade missions, meetings and other club events, promotions, banquets and exhibitions. In 2012. GDP Loan Fund was established from own funds of the club. On the website of the Club operates sales platform that enables members of the Club of the sale of goods and services.

#### **Business Promotion Centre in Rzeszów ([www.cpb.rze.pl](http://www.cpb.rze.pl))**

The Centre supports companies from Subcarpathian voivodship by their promotion. The main goal of the Centre is to help companies in creating a positive image. The Centre offers web development and hosting services - maintenance of websites, file servers and databases. The Centre operates such projects as: Fair Play Entreprise, Employment Fair Play, Subcarpathian Economic Award, Subcarpathian Quality Award, Subcarpathian Service Economic Program "Tasty Because Subcarpathian".

#### **Science and Technology Park of Podkarpacie - AEROPOLIS ([www.aeropolis.com.pl](http://www.aeropolis.com.pl))**

It is the first industrial park in Poland, which is to uphold the traditions of aviation. The main objective of the Park is to facilitate the establishment of both big investors and small and medium-sized enterprises, with a particular focus on innovative enterprises and introducing products / services technologically advanced. AEROPOLIS is an idea for acquiring new technologies and at the same time exploiting the potential of local universities and research centers - research. Park offer includes: investment areas, providing office space for rent, production - service, production, and conference rooms, the Academic Pre-incubator and Technology Incubator, support services for businesses located in the Park, networking, business brokerage services and auxiliary assistance in raising funds (including the EU).

#### **Industry Park in Mielec ([www.marr.com.pl](http://www.marr.com.pl), <http://www.intech-mielec.pl>)**

The Regional Development Agency (MARR) is responsible for managing the Park. The aim of the Construction of New Technology Incubator In-Tech, along with the expansion of the Industry Park Mielec implemented under Measure I.3. Operational Programme Development of Eastern Polish 2007-2013, project is preparation of land for economic activity through modernization and expansion of the existing technical infrastructure and building new infrastructure necessary for the proper functioning of the Park. In addition, the goal of the project is to provide potential investors with manufacturing and service area to do business. Through the project, were armed 12.6365 ha of investment areas, built and modernized production area and service on the basis of the purchased equipment was set up facilities research - development (laboratory and prototype) available for innovative micro, small and medium-sized enterprises. Incubators offer New Technologies TECH IN-1 and IN-TECH 2 includes services related to: rental of office space, social and economic infrastructure of the full basic internal and external, as well as renting conference rooms.

**Industry and Technology Park in Tarnobrzeg ([www.tppt.tarnobrzeg.pl](http://www.tppt.tarnobrzeg.pl))**

The main goal of the park is to increase the investment attractiveness of the Subcarpathian region and stimulate local entrepreneurship by providing good conditions for conducting business. The goal is being achieved through increasing innovation of local economy, effective management of post-productive assets and providing infrastructure services and consulting. In the park investors can find three zones, including: industrial zone (production hall) and technology zone (Technology Incubator). In addition, the Park offer includes investment areas. The area of the park is a part of Tarnobrzeg Special Economic Zone called EURO-PARK WISŁOSAN. In facilities of Park investors can start their business in innovative technologies, as well as companies who offer service and consulting providing services for entrepreneurs operating in the Park.

**Regional Development Agency in Rzeszów ([www.rarr.rzeszow.pl](http://www.rarr.rzeszow.pl))**

The aim of the agency is to carry out activities for development of the Subcarpathian voivodship by focusing and mobilizing the potential of local and advisory activities and services in restructuring processes, opening and supporting business ventures, promotion of the region and attract foreign capital. The offer includes: consultancy, training, building design, as well as organization of trade missions. Operates within the Agency Loan Fund. Moreover Agency offers services related to directory listings and technological needs network of technological exchange IRC - Innovation Relay Centres Network (directory contains listings and inquiries made by technology companies, universities, R & D centres and laboratories). The Agency also provides consulting services related to obtaining funds from the EU funds for investment projects.

**MARR Regional Development Agency ([www.marr.com.pl](http://www.marr.com.pl))**

The Agency's role is to initiate, organize and support the restructuring and economic development through the integration of Mielec County people and institutions. The offer includes: training, advisory, accounting, financial services (within the Agency operates Loan Fund providing investment and working capital loans to the sector of micro, small and medium-sized enterprises investing in Podkarpacie). In the structures MARR operates Mielec Industrial Park, Incubator of New Technologies, Measurement Laboratory and Prototype, as well as agency real estate agents. Regional Development Agency MARR SA Regional was the operator of the Regional Centre for Vocational Education and New Technologies in Strzyzow offering specialized courses and training in modern laboratories equipped with machinery and equipment with high technical parameters and teaching.

**Regional Development Agency in Tarnobrzeg ([www.tarr.pl](http://www.tarr.pl))**

TARR offer includes: sharing office space to conduct business within the Business Incubator, financial support (Loan Fund), help with applying for financial support from external sources, training, organization of trade missions, association of Polish and foreign partnerships, local government units, assistance for projects in the field of development of investment areas Tarnobrzeg Industry and Technology Park (Agency is the operator of the Park). Agency gives the opportunity to do business as part of the Academic Business Incubator. The Agency is one of the founding members of the group for the automotive cluster Automotive Alliance East.



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

There are three SEZ operating in the Subcarpathian voivodship: Mielec, Tarnobrzeg i Kraków. At the end of 2014 the areas of the SEZ were parts of 13 cities and 20 communes (in Krosno there are 2 SEZ: Kraków i Mielec) – see Chart 3.

The Subcarpathian SEZs were created in 1995. Till the end of 2013 the enterprises operating in the Subcarpathian SEZ's subzones have invested PLN 8.7 bln in this area which is 8% of all investment outlays in the Polish SEZs. In the same time the enterprises created 26.9 thousand new jobs in the region, which was 12% of all new jobs created in the Polish economic zones - see Table 4 in the Appendix.

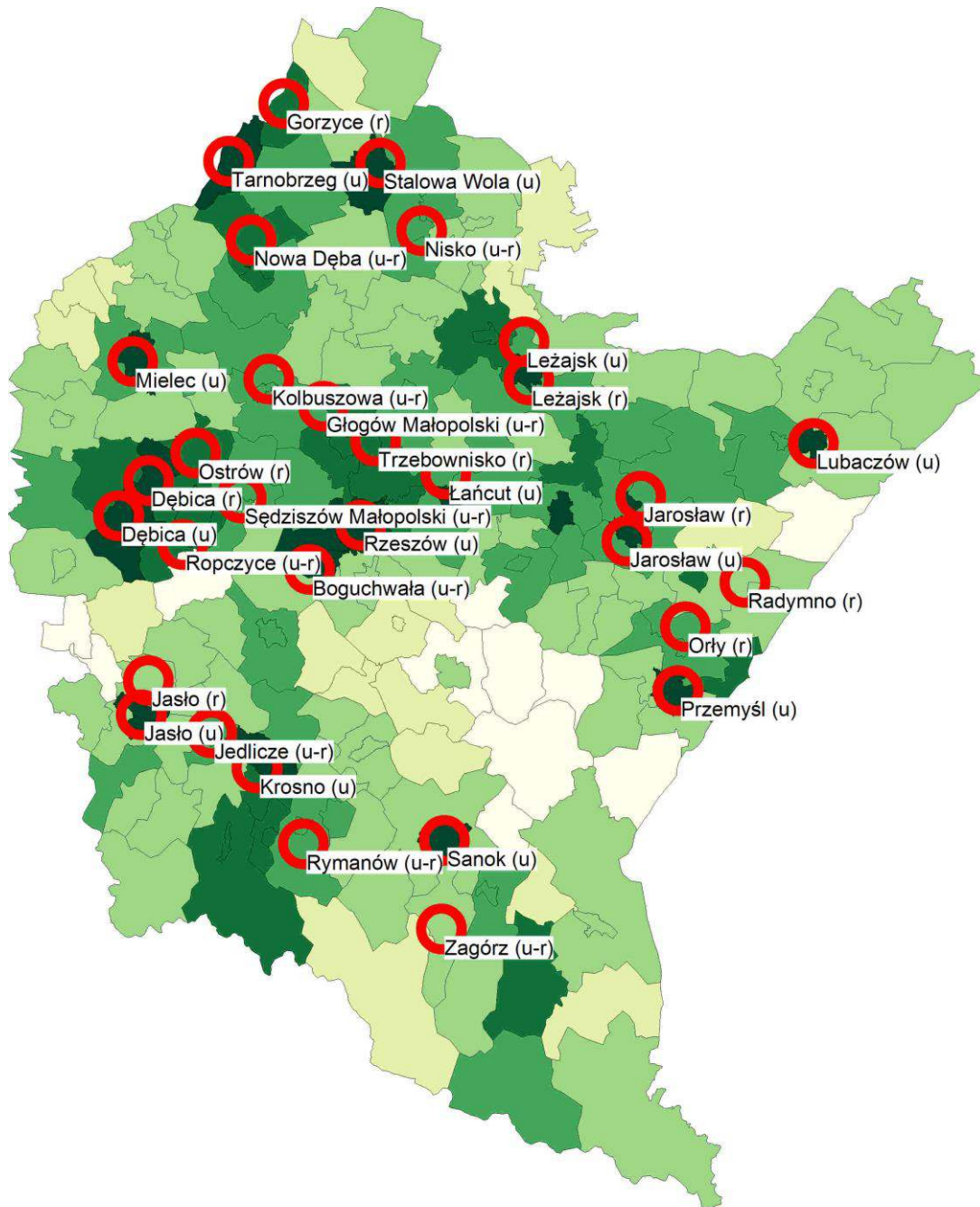
### **Investments of highest value came to Mielec and Stalowa Wola.**

The structure of investments in Mielec is dominated by wood and products of wood and cork, except furniture and articles of straw and materials of a kind used for weaving Swedwood Poland Sp. z o.o. and because of the number of operators dominate rubber and plastic products: Plastic Factory COBI SA, Plastwag SA, Polish - Korean PP-H JOONGPOL Sp. z o.o., Ltd. Wojciech Tycner, SAMDEX Sp. z o.o., Tamar Sp. z o.o., ZPTSz "PZL - Mielec" Sp. z o.o., fabricated metal products: Alpha Technology Sp. z o.o. Sp. k., BASCO 2 Andrzej Nawrot & Partners. J., Casmet - The Joseph Malecki, DUL MAR Sp.j., Eurotech Sp. z o.o., the company Tarapata Sp. z oo, FPUH Mechanics Lesniak Danuta and Adam, METALPOL Sp. z o.o., Ltd. P & S Sp. z o.o., REGMOT Sp. z o.o., RSM Zakł.Prod. Machinery and Equipment Sp. z o.o., RENNtech Sp. z o.o. SSC Sp. z o.o. Limited Partnership, FPU WALDREX sc, Yasa Motors Poland Sp. z oo, Department of Furniture Accessories Gładysiek Sp. j., EC AVIOTECH Sp. o.o (d. Plant Tool PRODREM Sp. z oo), Department of "RPOL" Roman Polit and motor vehicles: King & Fowler Poland Sp. z o.o., Kirchhoff Poland Sp. z oo, Gardner Aerospace - Mielec Company zoo, Remog Poland Sp. z o.o., WAW Mielec Sp. z oo, GALWEX Onions Elvira & Partners Sp.j., Leopard Automobile Mielec Sp. z oo, STAMET - Stanislaw Stachura, Automotive Coachbuilding and Design Sp. z oo Production Plant Kamot-Mielec SA, Lear Corporation Poland II Sp. z o.o., MELEX A & D Tyszkiewicz SJ In Stalowa Wola dominates production of metal and aluminium processing: ATS Stahlschmidt & Maiworm Sp. z o.o., HSW - Department Forge Forging Sp. z o.o., MCS-METAL CLEANING SERVICE Sp. z o.o., Uniwheels Production Poland Sp. z o.o., Eurometal SA, IWAMET Sp. z oo, Ltd. Domostal sc, Department of Mechanical Engineering "TASTA" Sp. z o.o., RAKOCZY STEEL Sp. Public, BAGPAK Poland Sp. z o.o., WOBI STEEL Sp. z o.o..

According to the Subcarpathian SEZ development plan, the voivodship intends to acquire the following kinds of investors:

- contributing to the development of the cluster "Aviation Valley" and the investment of electrical engineering and chemical industry, supporting industry traditions of the region for Kraków SEZ and SEZ Mielec,
- developing traditional industries to the region, especially the chemical, construction materials and electrical engineering, processing of aluminium, for Tarnobrzeg SEZ.

Chart 3. The location of SEZs in Subcarpathian voivodship



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



Source: Authors' own work.

## 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
<b>Voivodships</b>						
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
SUB-CARPATHIAN	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-MAZURIAN	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 (2015).

**Table 2. POTENTIAL INVESTMENT ATTRACTIVENESS OF COUNTIES OF SUBCARPATHIAN 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 activity
<b>Counties</b>						
city of Rzeszów	0,338	A	A	A	A	A
city of Krosno	0,326	A	A	A	A	A
city of Tarnobrzeg	0,310	A	A	A	A	A
city of Przemyśl	0,283	A	B	A	A	A
Stalowa Wola	0,234	C	C	C	D	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 (2015).

**Table 3. POTENTIAL INVESTMENT ATTRACTIVENESS OF COMMUNES OF SUBCARPATHIAN 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 activity
<b>Urban communes</b>						
Rzeszów (u)	0,253	A	A	A	A	A
Krosno (u)	0,253	A	A	A	B	A
Mielec (u)	0,242	A	A	A	B	A
Tarnobrzeg (u)	0,239	A	A	A	B	A
Jasło (u)	0,236	A	A	A	C	A
Łańcut (u)	0,234	A	A	A	B	A
Sanok (u)	0,231	A	A	A	B	A
Dębica (u)	0,229	A	A	A	B	A
Przemyśl (u)	0,229	A	A	A	A	A
Przeworsk (u)	0,225	A	A	A	C	A
Stalowa Wola (u)	0,225	A	A	A	B	A
Jarosław (u)	0,224	A	A	A	D	A
Leżajsk (u)	0,219	A	A	A	B	A
Lubaczów (u)	0,209	A	A	A	C	A
Radymno (u)	0,206	B	A	B	D	A
<b>Rural communes</b>						
Krościenko Wyżne (r)	0,216	A	A	A	B	A
Dębica (r)	0,214	A	A	C	D	A
Trzebownisko (r)	0,206	B	B	B	C	A
Ostrów (r)	0,202	B	B	B	B	C
Krasne (r)	0,202	B	B	B	D	A
Solina (r)	0,199	B	A	A	A	C
Medyka (r)	0,197	B	B	B	A	B
Gorzyce (r)	0,197	B	B	B	E	B
Tryńcza (r)	0,191	B	C	B	E	B
Żyraków (r)	0,191	B	B	C	E	B
Miejsce Piastowe (r)	0,189	B	C	B	D	B
Świlcza (r)	0,187	C	C	C	D	A
Czarna (r)	0,186	C	C	C	E	B
Jarosław (r)	0,185	C	C	C	C	B

Łańcut (r)	0,184	C	C	C	E	B
Korczyna (r)	0,182	C	C	C	B	C
Białobrzegi (r)	0,182	C	C	C	E	B
Żurawica (r)	0,181	C	C	C	E	B
Leżajsk (r)	0,180	C	C	C	E	C
Orły (r)	0,179	C	C	D	F	B
Pawłosiów (r)	0,178	C	C	D	E	B
Mielec (r)	0,178	C	C	C	C	B
Zarzecze (r)	0,176	C	C	C	E	B
Besko (r)	0,176	C	C	C	F	B
Żołyńia (r)	0,176	C	C	C	E	B
Grębów (r)	0,175	C	C	C	E	C
Dębowiec (r)	0,174	C	C	C	C	D
Pysznicza (r)	0,173	C	C	D	D	C
Czarna (r)	0,172	C	D	D	D	C
Wiązownica (r)	0,171	C	D	D	E	C
Cmolas (r)	0,170	C	D	C	E	C
Przeworsk (r)	0,170	C	D	D	F	B
Majdan Królewski (r)	0,170	C	D	D	E	C
Cisna (r)	0,169	C	D	C	A	D
<b>Urban-rural communes</b>						
Boguchwała (u-r)	0,210	A	A	B	C	A
Nowa Dęba (u-r)	0,200	B	B	B	C	A
Głogów Małopolski (u-r)	0,199	B	B	B	B	A
Ropczyce (u-r)	0,196	B	B	C	C	A
Dukla (u-r)	0,194	B	B	B	A	C
Nowa Sarzyna (u-r)	0,189	B	B	B	D	B
Iwonicz-Zdrój (u-r)	0,188	B	C	C	C	B
Jedlicze (u-r)	0,188	C	C	C	B	B
Nisko (u-r)	0,186	C	C	C	A	B
Lesko (u-r)	0,184	C	C	C	A	C
Sędziszów Małopolski (u-r)	0,183	C	C	C	C	B
Rymanów (u-r)	0,180	C	C	C	B	B
Kolbuszowa (u-r)	0,180	C	C	C	E	B
Sieniawa (u-r)	0,175	C	C	C	C	C
Strzyżów (u-r)	0,175	C	C	C	B	C
Oleszyce (u-r)	0,174	C	C	C	C	B
Sokołów Małopolski (u-r)	0,172	C	D	D	E	C
Kańczuga (u-r)	0,170	C	D	D	E	C

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

Source: As for Table 1., Note: All the indices in the report have been calculated on the basis on the most up-to-date data from the Local Data Bank (LDB), 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)
Mielec	Dębica, Dębica	306 448 612,00	246	rubber and plastic products
Mielec	Dębica, city of Dębica	305 278 936,00	2 836	rubber and plastic products
Mielec	Jarosław, Jarosław	2 316 841,00	2 228	motor vehicles (excluding motorcycles), trailers and semi-trailers
Mielec	Jarosław, Radymno	-	-	no leading industry
Mielec	Jarosław, city of Jarosław	-	-	no leading industry
Tarnobrzeg	Jasło, Jasło	-	-	no leading industry
Tarnobrzeg	Jasło, city of Jasło	85 591 500,00	1 443	wood and products of wood and cork, except furniture; articles of straw and materials of a kind used for weaving, furniture,
Mielec	Kolbuszowa, Kolbuszowa	206 774,00	-	storage and support services for transportation
Tarnobrzeg	Krosno, Jedlicze	-	-	no leading industry
Tarnobrzeg	Krosno, Rymanów	31 388 900,00	211	wood and products of wood and cork, except furniture; articles of straw and materials of a kind used for weaving, products of other non-metallic mineral

Mielec	Leżajsk, Leżajsk	-	-	no leading industry
Krakow	Leżajsk, Nowa Sarzyna	1 053 244,38	298	chemicals and chemical products
Mielec	Leżajsk, city of Leżajsk	1 587 000,00	16	fabricated metal products, except machinery and equipment
Mielec	Lubaczów, city of Lubaczów	13 732 030,00	148	machinery and equipment nec
Mielec	Łańcut, city of Łańcut	2 745 814,00	1	fabricated metal products, except machinery and equipment, other products,
Krakow/ Mielec	City of Krosno, city of Krosno	58 965 908,00	354	rubber and plastic products
Tarnobrzeg	City of Przemyśl, city of Przemyśl	11 092 800,00	35	metals, fabricated metal products, except machinery and equipment,
Mielec	City of Rzeszów, city of Rzeszów	73 036 449,00	278	manufacture of other transport equipment
Tarnobrzeg	City of Tarnobrzeg, city of Tarnobrzeg	343 579 400,00	749	products of other non-metallic mineral products
Mielec	Mielec, city of Mielec	3 918 309 095,00	14 127	wood and products of wood and cork, except furniture; articles of straw and materials of a kind used for plaiting
Tarnobrzeg	Nisko, Nisko	62 666 900,00	510	fabricated metal products, except machinery and equipment
Tarnobrzeg	Przemyśl, Orły	1 672 000,00	-	Products of agriculture, hunting and related



				support services
Mielec	Ropczyce-Sędziszów Małopolski, Ostrów	2 430 623,00	1	fabricated metal products, except machinery and equipment
Mielec	Ropczyce-Sędziszów Małopolski , Ropczyce	9 337 614,00	482	manufacture of other transport equipment
Mielec	Ropczyce-Sędziszów Małopolski, Sędziszów Małopolski	-	-	no leading industry
Krakow	Rzeszów, Boguchwała	1 162 442,00	-	machinery and equipment nec
Mielec	Rzeszów, Głogów Małopolski	363 292 765,00	1 916	rubber and plastics, metals,
Mielec	Rzeszów, Trzebownisko	990 547 520,00	1 992	machinery and equipment nec, motor vehicles (excluding motorcycles), trailers and semi-trailers, manufacture of other transport equipment
Mielec	Sanok, Zagórz	78 133 722,00	353	rubber and plastic products, motor vehicles (excluding motorcycles), trailers and semi-trailers,
Mielec	Sanok, city of Sanok	22 699 170,00	197	wood and products of wood and cork, except furniture; articles of straw and materials of a kind used for plaiting

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Tarnobrzeg	Stalowa Wola, city of Stalowa Wola	1 329 229 900,00	4 914	fabricated metal products, except machinery and equipment, machinery and equipment nec, motor vehicles (excluding motorcycles), trailers and semi-trailers
Tarnobrzeg	Tarnobrzeg, Gorzyce	292 906 200,00	2 142	metals
Tarnobrzeg	Tarnobrzeg, Nowa Dęba	350 615 700,00	1 394	basic pharmaceutical products, medicines and other pharmaceutical products

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

**TABLE 5. UNIVERSITIES, FACULTIES AND ITS CATEGORIES**

School name	Category of the Ministry of Science and Higher Education
Bronislaw Markiewicz State Higher College of Technology and Economics in Jaroslaw	no data
State College of Eastern Europe in Przemysl	no data
Jan Grodek State Higher Vocational School in Sanok	no data
Prof. Stanisław Tarnowski State Higher Vocational School in Tarnobrzeg	no data
Stanislaus Pigoń State Higher Vocational School in Krosno	no data
Higher Education School - Bl. Fr. Władysław Findysz in Jaslo	no data
Ignacy Lukaszewicz University of Technology in Rzeszów	A - Faculty of Mathematics and Applied Physics
	B - Civil and Environmental Engineering
	B - Electrical Engineering and Computer Science
	B - Faculty of Chemistry
	B - Faculty of Mechanical Engineering and Aeronautics
	B - Management Department
Polish-Czech College of Business and Sport "Collegium Glacense" in Stalowa Wola	no data
University of Rzeszow	A - Biotechnology Institute of Applied and Basic Sciences
	B - Faculty of Philology
	B - Faculty of Sociology and History
	B - Faculty of Medicine
	B - Faculty of Biology and Agriculture
	B - Faculty of Mathematics and Natural Sciences
	B - Faculty of Pedagogy and Fine Arts
	B - Faculty of Arts
	B - Faculty of Economics

	B - Faculty of Law and Administration
School of Safety in Przemysl	no data
Higher School of Economics in Stalowa Wola	no data
School of Computer Science and Management in Przemysl	no data
University of Information Technology and Management in Rzeszów	B - Faculty of Administration and Social Sciences
	B - Faculty of of Tourism and Health Sciences
	B - Faculty of Economics
	C - Faculty of Applied Informatics
School of Engineering and Economics in Rzeszow	no data
School of Law and Administration in Przemysl	C - School of Law and Administration in Przemysl; Faculty of Law and Administration in Rzeszow
Higher School of Social and Economic in Przeworsk	no data

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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