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INVESTMENT
ATTRACTIVENESS
OF VOIVODSHIPS
AND SUB-REGIONS
OF POLAND 2009



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THE GDAŃSK INSTITUTE FOR MARKET ECONOMICS

**INVESTMENT ATTRACTIVENESS
OF VOIVODSHIPS AND SUB-REGIONS OF POLAND**

2009

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TABLE OF CONTENTS

SUMMARY	5
INTRODUCTION	9
THE OBJECTIVES, SCOPE AND METHODS OF RESEARCH	11
THE OBJECTIVE OF THE REPORT.....	11
THE SCOPE OF RESEARCH.....	11
SOURCE DATA AND THE METHODOLOGY OF RESEARCH	13
FACTORS OF INVESTMENT ATTRACTIVENESS IN THE REGIONAL PERSPECTIVE	15
THE AVAILABILITY OF TRANSPORT	15
LABOUR RESOURCES	16
ABSORPTION CAPACITY OF MARKETS	16
ECONOMIC INFRASTRUCTURE	17
SOCIAL INFRASTRUCTURE	17
THE LEVEL OF ECONOMIC DEVELOPMENT.....	17
THE CONDITION OF THE NATURAL ENVIRONMENT	18
THE LEVEL OF GENERAL SAFETY.....	18
ACTIVITY OF VOIVODSHIPS TOWARDS INVESTORS.	19
INVESTMENT ATTRACTIVENESS OF SUB-REGIONS	21
THE INDUSTRIAL ACTIVITY	21
THE SERVICES SECTOR	27
HIGH TECHNOLOGIES	34
INVESTMENT ATTRACTIVENESS OF VOIVODSHIPS	41
THE SIGNIFICANCE OF INDIVIDUAL LOCATION FACTORS.....	41
THE LABOUR COST AND RESOURCES.....	41
INVESTOR-ORIENTED ACTIVITIES	44
THE AVAILABILITY OF TRANSPORT	45
THE ABSORPTION CAPACITY OF THE MARKET	48
THE ECONOMIC INFRASTRUCTURE.....	50
THE SOCIAL INFRASTRUCTURE.....	52
THE LEVEL OF GENERAL SAFETY.....	53
INVESTMENT ATTRACTIVENESS – A SYNTHETIC PERSPECTIVE.....	55



Summary

This is a 5th report in a series whose aim is to capture differences in investment attractiveness of voivodships and sub-regions. Investment attractiveness (IA) is understood as a capability to attract investment through a combination of business benefits linked to location. The areas that produce an optimum combination of location factors offer the best conditions for business operators and hence attract investment.

As in the earlier reports of 2005-2008, we performed a synthetic assessment of IA of voivodships and an assessment of IA of sub-regions against three criteria: industrial activities, services and advanced technologies. In this context we analysed several dozen variables which form the basis for the assessment of territorial diversification of specific location benefits (factors), including accessibility of transport, cost of labour, quantity and quality of labour resources, absorption capacity of the output market, the level of economic and social infrastructure, the level of economic development and of general safety. Various weights were attributed to these factors depending on the type of business activity.

A higher-than-average investment attractiveness is shown in eight voivodships with the Silesian (śląskie) voivodship as a long-time leader. A high degree of investment attractiveness characterises the Lower Silesian (dolnośląskie) and Mazovian (mazowieckie) voivodships, followed by the Wielkopolskie and Małopolskie voivodships which rank well above the average. Three other regions show an IA level which is slightly above the average: Zachodniopomorskie (Western Pomeranian), Pomorskie (Pomeranian) and Łódzkie. All of the above regions evince high or average ranking against the majority of IA aspects. However, the combination of these benefits can vary.

The highest IA for industrial activities is presented in the southern area of Poland, i.e. Lower and Upper Silesia as well as in the western part of the Małopolska region. These areas are characterised by long-standing industrial traditions and a well-developed production sector. Outside of these areas there are only four sub-regions that show a relatively high level of industrial development and the accessibility of transport, i.e. the sub-regions of Łódź, Poznań, Bydgosz-Toruń and Tarnobrzeg.

Metropolitan sub-regions emerge as the most attractive with respect to investment in services. These are centred around the largest cities of Poland and feature highly absorptive output markets, a very good accessibility of transport, plentiful resources of highly-trained workers and a well-developed economic infrastructure.

Metropolitan sub-regions dominate the group of sub-regions that show the highest level of investment attraction. This is where infrastructure and R&D personnel are concentrated. The labour resources include specialists who originate from the local academic establishments as well as those who are attracted to these areas by high living standards, a well-developed infrastructure and a vibrant cultural life.

Table 1. Investment attractiveness of voivodships in 2009.

	Weight (in percent)	Transport accessibility		Labour market		Market size		Economic infrastr.		Social infrastr.		Public safety		Activities of voivodships		Investment attractiveness of voivodships	
		value	rank	value	rank	value	rank	value	rank	value	rank	value	rank	value	rank	value	rank
1	Śląskie	0,37	6	1,41	1	1,35	2	1,45	1	2,18	1	-1,11	16	0,23	5	0,87	1
2	Dolnośląskie	0,45	4	0,04	6	0,62	4	1,01	2	0,93	3	-0,99	15	1,99	1	0,69	2
3	Mazowieckie	0,47	3	-0,26	12	1,67	1	0,69	3	0,32	4	-0,45	11	1,32	3	0,60	3
4	Wielkopolskie	0,52	1	0,13	4	-0,10	9	0,35	4	-0,51	10	0,40	6	1,42	2	0,43	4
5	Małopolskie	0,24	8	0,47	2	0,56	5	0,17	5	1,74	2	-0,13	9	-0,13	7	0,32	5
6	Zachodniopomorskie	0,43	5	-0,17	9	0,03	8	-0,34	11	0,01	6	-0,50	13	0,42	4	0,07	6
7	Pomorskie	-0,15	11	-0,19	10	0,8	3	-0,14	7	0,10	5	-0,98	14	0,20	6	0,02	7
8	Łódzkie	0,23	9	0,22	3	-0,11	10	0,01	6	-0,24	7	-0,29	10	-0,21	8	0,02	8
9	Lubuskie	0,49	2	-0,2	11	0,04	7	-0,21	9	-0,25	9	-0,50	12	-0,53	11	-0,11	9
10	Opolskie	0,27	7	-0,27	13	0,06	6	-0,15	8	-0,64	14	0,30	7	-0,38	10	-0,11	10
11	Kujawsko-Pomorskie	0,08	10	0,04	5	-0,38	11	-0,51	14	-0,24	8	-0,06	8	-0,64	13	-0,22	11
12	Warmińsko-Mazurskie	-0,5	13	-0,29	14	-0,65	13	-0,43	13	-0,52	11	0,47	5	-0,32	9	-0,38	12
13	Podkarpackie	-0,67	14	-0,02	7	-1,00	14	-0,26	10	-0,62	13	1,48	1	-0,56	12	-0,38	13
14	Świętokrzyskie	-0,26	12	-0,1	8	-1,25	16	-0,69	16	-0,61	12	0,79	3	-1,18	16	-0,56	14
15	Podlaskie	-1,18	16	-0,47	16	-0,53	12	-0,41	12	-0,69	15	0,85	2	-0,77	14	-0,62	15
16	Lubelskie	-0,78	15	-0,34	15	-1,1	15	-0,52	15	-0,98	16	0,72	4	-0,88	15	-0,65	16

Source: GIME research.



Introduction

The Gdańsk Institute for Market Economics (GIME) has continued to analyze the territorial diversification of foreign investment attractiveness of Poland. Thus far our research has produced four editions of the report entitled 'Investment attractiveness of voivodships and sub-regions of Poland.'

As before our overriding objective in this 5th edition of the report is to portray, with a maximum of precision, a time-graded territorial diversification of investment attractiveness (IA) in Poland. To this end we need to modify some of our research methods, and in particular the choice of indices and weights, due to the evolution of investor preferences and socio-economic changes in the voivodships. In order to maintain the comparability of results in the successive reports we assumed to restrict the modification of research methods to the degree that would make it possible to analyse changes in the synthetic IA indices between the years.

As in the earlier reports of 2005-2008, we performed a synthetic assessment of IA of voivodships and an assessment of IA of sub-regions against three criteria:

- ◆ industrial activities
- ◆ services
- ◆ advanced technologies.

Based on the aforementioned assumptions and our research methodology it is possible to trace changes in the territorial diversification of foreign investment attractiveness of the Polish voivodships. These are further reflected in the IA rating lists compiled for the years 2005-2009. Regrettably, current results can only be compared to those of the previous year due to a significant change in the number of sub-regions and their territorial delimitation which took place in the early 2008. On the other hand the picture of investment attractiveness obtained for the new layout of sub-regions seems to better reflect the real functional and territorial structure of Poland.

This research has been carried out by a team of GIME authors. The publication of this report and the conference promoting its results were made possible owing to the co-operation between GIME and the Konrad Adenauer Foundation. The authors wish to express their heartfelt gratitude to Director Stephan Raabe and Mr Falk Altenberger of the Konrad Adenauer Foundation for their support.



The objectives, scope and methods of research

The objective of the report

This report aims to:

- ◆ identify territorial differences in the level of investment attractiveness and to grade voivodships and sub-regions in this respect;
- ◆ indicate strong and weak points of individual territorial units in terms of IA factors;
- ◆ analyse changes in the investment attractiveness of voivodships and sub-regions.

The scope of research

The substantive scope of the report follows from the notion of investment attractiveness. IA is understood as a capability to attract investment through a combination of business benefits linked to location. These benefits stem from the specific features of the area in which business activity is developed and are referred to as location factors. Therefore a set of location factors determines the investment attractiveness of a given area. The areas that offer an optimum combination of location factors attract investment. They make it possible to reduce investment expenditures and the current costs of business while enabling the maximisation of profit and reducing the risk of business failure.

Business activities come in all shapes and forms which leads to diverse location preferences. Consequently, there is no investment attraction of an area in the absolute sense. Our assessment of investment attractiveness is therefore a two-track process:

- ◆ with respect to sub-regions we discuss location factors concerning the three most important types of economic activity i.e. the industry, services and advanced technologies;
- ◆ with respect to voivodships the universal location factors are discussed.



The substantive scope of the report is conditioned by:

- ◆ the necessity to apply a wide range indicators that describe, as precisely as possible, the individual location factors;
- ◆ the necessity to select different weights for the individual location factors to highlight varying importance of these factors for the location of diverse business activities.

In this context we analysed several dozen variables which form the basis for the assessment of territorial diversification of specific location benefits (factors), including accessibility of transport, cost of labour, quantity and quality of labour resources, absorption capacity of the output market, the level of economic and social infrastructure, the level of economic development and of general safety. Various weights were attributed to these factors depending on the type of business activity

Table 2. Factors and their significance with respect to investment attractiveness of sub-regions and voivodships

	Sub-regions			voivodships
	Industry	Services	Advanced technologies	
Factors	Weights (in %)			
Availability of transport	20	10	20	20
Cost of labour	15	15		25
Quantity & quality of labour resources	40	25	30	
Absorption capacity of output market		20	10	15
Level of economic infrastructure	15	10	10	10
Level of social infrastructure			10	5
Level of economic development	2	5	5	
Level of protection and the condition of natural environment	5	7	7	
Level of general safety	3	8	8	5
Activities of regions towards investors				20
Total	100	100	100	100

Source: GIME research.



The territorial scope of the report covers the entire area of Poland and subdivides into:

- ◆ 16 voivodships;
- ◆ 54 sub-regions (formally, there are 66 sub-regions but for the purposes of the report large cities that constitute sub-regions, including Katowice, Cracow, Łódź, Poznań, Szczecin, Tri-City (Gdańsk, Gdynia, Sopot) and Wrocław were grouped together with their respective surrounding areas with which they are functionally linked).

The availability of data weighs heavily on the time horizon of the report as different categories of recent data are released with a varying degree of time-lag. Therefore the temporal structure of data used in the report is as follows :

- ◆ 2007: composition and volumes of added value and investment outlays;
- ◆ 2008: the majority of indicators from public statistical sources;
- ◆ 2009 chiefly, availability of transport, activities towards investors, the land available in special economic zones.

Source data and the methodology of research

The report relied on the quantitative data obtained primarily from the public statistical sources and was complemented by other data. The key sources of information were:

- ◆ Regional Data Bank of the Main Statistical Office;
- ◆ Polish Agency for Information and Foreign Investment (PAIiIZ);
- ◆ Managers of special economic zones;
- ◆ Departments of Trade and Investment Promotion at the Polish embassies in the countries with the highest share of foreign investment in Poland.

The principal methodology of IA assessment remained unchanged and consisted in the pseudo-monovariate procedure of classification. This approach effectively means that the assessment of investment attraction is relative. The point of reference is an average value for the set of voivodships or sub-regions.

Changes to the set of indicators have been limited to minor technicalities in this edition of the report. The methodology which was developed earlier on in our research relies on the sources of data now available. No new possibilities have become available in this respect. The global economic crisis now underway no doubt poses a challenge to research on investment attractiveness. At this stage it is too early to draw conclusions that would be relevant on the regional level. The only significant change was to return in our assessment of the activities of the voivodships, as we'd done in the past, to information obtained from the Polish Agency for Information and Foreign Investment and the Polish embassies.



Factors of investment attractiveness in the regional perspective

The availability of transport

The availability of transport is significant in the following respects

- ◆ it enables the supply of raw materials necessary in production and reduces supply costs
- ◆ it enables the supply of final goods to consumers and reduces supply costs
- ◆ it enables passenger traffic and provides for direct meetings between suppliers, collaborators, customers and advisers.

The assessment of transport accessibility requires a point of reference against which it is defined. The following benchmarks were adopted for the purposes of IA assessment:

- ◆ location in relation to the western border
- ◆ location of voivodships and sub-regions in relation to Warsaw
- ◆ location in relation to regional centres
- ◆ location with respect to international airports (sub-regions), with consideration to their importance (voivodshipss)
- ◆ location in relation to major maritime ports (Szczecin, Tri-City).

The above criteria were adopted with consideration to the structure of the Polish foreign trade, the role of the capital city and regional capitals as economic centres, output markets and transport hubs.

The significance of transport accessibility components varies according to the type of business activity. For example, accessibility by road transport as well as a general level of transport and logistics sector are vital to industrial activities whereas airports are important to hi-tech business.



Labour resources

Workforce impacts investment attractiveness as it enables business operators to:

- ◆ recruit an adequate number of employees;
- ◆ recruit employees of adequate professional skills and experience;
- ◆ recruit employees of adequate attitudes (reliable, responsible, honest, entrepreneurial);
- ◆ optimise labour costs to provide for profitability of investment.

In our assessment of labour resources in voivodships and sub-regions the following factors were taken into account:

- ◆ the number of employed persons
- ◆ the number of unemployed persons
- ◆ the number of vacancies
- ◆ the influx of secondary and tertiary schools graduates
- ◆ the level of remuneration.

In this context it is possible to obtain both a quantitative and qualitative assessment of labour resources. The production sector tends to employ graduates of the vocational schools while the services sector relies to a greater extent on persons with secondary and tertiary education.

Absorption capacity of markets

The absorption capacity of markets influences IA by enabling prospective investors to sell their goods or services on the regional market. The higher the absorption capacity the greater benefits of scale can be obtained and the sooner investment outlays can be recovered. A high absorption capacity of the regional market can reduce the final cost of goods through a reduced cost of transport.

In order to assess IA the following components of market absorption were factored in:

- ◆ size of output market
- ◆ wealth of households
- ◆ investment outlays of business operators
- ◆ investment outlays of other institutions.

The significance of market absorption varies according to the type of business. This factor tends to be less important in the industrial activity whose products are distributed in many markets. The services which are typically sold on the local market and which require a direct contact with customers attach a much higher importance to the absorption capacity of the regional market.



Economic infrastructure

The impact of the economic infrastructure on the level of IA is shown in facilitating investment process and the operation of the investment project. The following components of infrastructure were factored in the IA analysis::

- ◆ the density of institutions in business environment
- ◆ the presence of R&D centres
- ◆ the number of fairs and exhibitions
- ◆ the operation of special economic zones.

These factors can play different roles in the location of business activities. The land available for investment projects will be vital to the production activities in the special economic zones. Hi-tech business will in turn look for the proximity of R&D establishments.

Social infrastructure

The social infrastructure influences IA in the indirect ways.

- ◆ it creates beneficial conditions of life, attracts immigrants which enhances the quantity and the quality of labour resources,
- ◆ it creates a climate of openness which favours creativity and innovation,
- ◆ it facilitates the organization of training courses and meetings with clients.

The following components of the social infrastructure were taken into account:

- ◆ the number and the activity of cultural establishments such as theatres, cinemas, culture/creativity centres,
- ◆ the density of the hotel and catering infrastructure.

The social infrastructure is important for the services sector, and in particular the hi-tech services, which depend on the availability of high-quality human capital and a social climate that favours innovation.

The level of economic development

The level of economic structure and development bears on IA as it shapes the technical environment which may be required by the investor. It makes it possible for the investor to obtain the services and supplies which may be required and provides for an optimum operation of the investment project.



The following factors linked to the level of economic development have been taken into account:

- ◆ productivity of labour
- ◆ the share of non-agricultural activity in the economy
- ◆ the presence of companies with foreign capital participation.

The condition of the natural environment

The condition of the natural environment has a two-fold effect on IA:

- ◆ the presence of a highly valuable natural environment protected by law is a serious impediment to the placement of an investment project,
- ◆ a high level of pollution generates financial costs of business as it requires the implementation of recycling installations, causes an increased absence of employees due to sickness and in extreme cases it may lead to the accelerated wear of fixed assets (e.g. through corrosion),
- ◆ a high level of pollution decreases the standards of living and bears negatively on the quantity and quality of labour resources.

The following environmental factors have been taken into account:

- ◆ the size of areas protected by law;
- ◆ the level of air pollution;
- ◆ emissions to the surface and underground waters.

The condition of the natural environment may have diverse effects on the location of different types of business. As regards the industrial activity the presence of protected areas will limit the possibility of locating an investment project. A sound natural environment will favour investment in services or high technologies.

The level of general safety

The level of general safety translates into the financial performance of an investment project in a limited degree. A low level of general safety leads to the increased cost of protecting the property and the employees. The role of this factor in shaping IA applies to a greater extent to a perception of personal safety and the responsibility for the fellow employees or business partners. In addition, a low level of general safety

- ◆ may reduce the quantity and the quality of labour resources due to migrations caused by the deteriorating standards of living;
- ◆ testifies to a deficit of the social capital which, in turn, may impede the investment process and the operation of the project;
- ◆ signals social pathologies or inadequate public governance.



The following aspects of general safety have been factored in our assessment:

- ◆ the level and the structure of criminality
- ◆ the crime detection rate.

The level of general safety is slightly more significant for the investment in services and advanced technologies which are more dependent on the quality of labour resources.

Activity of voivodships towards investors

The activity towards investors is understood as the ability of the voivodship authorities to build and promote the image of the region as well as to create an investment-friendly climate. This is the least measurable of all the factors and it is therefore not easy to analyse. In fact, the analysis can capture only a small fragment of the wide range of marketing activities performed by the administration. The local and regional authorities apply diverse tools and strategies in this respect which makes them difficult to compare. With this reservation in mind, the following aspects of investor-oriented activities were included in our study:

- ◆ a number of investment offers in the data base of the Polish Agency for Information and Foreign Investment;
- ◆ the information and promotional activities targeting foreign investors in their country of origin co-performed by the voivodship authorities and the Polish diplomatic establishments abroad, i.e. the Departments for the Promotion of Trade and Investment at the Polish Embassies,

These variables are not free from some shortcomings (i.e. regional authorities may differ in the degree to which they use such promotional activities) but they have one major benefit in that they present a relatively consistent system of data collection which enables comparability. The case of activities of the voivodship authorities towards investors exemplifies an important rule, i.e. the results of the study reflect investment attractiveness measured by means of a specific set of indicators and can be interpreted only in the framework of these variables.



Investment attractiveness of sub-regions

The industrial activity

The importance of individual location factors

The investment attractiveness of sub-regions is shaped by seven groups of component indicators. Four of these directly influence the cost of production which is a key parameter determining the location of business. This category of indicators includes

- ◆ the quantity of labour resources
- ◆ the availability of transport
- ◆ the cost of labour
- ◆ the level of economic infrastructure.

The impact of the three remaining groups of indicators is indirect in nature and concerns, for example, the possibilities of co-operation or limited location opportunities due to a legal protection of the area. A possible conflict related to the use of natural resources in the proximity of the protected areas may tarnish the image of the investor. However, it is difficult to quantify the financial impact of such incidents as a cost of production. Such indirect factors of IA include:

- ◆ the level of protection of the natural environment;
- ◆ the level of general safety;
- ◆ the level of economic development.

A spatial diversification of investment attractiveness

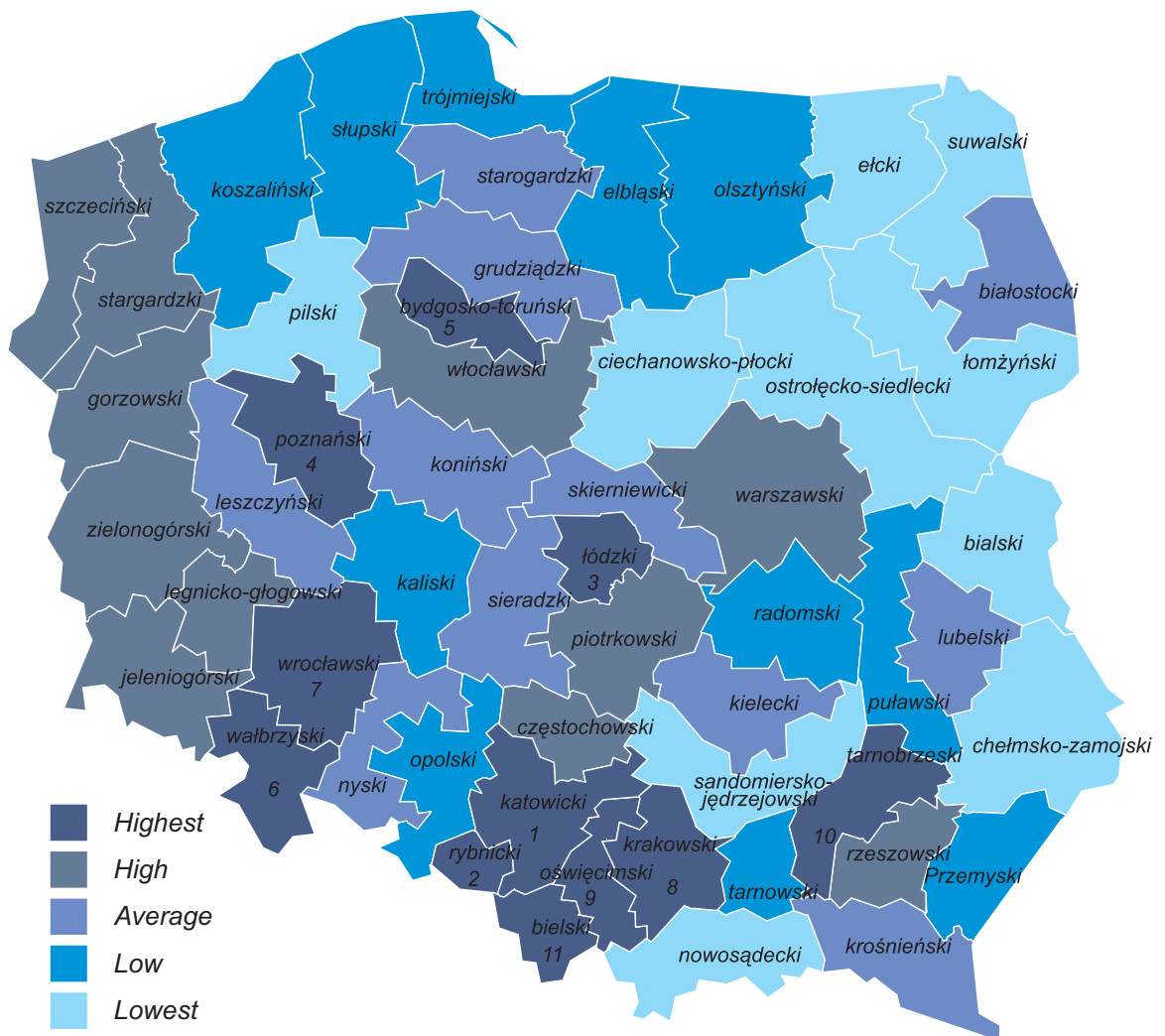
The aforementioned criteria were used to assign individual sub-regions to one of five equinumerous classes (of 11 elements with the exception of the last class of 10 elements) of investment attraction.



Among the most attractive sub-regions are two compact areas in the South of Poland. One of them is located around Upper Silesia (Górny Śląsk) and the western part of Małopolska whereas the second one is found around the industrial cities of Wrocław and Wałbrzych in Lower Silesia (Dolny Śląsk). These areas are characterised by long-standing industrial traditions and a well-developed production sector, a specialised labour market and a relatively high availability of transport owing to the A-4 motorway. There are only four sub-regions outside of this area that evince a relatively high level of industrialisation and a good availability of transport, i.e. the sub-regions of Łódź, Poznań, Bydgoszcz-Toruń and Tarnobrzeg.

At the bottom of the IA rating list there are ten sub-regions characterized by a low level of industrializations. They show a relatively low availability of transport and limited resources of qualified workforce. Some of the may benefit from low labour costs and the presence of the special economic zones.

Map 1. Sub-regional investment attractiveness with respect to industrial activities in 2009



Source: GIME research.

There has been a change in the four top-scoring sub-regions compared to 2008. The Bydgoszcz-Toruń sub-region was promoted from the 7th to the 5th place which was primarily due to improved



transport accessibility in relation to the ports of Tri-City, a relative limitation of labour costs and an upgraded economic infrastructure. The Wałbrzych sub-region move up three rungs which is due to improved labour resources and a relative limitation of labour costs. Also the economic infrastructure was upgraded.

The sub-region of Wrocław showed increased IA with respect to industrial activities due to increased labour resources and an upgraded economic infrastructure. For the same reasons the sub-region of Cracow moved up to the group of IA top-scorers.

Table 3. Sub-regional investment attractiveness with respect to industrial activities between 2008 and 2009

Sub-region	Ranking in 2009	Ranking in 2008
katowicki	1	1
rybnicki	2	2
łódzki	3	3
poznański	4	4
bydgosko-toruński	5	7
wałbrzyski	6	9
wrocławski	7	11
krakowski	8	14
oświęcimski	9	8
tarnobrzeski	10	5
bielski	11	6

Source: GIME research.

The most attractive sub-regions

Despite some features in common each sub-region is characterized by a slightly different make-up of attraction factors. Below are the characteristics - both strong and weak points – of the IA top-scorers with regard to the industrial activity.

Table 4. Investment attractiveness with respect to industrial activity – strong and weak points of the Katowice sub-region in 2009

Factors	Characteristics
Strengths	
Labour resources	Many qualified employees, graduates and the unemployed
Transport accessibility	Major transport node, high density of road infrastructure, higher-than-average access to western border, well-developed transport&logistics sector



Factors	Characteristics
Economic Infrastructure	Extensive land available in Special Economic Zone, high investor activity in SEZ
Protection of natural environment	Low share of protected areas
Weaknesses	
Cost of labour	High remuneration
Level of general safety	High level of criminality, low detection rate

Source: GIME research.

Table 5. Investment attractiveness with respect to industrial activity – strong and weak points of the Rybnik sub-region in 2009

Factors	Characteristics
Strengths	
Labour resources	High number of qualified employees, graduates and the unemployed
Economic Infrastructure	Attractive land available in Special Economic Zone, (high investor activity)
Level of economic development	Beneficial structure of the economy
Weaknesses	
Cost of labour	High remuneration

Source: GIME research.

Table 6. Investment attractiveness with respect to industrial activity – strong and weak points of the Łódź sub-region in 2009

Factors	Characteristics
Strengths	
Labour resources	High number of qualified workers and the unemployed, higher-than-average number of graduates
Level of economic development	Many enterprises with foreign participation, beneficial structure of the economy
Weaknesses	
Level of general safety	High level of criminality, low detection rate

Source: GIME research.

Table 7. Investment attractiveness with respect to industrial activity – strong and weak points of the Poznań sub-region in 2009

Factors	Characteristics
Strengths	
Labour resources	Sizeable resources of qualified workforce



Factors	Characteristics
Transport accessibility	Higher-than-average access to western border, major transport node
Economic Infrastructure	Sizeable land available in SEZ
Protection of natural environment	Low share of protected areas
Level of economic development	High labour productivity, many enterprises with foreign participation, beneficial structure of the economy
Weaknesses	
Cost of labour	High cost of labour
Level of general safety	High level of criminality, low detection rate

Source: GIME research.

Table 8. Investment attractiveness with respect to industrial activity – strong and weak points of the Bydgoszcz-Toruń sub-region in 2009

Factors	Characteristics
Strengths	
Labour resources	Many qualified workers and the unemployed, higher-than-average number of secondary school leavers
Transport accessibility	Proximity to a major sea port, well-developed sector of transport and logistics
Weaknesses	
Cost of labour	Higher-than-average remuneration, relatively low unemployment rate conducive to growth of labour costs
Economic Infrastructure	Limited land available for investment in SEZ, relatively low investor interest in SEZ land
Level of general safety	High level of criminality, low detection rate

Source: GIME research.

Table 9. Investment attractiveness with respect to industrial activity – strong and weak points of the Wałbrzych sub-region in 2009

Factors	Characteristics
Strengths	
Cost of labour	About average which is an asset in the highly attractive areas
Economic Infrastructure	Relatively large area available in SEZ
Labour resources	High supply of labour
Weaknesses	
Level of general safety	Relatively low crime detection

Source: GIME research.



Table 10. Investment attractiveness with respect to industrial activity – strong and weak points of the Wrocław sub-region in 2009

Factors	Characteristics
Strengths	
Labour resources	Higher-than-average resources of very highly qualified employees
Transport accessibility	Proximity of western border, major transport node
Economic Infrastructure	Sizeable areas available in SEZ
Protection of natural environment	Low percentage of protected land
Level of economic development	Relatively modern structure of the economy, high number of enterprises with foreign participation
Weaknesses	
Cost of labour	High wages and low unemployment rate which may lead to remuneration growth
Level of general safety	High level of criminality, low detection rate

Source: GIME research.

Table 11. Investment attractiveness with respect to industrial activity – strong and weak points of the Cracow sub-region in 2009

Factors	Characteristics
Strengths	
Labour resources	Sizeable resources of qualified employees and graduates
Transport accessibility	Supra-regional transport node, a well-developed transport and logistics sector
Level of economic development	High number of enterprises with foreign participation, high productivity of labour in industry, a beneficial structure of the economy
Weaknesses	
Cost of labour	High wages
Level of general safety	Low rate of crime detection

Source: GIME research.

Table 12. Investment attractiveness with respect to industrial activity – strong and weak points of the Oświęcim sub-region in 2009

Factors	Characteristics
Strengths	
Labour resources	Higher-than-average number of employees, high number of graduates
Weaknesses	
Economic Infrastructure	Limited land resources available in SEZ

Source: GIME research.



Table 13. Investment attractiveness with respect to industrial activity – strong and weak points of the Tarnobrzeg sub-region in 2009

Factors	Characteristics
Strengths	
Labour resources	Low deficit of qualified employees, higher-than-average number of graduates
Economic Infrastructure	Plentiful land available in SEZ, high investor activity in SEZ
Protection of natural environment	A very low percentage of protected land
Level of general safety	A relatively low crime rate, higher-than-average detection rate
Weaknesses	
Transport accessibility	Long distance to sea ports and western border

Source: GIME research.

Table 14. Investment attractiveness with respect to industrial activity – strong and weak points of the Bielsko sub-region in 2009

Factors	Characteristics
Strengths	
Labour resources	High number of qualified staff and graduates
Level of economic development	Advantageous structure of the economy, higher-than-average number of enterprises with foreign participation
Weaknesses	
Cost of labour	Higher-than-average cost of labour
Economic Infrastructure	Limited land available in SEZ

Source: GIME research.

The services sector

The significance of individual location factors

There are eight groups of component indicators that characterize IA with respect to services. The following are factor groups that are considered significant and quantifiable with the respect to their impact on the cost of services:

- ◆ the size and the quality of labour resources
- ◆ the absorption capacity of the institutional market
- ◆ the cost of labour
- ◆ the availability of transport
- ◆ the level of economic infrastructure



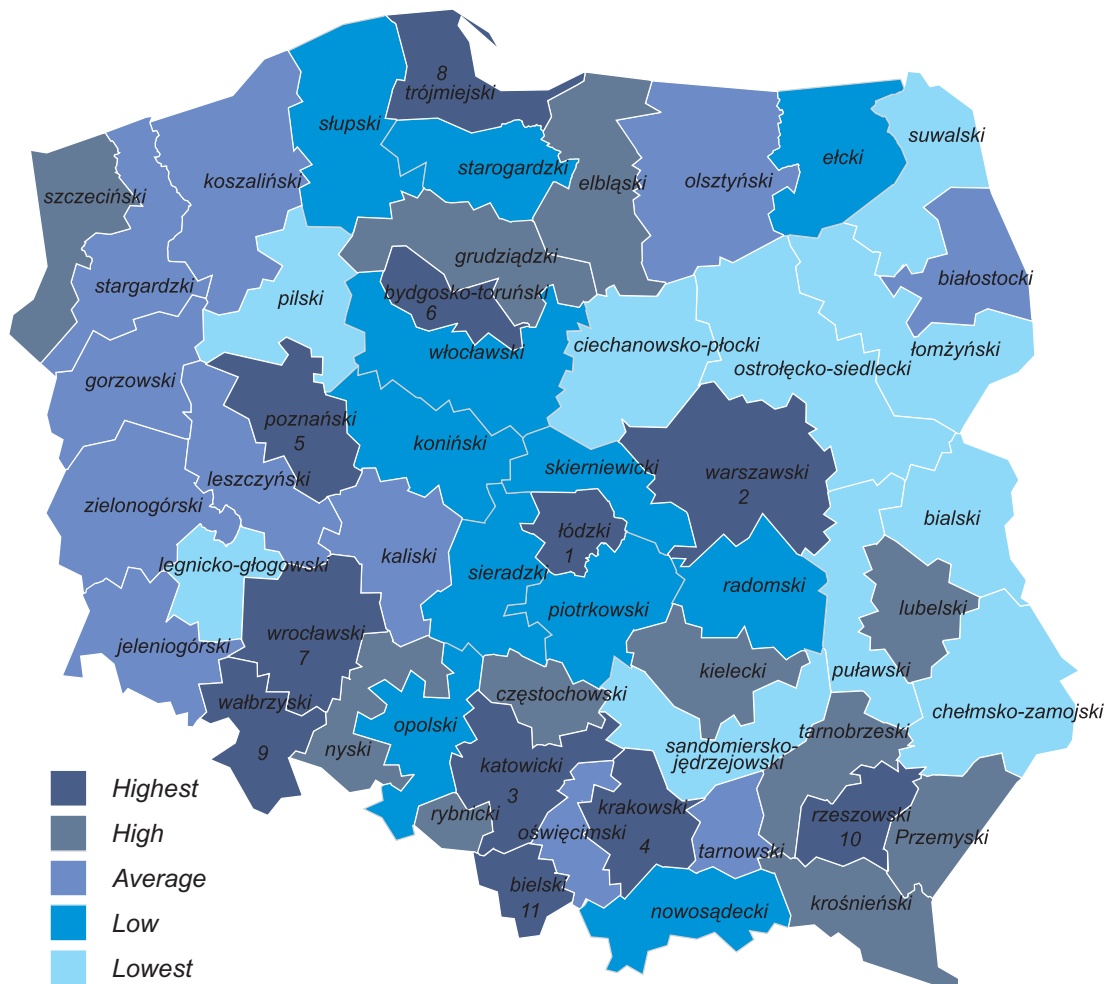
The remaining factors exert an indirect influence:

- ◆ the level of economic development
- ◆ the level of general safety
- ◆ the level of protection of the natural environment

A spatial diversification of investment attractiveness

The aforementioned criteria were used to assign individual sub-regions to one of five equinumerous classes (of 11 elements with the exception of the last class of 10 elements) of investment attraction.

Map 2. Sub-regional investment attractiveness with respect to services in 2009



Source: GIME research.

Metropolitan sub-regions emerge as the most attractive for investment. These are centred around the biggest cities in Poland and feature sizeable workforce of high qualifications and diverse competencies as well as a large and highly absorptive output markets. In addition the biggest cities offer a very high availability of transport and a well-developed economic infrastructure.



The least attractive for investment in services are sub-regions which are deprived of major cities, feature a high share of agriculture in the economy, low internal demand and a limited availability of transport. These factors create a demand barrier which impedes the expansion of services, in particular those of a higher order (finance, insurance, advisory services for enterprises, real estate). Some of these sub-regions are characterized by a high level of specialization in industrial production.

Table 15. Sub-regional investment attractiveness for services 2008-2009

Sub-region	Ranking in 2009	Ranking in 2008
łódzki	1	1
warszawski	2	2
katowicki	3	3
krakowski	4	4
poznański	5	5
bydgosko-toruński	6	7
wrocławski	7	6
trójmiejski	8	8
wałbrzyski	9	11
rzeszowski	10	9
bielski	11	10

Source: GIME research.

The most attractive sub-regions

In addition to common features discussed earlier in this study, each of the sub-regions shows a slightly different attraction profile. The tables below present strong and weak points of the most attractive sub-regions with respect to services.

Table 16. Investment attractiveness with respect to services – strong and weak points of the Łódź sub-region in 2009

Factors	Characteristics
Strengths	
Quantity and quality of labour resources	High number of qualified staff and tertiary schools graduates, high level of economic activity
Market absorption	High demand generated by enterprises
Transport accessibility	Supra-regional transport node with access to international airport, A-1 and A-2 motorway hub in the pipeline, advantageous location in relation to Warsaw – key transport node



Factors	Characteristics
Level of economic development	High density of enterprises with foreign participation, beneficial structure of the economy
Weaknesses	
Level of general safety	High level of criminality, low detection rate

Source: GIME research.

Table 17. Investment attractiveness with respect to services – strong and weak points of the Warsaw sub-region in 2009

Factors	Characteristics
Strengths	
Quantity and quality of labour resources	Quantity and quality of labour resources High number of qualified staff and tertiary schools graduates, high level of entrepreneurship and of social activity
Market absorption	A very high purchasing power of households and enterprises
Transport accessibility	International airport of primary importance, key transport hub
Economic Infrastructure	Very well developed business environment
Level of economic development	Very high labour productivity, advantageous structure of the economy, high number of enterprises with foreign capital participation
Weaknesses	
Cost of labour	Very high wages
Level of general safety	Low crime detection

Source: GIME research.

Table 18. Investment attractiveness with respect to services – strong and weak points of the Katowice sub-region in 2009

Factors	Characteristics
Strengths	
Quantity and quality of labour resources	High number of qualified staff, secondary school leavers, and college students
Market absorption	A very high purchasing power of households and enterprises
Transport accessibility	Very high density of roads, important transport node of supra-regional importance, a major airport
Economic Infrastructure	Plentiful land available for investment in SEZ, high investor activity in SEZ
Level of economic development	High number of enterprises with foreign participation, beneficial structure of the economy
Weaknesses	
Cost of labour	High wages
Level of general safety	High level of criminality, low detection rate
Quality of natural environment	High pollution, low percentage of protected area

Source: GIME research.



Table 19. Investment attractiveness with respect to services – strong and weak points of the Cracow sub-region in 2009

Factors	Characteristics
Strengths	
Quantity and quality of labour resources	High number of qualified staff and of graduates, higher-than-average level of entrepreneurship and a high level of social activity
Market absorption	High purchasing power of households and enterprises
Transport accessibility	High density of local roads, a transport node of supra-regional importance
Economic Infrastructure	High level of business environment and infrastructure, higher-than-average availability of land in SEZ
Weaknesses	
Cost of labour	Higher-than-average wages
Level of general safety	Low crime detection

Source: GIME research.

Table 20. Investment attractiveness with respect to services – strong and weak points of the Poznań sub-region in 2009

Factors	Characteristics
Strengths	
Quantity and quality of labour resources	High number of qualified staff and college graduates, high level of entrepreneurship and social activity
Market absorption	High purchasing power of households and enterprises
Transport accessibility	Proximity of western border, transport node of supra-regional importance
Economic Infrastructure	Well-developed business environment, high percentage of land available for investment in SEZ
Level of economic development	High number of enterprises with foreign capital, high level of labour productivity in services
Weaknesses	
Cost of labour	Very high wages
Level of general safety	High level of criminality, low detection rate

Source: GIME research.

Table 21. Investment attractiveness with respect to services – strong and weak points of the Bydgosz-Toruń sub-region in 2009

Factors	Characteristics
Strengths	
Quantity and quality of labour resources	High number of qualified staff, high supply of students and graduates, high economic activity



Factors	Characteristics
Market absorption	High purchasing power of enterprises
Transport accessibility	Airport with international connections, transport node of supra-regional importance
Level of economic development	Advantageous structure of the economy
Weaknesses	
Level of general safety	High level of criminality, low detection rate

Source: GIME research.

Table 22. Investment attractiveness with respect to services – strong and weak points of the Wrocław sub-region in 2009

Factors	Characteristics
Strengths	
Quantity and quality of labour resources	High number of students, high level of economic and social activity
Market absorption	Strong purchasing power of enterprises
Transport accessibility	Proximity of western border, transport node of international importance
Economic Infrastructure	High level of business environment, high percentage of land available for investment in SEZ
Weaknesses	
Cost of labour	High wages
Level of general safety	High level of criminality, low detection rate

Source: GIME research.

Table 23. Investment attractiveness with respect to services – strong and weak points of the Tri-City sub-region in 2009

Factors	Characteristics
Strengths	
Quantity and quality of labour resources	High supply of employees and students, high economic activity
Market absorption	High purchasing power of enterprises and households
Transport accessibility	Transport node of supra-regional importance with access to international airport and seaport
Economic Infrastructure	High density of business environment
Quality of natural environment	High percentage of population served by waste water treatment plants, higher-than –average percentage of protected land
Level of economic development	High labour productivity, high density of enterprises with foreign capital, beneficial structure of the economy



Factors	Characteristics
Weaknesses	
Cost of labour	High wages
Level of general safety	High level of criminality, low detection rate

Source: GIME research.

Table 24. Investment attractiveness with respect to services – strong and weak points of the Wałbrzych sub-region in 2009

Factors	Characteristics
Strengths	
Economic Infrastructure	High density of business environment, extensive land available in SEZ
Level of economic development	High productivity of labour

Source: GIME research.

Table 25. Investment attractiveness with respect to services – strong and weak points of the Rzeszów sub-region in 2009

Factors	Characteristics
Strengths	
Quantity and quality of labour resources	High supply of labour due to unemployment, number of students above average
Transport accessibility	Domestic transport node with access to international airport
Level of general safety	Low crime rate

Source: GIME research.

Table 26. Investment attractiveness with respect to services – strong and weak points of the Bielsko-Biała sub-region in 2009

Factors	Characteristics
Strengths	
Quantity and quality of labour resources	Employment in services above average, high supply of secondary schools graduates
Market absorption	Purchasing power of households and enterprises above average
Level of economic development	Beneficial structure of the economy

Source: GIME research.



High technologies

The significance of individual location factors

The level of investment attractiveness for advanced technologies is conditioned by eight groups of factors. Four of them have a direct impact on the cost of business. These include:

- ◆ availability of transport
- ◆ market absorption
- ◆ quality of labour resources
- ◆ economic infrastructure.

An indirect impact is exerted by the following groups of factors:

- ◆ the level of economic development
- ◆ the quality of natural environment
- ◆ the level of general safety.

Spatial diversification of investment attractiveness

The aforementioned criteria were used to assign individual sub-regions to one of five equinumerous classes (of 11 elements with the exception of the last class of 10 elements) of investment attraction.

Metropolitan sub-regions emerge as the most attractive for investment. This is where infrastructure and R&D personnel are concentrated. The workforce includes specialists educated in the local academic centres as well as those who are attracted by good standards of living and a well-developed cultural environment.

Table 27. Sub-regional attractiveness with respect to advanced technologies 2008-2009

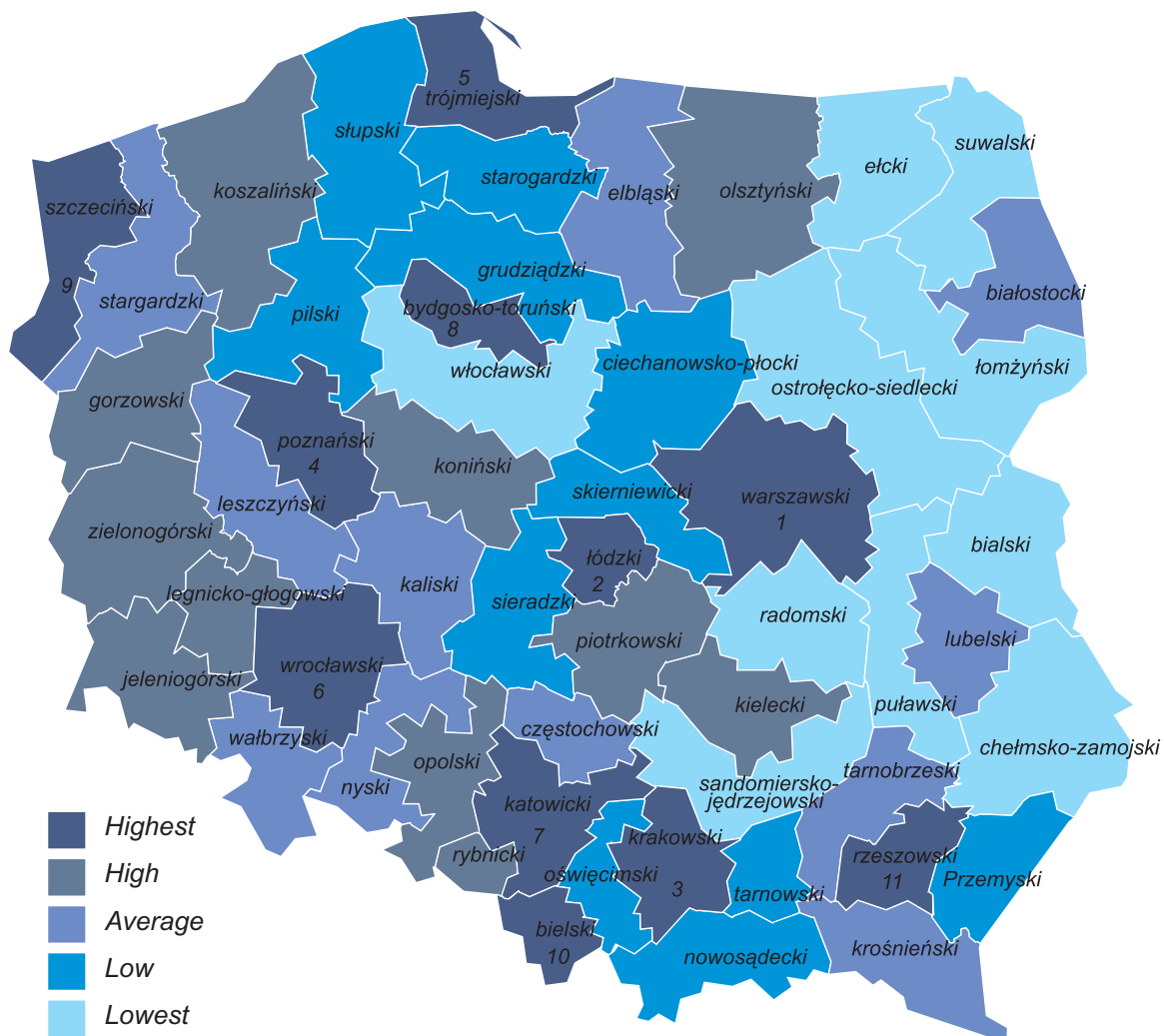
Sub-region	Ranking in 2009	Ranking in 2008
warszawski	1	1
łódzki	2	2
krakowski	3	3
poznański	4	4
trójmiejski	5	6
wrocławski	6	5
katowicki	7	7
bydgosko-toruński	8	8



Sub-region	Ranking in 2009	Ranking in 2008
szczeciński	9	9
bielski	10	10
rzeszowski	11	13

Source: GIME research.

Map 3. Sub-regional attractiveness with respect to advanced technologies in 2009



Source: GIME research.

The lowest IA is typical of the sub-regions located around minor urban centres. In Poland the vast majority of towns of medium size and some cities (except for the biggest ones) are not able to create conditions that would attract hi-tech investors. This is due not only to a deficit of the production factors but to the unfavourable conditions of the social and economic infrastructure. This is particularly true for towns located in the areas characterised by a low level of urban development. An exception to this rule is presented by centres which host highly specialized production of large scale and where additional benefits are offered, e.g. investment preferences in the special economic zones.



Compared to 2008 there have been important changes at top on the IA ranking list with respect to services. The Tri-City went up one rung at the expense of the Wrocław sub-region. This was due to an improved transport accessibility and the absorption capacity of the market. The Rzeszów sub-region joined the IA top-scorers from the previous 13 ranking which was effected by a relative improvement of labour resources and the level of natural environment.

The most attractive sub-regions

Despite some shared characteristics each of the sub-regions exhibits a slightly different attraction profile. The tables below present strong and weak points of the most attractive sub-regions with respect to advanced technologies.

Table 28. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Warsaw sub-region in 2009

Factors	Characteristics
Strengths	
Quality of labour resources	High number of college graduates, economic and social activities the highest among sub-regions, sound health situation
Transport accessibility	Transport node of supra-regional importance with access to international airport
Market absorption	Purchasing power of households and enterprises the highest among sub-regions
Social infrastructure	Highly developed cultural infrastructure, high spending on local public infrastructure
Economic Infrastructure	High density of business environment
Level of economic development	High productivity of labour advantageous structure of the economy
Weaknesses	
Level of general safety	High level of criminality, low detection rate

Source: GIME research.

Table 29. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Łódź sub-region in 2009

Factors	Characteristics
Strengths	
Quality of labour resources	Very high number of prospective employees, students and graduates, very high level of economic activity, health situation above average
Transport accessibility	Transport node of supra-regional importance with access to international airport, A-1 and A-2 motorway node, proximity to Warsaw
Market absorption	High purchasing power of households and enterprises
Level of economic development	Labour productivity above average, beneficial structure of the economy



Factors	Characteristics
Weaknesses	
Level of general safety	High level of criminality, very low detection rate

Source: GIME research.

Table 30. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Cracow sub-region in 2009

Factors	Characteristics
Strengths	
Quality of labour resources	High number of qualified staff, graduates and students, high level of economic and social activities
Transport accessibility	Transport node of supra-regional importance with access to international airport
Market absorption	High purchasing power of households and enterprises
Economic Infrastructure	Density of institutions in business environment, land available in SEZ
Social infrastructure	Very well developed infrastructure of culture, extensive hotel base, high spending on local public infrastructure
Level of economic development	High productivity of labour, beneficial structure of the economy
Weaknesses	
Level of general safety	Very low level of crime detection rate, crime rate above average

Source: GIME research.

Table 31. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Poznań sub-region in 2009

Factors	Characteristics
Strengths	
Quality of labour resources	High number of qualified staff and students, very high level of economic and social activities, health situation above average
Transport accessibility	Transport node of supra-regional importance with access to international air port, proximity to western border (and to excellent transport infrastructure)
Social infrastructure	Very well developed cultural infrastructure, high spending on local public infrastructure
Market absorption	High purchasing power of households and enterprises
Economic Infrastructure	High density of institutions in business environment, significant investment opportunities in SEZ
Level of economic development	High productivity of labour, beneficial structure of the economy
Weaknesses	
Level of general safety	Level of criminality above average

Source: GIME research.



Table 32. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Tri-City sub-region in 2009

Factors	Characteristics
Strengths	
Quality of labour resources	High number of students, level of economic and social activities above average
Transport accessibility	Transport node of supra-regional importance with access to international airport
Social infrastructure	Highly developed cultural infrastructure, extensive hotel and catering base, high spending on local public infrastructure
Market absorption	High purchasing power of households
Economic Infrastructure	High density of institutions in business environment, investment opportunities in SEZ
Quality of natural environment	Low level of pollution from domestic waste, percentage of protected areas above average
Level of economic development	High productivity of labour, beneficial structure of the economy
Weaknesses	
Level of general safety	High level of criminality, crime detection well below average

Source: GIME research.

Table 33. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Wrocław sub-region in 2009

Factors	Characteristics
Strengths	
Quality of labour resources	High number of students, high level of economic and social activities
Transport accessibility	Transport node of supra-regional importance with access to international air port, proximity to western border (and to excellent transport infrastructure)
Economic Infrastructure	Very high density of institutions in business environment, significant investment opportunities in SEZ
Social infrastructure	Highly developed cultural infrastructure, very high spending on local public infrastructure
Market absorption	High purchasing power of enterprises
Level of economic development	Productivity of labour above average, beneficial structure of the economy
Weaknesses	
Level of general safety	Very high level of criminality

Source: GIME research.



Table 34. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Katowice sub-region in 2009

Factors	Characteristics
Strengths	
Quality of labour resources	High number of students
Transport accessibility	Transport node of national importance with access to international airport
Economic Infrastructure	Very high investment opportunities in SEZ, good performance of SEZ
Market absorption	High purchasing power of households and enterprises
Level of economic development	Beneficial structure of the economy
Weaknesses	
Level of general safety	High level of criminality, low detection rate
Quality of natural environment	High level of untreated effluent , high level of atmospheric pollution, low percentage of protected areas

Source: GIME research.

Table 35. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Bydgoszcz-Toruń sub-region in 2009

Factors	Characteristics
Strengths	
Transport accessibility	Transport node of regional importance with access to international airport
Quality of labour resources	High number of students, high level of economic activity
Market absorption	Higher-than-average purchasing Power of households and enterprises
Social infrastructure	Cultural infrastructure above average, spending on local public infrastructure above average
Level of economic development	Beneficial structure of the economy
Weaknesses	
Level of general safety	Level of criminality above average

Source: GIME research.

Table 36. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Szczecin sub-region in 2009

Factors	Characteristics
Strengths	
Transport accessibility	Transport node of supra-regional importance with access to international airport, proximity to western border (and to excellent transport infrastructure)
Quality of labour resources	Number of students above average, very high level of economic activities, health situation above average



Factors	Characteristics
Economic Infrastructure	Density of institutions in business environment above average
Social infrastructure	Well-developed hotel base, extensive hospitality and catering activities
Level of economic development	Beneficial structure of the economy
Weaknesses	
Level of general safety	High level of criminality, relatively low level of crime detection
Quality of natural environment	Relatively high level of untreated waste and dust, low percentage of protected areas

Source: GIME research.

Table 37. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Bielsko-Biała sub-region in 2009

Factors	Characteristics
Strengths	
Market absorption	Purchasing power of households and enterprises above average
Quality of labour resources	Level of economic activities and health situation above average
Social infrastructure	Well-developed hotel base, extensive hospitality and catering activities
Level of economic development	Beneficial structure of the economy

Source: GIME research.

Table 38. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Rzeszów sub-region in 2009

Factors	Characteristics
Strengths	
Quality of labour resources	High number of students
Level of general safety	Low level of criminality

Source: GIME research.



Investment attractiveness of voivodships

The significance of individual location factors

The assessment of investment attractiveness of voivodships was performed against six groups of component indices. Their regional diversification is discussed in the order of significance for investment attractiveness (from highest to lowest):

- ◆ labour resources and cost of labour
- ◆ investor-oriented activities of voivodship authorities
- ◆ the availability of transport
- ◆ the size of the output market
- ◆ the level of economic infrastructure
- ◆ the level of social infrastructure
- ◆ the level of general safety.

This was the order in which IA factors were characterized, with particular attention given to the top scoring voivodships.

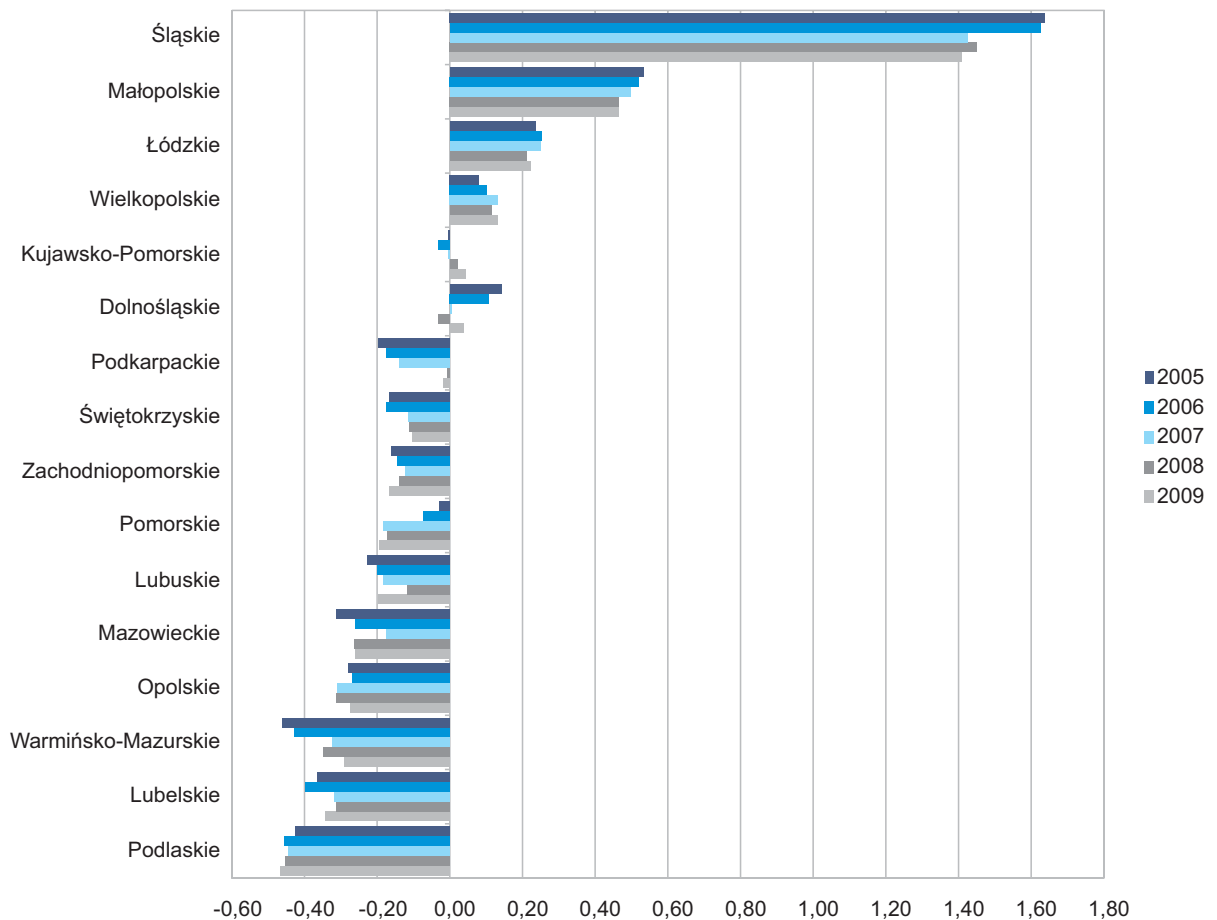
The Labour cost and resources

Spatial diversification of IA

Four regions are the most attractive with respect to labour cost and resources i.e. Wielkopolskie, Łódzkie,, Małopolskie, and Silesian (śląskie) voivodships. They exhibit different configurations of the key assets in this regard, i.e. the size and quality of labour. The size of workforce is a strong point of the Silesian and Małopolskie voivodships whereas the quality of labour resources is the asset of the other two regions. The cost of labour is not excessively high in the regions except for the Silesian voivodship.



Chart 1. The assessment of voivodships with respect to labour cost and resources



Source: GIME research.

The five lowest-scoring regions include the Mazowieckie, Opolskie, Warmińsko-Mazurskie, Lubelskie and Podlaskie voivodships. The remote ranking of the Mazovian (Mazowieckie) voivodship results from the highest level of remuneration in Poland, far-removed from the average wages in the other regions, as well as from a strong deficit of qualified workforce. In the remaining cases all the aspects of labour resources present themselves as a weak point: the density of those employed, unemployed and graduates. There are also qualitative deficits such as low level of entrepreneurship. Their strong point is low cost of labour except for the Opolskie voivodship which, as was the case with Mazovia, shows an acute deficit of qualified workforce that drives up wages slightly above the average in all voivodships.

The most attractive voivodships

Despite features in common, all voivodships show some differences in labour cost and resources. The four leading regions are characterised below.

**Table 39. The characteristics of labour resources of the Silesian (Śląskie) voivodship**

Aspects	Characteristics
Strengths	Plentiful labour resources – employees, the unemployed and graduates
Weaknesses	Quality of labour resources below average, high cost of labour
Changes	A distinct relative deterioration over 5 years; compared to 2008 continued decrease of advantage: low dynamics of employment in industry and services, slow growth of entrepreneurship, a distinct drop in the number of students (relative to other regions).

Source: GIME research.

Table 40. The characteristics of labour resources of the Małopolskie voivodship

Aspects	Characteristics
Strengths	Higher-than-average labour resources, especially secondary schools graduates and students
Changes	Gradual relative deterioration over 5 years, no significant changes compared to 2008

Source: GIME research.

Table 41. The characteristics of labour resources of the Łódzkie voivodship

Aspects	Characteristics
Strengths	Labour resources slightly above average, wages below average
Changes	Slight deterioration over 5 years; slight improvement over 2007 – very distinct decrease of deficit in qualified employees, growth in the number of students

Source: GIME research.

Table 42. The characteristics of labour resources of the Wielkopolskie voivodship

Aspects	Characteristics
Strengths	Quality of labour resources above average – high level of economic and social activities
Changes	Gradual relative improvement over 5 years; continued improvement over previous year, distinct increase in labour supply

Source: GIME research.

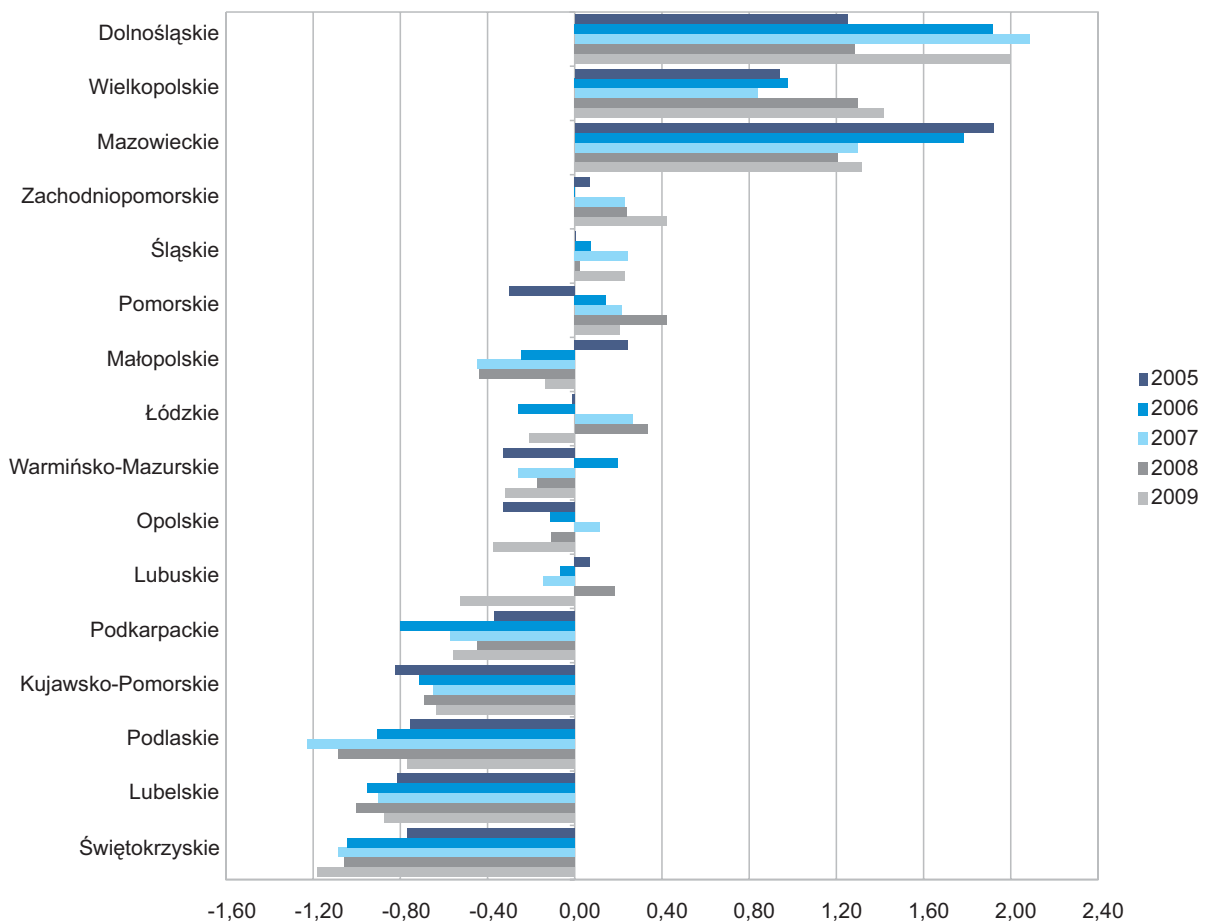


Investor-oriented activities

Spatial diversification of investment attractiveness

As regards investor-oriented activities of the voivodships, three regions show a clear and durable domination: Wielkopolskie, Lower Silesian (Dolnośląskie), and Mazovian (Mazowieckie) voivodships. The all receive a higher-than-average number of investment offers. Departments for the Promotion of Trade and Investment (at Polish embassies) note a significant interest of prospective investors and they often co-operate with the authorities of these regions. Among them relatively few offers in the PALiZ database (Polish Agency for Information and Foreign Investment) target the Mazovian voivodship. That last region, however, enjoys a strong recognition abroad as it hosts the capitol of Poland in its territory. In addition to the three aforementioned regions, a higher-than-average investor-oriented activity is seen in three other voivodships: Western Pomeranian (Zachodniopomorskie), Silesian (Śląskie) and Pomeranian (Pomorskie).

Chart 2. The assessment of voivodships with respect to investor-oriented activities



Source: GIME research.

The rating list of regions bottoms out with Podlaskie, Lubelskie and Świętokrzyskie voivodships whose value of synthetic index is by far the lowest. All these regions attract few location offers in the



PAIIZ database and are rarely mentioned in the questionnaires of Departments for the Promotion of Trade and Investment at the Polish embassies.

The most attractive voivodships

Despite features in common, all voivodships show some differences in their investor-related activities. The three leading regions are characterised below.

Table 43. The characteristics of the Lower Silesian (Dolnośląskie) voivodship with respect to investor-oriented activities

Aspects	Characteristics
Strengths	Very high number of investment offers, high intensity of information activities
Changes	Lack of significant changes over 5 years; a distinct increase in the number of investment offers over previous year

Source: GIME research.

Table 44. The characteristics of the Wielkopolskie voivodship with respect to investor-oriented activities

Aspects	Characteristics
Strengths	High number of investment offers; high intensity of information activities
Changes	Improvement over 5 years and over 2008 – increased number of investment offers and increased intensity of information campaign

Source: GIME research.

Table 45. The characteristics of the Mazovian (Mazowieckie) voivodship with respect to investor-oriented activities

Aspects	Characteristics
Strengths	High intensity of information campaign
Changes	Significant decrease over 5 years; slight improvement over 2008 with regard to the number of investment offers and intensity of information campaign

Source: GIME research.

The availability of transport

Spatial diversification of investment attractiveness

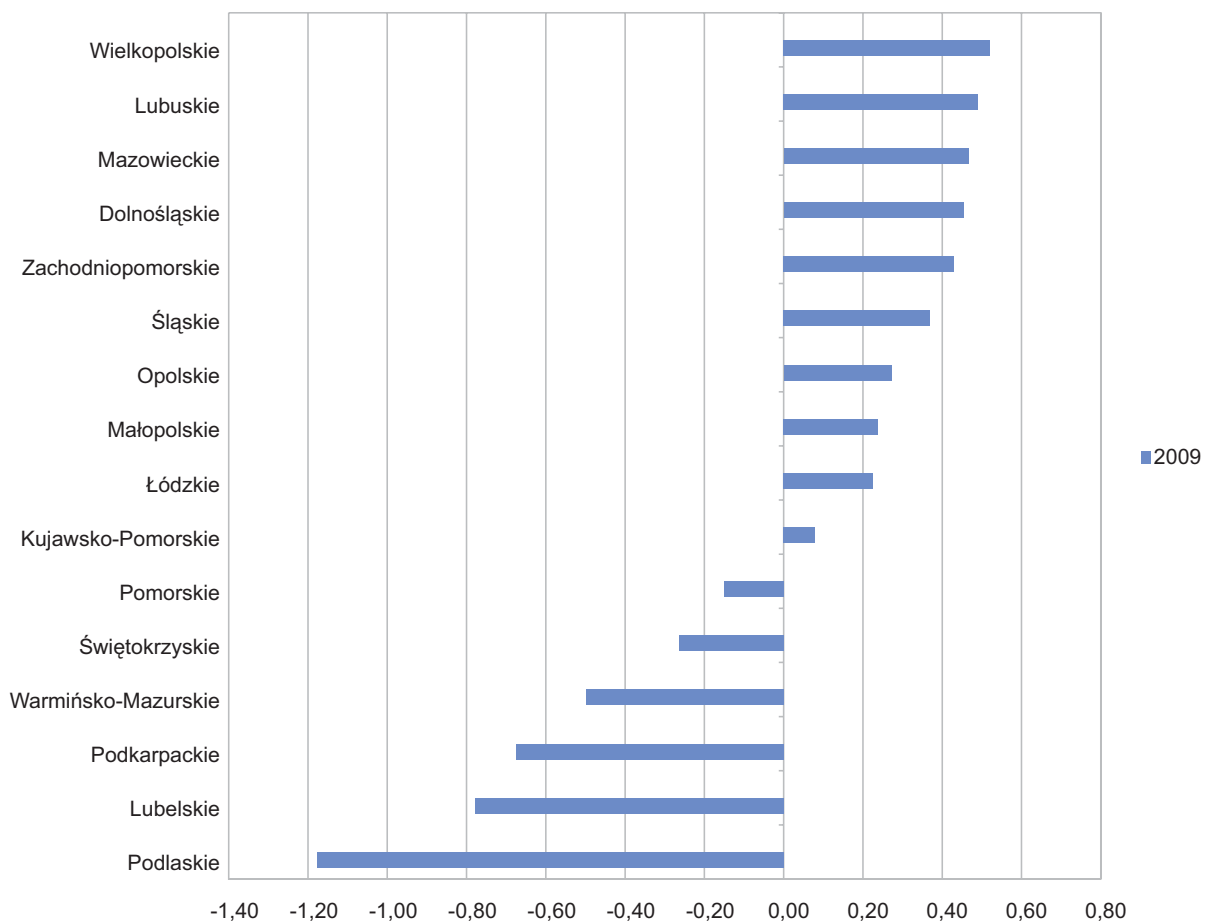
A high level of transport accessibility characterizes as many as six voivodships: Silesian, Western Pomeranian, Mazovian, Lubuskie, and Wielkopolskie. The feature that they all share in common is



good accessibility of the Western border of Poland except for the Mazovian region. As regards other parameters of transport accessibility these regions present different pictures.

The lowest degree of transport accessibility is seen in the four voivodships of eastern Poland. In addition to a long distance to the western border, this area is characterized by the lack of international air links (except for the Podkarpackie voivodship) and a poorly developed transport and logistics sector.

Chart 3. The assessment of voivodships with respect to availability of transport



Source: GIME research.

The most attractive voivodships

There is a significant degree of variation among voivodships with respect to the aspects of transport accessibility. This also pertains to the regions that enjoy the most beneficial location.



Table 46. The characteristics of the Wielkopolskie voivodship with respect to the availability of transport

Aspects	Characteristics
Strengths	Proximity to western border, distance to sea port lower than average, no weak points

Source: GIME research.

Table 47. The characteristics of the Lubuskie voivodship with respect to the availability of transport

Aspects	Characteristics
Strengths	Proximity to western border, short distance to sea port, well-developed sector of transport and logistics
Weaknesses	Low density of road network, long distance to Warsaw

Source: GIME research.

Table 48. The characteristics of the Mazovian voivodship with respect to the availability of transport

Aspects	Characteristics
Strengths	Key transport hub in Poland, higher-than-average level of development of transport and logistics' sector, high intensity of carriage by air

Source: GIME research.

Table 49. The characteristics of the Lower Silesian (Dolnośląskie) voivodship with respect to the availability of transport

Aspects	Characteristics
Strengths	Proximity to western border

Source: GIME research.

Table 50. The characteristics of the Western Pomeranian (Zachodniopomorskie) voivodship with respect to the availability of transport

Aspects	Characteristics
Strengths	Proximity to western border, presence of sea port, high level of development of transport and logistics' sector
Weaknesses	Low density of road network, long distance to Warsaw, low intensity of passenger carriage by air

Source: GIME research.



Table 51. The characteristics of the Silesian (Śląskie) voivodship with respect to the availability of transport

Aspects	Characteristics
Strengths	Względnie dobre skomunikowanie z granicą zachodnią; duża liczba międzynarodowych połączeń lotniczych; ponadprzeciętna intensywność pasażerskich przewozów lotniczych
Weaknesses	Duża odległość do portu morskiego

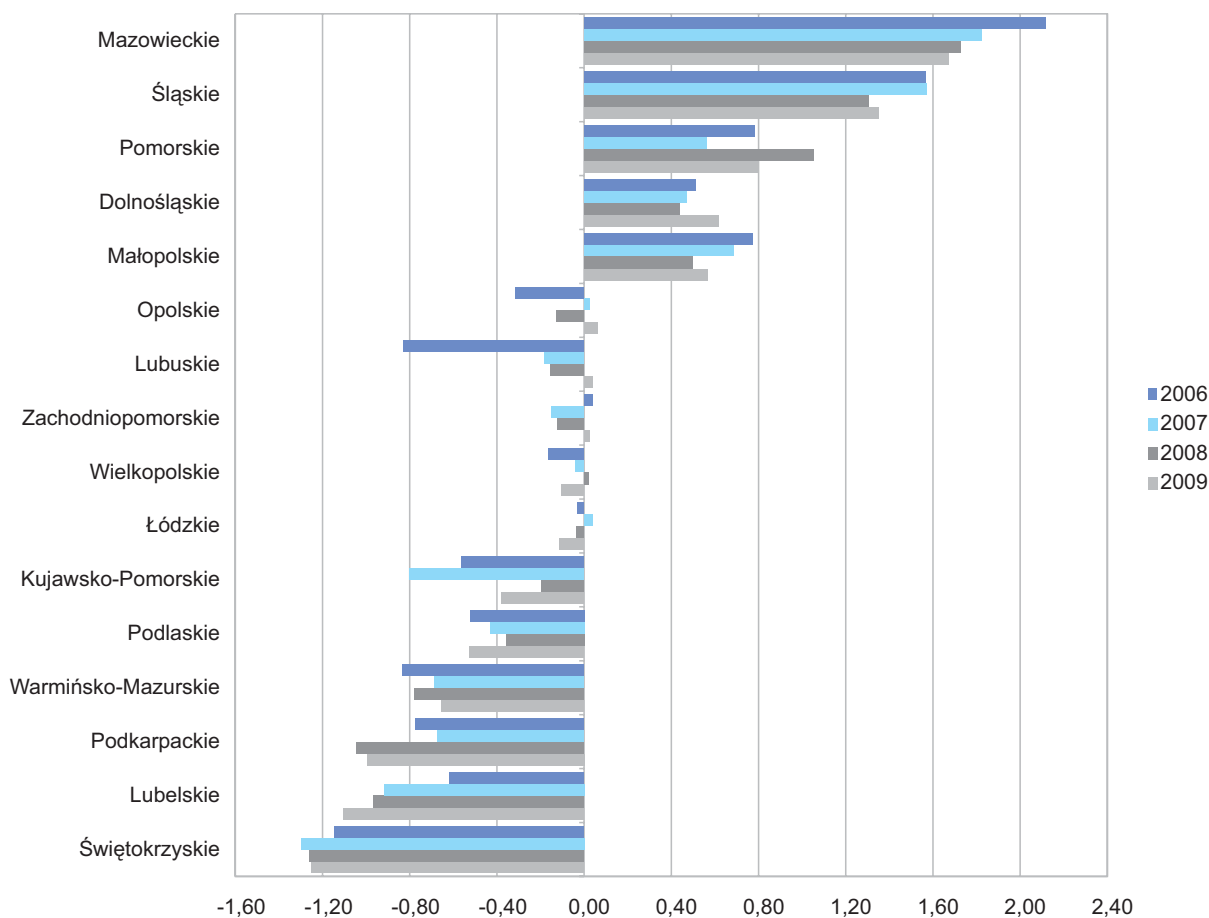
Source: GIME research.

The absorption capacity of the market

A spatial diversification of investment attractiveness

Two voivodships have noted a well-above-the-average market absorption, i.e. Mazovian and Silesian. Both these regions experience high investment demand generated by enterprises. . As regards other parameters of market absorption the regions present different pictures.

Chart 4. The assessment of voivodships with respect to market absorption



Source: GIME research.



Three voivodships of eastern Poland, i.e. Podkarpackie, Lubelskie and Świętokrzyskie, exhibit the lowest absorption capacity of market. These areas are scarcely populated with households and business operators showing a much lower-than-average purchasing power.

The most attractive voivodships

As we mentioned before, two leaders in market absorption differ with respect to specific factors. Below are the characteristics of these regions with respect to market absorption.

Table 52. The characteristics of the Mazovian voivodship with respect to market absorption

Aspects	Characteristics
Strengths	High purchasing power of households and enterprises
Changes	Significant relative decrease over 4 years; a slight decrease over 2008 – a higher dynamic of purchasing power in other regions, especially in households' sector

Source: GIME research.

Table 53. The characteristics of the Silesian voivodship with respect to market absorption

Aspects	Characteristics
Strengths	Very high density of population; high purchasing power of enterprises
Changes	Relative decrease over 4 year and a slight increase over 2008.

Source: GIME research.



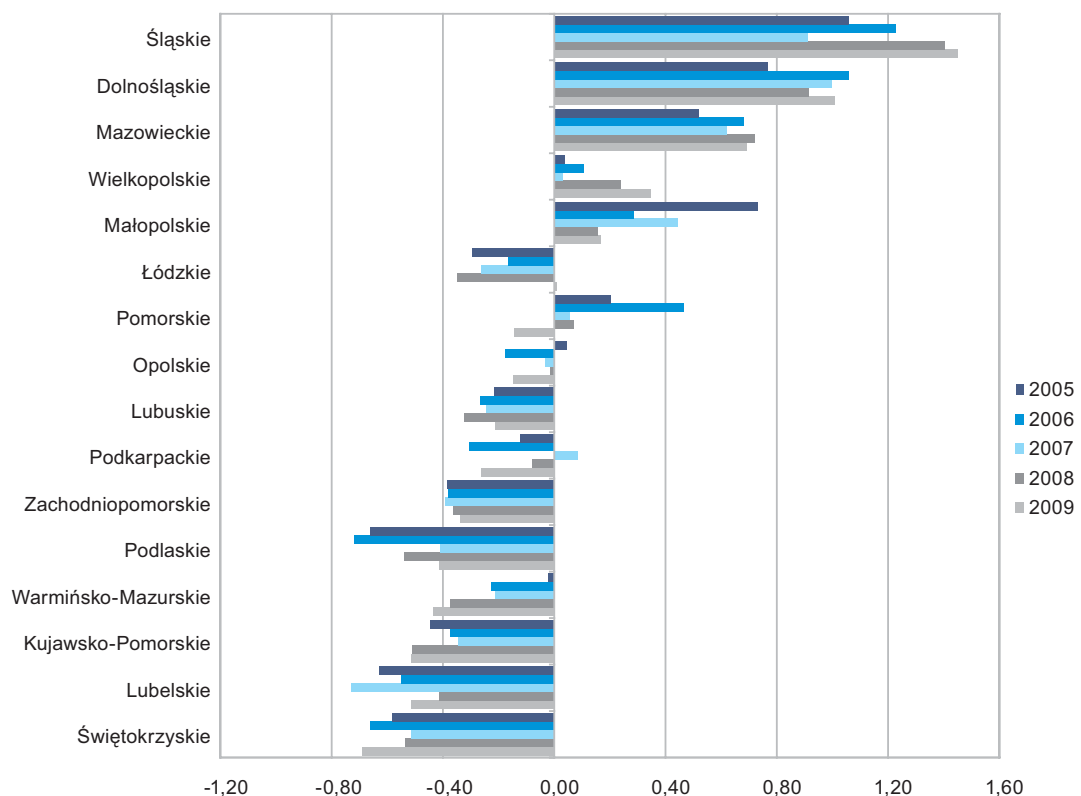
The economic infrastructure

A spatial diversification of attraction

A high level of economic infrastructure is featured in three voivodships: Silesian, Lower Silesian and Mazovian. The trait they have in common is a well-developed R&D sector. As regards other parameters of economic infrastructure the regions present different pictures.

A low level of economic infrastructure was noted in the following voivodships: Western Pomeranian (Zachodniopomorskie), Podlaskie, Warmińsko-Mazurskie, Kujawsko-Pomorskie, Lubelskie and Świętokrzyskie. Sectors such as finance, insurance, consultancy, real estate services (i.e. business environment) and the R&D infrastructure are poorly developed. The only asset they have is a high ranking in the fairs and exhibitions' sector of Świętokrzyskie, which is not sufficient to improve the ranking of the voivodship, and a well-developed business environment in the Western Pomeranian region.

Chart 5. The assessment of voivodships with respect to economic infrastructure



Source: GIME research.

The most attractive voivodships

The make-up of attraction factors with respect to economic infrastructure is specific to each of the regions. Also, the three best performing regions feature, to some degree, a different set of strong and weak points

**Table 54. The characteristics of the Silesian voivodship with respect to economic infrastructure**

Aspects	Characteristics
Strengths	Well-developed R&D sector , plentiful land available for investment in SEZ
Weaknesses	Low fairs and exhibitions 'activity
Changes	Increased fairs and exhibitions' effort over 5 years and over 2008

Source: GIME research.

Table 55. The characteristics of the Lower Silesian (Dolnośląskie) voivodship with respect to economic infrastructure

Aspects	Characteristics
Strengths	Well-developed business environment, plentiful land available for investment in SEZ
Weaknesses	Low fairs and exhibitions 'activity
Changes	Increase over 5 years; increase over 2008 – more land available in SEZ, more investor activity in SEZ, dynamic of R&D sector above average

Source: GIME research.

Table 56. The characteristics of the Mazovian voivodship with respect to economic infrastructure

Aspects	Characteristics
Strengths	Well-developed business environment, well-developed R&D sector, fairs and exhibitions' effort above average
Weaknesses	Very Little land available for investment in SEZ, low investor activity
Changes	Increase over 5 year, slight decrease over 2008 – less land available for investment in SEZ

Source: GIME research.



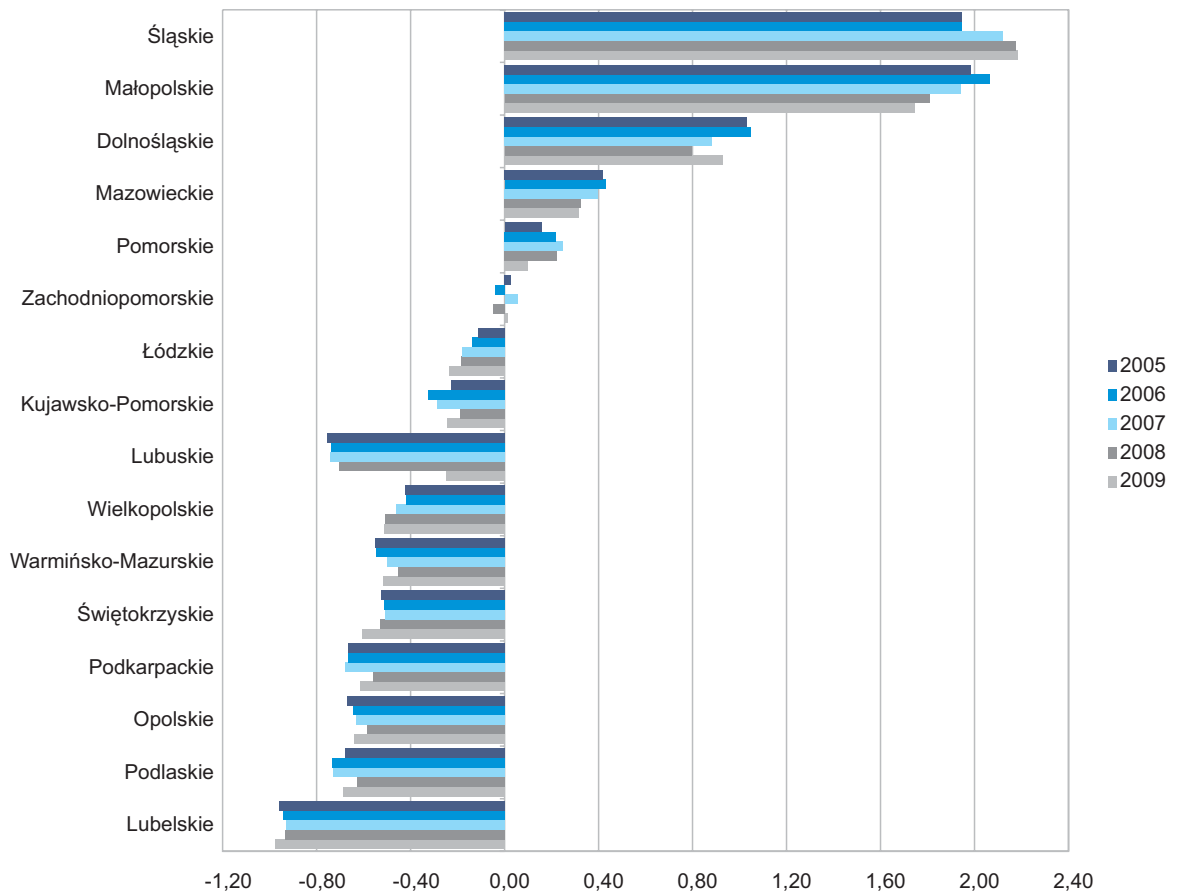
The social infrastructure

A spatial diversification of attractiveness

A high level of social infrastructure was noted in three regions. The top scoring voivodships are Silesian (Śląskie) and Małopolskie. The Lower Silesian (Dolnośląskie) falls way behind the two leaders but is well ahead of the next regions down the ladder. The top three voivodships feature a well developed cultural life and an extensive tourist infrastructure.

The group of regions that presents low attraction with respect to social infrastructure is numerous, with the Lubelskie region as a salient example. It is characterized by a low intensity of cultural life and a low level of tourist infrastructure development.

Chart 6. The assessment of voivodships with respect to social infrastructure



Source: GIME research.

The most attractive regions

The level of development of the social infrastructure is a function of various factors. Their roles vary across the regions. The three leading regions feature different configurations of social infrastructure components.

**Table 57. The characteristics of the Silesian voivodship with respect to social infrastructure**

Aspects	Characteristics
Strengths	High intensity of cultural activities, well-developed hotel and catering infrastructure, high activity of local cultural establishments
Changes	Improvement over 5 years, lack of significant changes compared to previous year

Source: GIME research.

Table 58. The characteristics of the Małopolskie voivodship with respect to social infrastructure

Aspects	Characteristics
Strengths	High intensity of cultural activities, well-developed hotel and catering infrastructure, high activity of local cultural establishments
Changes	Distinct relative deterioration over 5 years and a slight deterioration over previous year - annual dynamic of cultural activities lower than average

Source: GIME research.

Table 59. The characteristics of the Lower Silesian voivodship with respect to social infrastructure

Aspects	Characteristics
Strengths	Intensity of cultural activities above average, well-developed hotel infrastructure
Changes	Slight relative deterioration over 5 years; a slight improvement over previous year – a distinct growth in the intensity of cultural activities

Source: GIME research.

The level of general safety

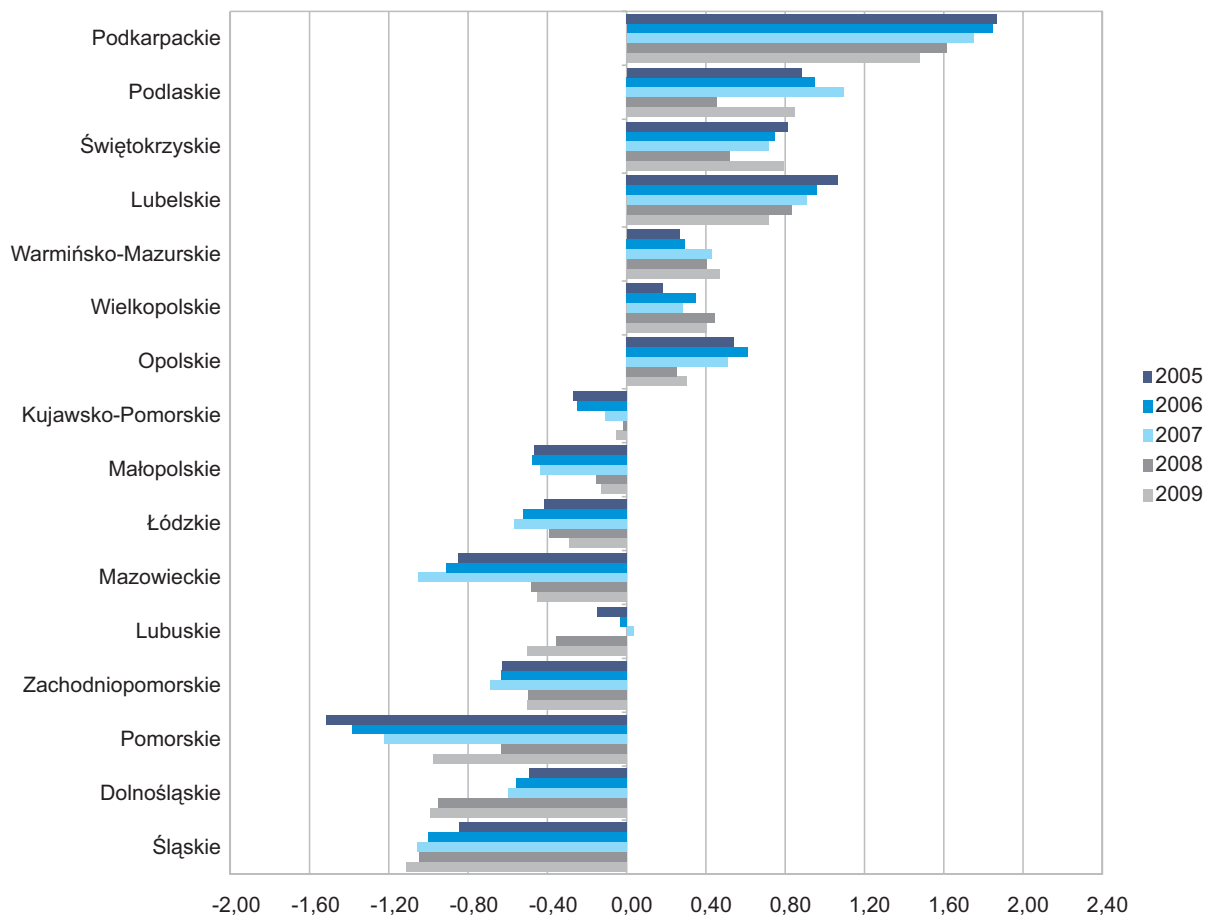
A spatial diversification of attraction

The leaders with respect to general safety are four voivodships of southern Poland: Lubelskie, Świętokrzyskie, Podlaskie, and Podkarpackie. This score results form a low or average level of criminality and a high or average rate of crime detection.

The rating list of regions with respect to general safety bottoms out with three voivodships: Pomeranian (Pomorskie), Lower Silesian (Dolnośląskie) and Silesian (Śląskie). They feature a much higher-than-average level of criminality and a low rate of crime detection. An exception in this respect is the Lower Silesian voivodship whose crime detection rate does not significantly deviate from the average.



Chart 7. The assessment of voivodships with respect to general safety



Source: GIME research.

The most attractive voivodships

The level of general safety is a function of two factors. Each of them assumes different values depending on the region. The four leading regions differ in the make-up of components that describe the level of general safety.

Table 60. The characteristics of the Podkarpackie voivodship with respect to general safety

Aspects	Characteristics
Strengths	Very low level of criminality; crime detection above average
Changes	Deterioration over 5 years and over previous year – a relatively high annual dynamic of crime rate and a low detection rate

Source: GIME research.

**Table 61. The characteristics of the Podlaskie voivodship with respect to general safety**

Aspects	Characteristics
Strengths	Low level of criminality
Changes	Relative deterioration over 5 years , improvement over previous year – very high dynamic of crime detection

Source: GIME research.

Table 62. The characteristics of the Świętokrzyskie voivodship with respect to general safety

Aspects	Characteristics
Strengths	High rate of crime detection
Changes	No significant changes over 5 years, improvement over previous year – very distinct drop in crime rate

Source: GIME research.

Table 63. The characteristics of the Lubelskie voivodship with respect to general safety

Aspects	Characteristics
Strengths	Low level of criminality
Changes	Relative deterioration over 5 years and over previous year – annual dynamic of crime reduction and increased crime detection no higher than average.

Source: GIME research.

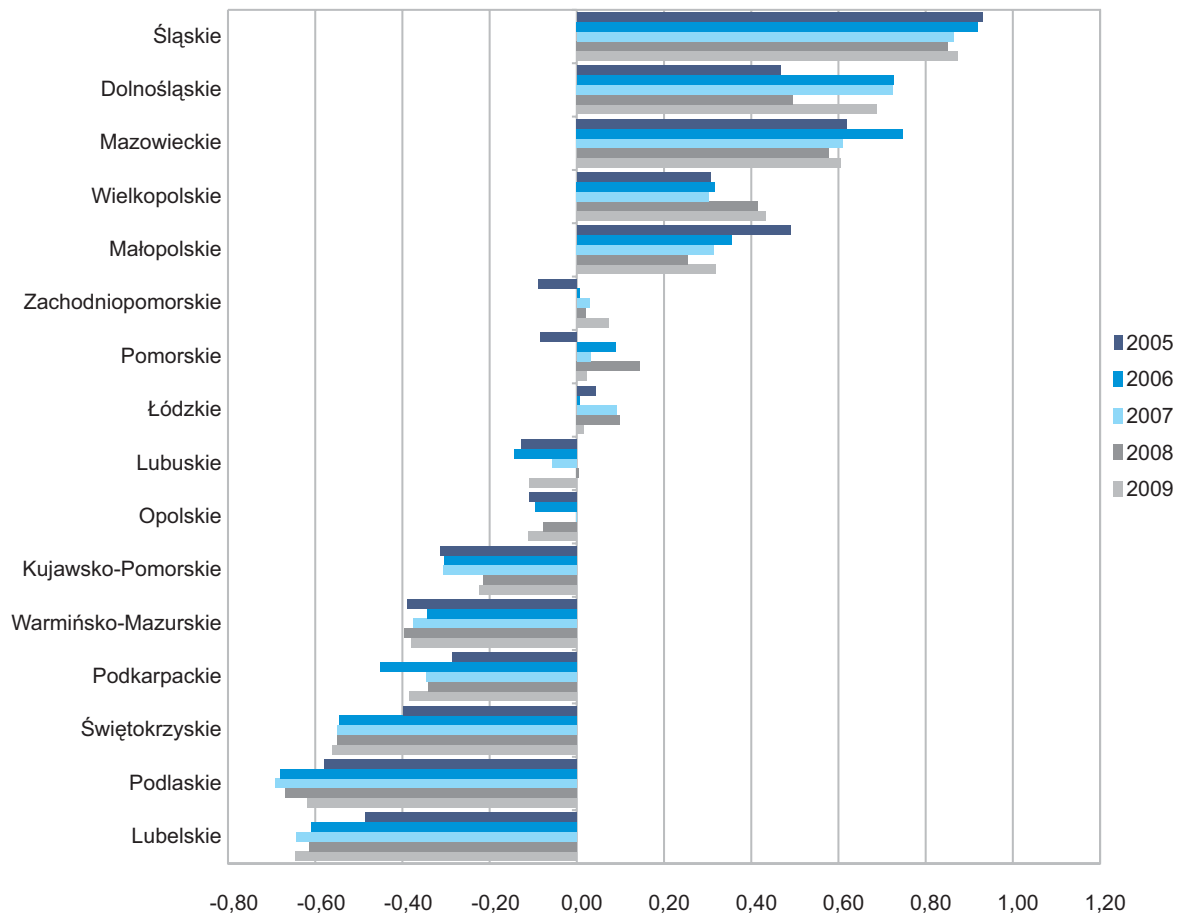
Investment attractiveness – a synthetic perspective

A spatial diversification of attraction

The Silesian voivodship no doubt remains to be a leader in investment attractiveness. A high level of IA is shown in the voivodships of Lower Silesia (Dolnośląskie) and Mazovian (Mazowieckie). A much higher-than-average IA is featured by the Wielkopolskie and the Małopolskie voivodships. A slightly higher-than-average IA is featured by three regions: Western Pomeranian (Zachodniopomorskie), Pomeranian (Pomorskie) and Łódzkie. All of the aforementioned regions take high or average ranking with respect to individual aspects of IA. However, the configuration of these advantages is quite diversified.

A slightly lower-than-average IA characterizes the Lubuskie, Opolskie and Kujawsko-Pomorskie voivodships. The category of voivodships defined by low attraction is comprised of Warmińsko-Mazurskie and Podkarpackie. The rating list bottoms out with Świętokrzyskie, Podlaskie and Lubelskie.

Chart 8. The assessment of voivodships with respect to investment attractiveness



Source: GIME research.

The most attractive voivodships

The attraction profile of five voivodships characterized as highest, high and well-above-average differs quite significantly, despite some features in common. Each of them features a slightly different make-up of strong and weak points in this regard.

Table 64. The characteristics of the Silesian (Śląskie) voivodship with respect to investment attractiveness

Aspects	Characteristics
Strengths	Labour cost and resources, output market; economic infrastructure; social infrastructure
Weaknesses	Level of general safety
Changes	Slight relative decrease over 5 years; slight increase over previous year due to improved investor-oriented activities

Source: GIME research.



Table 65. The characteristics of the Lower Silesian (Dolnośląskie) voivodship with respect to investment attractiveness

Aspects	Characteristics
Strengths	Transport accessibility; output market, economic infrastructure; social infrastructure, investor-oriented activities
Weaknesses	Level of general safety
Changes	Increase over 5 years and over 2008 due to investor-oriented activities, growth in human resources and increased market absorption

Source: GIME research.

Table 66. The characteristics of the Mazovian (Mazowieckie) voivodship with respect to investment attractiveness

Aspects	Characteristics
Strengths	Output market, economic infrastructure; social infrastructure, investor-oriented activities
Weaknesses	Cost of labour; Level of general safety
Changes	Slight relative decrease over 5 years; slight increase over 2008 due to investor-oriented activities

Source: GIME research.

Table 67. The characteristics of the Wielkopolskie voivodship with respect to investment attractiveness

Aspects	Characteristics
Strengths	Labour cost and resources, transport accessibility; economic infrastructure, investor-oriented activities
Changes	Systematic improvement over 5 years; a slight improvement over previous year due to investor-oriented activities and economic infrastructure

Source: GIME research.

Table 68. The characteristics of the Małopolskie voivodship with respect to investment attractiveness

Aspects	Characteristics
Strengths	Labour cost and resources, social infrastructure
Changes	Decrease over 5 years; increase over 2008 due to increased investor-oriented activities

Source: GIME research.

Table 69. Investment attractiveness of voivodships in 2009

		Transport accessibility		Labour market		Market size		Economic infrastr.		Social infrastr.		Public safety		AActivities of voivodships		Investment attractiveness of voivodships	
		Value	Rank	Value	Rank	Value	Rank	Value	Rank	Value	Rank	Value	Rank	Value	Rank	Value	Rank
	Weight (in percent)	20		25		15		10		5		5		20			
1	Śląskie	0,37	6	1,41	1	1,35	2	1,45	1	2,18	1	-1,11	16	0,23	5	0,87	1
2	Dolnośląskie	0,45	4	0,04	6	0,62	4	1,01	2	0,93	3	-0,99	15	1,99	1	0,69	2
3	Mazowieckie	0,47	3	-0,26	12	1,67	1	0,69	3	0,32	4	-0,45	11	1,32	3	0,60	3
4	Wielkopolskie	0,52	1	0,13	4	-0,10	9	0,35	4	-0,51	10	0,40	6	1,42	2	0,43	4
5	Małopolskie	0,24	8	0,47	2	0,56	5	0,17	5	1,74	2	-0,13	9	-0,13	7	0,32	5
6	Zachodniopomorskie	0,43	5	-0,17	9	0,03	8	-0,34	11	0,01	6	-0,50	13	0,42	4	0,07	6
7	Pomorskie	-0,15	11	-0,19	10	0,80	3	-0,14	7	0,10	5	-0,98	14	0,20	6	0,02	7
8	Łódzkie	0,23	9	0,22	3	-0,11	10	0,01	6	-0,24	7	-0,29	10	-0,21	8	0,02	8
9	Lubuskie	0,49	2	-0,2	11	0,04	7	-0,21	9	-0,25	9	-0,50	12	-0,53	11	-0,11	9
10	Opolskie	0,27	7	-0,27	13	0,06	6	-0,15	8	-0,64	14	0,30	7	-0,38	10	-0,11	10
11	Kujawsko-Pomorskie	0,08	10	0,04	5	-0,38	11	-0,51	14	-0,24	8	-0,06	8	-0,64	13	-0,22	11
12	Warmińsko-Mazurskie	-0,5	13	-0,29	14	-0,65	13	-0,43	13	-0,52	11	0,47	5	-0,32	9	-0,38	12
13	Podkarpackie	-0,67	14	-0,02	7	-1,00	14	-0,26	10	-0,62	13	1,48	1	-0,56	12	-0,38	13
14	Świętokrzyskie	-0,26	12	-0,1	8	-1,25	16	-0,69	16	-0,61	12	0,79	3	-1,18	16	-0,56	14
15	Podlaskie	-1,18	16	-0,47	16	-0,53	12	-0,41	12	-0,69	15	0,85	2	-0,77	14	-0,62	15
16	Lubelskie	-0,78	15	-0,34	15	-1,10	15	-0,52	15	-0,98	16	0,72	4	-0,88	15	-0,65	16

Source: GIME research.

Table 70. Changes in investment attractiveness of voivodships between 2005 and 2009

	Synthetic index in 2005	Ranking in 2005	Synthetic index in 2006	Ranking in 2006	Synthetic index in 2007	Ranking in 2007	Synthetic index in 2008	Ranking in 2008	Synthetic index in 2009	Ranking in 2009	Ranking Change 2009-2008
Śląskie	0,93	1	0,92	1	0,86	1	0,85	1	0,87	1	0
Dolnośląskie	0,47	4	0,73	3	0,73	2	0,50	3	0,69	2	+1
Mazowieckie	0,62	2	0,75	2	0,61	3	0,58	2	0,61	3	-1
Wielkopolskie	0,31	5	0,32	5	0,30	5	0,41	4	0,43	4	0
Małopolskie	0,49	3	0,35	4	0,31	4	0,25	5	0,32	5	0
Zachodniopomorskie	-0,09	8	0,01	8	0,03	8	0,02	8	0,07	6	+2
Pomorskie	-0,08	7	0,09	6	0,03	7	0,14	6	0,02	7	-1
łódzkie	0,04	6	0,01	7	0,09	6	0,10	7	0,02	8	-1
Lubuskie	-0,13	10	-0,14	10	-0,06	10	0,01	9	-0,11	9	0
Opolskie	-0,11	9	-0,09	9	0,00	9	-0,08	10	-0,11	10	0
Kujawsko-Pomorskie	-0,31	12	-0,30	11	-0,31	11	-0,21	11	-0,22	11	0
Warmińsko-Mazurskie	-0,39	13	-0,34	12	-0,38	13	-0,40	13	-0,38	12	+1
Podkarpackie	-0,29	11	-0,45	13	-0,35	12	-0,34	12	-0,38	13	-1
Świętokrzyskie	-0,40	14	-0,54	14	-0,55	14	-0,55	14	-0,56	14	0
Podlaskie	-0,58	16	-0,68	16	-0,69	16	-0,67	16	-0,62	15	+1
Lubelskie	-0,49	15	-0,61	15	-0,64	15	-0,61	15	-0,65	16	-1

Source: GIME research.



LIST OF TABLES

Table 1.	Investment attractiveness of voivodships in 2009.....	7
Table 2.	Factors and their significance with respect to investment attractiveness of sub-regions and voivodships.....	12
Table 3.	Sub-regional investment attractiveness with respect to industrial activities between 2008 and 2009.....	23
Table 4.	Investment attractiveness with respect to industrial activity – strong and weak points of the Katowice sub-region in 2009	23
Table 5.	Investment attractiveness with respect to industrial activity – strong and weak points of the Rybnik sub-region in 2009	24
Table 6.	Investment attractiveness with respect to industrial activity – strong and weak points of the Łódź sub-region in 2009.....	24
Table 7.	Investment attractiveness with respect to industrial activity – strong and weak points of the Poznań sub-region in 2009	24
Table 8.	Investment attractiveness with respect to industrial activity – strong and weak points of the Bydgoszcz-Toruń sub-region in 2009	25
Table 9.	Investment attractiveness with respect to industrial activity – strong and weak points of the Wałbrzych sub-region in 2009	25
Table 10.	Investment attractiveness with respect to industrial activity – strong and weak points of the Wrocław sub-region in 2009.....	26
Table 11.	Investment attractiveness with respect to industrial activity – strong and weak points of the Cracow sub-region in 2009	26
Table 12.	Investment attractiveness with respect to industrial activity – strong and weak points of the Oświęcim sub-region in 2009	26
Table 13.	Investment attractiveness with respect to industrial activity – strong and weak points of the Tarnobrzeg sub-region in 2009	27
Table 14.	Investment attractiveness with respect to industrial activity – strong and weak points of the Bielsko sub-region in 2009.....	27
Table 15.	Sub-regional investment attractiveness for services 2008-2009.....	29
Table 16.	Investment attractiveness with respect to services – strong and weak points of the Łódź sub-region in 2009	29
Table 17.	Investment attractiveness with respect to services – strong and weak points of the Warsaw sub-region in 2009	30
Table 18.	Investment attractiveness with respect to services – strong and weak points of the Katowice sub-region in 2009.....	30
Table 19.	Investment attractiveness with respect to services – strong and weak points of the Cracow sub-region in 2009	31
Table 20.	Investment attractiveness with respect to services – strong and weak points of the Poznań sub-region in 2009	31
Table 21.	Investment attractiveness with respect to services – strong and weak points of the Bydgoszcz-Toruń sub-region in 2009	31



Table 22. Investment attractiveness with respect to services – strong and weak points of the Wrocław sub-region in 2009	32
Table 23. Investment attractiveness with respect to services – strong and weak points of the Tri-City sub-region in 2009	32
Table 24. Investment attractiveness with respect to services – strong and weak points of the Wałbrzych sub-region in 2009	33
Table 25. Investment attractiveness with respect to services – strong and weak points of the Rzeszów sub-region in 2009.....	33
Table 26. Investment attractiveness with respect to services – strong and weak points of the Bielsko-Biała sub-region in 2009.....	33
Table 27. Sub-regional attractiveness with respect to advanced technologies 2008-2009.....	34
Table 28. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Warsaw sub-region in 2009.....	36
Table 29. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Łódź sub-region in 2009	36
Table 30. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Cracow sub-region in 2009.....	37
Table 31. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Poznań sub-region in 2009	37
Table 32. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Tri-City sub-region in 2009	38
Table 33. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Wrocław sub-region in 2009	38
Table 34. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Katowice sub-region in 2009.....	39
Table 35. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Bydgoszcz-Toruń sub-region in 2009	39
Table 36. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Szczecin sub-region in 2009.....	39
Table 37. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Bielsko-Biała sub-region in 2009	40
Table 38. Sub-regional attractiveness with respect to advanced technologies – strong and weak points of the Rzeszów sub-region in 2009	40
Table 39. The characteristics of labour resources of the Silesian (Śląskie) voivodship	43
Table 40. The characteristics of labour resources of the Małopolskie voivodship.....	43
Table 41. The characteristics of labour resources of the Łódzkie voivodship	43
Table 42. The characteristics of labour resources of the Wielkopolskie voivodship.....	43
Table 43. The characteristics of the Lower Silesian (Dolnośląskie) voivodship with respect to investor-oriented activities	45
Table 44. The characteristics of the Wielkopolskie voivodship with respect to investor-oriented activities	45
Table 45. The characteristics of the Mazovian (Mazowieckie) voivodship with respect to investor-oriented activities	45



Table 46. The characteristics of the Wielkopolskie voivodship with respect to the availability of transport	47
Table 47. The characteristics of the Lubuskie voivodship with respect to the availability of transport	47
Table 48. The characteristics of the Mazovian voivodship with respect to the availability of transport	47
Table 49. The characteristics of the Lower Silesian (Dolnośląskie) voivodship with respect to the availability of transport	47
Table 50. The characteristics of the Western Pomeranian (Zachodniopomorskie) voivodship with respect to the availability of transport	47
Table 51. The characteristics of the Silesian (Śląskie) voivodship with respect to the availability of transport	48
Table 52. The characteristics of the Mazovian voivodship with respect to market absorption.....	49
Table 53. The characteristics of the Silesian voivodship with respect to market absorption	49
Table 54. The characteristics of the Silesian voivodship with respect to economic infrastructure	51
Table 55. The characteristics of the Lower Silesian (Dolnośląskie) voivodship with respect to economic infrastructure.....	51
Table 56. The characteristics of the Mazovian voivodship with respect to economic infrastructure.....	51
Table 57. The characteristics of the Silesian voivodship with respect to social infrastructure.....	53
Table 58. The characteristics of the Małopolskie voivodship with respect to social infrastructure	53
Table 59. The characteristics of the Lower Silesian voivodship with respect to social infrastructure	53
Table 60. The characteristics of the Podkarpackie voivodship with respect to general safety.....	54
Table 61. The characteristics of the Podlaskie voivodship with respect to general safety	55
Table 62. The characteristics of the Świętokrzyskie voivodship with respect to general safety	55
Table 63. The characteristics of the Lubelskie voivodship with respect to general safety	55
Table 64. The characteristics of the Silesian (Śląskie) voivodship with respect to investment attractiveness	56
Table 65. The characteristics of the Lower Silesian (Dolnośląskie) voivodship with respect to investment attractiveness.....	57
Table 66. The characteristics of the Mazovian (Mazowieckie) voivodship with respect to investment attractiveness	57
Table 67. The characteristics of the Wielkopolskie voivodship with respect to investment attractiveness	57
Table 68. The characteristics of the Małopolskie voivodship with respect to investment attractiveness	57
Table 69. Investment attractiveness of voivodships in 2009.....	58
Table 70. Changes in investment attractiveness of voivodships between 2005 and 2009	59



LIST OF CHARTS

Chart 1. The assessment of voivodships with respect to labour cost and resources	42
Chart 2. The assessment of voivodships with respect to investor-oriented activities	44
Chart 3. The assessment of voivodships with respect to availability of transport	46
Chart 4. The assessment of voivodships with respect to market absorption.....	48
Chart 5. The assessment of voivodships with respect to economic infrastructure	50
Chart 6. The assessment of voivodships with respect to social infrastructure	52
Chart 7. The assessment of voivodships with respect to general safety.....	54
Chart 8. The assessment of voivodships with respect to investment attractiveness.....	56

LIST OF MAPS

Map 1. Sub-regional investment attractiveness with respect to industrial activities in 2009.....	22
Map 2. Sub-regional investment attractiveness with respect to services in 2009	28
Map 3. Sub-regional attractiveness with respect to advanced technologies in 2009	35

