

MAZOWIECKIE VOIVODESHIP

MASOVIA REGION – ADMINISTRATION & ECONOMY



Presentation: MARIUSZ RUKAT

Plenipotentiary of the Marshall of the Mazovian Voivodeship

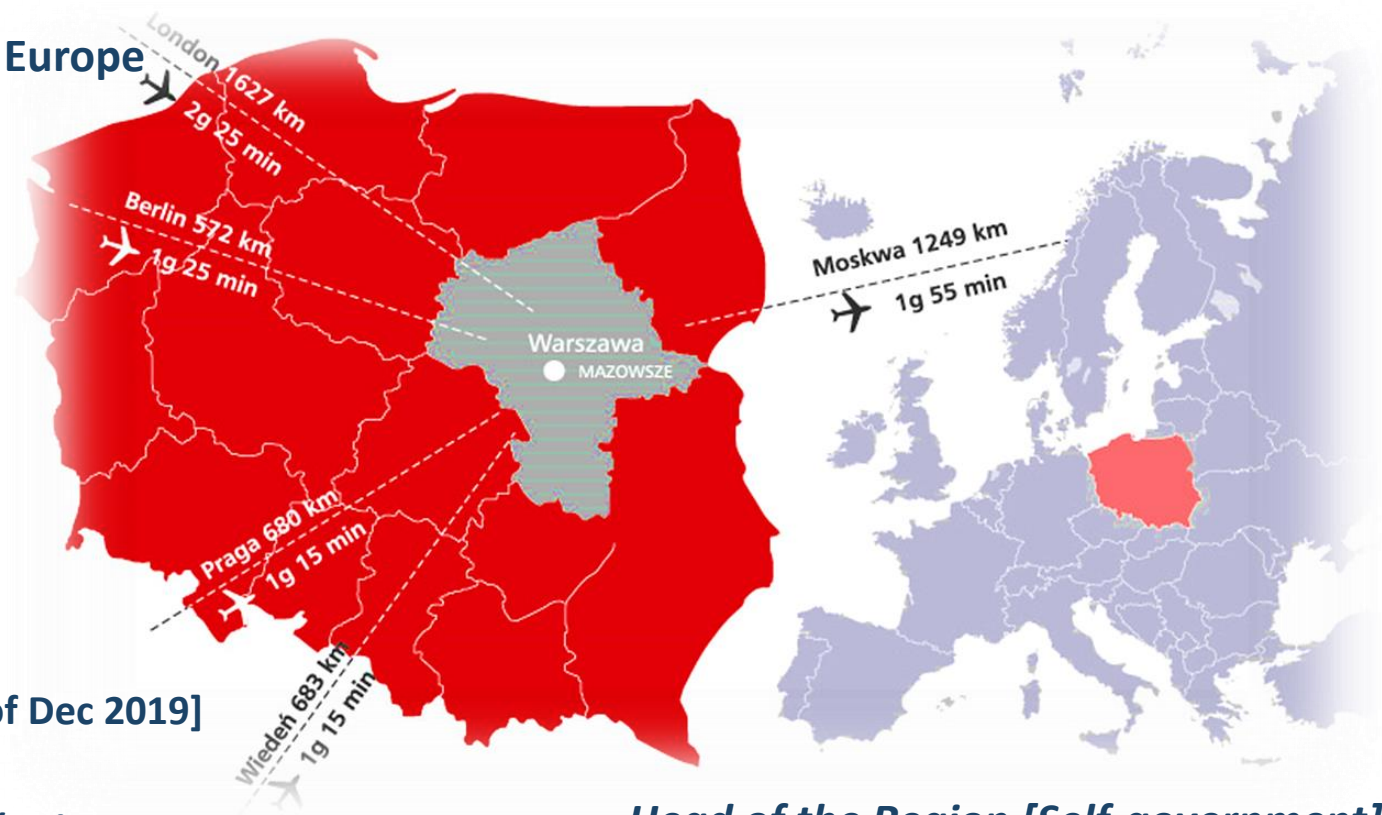
for Investment & Economic Affairs

MASOVIAN VOIVODESHIP

against the background of Europe

- **Area: 35 558 sq km**
[11,4% area of Poland]
- **GDP as of 2018:**
477,857 BN PLN

[130,2 BN USD]
[22,17% national GDP]
- **Per capita: 88 626,00 PLN**
[23 570 USD]
- **Population: 5 423 168 [as of Dec 2019]**
[14% population of Poland]
- **Population density: 151 p./sq.km**



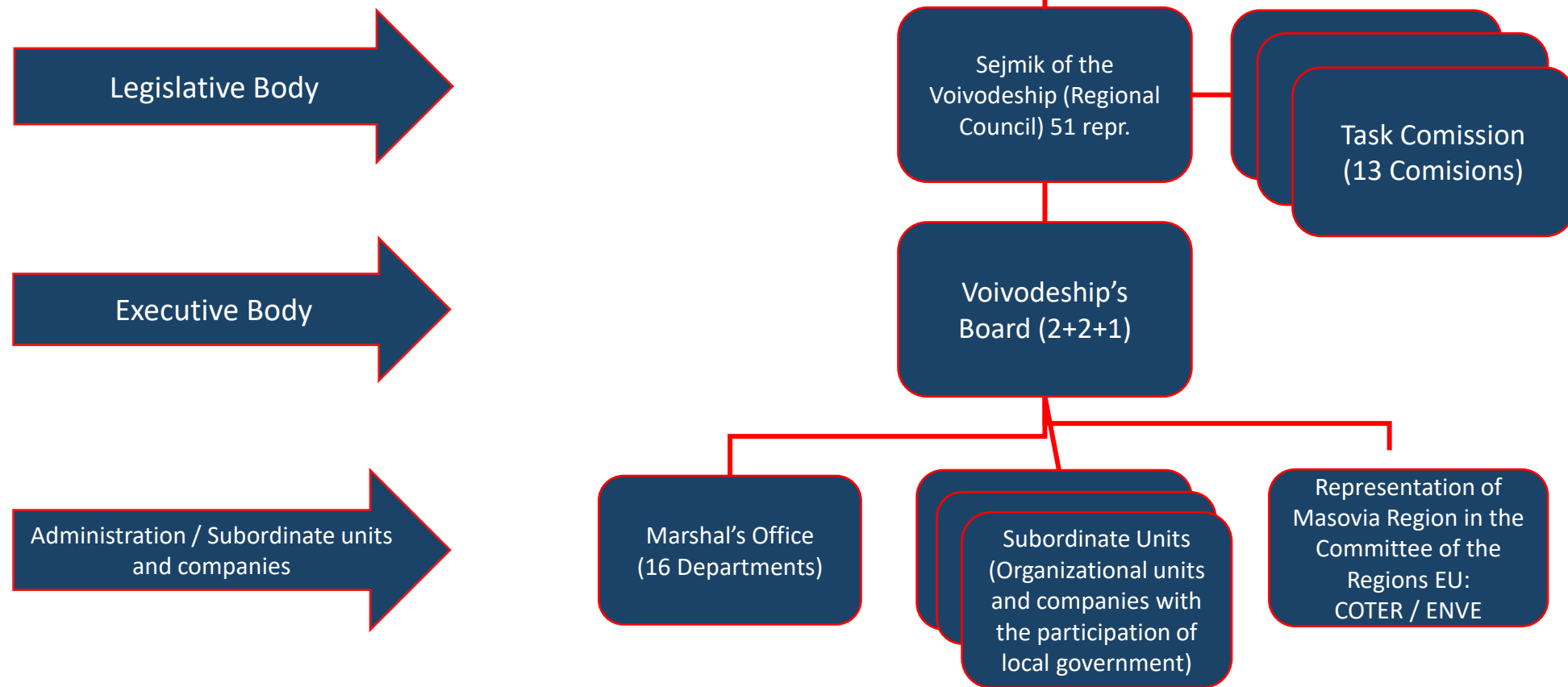
Head of the Region [Self-government]

Mr. ADAM STRUZIK

Marshal of the Mazovian Voivodeship

Source: Statistical Yearbook of Mazowieckie Voivodship, Warsaw 2020,
Statistical Office in Warsaw

Legislative and organisational structure of the Self-Government of Mazowieckie Voivodeship



MAZOVIA IN THE INTERREGIONAL FORUM [cooperation and friendly relations agreements]



- Brussels-Capital Reg.
- Walloon Region



Gyeongsangbuk-do Region



Uusimaa
Region



- Hebei Province
- Shandong Province



Ile-de-France



- Moscow Oblast
- Smolensk Oblast



Zagreb County



Gurajat Province



Bratislava
Capital Region



Central Bohemia Region



Veneto Region



Stockholm Region



Saxony-Anhalt
Brandenburg



Akmola Region



- Kyiv Oblast
- Vinnytsia Oblast
- Tarnopil Oblast
- Lviv Oblast
- Rivne Oblast
- Odessa Oblast

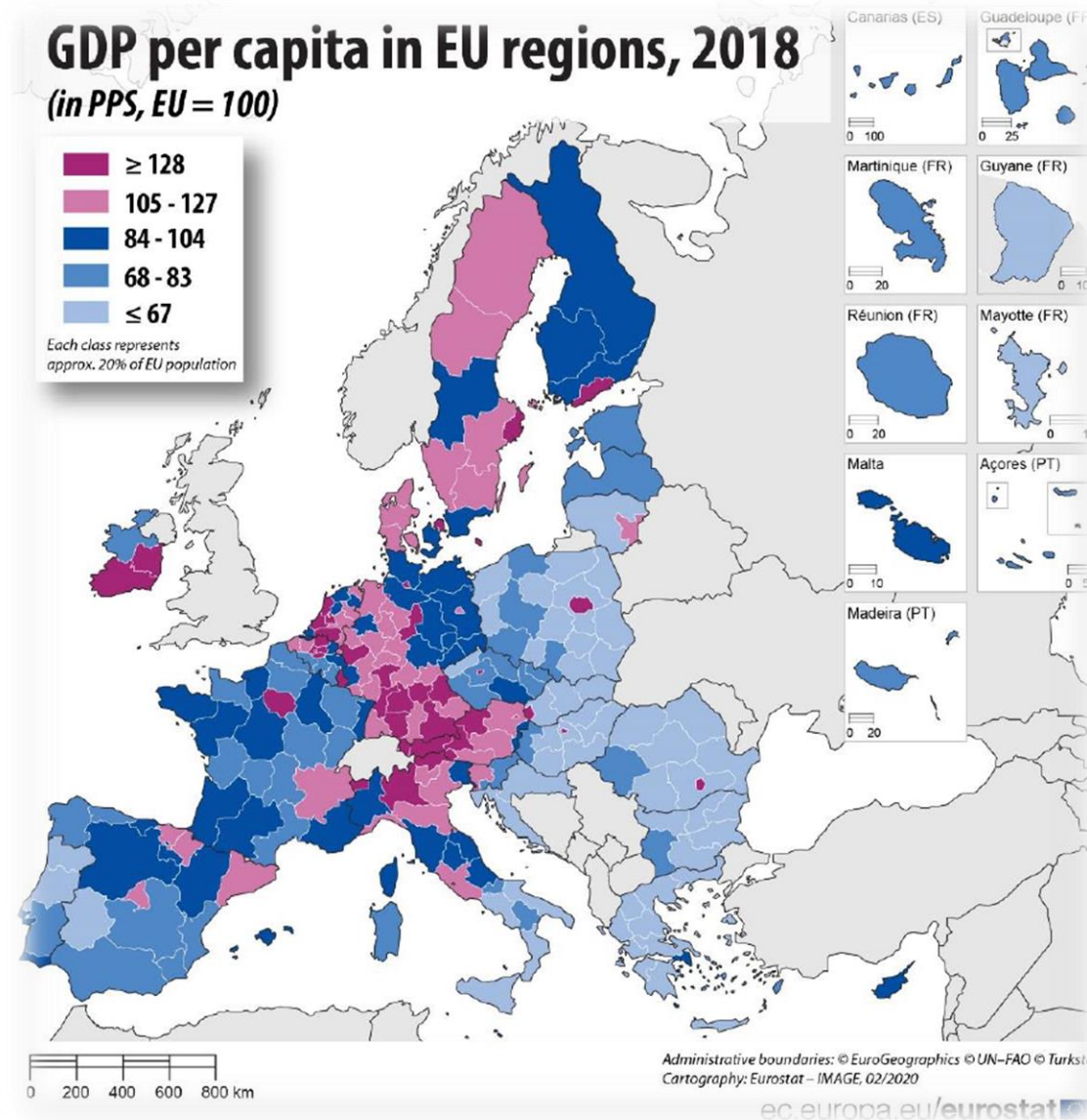


**Marszałek
Województwa Mazowieckiego**

[Marshal of the Mazovian Voivodeship]

Mazowieckie Voivodeship:

GDP per capita compared to other administrative regions of the European Union



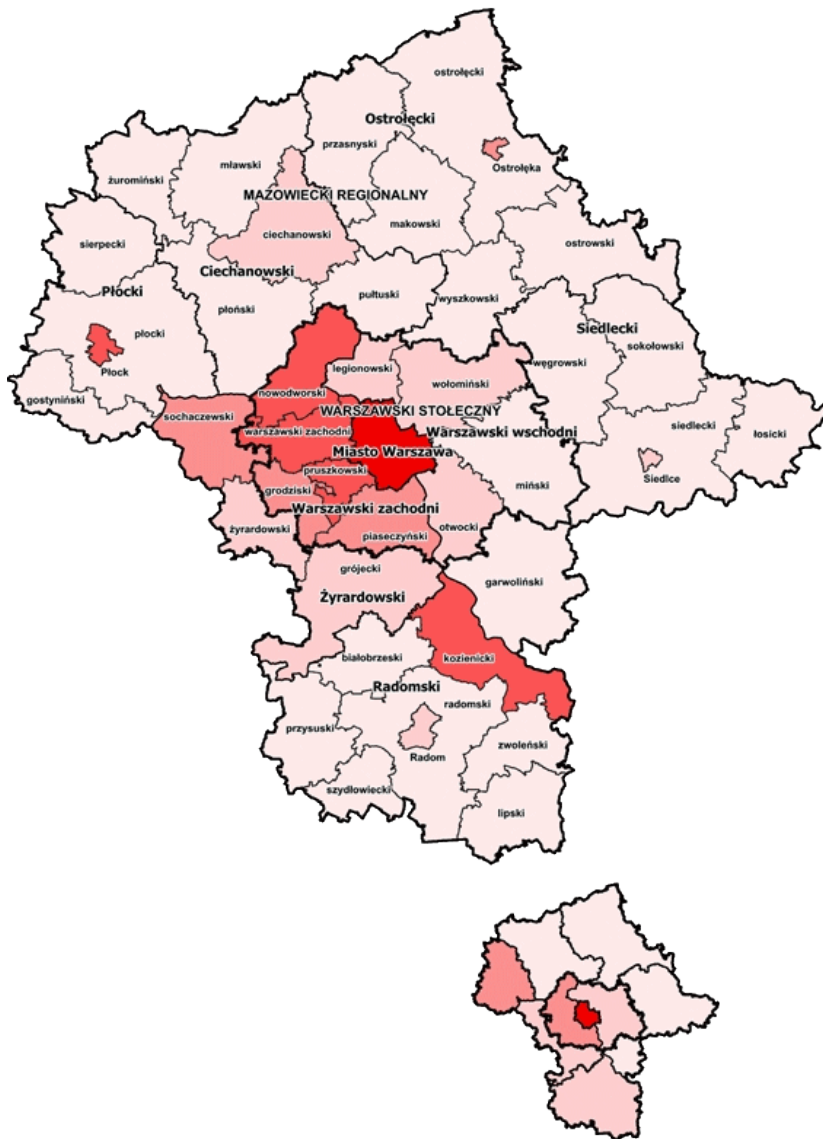
Source: EUROSTAT

- 1) NUTS 2 region – Regional Masovia
- 2) NUTS 2 region – Capital City of Warsaw:

- *nowodworski*
- *legionowski*
- *wołomiński*
- *miński*
- *otwocki*
- *piaseczyński*
- *pruszkowski*
- *grodziski*
- *Western Warsaw*
- *Capital City of Warsaw*



Source: Mazovian Bureau of Regional Planning, as of 2019

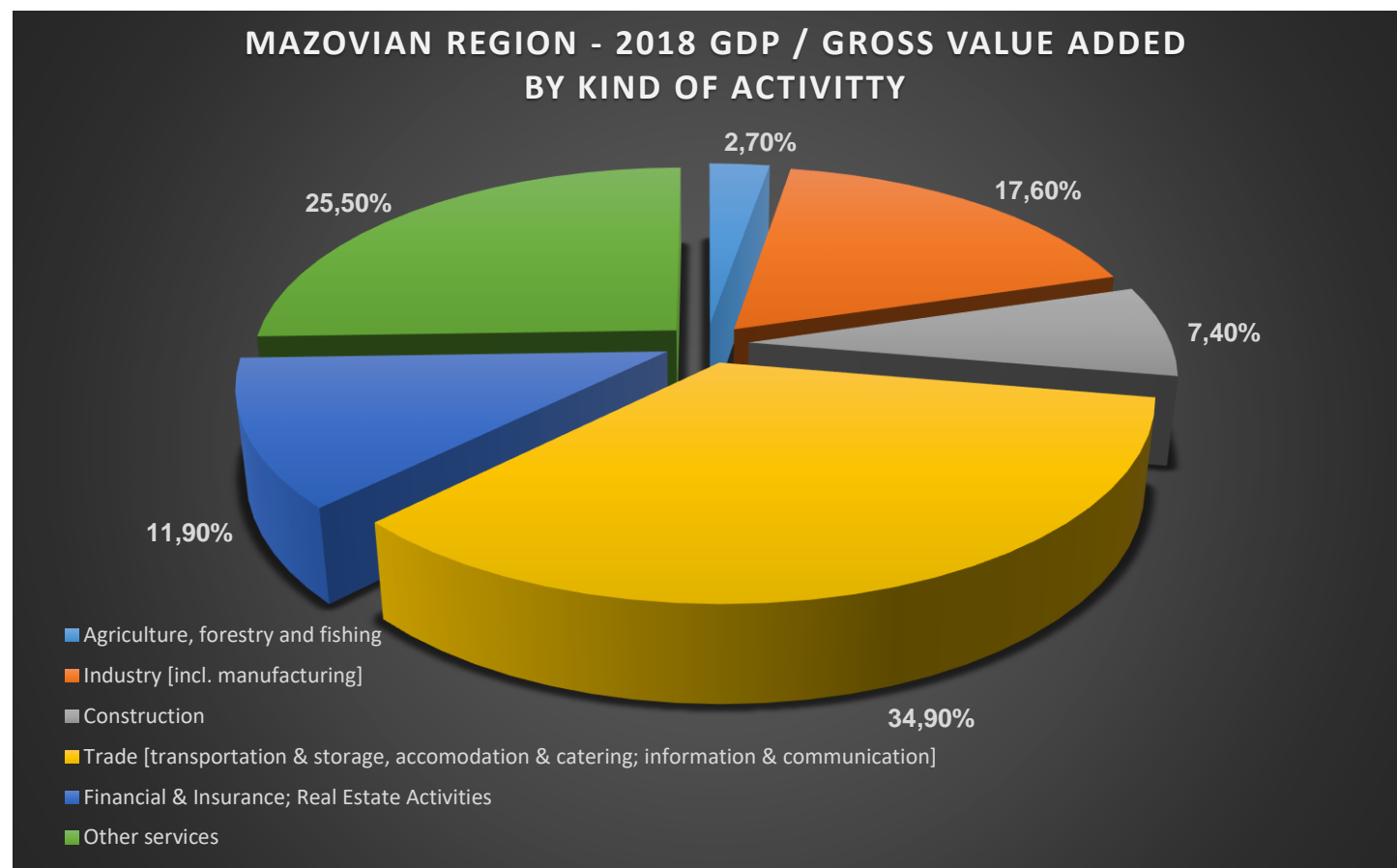


Average monthly gross salary compared to the national average in 2019 (Poland = 100)

- average for the Voivodship – 120,6%
- Warsaw [as a region] – 126,8%
- Regional Masovia - 90,5%
- Capital City of Warsaw – 131.3%

Source: Mazovian Bureau of Regional Planning
on the basis of data from the Central Statistical Office of Poland,
as of 2019

GROSS DOMESTIC PRODUCT [CURRENT PRICES]



*Source: Statistical Yearbook of Mazowieckie Voivodship, Warsaw 2020,
Statistical Office in Warsaw*

LOGISTICS/TRANSPORTATION TEN-T CORE NETWORK

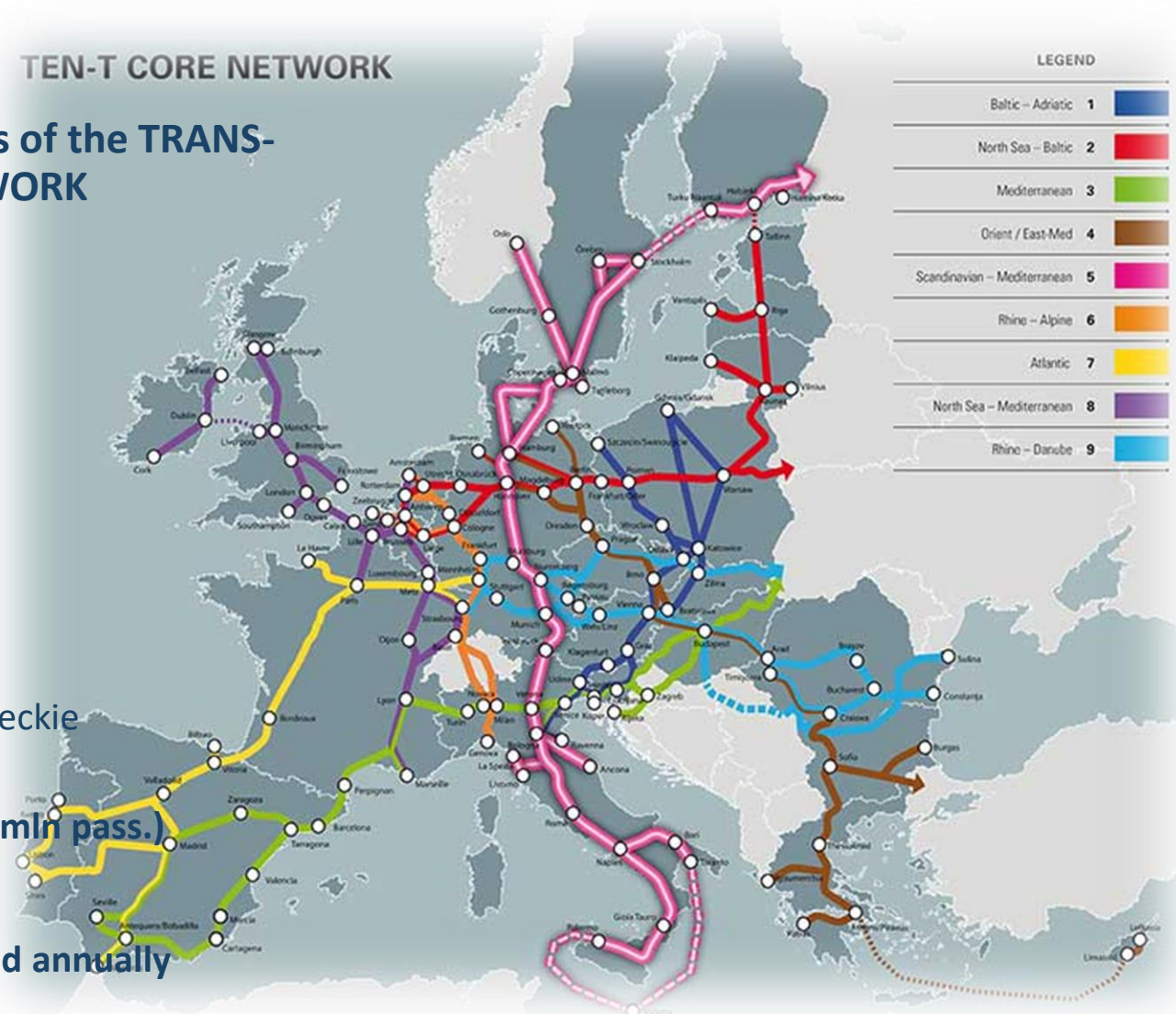
Mazovia is situated on the axis of the TRANS-EUROPEAN TRANSPORT NETWORK

- **Baltic – Adriatic**
- **North Sea – Baltic**
- over **54 000 km of public roads** (biggest number of public roads in Poland) at Masovia
- **1713 km of railroads**

Railroads that are property of the Self Government of Mazowieckie Voivodeship:

1. Masovian Railways Co. Ltd. (63 mln pass.)
2. WKD (Warsaw) (8 mln pass.)

Apx. 71 mln passengers transferred annually



BUSINESS OPPORTUNITIES

Warsaw – operational centre and headquarters of major political, governmental and financial institutions of Poland

854 500 Entities of the national economy in the REGON register, including:

- **295 000** Legal persons and organizational entities without legal personality. and
- **559 500** Natural persons conducting economic activity including **33 200 companies with foreign capital participation;**
It constitutes 40% of the total number of companies with foreign capital operating in Poland
- **16% of Poland's total exports come from Mazovia**

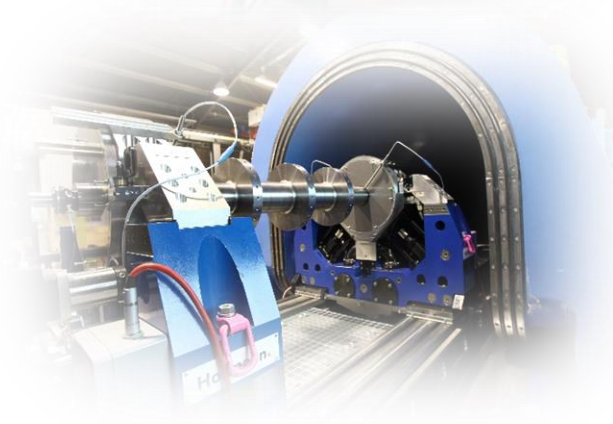
*Source: Statistical Yearbook of Mazowieckie Voivodship, Warsaw 2020,
Statistical Office in Warsaw*



INDUSTRIAL STRUCTURE OF MASOVIA

Leading branches:

- Means of transportation
- Electronics
- Petrochemical industry
- Chemical and cosmetics industry
- Food production
- Agro-food processing
- Machinery
- Wood industry
- Paper production
- Furniture
- Renewable energy



INDUSTRIAL STRUCTURE OF MASOVIA

Other major branches:

- Energy and Energetics
- Steel production
- Precision and metal industry
- Manufacture of tools and armament industry



INDUSTRIAL PARKS AT MASOVIA

- Płock Industrial-Technology Park
- Masovian Science-Technology Park
- Science-Technology Park
(National Nuclear Research Centre) in Świerk
- Center for Advanced Materials and Technologies (CEZAMAT)



KEZO Centre Polish Academy of Science

*Testing centre for instruments and tools for producing and storage of heat, cold, and electricity originating from **Renewable sources of Energy**.*

Testing centre for software and management of Energy generation and consumption.

SCIENCE, RESEARCH & DEVELOPMENT

Masovia's share:

- Over 130 institutes – R&D units
- 50% national potential of R&D
- 40 % general national expenditures for innovation

R&D branches:

- *Pharmaceutics & Biotechnology*
- *Molecular Biology*
- *Chemical industry*
- *Nuclear technologies*
- *Precision physics, Robotics and Automation*
- *Electronic systems*
- *Electron technologies*
- *Applied optics*
- *Energetics*



Highest national potential of education

- 91 higher schools/universities
- 247 511 students at Masovia [*as of 2019*]
- 20,1% general number of students in Poland
(GUS – December 2017)

Major (country leading) universities at Masovia:

- Warsaw University
- Warsaw University of Technology
- Warsaw School of Economy
- Warsaw University of Life Sciences
- Warsaw Medical University



Source: Statistical Yearbook of Mazowieckie Voivodship, Warsaw 2020, Statistical Office in Warsaw

AGRO-FOOD INDUSTRY AT MASOVIA

- **Biggest concentration of the rural area of the country**
Rural area occupies **67%** area of the voivodeship
- **13%** rural area of Poland
- **36%** orchards of Poland
- **Fruits' National Champion**
 - ✓ *Close to **50%** of Polish apples grow at Masovia*
 - ✓ *Close to **40%** fruits export of Poland*
- **Leader in the production of vegetables, meat and milk**



AGRO-FOOD INDUSTRY AT MASOVIA

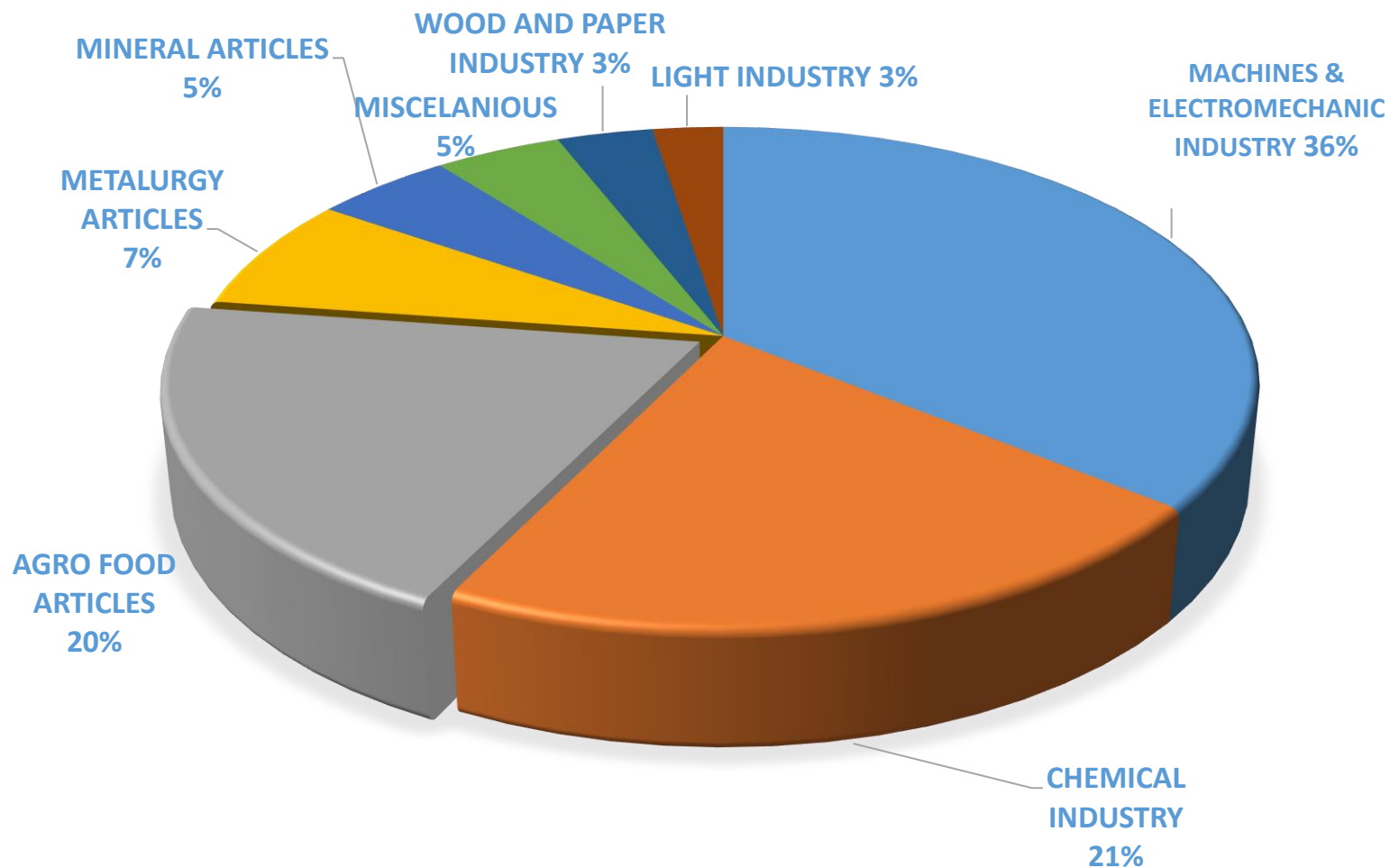


Masovia is a fruits export leader particularly due to high volume of its tree grown fruits export

*In this category, Mazovian entrepreneurs export 27% of [Poland] products intended for **non-EU markets***

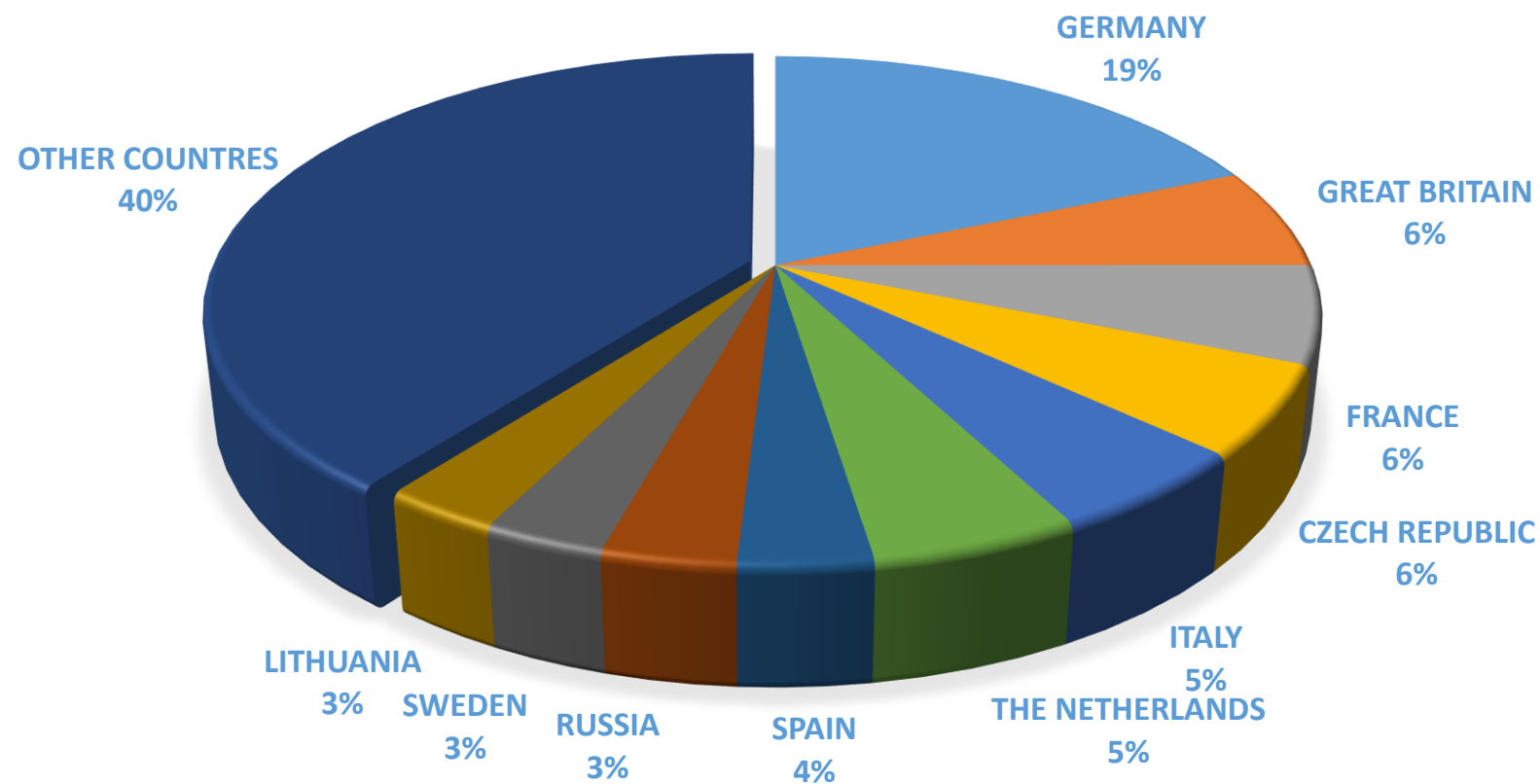
***Remaining part of the fruit production** is consumed at the **EU** and at the **national market** [24% only for Poland] – as processed products or in direct sale.*

INDUSTRIAL STRUCTURE OF MASOVIA – EXPORT BY INDUSTRY



Source: Tresury Administration Chamber in Warsaw, as of 2019

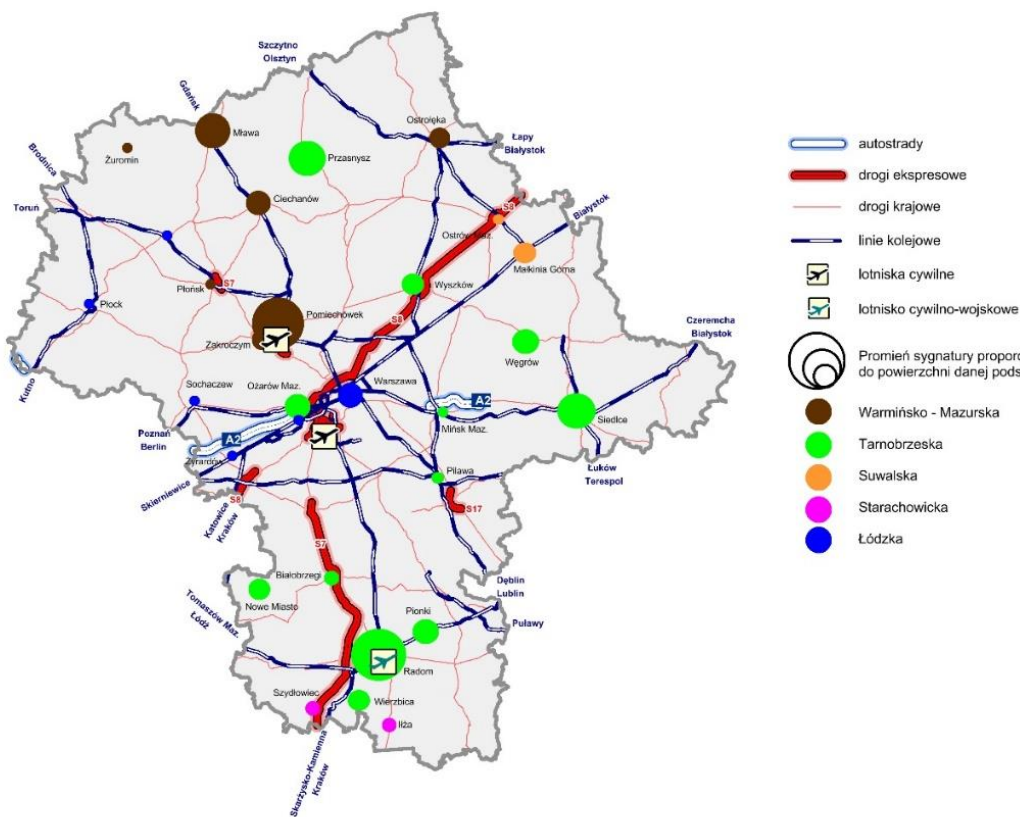
INDUSTRIAL STRUCTURE OF MASOVIA – ESPORT BY DESTINATION COUNTRY



Source: Treasury Administration Chamber in Warsaw, as of 2019

INVESTMENT INCENTIVES OF MASOVIA

Active regions/subregions
Special Investment Zones



5 Special Economic Zones

Self-government incentives and investment offers facilitating foreign economic activity at Masovia:

- **Tax relief** (income tax exemptions)
- **Public support** (35-55% of the investment value)
- Prepared **infrastructure** supporting economic investment

Infrastructural adaptation – according to investment requirements

- Application of **EU support**
- Attractive solutions **SME**

Formally, the entire territory of Poland should be treated as a "Special Economic Zone,"

„Law on supporting of new investments” of 10th May 2018

2019 Operational data:

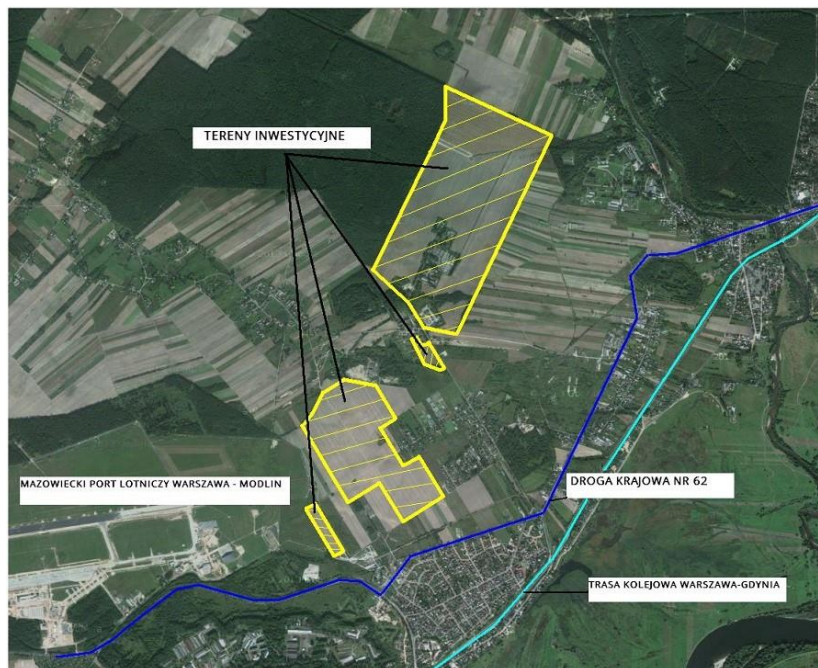
- ## Technically:

- **2 500 m runway**
- **Taxi platform: 10+2 stations**
- **ILS (Transport and Logistics) cat. II**



ECONOMIC DEVELOPMENT ZONE [Nowy Dwór / Pomiechówek]

- Available investment area: 119 ha
- Public support – income tax exemption
- Support value pending on the size of entrepreneurship:
from 35 to 55% of the investment value
- Support duration: 15 years



Miasto: Pomiechówek
Obręb ewidencyjny: nr 15 m. Nowy Modlin
Skala 1:15000

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