

**SYTUACJA SPOŁECZNO-GOSPODARCZA
WOJEWÓDZTWA MAŁOPOLSKIEGO W 2011 R.**

*SOCIO-ECONOMIC SITUATION
OF THE MAŁOPOLSKIE VOIVODSHIP IN 2011*

Socio-economic situation of the Małopolskie voivodship in 2011

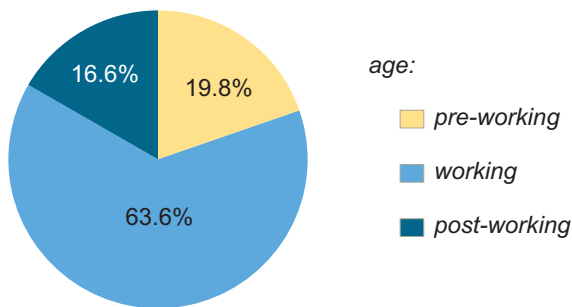
Society

POPULATION

According to NCP2011 (as of 31 III 2011) 3.3 mln people lived in Małopolskie voivodship, what placed the voivodship on the fourth position in Poland, after the: Mazowieckie (5.3 mln), Śląskie (4.6 mln) and Wielkopolskie (3.4 mln). In the Małopolskie voivodship the population density is one of the highest in the country and it amounts to 220 persons/km² (the country average - 123 persons/km²). Females constitute here 51.5% of total population. Since 2000 the feminization rate has remained at the same level, i.e. 106 females per 100 males (in Poland - 107).

The pre-working age population (aged 0-17) accounted (according to census data) for 19.8% of total population. The share of the working age population (aged 18-59/64) 63.6%, and the share of the post-working population (aged 60/65 and more) 16.6%. For several years the percentage of the pre-working age population has diminished while the percentage of post-working population has systematically augmented, what shows the slow process of aging of the society.

Graph 1. Share of population by economic age groups in total population in 2011
As of 31 III



Since 2000 we have observed an upward tendency of the population in Małopolskie voivodship. Compared to the NCP 2002 population increased by 1.0%. It was influenced by recorded in 2000-2010 positive natural increase and positive internal and external net migration. In 2011, once again, the natural increase was positive and it amounted to 1.7 per 1000 residents (in Poland 0.3), and was slightly lower than in 2010.

In the discussed year 35,5 thous. children were born in the Małopolskie voivodship. The ratio of live births amounted to 10.6‰ towards 11.3‰ a year ago.

Deaths are the next factor of vital statistics affecting the size and structure of population. In Małopolskie voivodship in the discussed year 29.7 thous. people died. The ratio of deaths shaped at the level of 8,9‰ towards 9.0‰ the year before.

In 2011 on the area of the voivodship 18.5 thous. marriages were contracted, i.e., less by 9.3% than in 2010. Simultaneously 4.9 thous. marriages were dissolved by divorce. The ratio of intensity of marriages was 6.2 per 1000 population and the ratio of intensity of divorces was 1.5 divorces per 1000 population.

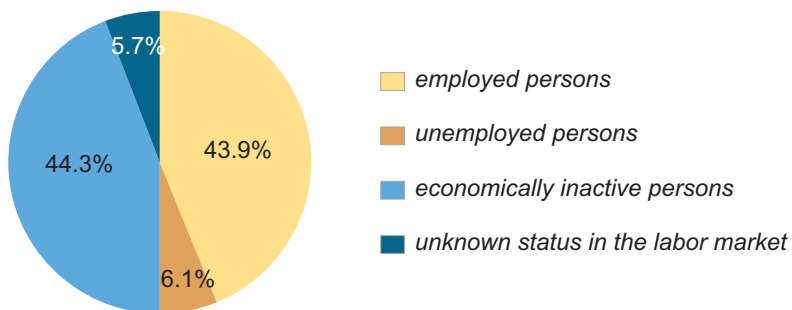
Positive permanent net migration influenced the increase of the population, amounting in 2011 to 3.7 thous. persons. From urban areas population emigrated (minus 1.4 thous. persons), and on rural areas - immigrated (plus 5.2 thous. persons).

LABOUR MARKET

According to NCP, in 2011 in Małopolskie voivodship there were 2.8 mln people aged 15 and more, of which 1.4 mln economically active persons - the population constituted by employed persons (about 88%) and unemployed persons. There were 1.2 mln economically inactive persons.

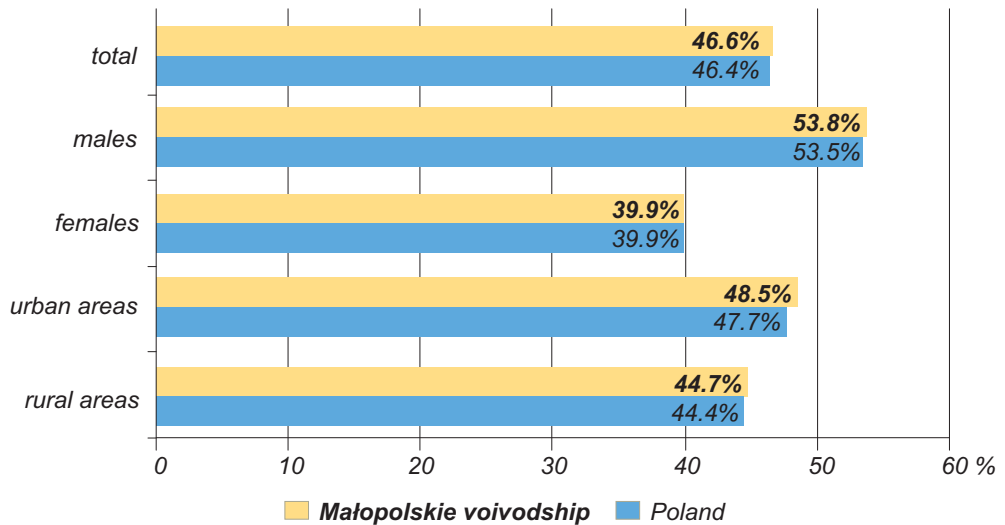
Graph 2. Structure of population aged 15 and more according the labor market status in 2011

As of 31 III



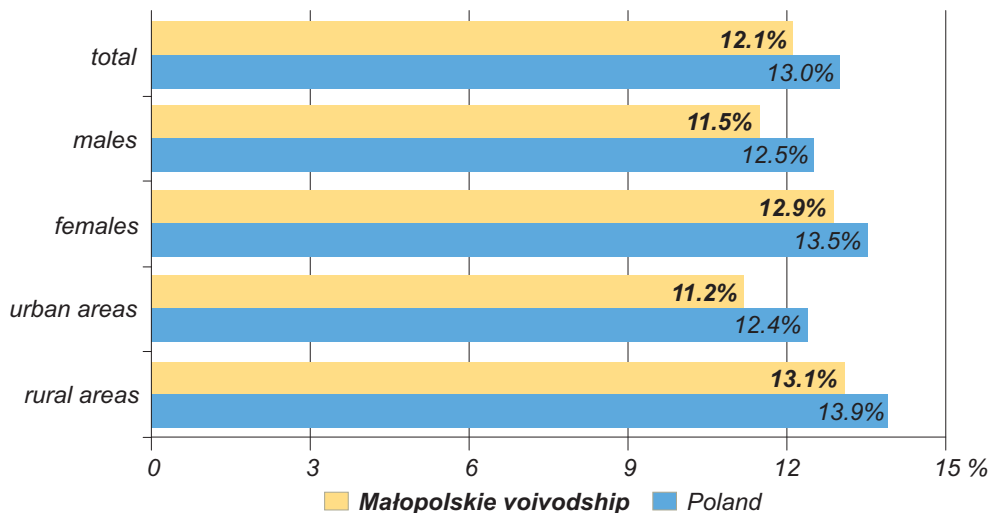
The activity rate amounted to 53.0% (in Poland 53.5%), however, the employment rate 46.6% (in the country 46.4%). Among the males the employment rate amounted 53.8% (in the country 53.5%), among females, as well as in the country, 39.9%.

Graph 3. Employment rate by sex and place of residence in 2011
As of 31 III



In 2011 the unemployment rate by NCP reached 12.1% (in Poland 13.0%). Among women the unemployment rate amounted to 12.9% (in Poland 13.5%) and among men 11.5% (in the country 12.5%). In rural areas the unemployment rate amounted to 13.1% (in Poland 13.9%), in urban areas 11.2% (in the country 12.4%). The unemployment rate for working age population amounted to 12.3%.

Graph 4. Unemployment rate by sex and place of residence in 2011
As of 31 III



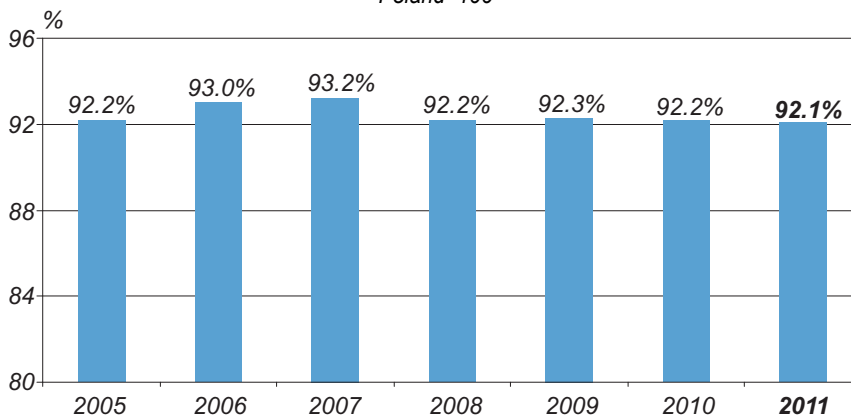
Work in Małopolska was one of safer in the country. One of the lowest accident rate in Poland was registered here. At the end of 2011 in Małopolskie voivodship the number of persons working in hazardous conditions calculated per 1000 paid employees of total surveyed amounted to 78.9 and it was higher than at the end of 2010 (74.3).

In 2011 the number of persons injured in accidents at work¹ amounted to 5.9 thous. persons (as well as year before). 1.7 thous. compensations were paid due to accidents at work and occupational diseases on total amount of 5202.8 thous. zł. Occupational accidents benefits accounted for 96.5% of all benefits and 4715.7 thous. zł were allocated for them, i.e., 90.6% of the sum paid. An average cost of one occupational accident and occupational disease benefit increased and amounted in 2011 to 3058.7 zł (towards 2756 zł in 2010).

WAGES AND SALARIES

In the Małopolskie voivodship in the discussed year average monthly gross wages and salaries shaped at the level of 3134.06 zł, i.e., by 5.4% higher than the year before. So there has been a slight acceleration in the rate of growth of average salaries in 2011, as a year earlier, an increase of 3.9%. In public sector wages and salaries were bigger (3767.76 zł) than in private sector (2872.48 zł). In Poland the average monthly gross wages and salaries amounted to 3403,51zł. For four years average monthly gross wages and salaries constituted about 92% of the country average.

Graph 5. Average monthly gross wages and salaries
Poland=100



¹ Registered during the year; excluding accidents on private farms in agriculture.

It is worth to mention, that a relatively high increase of average wages and salaries occurred while paid employment also increased. In 2011 paid employment in the Małopolskie voivodship amounted to 673.1 thous. persons and in relation to the previous year it was higher by 2.0%.

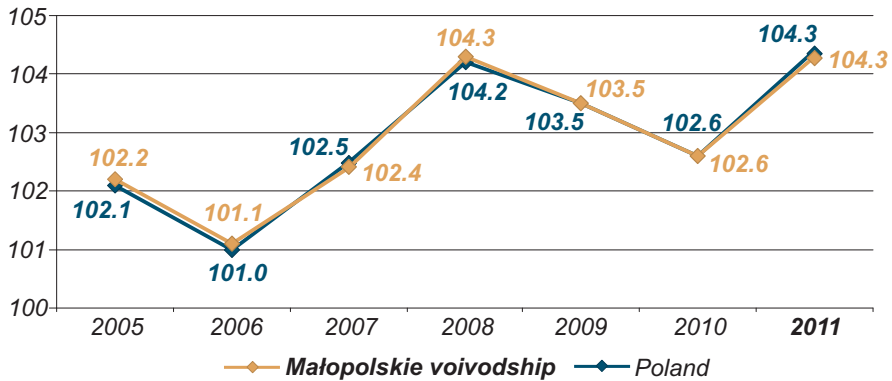
Compared to year 2010 increased the average monthly retirement and disability in Małopolskie voivodship. In the discussed year it achieved the level of: 1622.90 zł (from ZUS - the Social Insurance Fund) and 955.17 zł (from KRUS - the Agricultural Social Insurance Fund).

PRICES

In the Małopolskie voivodship in 2011 a similar than in Poland 4.3% increase of prices of consumer goods and services occurred. The highest increase of prices was recorded in such fields as transport (by 8.0%), food and non-alcoholic beverages (by 6.0%), housing, water, electricity, gas and other fuels (by 5.1%) as well as health (by 4.5%). The decrease of prices was recorded in clothing and footwear (by 0,8%), and recreation i culture (by 0,4%). Within the space of 2005-2011 analogous changes of indices of prices were recorded in the Małopolskie voivodship and in Poland.

Graph 6. Indices of prices of consumer goods and services

Previous year=100



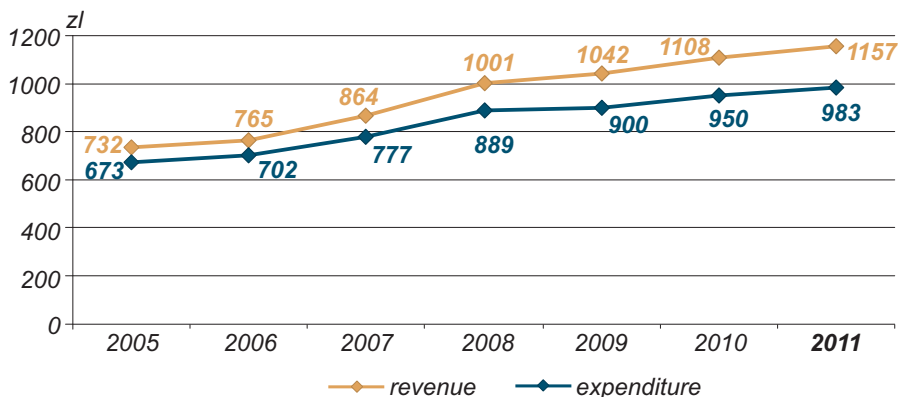
HOUSEHOLD BUDGETS

In the discussed year the survey of household budgets included 3171 households, i.e. 8.5% (as a year before) of all surveyed households in the country. In Małopolskie voivodship the average number of persons in household amounted to 2.95 person (in 2010 – 3.06), in the country 2.87. Disposable income has a significant influence on the quality of life of household

members. In the Małopolskie voivodship an average monthly nominal disposable income in households per capita amounted to 1156.79 zł and in relation to 2010 it increased by 49.25 zł. However, it was still less (by 70 zł) than the available income of a statistical Pole.

The level of total average monthly expenditures of households per capita amounted to 982.59 zł, of which on consumer goods and services – slightly more than 950 zł (by about 21 zł less than in the country). In Małopolskie voivodship monthly expenditure incurred by 1 person were approximately 33 zł lower than in Poland. Compared to 2010 the voivodship capita expenditure increased by 3.5%.

Graph 7. Average monthly available income and expenditures of households per capita



Year in, year out, the furnishing of households with selected durable goods improves, especially with personal computers with access to the Internet, satellite television equipment (including cable television) mobile phones as well as household appliances. Statistically, each household surveyed in 2011 possessed a refrigerator, a television set, a washing machine, a mobile phone and every second possessed a personal computer with access to the Internet, a passenger car, satellite television equipment, a microwave oven and a digital camera.

MUNICIPAL INFRASTRUCTURE

Last years the infrastructure in the Małopolskie voivodship has been modernized. The water-line, sewerage and gas network was developed. The length of the distribution water-line network in Małopolskie voivodship amounted to 17.7 thous. km and in comparison with 2010 it went up by 0.4%. The length of the sewerage network (including collectors) in the discussed period exceeded 10.6 thous km and it was longer by 6.4%.

The length of the gas-line network - 22.2 thous. km - increased in relation to 2010 by 0.5%. The number of consumers of gas from the gas network reached 695.9 thous., what means an increase in comparison with 2010 by 2.1 thous. people.

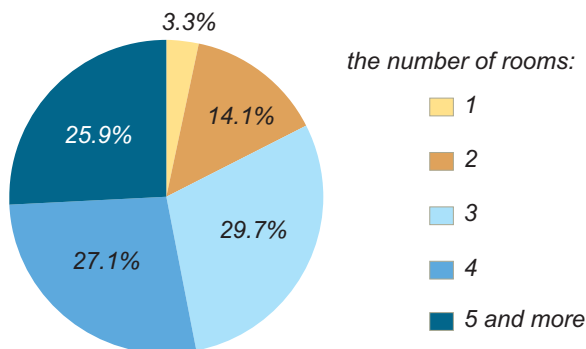
The amount of municipal waste selectively collected increased almost by 25 thous. tonnes in relation to 2010. Of total amount of collected waste (113.9 thous. tonnes) 27.1% accounted for glass, 26.2% biodegradable waste, 17.5% plastics and 13.3% waste-paper.

In 2011 in the Małopolskie voivodship the length of hard surface public roads equaled 24.0 thous. km, i.e., more by 1.3% than in 2010, of which improved - 21.5 thous. km.

DWELLINGS

According to NCP2011, dwelling stocks of the Małopolskie voivodship amounted to 1079.5 thous. dwellings. Dwelling stocks of Małopolskie voivodship constituted 8.0% of the country dwelling stocks. Compared to census in 2002 the number of dwellings increased by 9.5%. An average usable floor space of a dwelling amounted to 74.4 m². In urban areas the average usable floor space of a dwelling amounted to 62.4 m², in rural areas 91.0 m².

Graph 8. The structure of dwelling by number of rooms in 2011
As of 31 III



In 2011 the average number of rooms in 1 dwelling amounted to 3.86. At least it was the one room dwellings (3.4% of all dwellings). The most dwellings had 3 rooms – 29.7%. Four-room and five-room dwellings were also a significant part (in sequence: 27.1%, 25.9%).

The most dwellings were owned by individuals – 75.3%. Housing associations owned a 12.3% of all dwellings (including 11.2% were condominiums).

Compared to previous census improved housing facilities the technical and sanitary installations. In 2011, 96.3% of the dwellings was equipped with a water supply. How water had 89.6% of dwellings, and the gas network 70.3%. Central heating was in 78.8% of the dwellings in voivodship.

In 2011 in Małopolskie voivodship 12.6 thous. dwellings were completed, i.e., by 3.1% more than the year before. In Poland, at that time there was a decline of 3.5% of the number of dwellings provided for use in relation to the previous year.

EDUCATION²

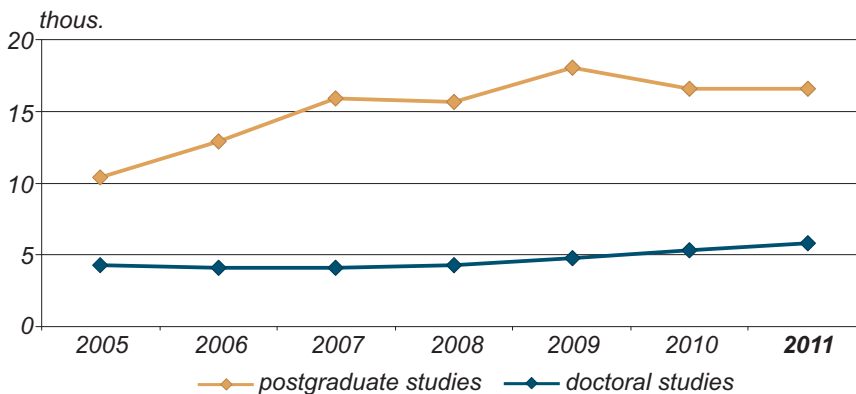
At the beginning of the 2011/12 school year in the Małopolskie voivodship there were:

- 2001 pre-primary education establishments, attended by 104.4 thous. children (of which 986 nursery schools - by 77.7 thous. children),
- 1465 primary schools (202.9 thous. pupils),
- 744 lower secondary schools (110.3 thous. pupils),
- 160 basic vocational schools (20.4 thous. students),
- 201 general secondary schools (including supplementary) and 28 specialized secondary schools (56.5 thous. and 1.8 thous. students respectively),
- 188 technical secondary schools, including supplementary technical secondary and general art schools leading to professional certification (51.0 thous. students),
- 221 post-secondary schools (26.8 thous. students).

Moreover, 17.7 thous. persons attended 271 schools for adults. Simultaneously 207.6 thous. students educated in 33 higher education institutions. In the 2011/12 academic year there were less students - by 1.8% in relation to the 2010/11 school year.

In the discussed period the group of students of postgraduate studies diminished (by 0.3%), however the interest in doctoral studies grew (by 9.0%).

Graph 10. Students of postgraduate and doctoral studies



Data for the 2011/12 school year reveal a general drop of the number of pupils in primary and lower secondary schools, what is caused by educating generations from "population depression". These generations enter also upper lower secondary schools, hence a recorded decrease of the number of students also in all types of these schools. The most

² Data from the Educational Information System, administered by the Ministry of National Education - with the exception of the higher education institutions.

popular among graduates of lower secondary schools are still general secondary schools, attended by over 45.4% of first class students of upper lower secondary schools, i.e., almost 18 thous. young people.

The equipment of schools with computers has systematically improved, of which also with Internet access. The best equipped with computers were: primary schools (in 97%), lower secondary schools (in 81%) and technical secondary schools (in 81%).

HEALTH CARE

The residents of the Małopolskie voivodship were provided with medical care by in-patient health care institutions, out-patient health care institutions and private practices of physicians.

In 2011 in the Małopolskie voivodship (as of 31 XII) operated: 69 general hospitals, 1620 health care institutions and 262 medical practices, which had contracts signed with the National Health Fund for rendering defined services. The number of professionally active physicians amounted to 7.3 thous., dentists - 1.3 thous., and nurses - 16.4 thous.

The number of consultations per capita provided by physicians in the out-patient health care amounted in 2011 to 6.8, and by dentists - 0.9. It means that a statistical resident of the Małopolskie voivodship during the year received on average almost 7 medical consultations and 1 dentist consultation. Out-patient health care institutions in the Małopolskie voivodship (1.6 thous.) accounted for 8.5% of all such facilities in Poland, and medical personnel - about 9-10% of the country personnel.

The average length of stay in general hospitals has decreased over the past few years (2000 – 9.8 days, 2005 – 7.2 days, 2010 – 5.9 days, 2011 – 5.8 days).

At the end of 2011 34 health resort sanatoria were functioning (including 2 health resort sanatoria for children), and moreover 7 health resort hospitals (including 3 health resort hospitals for children), i.e., by 1 more than the year before.

The sale of medicines and medications, as of the end of 2011, was run by 1083 public pharmacies and 112 pharmaceutical outlets. The number of pharmacies increased during the year by 92.

Within the emergency medical services, ambulance emergency rescue teams intervened 215.5 thous. times, providing health care to 216.7 thous. people. In 22 hospital emergency wards 146.0 thous. patients were cured in the form of day treatment, whereas 469.8 thous. out-patients received 476.4 thous. consultations.

SOCIAL WELFARE

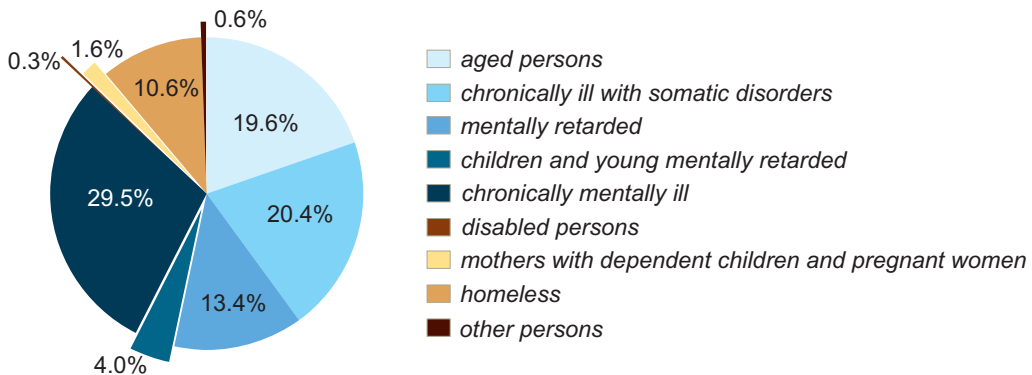
At the end of 2011 in the Małopolskie voivodship there were 72 round-the-clock care and education centers, in which 1223 residents were staying and 266 volunteers were working. In comparison with 2010 there was an increase by 8 centers, the number of residents increased by 69, and the number of volunteers was the same.

Simultaneously in the Małopolskie voivodship there were 217 day-support centers with 13,0 thous. children and youth benefiting from them. Since 2005 the number of such types of centres almost doubled and the number of persons benefiting from them increased by about 57%. But in 2011 the number of centres dropped by 6 and the number of residents - by 728 in annual terms.

At the end of the discussed period in the Małopolskie voivodship there were 2032 foster families which provided care for 2960 children (up to age 18). It accounted for 5.4% foster families and 5.5% children staying in them in the country scale. In comparison with 2010, the decrease of the number of foster families occurred both in Poland and in the voivodship (by: 0.1% and 5.0% respectively). The number of children in foster families increased by 0.7% in Poland, however decreased by 4.1% in Małopolskie voivodship.

At the end of December 2011 8915 residents stayed in 145 stationary social welfare homes and facilities of the Małopolskie voivodship. The number of places in such facilities amounted to 27.6 per 10 thous. population. Among residents of stationary social welfare facilities the most were chronically mentally ill - 2633 (29.5%) and chronically ill with somatic disorders - 1815 (20.4%).

Graph 11. Structure of residents of social welfare facilities by groups of residents in 2011



CULTURE

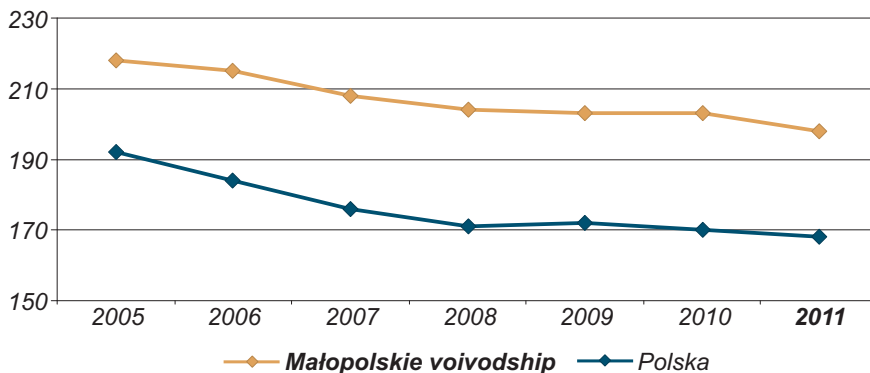
Malopolskie voivodship takes special position on the cultural map of Poland: it is one of the country's leaders both in the resources of cultural institutions and the number of participants in region's cultural offer. The most important centre of cultural life remains Kraków, but year by year other cities of the region keep on improving in this respect.

In 2011 in Malopolskie voivodship there were 112 museums. As regards their amount, Malopolskie voivodship came the country's second-best, just after Mazowieckie (116). Similarly to the past years, the number of museum and exhibition visitors was still on the increase, from 6.5 mln in 2010 to 8.2 mln in 2011. Calculated per 1000 population it amounted to 2461 persons (in 2010 – 1945 persons). In 2011 the museums of Malopolskie voivodship constituted 14.4% of total in Poland and accumulated 1/3 of total of museum and exhibition visitors in the country.

In 2011 in Malopolskie voivodship 66 art galleries and art salons conducted activity, organizing a total of 743 exhibitions in 1299 expositions. Those were visited by 557.7 thous. people, of which 1/5 visited open-air exhibitions. Compared with last year, the number of art galleries' and art salons' visitors increased by 27.7%.

The most common cultural institutions are libraries. At the end of 2011 in Malopolskie voivodship there were 747 public libraries (including branches), which constituted 9.0% of all such institutions in Poland, and 241 information and library establishments³ (12.4% of total in Poland). In comparison with last year the number of public libraries in Malopolskie voivodship decreased by 12. The number of borrowers of public libraries and the number of loans per borrower remains at similar level for a couple of years.

Graph 12. Public library borrowers per 1000 population



As of 31 XII 2011 in the Malopolskie voivodship operated 15 theatres and music institutions. In comparison with 2010, the number of auditorium seats and the number of

³ Scientific, specialised, pedagogical and specialised-fiction libraries, scientific, technical and economical information centres and scientific societies

performances increased and so did the audience on the shows put on in the theatres and music institutions of the voivodship.

At the end of 2011, operated 46 fixed cinemas. This number has remained unchanged since last year. The number of audience subtly decreased compared with past year, however it increased more than twice as concerns films of polish production.

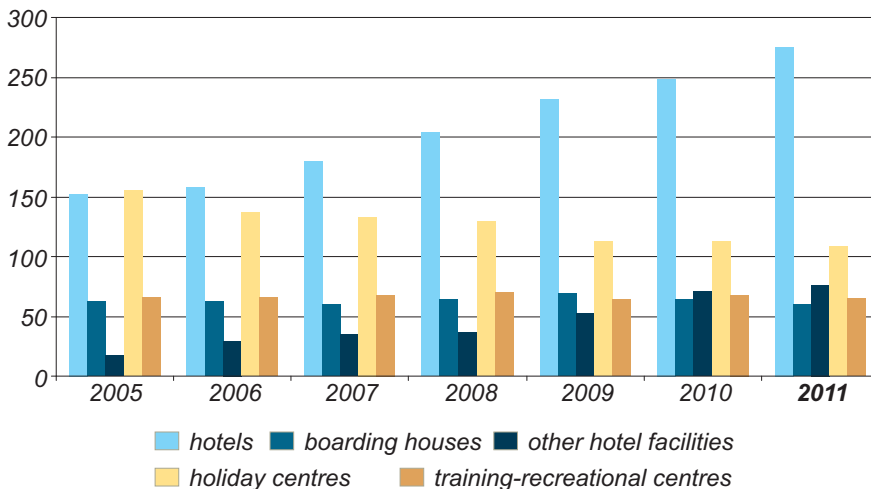
Those which play an important role in facilitating a common access to the culture are regional culture centres and establishments, clubs and community centres conducting various activities for cultural dissemination and development. Malopolskie voivodship stands out from others as regards the amount of such institutions. In 2011, 416 culture centres and establishments, clubs and community centres conducted activity, organizing a total of 23.3 thous. various events, 1.4 thous. art teams, 1.6 thous. groups and 1.5 thous. courses.

TOURISM

The Małopolskie voivodship is one of the regions in Poland where tourism is the most developed. It is connected with cultural heritage as well as richness of landscape and biodiversity of this area. As of the end of July 2011 the boarding facilities of tourism in the voivodship included 880 facilities, offering 73.3 thous. beds in total, what accounted for 12.1% of the country boarding facilities.

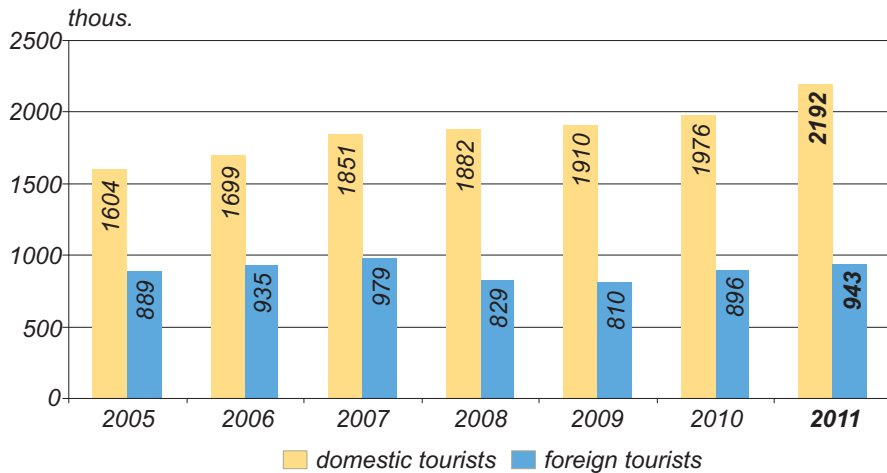
In comparison with 2010 a upward tendency of the number of facilities was observed (rise by 0.6%), with simultaneous increase (by 4.8%) of the amount of beds. In comparison with 2005 an upward tendency of the number of hotels, and of other hotel facilities. Downward tendency was observed of the amount of holiday centres.

Graph 13. Collective tourist accommodation establishments by type of facilities
As of 31 VII



In 2011, in relation to 2010, the number of nights spent was higher by 5.3%. There were 3135.4 thous. persons accommodated, i.e. more by 9.2% than years ago, while foreign tourists - 943.3 thous., i.e. more by 5.3%.

Graph 14. Tourists accommodated in collective tourist accommodation establishments



At the end of July 2011 in collective tourist accommodation establishments there were: 335 restaurants, 297 bars and cafes, 288 canteens and 65 food stands. In comparison with the end of July 2010 there were more restaurants, bars and cafes as well as food stands, whereas less canteens.

Economy

ENVIRONMENTAL PROTECTION

As regards the area (15183 km²), the Małopolskie voivodship has 12th position in the country, before the voivodships: Lubuskie, Śląskie, Świętokrzyskie and Opolskie. It is situated on upland and mountain sites, what considerably contributes to its tourist attractiveness, but also obliges to special care of natural environment.

Legally protected areas possessing unique environmental value constitute more than a half of the area of Małopolska (as of the end of 2011 - 52.1%), of which protected landscape areas - 37.7%, landscape parks - 11.6%, national parks - 2.5%.

The number of plants generating substantial air pollution (emitting particulates, gases or particulates and gases at the same time) decreased from 145 at the end of 2010 to 139 at the end of 2011. In compare to 2010, the emission of industrial particulates from the above

mentioned plants decreased by 0.3% and amounted to 3.9 thous. tonnes (6.8% of the country's quantity), and the emission of gases (excluding carbon dioxide) increased by 2.7% and amounted to 134.7 thous. tonnes (constituting 8.1% of the emission in Poland).

In 2011 water withdrawal for needs of the national economy and population slightly decreased in relation to the previous year. Within 2010 in the voivodship it amounted to 541.9 hm³ of water, i.e., less by 1.0% than in 2010. Water consumption for needs of the national economy and population within the space of the last years has increased to the level of 496.3 hm³, i.e. more by 0.7% than in 2010. 66.5% water was used by industry, exploitation of water-line system – 22.9%, and agriculture and forestry - 10.6%.

Simultaneously 588.0 hm³ of waste water were discharged into waters or into the ground, what means an increase by 5.5% in relation to 2010. Almost 84% of waste water were discharged directly by plants, and remaining 16.3% - by sewerage system. More than a half (306.9 hm³) of discharged waste water required treatment, of which 98.5% were treated. In Malopolskie voivodship there were 315 waste water treatment plants, of which 235 municipal waste water treatment plants, servicing approximately 56.9% of the population.

Total amount of waste (excluding municipal waste) landfilled up to now (accumulated) within the decade showed a declining tendency and at the end of 2011 equaled 141.2 mln tonnes (9.3 thous. tonnes/km²), what accounted for 8.5% of total quantity of waste landfilled in the country.

Waste generated during the year (excluding municipal waste) amounted to 6.7 mln tonnes (an increase in relation to 2010 by 9.3%). It accounted for 5.4% of the country-wide waste. The voivodship comes in fourth in Poland (after the Śląskie, Dolnośląskie and Łódzkie) with such amount of waste. Generated waste was recovered in 91.5%, treated in 6.6%, and temporarily stored on plant grounds - in the last part (1.9%).

Outlays on fixed assets in environmental protection in the discussed year - 795.9 mln zł constituted 6.5% of domestic outlays. However, on fixed assets in water management the voivodship destined 596.1 mln zł, i.e. 19.0% of domestic outlays.

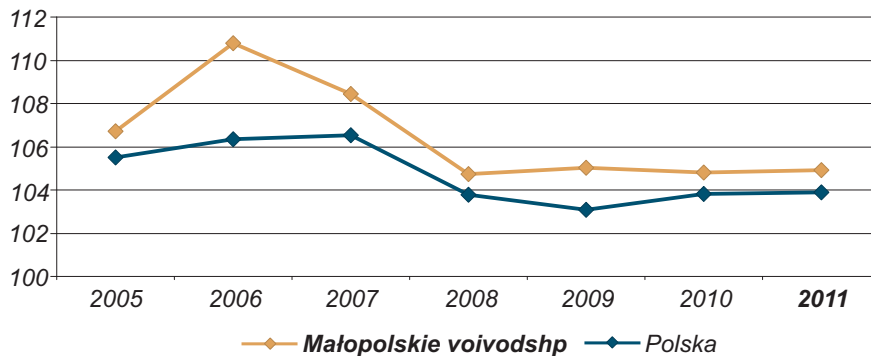
ENTITIES OF THE NATIONAL ECONOMY

As of the end of 31 XII 2011 on the area of the Małopolskie voivodship there were 331.6 thous. entities of the national economy in the REGON register (excluding persons tending private farms), i.e., more by 0.1% than a year before. The increase of private sector (by 259 entities) influenced the increase of total number of entities. However, in public sector the number of entities went down by 17. The number of entities in the Małopolskie voivodship constituted 8.6% of total entities registered in the country.

At the end of December 2011 the REGON register included 80.7 thous. legal persons and organizational entities without legal personality, which number has systematically increased for several years. Among them there were 24.3 thous. commercial companies (their number augmented by 7.8% in relation to 2010), of which 3.9 thous. companies with foreign capital participation (an increase by 4.9%).

The private sector assembled 97.6% of total entities. Units conducted by natural persons (250.9 thous.) predominated and constituted 75.7% of total entities.

Graph 15. Dynamics of commercial companies with foreign capital participation
As of 31 XII; previous year=100



Considering the kind of activity, the most economic entities were registered in following NACE sections: trade; repair of motor vehicles (26.5%), construction (13.4%) and manufacturing (9.9%). In total, almost a half of firms conducted activity in above mentioned sections.

INDUSTRY AND CONSTRUCTION⁴

In 2011 sold production of industry in the voivodship amounted to 69.4 billion zł, i.e., more by 14.4% (in constant prices) than a year before. In 2010 growth of sold production was higher and amounted to 19.3% (in constant prices).

The current level of revenue from the sale of goods and services was influenced by the increase of sold production in all NACE sections included in industry. In mining and quarrying an increase by 17.1% was recorded, in manufacturing - by 12.9%, in electricity, gas, steam and air conditioning supply - by 41.8%, in water supply; sewerage, waste management and remediation activities - by 2.4%.

In comparison with 2005 in the structure of sold production of industry the share of manufacturing decreased from 85.8% to 84.1%, whereas the share of water supply; sewerage, waste management and remediation activities decreased from 3.2% to 3.0%; the share of mining

⁴ It concerns economic entities employing more than 9 persons.

and quarrying increased from 2.2% to 2.3%, and of electricity, gas and water supply increased from 8.8% to 10.4%.

In relation to 2010 the average paid employment in industry augmented by 3.5% amounting to 182.4 thous. persons in 2011, similarly the average monthly gross wages and salaries of paid employees in industry increased by 8.0% to the level of 3417.85 zł.

The value of construction and assembly production realized on the basis of the contract system in 2011 domestically by construction firms from the Małopolskie voivodship amounted to 9554 mln zł. Sales of construction and assembly production went up in relation to the previous year by 22.7%, as a result of the increase in value of investment works (by 23.5%) and value of wartości repair and other (by 21.1%). In structure of sales the share of investments increased (by 0.4 percentage points to 66.0%) at the cost of renovations (restorations) and other works.

The average paid employment in construction in 2011 amounted to 50.1 thous. persons (by 8.2% more than a year before), and the average monthly gross wages and salaries - 2876.15 zł (i.e., by 5.9% more than in 2010).

The share of construction and assembly production realized by construction firms of the Małopolskie voivodship amounted to 9.3% of the value of production obtained by such entities in Poland.

TRANSPORT

Year in, year out, the number of registered road vehicles and tractors has augmented. At the end of 2011 it amounted to 2.0 mln, i.e., more by 4.9% than the year before. The majority of them were passenger cars (75.7%), the number of which calculated per 1000 population increased from 431 in 2010 to 450 in 2011.

Within the year 7.9 mln t of goods were transported by hire or reward road domestic transport (in enterprises employing more than 9 persons), i.e., more in comparison with 2010 by 131.5%, and 5.0 mln t of goods in international transport, what means a increase by 41.2% in comparison with the previous year.

In 2011 the John Paul II International Airport Kraków-Balice served about 3.0 mln passengers annually of which 90.8% were passengers served in the foreign traffic. In the discussed year the number of passengers served by Airport increased by 5.7% in relation to previous year.

TRADE

In 2010 retail sales realized by trade enterprises employing more than 9 persons was higher than year before. The value of the wholesale amounted to 80.2 billion zł, and of retail sales 40.7 billion zł, i.e., more by respectively: 22.7% and 9.2% than in 2010.

At the end of 2011 30.8 thous. shops operated (towards 30.4 thous. the year before) of which 37 hypermarkets (36 in 2010), 345 supermarkets (294) as well as 2.7 thous. specialized

shops (relatively 2.4 thous.). A increase was recorded of the number of so-called other shops, which constituted 87.8% of total (i.e., shops of economic entities employing up to 9 persons as well as pharmacies regardless of the number of employed persons).

The number of catering establishments⁵ reduced in relation to the previous year and amounted to 1.4 thous. whereas the sale from the catering activity augmented - by 3.7%, reaching the value of 1.2 billion zł.

FINANCES OF ENTERPRISES

In 2011 the financial results of surveyed enterprises (employing more than 9 persons) were worse than the results obtained in the previous year. Deteriorated fundamental financial and economic indicators. Gross turnover profitability amounted to 4.4% (towards 4.9% year before), whereas net profit margin amounted to 3.6% (4.1%).

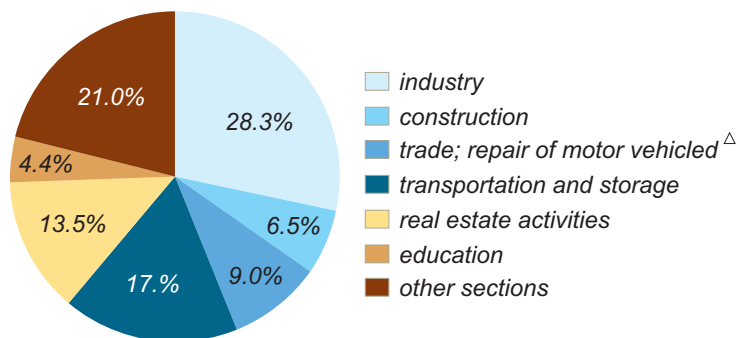
Revenues from total activity increased by 13.8%, and costs of obtaining them by 14.4%, what reflected, i.a. in deterioration of the cost level indicator from 95.1% in 2010 to 95.6%. The net financial result (with increase of net profit and increase of net loss) shaped at the level of 7500,2 mln zł, that is higher by 1.1% than in 2010. Positive net financial result was shown by 80.0% of surveyed enterprises (in 2010 - 81.3%).

At the end of December 2011 the value of current assets amounted to 61.1 billion zł, i.e., more by 11.4% than in 2010.

INVESTMENTS AND FIXED ASSETS

In 2011 investment outlays (according to investment location) reached 18.1 billion zł, of which almost 10.7 billion zł in private sector. Investment outlays in Małopolska increased in relation to 2010 by 13.2%. According to NACE, investment outlays were the highest in industry and accounted for 28.3% of total outlays, in transportation and storage - 17.3% of total and in real estate activities - 13.5%.

Graph 16. Investment outlays per capita structure by NACE in 2011



⁵ It concerns economic entities employing more than 9 persons.

In 2011 investment outlays per capita amounted to 5431 zł. and were higher than year before by 620 zł. (in current prices).

Gross value of fixed assets⁶ (in current book-keeping prices) in relation to 2010 increased by 6.7% and as the end of 2011 amounted to 196.6 mld zł.

Relatively the biggest value of fixed assets was recorded in industry - 28.3% and in real estate activities - 21.4% of total. At the end of 2011 gross value of fixed assets per capita in the Małopolskie voivodship amounted to 58.8 thous. zł towards 55.3 thous. zł the year before.

PUBLIC FINANCE

Revenue

In 2011 local self-government entities of the Małopolskie voivodship worked out total revenue of 14455.5 million zł, that is more (by 4.5%) than in the previous year.

Revenue of gminas budgets constituted 47.7% of total revenue (increased by 0.6 percentage points than year before), and revenue of cities with powiat status budgets - 29.2% (in 2011 – 30.6%). Revenue of powiats budgets constituted 13.4% of total revenue (year before – 13.9%). Self-government voivodship's budget had the lowest share in total revenues – 9.1% towards 7.8% in 2010.

In 2011 (in relation to previous year) structure of revenue by kind changed; share of own revenue increased but share of allocations and general subsidy decreased. In 2011 own revenue constituted 45.1% of total revenue (42.3% a year ago), allocations 23.9% (less by 2.0 percentage points than in 2010), and general subsidy 31.0% towards 31.8% the year before.

Graph 17. Structure of revenue and expenditure of local self-government entities budgets in 2011



^a Excluding revenue and expenditure of gminas which are also cities with powiat status.

In 2011 total revenue of local self-government entities per capita in the Małopolskie voivodship amounted to 4327 zł (by 174 zł more than in 2010), while in gminas - 2930 zł (more

⁶ The division of fixed assets by NACE sections was made according to the abode of local kind-of-activity unit.

by 151 zł), in cities with powiat status budgets - 4412 zł (less by 18 zł), in powiats - 811 zł (more by 3 zł) and from self-government voivodship budget - 394 zł (more by 70 zł).

Expenditure

Total expenditure of local self-government entities in 2011 amounted to 15073,4 mln zł and increased by 2.7% in comparison with the previous year. Dynamics of expenditure was clearly lower than dynamics of revenue. 49.5% of total expenditure accounted for gminas budgets, 28.0% for cities with powiat status budgets, 13.2% for powiats budgets, and 9.3% for voivodship's budget.

In 2011 the structure of current expenditure and property expenditure was almost the same as year before. Current expenditure (11363 mln zł) constituted 75.4% of total expenditure. Share of wages and salaries increased from 44.2% in 2010 to 47.4% in 2011. Share of current expenditure disposed on purchase of materials and services amounted to 11.6% (towards 12.4% in 2010). Property expenditure in the amount of 3711 mln zł constituted 24.6% of total expenditure (24.3% in 2010) and almost in total were destined for financing investments.

. Expenditure on education (31.7% of total expenditure), on transport and communication (17.5%) as well as on social assistance (11.8%) prevailed.

Calculating per capita in the Małopolskie voivodship total expenditure of self-government entities amounted to 4512 zł (by 105 zł more than in the previous year), whereas from gminas budgets - 3130 zł (more by 120 zł), from cities with powiat status budgets - 4404 zł (less by 89 zł), from powiats budgets - 836 zł (less by 21 zł) and from self-government voivodship budget - 420 zł (more by 60 zł).

Local self-government of Małopolska closed the year 2010 with a deficit in the amount of 846 mln zł, what in relation to the previous year means a improvement (for 2010 - minus 846 mln zł). In all kind of local self-government entities took place a reduction of budget deficit. Whereas only in cities with powiat status closed the year 2011 with a surplus.

GROSS DOMESTIC PRODUCT

In 2010 Małopolska generated 7.3% of GDP, what gave it the fifth position in Poland, after voivodships: Mazowieckie, Śląskie, Wielkopolskie and Dolnośląskie. Calculating per capita GDP amounted to 31.5 thous. zł and it was lower by 15.1% than the average level in Poland. This result placed Małopolska on eighth position in the country. In relation to 2009 GDP in Małopolskie voivodship increased by 3.9%.

In 2010 gross value added was elaborated mainly by non-financial corporations sector (48.9%), then households sector (31.0%) and general government sector (16.4%). As regards the kind of conducted activity, the most of gross value added was elaborated by entities conducting activity in services including: trade; repair of motor vehicles; transportation and storage; accommodation and catering; information and communication - 30,5%.

Małopolska at the background of other voivodships⁷

The following subsection is the continuation of the analytic part included in the Statistical Yearbook of the Małopolskie voivodship⁸.

In order to present the socio-economic situation of the Małopolskie voivodship against a background of other voivodships there have been distinguished five fields: demography, labour market, economic living conditions, social living conditions, economy. In further calculations in particular fields the following rates have been considered:

Demography

- *Population per 1 km² of total area (as of 31 XII)*
- *Natural increase per 1000 population*
- *Post-working population per 100 persons of working age (as of 31 XII)*
- *Internal and international net migration for permanent residence per 1000 population*

Labour market

- *Activity rate by working age and sex*
- *Average monthly gross wages and salaries in zł*
- *Persons working in hazardous conditions per 1000 paid employees of total surveyed (as of 31 XII)*

Social living conditions

- *Average usable floor space per dwelling in m²*
- *Students of higher education institutions per 10 thous. population*
- *Museums visitors per 1000 population*
- *Consultations provided in out-patient health care per capita*
- *Ascertained crimes in completed preparatory proceedings per 10 thous. population*

⁷ *Elaborated by Monika Wałaszek, the Małopolski Centre of Regional Surveys.*

⁸ *Considered rates have been slightly modified, methodology of calculations remain unchanged, so their description has been omitted, detailed information available in Statistical Yearbook of the Małopolskie Voivodship 2010, Kraków 2010, page 395.*

Economic living conditions

- *Average monthly expenditures of households per capita (in zł)*
- *Own revenue of local self-government entities per capita (in zł)*
- *Beneficiaries of social assistance benefits per 10 thous. population*

Level of economy

- *Natural persons conducting economic activity recorded in the REGON register per 10 thous. population (as of 31 XII)*
- *General domestic product per capita in 2010 in zł*
- *Expenditures on research and development (R&D) per capita (current prices, excluding depreciation of fixed assets) in 2010*
- *Total value of projects financed by EU for 2007-2013 per capita in zł - (as of 30 XII 2011)*
- *Share of big economic entities⁹ in the country scale*

Results of grouping

As in the previous year, on the basis of obtained results, one can say that the Małopolskie voivodship has got very favourable social living conditions. Two fractional rates: students of higher education institutions per 10 thous. population and Museums visitors per 1000 population reached the highest value. Four of the five fractional rates had values above the average. Moreover, the rate for the Małopolskie voivodship reached the highest value in the country scale, what would prove the significance of the voivodship as an important centre of cultural life.

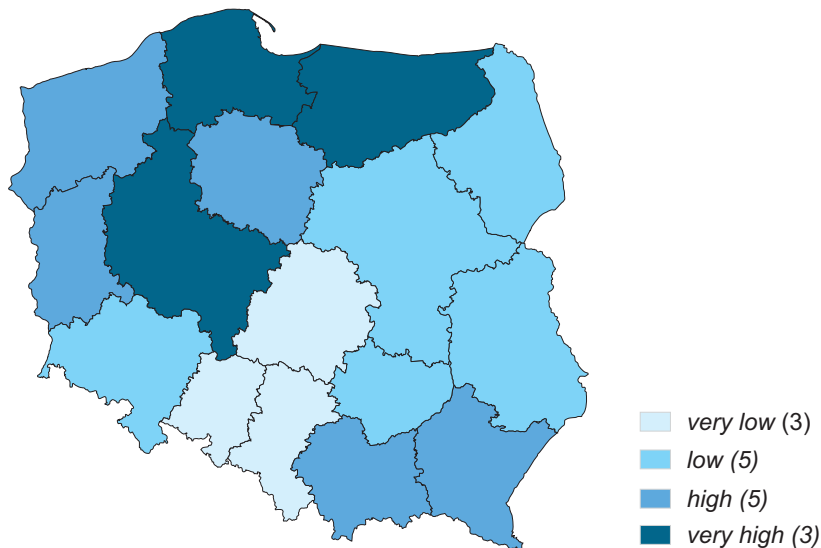
Unlike in the previous year indicators, Małopolskie voivodship, in all five areas, ensured a place in the group of regions with high or very high level of development. Moreover, Małopolska has got favourable conditions to the development of economy and labour market, occupying the fourth and third place in the ranking (improving its position in the previous year). At the same time, the labor market in the area of three voivodships worsened their situation in the ranking, four improved and eight remained at the same level. Again, the economic level of the Małopolskie voivodship improved its position, while at the same time, five voivodshps dropped in the ranking, five improved its position and six remained at the same level.

⁹ *Big entities are assumed as those employing more than 250 persons.*

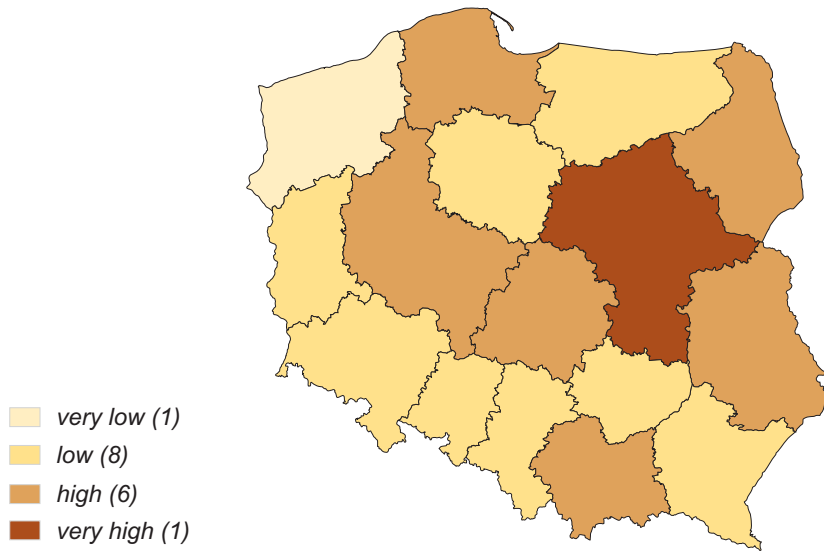
It should be noted that in the area of economic level, only one voivodship was in a group with a very high level of development. The city of Warsaw greatly influenced the value of economic development rate for the Mazowieckie voivodship, overstating its value, and what follows, artificially extending a given rate range. Moreover, one of the fractional rates used while constructing the synthetic rate for this area was the share of big enterprises on the voivodship's area in the country scale. Here it is worth to mention that the Małopolskie voivodship is characterised by a big share of mountainous sites as well as legally protected areas, which constrain the possibility of development of big enterprises, what influences the value of the above mentioned fractional rate. Summarizing, the rate which could revise previously mentioned stipulations would probably place Małopolskie voivodship in the group of voivodships with very high level of the economic development. The only area putting the Małopolskie voivodship in the lowest, eighth position in ranking in comparison to other areas was demography.

The taken place was a results of two fractional rates value: population per 1 km² of total area (the second largest value) and Post-working population per 100 persons of working age. Better, but not yet satisfying position Małopolskie voivodship gain in the area of economic living conditions. In relation to the results obtained in the previous year improved its ranking by five places: what was the result of growth (above average) the average monthly expenditures of households per capita and the decrease (below average) number of beneficiaries of social assistance benefits per 10 thous. population.

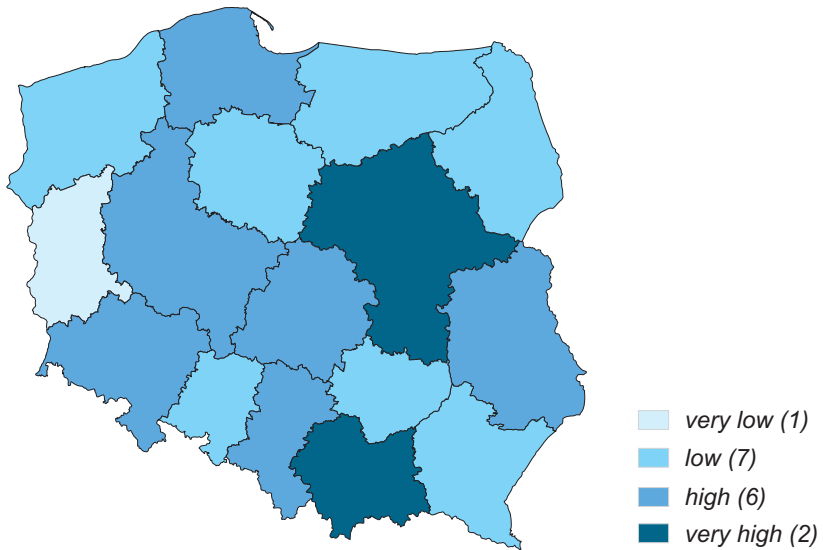
Map 1. Results of grouping on the basis of synthetic rate of demographic development level



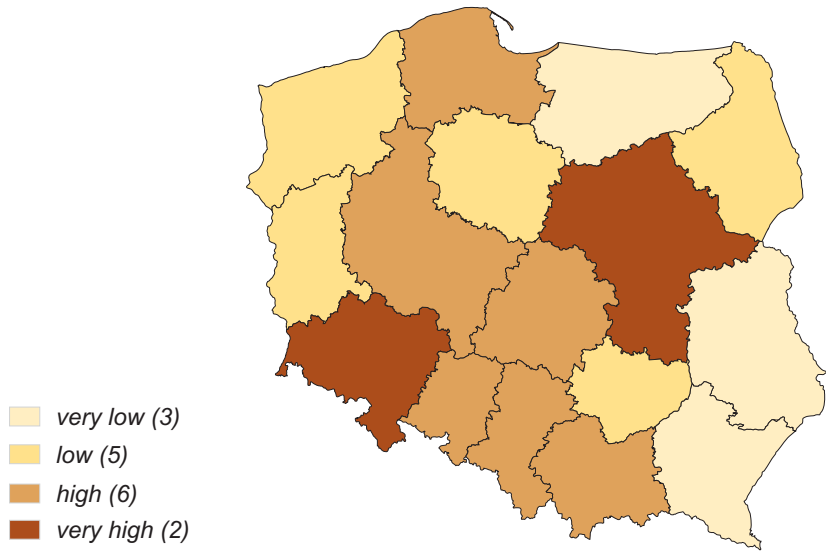
Map 2. Results of grouping on the basis of synthetic rate of labour market development level



Map 3. Results of grouping on the basis of synthetic rate of social living conditions development level



Map 4. Results of grouping on the basis of synthetic rate of economic living conditions development level



Map 5. Results of grouping on the basis of synthetic rate of economic development level

