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Janusz SŁODCZYK
Opole University

# THE ECONOMY OF OPOLE PROVINCE

The tradition of industrial production in Opole Region dates back to the ancient times, and the preserved craftsmen's artefacts and objects found in numerous excavations can only too well testify to the truth of the statement. The oldest branches of production, which were developing in Opole Silesia in the remote past, included various crafts, extraction of ores and metallurgy. In the 18th century the economic activity outside agriculture, which was carried out by the local people, played a vitally significant role in the economy of the region [Straszewicz, 1970]. The most important branches of production included textile industry, which was based on flax plantations, and sheep breeding, which developed mainly in the southern part of the region, in the foreland of the Sudetes.

As well as exploration of sod ores, the possibility of making use of timber from the forests covering the northern part of the region for burning purposes, provided the basis of development of iron metallurgy, most of all, in the Mała Panew River Valley. The water resources in the rivers and their availability for energy producing purposes again proved vital while founding metallurgy centres in this area. Later, it was coal brought here from the mines of Upper Silesia that became the chief source of energy for the local metallurgy industry. Another traditional branch, which developed successfully in Opole Silesia, was production of lime, based on the local natural sources that are especially rich in the area of Strzelce Opolskie.

At the end of the 19th and the beginning of the 20th century, in the time of the industrial revolution and early capitalism, Opole Region witnessed a fast development of the existing branches of production and appearance of new types of industry. Apart from the above-mentioned metallurgy, lime production and textile industry, the following branches developed rapidly: food industry, cement production, iron-based industry and some other minor ones. The most important industrial centres included: Opole, the Mała Panew Valley, and later – Koźle and Kędzierzyn. Gradually, in comparison with the other branches, the significance of the lime and cement industries grew to the extent that they became the leading branches in Opole Silesia.

In the time before World War 2, Opole Region had an industrial sector of differentiated production lines, considerable potential and fairly even distribution. In consequence of the Second World War, Opole Silesia became part of the Polish State. However, the military activity during the war brought about destruction of considerable industrial potential of the Region. Accordingly, in the first period after the war, the Polish authorities concentrated on rebuilding and re-starting the ruined businesses which had been in operation before the Second World War. In the subsequent years, though, within the so-called period of socialist industrialisation, an attempt was made at modernising the existing and creating new elements of the economic structure of the Region. Opole Region became then a strong industrial centre, specialising in manufacture of electric and engineering commodities such as: vans (Nysa), agricultural machines (Brzeg, Strzelce Opolskie), installations for chemical industry (Nysa, Opole), electric engines (Brzeg), machines and tools (Kluczbork). Chemical industry (nitrogenous fertilizers – Kędzierzyn-Koźle, coking plant – Zdzieszowice, carbo-chemistry and petrochemistry – Blachownia Śląska) developed to a great extent, too. The traditional specialisation in cement production was further developed (the construction of new cement plants in Strzelce Opolskie and Górażdże), as well as the important place in the economy of the region was retained by metal industry establishments (Ozimek, Zawadzkie). Centres of glaziery (Jedlicze), paper production (Krapkowice, Głuchołazy), a number of furniture manufacturing plants, textile manufacturing factories (among others: Prudnik, Kietrz, Głubczyce, Opole, Dobrzeń Wielki), and also leather processing plants (Krapkowice, Prudnik, Głuchołazy) were in operation. Apart from that, the branch of agricultural and food industry became an integral part of the economic structure of the Region, with such plants as: sugar-factories (Otmuchów, Baborów, Polska Cerekiew), confectionery manufacturers (Nysa, Brzeg), large edible fat manufacturing plants (Brzeg), breweries (Głubczyce, Namysłów) and a number of other companies. In the last forty years of the centrally planned economy, the largest investment carried out in the area of the Region was Opole Power Plant.

Despite the relatively high level of industrialisation of Opole Region there did not appear in its area any great concentration of industry like those in the neighbouring regions. The industry developed rather evenly in the individual areas and city centres of Opole Silesia.

Although Opole Region is characterised by good conditions for development of agriculture and comparatively high agricultural culture, it was industry which – in the forty-year period after the War – became the engine of its economy. This fact manifested itself in the percentage of the inhabitants employed in the industry, which – in comparison with the other provinces – belonged to the highest in the country. It must be underlined here that in the conditions of centrally controlled economy, the rise in the employment figures in industry was to a large extent an expression of its extensive development. This means that the rise in production was obtained through an increase in the employment and not by a rise in productivity.

The change in the political system and economic model, which occurred in Poland, gave rise to a series of processes that, to a great extent, influenced the situation and economic structure of Opole Region. There followed far-reaching transformations in the ownership structure and the process of privatising has not yet been finished. Unfortunately, there also occurred a drop in the demand for a number of commodities produced in the Region, as well as a new challenge for companies based in Opole Region to compete with manufacturers from other regions of Poland and – what turned out even more challenging – with large multinational corporations. Not all of the enterprises could meet the demands of the new conditionings. Some lines of production had to be closed and even whole companies became liquidated as a result. At the same time there appeared new enterprises and new directions of production, connected with external, mostly foreign-based, capital.

It should be stressed that from the point of view of demands of the Region's economy, the inflow of the capital from outside the Region so far has not been adequate to counterbalance the loss of workplaces in the production sphere or in other branches. In consequence, unemployment, whose spatial structure is greatly differentiated (Fig. 1), has become a lasting element of the labour market in the Region. For example, in the eastern part (inhabited mainly by the population of the Silesian origin) the unemployment rate is clearly lower (in some communes it does not exceed 5%). One of the reasons for this state of things in this area is mass, seasonal or permanent leaving for Germany or other EU countries in search of jobs. A far more difficult situation is noticed in the labour market in the south-western and western parts of Opole Region (in certain communes the unemployment rate exceeds 20%). Again the factors influencing the rate in this area include limitation of employment and

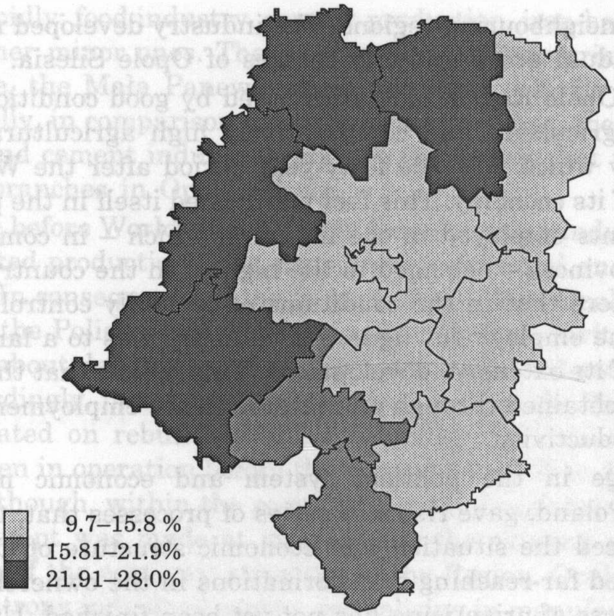


**Fig. 1.** The unenployment rate in Opole Province according to counties in 2001

liquidation of large enterprises based in Nysa, Głuchołazy or Paczków, and also the speedy dissolution of state-run farms.

After a few years of transforming the economy, industry is still the dominating sector of economy of Opole Region. This manifests itself in the share of this sector in creating the gross added value (GAV), which amounts to 30.6%, that is more than the average for the whole country (27.9%). As regards market-related services it is 38% of GAV, non-market services – 15%, construction industry – 9% and in agriculture – 7% (compared to the national 5%). Generally, the presented region is distinguished by a higher share of the first and second sectors in the economy than the average value for Poland, and a lower share of services.

An indicator of the role of industry in Opole Region is also the share of this sector in the structure of the employed. It must be underlined that the role of the industry as the employer is becoming restricted, which manifests itself in the decrease in the share of the employed in the industry from 27.5% in 1990 to 22.2% in 2000. In comparison with the other regions in the country this percentage is high (a higher percentage of the share of the employed in the industry is recorded only in the Province of Silesia).

The role of industry in the structure of the employed is spatially differentiated. The counties in which the percentage of the employed in the industry sector exceeds 45% form a large area that encompasses the central and eastern part of the Region (Fig. 2). This group includes the following counties: Kędzierzyn-Koźle, Krapkowice, Opole (except the city of Opole) and Olesno.

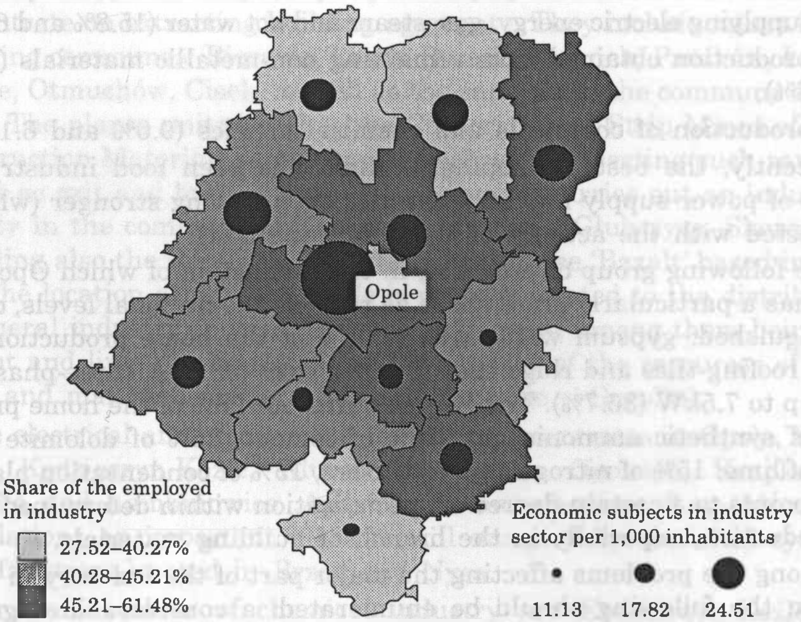


**Fig. 2.** Share of the employed in industry and the number of economic subjects registered in the REGON system in industry sector in Opole Province in 2001

The structure of industry according to the branches is characterised by a considerable degree of differentiation, which is considered to be a strong point in the economy of the Region. This feature proved most advantageous in the first period of the economy transformation, when the areas in which one branch was absolutely dominant suffered the most. The industry in the Region is not dominated by one particular type of business activity; instead, a group of industries which play a decisive part, can be distinguished.

On the basis of such criteria as production, employment and fixed assets, the basic industries of Opole Region include traditionally the following ones: electrical and engineering industry, chemical industry, fuel-power providing, mineral materials, light and food industry [Mikołajewicz, 1997].

Taking into account the information concerning the percent share in the production sold and employment in the industry of the Region, the basic group consists of seven branches which yield about 78% of the production sold and which concentrate about 68% of all the employed in the industry.[1] The branches include the following:[2]

– manufacture of food articles and beverages (share in production sold – 19.3%, share in employment in industry – 13.3%);

– supplying electric energy, gas, steam and hot water (15.8% and 6.7%);

– production obtained from remaining non-metallic materials (12.2% and 8%);

– production of chemicals and chemical articles (9.0% and 6.1%).

Recently, the best developing of them has been food industry; the share of power supply industry has also been getting stronger (which is connected with the activity of Opole Power Plant).

The following group of products, in the production of which Opole Region has a particularly great share as regards the national levels, can be distinguished: gypsum wallboards (71.2% of the home production), cement roofing-tiles and ridge tiles (56.9%), coke (38.8%), three-phase motors up to 7.5kW (36.7%). The Region turns out 28% of the home production of synthetic ammonia gas, 25% of cement, 26% of dolomite flour, 23% of lime, 15% of nitrogenous fertilizers, 15% of condensation plastics. This points to a certain degree of specialisation within determined types of production, especially in the branch of building materials.

Among the problems affecting the major part of the industry in Opole Region the following should be enumerated: a considerable degree of decapitalisation of property assets and a high level of material-consumption. The basic direction for restructuring of the industry must be a rise in the effectiveness of making use of elementary production factors and also rational energy-saving and material-saving economy [Mikołajewicz, 1997]. According to analysts, an improvement in the production quality is in progress, which finds its expression in the fact that a number of enterprises were granted ISO 9000 certificate.

The spatial structure of the industry in Opole Region should be classified as favourable. Generally, a relatively even distribution of industrial production over the area of the Region can be regarded as its great asset.

The main concentration of the industry is Opole Industrial District, which includes the central-eastern part of the Region, bordering on Silesian Province, with such centres as: Kędzierzyn-Koźle, Zdzieszowice, Krapkowice, Strzelce Opolskie, Zawadzkie, Ozimek and Opole. Another area of a higher concentration of industry is the south-western part of

[1] On the basis of data for the first quarter of 1999 [*The Statistical Bulletin*, 1999].

[2] The sectors according to the European Classification of Business Activity.

the Region called Nysa Industrial Unit (with such centres as: Paczków, Otmuchów, Nysa, Głuchołazy, Prudnik, Biała).

The distribution of industrial establishments connected with mining is conditioned by location of raw materials which are extracted [*The Industry of Opole Province...*, 2002]. Opole Mines of Mineral Raw Materials concentrate on extracting building aggregate. They include mines in the following communes: Bierawa, Lewin Brzeski, Ozimek, Paczków, Łambinowice, Otmuchów, Cisek, as well as the sand pit in the commune of Bierawa. The plants united within the Corporation of Strip Mines of Road Construction Materials in Niemodlin deal with extracting such raw materials as grit and broken stone. The company carries out an industrial activity in the communes of Tułowice, Prudnik, Głubczyce, Skoroszyce, including also the Rock Raw Materials Enterprise 'Bazalt' based in Gracze. The location of raw materials is directly related to the distribution of mineral industry centres, the most important among them being the cement and lime processing plants in the area of the resources of limestone and marl (*i.e.* Opole – Strzelce Opolskie – Gogolin).

The electrical and engineering industry concentrates in Opole, Brzeg, Nysa, Kędzierzyn-Koźle, Kluczbork, Strzelce Opolskie, Krapkowice, Praszka and Łambinowice. Apart from manufacture of machines and installations an important place is still occupied by electrical systems manufacturers located in Brzeg and Nysa.

The main centres of chemical industry are Kędzierzyn-Koźle and Zdzieszowice, and the biggest plants in the chemical industry branch are the Nitrogen Processing Plant 'Kędzierzyn', 'Blachownia Holding' and Zdzieszowice Coking Plant. The branch of metallurgy is represented by the Steelworks 'Małapanew' in Ozimek and Steelworks 'Andrzej' in Zawadzkie. There are also a group of establishments manufacturing steel products, functioning in the north-eastern part of the Region (Praszka, Olesno, Gorzów Śląski), in its central part (Opole, Osowiec, Zagwiździe) and in Grodków. The biggest establishments which manufacture goods from non-metallic materials are localised in Głogówek, Kluczbork, Murów and Nysa.

There are a number of plants which are connected with light industry: manufacturers of clothes, cloth and leather goods. More important centres in this branch include Prudnik, Kluczbork, Opole, Brzeg, Nysa and Głuchołazy. Similarly, the most significant companies of wood-processing and paper-making branch are Krapkowice Paper Mill and Głuchołazy Paper Mill. A number of mills dealing with wood-processing industry are located in the neighbourhood of forest complexes in the Province (Stobrawa-Turawa Forests).

The key production branches include also food processing industry, which is closely connected with agriculture. There are about 60 mills in operation in the Region, four large sugar-plants, twenty dairies (including foreign firms *Sholler* in Namysłów, *Zott* in Opole, and *Toska* in Głubczyce), over 170 establishments of various types, which deal with production, processing and conservation of meat. The edible fat processing company based in Brzeg used to cover one third of the Polish market in the beginning of the 90s. Unfortunately, the unsuccessful privatisation of the plant caused the present firm *Kama Foods* to be in a state of deep crisis, which restricts the possibility of purchasing and processing the rape grown in the Region. There are breweries in operation in Głubczyce (with its three plants in Głubczyce, Brzeg and Niemodlin) and *Ryan* Brewery based in Namysłów. Apart from them there are also alcohol distilleries, fodder mills (among others in Grodków) and potato processing plants (in Nysa) as well. Food for infants and children (the Dutch company *Nutricia* based in Opole) and confectionery (Brzeg, Nysa) are also produced in the Region.

Beside industry, the basic branches of Opole Region's economy include agriculture. As far as the productivity in this sector is concerned the Province takes a high position in the country. This is due to both relatively good natural conditions and culture of farming which is on a higher level than in the other regions of Poland. The Province is characterised by differentiated soil conditions (sandy, loamy soils, fragments of fertile and loessial soils), the most fertile areas being located in the south. From the point of view of agriculture, the climatic conditions, configuration of the surface, as well as water resources should be classified as favourable. Opole Province is included into the group of regions of medium-quality conditions for agricultural production; however, it is ranked the highest among Poland's regions as regards making use of the existing production conditions.

Opole Region, which occupies 3% of the territory of Poland, yields over 13% of the home production of rape, over 8% of sugar-beet, and over 6% of grain production.[3] The Region can be regarded as one specialising in the production of rape and oil-yielding rape. The yield per 1 hectare amounts to 40 quintals (in the country depending on the year – 25–29 quintals). Also yields of potatoes and sugar-beets normally exceed average values for Poland. Similarly, the yield of barley and hop is regularly high in Opole Region, the growing of which is the basis for brewing in-

[3] On the basis of data for the year 2000.

dustry. Another proof of high productivity of agriculture is the Province's first place as far as the average yield of milk per a cow is concerned.

The crops structure in Opole Province is dominated by grains, which occupy about 73% of all the crops. In the group of grains, the most important role is played by wheat (*c.* 35% of all the crops), then barley (13%). The share of rye and oats is small (5.5% and 1.6%, respectively); rape and oil-yielding rape make for 9.5% of the crops, while potato – 5.5%, and sugar-beet – 5%. The distribution of the crops is connected mainly with soil quality: fertile soils of the southern part of the Region are sown with wheat, sugar-beet and rape, the northern one is characterised by a higher share of the potato.

The percent share of the employed in agriculture points to the fact that the role of this sector in the economy of individual counties is greatly differentiated.

In the light of the structure of the employed, agriculture holds the strongest position in the counties of Głubczyce (over 17%) and Namysłów (over 13%). Except for the Namysłowski County, situated in the

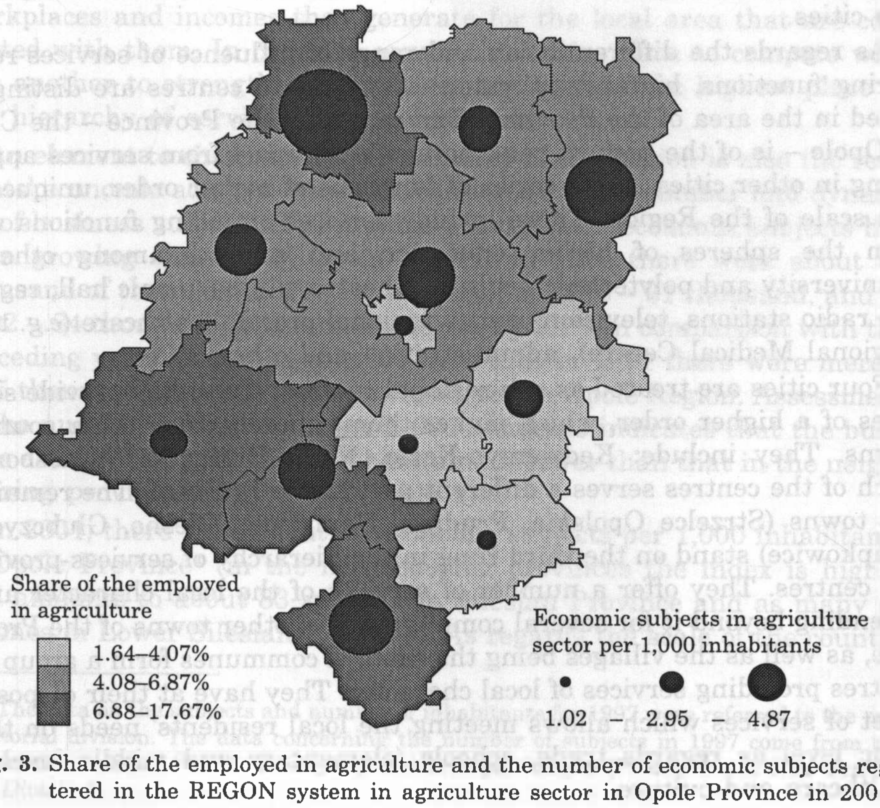


**Fig. 3.** Share of the employed in agriculture and the number of economic subjects registered in the REGON system in agriculture sector in Opole Province in 2001

north-western part, the counties which are characterised by the highest share of the employed in this sector, form a compact area encompassing the southern part of Opole Province (Fig. 3). The lowest percentage of the employed in agriculture, slightly exceeding 2%, is typical of the three counties in the east of the Region, that is Kędzierzyńsko-Kozielski, Strzelecki and Krapkowicki counties.

Individual farms occupy about 70% of the arable area (at the beginning of the transformation process the percentage amounted to about 58%). In the structure of farms according to the size, a gradually progressing process of concentration of the land can be observed (the area occupied by larger farms is growing, while the area occupied by small farmholds is getting smaller).

Since the beginning of the nineties, along with the transformation process, there has been occurring a change in the role of particular sectors of economy. A rise in the importance of the services sector is visible in Opole Region, like in the other ones. Both the growth in the share of the employed and the increasing number of enterprises in this sector testify to this fact. The centres in which services concentrate in the first place are cities.

As regards the differentiation and range of influence of services-rendering functions, hierarchical categories of urban centres are distinguished in the area of the Province. The capital of the Province – the City of Opole – is of the highest rank here, which, apart from services appearing in other cities, has a series of functions of higher order, unique in the scale of the Region. Those include services-providing functions within the spheres of higher education and science (among others: a university and polytechnic), culture (theatre, philharmonic hall, regional radio stations, television centre, regional press), healthcare (*e.g.* the Regional Medical Centre), administration and others.

Four cities are treated as sub-regional centres, since they provide services of a higher order, which makes them different from other county towns. They include: Kędzierzyn-Koźle, Nysa, Brzeg and Kluczbork. Each of the centres serves a different part of the Province. The remaining towns (Strzelce Opolskie, Prudnik, Namysłów, Olesno, Głubczyce, Krapkowice) stand on the third rung in the hierarchy of services-providing centres. They offer a number of services of the local character and extending beyond it for several communes. The other towns of the Province, as well as the villages being the seats of communes form a group of centres providing services of local character. They have at their disposal a set of services which allows meeting the local residents' needs on the basic level as regards trade, schools (elementary and middle levels), healthcare and culture.

The growing role of the services sector in the Region is visible in the direction of changes in the functional structure of the cities of Opole Province. Research into the functional specialisation of the cities in the Region proved that between 1991 and 2001 within the group of cities there followed strengthening of the services function, which concerned even the typical industrial centres [Słodczyk and Rajchel, 2002]. For example, among the three biggest cities in the Region, during the above-mentioned period, Nysa – from a typically services-industrial centre transformed into a services-providing one; similarly, Kędzierzyn-Koźle, which ten years earlier had been a typically industrial centre. Opole, for a long time now, has had a character of a services-providing centre, and Strzelce Opolskie has also changed into one from an industrial-services town at the beginning of the transformation. It must be underlined that together with the decreasing employment and lowering significance of many industrial establishments, functions connected with servicing a given territory have come to play a greater and greater role in the structure of the economic basis of many urban centres. Cities aim at maintaining enterprises which render services, as well as the workplaces and incomes they generate for the local area that are connected with them. In order to secure this, cities have to compete with one another to strengthen their bases and to take the highest place in the hierarchy of services-providing centres.

An element to characterise the economy of the Region is also the residents' economic activity, which is expressed by the number and dynamics of business subjects. The number of registered economic subjects has been growing steadily in Opole Region: in 1996 there were about 48 thousand of them, in 1997 – 54 thousand, in 1998 – 61 thousand, and in 2002 – 84 thousand (which means a rise by 2.1% in comparison with the preceding year). It can be recalled here that in 1991 there were merely 10.5 thousand economic subjects registered in Opole Region. Assessment of the number of businesses per 1,000 residents indicates that the business activity of Opole Silesia inhabitants is lower than that in the neighbouring provinces (Fig. 4 and Table 1).

In 2001, there were about 76 economic subjects per 1,000 inhabitants of Opole Province[4] (in the neighbouring provinces the index is higher and amounts to about 83 subjects in Silesian Province and as many as 95 ones in Lower Silesian Province). As regards the scale of the country

[4] The data on the subjects and number of inhabitants for 1997 were referred to the new territorial division. The data concerning the number of subjects in 1997 come from the publication entitled *Polska w nowym podziale terytorialnym* (*Poland in the New Territorial Division*).

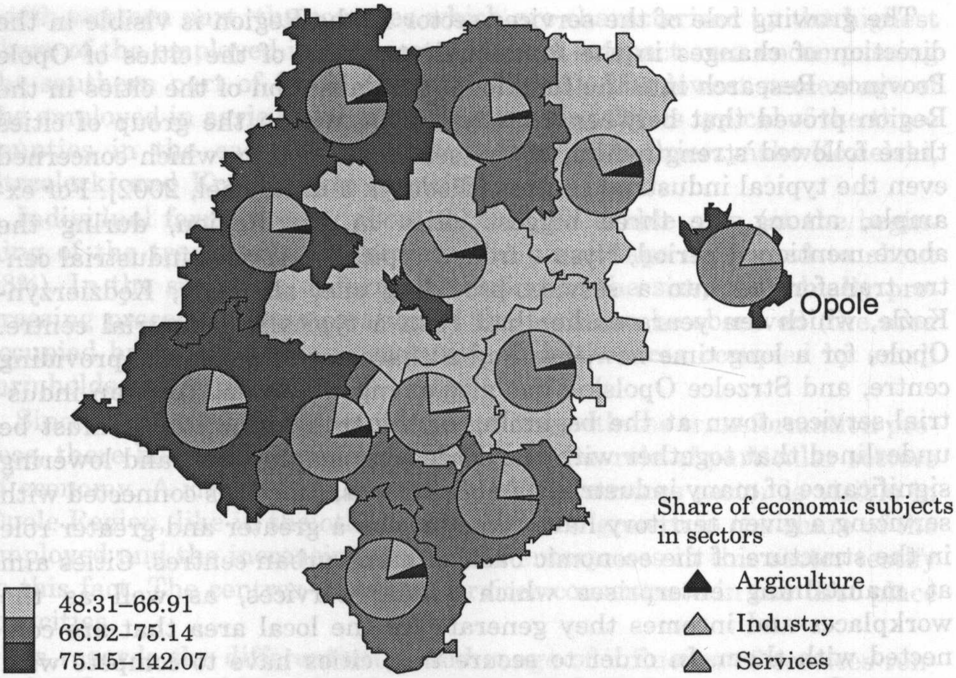


**Fig. 4.** The number of economic subjects registered in REGON system per 1,000 inhabitants and their sector structure in Opole Province in 2001

**Table 1.** The percent share of the employed according to the sectors of national economy in the counties of Opole Province (in 2001)

| County | Agriculture | Industry | Services |
|---|---|---|---|
| Brzeski | 4.8 | 43.6 | 51.6 |
| Głubczycki | 17.7 | 27.5 | 54.8 |
| Kędzierzyńsko-Kozielski | 2.4 | 45.2 | 52.4 |
| Kluczborski | 6.6 | 36.3 | 57.1 |
| Krapkowicki | 2.1 | 61.5 | 36.4 |
| Namysłowski | 13.2 | 32.1 | 54.7 |
| Nyski | 6.9 | 41.5 | 51.7 |
| Oleski | 4.1 | 46.3 | 49.7 |
| Opolski | 5.7 | 51.6 | 42.7 |
| Prudnicki | 8.0 | 40.5 | 41.2 |
| Strzelecki | 2.2 | 40.3 | 47.8 |
| Opole | 1.6 | 29.4 | 69.0 |

Source: own elaboration on the basis of data obtained from the Regional Statistical Bureau in Opole there are 87.8 registered subjects per 1,000 inhabitants, which means that Opole Region is placed below the average. According to analyses carried out in the Region, there exists a certain correlation between the low index of business activity and job-related migrations abroad. A group of communes of a high negative balance of migrations abroad, a low unemployment rate and, simultaneously, a low index of the number of enterprises per 1,000 inhabitants can be distinguished. Migrations lower the unemployment, but – at the same time – restrict the activity related to establishment of businesses. Such relations appear in as many as six counties, the highest indexes of business activity being characteristic of Opole (142 subjects per 1,000 inhabitants) and also of the counties of Brzeg (85), Nysa (78) and Namysłów (75).

There are three zones distinguished within the economic-spatial structure of the Province, which differ as regards the dominant functions, degree of urbanisation, conditionings and possibilities of development (*The Plan of Spatial Management...*, 2002).

**The industrialisation and urbanisation zone**, including the area extending along the Odra River, from Opole in the direction of the border on Silesian Province. In this area, which is characterized by a high level of urbanisation, the following four industrial regions can be distinguished: Opolski, Kędzierzyńsko-Kozielski, Strzelecki-Górażdżański and Ozimsko-Zawadzki. The zone, together with the main centres situated within them: Opole, Kędzierzyn-Koźle, Strzelce Opolskie and Krapkowice, can be treated as the area of Opole agglomeration that is being shaped. As regards the agricultural production in the zone, there dominate wheat, rye and rape, and also maize.

The southern and western areas of the Province form a **zone of special predispositions for development of agriculture, food processing industry, as well as tourism and recreation**. From the point of view of agriculture, the areas are characterised by very good natural and soil conditions, which constitutes the basis of growing wheat, sugar-beet and rape. Beside the agricultural-food industry, being developed on the basis of local resources, it is a tourism-oriented function that is becoming a speciality of this part of the Region. The foundation of its development is the concentration of recreational assets in the south-western part of the Province, that is the area of the Opavskie Mountains (Pokrzywna, Jarnołtówek, Głuchołazy), two large water reservoirs on the Nysa Kłodzka River (Nyskie and Otmuchowskie Lakes), as well as the high class monuments of culture, concentrated in Nysa, Otmuchów and Paczków. The main urban and economic centres of this zone include Nysa, Prudnik and Głubczyce in the south and Brzeg – in the west of the Region.

The northern and north-eastern part of Opole Province is treated as a **zone of considerable potential to develop agriculture, forestry and recreation.** In its southern area forestry is the dominant activity. From the point of view of agricultural needs, the value of this area is classified as of medium quality, the preferred crops in farming being potato, mixed grains, maize and wheat. The basis of development of tourist-related and recreational functions is offered by the Turawa Lakes and the surrounding forests. The major centres of the zone include the county towns of Kluczbork, Namysłów and Olesno.

In conclusion, trying to characterise the economic structure of Opole Region, one must acknowledge the fact that it appears to be a well-developed and versatile area of clearly marked functions as far as the economy of the whole country is concerned. Opole Region possesses conditions to continue the process of restructuring its economy, whose aim is to build competitiveness of the Region in the conditions of European integration.

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