

POLISH INFORMATION AND FOREIGN INVESTMENT AGENCY

Foreign investment climate in Poland

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Key Facts

Official name Republic of Poland

Official language Polish

Capital Warsaw

Area 312 700 sq km (6th in EU)

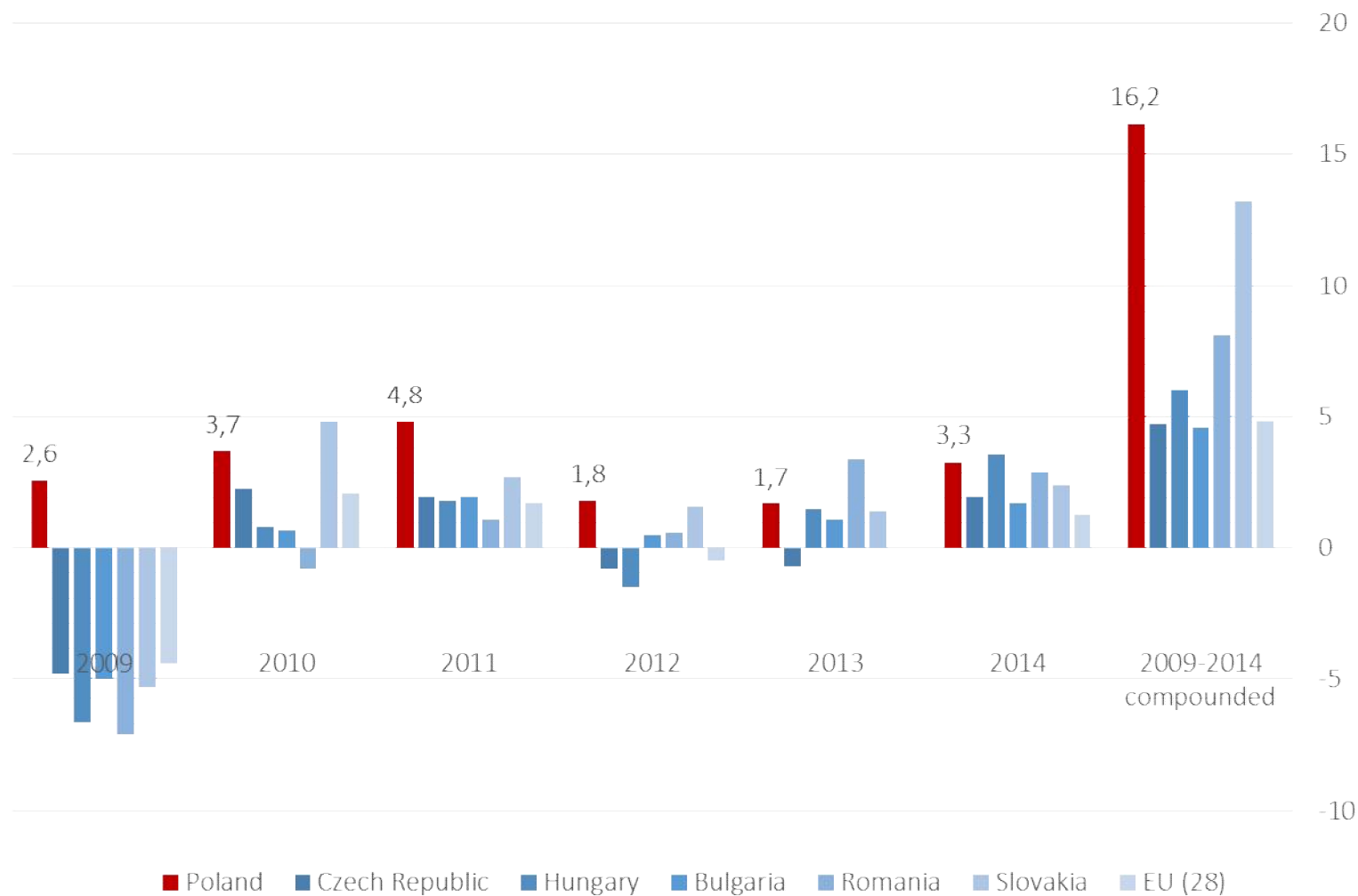
Population 38.5 mn (6th in EU)


Currency Polish Złoty
100 CNY ~62.2 PLN
1 USD ~4.09 PLN
1 EUR ~4.45 PLN

Tax rates CIT 19%
PIT 18%, 32%
VAT 23%

Time zone UTC +1 (Winter)
UTC +2 (Summer)

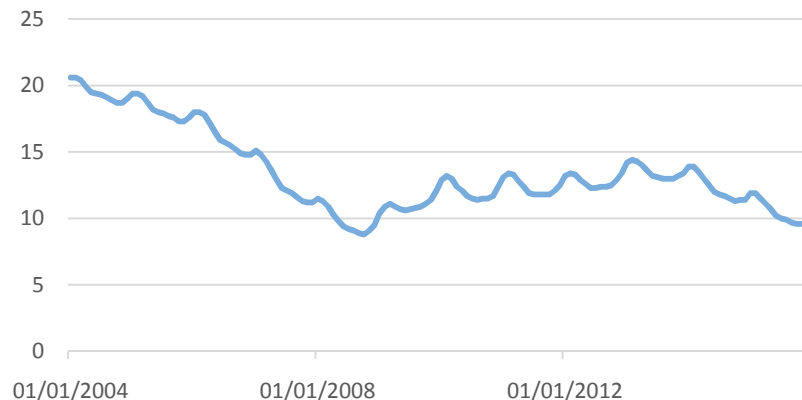






	Real GDP growth forecasts (%)		
	2015 (f)	2016 (f)	2017 (f)
Romania	3.5	4.1	3.6
Poland	3.5	3.5	3.5
Slovakia	3.2	2.9	3.3
Czech Republic	4.3	2.2	2.7
Hungary	2.9	2.2	2.5
Bulgaria	1.7	1.5	2.0
EU28	1.9	2.0	2.1
Eurozone	1.6	1.8.	1.9
Germany	1.7	1.9	1.9

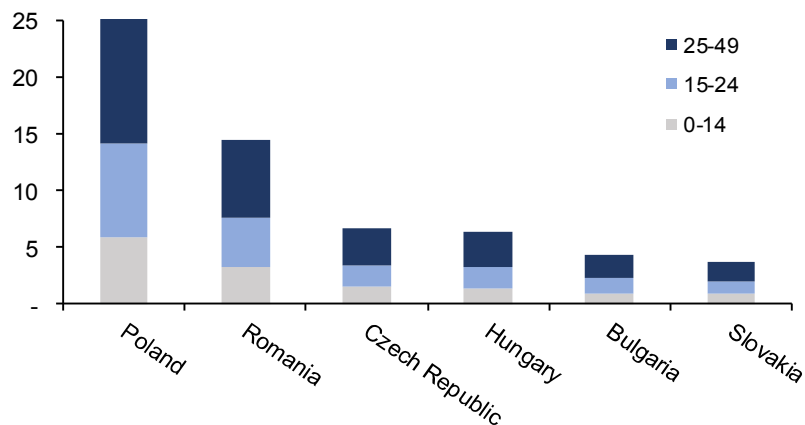
National unemployment rate: 9.6%



Registered unemployed by regions

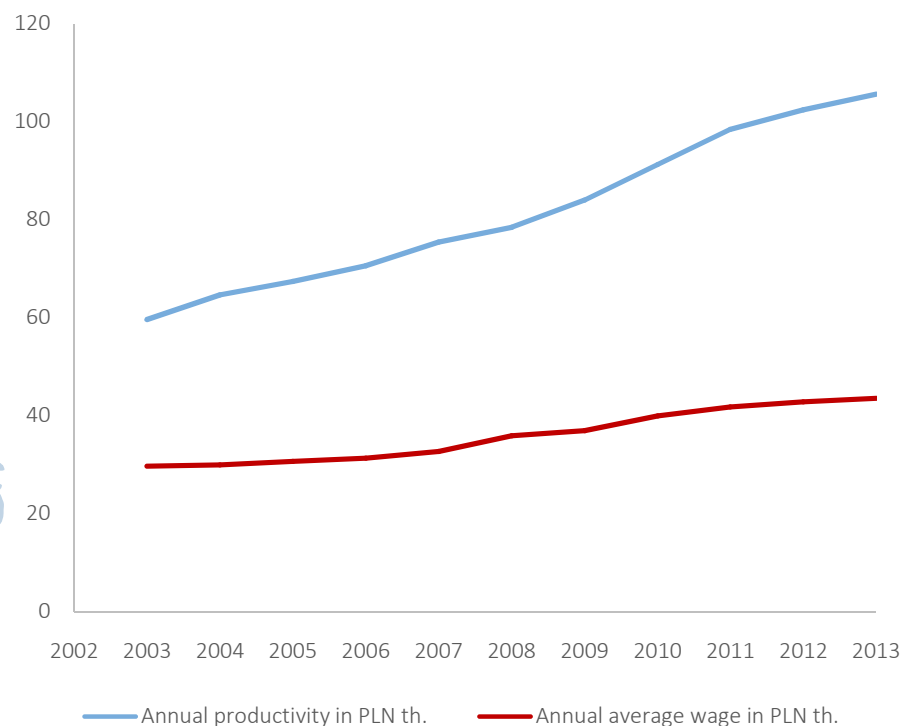
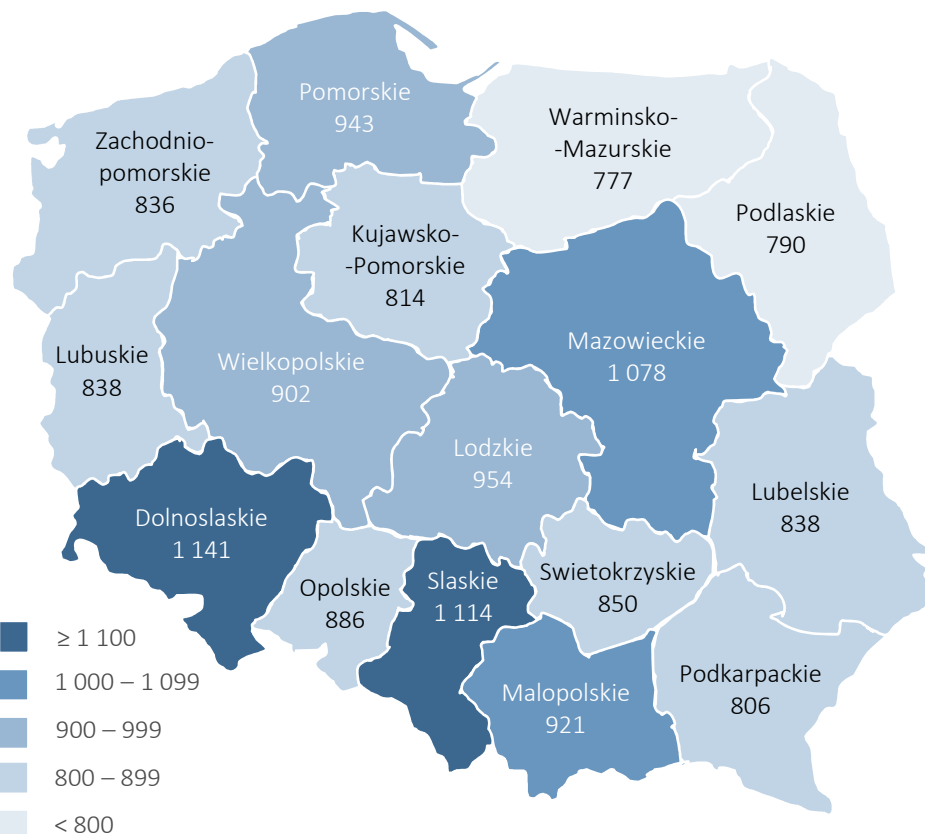


Population by age classes in CEE countries

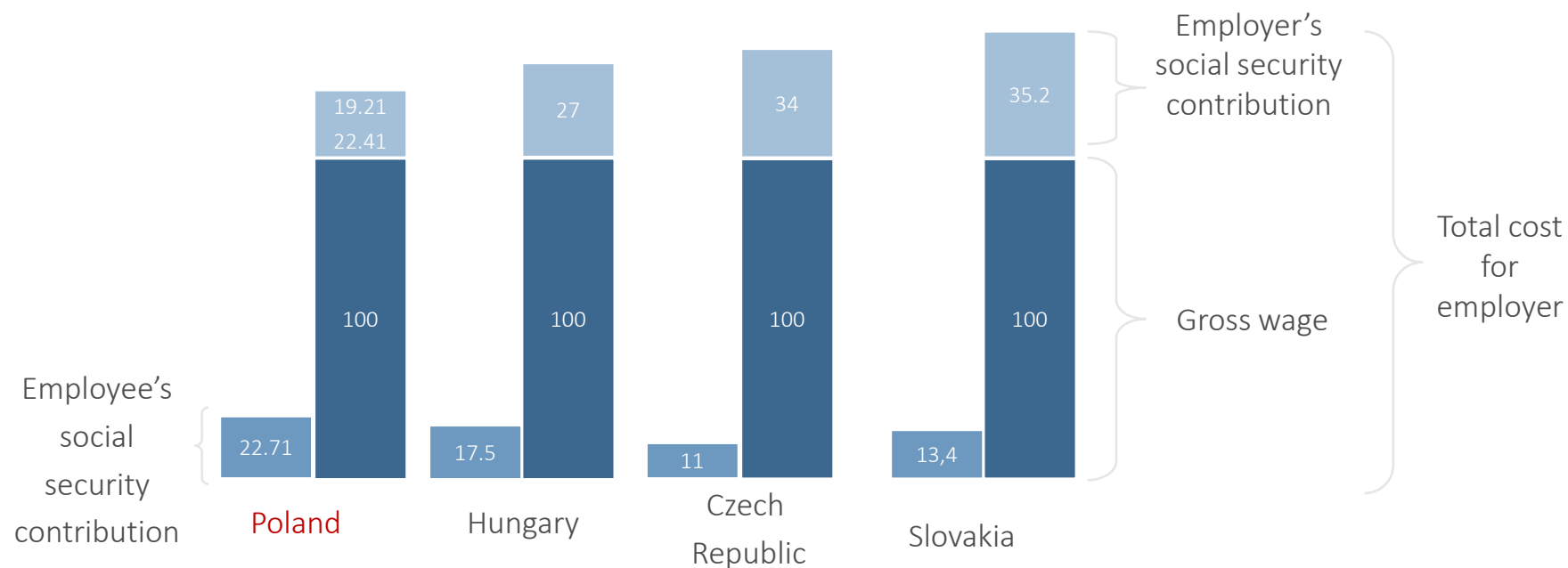


Gross wages (EUR)

Productivity and wages growth



Minimum gross wage: 1 850 PLN (~416 EUR)



Average gross wage comparison does not reflect total labour cost –
social security contributions make a significant difference



24 mn people aged 49 and less (64%)



Almost 1.47 m students (2014/2015)



More than 424 000 graduates (2014)



Over 46 thousand foreign students from 149 countries (3.1% of all students)



More than 90% of students speak foreign languages



Population with higher education: 17%

438 higher education institutions



19 universities



25 technical universities



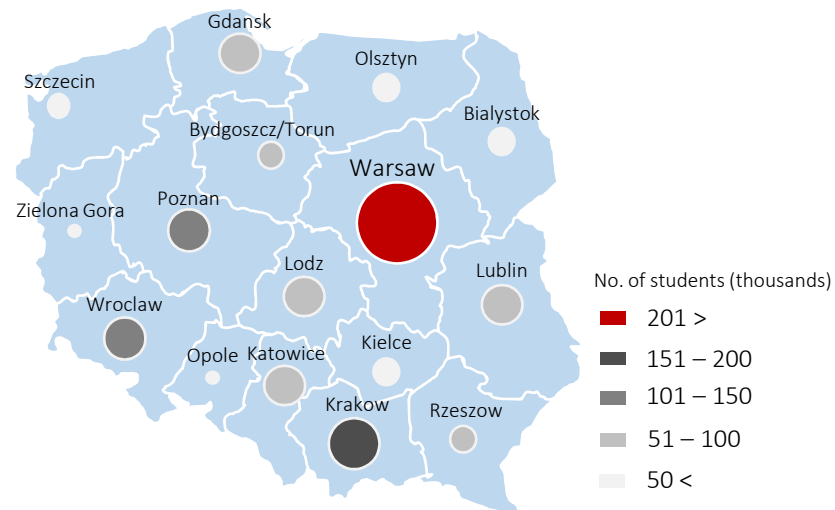
72 academies of economics



200 different majors taught



Growing number of science students



	Students	Graduates
Warszawa	247 515	63 884
Krakow	165 857	46 475
Wroclaw	122 146	31 609
Poznan	116 969	32 505
Katowice aggl.	105 478	31 950
Gdansk aggl.	92 203	23 760
Lodz	80 676	21 343
Lublin	69 658	20 469

	Distance to (km)	
	Hamburg	Rotterdam
Wroclaw	630	1 000
Poznan	550	920
Katowice	800	1 180
Krakow	880	1 250
Lodz	750	1 120
Warsaw	850	1 230
Gdansk	770	1 250

Net cost of a 40' container transport by truck

City	Frankfurt am Main	Amsterdam
Gdansk Warsaw Katowice	2 150 EUR	2 450 EUR

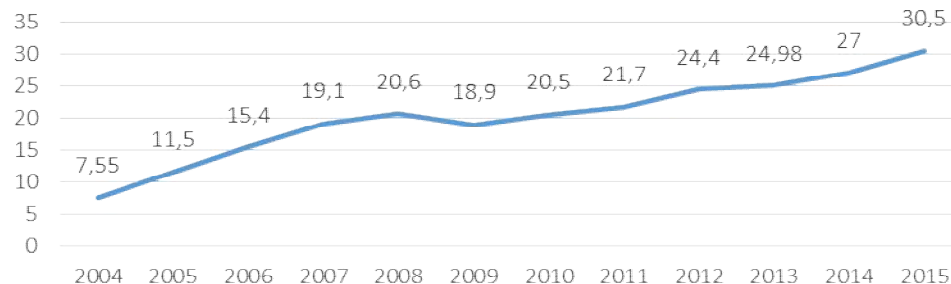


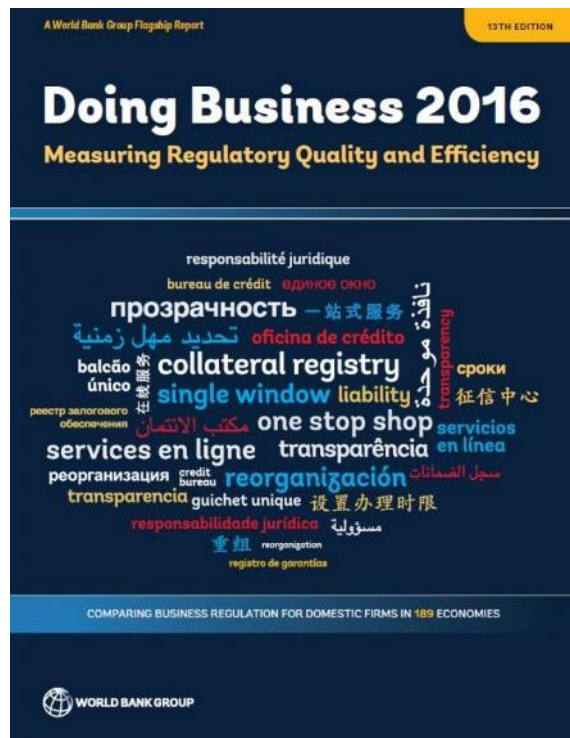
Direct flights to major international destinations

Warsaw	Tokyo, Beijing, Dubai, Toronto, New York, Chicago, London, Berlin, Frankfurt, Munich, Paris, Dublin, Milan, Brussels
Kraków	Berlin, London, Frankfurt, Munich, Paris, Dublin, Milan, Brussels
Gdańsk	Berlin, London, Frankfurt, Munich, Paris, Dublin
Wrocław	London, Frankfurt, Munich, Paris, Dublin, Brussels
Rzeszów	London, Frankfurt, Munich, Dublin
Poznań	London, Frankfurt, Paris, Munich, Dublin
Lublin	London, Frankfurt, Dublin, Brussels
Bydgoszcz	London, Frankfurt, Dublin
Katowice	London, Paris, Milan
Łódź	London, Munich, Dublin
Szczecin	London, Dublin



Passengers served by airports (in mn)





Doing Business 2016

DOING BUSINESS 2016 RANK

25

DOING BUSINESS 2015 RANK

32

DOING BUSINESS 2014 RANK

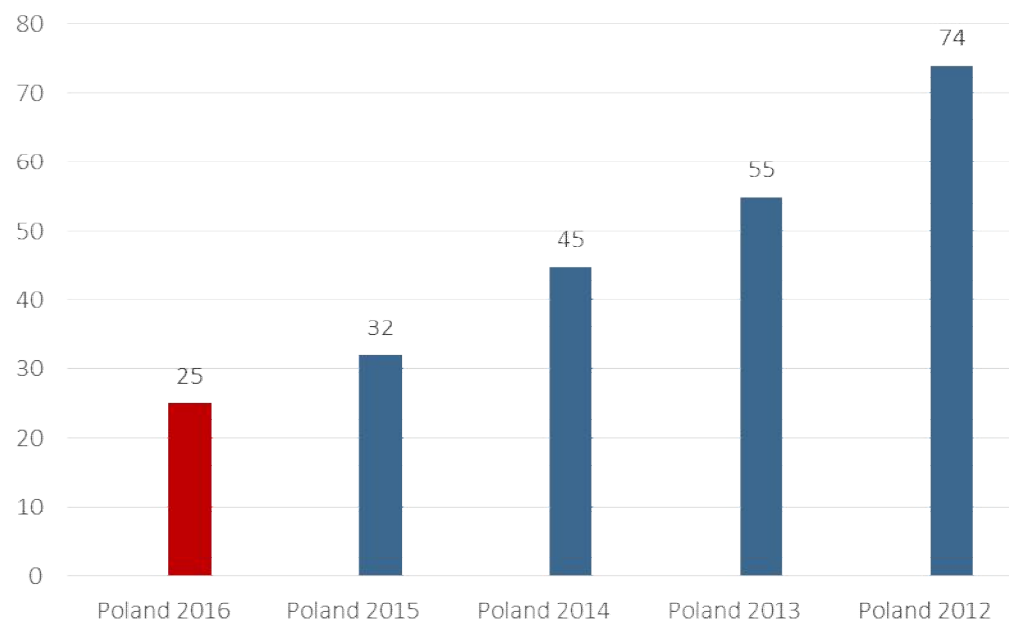
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DOING BUSINESS 2013 RANK

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DOING BUSINESS 2012 RANK

74



„Every region has a leading champion in the scope of improvements made since 2005 — whether Poland for OECD high-income economies, China for East Asia and the Pacific or Colombia for Latin America and the Caribbean.”

- Total of **185** potential FDI projects serviced currently in pipeline
- Total value of investments: **EUR 4.16 bn**
- Total number of new workplaces: **37.8 thous.**

Main sectors:

BSS + ICT (61)
Automotive (38)
R&D (15)
Aviation (13)
Food processing (11)

Major countries – investors:

USA (45)
Germany (26)
Japan, France (13)
UK, Italy, South Korea (11)

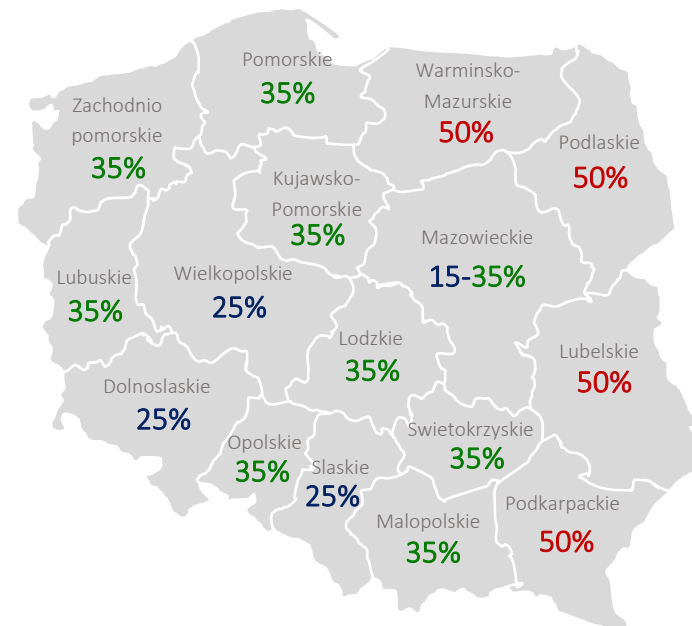


Tax breaks

- CIT exemption in Special Economic Zone
- Real estate tax exemption

Cash support

- Government grants – strategic projects
- EU Funds – grants for R&D



EU Funds in Poland

2007 – 2013

Total: EUR 975 bn
Poland: EUR 69 bn (7%)



2014 – 2020

Total: EUR 960 bn
Poland: EUR 82.5 bn (8%)

Key figures

- Portuguese FDI in Poland totaled **1.9 billion EUR** at the end of 2014
- **146** companies with Portuguese capital registered in Poland
- Portuguese companies are present in the following sectors:
financial, retail, construction, automotive, plastic processing, renewable energies, food & beverage
- Most of Portuguese enterprises are located in Mazowieckie, Wielkopolskie and Łódzkie voivodeships

Major investors



Thank you for your attention

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