

SUCCEED WITH POLAND

THE INFORMATION & COMMUNICATIONS TECHNOLOGY SECTOR

Poland.ICT

Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019

Superb market access

40% of the region's total GDP and a gateway to the wider EU market

Large, high-quality talent pool

300k+ of well-educated graduates annually

Resilient economy

Max score for Macroeconomic Stability in the Global Competitiveness

Almost 30 years of continuous growth

Almost 10 years of stable growth in foreign trade turnover

Transparent

Regional leader in the Transparency International Corruption Index

FDI magnet

3rd in the EU in terms of value of new greenfield projects (2018) One third of all FDI stock in the region

Top-notch infrastructure

1st in CEE in Airport Connectivity & Quality of Road Infrastructure (Global Competitiveness Report)

Largest share of the EU budget

EUR 160bn for Poland in subsidies and loans until 2027

Competitive, well-developed cities

European Cities of the Future (fDi Intelligence)

Warsaw: 7th position (ahead of Berlin and Stockholm)

Kraków: 2nd in EU in Business Friendliness among Large Cities





**WELL-
EDUCATED
SPECIALISTS**



**SOCIETY OF
TECH-SAVVY
EARLY
ADOPTERS**



**EXPERTISE IN
TAILOR-MADE
SOLUTIONS**



**VIBRANT TECH
START-UP
COMMUNITY**

Well-educated specialists Poland's talent pool



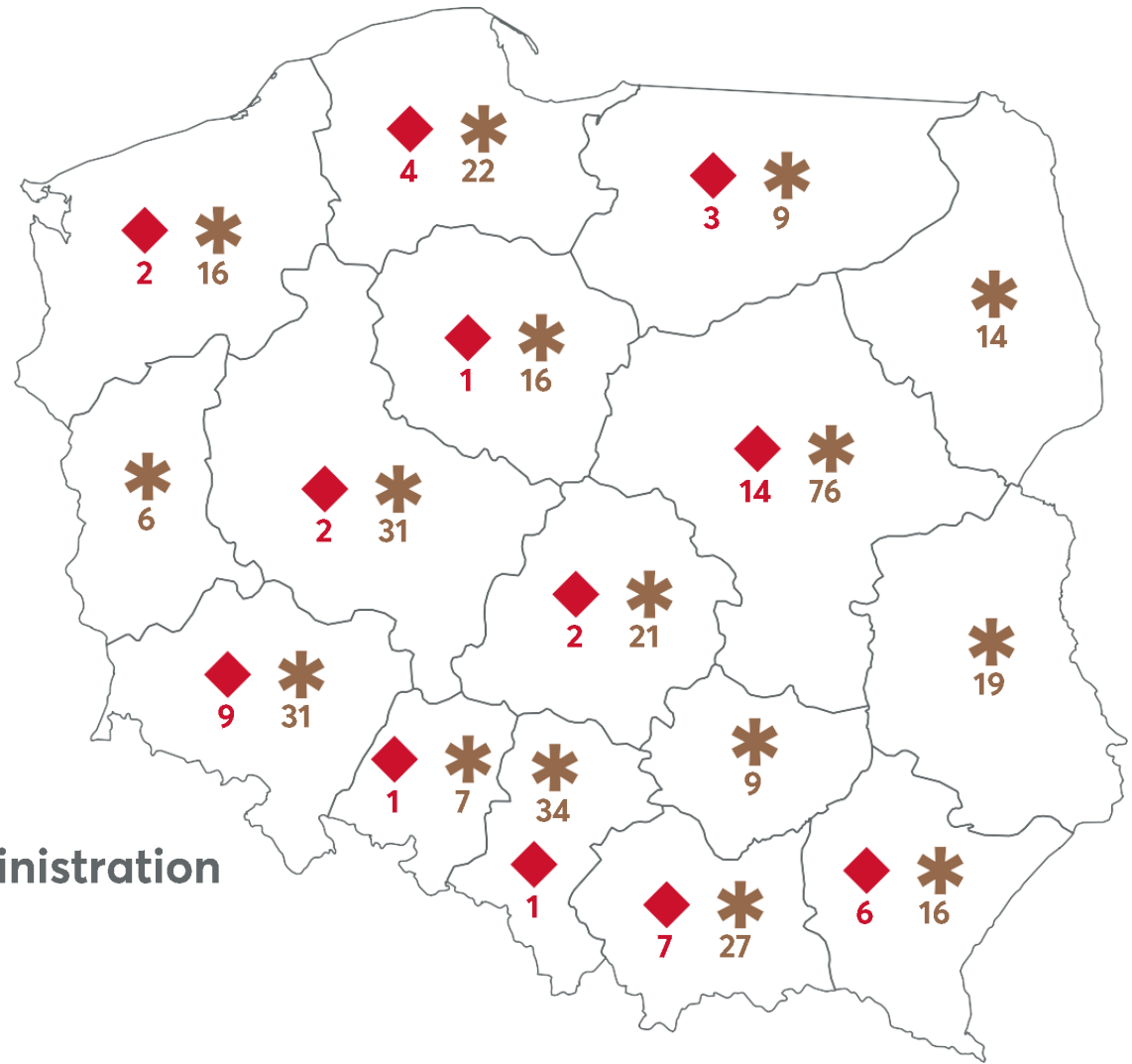
IT specialists

70,000 students
12,000 graduates per year



Business, law and administration

270,000 students
69,000 graduates per year



* Higher education institutions ♦ International or bilingual schools

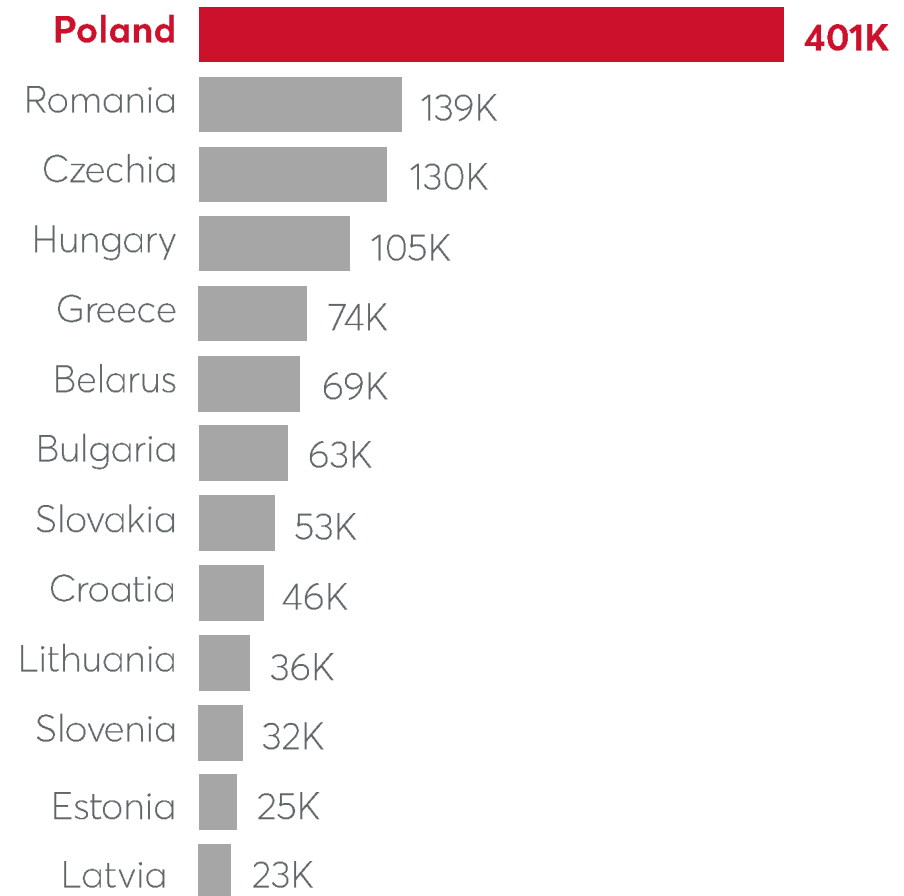
Well-educated specialists

Top-class human capital in ICT

Top-class programmers globally*

1. China
2. Russia
- 3. Poland** #1 in Java, #2 in Algorithms
4. Switzerland
5. Hungary #3 in Java, #3 in C++, #5 in Databases
6. Japan
7. Taiwan

Developer pool in CEE region**



*Hacker ranking 2016

** Stack Overflow report 2019

High-quality human capital Resilient economy

Poland takes 5th place among the EEMENA countries in The Global Talent Competitiveness Index (GTCI) Ranking.

Poland was among the fastest-growing economies in the European Union (EU) before the Coronavirus outbreak hit the global economy. Our country is successfully mitigating the social and economic impact of the pandemic, although its full impact remains uncertain.

Enhanced ICT infrastructure and digital skills are fundamental to tackle any future disruptions in the labour market. Countries with both public and private digital infrastructures and a tech-savvy workforce had better results in managing the disruptions caused by the lockdowns.

Digital economies defined by extensive ICT infrastructure and consistent R&D investment had a faster transition to remote working practises and limitation of non-necessary in-person contact, both in business and with public institution.

GTCI 2020 Ranking

COUNTRY	Over all EE-MENA 2020 Ranking
United Arab Emirates	1
Czech Republic	2
Slovenia	3
Slovakia	4
Poland	5
Greece	6
Hungary	7
Bulgaria	8
Serbia	9
Croatia	10
Romania	11
Turkey	12
Tunisia	13

Source: Inovantage Reading the workforce DNA of Eastern Europe, Middle East and North Africa, Adecco Group

*Eastern Europe, Middle East and North Africa (EEMENA) is one of the most dynamic and diverse regions in the world. With a total population of over 221 million people and a surface of 2 million km², in terms of size EEMENA is comparable with France, Germany, Italy and Spain put together (CW Europe); or Thailand, Malaysia, Vietnam and Cambodia put together (SE Asia).

Society of tech-savvy early adopters

Tech nation

1st

1st country in CEE
(13th globally) by
smartphone
penetration

2nd

2nd fastest
growing European
market for Revolut

**USD
0.7**

Cheapest mobile
data in CEE (USD
0.7 per 1GB)

90%

90% of card
payments in Poland
are contactless

Expertise in tailor-made solutions



The TenderHut Group is one of the fastest-growing IT companies in Poland. The capital group operates in three business areas: outsourcing, implementation of laboratory systems and venture building. The company is highly positioned in rankings such as the Financial Times 1000 and Deloitte.



Founded in 2016, dynamically growing software engineering company that offers comprehensive solutions to various industries, employs over 600 specialists. Ranked the 1st fastest growing technology company in Europe according to the Financial Times 1000.



Future Processing has been a software development partner to companies in the UK, Germany, Scandinavia and the US for 20 years. It employs around 900 experts who use technology to bring partners tangible results in reliable, high-quality, sustainable software delivered on time. In fact, customers rate our partnerships at 60 on the NPS scale (latest survey: 2020H2).



Creates innovative B2B banking solutions, including a co-authored mobile app IKO, twice recognized by Retail Banker International as the best mobile banking app in the world; Neontri received funding from Queen City Fintech in Charlotte, US.

*The companies were selected on the basis of PAIH's experts' assessment

Success stories

Fintech



The leading mobile payment solution in Poland created by „Polski Standard Płatności”, surpassing such brands as Google Pay or Apple Pay. In 6 years BLIK processed more than 1 billion transactions and is available to more than 16 million customers.

AI



Helps companies gain competitive advantages by providing AI-based end-to-end solutions, with an emphasis on computer vision, predictive analytics and natural language processing. CodiLime group invested in the company.

Gaming



Top global game producer with hit titles such as The Witcher and highly anticipated Cyberpunk 2077. One of the largest companies on the Warsaw Stock Exchange.

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Entrepreneurial spirit Poland's potential Unicorns



WORLD'S LARGEST ONLINE LEARNING COMMUNITY FOR STUDENTS & PARENTS

Industry: Education
Launch year: 2009
Employees: 300+

Funded i.a. by
Learn Capital,
Prosus & Naspers



BOOKING PLATFORM FOR BEAUTY AND HEALTH SERVICES

Industry: Wellness & Beauty
Launch year: 2014
Employees: 500+

Funded i.a. by
ENERN Investments,
Piton Capital,
OpenOcean,
Cat Rock Capital,
Sprints Capital

Vibrant tech start-up community

Entrepreneurial spirit



NCBR A Government institution overseeing the development of innovativeness



PARP with its 'Poland Prize', aimed at bringing foreign startups to Poland



PFR Ventures The CEE region's largest financial manager of investment funds



Startup Poland the main advocate and think-tank dedicated to startups in Poland



Cambridge Innovation Center PAIH's partner in the Poland.Business Harbour programme



Startup Hub Poland Our non-profit partner in the Poland.Business Harbour programme

as well as many other institutions...

*The companies were selected on the basis of PAIH's experts' assessment

The ICT sector in Poland

- In Poland, there are already around 50 thousand software companies of various sizes, even though the IT industry in our country is a relatively new but dynamically evolving one. The reasons for this is the constantly growing need for the development of IT and its services.
- According to PARP reports, the IT industry constitutes about 8% of Poland's GDP and currently employs over 430 thousand people.
- From January to May 2021, over 105 000 job offers for IT specialists were advertised on the Internet in Poland.

What makes Poland's ICT market so attractive?



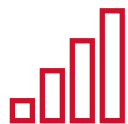
IT specialists have great skills

Polish pupils are among the youngest in the world to start acquiring coding skills



IT education

There are approx. 70 thousand Polish students on Computer Science and related courses annually. Poland is high in the rankings as a country with the most talented programmers



The industry is growing fast

The whole ICT industry grew by around 2.9% in 2019, and the income from the IT sector rose by around 4,6%

Overview of investment support incentives

Polish Investment Zone

Tax incentives available in all of Poland

EU Funds

Poland is to be the biggest beneficiary of the EU budget for 2021-2027 - EUR 160bn in subsidies and loans. EU Funds available for specific projects

Cash grants

Government cash grants between 5-25% of investment costs, depending on the location, size of the company and type of the project

Cash Grant Programme

In order to meet business expectations and encourage companies to invest despite the Covid-19 pandemic, in 2021 the Council of Ministers adopted changes to the Programme for supporting investments of significant importance to the Polish economy for the years 2011-2030.

Support is provided in the form of a grant, based on an agreement concluded between the Minister responsible for the economy and the investor. The quantitative criteria have been lowered and the qualitative criteria for the evaluation of investments have been modified and aligned with the criteria within the Polish Investment Zone. Assessment as to the fulfilment of the required criteria has been simplified and made more precise.

Available tax exemptions



CIT exemption

Available in all of Poland
10-15 years tax free



R&D tax relief

Up to 250% deductions from income tax for R&D Centres
An easy-to-apply tax instrument



RET exemption

Available as a local exemption tool



5% tax on IP-related income

Long-term tax benefit

The Polish Investment and Trade Agency

The Polish Investment and Trade Agency's (PAIH) mission as a government agency is:

- * To enable small- and medium-sized companies to reach their full potential in exporting their products and services around the world
- * To support potential investors in Poland by providing comprehensive and up-to-date information services regarding legal and tax aspects, location and human capital, as well as on the available financial incentives
- * To promote 'Poland as a Brand'

How we can help

PAIH's experienced team of experts with a hands-on approach and excellent understanding of investor's needs will ensure that your investment process is as fast and smooth as possible



Information packages
(macroeconomic, HR, legal, sectoral data)



Information on investment incentives



Location consulting
(help in choosing the right location for the investment)



List of available investment properties



Organisation of site visits for prospective investors



Identification of potential suppliers and subcontractors



Organisation of B2B meetings



Facilitation of contacts with local and State authorities

Contact us

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This brochure was created in cooperation with
The Adecco Group

Strategy and Economic Promotion Department
September, 2021

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