POLISH INFORMATION
AND FOREIGN INVESTMENT AGENCY

Business opportunities in Poland

Latvian – Polish Business Forum in Warsaw

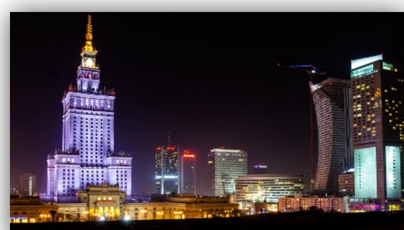
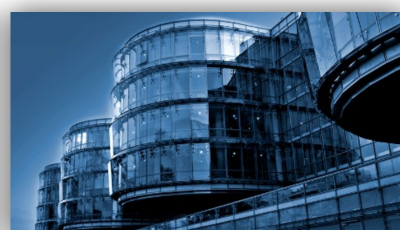
Tomasz Pisula
President of the Board

Invest in Poland

I. Investment climate in Poland

I. Investment climate
I.1. Poland – Key Facts

- **6th largest in the EU**: area, population and economy
- **GDP per capita:** USD 26,403 (PPP, 2015) – *IMF*
- **GDP growth** (*at market prices*) 2008-2015: **Poland 40% vs the EU: 12,5%**
- **largest EU funds beneficiary:** ~100 bn EUR in years 2014-2020
- **low public debt:** 51.0% of the GDP v. the EU average 87.8%
- **FDI stock: EUR 167 bn** as of the end of 2015
- membership: **EU, NATO, OECD, WTO, Schengen Zone, AIIB**

Source: IMF, World Economic Outlook, 2017

I. Investment climate
I.2. Competitive advantages

Highly skilled and young labor force

25 million inhabitants under age of 50

Healthy unemployment level of 8.2%

Big internal market

6th biggest country in the EU (area, population)

Unlimited access to the EU market of 510 million inhabitants

Quickly developing infrastructure

Over 1200 km high speed roads under construction

4.4 times more high speed roads than before joining EU

Academic hub

1.4 million students and

400 thousand graduates each year

Business friendly environment

1st place in the CEE region – the most attractive country to establish operations

Katowice SEZ - best free zone in Europe in 2015 and 2016

Poland advanced in Doing Business ranking by 50 positions since 2012

Attractive incentives system

250 million m^2 of land incorporated in SEZ

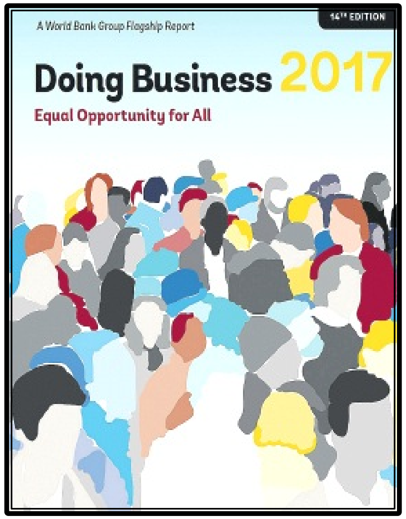
Government Grants for strategic projects

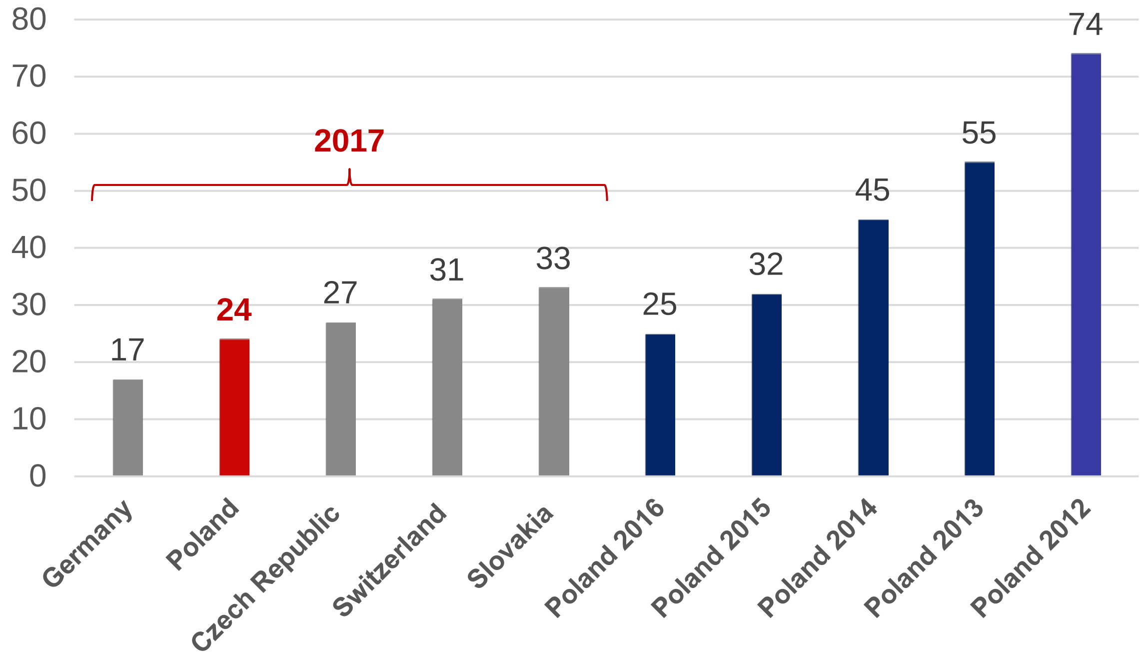
50% public aid intensity in Eastern Poland

4

I. Investment climate
I.3. International rankings

DOING BUSINESS 2017 RANK	DOING BUSINESS 2016 RANK	DOING BUSINESS 2015 RANK	DOING BUSINESS 2014 RANK	DOING BUSINESS 2013 RANK	DOING BUSINESS 2012 RANK
24	25	32	45	55	74





Source: World Bank, Doing Business

Invest in Poland

I. Investment climate
I.4. Companies that have chosen Poland (I)

AUTOMOTIVE

DELPHI, GEDIA, VW, TOYOTA, MAN, SOLARIS

CooperStandard, BorgWarner, faurecia, PILKINGTON, Autoliv

HOUSEHOLD APPLIANCES

B/S/H/, INDESIT, SAMSUNG, Whirlpool

PHILIPS, Electrolux, Teka, LG

ELECTRONICS

TCL, TPV TPV TECHNOLOGY LIMITED, DELL, FLEXTRONICS, SHARP

TOSHIBA Leading Innovation, JABIL, LG Display

Invest in Poland

I. Investment climate
I.5. Companies that have chosen Poland (II)

AEROSPACE

AgustaWestland – A Finmeccanica Company
Hispano-Suiza Polska – SAFRAN Group
United Technologies
MTU Aero Engines
Pratt & Whitney Kalisz
AIRBUS MILITARY
PZL Mielec – A Sikorsky Company
VAC AERO
GE Aviation

BUSINESS SERVICES SECTOR

PerkinElmer – For the Better
FUJITSU
CAPITA
hp
IBM
STATE STREET
Infosys
Atos
citi
UniCredit
METRO SERVICES
ups

R & D

intel
3M
Nokia Siemens Networks
ADVA Optical Networking
GE
SAMSUNG ELECTRONICS
WABCO
DOLBY
MOTOROLA
TRW
PÖYRY
webanywhere

Invest in Poland

I. Investment climate
I.6. Trade and investment with Latvia

There are **61 entities with Latvian capital registered in Poland**

In 2015 **Polish-Latvian turnover exceeded EUR1,8 bn,** an **11% decrease y/y;** After 11 months of 2016 **turnover amounted to EUR 1.5 bn** (slight decrease as compared to 2015)

Cumulated **FDI stock of Latvian companies in Poland** amounts to EUR 63 m (end of 2015)

Cumulated **FDI stock of Polish companies in Latvia** amounts to EUR 83 m (end of 2015)

I. Investment climate
I.7. Recent investment announcements in Poland

Invest in Poland

zalando

Gardno - logistics
EUR 200 million

DAIMLER

Jawor – automotive
EUR 300 million

LG Chem

Biskupice – EV battery plant
EUR 300 million

BOMBARDIER TRANSPORTATION

Wrocław – **high speed train body**
EUR 60 million

MABUCHI MOTOR

Bochnia – **automotive**
EUR 85 million

TOYOTA

Wałbrzych and Jelcz – Laskowice – **automotive**
EUR 150 million

Bielsko - Biała – **automotive**
EUR 250 million

FPT POWERTRAIN TECHNOLOGIES

Warsaw – financial services

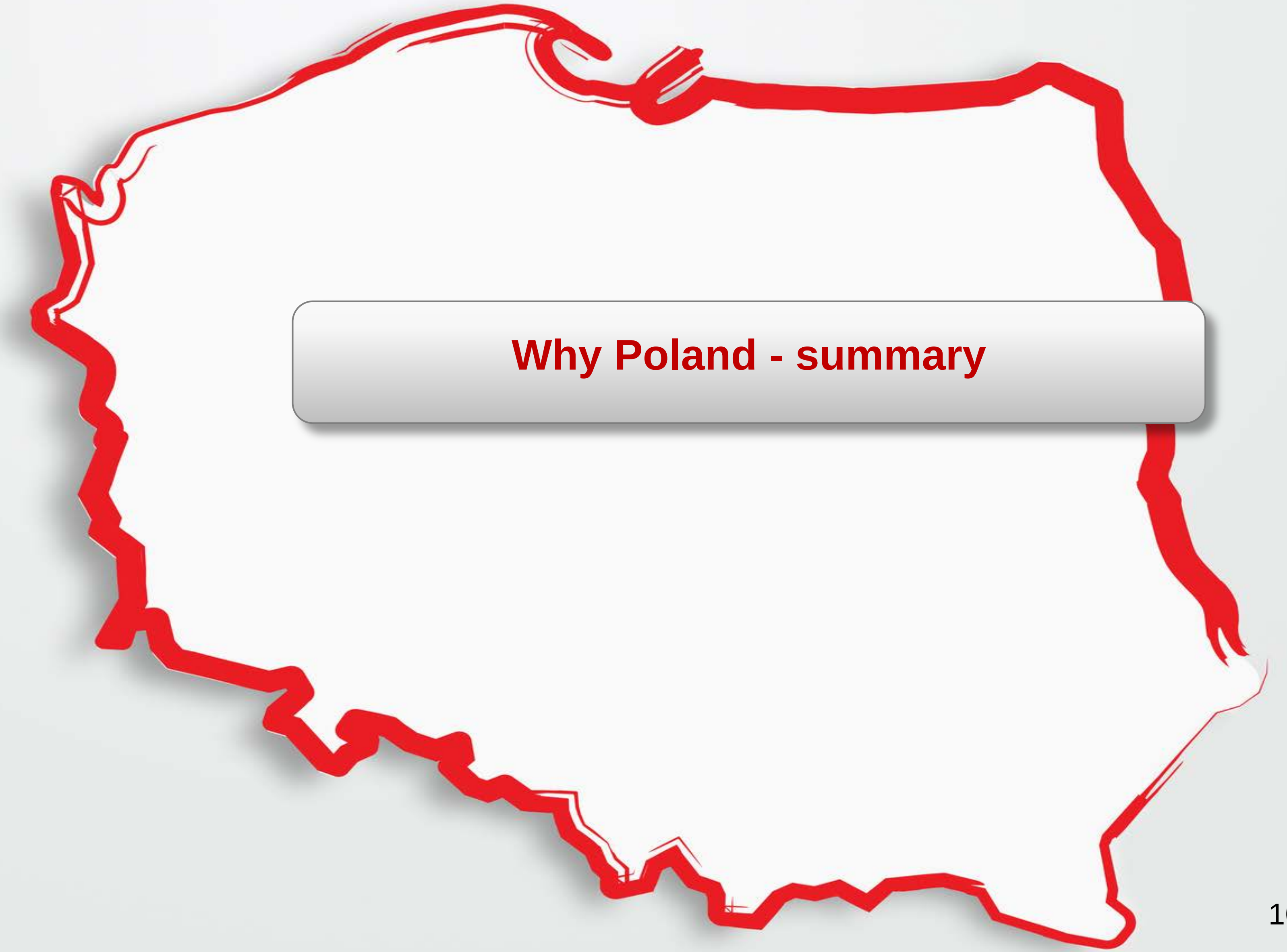
UBS
Morgan Stanley
CREDIT SUISSE

Dąbrowa Górnicza – automotive
EUR 100 million

brembo

Ropczyce – aviation
EUR 100 million

Rolls-Royce
SAFRAN Hispano-Suiza
AERO GEARBOX INTERNATIONAL



Why Poland - summary

Summary – Poland

- **Credibility** – 97% of foreign investors would invest again in Poland (PAIiIZ/HSBC), 96% - in AHK research
- **Stability** – significant increase in employment generated by the FDI, in spite of the political changes
- **Productivity** – high motivation, works ethics, hard-working and creativity of the Polish workforce
- **Predictability** – foreign investors are welcome, no dramatic changes in the macro policy, no Brexit in Poland

Category	January, 2017
PAIiIZ pipeline	198
Planned investment expenditures (EUR million)	4 289.8
Targeted employment	51 325

Source: PAIiIZ

Invest in Poland

Looking forward to cooperate!

www.paiz.gov.pl

invest@paiz.gov.pl

00-585 Warszawa, ul. Bagatela 12
tel. (+48 22) 334 98 00, fax (+48 22) 334 99 99
e-mail: invest@paiz.gov.pl