

**POLISH INFORMATION
AND FOREIGN INVESTMENT AGENCY**

**Market Perception & Reality
Poland: infrastructure, environment, incentives**

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Competitive Advantages



Strategic location and strong economic fundamentals



Availability of skilled human resources



Mature Business Services destination



Effective incentives system

Strategic location and economic fundamentals



- nearshore advantage: servicing Western Europe
- European Union & Schengen Zone member: easy access to clients
- largest EU funding beneficiary – **EUR 67 bn**
- GDP growth 2008-2012: **25.1%** (2009 - 1.6%, 2010 - 3.9%, 2011 - 4.3%, 2012 – 2.0%, 2013F – 1.8%, 2014F – 2.6%)
- dynamically growing domestic market of 38.5 m of inhabitants
- inflation rate under control: **1.0%** in March 2013 (y-o-y)
- low public debt (**55%** v. the EU average 80%)
- FDI stock: **150 bn EUR** as of 2011
- sound and rapidly growing financial system



Availability of skilled human resources

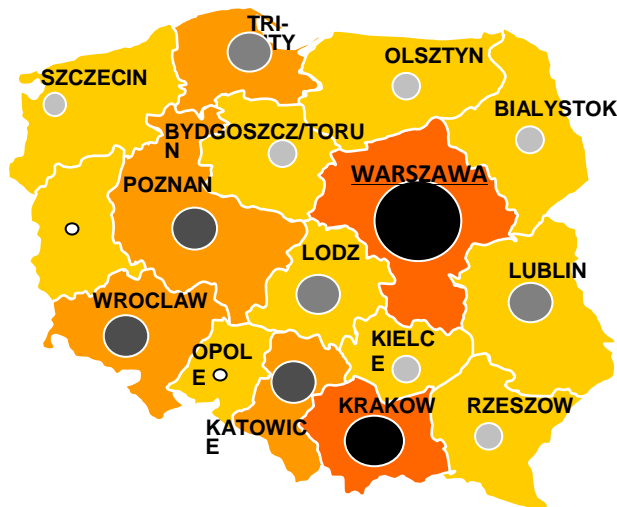
Labour market assets

- 38 m of inhabitants = 38% of CEE region population
- over 56 % of population younger than 40
- no talent shortage problem: only 4% of employers have troubles filling vacancies
- increasing mobility of the society
- growing labour productivity - 2-3% per year
- high quality / cost ratio

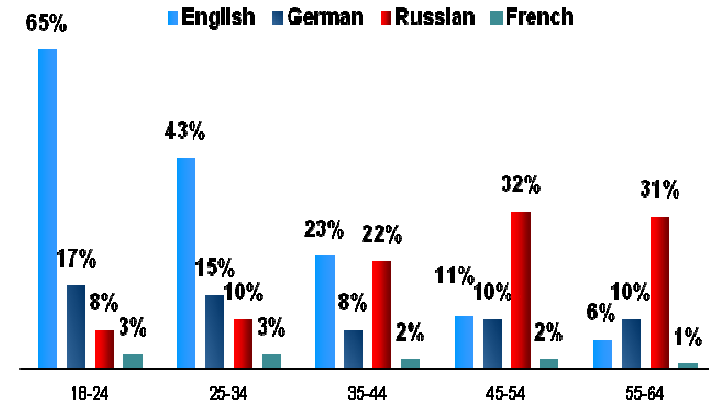
International recognition



Academic centers



Multilingual population



Students

- 2 m students = 11% of all EU students
- almost to 500 000 graduates each year
- language proficiency - more than 90% of students speak foreign languages
- 460 higher education institutions
- 200 different majors taught
- growing number of science students
- Polish students receive numerous internationally acknowledged prizes

Mature Business Services destination

Cause

- time zone affinity with Western Europe
- excellent cultural and linguistic compatibility with Western Europe
- vast multilingual talent pool
- outstanding education system with high rate of employability
- competitive cost base
- diverse choice of suitable locations (17 main academic cities)
- accessibility (airports, railways, roads)
- availability of modern office premises
- reliable infrastructure (power, internet)



Effect / Trends

- 380 centers with foreign shareholding, service available in 34+ languages covering Europe, Asia & both Americas
- 140 000 employees in IT services & 100 000 employees in SSC/BPO/ITO centers
- 20% employment growth rate of the sector
- variety of host locations - 7 big&10 mid-size locations
- increasing complexity of processes



Effective incentives system

✓ **Tax breaks**

- CIT exemption in Special Economic Zone
- CIT relief for acquisition of new technology
- Real estate tax exemption

✓ **Cash support**

- Government grants
- Cash grants available through EU Funds



The EU budget: present and future financial perspective

2007 – 2013

Total: 975 bn EUR

Poland: 69 bn EUR (7%)



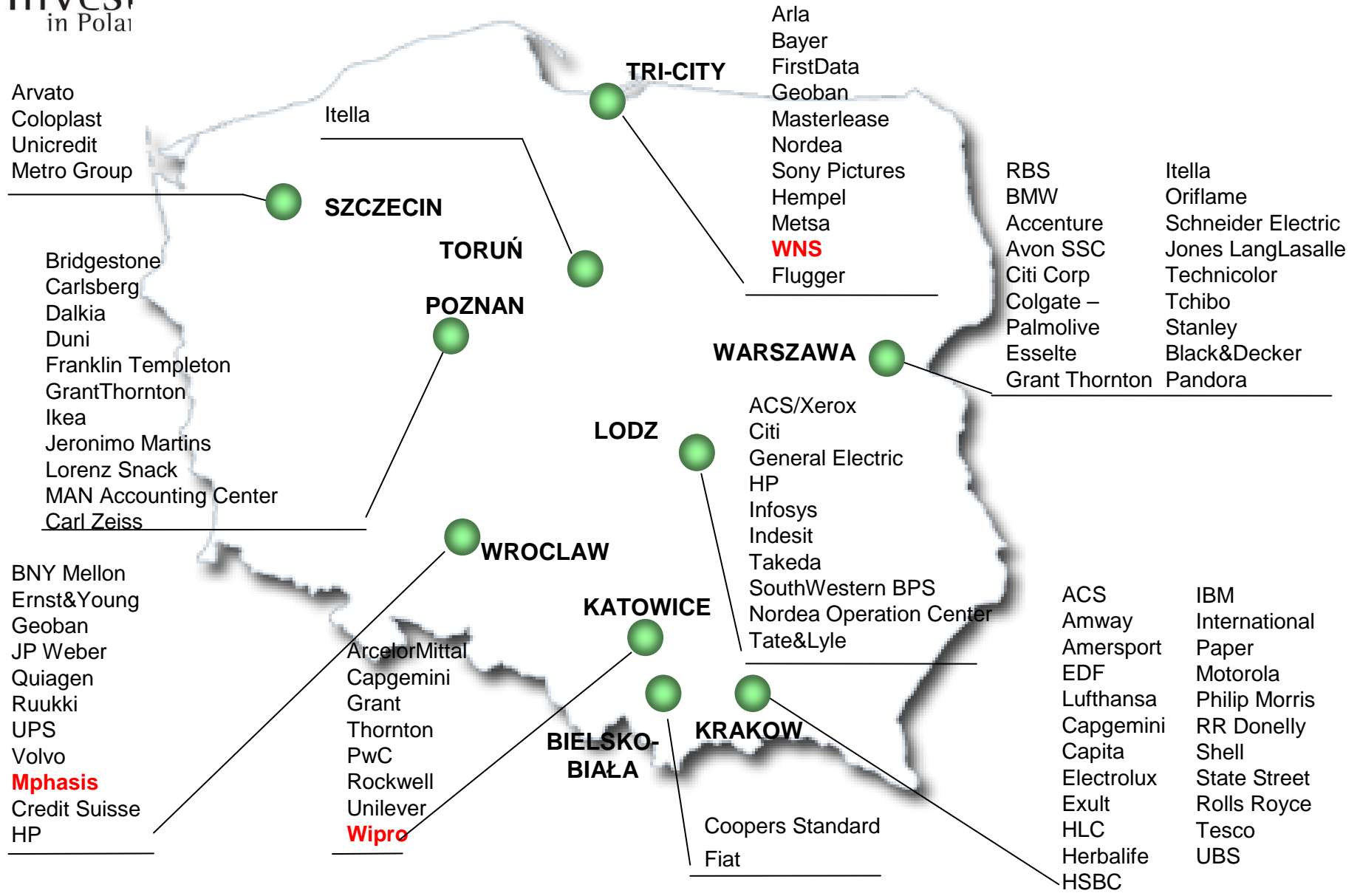
2014 – 2020

Total: 960 bn EUR

Poland: 72.9 bn EUR (7.6%)



Finance and Accounting (F&A) Centres in Poland





Invest
in Poland

IT centres in Poland

Arvato
BL Stream
Gamelion
Tieto

Alcatel Lucent
Atos Origin

TRI-CITY

Acxiom
Compuware
Fineos
Go Yello
IBM
Jeppesen
Kainos
Lufthansa
Intel
Synopsis
YDP
Wipro
Misys

Acxiom
Bosch
Compuware
Accenture
Exact Software
GlaxoSmithKline
HP
Digitech
IFS
Lionbridge
Microsoft

Mobica
Opera
Software
Datev
P&G
Roche
Sagem
Symantec
Oracle
SAP
Samsung

Arvato Services
Ciber
GlaxoSmithKline
HolidayCheck
Lorenz Snack
Mentor Graphics
Roche
Samsung
Savvis

SZCZECIN

BYDGOSZCZ

POZNAN

WARSZAWA

ABB
Accenture
Mobica
Transition Technologies
Rule Financial
Teleca
Infosys
Fujitsu
TomTom
BMS
Samsung R&D

ACS
Appriso
Akamai
Capgemini
Capita
Rolls Royce
IBM
CGI
Exult
HCL
Kenexa
Luxoft
Electrolux
Philip Morris
Motorola
Google
UBS

LODZ

Capgemini
IBM
Luxoft
Infusion
AtoS
Red Knee
Tieto
Volvo
Nokia Siemens
Opera Software
Dolby
Becton Dickinson
Siemens
Viessmann

Capgemini
Cyclad
ING
Kroll Ontrack
Oracle
Ericcon
Steria
DisplayLink
MentorGraphics
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