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



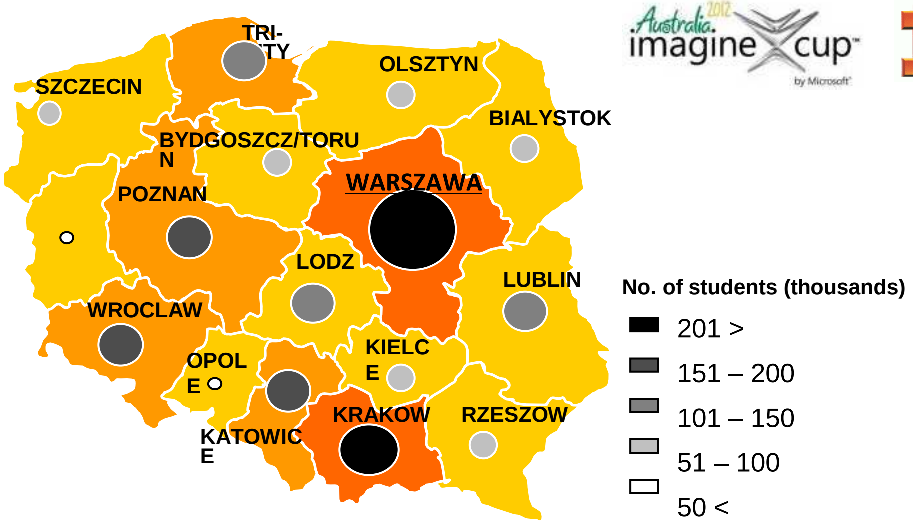

Availability of skilled human resources

Labour market assets

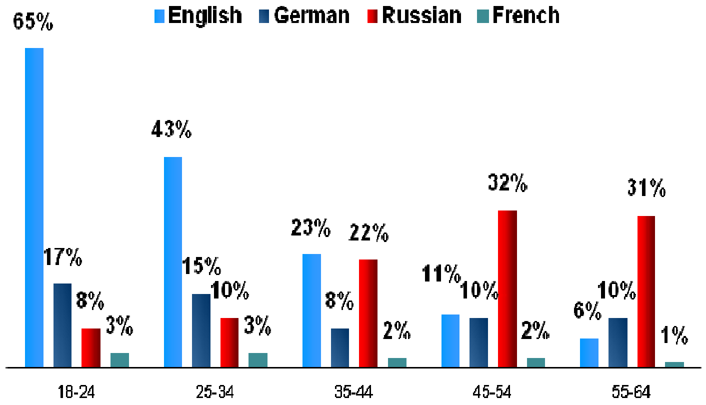
- 38 m of inhabitants = 38% of CEE region population
- over 56 % of population younger than 40
- no talent shortage problem: only 4% of employers have troubles filling vacancies
- increasing mobility of the society
- growing labour productivity - 2-3% per year
- high quality / cost ratio

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

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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***

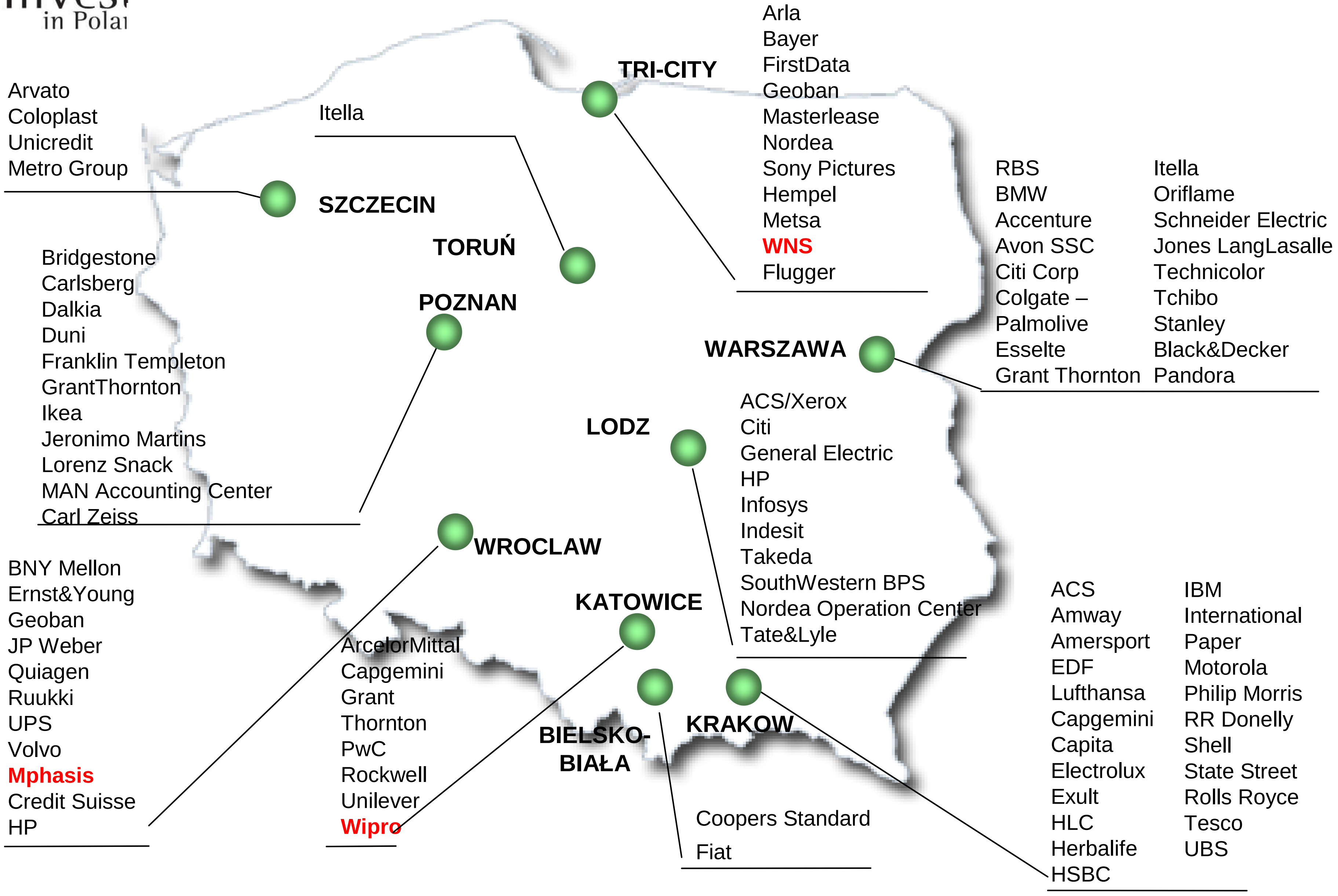
- **Government grants**
- **Cash grants available through EU Funds**

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 Acounting (F&A) Centres in Poland



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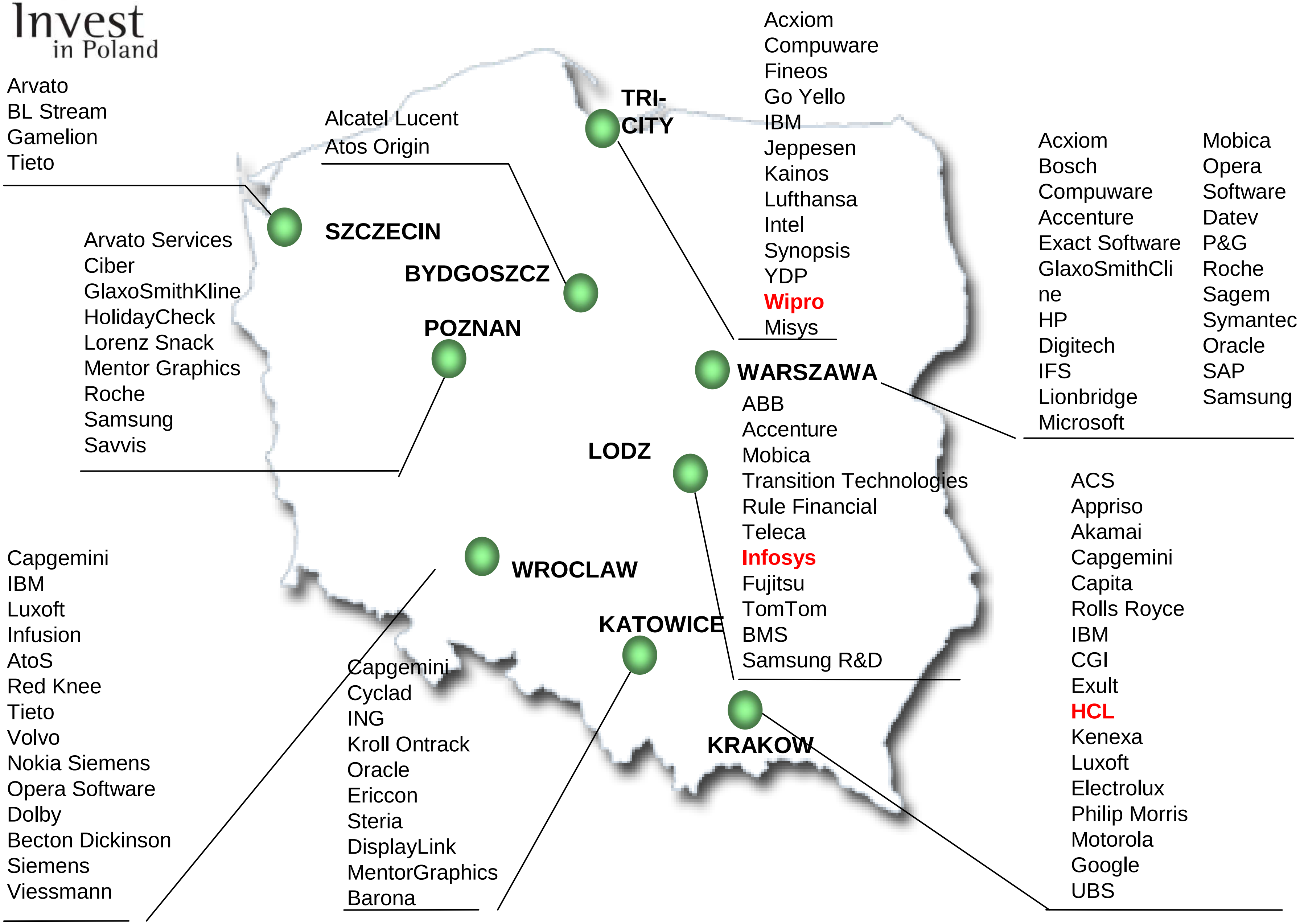
IT centres in Poland



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Thank you for your attention

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