

# Discover Poland

## Thriving Hub for Investment with Strong State Backing

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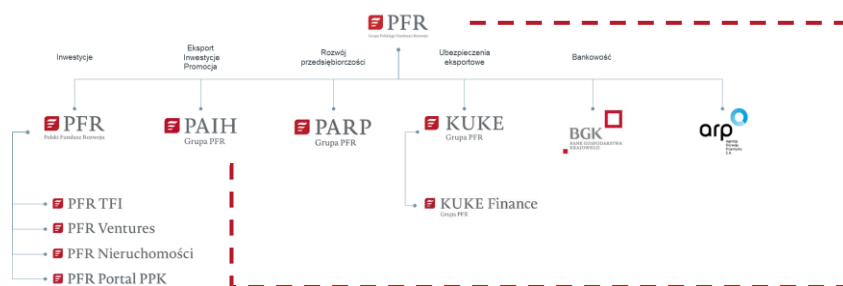
Polish Investment and Trade Agency

**Poland. Business Forward**



# Synergy Effect

## Complementary Offer of the PFR Group



## The three key areas:

### Export

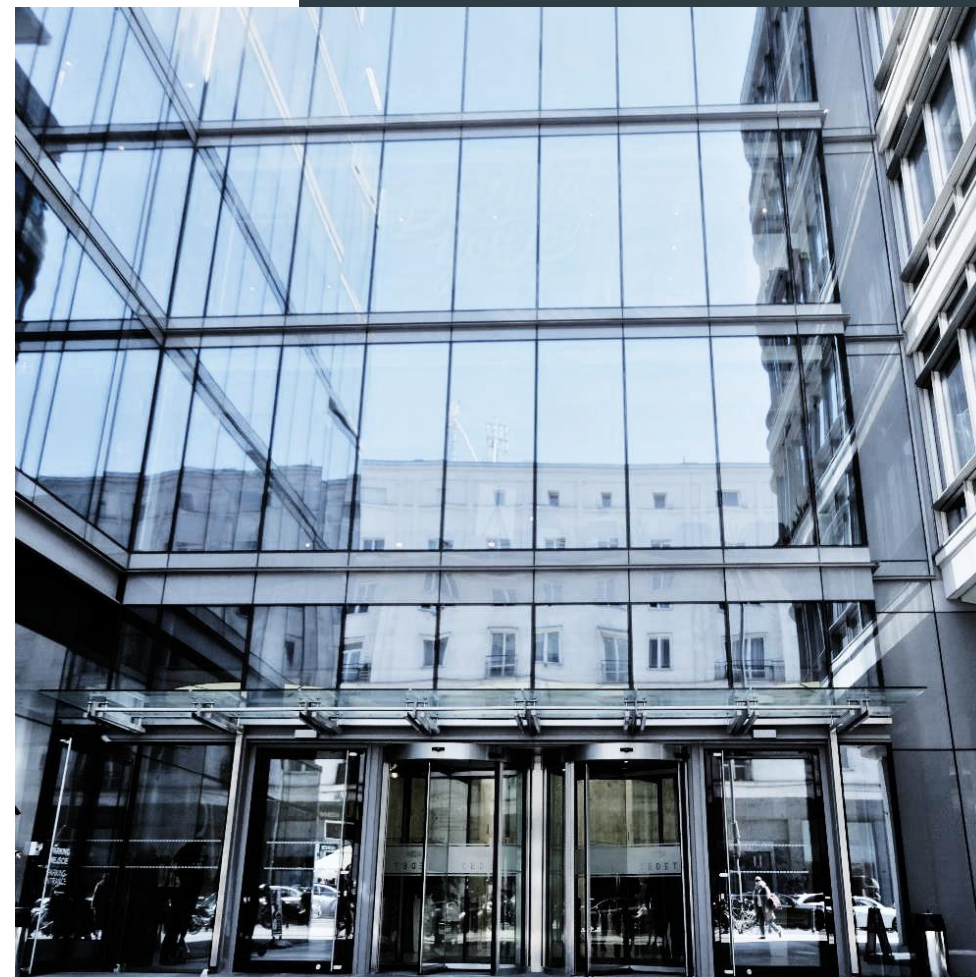
Supporting Polish Exports with particular emphasis on SMEs.

### Investments

Facilitating investments in Poland and abroad. Support of FDI in Poland.

### Partnership Promotion Education

Cooperation with public administration and business environment institutions in the implementation of joint projects.






# Where to find us

Network of PAIH's Foreign Trade Offices

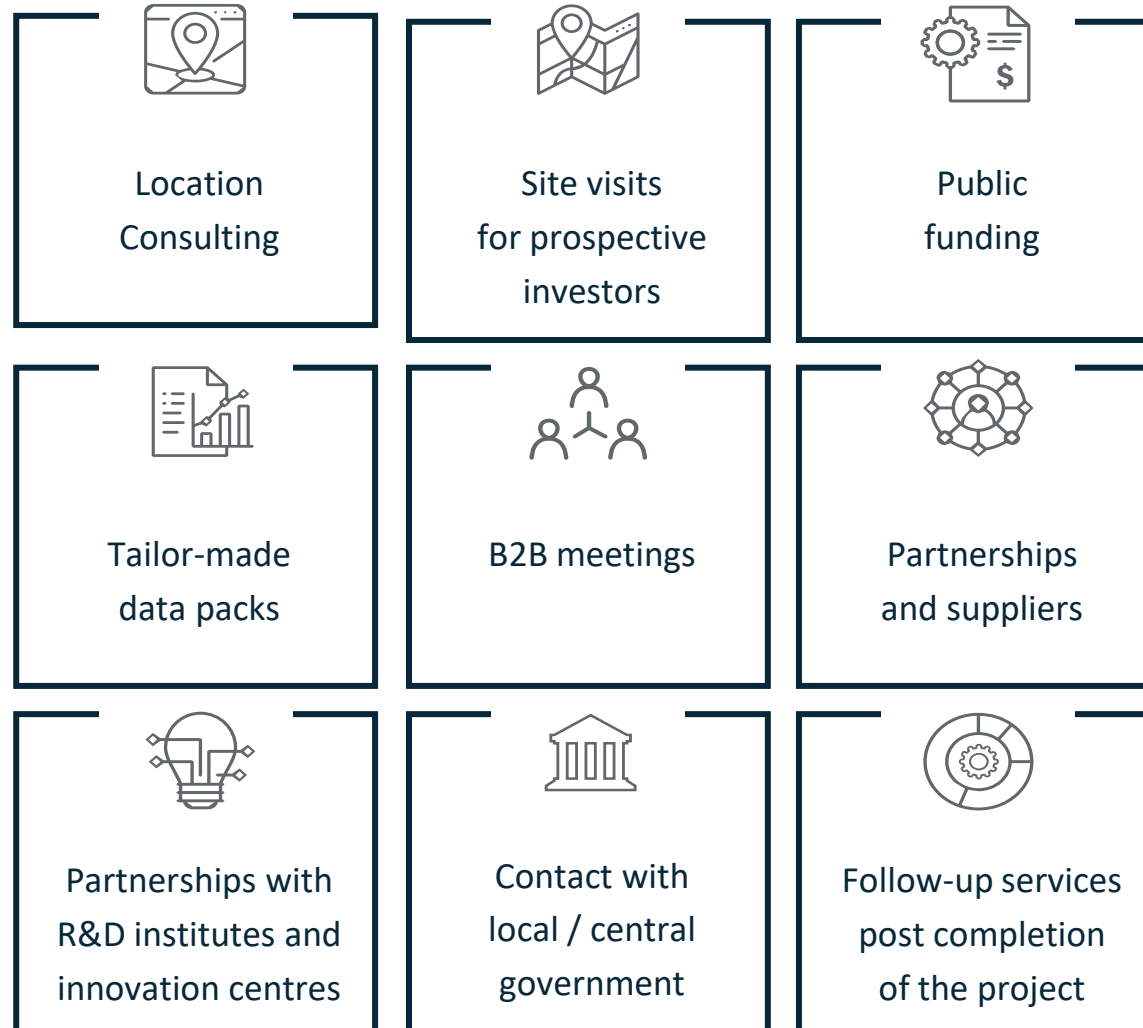


## Our competencies:

-  Knowledge of local specifics, culture and business conditions.
-  Knowledge of local languages.
-  Identification of key industries in individual markets.

# Planning to Invest in Poland?

## PAIH's Offer for Investors



The Polish Investment and Trade Agency (PAIH) is a state-owned organization supporting FDIs in Poland.

Our experienced team with a practical attitude and excellent business acumen will ensure your investment process is as smooth as possible, with the assistance of a dedicated Project Manager.

## SUPPORT TOOLS



[Investment site database](#)



[Cash Grant Program](#)

# Investment Support Department



25 Department Members, including 4 public aid experts



3 teams dedicated for various projects: Manufacturing, BSS + R&D, and Public Aid



Direct cooperation and work under the Ministry of Economic Development

## Current pipeline

Active projects

**126**

From various sectors

Declared value

**9.6**

bln EUR

Declared employment

**21k**

New FTEs

# Largest investment supported by PAIH

2022-2023



# Vast variety of key industries and strong client base



Automotive  
and  
electromobility



Aerospace



Business  
Services Sector



Research &  
Development



Food  
processing



Electronics and  
white goods

- **253 000** employed
- **10.5%** total share in manufacturing
- **1000+** automotive companies
- EU's **e-mobility hub**
- **40 000** employed
- **140** aviation companies
- strong **aviation clusters**
- **400 000** employed
- **1800+** BSS centers
- **43%** employment growth in the past 4 years
- **320 000** employed
- **100%** growth in the past 10 years
- **397 000** employed
- **11.3%** of Poland's GDP
- **27 bn EUR** exports value
- **100 000** employed
- **14.2 bn EUR** sales value
- **No. 1 in the EU** producer of large white goods





Polish Investment  
& Trade Agency  
PFR Group

# Why Poland

Poland. **Business Forward**



# Strategic location

in the heart of Europe

4 Pan European Corridors

4<sup>th</sup> Largest railway network in Europe

5<sup>th</sup> Longest highway network in Europe

5<sup>th</sup> Biggest sea port in the European Union

1<sup>st</sup> Freight transport in the European Union



# Poland – the rise of Europe’s Overlooked Powerhouse

Poland in the eyes of The Economist article (June 1st 2025)

- ✓ Income per capita ↑ **3×** since 1995
- ✓ Average GDP growth ≈ **4 % per year**
- ✓ Defence spending > **4 % of GDP**,  
with a > 5 % target for 2026
- ✓ Net migration **positive** – Poles are coming back home
- ✓ **3rd-largest** army in NATO

## The Economist

UK-EU: No reset, but a start

America’s assault on science

The man with a plan for Vietnam

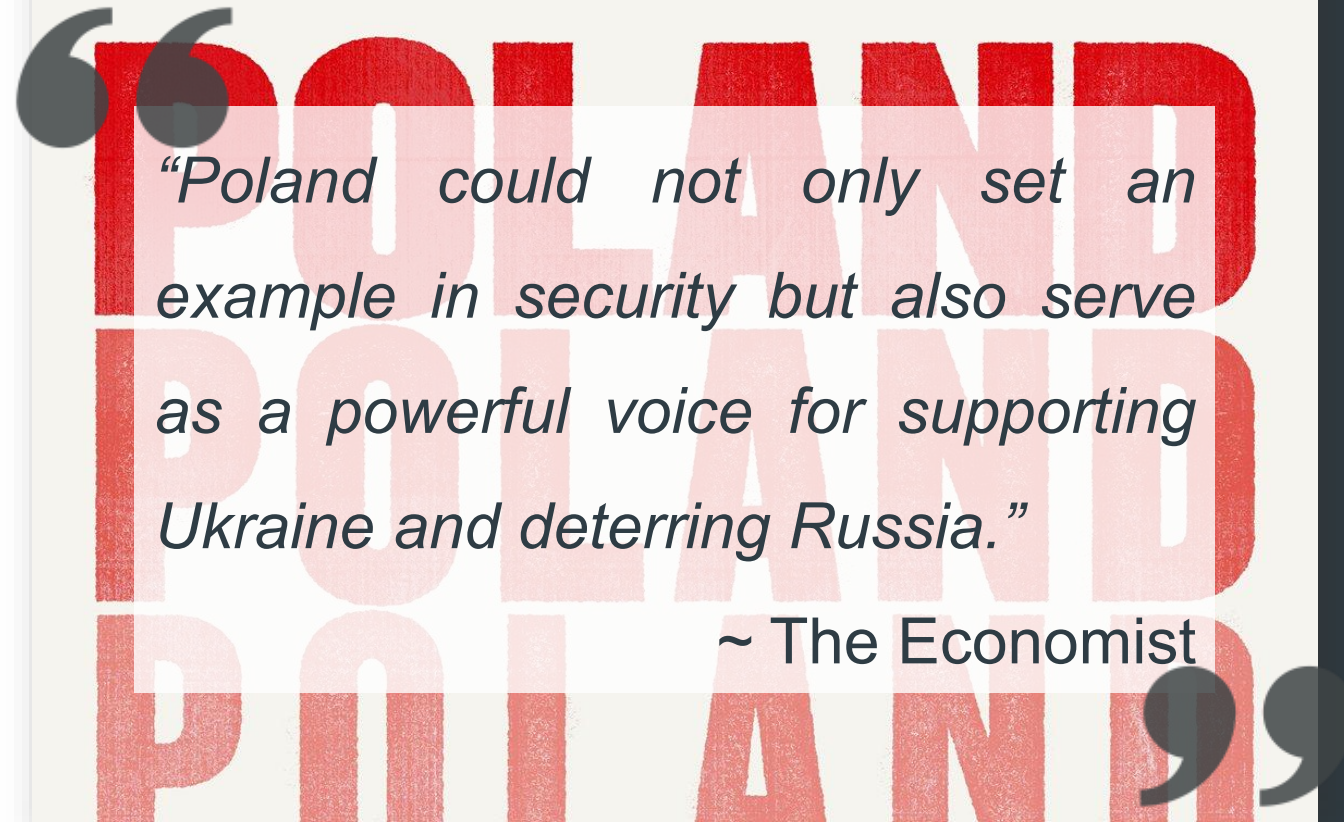
Can Jamie Dimon create a \$1trn bank?

MAY 24TH-30TH 2025

### The remarkable rise of

*“Poland could not only set an example in security but also serve as a powerful voice for supporting Ukraine and deterring Russia.”*

~ The Economist



# Poland in rankings

CEE, Europe, the World

# #1

in CEE  
in terms of  
FDI attractiveness

# #1

in EU  
in Emerging Innovators of  
the European Innovation  
Scoreboard 2024

# #1

in Europe  
in Best innovation zones -  
Global Free Zones of the  
Year 2024 (Cracow)

# #3

in Eastern Europe:  
Quality of Life  
Index 2025

# #7

in the world:  
FDI Confidence Index  
among emerging markets

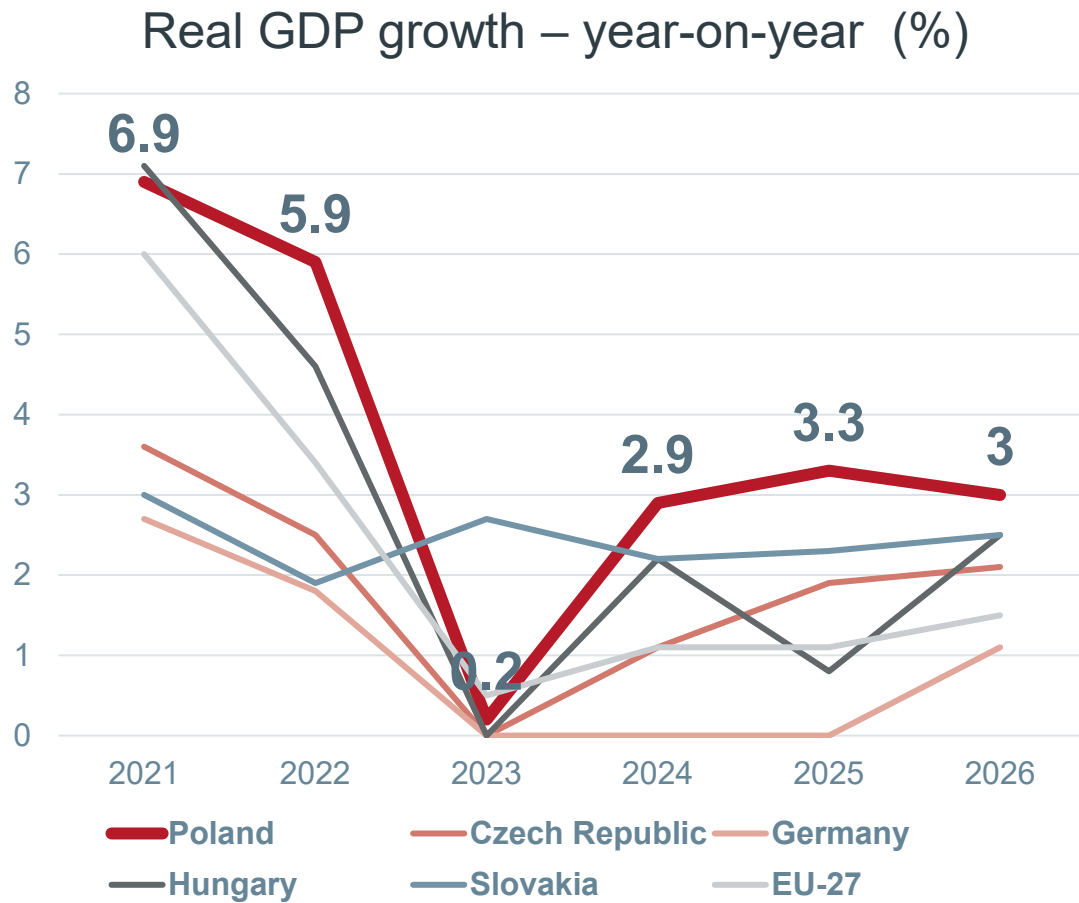
# #1

in Europe  
in Best industrial zones -  
Global Free Zones of the  
Year 2024 (Katowice)

Poland consistently punches above its weight in international league tables, topping the Emerging Innovators group and placing in the OECD's top tier for engineering talent and near-shoring appeal. Together, these rankings show a country that has become an FDI magnet, a growing tech hub, and a key manufacturing bridge between Western Europe and the East.

# Poland – Sovereign Credit Ratings

Status as of June 2025



Poland. Business Forward | [paih.gov.pl](http://paih.gov.pl)

Long-Term Rating

**MOODY'S**

**A2** ↗

**FitchRatings**

**A-** ↗

**S&P Global**

**A-** ↗

# Poland's Human Capital



## Vast pool of highly skilled labor

35% of the working population with higher education



## Well educated

1.2 million students (25% in engineering related subjects)

Poland is ranked high in EU regarding **STEM Graduates**, and as a leader of female in STEM



## Knowledge of foreign languages

13th globally in English proficiency  
6th place for Poland among OECD countries in terms of students' mathematical and language competencies



## Young Population

63% of the population in production age



## Innovative consumers

Progressive consumers, open to tech innovations and fond of modern banking solutions



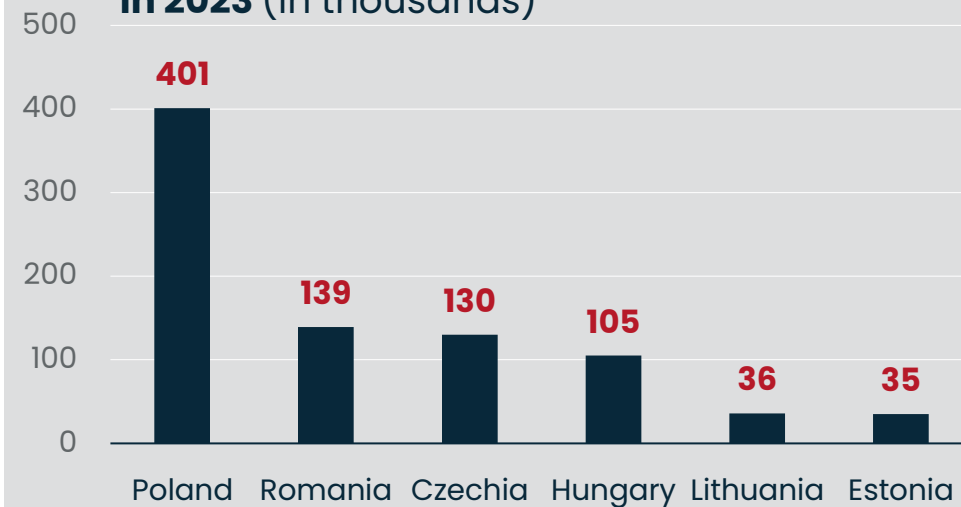
## Programming experts

Polish programmers are among the world's best  
3rd in Global Developer Ranking of Hacker Rank  
554,000 ICT employees in Poland in 2020

**1st** in CEE  
**5th** in EU  
most populous country



## Number of software developers in CEE in 2023 (in thousands)



# Higher Education



- 20** universities
- 28** technical universities
- 37** economic universities
- 34** state vocational higher schools
- 200+** private higher education institutions



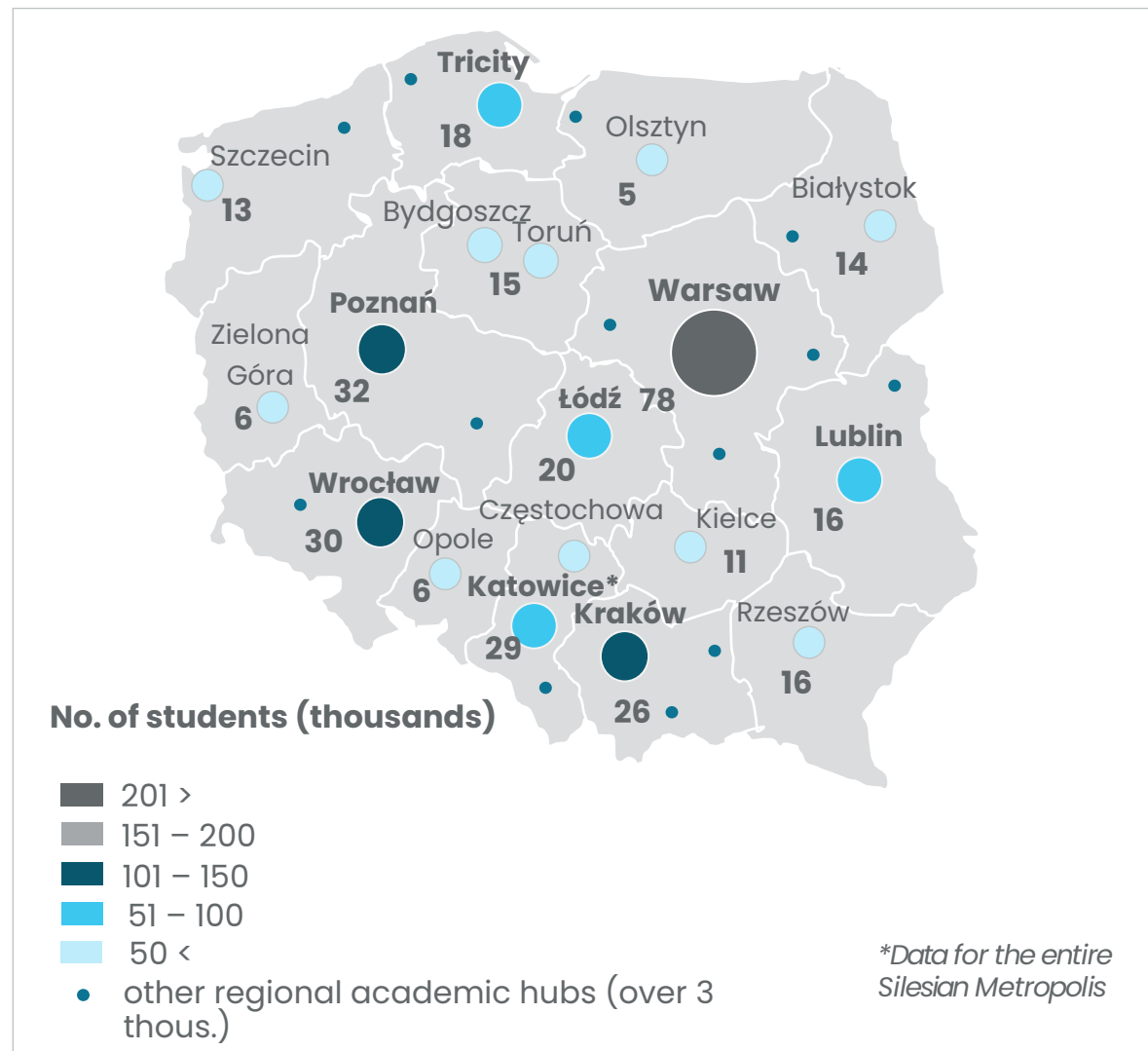
- 1.2 M** students (2023)
  - 156k** engineering & manufacturing students
  - 74k** ICT students
  - 281k** business & administration students



- 292k** graduates (2023)
  - 39k** engineering & manufacturing graduates
  - 11k** ICT graduates
  - 38k** business & administration graduates



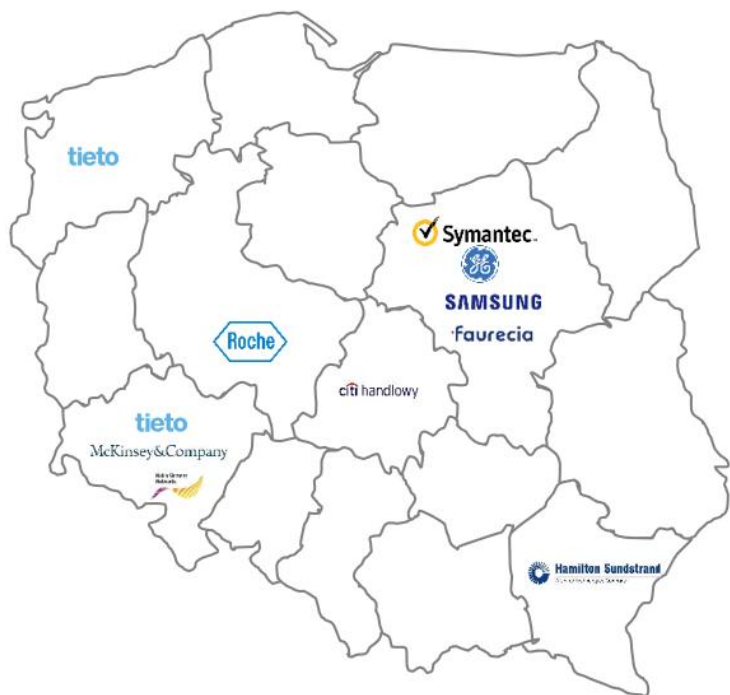
Over **107k** foreign students and **17k Foreign graduates** (2023) of which: 76K from Europe, 18k from Asia



# Dynamic growth of R&D centers since 2010

Poland – innovation hub in Central Europe for global players

2010



now



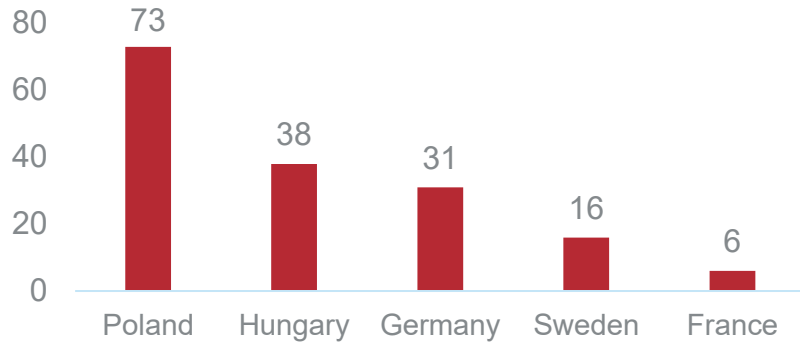
Increasing investments in R&D and innovations by the global and local players including:

Astra Zeneca, Roche, GE Healthcare, GSK, Samsung, LG Electronics, Gedeon Richter, Selvita, Polpharma, Bayer (Digital Hub)

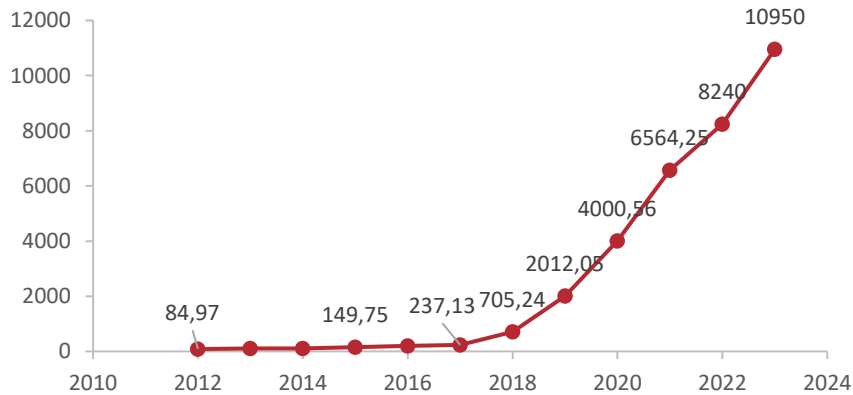
# Lithium-ion batteries market in Poland

## Poland as lithium-ion battery exporter

2022 Battery cell manufacturing capacity in the EU, GWh



Value of lithium-ion batteries exported from Poland from 2012 to 2023 (in million EUR)



Source: Statista

**100x  
increase  
in 10 years**

## Poland as lithium-ion battery exporter

In order to maintain the Polish's leading position in the world ranking, it is necessary to double the production capacity by 2027 – it should exceed 200 GWh



# Electronics & Semiconductors

## Why Poland?

### Advantages



**Prime location** – 3 h drive Wrocław → TSMC Dresden; gateway between German & Czech fabs; part of the Future European Semiconductors Valley and Supply Chain for TSMC



**Cost edge** – lowest operating costs among EU tech hubs (Kearney 2024)



**Ready market** – dense automotive & e-mobility cluster in Silesia / Lower Silesia



**Policy tailwind** – EU Chips Act funds + national FENG 2021-27 & Horizon Europe grants

**480 +**

EMS / electronics companies,  
64 000 jobs → Top-5 EMS hub in Europe

**€ 9.3 bn**

annual electronics output;  
cumulative FDI

**€ 1.4 bn**

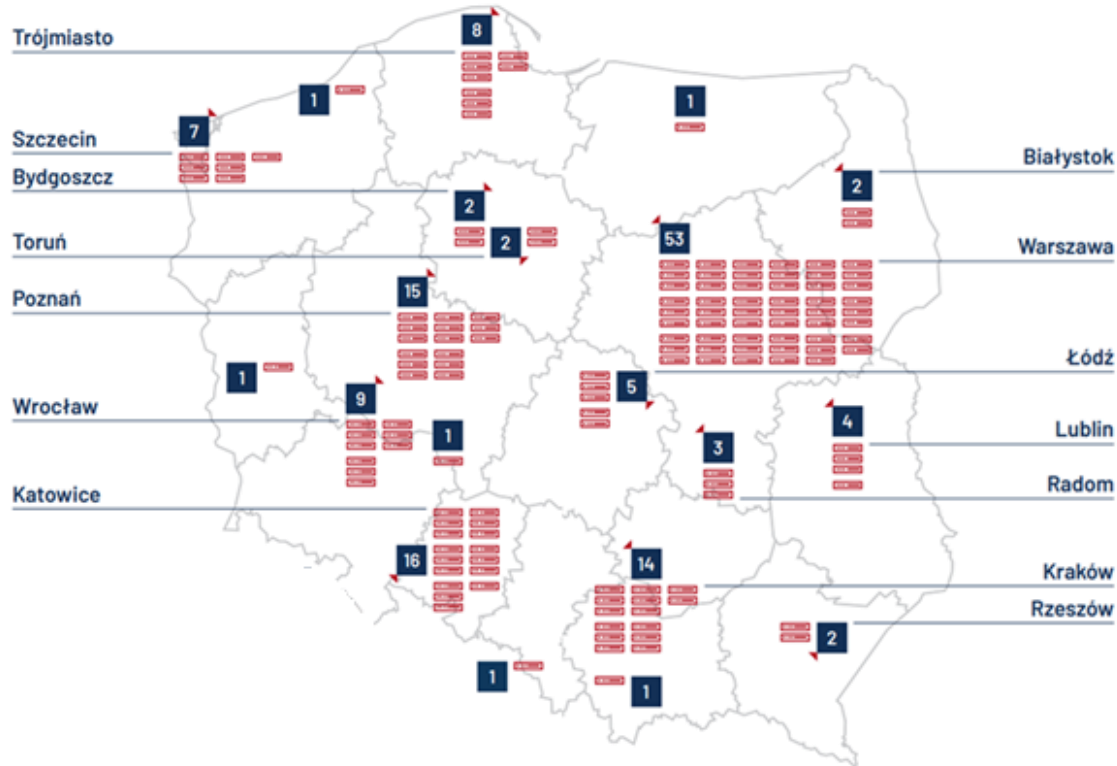
cumulative FDI

**20 +**

electronics & photonics faculties; ≈ 15 000 ICT  
grads every year

# Poland – Data Center Market

## Investment Snapshot & Growth Outlook



Source: Axi Immo 2024 Report

# 150

data center projects  
nationwide (2024)

# 320

## MW

operational capacity +  
400 MW contracted  
(Warsaw)

# 60%

of capacity is in  
hyperscale facilities

# 53

facilities in the Warsaw  
region – the largest  
hub in CEE

Poland offers investors a rare mix of **lower land and construction costs** than most of Europe and one of the continent's least saturated data-centre markets, leaving ample headroom to scale. With **explosive growth in cloud services** now turbo-charged by AI's insatiable appetite for compute, the country is racing toward gigawatt-level capacity - anchored in Warsaw yet rapidly spilling into regional hubs.

# Poland's stock market

## Dynamic development

Poland's stock market is on a roll. Equity turnover on the Warsaw Stock Exchange reached PLN 331 bln in 2024, and on 24 April 2025 the broad WIG index closed above 100 000 points for the first time. Total domestic market capitalisation is roughly PLN 732 bln, while foreign investors now generate almost 70 % of trading.

**PLN**  
**731.9**  
**bln**

Capitalisation of domestic companies (Main Market)

**PLN**  
**1.49**  
**trn**

Total capitalisation of all issuers (411 companies)

**792**  
**companies**

Total number of listed companies

**PLN**  
**331.4**  
**bln**

Equity trading turnover

**>100k**  
**points**

WIG all-share record high

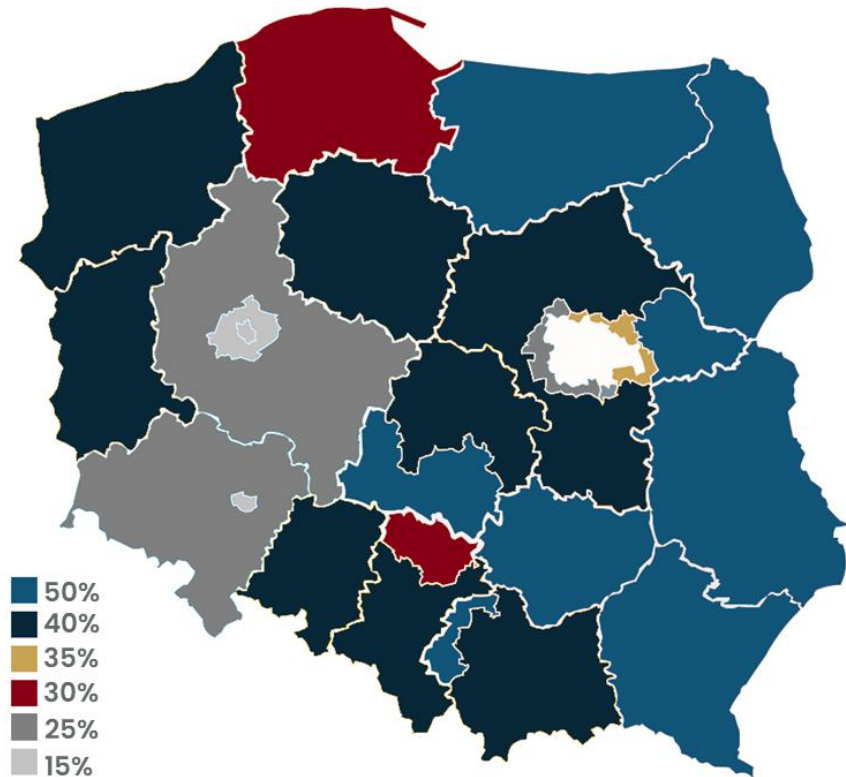
**1,969**  
**mln**

Brokerage accounts

# What do we offer?



# Public aid system in Poland



*Work in progress:*  
**New public aid programme  
coming up in 2025**



From **15%** up to **70%** public aid intensity depending on the selected region and company size



**Tax reliefs** and **preferential tax rates** available for R&D activities, IP rights and other services



Eligible for different types of activities including among others **setting-up of a new establishment** or **extending the capacity of an existing establishment**



Eligible for different types of investments: **manufacturing, BSS, R&D and innovative**



**Quantitative** and **qualitative criterias** and special conditions for large companies apply

# Poland – your place to invest



## Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019  
No recession from 1991 through 2019



## Biggest labour and product market in CEE

Over 40% of the region's total GDP and labour pool (2022)



## Transparent

Regional leader in the Transparency International Corruption Index



## Business-friendly

40th in the Doing Business ranking (1st in CEE)  
2nd lowest tax wedge for labour costs in the region – 35.6% (below OECD average)



## Stable, robust economy

Max score for Macroeconomic Stability in the Global Competitiveness Report



## FDI magnet

Regional leader in foreign inbound greenfield investment (2020)  
One of the 10 TOP host for FDI projects in 2022 in Europe



## Well-developed infrastructure

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



## Competitive cities

European Cities of the Future (fDi Intelligence):  
Warsaw: 6th position (ahead of Berlin, Stockholm and Barcelona)



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