

POLISH INFORMATION AND FOREIGN INVESTMENT AGENCY

PAIiZ: investment promotion agency

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Foreign Investment Department

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PAlilZ potential

Feature	Current status
Year of establishment	<ul style="list-style-type: none"> • 2003 as a merger of two state agencies
Legal status	<ul style="list-style-type: none"> • company wholly owned by State Treasury • company of the strategic importance
Organizational structure	<ul style="list-style-type: none"> • Agency's governing bodies: General Assembly, Supervisory Board, Management Board; • 7 departments: Foreign Investment Department, Regional Development Department, Economic Promotion Department, Economic Information Department, Department of Eastern Poland Promotion, Internal Service Department, Audit and Control Department
Human resources	~110 employees

Agency's offer

Scope of activities

Economic promotion

- promotion of Poland as an attractive business partner on the international markets
- organization of seminars, conferences, exhibition, study visits
- cooperation with foreign and domestic media
- publication of promotion materials

Information

- collecting, analyzing and processing economic data for internal and external use
- monitoring of investment abroad
- enhancing cooperation with international partners
- running Agency's portals

Inward & outward investment promotion

- information
- location study
- investment incentives
- after-care services

Regional cooperation

- database of *greenfield* & *brownfield* type of investment location offers
- cooperation with local partners: authorities, Special Economic Zones, industrial & technology parks
- coordination of the Regional Investors' Assistance Centers network
- promotion of Eastern Poland

Foreign Investment Department

Tasks:

- to encourage foreign firms to invest in Poland
- to provide them with a high quality service

Scope of activities:

- to determine the best way to set up in Poland (privatization, M&A, greenfield, brownfield)
- to prepare a set of information (macroeconomic, legal, sectoral data etc.)
- to conduct a location analysis
- to guide thru procedures

Project Managers are present at every stage of the investment process.



- Department cooperates with all the major institutions responsible for encouraging investment.
- FID also provides post-investment care services.

Servicing foreign investors

**Investment
marketing**

**Servicing
investors**

**Post
investment
care**

Inward investment promotion

Investment process

INVESTMENT MARKETING
Considering of investment
Direct marketing

SERVICING INVESTORS
Long list of countries

Short list

Investment decision
POST INVESTMENT CARE

Agency's offer

- marketing campaigns, investment seminars, work-shops, study tours
- co-operation with Polish Embassies abroad

- PM assistance
- site visits
- macroeconomic and sectoral data, information on financial incentives, SEZ and EU funds

- assistance in obtaining financial support from the state government
- co-operation with SEZ
- date base of suppliers and business partners and real estate data base

- after-care services
- ombudsman for foreign investors

Direct marketing



Type of activities:

- organization of investment missions
- participation in various seminars, conferences, fairs in Poland and abroad
- individual visits paid to identified potential investors
- organization of foreign delegations visits to Poland (business, journalists)

• Partners:

- central agencies
- local authorities
- special economic zones, clusters, technology parks
- specialized commercial partners (e.g. law firms, real estate agencies, HR agencies etc)



Targeted strategy

Priority countries and sectors for PAIIIZ

US:

aerospace, BSS, R&D

Japan:

automotive, electronics

China (+Taiwan):

automotive, electronics,
machinery

Germany:

automotive, machinery, ICT

France:

electronics, machinery,
biotechnology

United Kingdom:

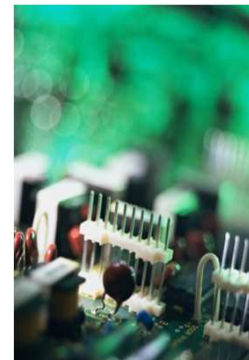
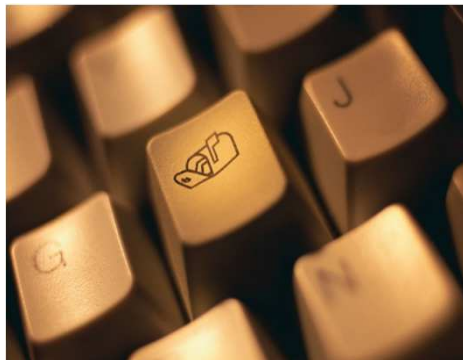
ICT, electronics, BSS, aerospace

South Korea:

ICT, electronics, R&D

India:

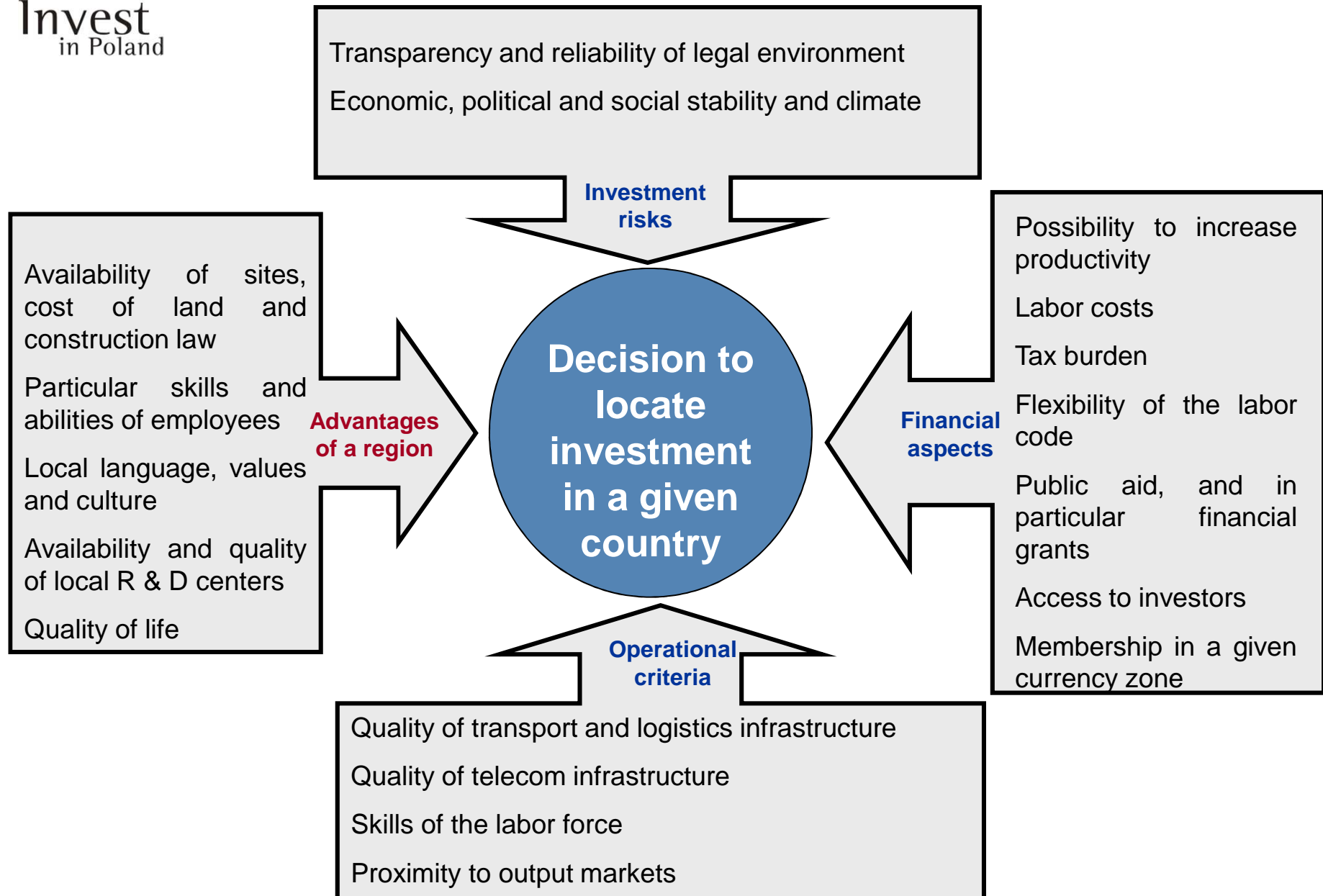
ICT, electronics, BSS, R&D



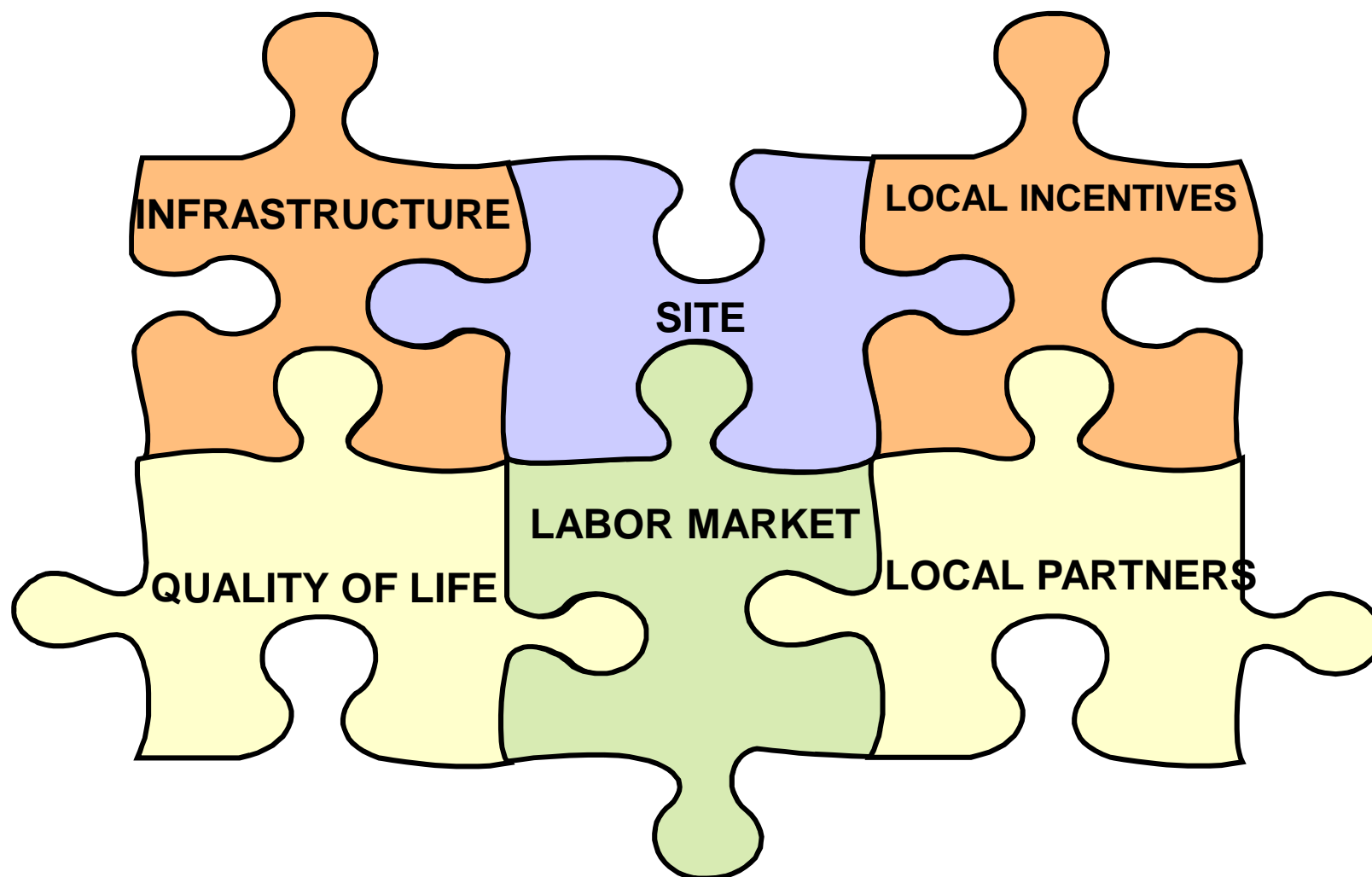
Servicing foreign investors



Investment location factors



Identification of investment location

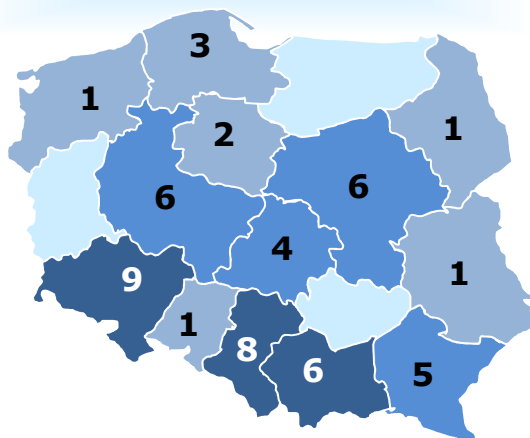




PAIIZ projects completed in 2013



49 COMPLETED PROJECTS



18 073 NEW WORK PLACES

The largest investors in terms of the number of created job places

somfy

IBM

Infosys

SAMSUNG
ELECTRONICS

itella

amazon.com



825 m EUR OF INVESTMENT

The largest investors in terms of invested capital

Ferrostaal

Valeo

Rhodia
Membre du groupe Solvay

BorgWarner

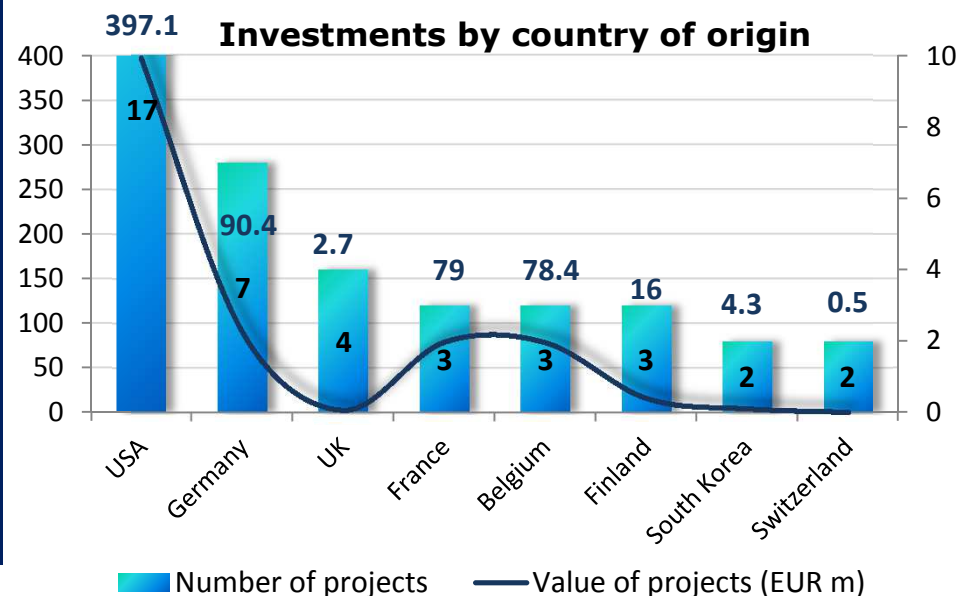
GM

GKN Driveline

nexteer
AUTOMOTIVE

POLARIS

Investments by country of origin



Active projects serviced by PALiZ

As of December 2013, PALiZ assisted 161 potential investments:

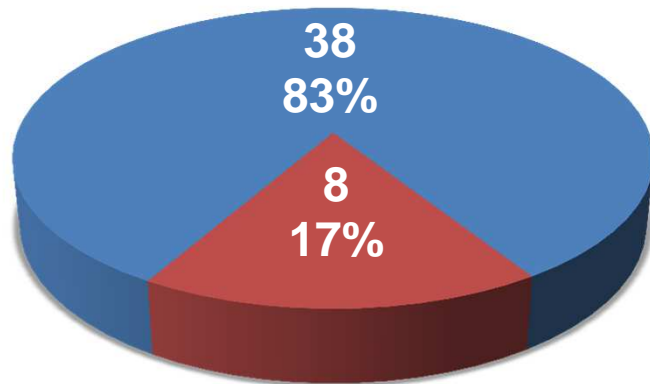
- Value of investment: **EUR 4 bn**
- Number of new work places: **30,700**
- Main sectors:
 - **BSS + ICT (36)**
 - **automotive (33)**
 - **R&D (15)**
 - **food-processing (11)**
- Major countries-investors:
 - **USA (43)**
 - **Germany (26)**
 - **China (11)**
 - **UK (10)**



BSS: high rate of success!
35% in assisted
50% in completed

Breakdown of projects completed by PALIZ

2005

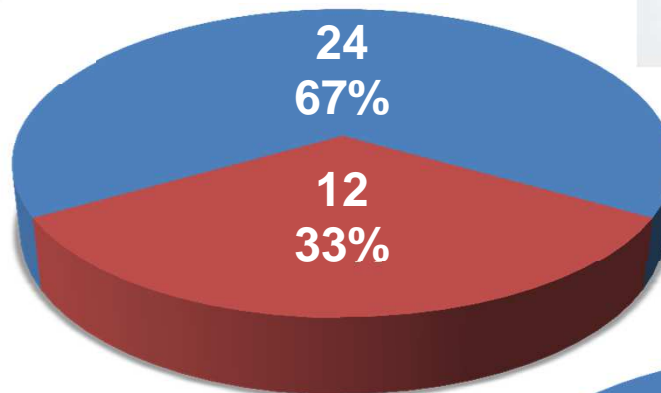


Job creation: 10%

2.434

■ Manufacturing
■ BSS

2009



Job creation: 57%

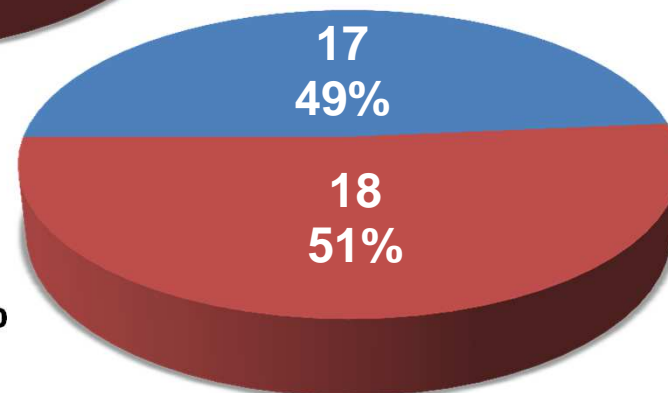
5.517

Job creation: 47%

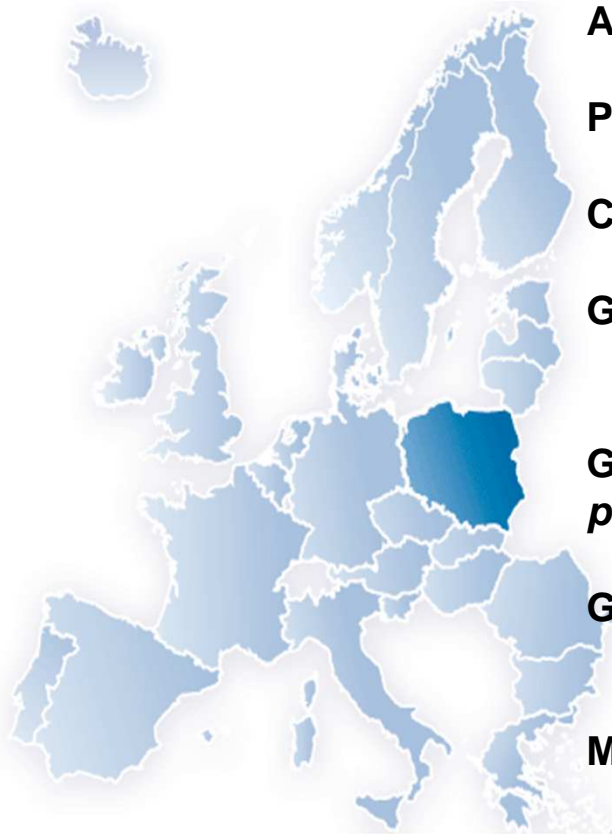
4.584



2013



Poland - Key facts



Area: 312 700 sq km – 6th in European Union

Population: 38,5 million – 6th in European Union

Currency: Polish Zloty (1 USD ~ 3.1 PLN, 1 EUR ~ 4.2 PLN)

GDP: USD 792 billion (PPP, 2012) – *IMF*
USD 813 billion (PPP, 2013) – *IMF estimates*

GDP per capita: USD 20 561 (PPP, 2012) – *IMF*
USD 21 118 (PPP, 2013) – *IMF estimates*

GDP growth: 1.6% (2009), 3.9% (2010), 4.5% (2011), 1.9% (2012),
1.2% (2013, *EC forecast*), 2.2% (2014, *EC forecast*)

Membership: EU, NATO, OECD, WTO, Schengen Zone



Value proposition

Attractive labor market

- young, well-educated workforce
- ca 11% of university students in the EU
- 453 universities & high education schools
- language proficiency
- increasing labour productivity

Location & economic fundamentals

- strategic location in continental Europe
- part of trans-European transportation corridor
- stable economic situation
- rapidly growing internal market

Appealing investment incentives

- tax exemptions in 14 Special Economic Zones
- local tax reliefs
- government grants
- EU grants for R&D

1000 km radius
250 m people



2000 km radius
550 m people

Effective incentives system

✓ *Tax breaks*

- CIT exemption in Special Economic Zone
- Real estate tax exemption

✓ *Cash support*

- Government grants
- EU cash grants for R&D



The EU budget: present and future Multiannual Financial Framework

2007 – 2013

Total: 975 bn EUR

Poland: 69 bn EUR (7%)



2014 – 2020

Total: 960 bn EUR

Poland: 72.9 bn EUR (7.6%)

Main advantages of Poland

- **Stable economic situation**
- **Market** growth
- Size of **internal market**
- Access to **regional markets**
- Cooperation with **suppliers and business**
- System of **investment incentives**



Poland ranked 4th most attractive investment location in Europe
in years 2013-2015

Competitive advantages



Strategic location and strong economic fundamentals



Availability of skilled human resources



Mature manufacturing and services hubs

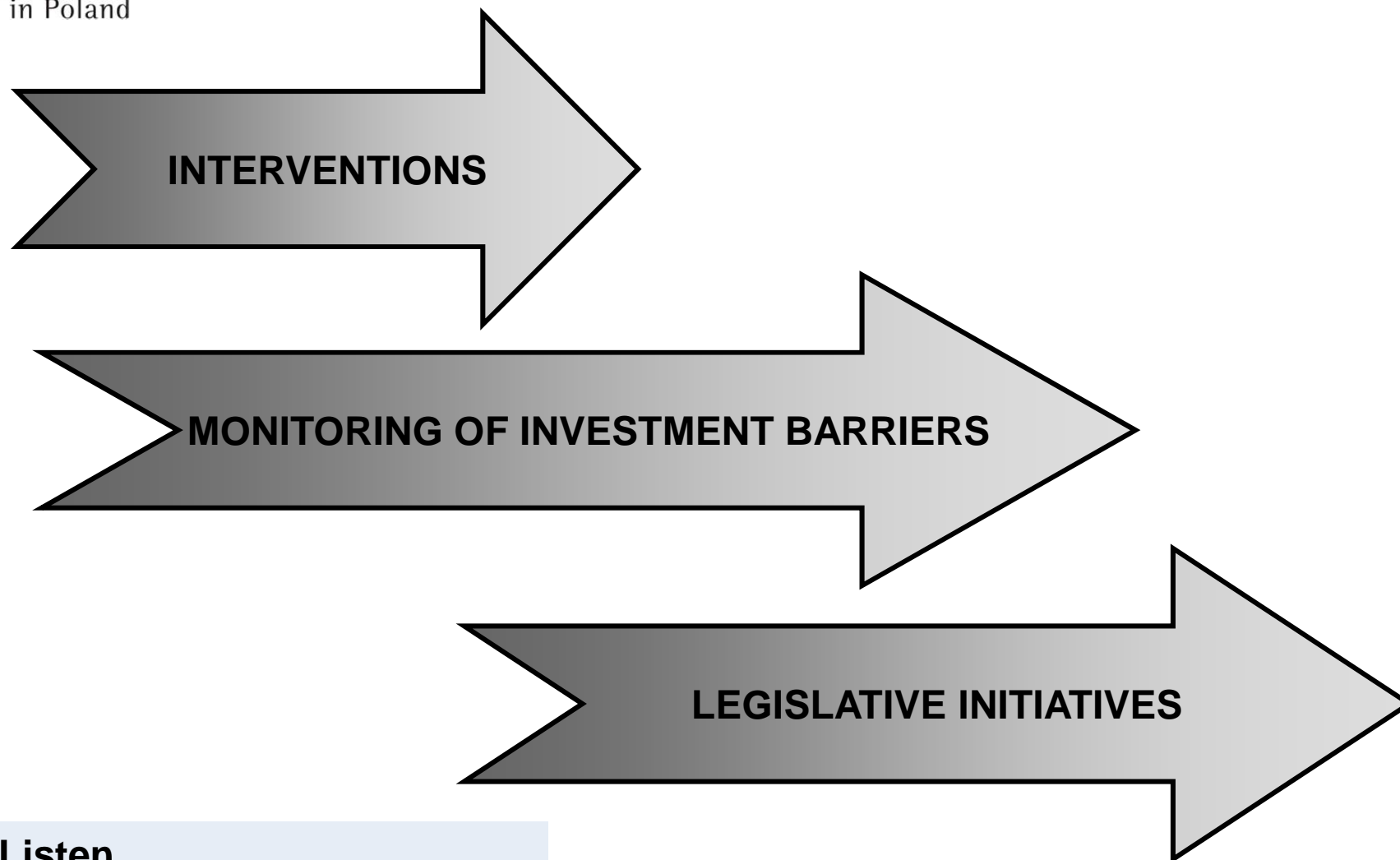


Effective incentives system



International recognition

Post investment care



Listen...

Хвала на пажњи!!!

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