

POLISH ICT SECTOR



INVESTIN



The Polish Agency for Enterprise Development (PARP) is a government agency established in 2000 to support micro, small and medium-sized enterprises. Over more than 15 years of its existence the Agency has developed numerous forms of support, including: financing for enterprises, development services, education and information activities as well as actions aimed at enhancing entrepreneurship culture and innovation in Poland. The areas of PARP activity evolve along with economic development and with emerging new trends in business and innovation. Thus, over the years, PARP has become a forerunner in creating new support areas and developing various ways of assistance (financing, education, promotion). The new instruments under the EU Financial Perspective 2014-2020 serve to stimulate entrepreneurship, innovation and competitiveness of Polish businesses. PARP is engaged in the implementation of three new operational programmes co-funded from the EU funds, namely: Smart Growth, Eastern Poland, Knowledge Education Development.

If you are interested in information on support programmes offered by PARP, addressed to entrepreneurs and business environment institutions, you can contact the helpline operated by the PARP Information Centre:

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Polish ICT Promotion Program

In the years 2016-2019 the Polish Agency for Enterprise Development is responsible for implementation of the Polish ICT Promotion Program.

The aim of the program is to present Polish ICT products and services to a wide audience of investors, distributors, business and technology partners, and potential end-users.

We will organise 14 promotion stands at ICT trade fairs and conferences in Brasil, Japan, South Korea, USA, Spain, Germany, Austria and Portugal, including events dedicated to startups.

The program is financed from the European Funds in the framework of the Smart Growth Operational Programme, submeasure 3.3.2.

Learn more about the Polish ICT Promotion Program:

<https://ict.trade.gov.pl/en>

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European Union
European Regional
Development Fund



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Polish ICT sector offers unique possibilities for domestic companies and foreign investors. Polish economic situation and profile of ICT sector provides suitable conditions for business development. Poland catches up with the European leaders.

INTERNATIONAL POSITION AND PROSPECTS FOR 2015-2025

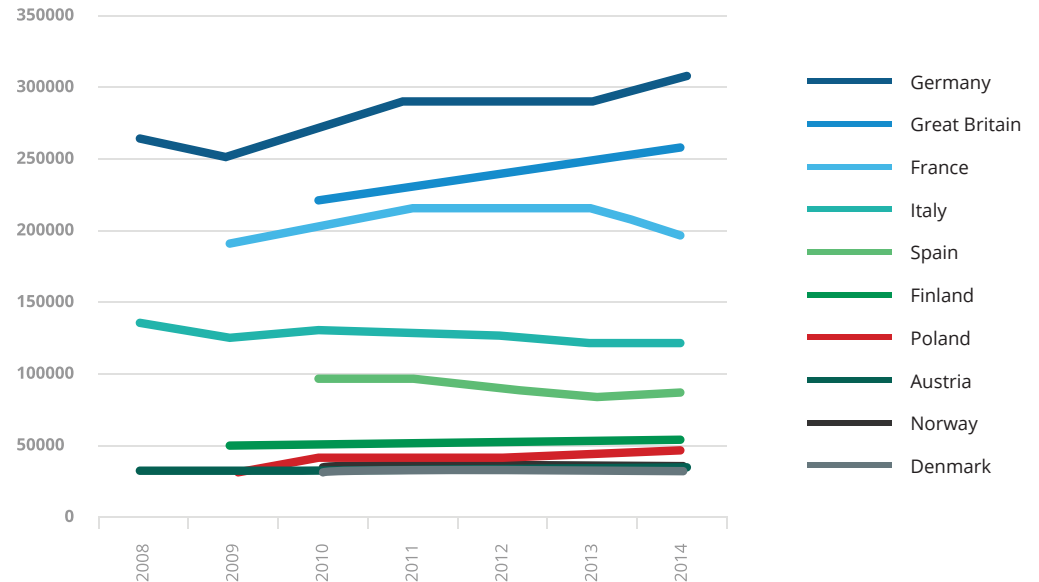
Polish ICT sector appears to be an attractive outlook for foreign investors. This industry has a great potential for development when compared with other sectors of the Polish economy and it gives promising indications when it comes to international perspective. So far, good condition of the Polish economy, large domestic demand, independent currency and sufficient human resources allow relatively safe conditions for domestic as well as foreign investment in the ICT sector. However, such secure environment is but

a fraction of all the opportunities which the leaders of the market can be provided with. For instance, access to the qualified staff and support from the EU institutions and the government induce the creation of an effective network of shared service centers and R&D hubs. Therefore, products designed and fabricated in Poland are absolutely outstanding on the regional and global scale, as evidenced by international achievements of Polish companies. Thanks to innovative approach they managed to successfully enter their market niches, e.g. in the segment of video games, business apps, and telemedicine. This situation is a tangible proof of a considerable advantage that startups and new investors

can seek for in the ICT sector. Polish ICT sector has found itself among the fastest growing ones in Europe in recent years, reporting 8.64% average annual growth in 2009-2014. It has increased in the last five years by 16.72%. Poland is successfully striving to keep up with the biggest European economies while preserving its advantage resulting from low labor costs and benefits from the EU funding. Such a unique environment enables companies and investors to benefit from the large and developed market as well as still present above-average growth potential. High dynamic of the ICT sector is reflected in its value of production, which increased by 20.57% in 2010-2016. At the same time,

ICT SECTOR SALES OF THE EUROPEAN MARKET LEADERS

in mln EUR



Segments with the highest forecasted growth rate, that Poland can specialize in, are production of hybrid cars and intelligent transportation, gaming industry, Internet of Things, telemedicine and medical equipment.

the share of the ICT sector in Polish GDP is still relatively low, which demonstrates great potential for development. In Poland, it is responsible for 6.06% of GDP, while in some leading countries such as Germany, Czech Republic and France it constitutes 8.15%, 8.43% and 7.33% of GDP respectively. This would mean that the projected growth of Polish ICT sector may reach about 12 billion USD provided that Poland succeeds in equalling the leaders. Furthermore, the Polish ICT industry notes growing international importance thanks to intensified export. In the past years, the value of export grew steadily, reaching 51.8 billion PLN in 2014. The main segments in this area are telecommunications equipment and consumer electronics. Prospects of the sector are optimistic. It is reasonable to forecast a stable or even dynamic development of most areas of the ICT sector.

Looking to the future, the segments which may become crucial for Polish enterprises should also be identified. Independent experts, basing on reliable market data, suggest that Poland has a good chance to achieve international prominence in such segments as:

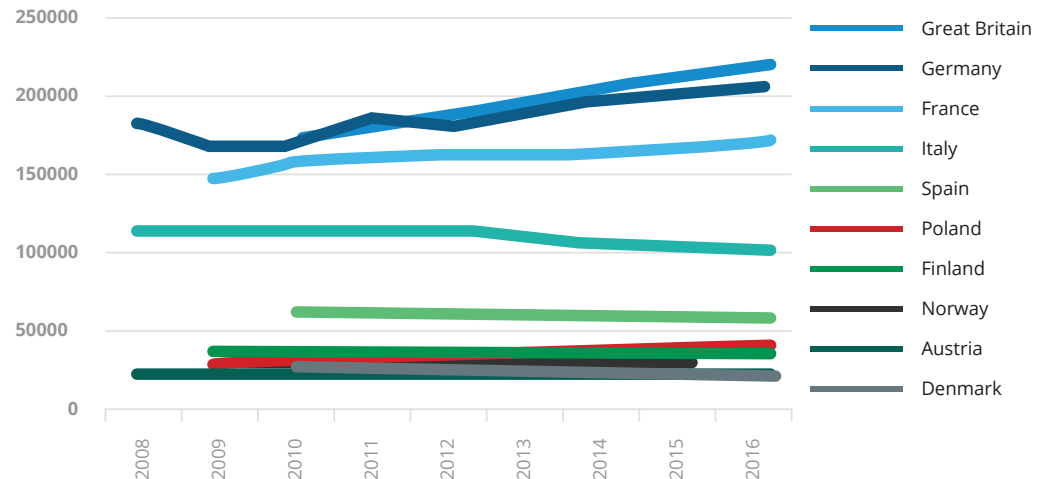
- Production of hybrid cars and intelligent transport;
- Games industry;
- Internet of Things;
- Telemedicine and medical equipment.

These industries can repeat the success of Polish segment of BPO centers and SSC. In most of the above, Poland already boasts certain success on the global scale and Polish products can successfully compete with global leaders. The primary driving force for development of the sector should be steady investment in innovation and

intensified spending on R&D. Polish ICT industry reveals its unique position on the map of Europe and the entire world. This is the promise of significant growth, but also of the possible challenges faced by investors and entrepreneurs. The aspiring entities may use these conditions for their own advantage to gain the competitive position within the framework of the Polish market with the prospect for international expansion.

ICT PRODUCTION VALUE OF THE EUROPEAN MARKET LEADERS

in mln EUR



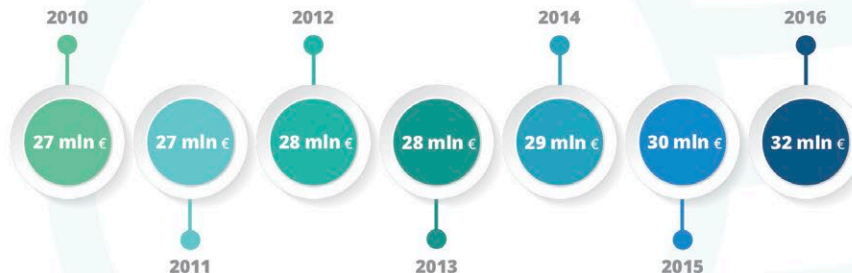
TURNOVER OF ICT SECTORS - POLAND -

DATA IN MLN EURO



PRODUCTION VALUE OF ICT SECTORS - POLAND -

DATA IN MLN EURO



ICT SECTOR SHARE OF EMPLOYMENT - POLAND -



FORECAST OF POLISH ICT SECTOR PRODUCTION

DATA IN MLN EURO



ICT SECTOR SHARE IN POLISH INTERNATIONAL TRADE

- 2015 -



NUMBER OF PERSONS EMPLOYED IN ICT SECTOR

- 2014

POLAND
315 094

GERMANY
1 111 034

ITALY
564 933

SPAIN
396 706

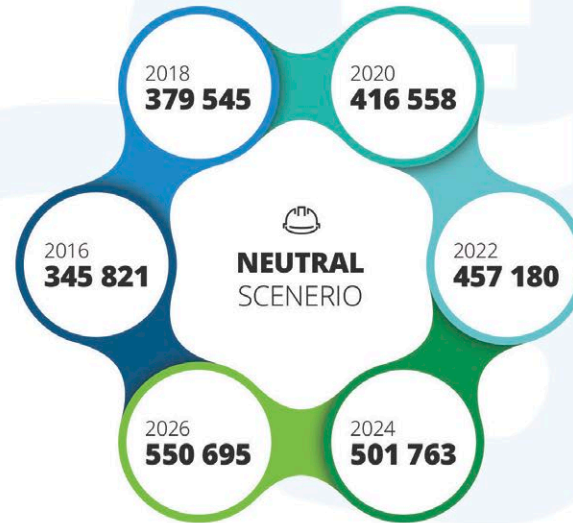
ROMANIA
168 036

NORWAY
79 723

DATA IN FULL-TIME EQUIVALENTS

FORECAST OF POLISH ICT SECTOR EMPLOYMENT

DATA IN FULL-TIME EQUIVALENTS



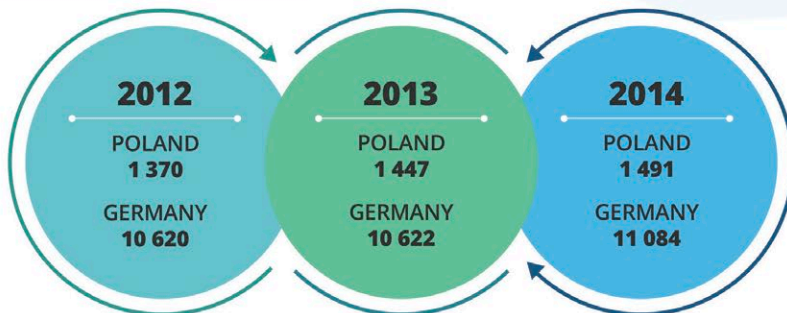
AVERAGE SALARY IN ICT SECTOR

- 2014 -



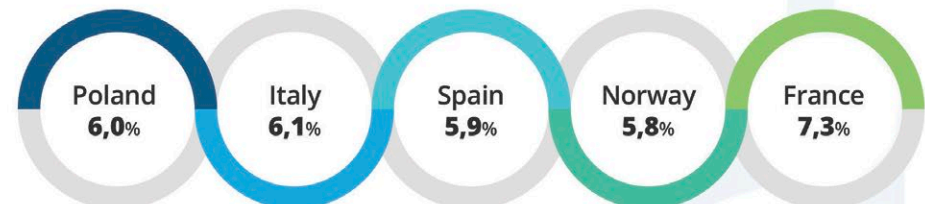
INVESTMENT VALUE IN ICT SECTOR

DATA IN MLN EURO.



ICT SECTOR SHARE OF GDP

- 2017 -



notes



MINISTRY
OF ECONOMIC
DEVELOPMENT

INVESTIN



European
Funds
Smart Growth

European Union
European Regional
Development Fund

