

Invest in Poland

Polish Infrastructure Development
Plans and Strategies

Seminar for investors

8th March 2022

Written by



Objectives of the seminar

The main objectives of the seminar are:

- ▶ describing the competitive advantages of the Polish economy
- ▶ presentation of Polish investment plans in the infrastructure sector



Maciej Ziomek
Associate Partner
EY Poland Transport &
Infrastructure Leader



Andrzej Sajkiewicz
Japan Business Services



Yasushi Matsumoto
Japan Business Services



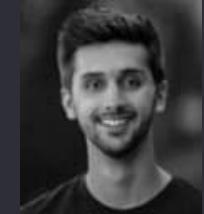
Jakub Adamski
Manager



Jakub Koszyczarek
Manager



Wiktor Mrozowski
Senior Consultant



Zachary Szymoński
Consultant

Contents/agenda slide

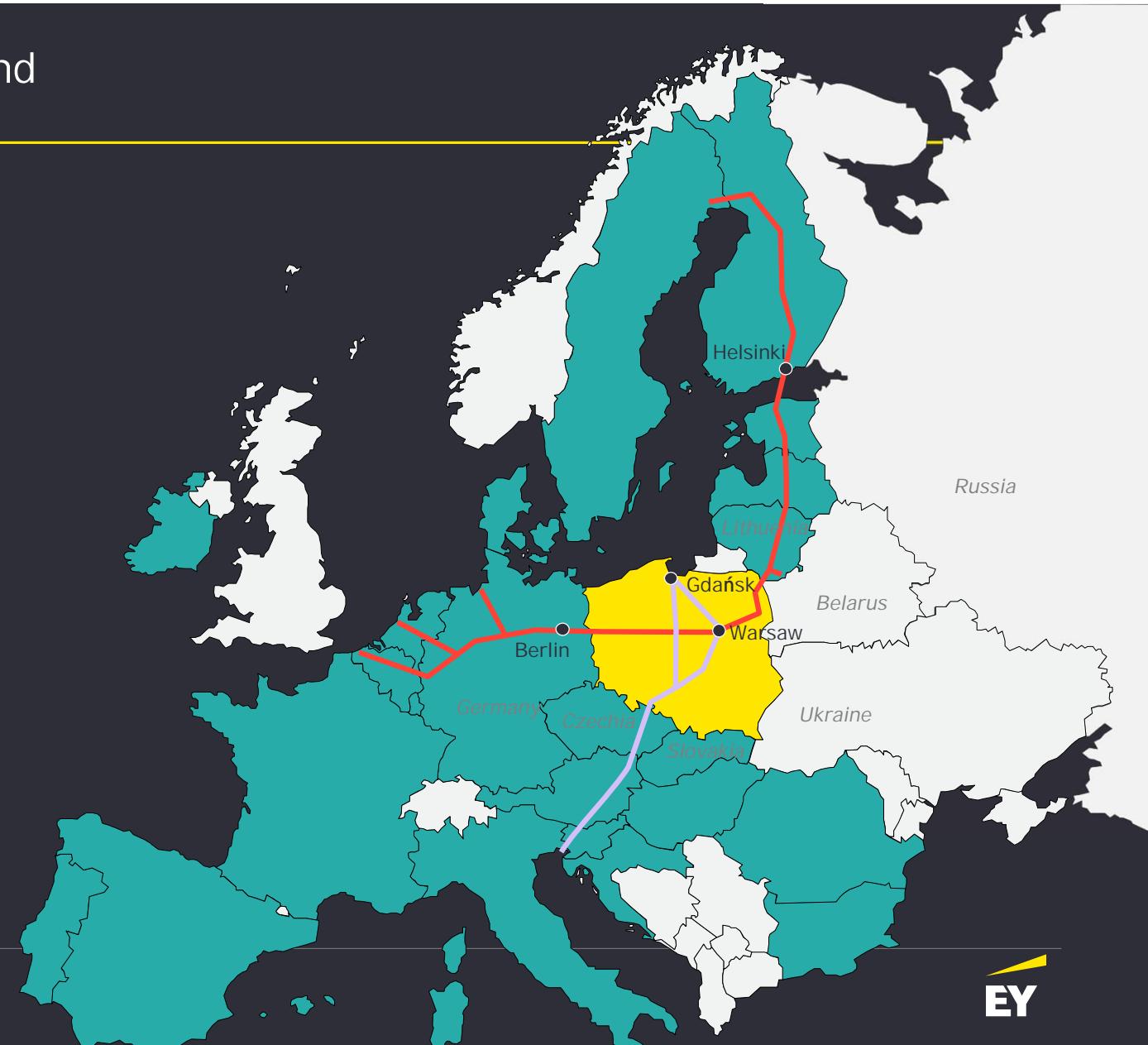
1.	Why Poland? - general information	なぜ今、ポーランドなのか	15 min.
	Q&A	質疑応答	5 min.
2.	Review of infrastructure programs	根幹となるインフラ投資戦略, 開発計画の概況	20 min.
	Q&A	質疑応答	5 min.
3.	Three Seas Initiative	三海域イニシアチブによる国境を 超えたインフラプロジェクト	10 min.
	Q&A	質疑応答	5 min.
4.	Selected Infrastructure projects	日系企業の参画が期待される 個別プロジェクト	20 min.
	Q&A	質疑応答	5 min.
5.	Summary	まとめ	10 min.



Why Poland?

General Information about Poland

- ▶ Poland as a transport hub for Eastern Europe:
 - ▶ Transport routes of the TEN-T:
 - ▶ North Sea-Baltic Sea Corridor
 - ▶ Baltic-Adriatic Corridor
 - ▶ Railway connections – Russian gauge,
 - ▶ Main seaports: Gdańsk, Gdynia,
 - ▶ Air connections with EU and OECD countries
- ▶ ポーランドは東ヨーロッパにおける交通の要衝（ハブ）となっています:
 - ▶ 欧州横断輸送ネットワーク（TEN-T）における重要な位置:
 - ▶ 北海 - バルト海を結ぶ経路
 - ▶ バルト海 - アドリア海を結ぶ経路
 - ▶ 鉄道交通 - ロシア方面からの玄関口
 - ▶ 主要湾港: グダンスク, グディニヤ,
 - ▶ 航空交通 : EU , OECD各国との良好なアクセス



General Information about Poland



Frederic Chopin
ショパン



Robert Lewandowski
ロベルト・レヴァンド
フスキ



Marie Curie-Skłodowska
キュリー夫人



John Paul II
ヨハネ・パウロ2世



Olga Tokarczuk
オルガ・トカルチュク



Lech Wałęsa
レフ・ワレサ



Adam Małysz
アダム・マリッシュ



Krzysztof Penderecki
クシシュトフ・ペン
デレツキ

Value of investment plans in Poland | Key figures

€76b



Total value of investment expenditures from EU funds for Poland in the 2021-2027 programming period

2021-2027の計画期間にEUファンドからポーランドに支払われる投資総額

€25b



Total value of investment expenditures for infrastructural projects in European funds for Infrastructure, Climate and Environment programme

インフラ、気候・環境関連の投資計画に対して、EUファンドから支払われる投資総額

€36b



Total value of investment expenditures in National Recovery Plan for 2021-2026

2021-2026にかけて、国家復興計画に基づいて行われる投資総額

€7.7b



Total value of CAPEX on Solidarity Transport Hub and complementary investments

交通ハブ化プロジェクトおよび、その周辺プロジェクトに対する資本投資額

€290b



Total value of investment needs estimated for infrastructural projects in Three Sea Initiative

三海域イニシアチブによるインフラ投資に必要と見込まれている投資額

Economy

38 million inhabitants
人口：約3800万人

Ageing population
人口の高齢化

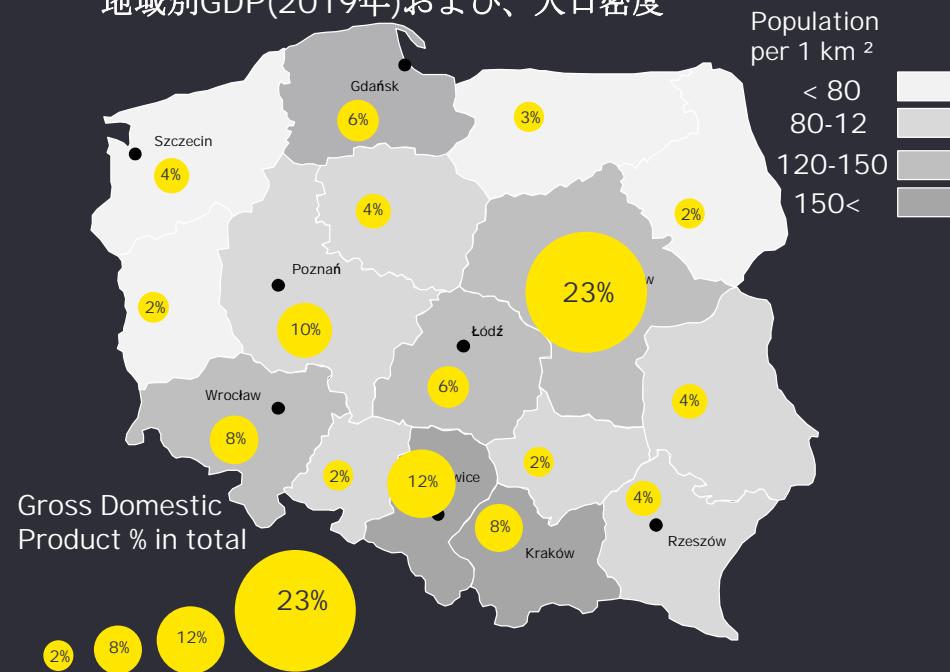
123 inhabitants per km²
人口密度：123人/km²

Migrations to suburban areas
郊外への移住

Shift to immigration country
移民受入国へのシフト

Gross Domestic Product by regions (current prices) in 2019 and population density in 2020

地域別GDP(2019年)および、人口密度



Currency: PLN
通貨：ポーランド・ズロチ

Total GDP (USD): 655.3b
GDP : \$ 655.3b

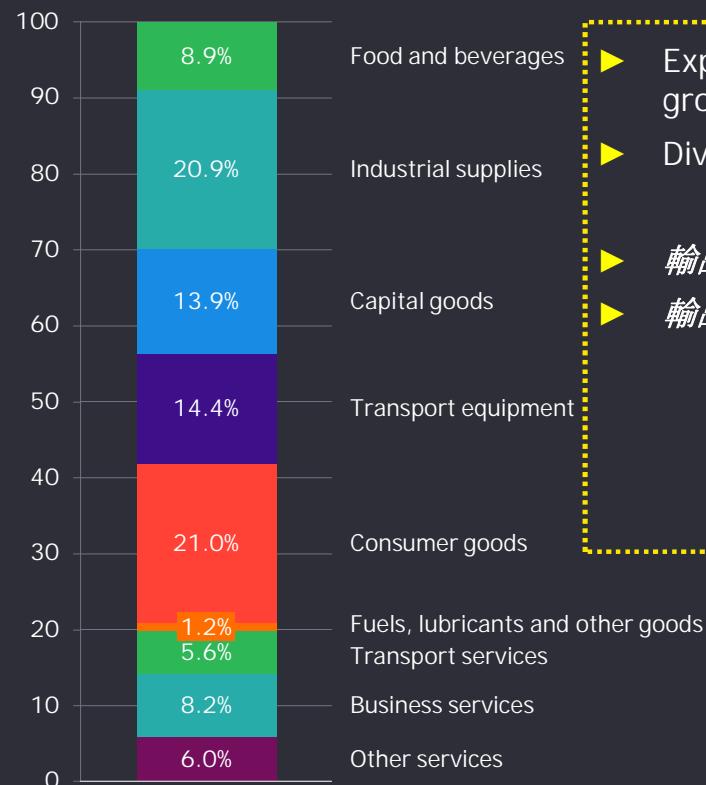
GDP per capita PPP: 37 323 USD
1人あたりGDP : \$37,323

Exports to GDP: 56.2%
GDP に占める輸出比率 : 56.2%

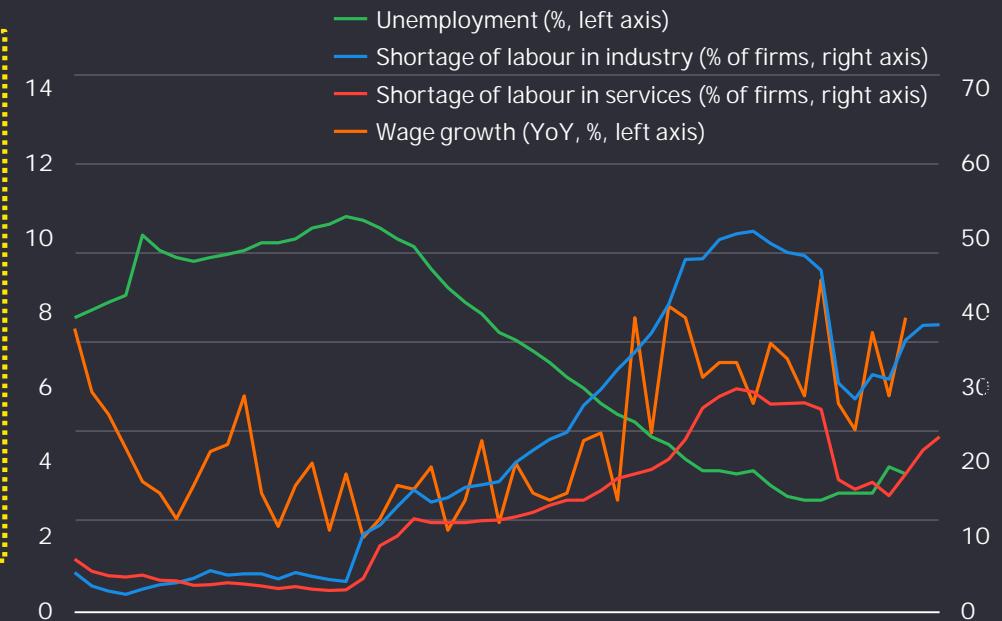
2.5% inflation target
インフレ・ターゲット : 2.5%

Economy

Product structure of Polish exports in 2020



Labour market conditions in Poland (2009 – 2021)



- ▶ Export-driven economic growth
- ▶ Diversification of exports

▶ 輸出が経済成長の牽引役
▶ 輸出種目の多様化

- ▶ Cheap labour relative to education and productivity
- ▶ Immigration inflows fill gaps in labour market

▶ 生産性、教育水準に比較して、安価な労働コスト

▶ 人口の流入が、労働市場のギャップを埋めています

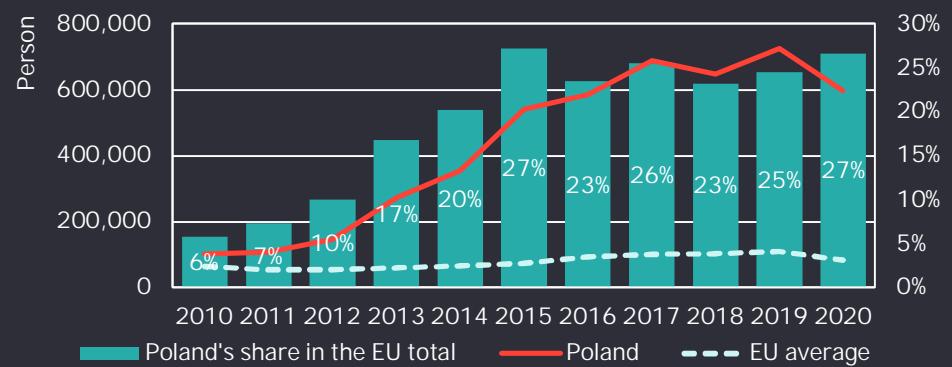
Demography

- ▶ Poland is currently undergoing a shift from emigration to immigration country
- ▶ One of the main competitive advantages of Poland is the high share of population with higher education
- ▶ ポーランドは現在、移民の排出国側から受入国側にシフトしています
ポーランドの主な競争優位の1つは、高等教育を受けた人口の割合が高いことです。

Population forecast in Poland by 2050 (人口推移の予想)



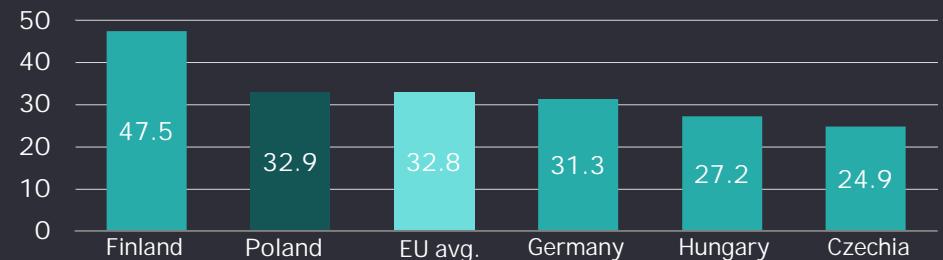
First residence permits in Poland in EU for family, education and remunerated activities reasons 2010-2020 (居住許可取得者の推移)



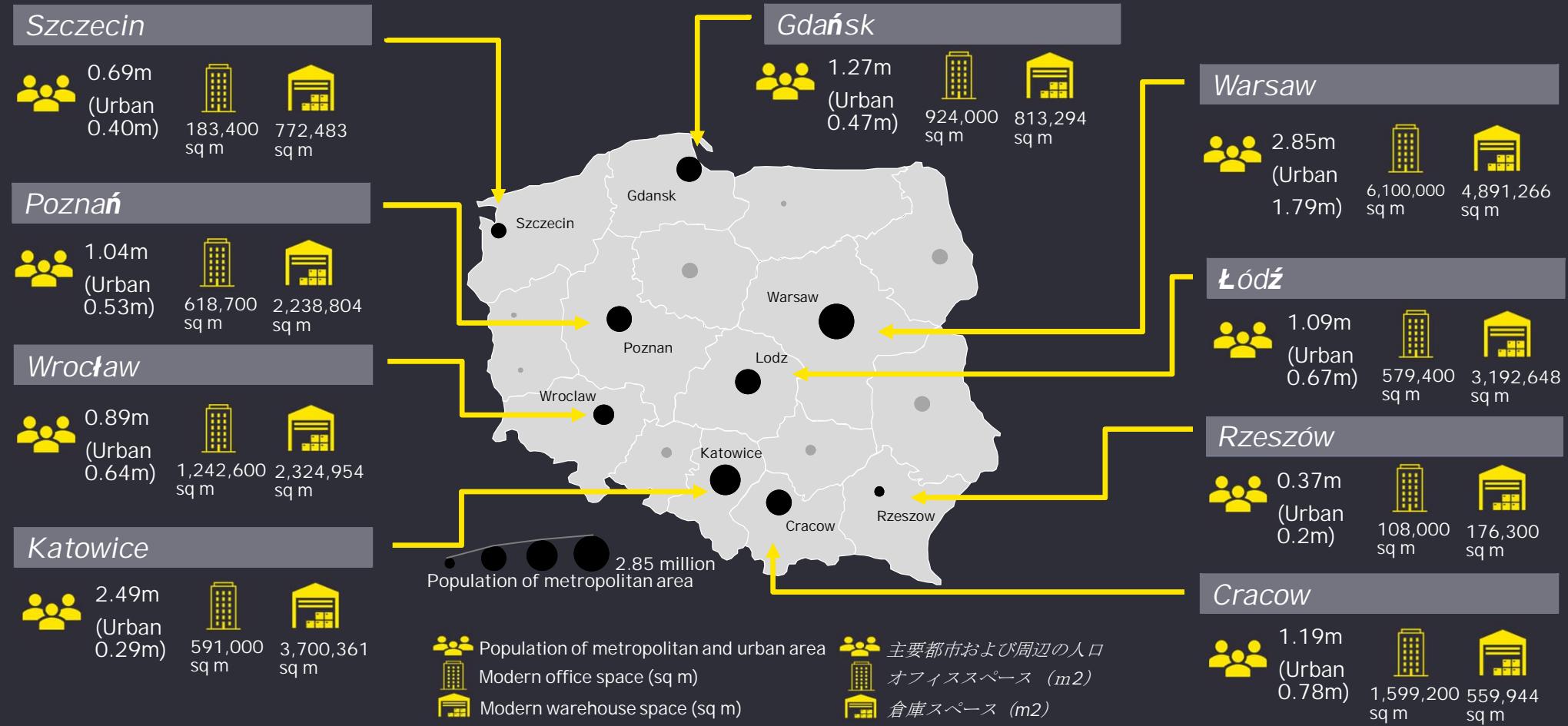
Source: Eurostat

Note: data refer to residence permits and not to permanent migration.

Population with tertiary education, 2020 (%)
(高等教育を受けている人口の割合)



Key metropolitan areas



Polish Investment Zone

	Maximum support level (large enterprises) 最大の補助水準	Up to 50% of the value of CAPEX or two-year employment costs (depending on location)	最大で投資額の 50 % または2年間分の雇用コスト (条件はロケーションによって異なります)
	Location ロケーション	Any location in Poland	ポーランド国内の全てのエリアが対象となります
	Tax exemption 税額控除	10 to 15 years of CIT exemption (depending on location)	10年から15年にわたる法人所得税の免除（控除） (条件はロケーションによって異なります)
	Evaluation criteria 評価基準	Quantitative and qualitative criteria (e.g. R&D activities, creating well-paid jobs)	定量的基準、定性的基準（例：研究開発活動、高所得の雇用創出）
	Application procedure 申請手続き	SEZ authority evaluates applications for CIT exemption prior the investment	SEZ（経済特区）当局は投資前の段階で法人税免除の申請を評価します。

Poland's key competitive advantages



Q&A

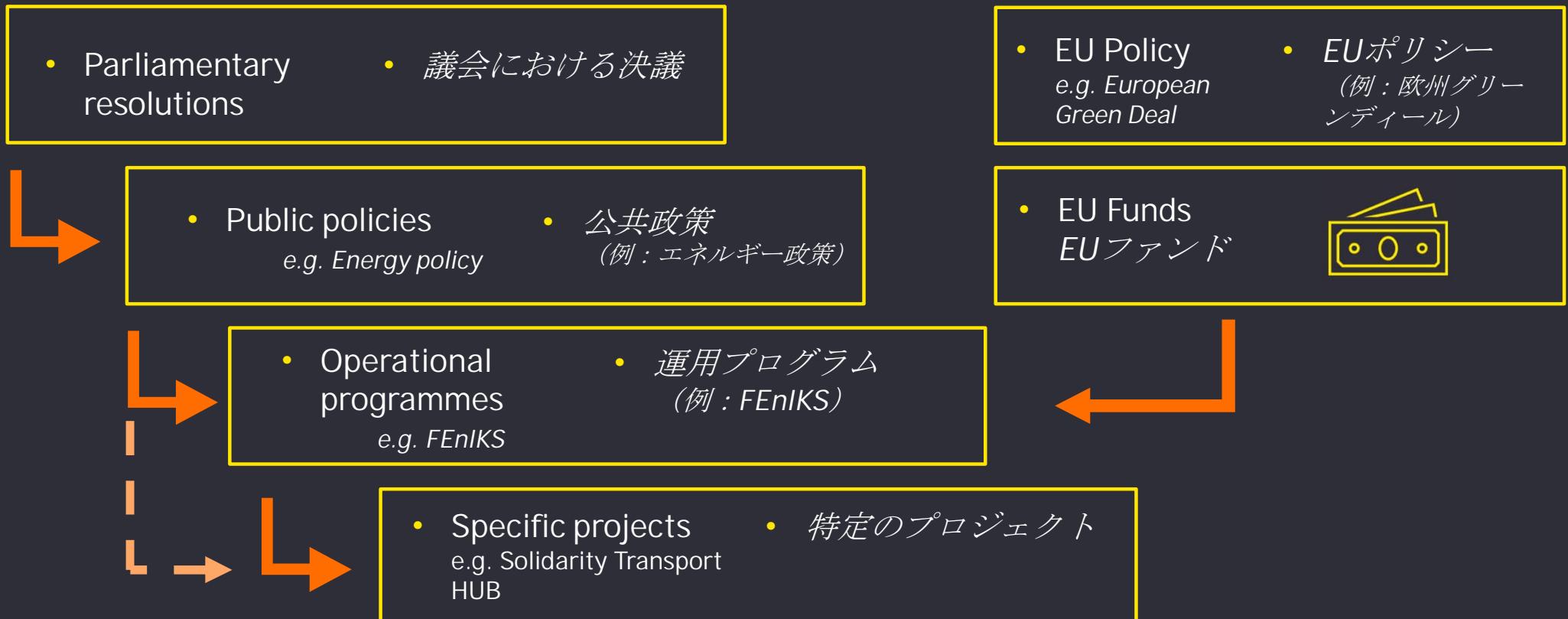




Review of infrastructure programs



EU funds & Polish strategic planning



Review of infrastructure programs

- National Roads Construction Programmes
- Solidarity Transport Hub Program



- 国道建設プログラム
- 交通ハブ化プログラム

- 国家復興計画
- インフラ、気候、環境を対象とした
EUファンド- FEnIKS



- National Recovery Plan
- European Funds for Infrastructure, Climate, Environment - FEnIKS

- Energy policy of Poland until 2040
- Polish Hydrogen Strategy until 2030
- Polish nuclear Power Programme



- 2040年に向けたポーランドのエネルギー政策
- 2030年に向けたポーランドの水素戦略
- ポーランドの原子力プログラム

Review of infrastructure programs | European Funds for Infrastructure, Climate, Environment (FEnIKS)

Objectives

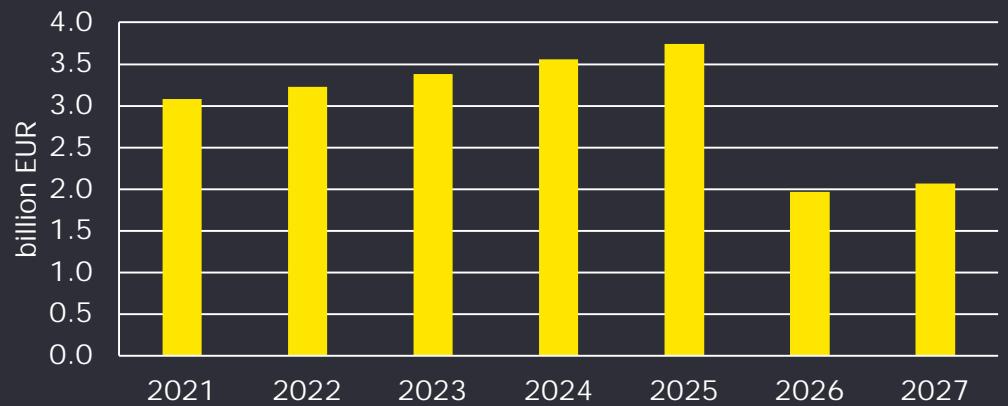
- Transformation into a modern, resource-efficient and competitive economy
- 交通網を近代化、効率化し、競争力のある経済を構築する

Total allocation
€ 25,1b

Planned distribution of FEnIKS investment expenditure over the period 2021-2027
2021年から2027年にかけたFEnIKSによる投資支出の計画

Stakeholders

- Public institutions, including local governments and government agencies
- Opportunities for private companies acting as general contractors
- 国家機関および地方政府を含む、公的機関
- 民間のゼネコンにとっての投資機会



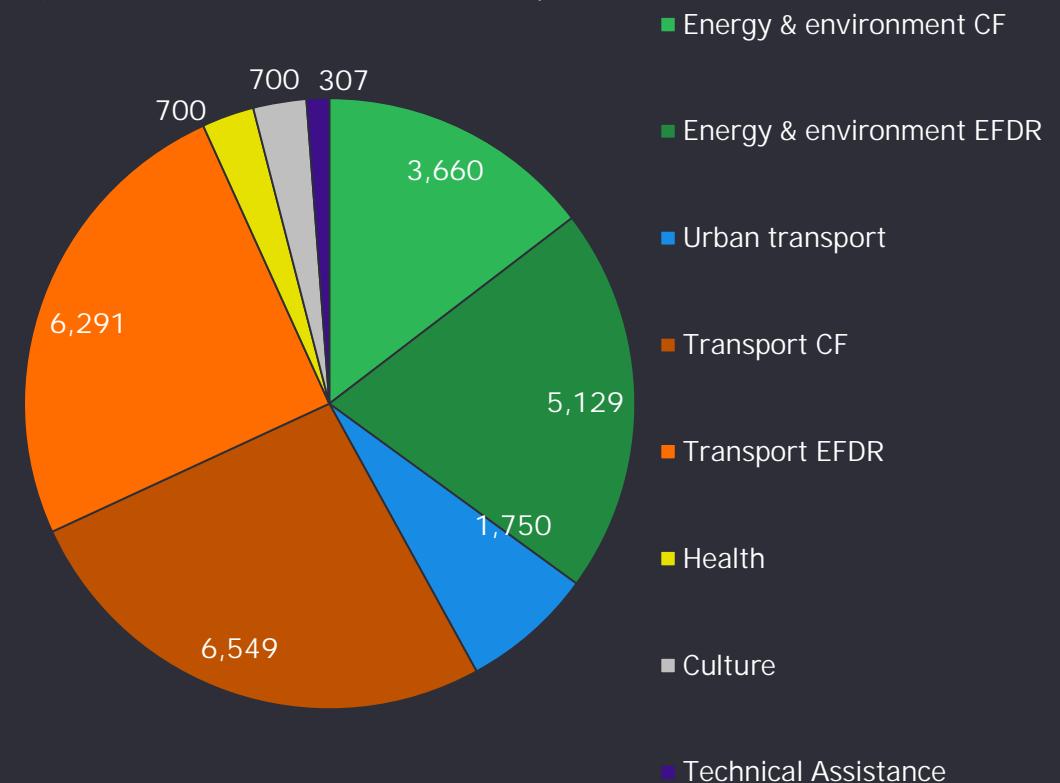
Review of infrastructure programs | European Funds for Infrastructure, Climate, Environment (FEnIKS)

Investment areas

投資分野



Allocations of FEnIKS by priorities (mEUR)
優先エリアごとのFEnIKSの配分



Review of infrastructure programs | National Roads Construction Programme

Objectives

- ▶ High-quality national road network
- ▶ Improvement of communication accessibility
- ▶ Road traffic safety
- ▶ 高品質な国道ネットワーク
- ▶ 交通アクセスの向上
- ▶ 交通の安全性向上

Total allocation

€ 65 b

Stakeholders

- ▶ General Directorate for National Roads and Motorways
- ▶ Private general contractors
- ▶ 国道および高速道路局
- ▶ 民間のゼネコン

Review of infrastructure programs | National Recovery Plan

Objectives

- ▶ Innovation leading to increased productivity
- ▶ Green economy
- ▶ Smart mobility
- ▶ Social capital and quality of life
- ▶ 生産性の向上をもたらすイノベーション
- ▶ グリーン経済
- ▶ スマートモビリティ
- ▶ 社会資本と生活の質の向上

Total allocation

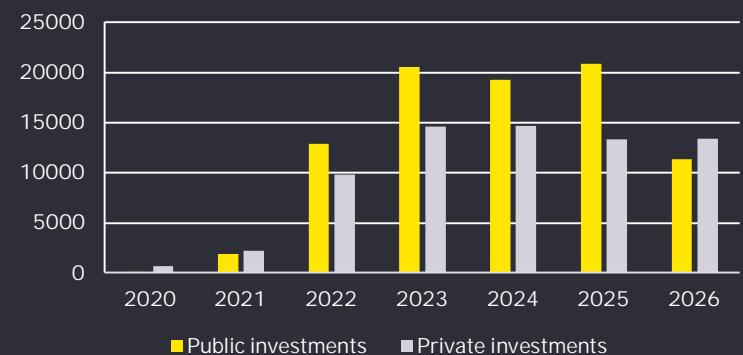
€ 35.97B

Planned distribution of NRP investment expenditure over the period 2020-2026

2020年から2026年にかけての国家復興計画による投資支出の配分

Stakeholders

- ▶ Public Sector (central & local governments)
- ▶ Opportunities for private investors in selected initiatives
- ▶ 公的部門（中央および地方政府）
- ▶ イニシアチブが与えられた分野における民間投資の機会

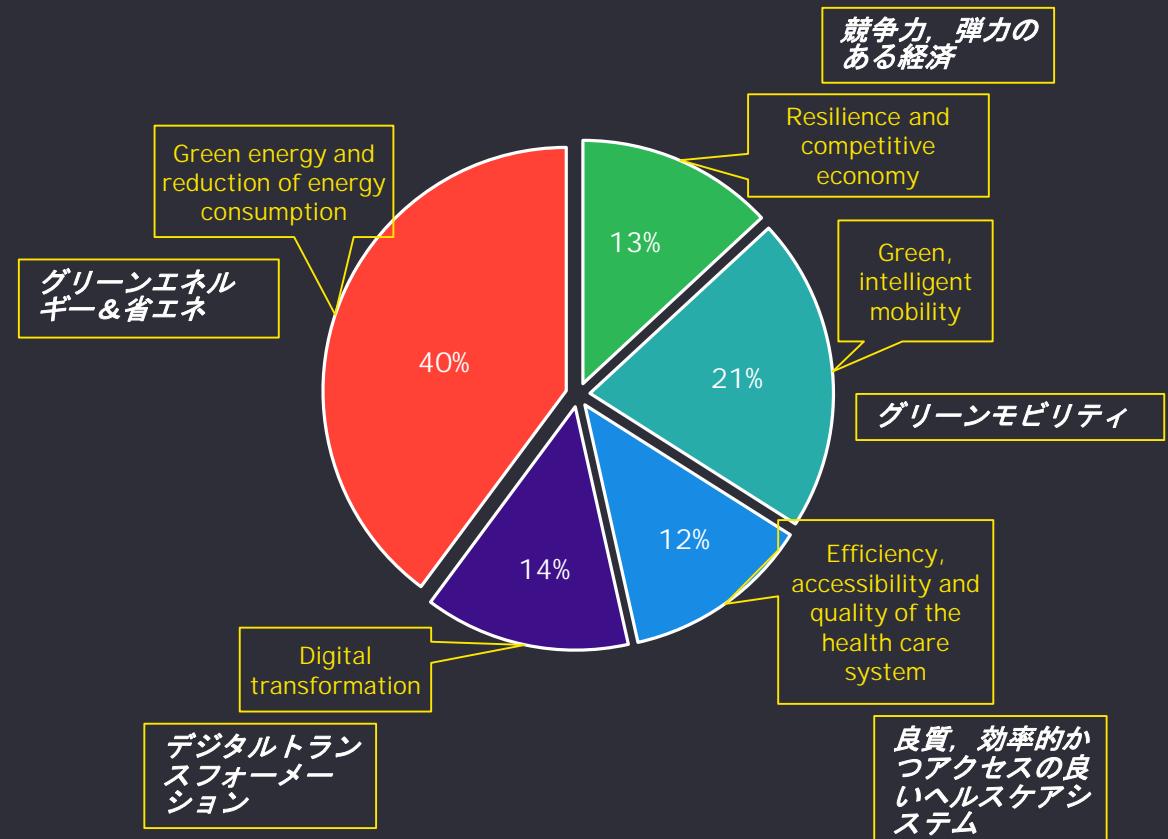


Review of infrastructure programs | National Recovery Plan

Investment areas



Allocations



Q&A



The background image shows a vast solar panel farm with rows of blue panels stretching into the distance. In the far background, several wind turbines are visible against a hazy sky. A large, semi-transparent white question mark graphic is positioned on the left side of the slide, pointing towards the text.

Infrastructure projects beyond the borders of Poland under the Three Seas Initiative

Three Seas Initiative

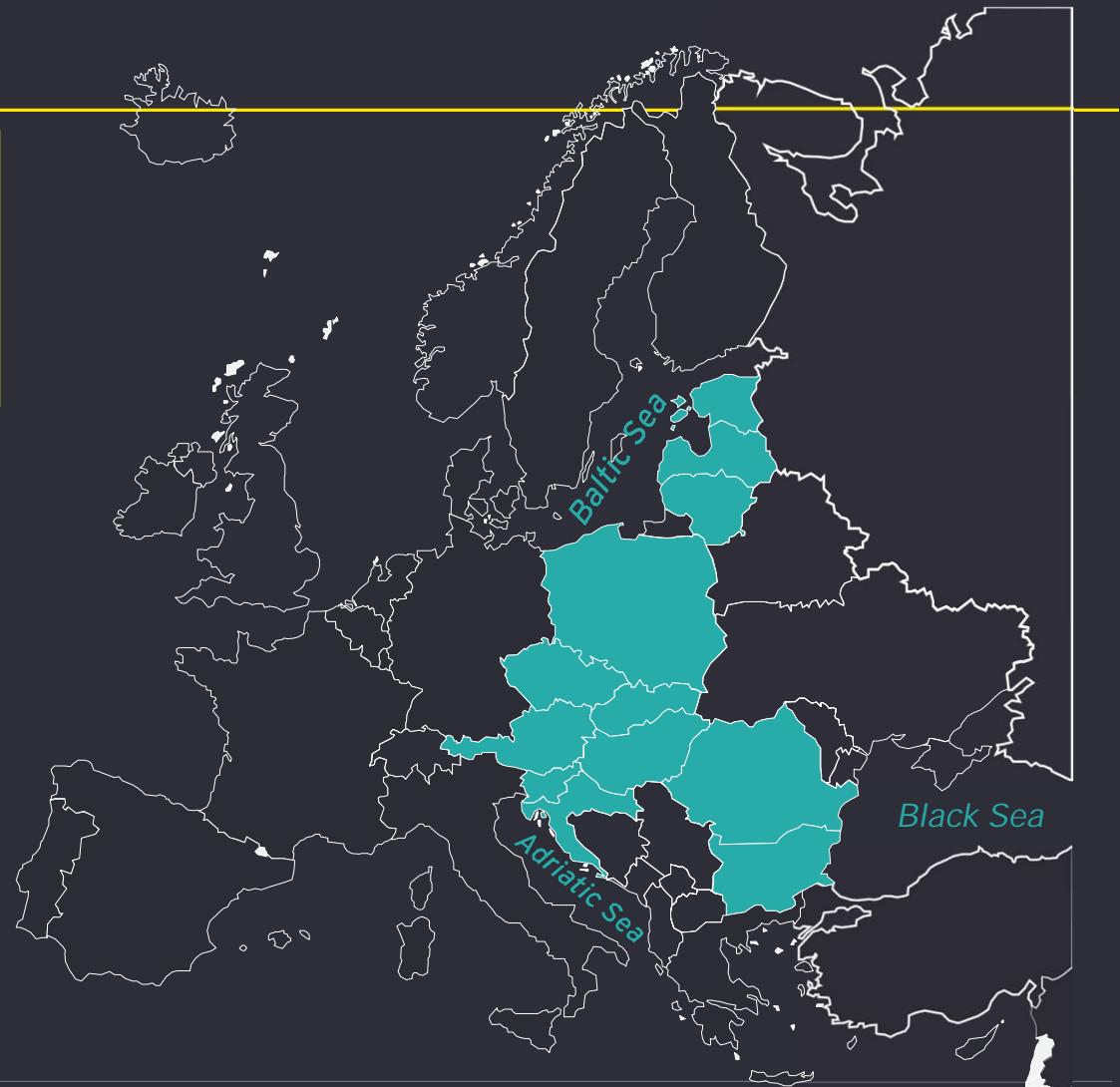
Forum of cooperation among:

Austria, Bulgaria, Croatia, Czechia, Estonia, Hungary,
Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia

オーストリア、ブルガリア、クロアチア、チェコ、エストニア、ハンガリー、ラトビア、リトアニア、ポーランド、ルーマニア、スロバキア、スロベニア

Objectives:

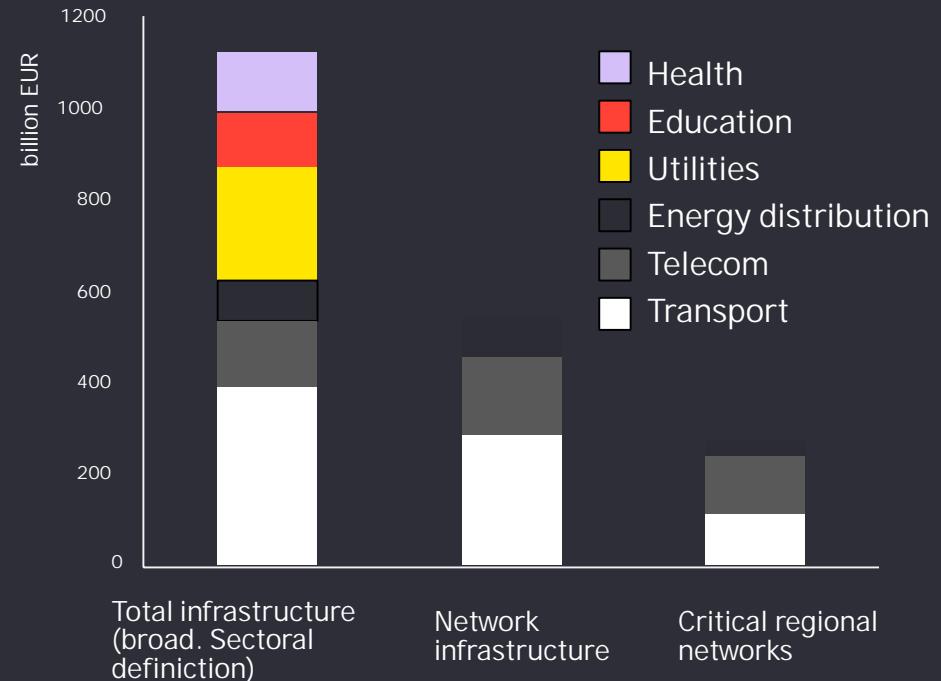
- Economic growth
 - Security
 - Stronger and more cohesive Europe
-
- 経済成長
 - セキュリティ
 - 強固でまとまりのあるヨーロッパ



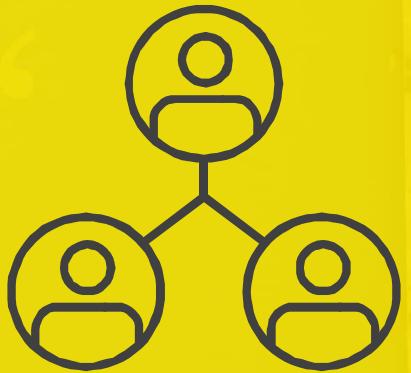
Three Seas Initiative

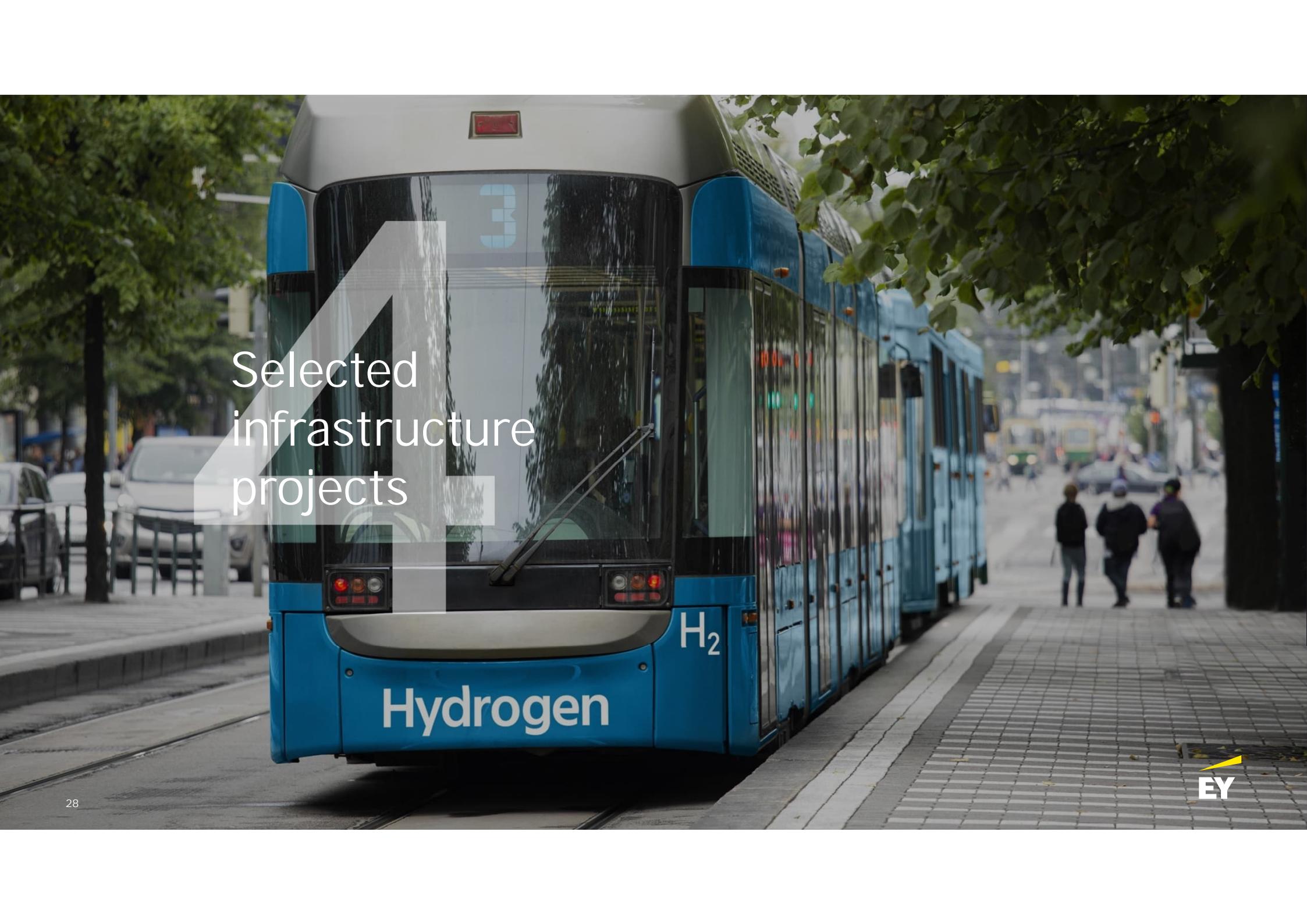


Identified infrastructure investment needs until 2030
特定された2030年までのインフラ投資ニーズ



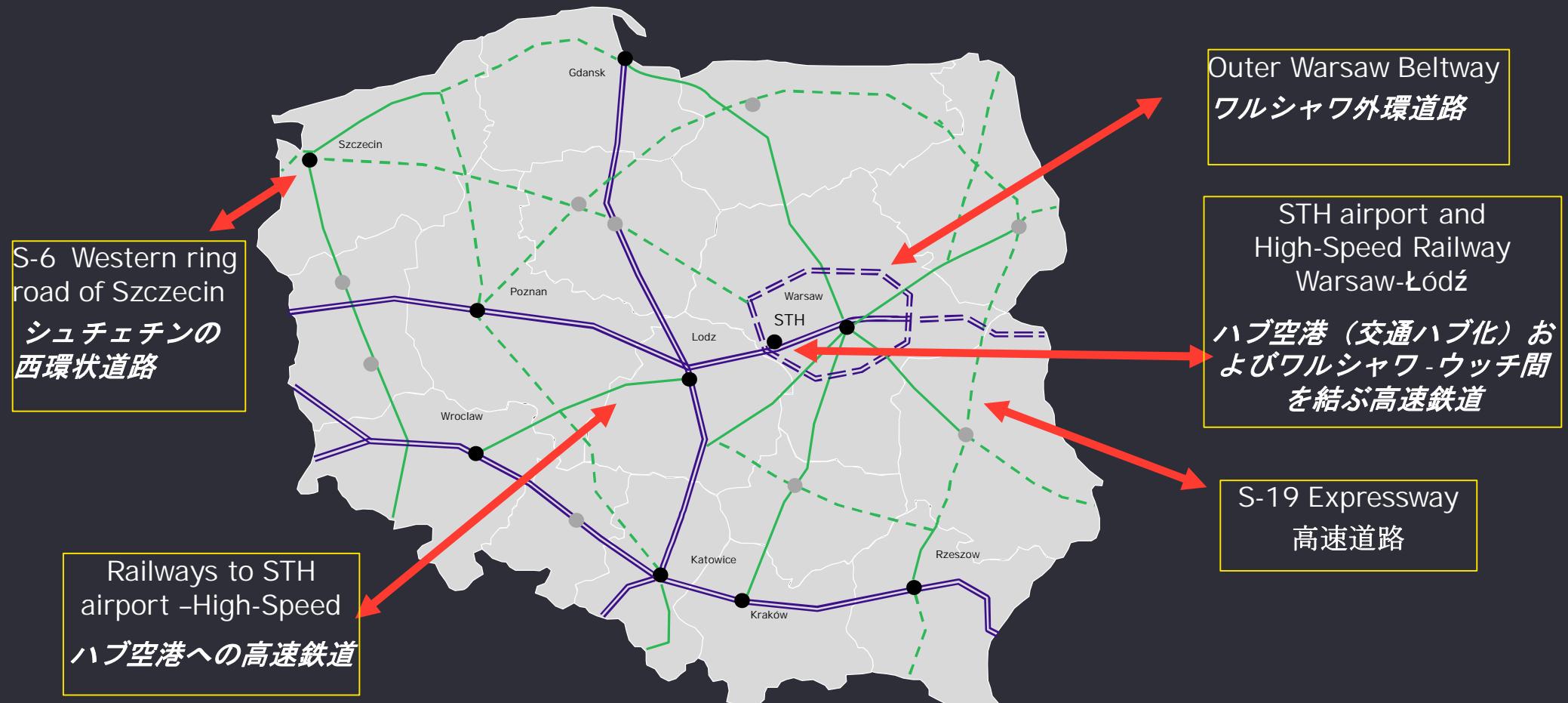
Q&A



A blue hydrogen fuel cell tram is shown on a city street. The tram has "Hydrogen" written on the front and "H₂" above the door. The number "3" is displayed on the front window. The tram is on tracks next to a sidewalk where people are walking. A white car is visible on the left. The background shows a blurred city street with other vehicles and buildings.

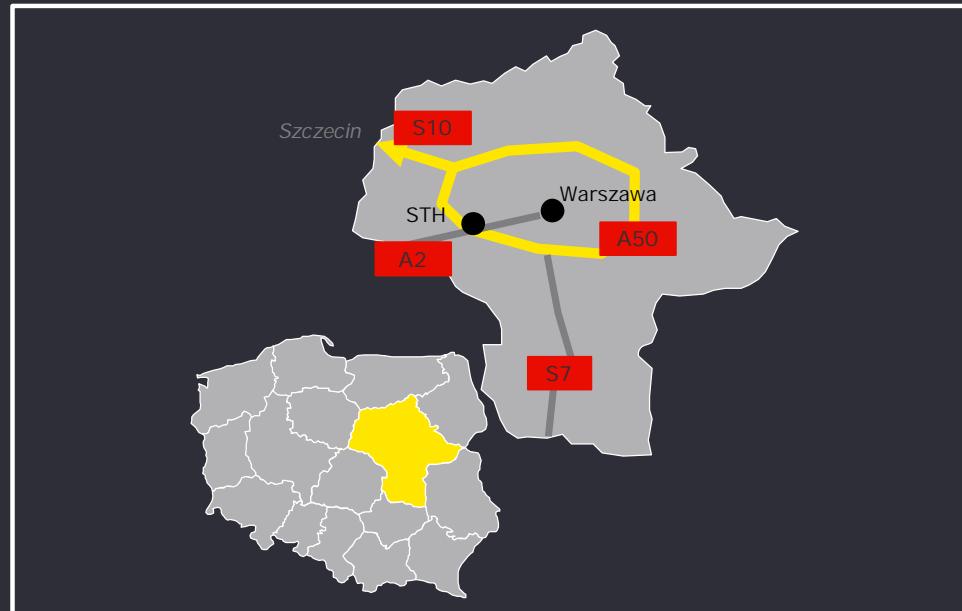
Selected infrastructure projects

Map of transport infrastructure

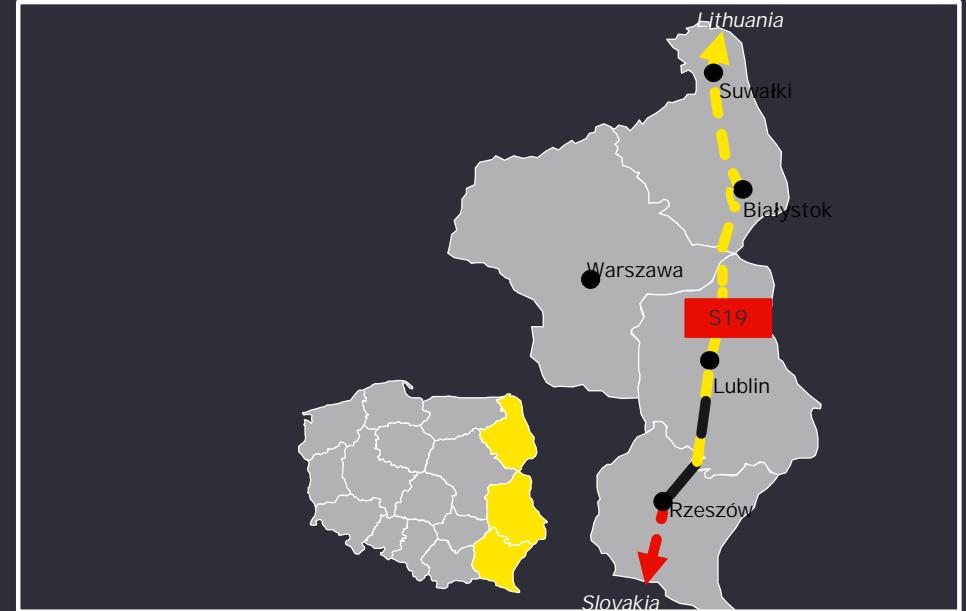


Selected Infrastructure projects | Transport

Outer Warsaw Beltway - ウルシヤワ外環道路
STH access roads
Estimated CAPEX
€ 2.4b



S-19 Expressway - 高速道路 -
Via Carpatia route カルパティアルート
Estimated CAPEX
€ 1.5b



Selected Infrastructure projects | Transport

S6 - Western ring road
of Szczecin
Estimated CAPEX
€ 2.4b

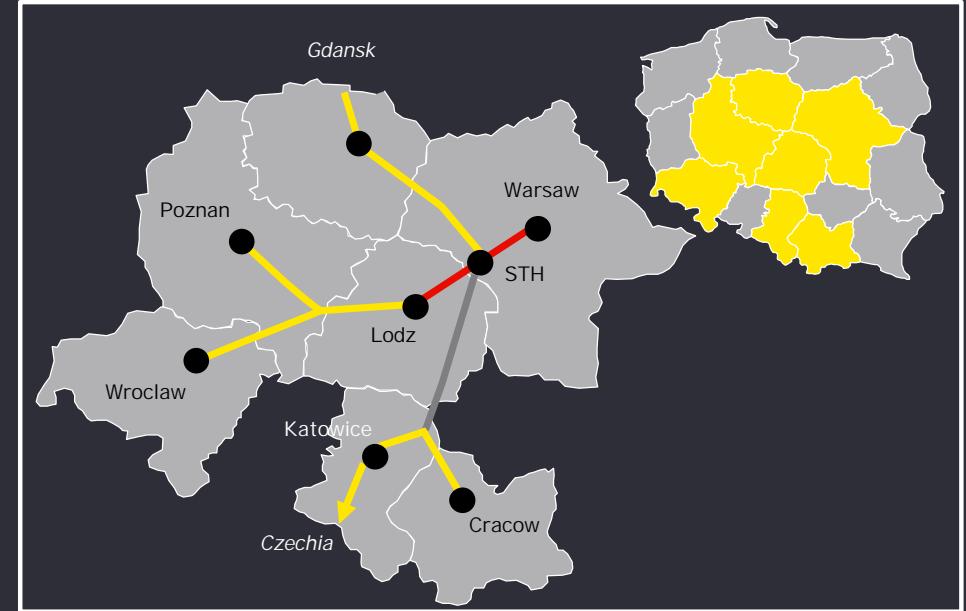
シュチェチンの
西環状道路



Railways to STH airport -
High-Speed railway
Warsaw-Łódź
Estimated CAPEX

€ 8.8b

ハブ空港へ繋がる
鉄道および、ワル
シャワ-ウツチ間の
高速鉄道



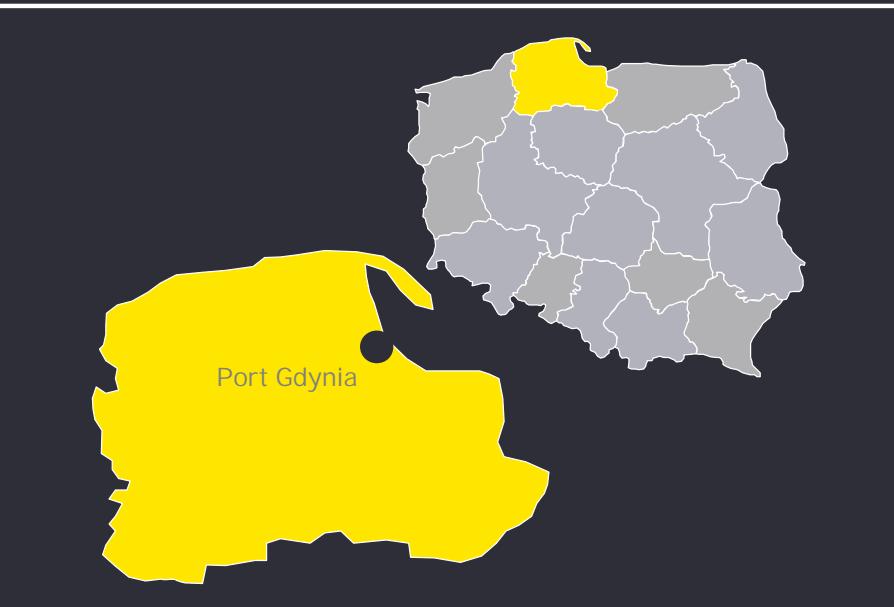
Selected Infrastructure projects | Transport

Outer Port Gdynia

Estimated CAPEX

€ 0.7b

グディニヤ港関連
プロジェクト

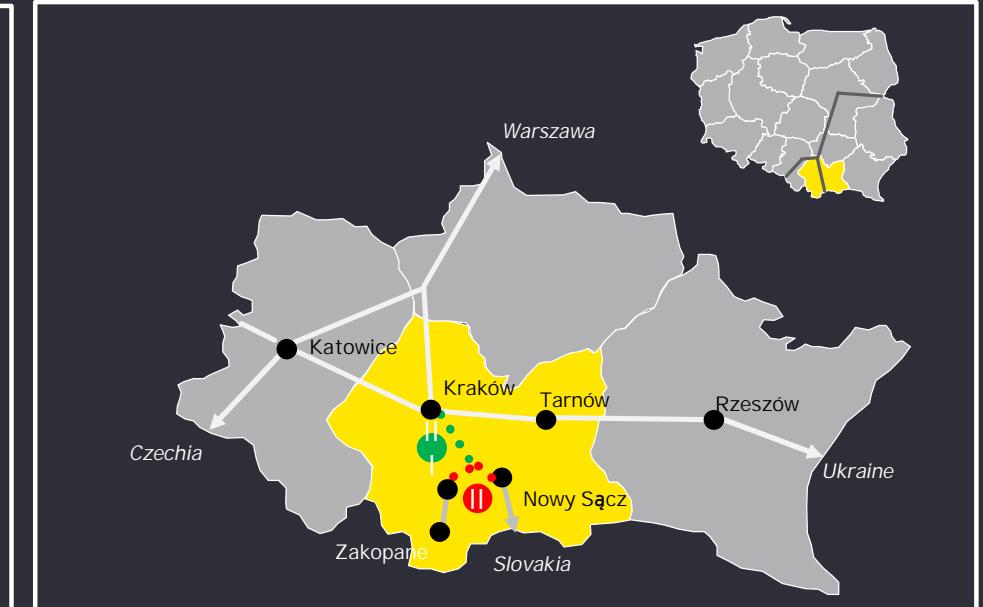


Railway Podłęże-
Piekietko

Estimated CAPEX

€ 1.63b

ポドウェンジエ -
ピエキエウコ間
鉄道



Selected Infrastructure projects | Transport

Deep Water Container
Terminal Świnoujście
Estimated CAPEX

€ 1.1b

シフィノウイシ
チエ港の大型コン
テナ対応可能化

Seaport for offshore
wind Energy in Gdynia
Estimated CAPEX

€ 437m

グディニアの海上
風力エネルギーの
ための港

Świnoujście

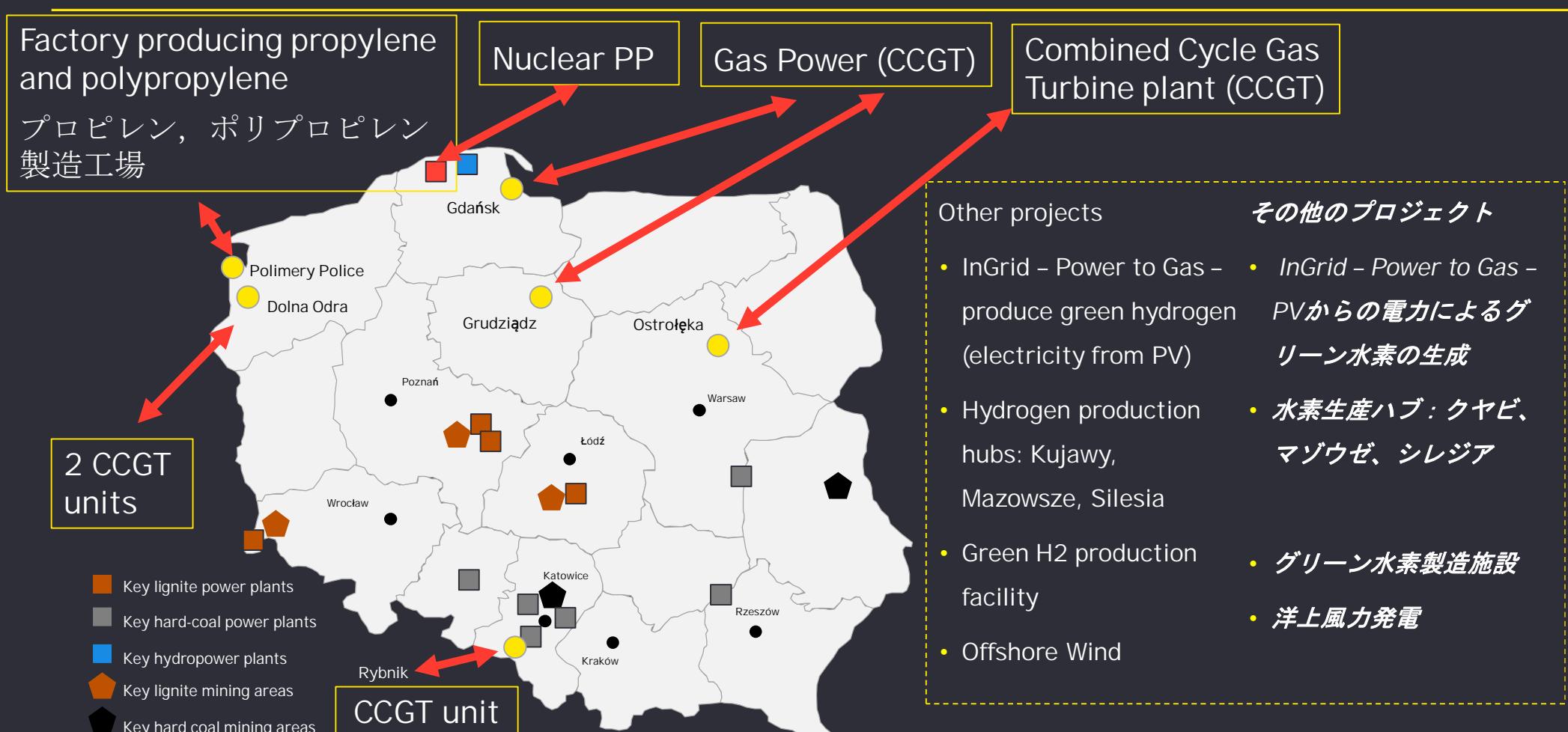
S6

Szczecin

Czechia

Port Gdynia

Selected Infrastructure projects | Energy



Selected Infrastructure projects | Telecommunications & IT

- Providing access to very fast Internet
CAPEX EUR 1400m
 - Providing universal access to high-speed Internet - development of network infrastructure
CAPEX EUR 1200m
 - Equalizing the level of equipping schools with portable multimedia devices
CAPEX EUR 550m
 - Development of the digital environment of preschool education and general education
CAPEX EUR 700m
 - Broader use of digital technologies in public administration
CAPEX EUR 420m
 - Increased security in cyberspace
CAPEX EUR 443m
 - Increasing the use of satellite data for the needs economy and the state
CAPEX EUR 150m
- 超高速なインターネット回線へのアクセス
(**投資額** : €1,400m)
 - 高速ネットワークへの自由なアクセス、ネットワーク・インフラの整備 (**投資額** : €1,200m)
 - 学校にポータブルデバイスを均等に行き渡らせる
(**投資額** : €550m)
 - 就学前教育、一般教育向けのデジタル環境整備
(**投資額** : €700m)
 - 行政におけるデジタル技術の幅広い活用
(**投資額** : €420m)
 - サイバースペースのセキュリティ強化
(**投資額** : €443m)
 - 国家および経済のニーズを満たすため、衛星データの活用を促進する (**投資額** : €150m)

Q&A



Contact details



Maciej Ziomek
Associate Partner, EY Poland
Mobile + 48 519 511 468
Email Maciej.Ziomek@pl.ey.com



Jarosław Wajer
Partner, EY CESA Energy Leader
Mobile + 48 519 511 468
Email Jaroslaw.Wajer@pl.ey.com



Jakub Adamski
Manager, EY Poland
Mobile + 48 519 033 708
Email Jakub.Adamski@pl.ey.com



Yasushi Matsumoto
Assistant Director, Japan Business Services
Mobile +48 573 339 439
Email Yasushi.Matsumoto@pl.ey.com



Andrzej Sajkiewicz
Japan Business Services
Mobile +48 609 222 787
Email Andrzej.Sajkiewicz@pl.ey.com