

POLISH INFORMATION
AND FOREIGN INVESTMENT AGENCY

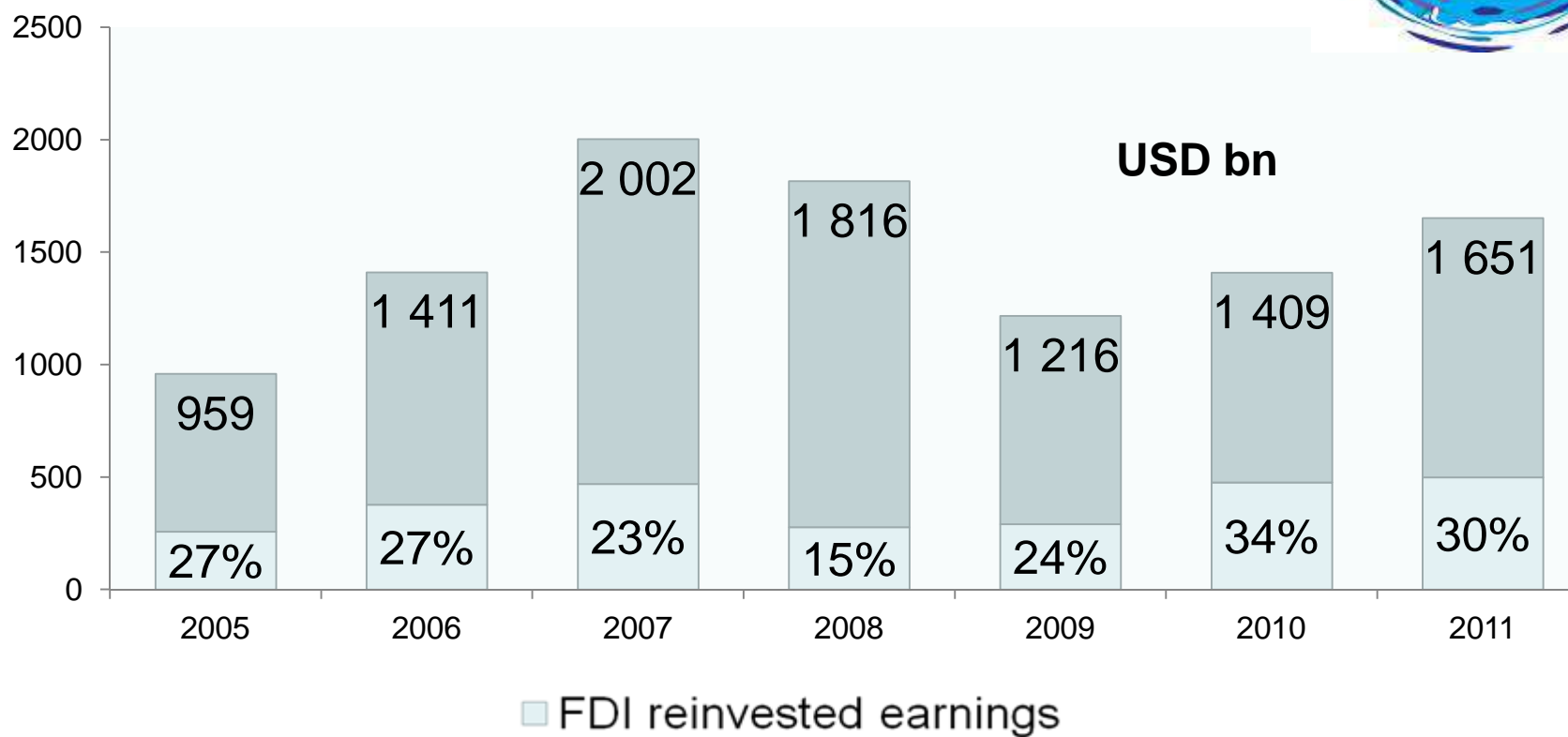
Importance of reinvestments for Poland

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Director
Foreign Investment Department

Warsaw, September 11, 2013

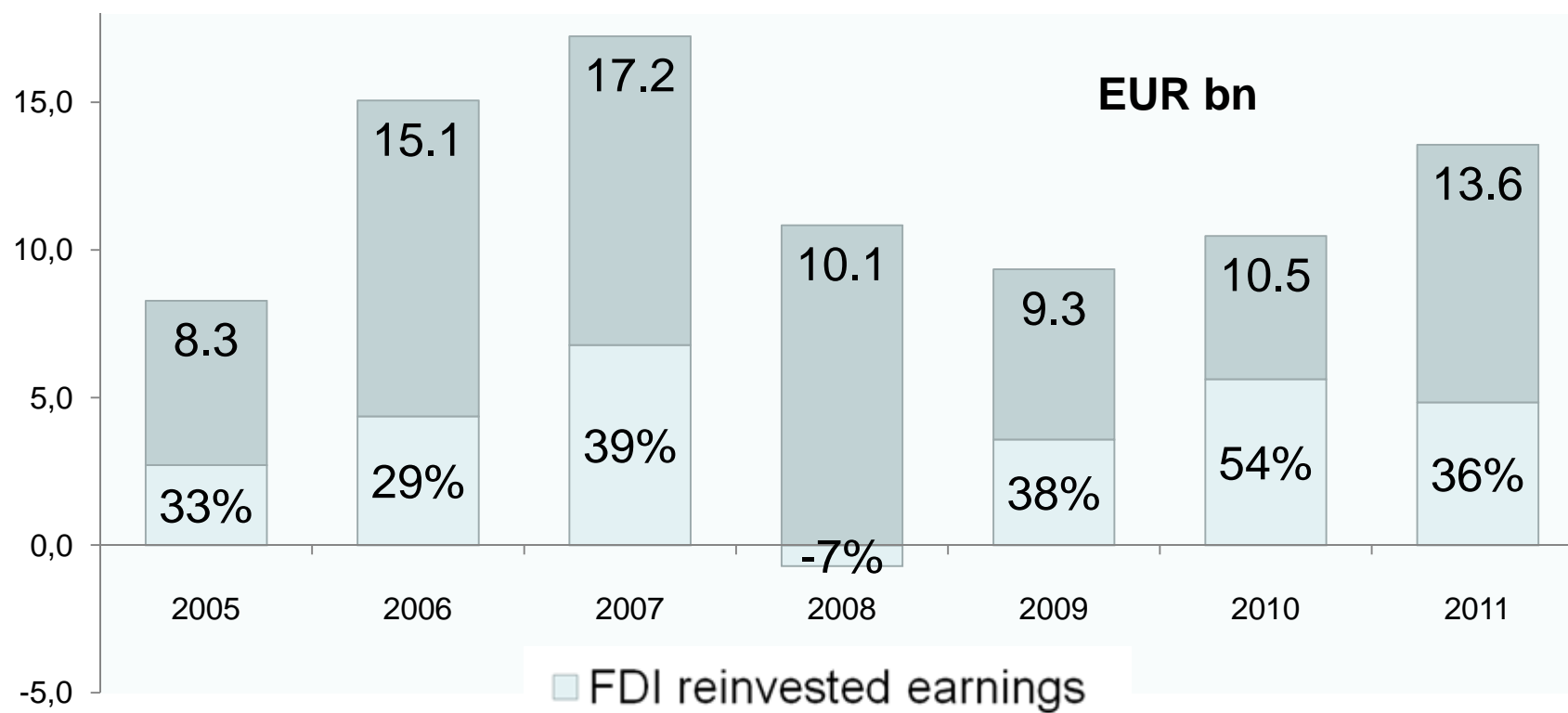


World: FDI and reinvested earnings 2005-2011

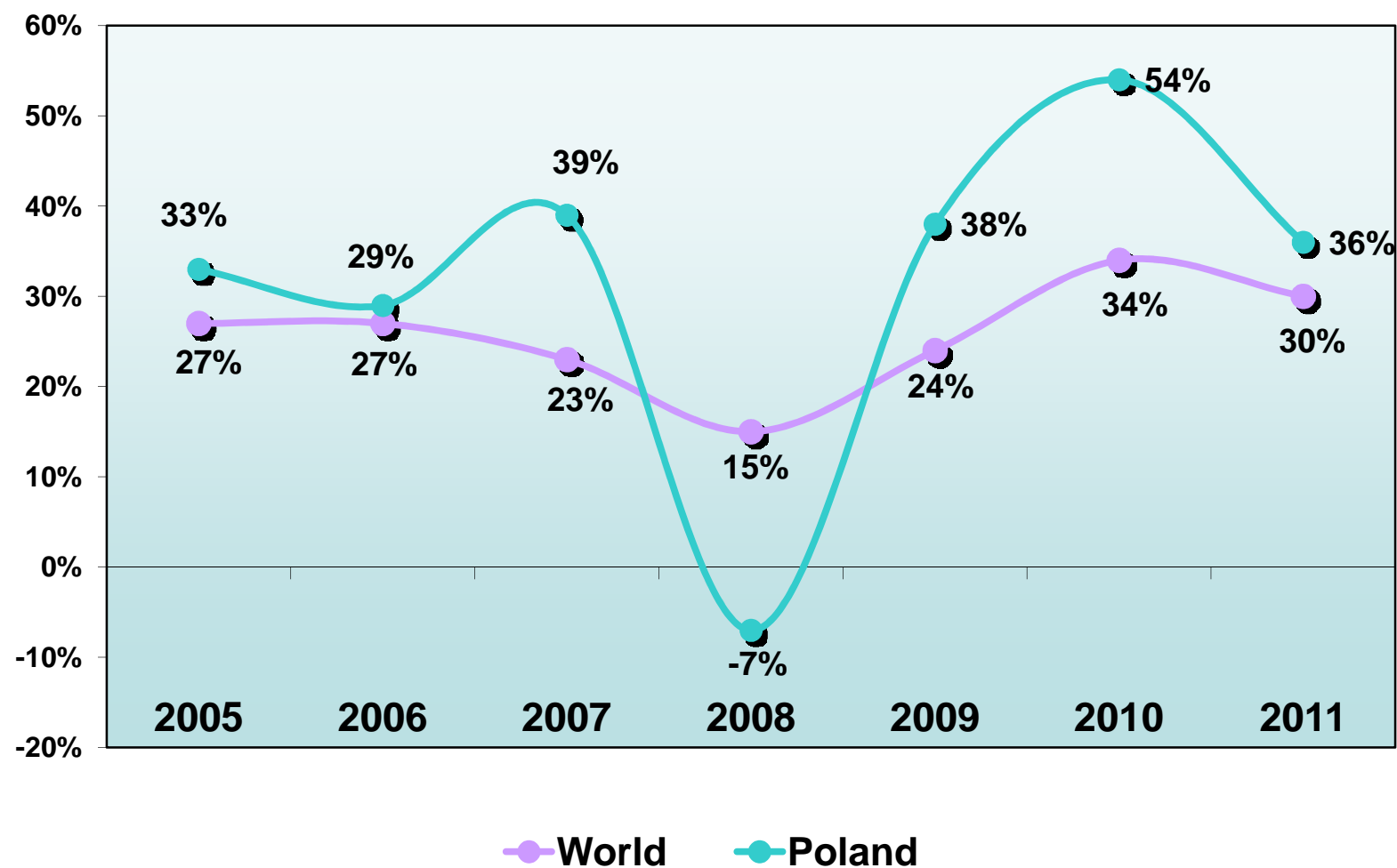


Poland: FDI and reinvested earnings 2005-2011

NBP



Reinvested earnings: Poland vs world 2005-2011



Why do reinvestments pay off?

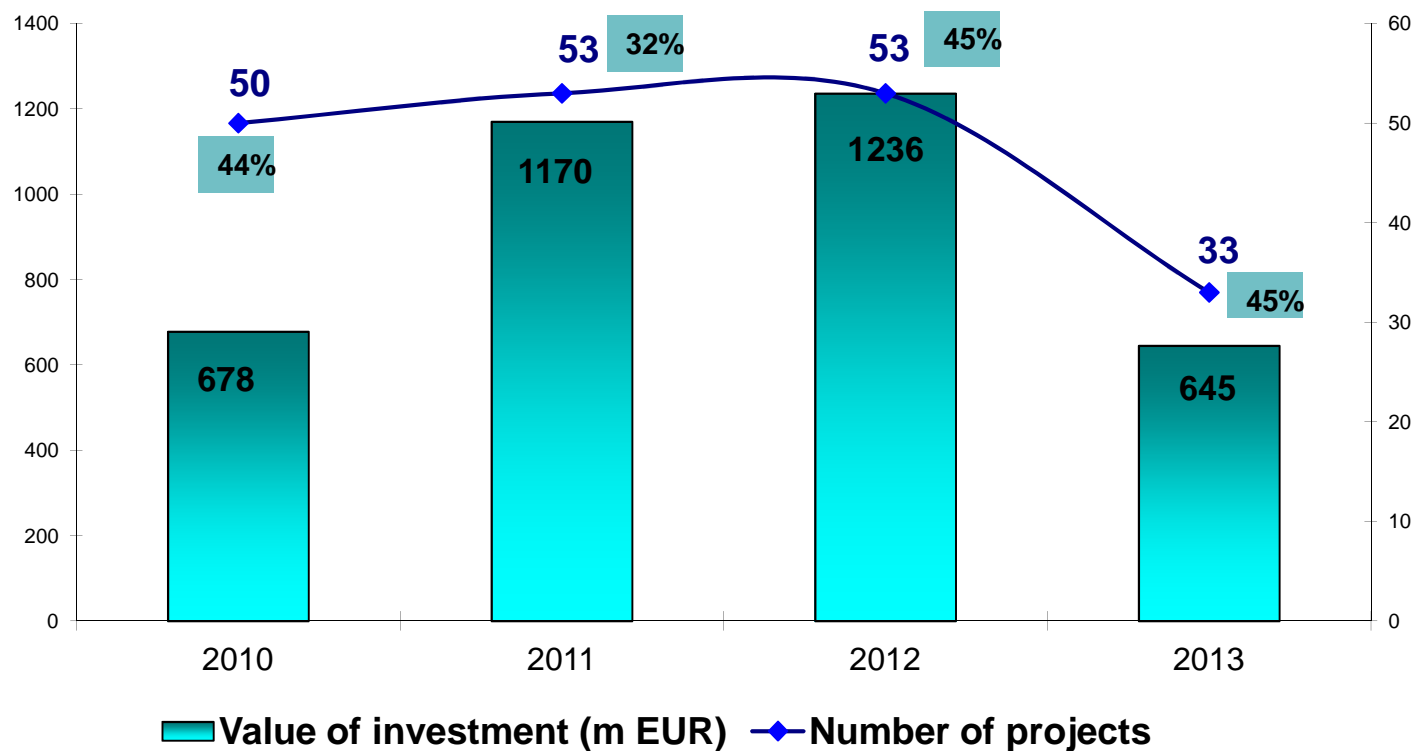
to the company



to the host country

- ✓ costs reduction
- ✓ faster procedures
- ✓ elimination of new market risks
- ✓ familiar environment
- ✓ cooperation network in place
- ✓ retaining is cheaper
- ✓ faster deal
- ✓ confirmation of attractiveness
- ✓ growing complexity of business
- ✓ snow ball effect
- ✓ organic growth

FDI and reinvestments PAIIZ - projects completed in 2010-2013 -



| Average share of reinvestments | Number of projects | Value | Employment |
|--------------------------------|--------------------|-------|------------|
| | 41% | 61% | 49% |

Active projects serviced by PALiZ

As of September 2013, PALiZ assisted 163 potential investments:

- Value of investment: **EUR 4.8 bn**
- Number of new work places: **31.9 thous.**
- Main sectors:
 - **BSS + ICT (46)**
 - **automotive (30)**
 - **R&D (13)**
 - **Food-processing (10)**
- Major countries-investors:
 - **USA (44)**
 - **Germany (21)**
 - **China (14)**
 - **Japan (8)**



Reinvestments among PALiZ active projects

As of September 2013, PALiZ assisted 163 potential investments

| | Number | Value (bn EUR) | Employment |
|-------------------------------|--------|-------------------|------------|
| Planned FDI | 163 | 4,8 | 31,908 |
| Planned reinvestment | 64 | 1,4 | 15,244 |
| Share of reinvestments | 39% | 28% | 48% |

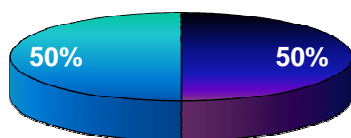


Sectors

Countries

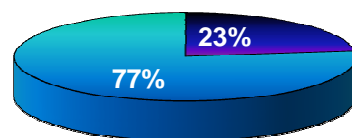
Automotive

■ FDI plans ■ Reinvestments



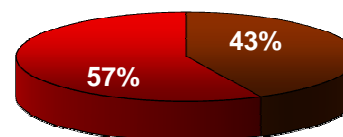
R&D

■ FDI plans ■ Reinvestments



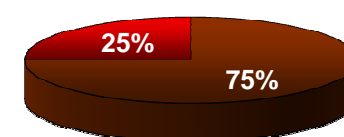
Germany

■ Total FDI ■ Reinvestments

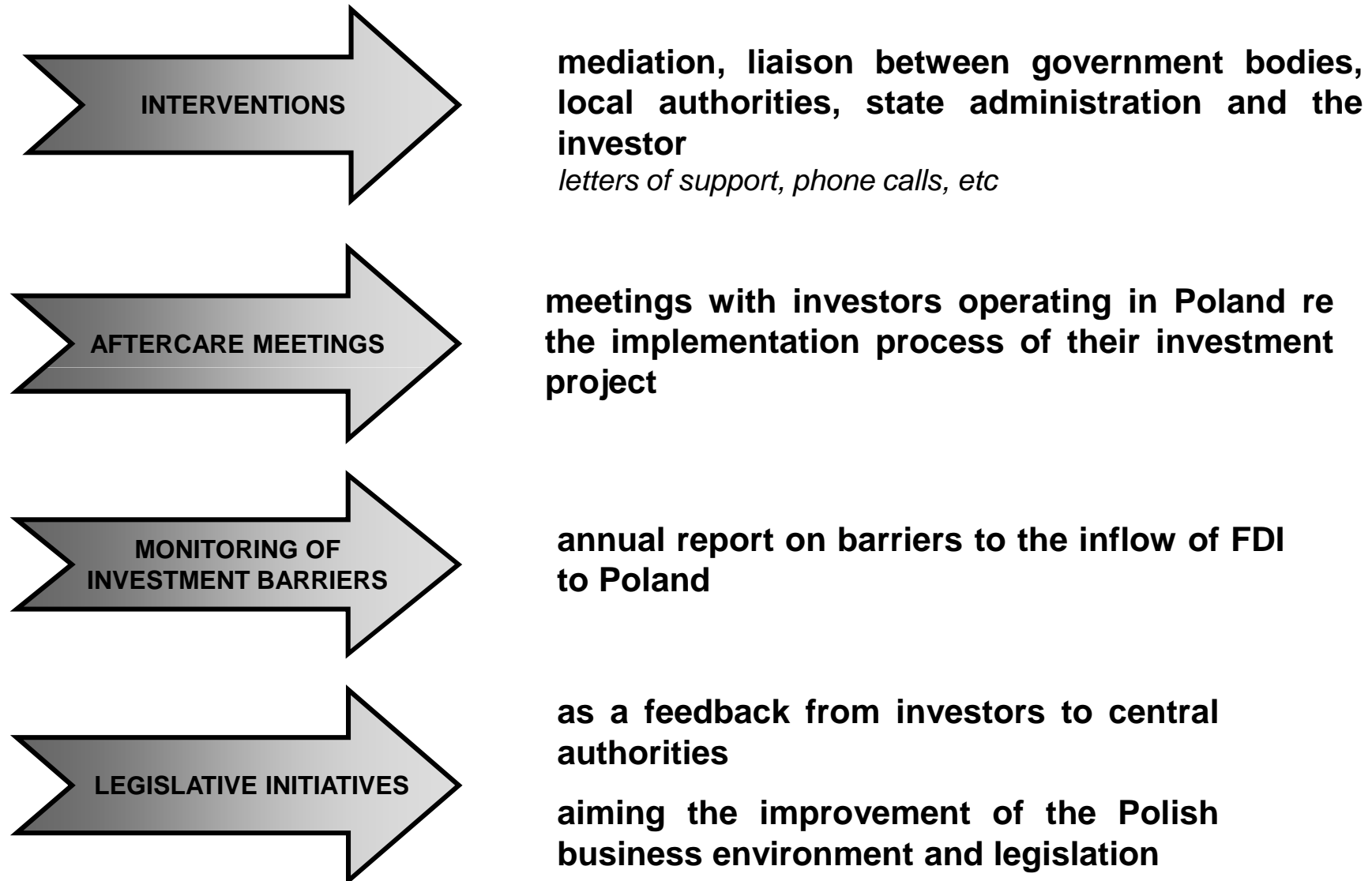


Japan

■ FDI plans ■ Reinvestments



Scope of services offered by PAIIZ



Reinvestment - case study

faurecia

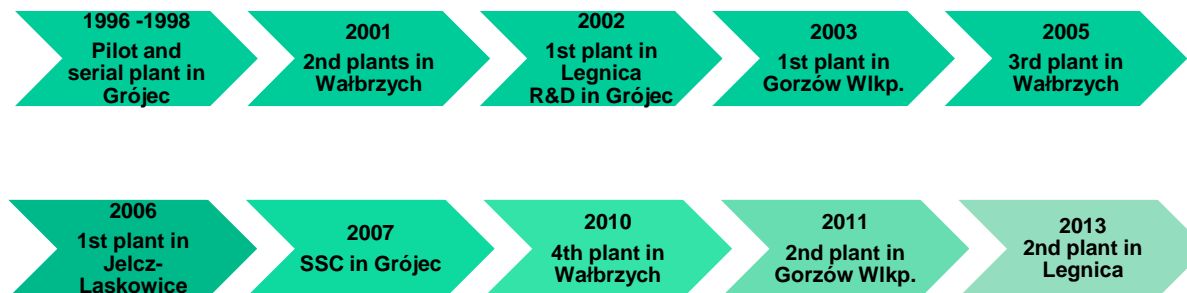
Key facts

- 10 plants
- 2 business groups: automotive seatings and interior systems
- 5 locations in Poland in 3 provinces
- 6,333 employees
- Shared Services Center for CEE
- Wide range of R&D operations

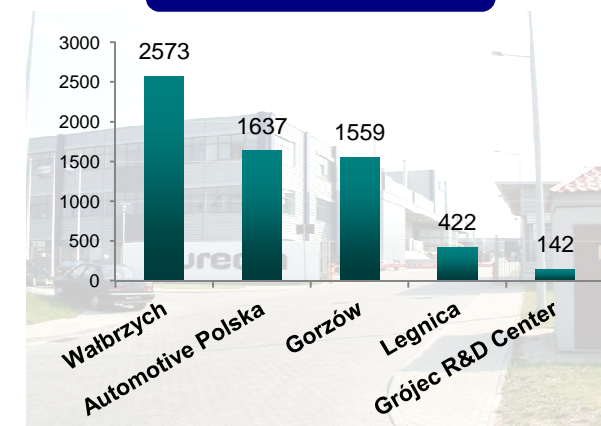
Locations



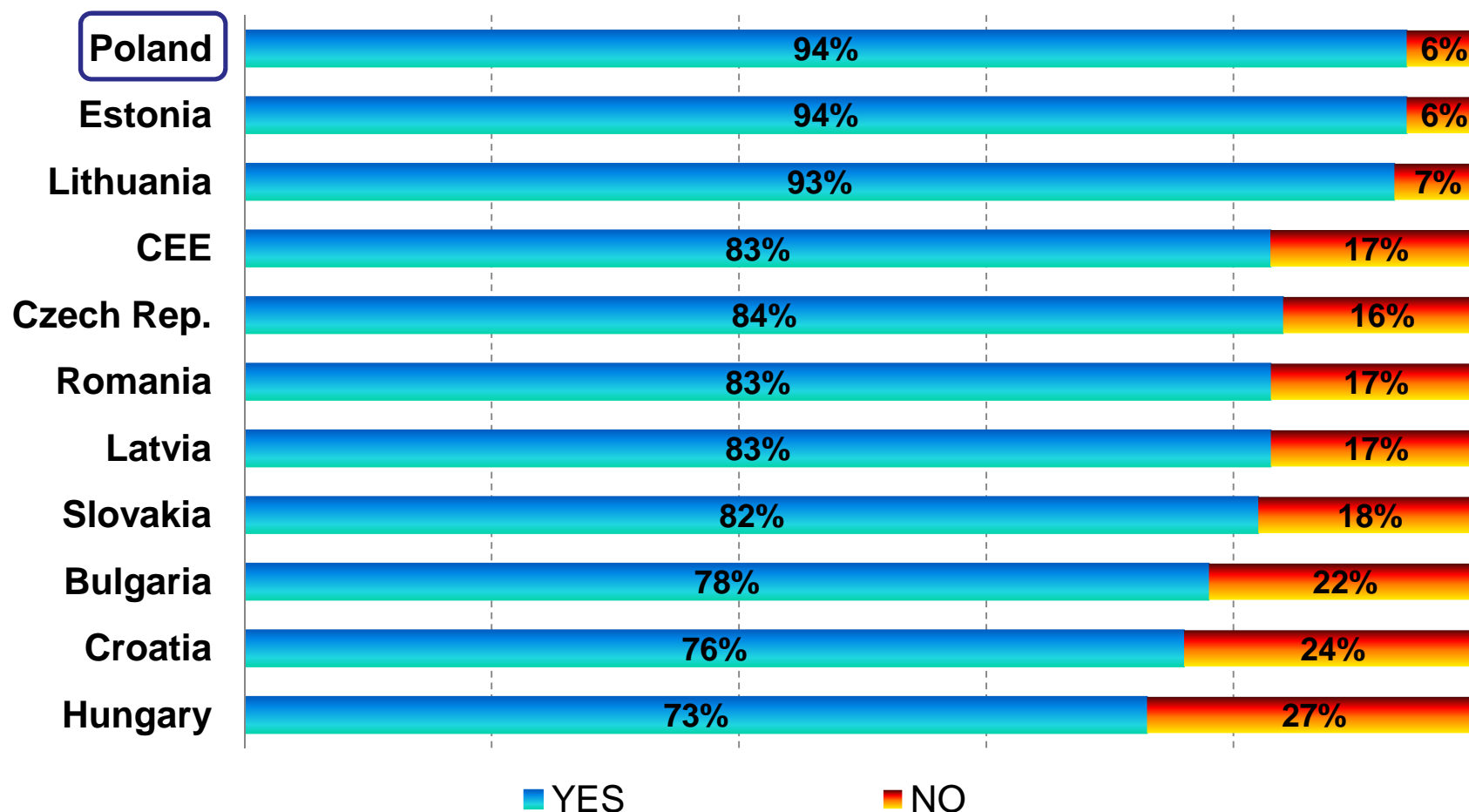
History



Employment



Would you invest again in the location of your investment?



Thank you for your attention

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