

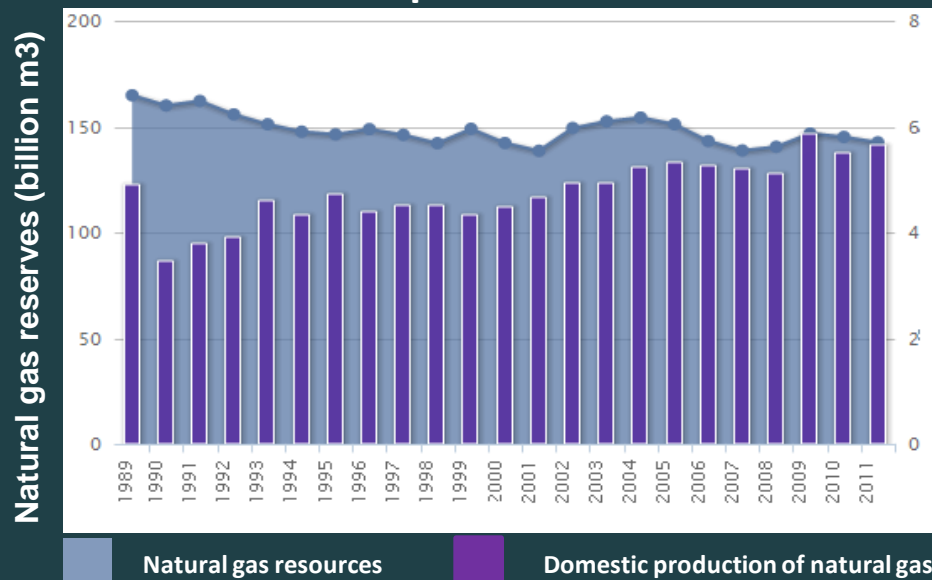


Ministry
of Foreign Affairs
Republic of Poland

Natural gas imports

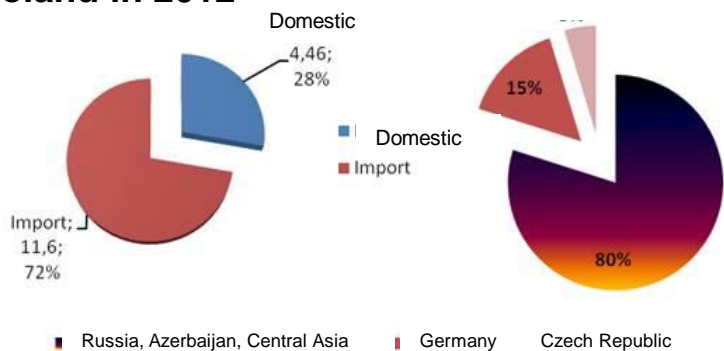


Polish natural gas resources and production



Natural gas production (billion m3)

Share in the import of natural gas to Poland in 2012





Ministry
of Foreign Affairs
Republic of Poland

Poland's global position

6th place in Europe in terms of the number of investment projects (237) carried out in 2012

(2013 Global Greenfield Investment Trends FDI Report)



1st place in Central and Eastern Europe - most attractive country in the region

1st place in terms of the number of investment projects in Central and Eastern Europe in 2012

3rd place in Europe in terms of the number of jobs created thanks to FDI

Poland recorded the highest increase in the number of investment projects and jobs created thanks to foreign direct investment (FDI) in all of Europe

(Ernst & Young, European Attractiveness Survey Europe 2013)





Ministry
of Foreign Affairs
Republic of Poland

Poland's global position

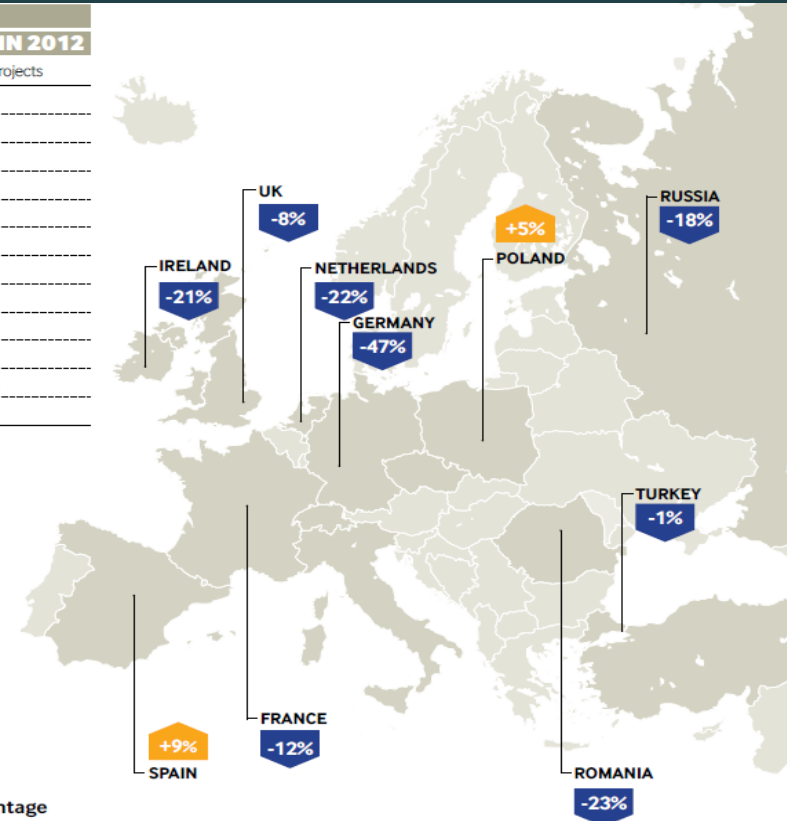
6th place in Europe in terms of the number of investment projects (237) carried out in 2012

5% increase in the number of greenfield projects in Poland in 2012. Among European countries, apart from Poland, only Spain recorded an increase.

TOP 10 DESTINATION COUNTRIES IN EUROPE IN 2012

Country	Number of projects
UK	812
Germany	410
Spain	278
Russia	265
France	244
Poland	237
Ireland	147
Netherlands	145
Romania	138
Turkey	133
Other	1082
Total	3891

Source: fDi Markets



► This map shows the percentage change on 2011

Source: fDi Markets

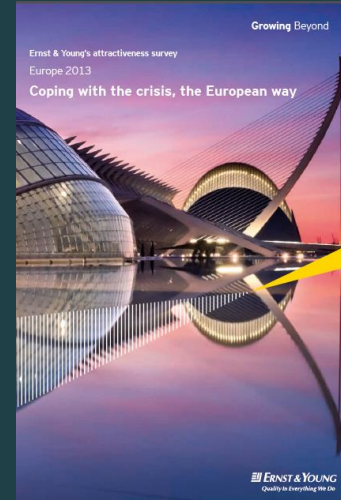


Poland's global position

Number of FDI projects in Europe

krajach europejskich

Place	Country	2011	2012	Change	Share (2012)
1	Poland	21	148	22.3%	3.9%
2	Finland	62	75	21.0%	2.0%
3	Serbia	67	78	16.4%	2.1%
4	Ireland	06	123	16.0%	3.2%
5	Belgium	53	169	10.5%	4.5%
6	Germany	97	624	4.5%	16.4%
7	UK	79	697	2.7%	18.4%
8	Spain	73	274	0.4%	7.2%
9	Russia	28	128	0.0%	3.4%
10	Turkey	97	95	-2.1%	2.5%
11	Czech Rep.	66	64	-3.0%	1.7%
12	Netherlands	70	161	-5.3%	4.2%
13	France	40	471	-12.8%	12.4%
14	Italy	80	60	-25.0%	1.6%
15	Switzerland	99	61	-38.4%	1.6%



Poland is the European growth leader and the most attractive country in the region.

Poland recorded the highest increase in the number of investment projects and jobs created by foreign direct investments (FDI) in Europe.



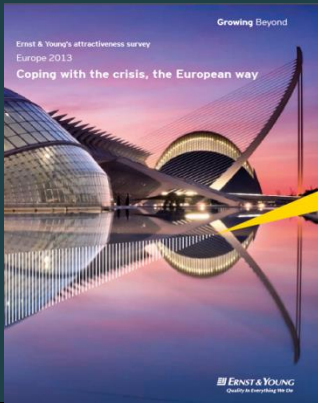
Poland's global position

13 111 – number of jobs created in Poland in 2012 through FDIs, giving Poland 3rd place in Europe behind the United Kingdom and Russia, and ahead of Germany and France.

Poland still has a massive capacity to attract large investment projects, not only from the shared services industry, but also in production.

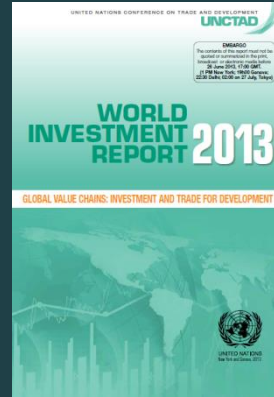
Increase in the number of jobs created by FDI in European countries

Place	Country	2011	2012	Change	Share (2012)
1	Poland	7,838	13,111	67.3%	7.7%
2	Ireland	5,373	8,898	65.6%	5.2%
3	Bulgaria	2,680	4,379	63.4%	2.6%
4	Russia	8,362	13,356	59.7%	7.8%
5	Slovakia	4,007	6,299	57.2%	3.7%
6	Macedonia	3,040	4,670	53.6%	2.7%
7	Turkey	7,295	10,146	39.1%	6.0%
8	Romania	5,985	7,114	18.9%	4.2%
9	Spain	9,205	10,114	9.9%	5.9%
10	Czech Rep.	5,168	5,508	6.6%	3.2%
11	UK	29,888	30,311	1.4%	17.8%
12	Germany	17,276	12,508	-27.6%	7.3%
13	Hungary	5,237	3,941	-24.7%	2.3%
14	Serbia	13,479	10,302	-23.6%	6.0%
15	France	13,164	10,542	-19.9%	6.2%
16	UK	29,888	30,311	1.4%	17.8%

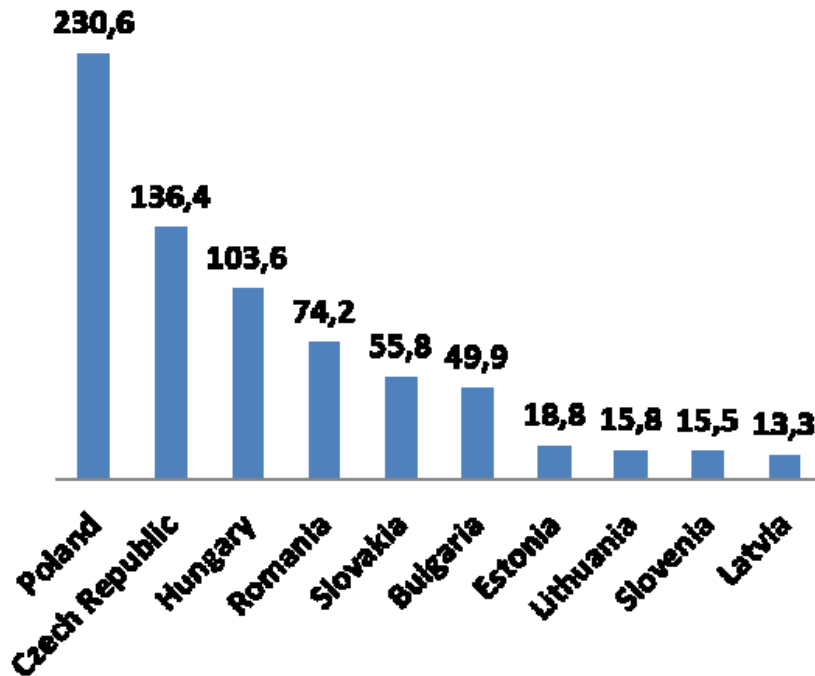




Poland's global position



FDI size in Poland and new EU countries in 2012, in USD billions



Source: *World Investment Report, UNCTAD 2013*, Prof. Z. Zimny, Warsaw 2013.

According to *World Investment Report 2013*, in the annual UNCTAD survey, which asked investors about the most attractive countries for investments,

In 2013-2015, **Poland ranked 4th in Europe and the 14th globally.**

Among the **20 most attractive global FDI destinations**, there are only five European countries, including **Poland - the only country from Central and Eastern Europe.**



Ministry
of Foreign Affairs
Republic of Poland

Thank you for your attention.