



Overall performance

Poland's regulatory framework and infrastructure governance systems are designed to encourage private investment and industry competition. Despite these systems and strong infrastructure funding capacity, infrastructure activity and private infrastructure investment remain low. To encourage greater investment and improve competition Poland could do more to support the creation of new businesses. This could be done by reducing start-up costs, the time required to start a business, or by improving the efficiency of processes to register property.

Drivers	Rank (/16)	Rank change (2017-20)	Score (/100)	Emerging	Aspiring	Contender	Top performer	Global leader
Governance	21	↓ 1	68	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Regulatory frameworks	22	↓ 4	70	Green	Green	Green	Green	Green
Permits	64	↓ 16	47	Blue	Blue	Blue	Blue	Blue
Planning	40	↓ 3	73	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Procurement	39	↓ 28	75	Light Green	Light Green	Light Green	Light Green	Light Green
Activity	66	↓ 2	18	Teal	Light Blue	Light Blue	Light Blue	Light Blue
Funding capacity	29	↓ 2	47	Orange	Orange	Orange	Orange	Orange
Financial markets	41	↓ 1	32	Yellow	Yellow	Yellow	Yellow	Yellow

Poland at a glance

\$14,902
GDP per capita
(USD, 2019)

38 million
Population
(2019)

3.6% of GDP
Infrastructure investment
(2019 estimate)

0.5% of GDP
Infrastructure gap
(2019 estimate)

81.2
Infrastructure quality
(0-100, 100 is best, 2019)

\$249 million
Private infrastructure investment
(5-year average, USD, 2019)

Top performing metrics



90.4/100

Financial stability

Poland ranks among the most financially stable countries in InfraCompass 2020. The stability of the financial system facilitates the smooth flow of funds between parties, improving the supply of capital for projects. The COVID-19 pandemic may impact this.



87.5/100

Strength of insolvency framework

The World Bank rates the strength of Poland's insolvency framework highly. Strong insolvency protections help to attract investment in infrastructure.



87/100

Procurement of PPPs

Poland's legal and regulatory frameworks which govern how private partners are selected for PPPs encourage fairness and transparency. Fair and transparent processes encourage more participation and competition, which drive value for money and better quality outcomes.

Opportunities to grow



No

Published infrastructure plan

Poland does not have a national or sub-national infrastructure plan. The addition of an infrastructure plan could highlight infrastructure challenges and opportunities for investment, as well as detail the government's planned responses.



0/100

Registering property

In Poland it takes 135 days to register a property, significantly above the 25 day average for High Income Countries. As infrastructure projects often involve some transfer of property rights, a lengthy registration process increases project cost and risk.



0.9/100

Value of closed PPP infrastructure deals

The value of closed PPP infrastructure deals in Poland is the second lowest out of High Income Countries, at 0.005% of GDP. This is a fraction of the High Income Countries' average of 0.14%. A low value may reflect a preference for traditional delivery models.

For guidance on how to improve these metrics, please see the [Poland Country Page](#) on the InfraCompass website.



ECONOMY OVERVIEW

GDP (\$US billion, 2019)	565.9	Population (million, 2019)	38	Unemployment rate (2019)	3.3%
GDP per capita (\$US, 2019)	14,902	Urbanisation ratio (2018)	60.0%	Inflation rate (2019)	2.4%
GDP growth rate (annual, 2019)	4.0%	Gross Government Debt (% of GDP, 2019)	48.0%	Digital Adoption Index (0-1 best, 2016)	0.69
GDP per capita growth rate (annual, 2019)	-3.4%	Sovereign risk rating (2019)	71	Gini coefficient (0-100 worst, 2015)	31.8

METRIC SCORES

The below metrics are normalised so that they all range from 0 to 100. For original metrics and data sources, please see <https://infracompass.github.org/>

GOVERNANCE		REGULATORY FRAMEWORKS		PERMITS	
Post-completion reviews?	Yes -	Effect of taxation on incentives to invest	37.7 ↓	Cost to start a business	76.7 ↑
Infrastructure or PPP unit/agency?	Yes -	Prevalence of foreign ownership	65.6 ↓	Dealing with construction permits	56.6 -
Recovery rate	60.9 ↑	Product market regulation, network sectors	59.2 -	Quality of land administration	63.3 ↓
Rule of law	58.6 ↓	Regulatory (including competition) quality	67.6 ↓	Registering property	0 ↓
Shareholder governance	50 -	Strength of insolvency framework	87.5 -	Time required to start a business	18.2 -
Political stability and absence of violence	59.1 ↑	Investment promotion agency?	Yes -		
PLANNING		PROCUREMENT		ACTIVITY	
Published project pipeline?	Yes -	Average procurement duration – transaction RFP	66.2 -	Infrastructure investment	44.5 ↓
Published infrastructure plan?	No -	Degree of transparency in public procurement	50 ↓	Private infrastructure investment	4.2 ↓
Preparation of PPPs	65 ↑	Published procurement guidelines?	Yes -	Value of closed PPP infrastructure deals	0.9 ↓
Economic analysis assessment?	Yes -	Procurement of PPPs	87 -	Value of closed infrastructure deals with foreign equity sponsorship	23.1 ↑
Market sounding and/or assessment?	Yes -	PPP contract management	54 -		
Environmental impact analysis?	Yes -				

FUNDING CAPACITY

FINANCIAL MARKETS

GDP per capita	19 ↑	Domestic credit to private sector	25.3 ↓
Gross government debt	62.6 ↑	Financing through local equity market	42.7 ↑
Long term GDP growth trend	32.9 ↓	Stocks traded	8.5 ↓
Summary credit rating	71 ↑	Financial depth	41.8 ↓
		Financial stability	90.4 ↓

Drawing on data from: International Monetary Fund, Organisation for Economic Co-operation and Development, World Bank, World Economic Forum, IJ Global, CEPII, Oxford Economics, Trading Economics, and Deloitte.

Metric key:

↑ Increase from InfraCompass 2017 ↓ Decrease from InfraCompass 2017 - No change from InfraCompass 2017

Note:

'Top performing metrics' are the metrics with the highest score out of 100.

'Opportunities to grow' are generally the metrics with the lowest weighted score out of 100.