



2022 SME COUNTRY FACTSHEET'S EVIDENCE BACKGROUND DOCUMENT

Poland

This document faithfully reproduces evidence from various relevant sources, thus providing SME-focused “pure facts” in the form of concise facts. This factual information arises from national evidence, data and insights, such as the SME-relevant recent national studies, surveys, publications, policy measures, etc. (including those published only in the national language) as well as relevant international studies and other relevant sources, indicators and statistics.

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

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Factual SME-related evidence	Source
KEY NOWCASTS & FORECASTS  KEY NOWCASTS & FORECASTS	
In 2021, SMEs in Poland generated strong recovery growth, with growth rates of 7.9% in value added and 2.4% in employment, after declining by 2.7% and 1.4%, respectively, in 2020.	Estimates produced by JRC, based on figures from the Structural Business Statistics Database as well as provisional data for 2020-2021 from the National Accounts Database and the Short-Term Business Statistics Database.
The <i>digital</i> ecosystem was one of the few ecosystems in Poland that achieved positive growth rates in 2020, with SME value added increasing by 5.2% and SME employment by 2.5%. While SME employment continued to grow strongly by 6.4% in 2021, SME value added declined by 2.0%.	Estimates produced by JRC, based on figures from the Structural Business Statistics Database as well as provisional data for 2020-2021 from the National Accounts Database and the Short-Term Business Statistics Database.
SMEs in the <i>retail</i> ecosystem recovered both in terms of value added and employment in 2021, growing by 7.5% and 3.0% respectively, following a decline of 5.8% and 2.4% in 2020.	Estimates produced by JRC, based on figures from the Structural Business Statistics Database as well as provisional data for 2020-2021 from the National Accounts Database and the Short-Term Business Statistics Database.
Based on data from early 2022, it was expected that SME value added and SME employment in Poland would continue to grow by 11.4% and 1.5% respectively, but Russia's war of aggression against Ukraine will affect these estimates.	Estimates and forecasts produced by JRC, based on figures from the Structural Business Statistics Database, provisional data for 2020-2021 from the National Accounts Database and the Short-Term Business Statistics Database and forecasts from the AMECO database.
SMEs in Poland generated 50.0% of value added and 66.7% of employment in 2021, compared to 51.8% and 64.4%, respectively, in the EU as a whole.	Estimates produced by JRC, based on figures from the Structural Business Statistics Database as well as provisional data for 2020-2021 from the National Accounts Database and the Short-Term Business Statistics Database.
ENVIRONMENTAL ASPECTS OF SUSTAINABILITY  ENVIRONMENTAL ASPECTS OF SUSTAINABILITY	
Thanks to the loans from the European Investment Bank (EIB), Polish SMEs will be able to access additional financing for implementation of environmentally friendly solutions. In October 2021, the EIB loaned EUR 75 million to Bank Ochrony Środowiska and in July 2021 - EUR 200 million to BNP Paribas Leasing Services (at least 20% of which should be dedicated to climate-related solutions).	<p>Bank Ochrony Środowiska, Bank Ochrony Środowiska podpisał umowę pożyczki z Europejskim Bankiem Inwestycyjnym z przeznaczeniem dla małych i średnich przedsiębiorstw, na projekty służące ochronie klimatu, 2021. https://www.bosbank.pl/informacje-korporacyjne/centrum-prasowe/serwis-prasowy/informacje-prasowe/bank-ochrony-srodowiska-podpisał-umowe-pożyczki-z-europejskim-bankiem-inwestycyjnym-z-przeznaczeniem-dla-małych-i-średnich-przedsiębiorstw-na-projekty-służące-ochronie-klimatu</p> <p>InfoWire.pl., Europejski Bank Inwestycyjny i BNP Paribas Leasing Services razem dla MŚP i</p>



	<p>klimatu, 2021. https://infowire.pl/generic/release/683474/europejski-bank-inwestycyjny-i-bnp-paribas-leasing-services-razem-dla-msp-i-klimatu</p>
<p>According to a survey conducted in January-February 2021, only 2% of Polish SMEs are in possession of electric cars, with 11% having classic hybrid and 3% plug-in hybrid cars. Nearly one in four SME owners believe that maintenance of an electric car is more costly than that of a classic car or a hybrid. However, one in five has been considering a purchase of an electric car (21% is thinking about buying a plug-in hybrid and 33% of a classic hybrid).</p>	<p>Balkiewicz-Żerek, A. et al, Floty samochodów kluczem do elektromobilności, 2021. http://masterlease.pl/wp-content/uploads/2021-06-floty-samochodow-kluczem-do-elektromobilnosci-raport.pdf</p>
<p>The Institute of Renewable Energy estimates that as of the end of 2020 there were approximately 70 MW photovoltaic micro-installations that small and micro companies in Poland constructed to generate energy for their own needs.</p>	<p>Instytut Energii Odnawialnej, Rynek Fotowoltaiki w Polsce 2021, 2021. https://ieo.pl/pl/raport-rynek-fotowoltaiki-w-polsce-2021</p>
<p>As of 2021, Poland was one of the EU's five worst performers when it comes to environmental sustainability. While the country scores above average on the environment-related technologies, its overall performance is negatively affected by poor air quality (EU's third worst performer on the "air emissions by fine particulates" measure) and low resource productivity.</p>	<p>European Commission, European innovation scoreboard Poland country profile, 2021. https://ec.europa.eu/docsroom/documents/45930</p>
<p>Under the Fostering Effective Energy Transition Index 2021, Poland ranked 62nd out of 115 economies considered, with a score just below the global average (58% versus 59%).</p>	<p>World Economic Forum, Fostering Effective Energy Transition, 2021. https://www3.weforum.org/docs/WEF_Fostering_Effective_Energy_Transition_2021.pdf</p>
<p>Poland ranked 52nd among 64 economies analysed under the Climate Change Performance Index 2022. This is a decline by four spots compared to the previous edition of the report. The report criticises the policies related to coal-phase out and renewable energy, as well as insufficient progress in greening of the building sector. However, progress in implementation of the small photovoltaics programme has been noted (even as the talks on limiting the governmental support for the programme are under way).</p>	<p>Germanwatch, Climate Change Performance Index 2022, 2021, https://ccpi.org/country/pol/</p>
<p>In 2021, the proportions of SMEs that have taken resource-efficiency measures was lower (81%) than the EU average (89.3%). Only 13% of SMEs in Poland</p>	<p>European Commission, Eurobarometer on SMEs, resource efficiency and green markets, 2022.</p>

(compared to the EU average of 24%) have a concrete strategy in place to reduce their carbon footprint and become climate neutral or negative.	
SOCIAL ASPECTS OF SUSTAINABILITY	
In November 2021, the Ministry of Development Funds and Regional Policy initiated a series of online workshops for SMEs aimed at increasing their awareness regarding corporate social responsibility and sustainable development.	Ministerstwo Funduszy i Polityki Regionalnej, Społeczna odpowiedzialność biznesu – pomysł na rozwój przedsiębiorstw w czasie zmian , 2021. https://www.gov.pl/web/fundusze-regiony/spoleczna-odpowiedzialnosc-biznesu-pomysl-na-rozwoj-przedsiębiorstw-w-czasie-zmian
In 2020, there were 1.283 social and professional reintegration units: social integration centres (CIS), social integration clubs (KIS), vocational activity establishments (ZAZ), occupational therapy workshops (WTZ), i.e., 3,4 units per 100.000 inhabitants. They provided assistance to over 44,000 persons at risk of social inclusion (0,5% less than in 2019).	GUS – Statistics Poland, Social integration centres, social integration clubs, vocational activity establishments, occupational therapy workshops in 2020, 2021. https://stat.gov.pl/en/topics/social-economy/social-economy-third-sector/social-integration-centres-social-integration-clubs-vocational-activity-establishments-occupational-therapy-workshops-in-2020,6,9.html
Poland ranked 15 th out of 165 economies on the Sustainable Development Goals (SDG) Index with 80,2% of SDG achievement. At the same time, the country ranked 113 th on the spill over measure, with a score of 83,6 (out of 100). This indicates that more positive effects than negative side effects were observed from progress towards SDGs.	Cambridge University Press, The Decade of Action for the Sustainable Development Goals: Sustainable Development Report 2021, 2021. https://sdgindex.org/reports/sustainable-development-report-2021/
DIGITALISATION	
The latest edition of the Digital Economy and Society Index (DESI) – with data for 2020 - showed that Polish SMEs perform below the average on all four sub-indicators under the Business digitalisation indicator: i) electronic information sharing (7,93 out of 100 compared to the EU average of 9,56); ii) social media (4,69 out of 100 compared to the EU average of 8,39); iii) big data (7,97 out of 100 compared to the EU average of 12,4); and iv) cloud (4,44 out of 100 compared to the EU average of 11,9). Overall, on the Integration of digital technology in businesses' activities dimension, Poland ranked 24 th out of 27 EU MS.	The European Commission. Digital Economy and Society Index DESI, 2021. https://ec.europa.eu/newsroom/dae/redirecton/document/80495
In 2020, 98,3% of small and 99,6% of medium enterprises had access to internet and 67,3% and 88,6% respectively had a website (for large	Statistics Poland (GUS), Wykorzystanie technologii informacyjno-komunikacyjnych w jednostkach administracji publicznej, przedsiębiorstwach i gospodarstwach



companies those numbers stood at 99,9% and 92,5%). The majority of SMEs used the website to display their products and services as well as their prices. Only 12,2% of small and 15,6% of medium enterprises allowed their clients to purchase goods or book their services online.	domowych w 2020 roku, 2021. https://stat.gov.pl/download/gfx/portalinformacyjny/pl/defaultaktualnosci/5497/3/19/1/ict_w_przedsiębiorstwach_2020.xlsx
In 2020, 20,6% and small and 37,7% of medium enterprises purchased cloud computing services, predominantly in the form of e-mail and office software. 6.9% of small and 12,8% of medium companies were conducting big data analysis in-house or through outsourcing; the majority (93,1% and 85,7% respectively) were not considering usage of big data analysis in the future. 13,6% of small and 27,5% of medium enterprises were using Internet of Things.	Statistics Poland (GUS), Wykorzystanie technologii informacyjno-komunikacyjnych w jednostkach administracji publicznej, przedsiębiorstwach i gospodarstwach domowych w 2020 roku, 2021. https://stat.gov.pl/download/gfx/portalinformacyjny/pl/defaultaktualnosci/5497/3/19/1/ict_w_przedsiębiorstwach_2020.xlsx
As a spill-over from COVID-19 pandemic, in February/March 2021, 8% of SMEs became active on the internet, on social media or specialist platforms/apps, and 13% increased their presence as compared to September/October 2020. However, 33% of companies declared they have not been active online.	World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników III edycji Badania, 2021. https://www.parp.gov.pl/storage/publications/pdf/2021_07_bank_swiatowy.pdf
As a result of the pandemic, 68% of companies invested in new hardware or software between September/October 2020 and February/March 2021. Moreover, the share of online sales in total sales of SMEs increased from 12% to 14% between spring 2020 and winter 2021, as did the share of employees working online (up to 20% from 85).	The World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników III edycji Badania, https://www.parp.gov.pl/storage/publications/pdf/2021_07_bank_swiatowy.pdf
As of Q1 2021, the data stored in digital form by Polish SMEs included predominantly human resources data (63%) and financial data (52%). The number is lower for production data and information about deliveries and delivery companies (35% each).	World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników III edycji Badania, 2021. https://www.parp.gov.pl/storage/publications/pdf/2021_07_bank_swiatowy.pdf
INNOVATION 	
Poland performed relatively well in OECD's 2021 assessment of innovation skills, scoring above the OECD average on all five measures taken under consideration. Indeed, the country was ranked among top 5 performers on the complex problem solving and practical intelligence of innovation indicators.	OECD, OECD SME and entrepreneurship outlook 2021, 2021. https://www.oecd.org/industry/smes/SME-Outlook-2021-Country-profiles.pdf


Between September/October 2020 and February/March 2021, 31% of SMEs introduced some kind of innovations regarding the goods they sell or services their offer, and 23% introduced a completely new product or service.	World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników III edycji Badania, 2021.
With an overall score of 66 out of 180 points (relative to EU in base year), Poland remains in the "emerging innovators" group according to the European Innovation Scoreboard's 2021 edition, even if its performance improved slightly another year in a row. Particularly worrisome is the high share of "non-innovators without disposition to innovate" (61,3 compared to the EU average of 31,3).	European Commission, European innovation scoreboard. Poland country profile, 2021. https://ec.europa.eu/docsroom/documents/45930
SKILLS  SKILLS	
According to a survey conducted in March-April 2021, over half (56%) of SME owners consider finding and keeping employees the main challenge they are currently facing.	EFL Grupa Credit Agricole, Cyfrowa rewolucja na rynku leasingu, 2021. https://efl.pl/wp-content/uploads/2021/06/efl_cyfrowa_rewolu_cja.pdf
As of 2021, lack of skilled employees was perceived as an issue by 61,5% of micro and medium enterprises, and 63% of small enterprises.	PARP (Polish Agency for Enterprise Development), Raport o stanie sektora małych i średnich przedsiębiorstw w Polsce, 2021. https://www.parp.gov.pl/storage/publications/pdf/PARP-26_Raport-2021-07-22_WCAG_210726.pdf
49% of Polish SMEs did not offer any kind of training to their employees in 2021, predominantly because they believed the employees already possessed sufficient skills (63%), but also due to COVID-19 pandemic (30%).	World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników III edycji Badania, https://www.parp.gov.pl/storage/publications/pdf/Prezentacja-v7---FINAL.pdf
ADMINISTRATIVE BURDEN  ADMINISTRATIVE BURDEN	
Increasing employment costs continue to be an issue for the majority of entrepreneurs, in particular for medium enterprises. 94,5% of them believe that the costs of employing a person have increased in 2021 (for micro and small companies, this number stands at 82% and 87% respectively, compared to 78% for large companies).	PARP (Polish Agency for Enterprise Development), Raport o stanie sektora małych i średnich przedsiębiorstw w Polsce, 2021. https://www.parp.gov.pl/storage/publications/pdf/PARP-26_Raport-2021-07-22_WCAG_210726.pdf
Since 1 January 2022, the possibility to issue e-invoices has been introduced (i.e. electronic invoices with the so-called structured XML format). This solution will contribute to the improvement of conditions for taxpayers to conduct business activity by easier and faster access to documents. The changes are also aimed at tightening the tax system,	Government of Poland, Ustawa z dnia 29 października 2021 r. o zmianie ustawy o podatku od towarów i usług oraz niektórych innych ustaw, 2021. https://isap.sejm.gov.pl/isap.nsf/DocDetails.xsp?id=WDU20210002076


thereby reducing irregularities in VAT settlements.	
REGULATORY OBSTACLES  REGULATORY OBSTACLES	
According to a survey conducted in March-April 2021, over half (53%) of SME owners considers regulation and taxes as the main challenges they are currently facing.	EFL Grupa Credit Agricole, Cyfrowa rewolucja na rynku leasingu. Pod lupą, 2021. https://efl.pl/wp-content/uploads/2021/06/efl_cyfrowa_rewolucja.pdf
The ease of entry to the Polish market, as measured by market burdens and regulations, was assessed below the average in the 2020/2021 GEM report, with a score of 4,5 out of 10 and a 22 nd rank among 45 economies considered.	Global Entrepreneurship Monitor, Global Entrepreneurship Monitor 2020/2021 Global Report, 2021. https://www.gemconsortium.org/reports/latest-global-report
When it comes to the entrepreneurship regulatory framework, according to the 2021 OECD outlook, Poland is performing above the OECD average concerning simplification and evaluation of regulations, and strength of insolvency framework. At the same time, its performance was assessed as below OECD average when it comes to administrative burdens on start-ups, cost of resolving insolvency, and cost of starting a business.	OECD, OECD SME and entrepreneurship outlook 2021, 2021. https://www.oecd.org/industry/smes/SME-Outlook-2021-Country-profiles.pdf
ACCESS TO FINANCE  ACCESS TO FINANCE	
In 2021, 28% of micro, 25% of small and 11% of medium enterprises were concerned about losing financial liquidity, predominantly due to the COVID-19 pandemic, loss of clients, and late payments from the business partners (82%, 61% and 42% respectively, no disaggregation by the company size). Indeed, access to credit has deteriorated in March/April 2021 (compared to the previous six months) according to 61% of micro, 59% of small and 57% of medium size companies. This was a significant deterioration compared to the results of the previous editions of the study.	PARP (Polish Agency for Enterprise Development), Raport o stanie sektora małych i średnich przedsiębiorstw w Polsce, 2021. https://www.parp.gov.pl/storage/publications/pdf/PARP-26_Raport-2021-07-22_WCAG_210726.pdf
In February/March 2021, one in four (26%) of SMEs had enough cash to keep them going for up to 5 weeks, further 39% between 5 and 15 weeks, and 20% for between 15 and 40 weeks. Only 1 in 10 SMEs had enough cash to remain on the market for a year or more.	World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników III edycji, 2021. https://www.parp.gov.pl/storage/publications/pdf/2021_07_bank_swiatowy.pdf
SMEs faced numerous obstacles of technical, financial, and methodological nature when trying to apply for working capital financing available amid the	SMEs Ombudsman (Biuro Rzecznika Małych i Średnich Przedsiębiorców), Barriers and difficulties in the selection of applications for subsidies, grants for working capital, 2021.

COVID-19 pandemic. Among them were lack of appropriate digital application tools capable of servicing large numbers of applicants at the same time; divergent criteria imposed by various voivodship regions on applicants (for instance the decrease in revenue that made a SME eligible for help varied between 25% and 70% depending on the voivodships); as well as insufficient amount of funds made available compared to the needs expressed by the SMEs.	https://rzecznikmsp.gov.pl/wp-content/uploads/2021/09/Rzeczni-MSP_Raport_Bariery-i-utrudnienia-w-zakresie-naboru-wnioskow-na-dotacje-granty-na-kapital-obrotowy.pdf
On the "Access to entrepreneurial finance" measure of the GEM 2020/2021, Poland received 4,4 points (on a scale 0-10 where 10 indicates best performance), a decline compared to the previous edition of the report when it received 4,94.	Global Entrepreneurship Monitor, Global Entrepreneurship Monitor 2020/2021 Global Report, 2021. https://www.gemconsortium.org/reports/latest-global-report
In 2020, 24.93% of loan applications by SMEs were either rejected or unacceptable offers, compared to 7.54% for the EU-27 average.	European Commission and European Central Bank, Survey on Access to Finance of Enterprises (SAFE), 2020.
LATE PAYMENTS  LATE PAYMENTS	
In March/April 2021, 66% of micro, 65% of small and 62% of medium enterprises reported that they received payments from their business partners late compared to the previous six months (versus a reported 66,5% in case of large companies).	PARP (Polish Agency for Enterprise Development), Raport o stanie sektora małych i średnich przedsiębiorstw w Polsce, 2021. https://www.parp.gov.pl/storage/publications/pdf/PARP-26_Raport-2021-07-22_WCAG_210726.pdf
The value of debts of Polish companies (including SMEs) increased between Q1 and Q2 2020. Increase in due payments was a problem across nearly the entire economy, but in particular in trade by PLN 0,23 billion (EUR 50.38 million), as well as industry by PLN 0,12 billion (EUR 26.29 million), by construction PLN 0,14 billion (EUR 30.67 million) and by transport & warehousing PLN 0,1 billion (EUR 21.9 million).	Business perspectives, The impact of the COVID-19 pandemic on the due payments of Polish enterprises from selected industries, 2021 https://www.businessperspectives.org/index.php/journals/investment-management-and-financial-innovations/issue-381/the-impact-of-the-covid-19-pandemic-on-the-due-payments-of-polish-enterprises-from-selected-industries
ACCESS TO MARKETS  ACCESS TO MARKETS	
According to the latest available (2021) Eurostat data (as of 2018), the share in the value of imports of the Polish micro, small and medium companies stood at 8,4%, 12,9%, and 21% respectively, all below the EU averages of 10,6%, 14,3% and 21,4% respectively. The share of value of exports for micro companies amounted to 6,2%, small ones – 8,6%, and for medium	Eurostat, International trade in goods by enterprise size, 2021. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=International_trade_in_goods_by_enterprise_size&oldid=540742#Share_of_SMEs_in_total_trade_.28intra_.2B_extra-EU.29

enterprises – 18,2%. These values are below the EU averages of 7,1%, 10,0% and 20,4% respectively.	
As of 2019, approx. 2,9% of Polish SMEs were selling their products abroad and 0.95% were selling their services abroad. At the same time, 3,9% and 1,42% of companies were importing goods and services respectively. Least likely to trade with partners abroad are microenterprises. In 2019, exports of goods and services abroad generated 4,7%, 15,3% and 20% of income for micro, small, and medium enterprises respectively.	PARP (Polish Agency for Enterprise Development), Raport o stanie sektora małych i średnich przedsiębiorstw w Polsce, 2021. https://www.parp.gov.pl/storage/publications/pdf/PARP-26_Raport-2021-07-22_WCAG_210726.pdf
According to OECD 2021 outlook, 17,9% of Polish SMEs were exporters in long Global Value Chains (GVCs) and 16,8% were importers in long GVCs (data for 2015-2016). This was against the OECD averages of 29,1% and 29,7% respectively.	OECD, OECD SME and entrepreneurship outlook 2021, 2021. https://www.oecd.org/industry/smes/SME-Outlook-2021-Country-profiles.pdf
START-UP ENVIRONMENT  START-UP ENVIRONMENT	
Young companies in Poland (that have been on the market up to 5 years) have worse access to financing than more established firms.	World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników III edycji Badania, 2021. https://www.parp.gov.pl/storage/publications/pdf/2021_07_bank_swiatowy.pdf
Total early-stage Entrepreneurial Activity (GEM, 2021) stood at 3,1% (down from 5,4% in the previous edition of the report), placing Poland on 42 nd place out of 43 economies considered in the report.	Global Entrepreneurship Monitor, Global Entrepreneurship Monitor 2020/2021 Global Report, 2021. https://www.gemconsortium.org/reports/latest-global-report
Two Polish cities, Warsaw and Krakow, were included in the list of 100 top emerging start up ecosystems in the 2021 edition of The Global Startup Ecosystem Report (GSER). Warsaw, which ranked in a range of 41-50, performed well on the availability of funding (8 on a scale 10-1, where 10 indicates best performance) and talent (7), but was given lower scores on performance (3) and market reach (2). Krakow's scores were lower, with an overall rank in a range of 71-80 and low individual marks on market reach (4), talent (3), funding (2), and performance (1).	Startup Genome, Global Startup Ecosystem Report 2021, 2021. https://startupgenome.com/reports/gser2021 Startup Genome, Global Startup Ecosystem Report 2020, 2020. https://startupgenome.com/report/gser2020

SCALE-UP ENVIRONMENT		 SCALE-UP ENVIRONMENT
According to the latest available data by Eurostat, in 2018 the share of high-growth enterprises in Poland stood at 12,5%, the 9 th best score in the EU that year.	Eurostat, High growth enterprises (growth by 10% or more) and related employment by NACE Rev. 2, 2021. https://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=bd_9pm_r2&lang=en	
Poland ranked 39 th out of 43 economies considered in the GEM 2020/2021 on the High Growth Expectation Entrepreneurial Activity measure, with only 0,7% of nascent entrepreneurs or owner-managers of a new business aged 18-64 in the country expecting to employ six or more people in five years' time.	Global Entrepreneurship Monitor, Global Entrepreneurship Monitor 2020/2021 Global Report, 2021. https://www.gemconsortium.org/reports/latest-global-report	
IMPACT OF THE COVID-19 CRISIS		 IMPACT OF THE COVID-19 CRISIS
In February/March 2021 compared to the same period in 2020, 50% of SMEs reported decrease in sales, with an average decrease in sales of 16%. Micro companies were most affected by the COVID-19 crisis. By May/July 2021, on average, SMEs sales results nearly returned to the pre-pandemic levels.	World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników III edycji Badania, 2021. https://www.parp.gov.pl/storage/publications/pdf/2021_07_bank_swiatowy.pdf World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników IV edycji Badania, 2021. https://www.parp.gov.pl/storage/publications/pdf/Prezentacja-v7---FINAL.pdf	
The number of SMEs that already had or would be late with their payments in February/March 2021 amounted to 16%, an improvement by 10 percentage points compared to the first wave of the study in spring 2020. By May/July 2021, this number decreased to 5%.	World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników III edycji Badania, 2021. https://www.parp.gov.pl/storage/publications/pdf/2021_07_bank_swiatowy.pdf World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników IV edycji Badania, 2021. https://www.parp.gov.pl/storage/publications/pdf/Prezentacja-v7---FINAL.pdf	
In March/April 2021, SMEs perceived the economic situation in the country as worse than in February 2020, on average at 2,30, 2,38 and 2,43 points out of 5 for micro, small and medium enterprises respectively (where 1 = much worse and 5 = much better). This is compared to an average indication of 2,94 for large companies. At the same time, they were	PARP (Polish Agency for Enterprise Development), Raport o stanie sektora małych i średnich przedsiębiorstw w Polsce, 2021. https://www.parp.gov.pl/storage/publications/pdf/PARP-26_Raport-2021-07-22_WCAG_210726.pdf	

pessimistic regarding the situation in three months' time, expecting it will deteriorate further.	
23% of Polish SMEs received some form of governmental support between September/October 2020 and February/March 2021; most often in the form of cash transfers (78%) or payment deferrals (56%). Between February/March 2021 and May/July 2021, 18% received some kind of support. The majority (53%) of SMEs wished a larger help from the government, access to which should be faster (55%) and less complicated (58%). According to the entrepreneurs, information on the help schemes should be made more widely available. A preferable form of support for SMEs are financial transfers (70%), followed by delays of due payments (e.g. loans instalments or utility bills; 39%).	World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników III edycji Badania, 2021. https://www.parp.gov.pl/storage/publications/pdf/2021_07_bank_swiatowy.pdf World Bank & PARP (Polish Agency for Enterprise Development), Business Pulse Survey Polska: Podsumowanie wyników IV edycji Badania, 2021. https://www.parp.gov.pl/storage/publications/pdf/Prezentacja-v7---FINAL.pdf
Polish government extended COVID-19 assistance to SMEs under the Anti-crisis Shield 9.0, albeit on a smaller scale than in 2020. In 2021, entrepreneurs could have applied for exemption from social security contributions in selected months, job protection benefits, subsidy to cover the cost of running a business, and standstill benefits.	Serwis Rzeczypospolitej Polskiej, Polish Anti-crisis Shield – Support for companies, 2021. https://www.gov.pl/web/tarczaantykrzysowa/wyszukaj-wsparcie-dla-swojej-firmy
Nearly half (47,4%) of Poles know someone who had to stop their business as a result of the pandemic; at the same time, 12,8% know someone for whom the pandemic was an impulse to start a business.	Global Entrepreneurship Monitor, Global Entrepreneurship Monitor 2020/2021 Global Report, 2021. https://www.gemconsortium.org/reports/latest-global-report
NATIONAL RECOVERY AND RESILIENCE PLAN  NATIONAL RECOVERY AND RESILIENCE PLAN	
Poland's National Recovery and Resilience Plan (NRPP) has not been approved by the European Commission yet (as of the status in the early 2022).	European Commission, Przedstawicielstwo w Polsce, https://ec.europa.eu/poland/home_pl
The NRPP of Poland was submitted to the European Commission in 2021. Poland has requested EUR 36 billion in total: EUR 23,9 billion in grants and EUR 12,1 billion in loans.	Ministerstwo Funduszy i Polityki Regionalnej, Krajowy Plan Odbudowy i Zwiększania Odporności, 2021. https://www.gov.pl/attachment/2572ae63-c981-4ea9-a734-689c429985cf
Under the NRRP, Poland applied for: <ol style="list-style-type: none"> 1. EUR 4,455 billion in grants and EUR 245 million in loans for actions Component A "Resilience and competitiveness of the economy", 2. EUR 5,696 billion in grants and EUR 8,617 billion in loans under 	Ministerstwo Funduszy i Polityki Regionalnej, Krajowy Plan Odbudowy i Zwiększania Odporności, 2021. https://www.gov.pl/attachment/2572ae63-c981-4ea9-a734-689c429985cf

<p>Component B "Green energy and reducing of energy consumption"</p> <p>3. EUR 2,797 billion in grants and EUR 2,1 billion under Component C "Digital transition"</p> <p>4. EUR 4,092 million in grants and EUR 450 million in loans under Component D "Effectiveness, availability and quality of the health care system"</p> <p>5. EUR 6,818 billion in grants and EUR 700 million in loans under Component E "Green, intelligent mobility" Ministerstwo Funduszy i Polityki Regionalnej.</p>	
NATIONAL INDUSTRIAL ECOSYSTEMS *	
<p>The majority of Polish small enterprises (as of 2019) operated in trade sector (27,3%), manufacturing sector (24,1%), and construction sectors (13,1%). As for the medium enterprises, the majority operated in manufacturing (38,7%), trade (20,3%) and construction (7,6%).</p>	 NATIONAL INDUSTRIAL ECOSYSTEMS <p>GUS (Statistics Poland), (11.03.2021). Grupy przedsiębiorstw w Polsce w 2019 roku, https://stat.gov.pl/obszary-tematyczne/podmioty-gospodarcze-wyniki-finansowe/przedsiębiorstwa-niefinansowe/grupy-przedsiębiorstw-w-polsce-w-2019-roku,14,12.html</p>
<p>The gross profit margin of Polish enterprises during Q1-Q3 2021 went up from 4,8% compared to 5,7% during the same period of the previous year, gross profit ratio from 4,6% to 7,0% and net profit ratio from 3,7% to 5,8%. Greatest improvements in net profit ratio were recorded in, inter alia, accommodation and catering (from minus 3,4% to 6,1%), information and communication (from 8,3% to 17,7%), other service activities (from minus 0,9% to 3,1%), industrial processing (from 4,1% up to 6,1%), and in construction (from 4,7% to 6,0%).</p>	<p>GUS – Statistics Poland, Wyniki finansowe przedsiębiorstw niefinansowych w okresie styczeń-wrzesień 2021 roku, 2021. https://stat.gov.pl/obszary-tematyczne/podmioty-gospodarcze-wyniki-finansowe/przedsiębiorstwa-niefinansowe/wyniki-finansowe-przedsiębiorstw-niefinansowych-w-okresie-styczen-wrzesien-2021-roku,12,45.html</p>
<p>Polish space sector, heavily dominated by SMEs, has accelerated pace of its development since joining the European Space Agency as a full member in 2021 and creation of Polish Space Agency (POLSA) in 2014.</p> <p>As of 2021, SMEs constituted 78% of the members of the Polish Space Industry Association. Overall, entities that are association members employ approximately 6.000 persons and generate approx. PLN 1,8 million (EUR 394,000) revenue annually.</p> <p>Moreover, 111 Polish companies with a SME status are registered in the European Space Agency database, which constitute 3,5% of all SMEs registered in the database. Between 2014-2020, the</p>	<p>Polish Space Agency, Polish Space Sector Catalogue of Selected Entities, 2018. https://polsa.gov.pl/images/polski_sektor_kosmiczny_katalog_pl_eng/PODGLAD_PAK-KATALOG_EN_small.pdf</p> <p>Polish Space Industry Association, The Polish Space Industry Association Members Catalog, 2021. https://space.biz.pl/wp-content/uploads/2021/03/SpacePL_Katalog_EN_2021-pages.pdf</p> <p>European Space Agency, ESA-STAR Registration, 2021. https://esastar-</p>

value of contracts acquired by the Polish entities from ESA totalled EUR 94,2 million.	emr.sso.esa.int/PublicEntityDir/PublicEntityDirSme
<div> OTHER RELEVANT TOPICS  OTHER RELEVANT TOPICS </div>	
High inflation in Poland has been a real issue. Already in October 2021 it amounted to 6,8% year-on-year.	GUS - Statistics Poland, Szybki szacunek wskaźnika cen towarów i usług konsumpcyjnych w październiku 2021 roku, 2021. https://stat.gov.pl/obszary-tematyczne/ceny-handel/wskazniki-cen/szybki-szacunek-wskaznika-cen-towarow-i-uslug-konsumpcyjnych-w-pazdzierniku-2021-roku,8,66.html
Already in March/April 2021, the vast majority of companies argued that the prices of goods, materials and services necessary to conduct their business have increased (88% of micro, 90,5% of small, and 93,5% of medium companies).	PARP (Polish Agency for Enterprise Development), Raport o stanie sektora małych i średnich przedsiębiorstw w Polsce, 2021. https://www.parp.gov.pl/storage/publications/pdf/PARP-26_Raport-2021-07-22_WCAG_210726.pdf

* "National industrial ecosystems" refer to the national aspects of the industrial ecosystems as defined by the EC.

<https://op.europa.eu/en/publication-detail/-/publication/6355326c-ae95-11eb-9767-01aa75ed71a1/language-en>