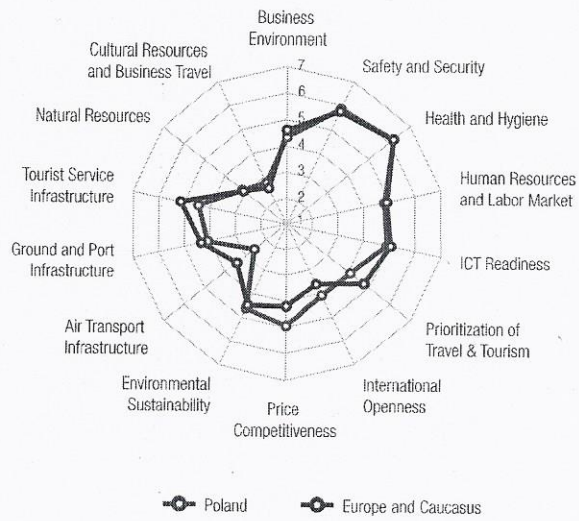


# Poland

## The Travel & Tourism Competitiveness Index

Rank (out of 141)    Score (1-7)

<b>Travel &amp; Tourism Competitiveness Index</b> .....	<b>47</b> .....	<b>4.08</b>
<b>Enabling Environment</b> .....	<b>39</b> .....	<b>5.22</b>
Business Environment.....	76.....	4.35
Safety and Security.....	35.....	5.86
Health and Hygiene.....	25.....	6.21
Human Resources and Labour Market.....	41.....	4.80
ICT Readiness.....	44.....	4.90
<b>T&amp;T Policy and Enabling Conditions</b> .....	<b>23</b> .....	<b>4.43</b>
Prioritization of Travel & Tourism.....	99.....	4.10
International Openness.....	26.....	4.08
Price Competitiveness.....	46.....	4.94
Environmental Sustainability.....	28.....	4.62
<b>Infrastructure</b> .....	<b>62</b> .....	<b>3.70</b>
Air Transport Infrastructure.....	73.....	2.57
Ground and Port Infrastructure.....	47.....	4.08
Tourist Service Infrastructure.....	66.....	4.44
<b>Natural and Cultural Resources</b> .....	<b>43</b> .....	<b>2.96</b>
Natural Resources.....	57.....	3.14
Cultural Resources and Business Travel.....	35.....	2.77



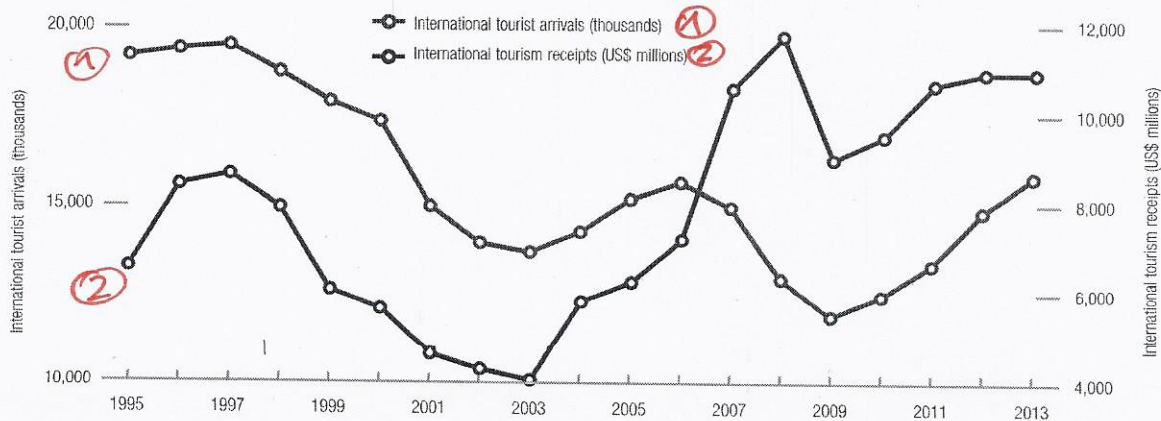
## Travel & Tourism Key Indicators and Economic Impact

Int'l tourist arrivals (thousands), 2013.....	15,800
Int'l tourism receipts (inbound US\$ millions), 2013.....	10,938.0
Growth (%) in int'l outbound travel spending*.....	n/a
Average spending per int'l tourist (US\$), 2013.....	692.3

Population (millions), 2013.....	38.5
Surface area (1,000 square kilometres), 2013.....	312.7
Gross domestic product per capita (PPP\$), 2013.....	23,273
Real GDP growth (%), 2013.....	1.6

T&T industry economic impact, 2014 estimates	Absolute value	Percent of total	Growth forecast
T&T industry GDP (US\$ millions).....	10,938.6	2.1	5.2
T&T industry employment (1,000 jobs).....	334.1	2.2	3.2

## Evolution of the T&T Industry Over Time



Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 67.  
\* CAGR 2008-2013.

## The Travel &amp; Tourism Competitiveness Index in detail

INDICATOR	VALUE	RANK/141	INDICATOR	VALUE	RANK/141
<b>Business Environment</b> .....	<b>4.3</b> .....	<b>76</b>	<b>International Openness</b> .....	<b>4.1</b> .....	<b>26</b>
1.01 Property rights <sup>†</sup> .....	4.3.....	55	7.01 Visa requirements (0–100 best)*.....	23.0.....	72
1.02 Impact of rules on FDI <sup>†</sup> .....	4.4.....	76	7.02 Openness of bilateral ASA (0–38)*.....	11.1.....	65
1.03 Efficiency of legal framework settling disputes <sup>†</sup> .....	2.9.....	117	7.03 No. of regional trade agreements in force*.....	46.0.....	1
1.04 Efficiency of legal framework challenging regs. <sup>†</sup> .....	2.8.....	110			
1.05 No. of days to deal with construction permits <sup>†</sup> .....	212.....	111	<b>Price Competitiveness</b> .....	<b>4.9</b> .....	<b>46</b>
1.06 Construction permits cost (%) <sup>*</sup> .....	0.3.....	11	8.01 Ticket taxes, airport charges (0–100 best)*.....	87.9.....	27
1.07 Extent of market dominance <sup>†</sup> .....	4.8.....	19	8.02 Hotel price index (US\$)*.....	79.9.....	4
1.08 No. of days to start a business*.....	30.....	112	8.03 Purchasing power parity*.....	0.6.....	81
1.09 Cost to start a business (% GNI/capita)*.....	12.9.....	86	8.04 Fuel price levels (US\$ cents/litre)*.....	174.0.....	100
1.10 Effect of taxation on incentives to work <sup>†</sup> .....	3.4.....	86			
1.11 Effect of taxation on incentives to invest <sup>†</sup> .....	3.3.....	101	<b>Environmental Sustainability</b> .....	<b>4.6</b> .....	<b>28</b>
1.12 Total tax rate (% profit)*.....	38.7.....	72	9.01 Stringency of environmental regulations <sup>†</sup> .....	4.6.....	44
1.12a Labour and contributions tax rate (% profit)*.....	24.7.....	110	9.02 Enforcement of environmental regulations <sup>†</sup> .....	4.1.....	56
1.12b Profit tax rate (% profit)*.....	13.1.....	52	9.03 Sustainability of T&T development <sup>†</sup> .....	3.7.....	112
1.12c Other taxes rate (% profit)*.....	1.0.....	37	9.04 Particulate matter (2.5) concentration (µg/m <sup>3</sup> ).....	15.7.....	130
			9.05 No. of envtl. treaty ratifications (0–27 best)*.....	24.....	4
<b>Safety and Security</b> .....	<b>5.9</b> .....	<b>35</b>	9.06 Baseline water stress (0–5 worst)*.....	1.3.....	60
2.01 Business costs of crime and violence <sup>†</sup> .....	5.4.....	27	9.07 Threatened species (% total species)*.....	3.3.....	36
2.02 Reliability of police services <sup>†</sup> .....	4.1.....	76	9.08 Forest cover change (% average per year)*.....	–0.5.....	27
2.03 Business costs of terrorism <sup>†</sup> .....	6.0.....	27	9.09 Wastewater treatment (%) *.....	60.7.....	32
2.04 Index of terrorism incidence*.....	7.0.....	1	9.10 Coastal shelf fishing pressure (tonnes per km <sup>2</sup> )*.....	0.1.....	40
2.05 Homicide rate*.....	1.....	30			
			<b>Air Transport Infrastructure</b> .....	<b>2.6</b> .....	<b>73</b>
<b>Health and Hygiene</b> .....	<b>6.2</b> .....	<b>25</b>	10.01 Quality of air transport infrastructure <sup>†</sup> .....	4.0.....	86
3.01 Physician density per 1,000 pop.*.....	2.2.....	52	10.02 Airline dom. seat kms per week (millions)*.....	12.1.....	48
3.02 Access to improved sanitation (% pop.)*.....	89.0.....	73	10.03 Airline int'l. seat kms per week (millions)*.....	339.5.....	50
3.03 Access to improved drinking water (% pop.)*.....	100.0.....	1	10.04 Departures per 1,000 pop.*.....	2.0.....	83
3.04 Hospital beds per 10,000 pop.....	65.0.....	11	10.05 Airport density per million urban pop.*.....	0.6.....	109
3.05 HIV prevalence (% pop.)*.....	0.1.....	11	10.06 No. of operating airlines*.....	60.0.....	39
3.06 Malaria incidence per 100,000 pop.*.....	M.F.....	n/a			
			<b>Ground and Port Infrastructure</b> .....	<b>4.1</b> .....	<b>47</b>
<b>Human Resources and Labour Market</b> .....	<b>4.8</b> .....	<b>41</b>	11.01 Quality of roads.....	3.5.....	89
<i>Qualification of the labour force</i> .....	<i>5.6</i> .....	<i>40</i>	11.02 Quality of railroad infrastructure.....	2.9.....	54
4.01 Primary education enrolment rate (%)*.....	96.6.....	49	11.03 Quality of port infrastructure <sup>†</sup> .....	4.0.....	78
4.02 Secondary education enrolment rate (%)*.....	97.7.....	43	11.04 Quality of ground transport network <sup>†</sup> .....	4.5.....	65
4.03 Extent of staff training <sup>†</sup> .....	4.0.....	72	11.05 Railroad density (km/surface area)*.....	6.3.....	10
4.04 Treatment of customers <sup>†</sup> .....	4.9.....	49	11.06 Road density (km/surface area)*.....	Ⓢ.....	28
<i>Labour market</i> .....	<i>4.0</i> .....	<i>68</i>	11.07 Paved road density (km/surface area)*.....	Ⓢ.....	27
4.05 Hiring and firing practices <sup>†</sup> .....	3.4.....	109			
4.06 Ease of finding skilled employees <sup>†</sup> .....	4.0.....	61	<b>Tourist Service Infrastructure</b> .....	<b>4.4</b> .....	<b>66</b>
4.07 Ease of hiring foreign labour <sup>†</sup> .....	3.8.....	93	12.01 Hotel rooms per 100 pop.*.....	0.3.....	75
4.08 Pay and productivity <sup>†</sup> .....	4.1.....	52	12.02 Extension of business trips recommended <sup>†</sup> .....	3.8.....	135
4.09 Female labour force participation (% to men)*.....	0.8.....	68	12.03 Presence of major car rental companies <sup>†</sup> .....	6.....	35
			12.04 ATMs accepting Visa cards per million pop.*.....	837.6.....	26
<b>ICT Readiness</b> .....	<b>4.9</b> .....	<b>44</b>	<b>Natural Resources</b> .....	<b>3.1</b> .....	<b>57</b>
5.01 ICT use for B2B transactions <sup>†</sup> .....	4.3.....	97	13.01 No. of World Heritage natural sites*.....	1.....	43
5.02 Internet use for B2C transactions <sup>†</sup> .....	4.9.....	51	13.02 Total known species*.....	398.....	100
5.03 Individuals using internet (%)*.....	62.8.....	47	13.03 Total protected areas (% total territorial area)*.....	34.8.....	11
5.04 Broadband internet subs. per 100 pop.*.....	15.7.....	45	13.04 Natural tourism digital demand (0–100 best)*.....	14.....	67
5.05 Mobile telephone subs. per 100 pop.*.....	149.1.....	24	13.05 Quality of the natural environment <sup>†</sup> .....	4.5.....	68
5.06 Mobile broadband subs. per 100 pop.*.....	54.9.....	38			
5.07 Mobile network coverage (% pop.)*.....	99.5.....	58	<b>Cultural Resources and Business Travel</b> .....	<b>2.8</b> .....	<b>35</b>
5.08 Quality of electricity supply.....	5.5.....	46	14.01 No. of World Heritage cultural sites*.....	13.....	15
			14.02 No. of oral and intangible cultural expressions*.....	0.....	89
<b>Prioritization of Travel &amp; Tourism</b> .....	<b>4.1</b> .....	<b>99</b>	14.03 No. of large sports stadiums*.....	13.0.....	32
6.01 Government prioritization of T&T industry <sup>†</sup> .....	3.7.....	132	14.04 No. of international association meetings*.....	179.7.....	22
6.02 T&T gov't expenditure (% gov't budget)*.....	2.7.....	88	14.05 Cut./entert. tourism digital demand (0–100 best)*.....	13.....	46
6.03 Effectiveness of marketing to attract tourists <sup>†</sup> .....	3.9.....	108			
6.04 Comprehensiveness of T&T data (0–120 best)*.....	102.0.....	10			
6.05 Timeliness of T&T data (0–21 best)*.....	12.0.....	94			
6.06 Country Brand Strategy rating (1–10 best)*.....	69.1.....	62			

Notes: Ranks of notable competitive advantages are highlighted in blue. A legend for the symbols Ⓢ, † and \* is provided in the section "How to Read the Country/Economy Profiles" on page 67.

Table 1: The Travel &amp; Tourism Competitiveness Index 2015 Ranking

Rank	Country/Economy	Value	Rank	Country/Economy	Value
1	Spain	5.31	72	Israel	3.66
2	France	5.24	73	Uruguay	3.65
3	Germany	5.22	74	Philippines	3.63
4	United States	5.12	75	Vietnam	3.60
5	United Kingdom	5.12	76	Jamaica	3.59
6	Switzerland	4.99	77	Jordan	3.59
7	Australia	4.98	78	Kenya	3.58
8	Italy	4.98	79	Tunisia	3.54
9	Japan	4.94	80	Guatemala	3.51
10	Canada	4.92	81	Dominican Republic	3.50
11	Singapore	4.86	82	Macedonia, FYR	3.50
12	Austria	4.82	83	Egypt	3.49
13	Hong Kong SAR	4.68	84	Azerbaijan	3.48
14	Netherlands	4.67	85	Kazakhstan	3.48
15	Portugal	4.64	86	Cape Verde	3.46
16	New Zealand	4.64	87	Bhutan	3.44
17	China	4.54	88	Botswana	3.42
18	Iceland	4.54	89	Armenia	3.42
19	Ireland	4.53	90	Honduras	3.41
20	Norway	4.52	91	El Salvador	3.41
21	Belgium	4.51	92	Nicaragua	3.37
22	Finland	4.47	93	Tanzania	3.35
23	Sweden	4.45	94	Lebanon	3.35
24	United Arab Emirates	4.43	95	Serbia	3.34
25	Malaysia	4.41	96	Lao PDR	3.33
26	Luxembourg	4.38	97	Iran, Islamic Rep.	3.32
27	Denmark	4.38	98	Rwanda	3.32
28	Brazil	4.37	99	Mongolia	3.31
29	Korea, Rep.	4.37	100	Bolivia	3.29
30	Mexico	4.36	101	Suriname	3.28
31	Greece	4.36	102	Nepal	3.27
32	Taiwan, China	4.35	103	Kuwait	3.26
33	Croatia	4.30	104	Guyana	3.26
34	Panama	4.28	105	Cambodia	3.24
35	Thailand	4.26	106	Albania	3.22
36	Cyprus	4.25	107	Zambia	3.22
37	Czech Republic	4.22	108	Swaziland	3.20
38	Estonia	4.22	109	Gambia, The	3.20
39	Slovenia	4.17	110	Venezuela	3.18
40	Malta	4.16	111	Moldova	3.16
41	Hungary	4.14	112	Senegal	3.14
42	Costa Rica	4.10	113	Paraguay	3.11
43	Qatar	4.09	114	Uganda	3.11
44	Turkey	4.08	115	Zimbabwe	3.09
45	Russian Federation	4.08	116	Kyrgyz Republic	3.08
46	Barbados	4.08	117	Côte d'Ivoire	3.05
47	Poland	4.08	118	Ethiopia	3.03
48	South Africa	4.08	119	Tajikistan	3.03
49	Bulgaria	4.05	120	Ghana	3.01
50	Indonesia	4.04	121	Madagascar	2.99
51	Chile	4.04	122	Cameroon	2.95
52	India	4.02	123	Algeria	2.93
53	Latvia	4.01	124	Gabon	2.92
54	Seychelles	4.00	125	Pakistan	2.92
55	Puerto Rico	3.91	126	Malawi	2.90
56	Mauritius	3.90	127	Bangladesh	2.90
57	Argentina	3.90	128	Mali	2.87
58	Peru	3.88	129	Lesotho	2.82
59	Lithuania	3.88	130	Mozambique	2.81
60	Bahrain	3.85	131	Nigeria	2.79
61	Slovak Republic	3.84	132	Sierra Leone	2.77
62	Morocco	3.81	133	Haiti	2.75
63	Sri Lanka	3.80	134	Myanmar	2.72
64	Saudi Arabia	3.80	135	Burundi	2.70
65	Oman	3.79	136	Burkina Faso	2.67
66	Romania	3.78	137	Mauritania	2.64
67	Montenegro	3.75	138	Yemen	2.62
68	Colombia	3.73	139	Angola	2.60
69	Trinidad and Tobago	3.71	140	Guinea	2.58
70	Namibia	3.69	141	Chad	2.43
71	Georgia	3.68			

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Sope Williams-Elegbe, Associate Director & Head of Research

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