

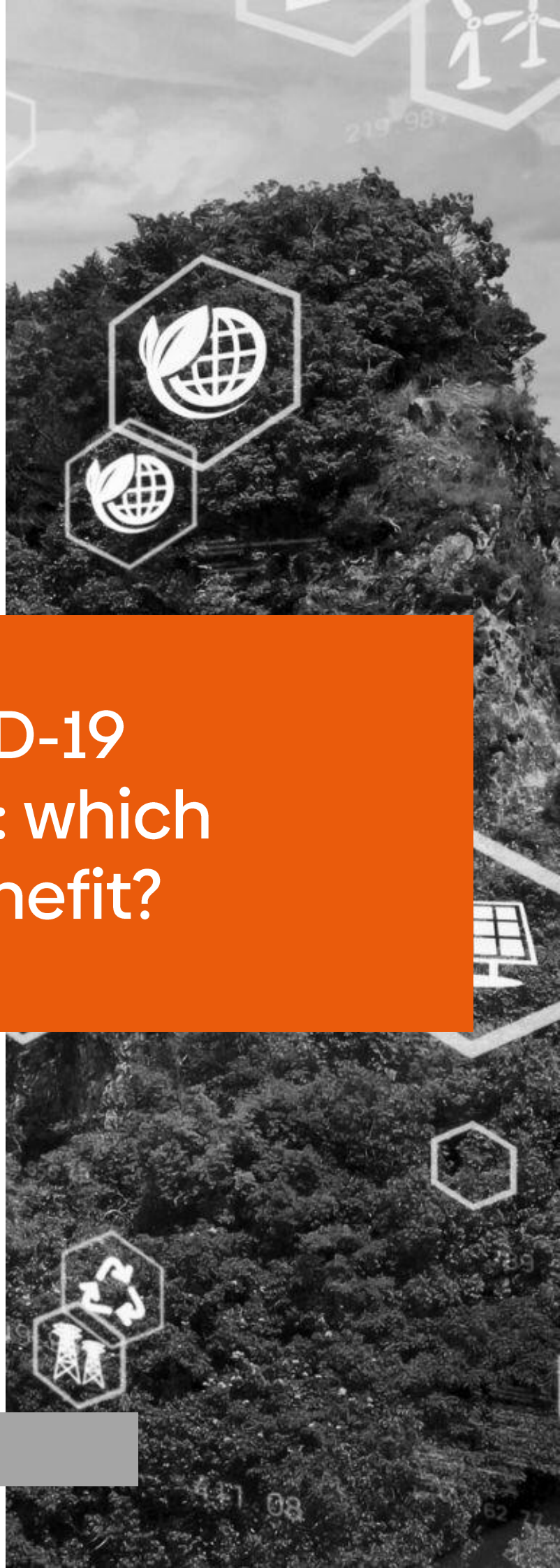
JDP

Newsletter

Poland's COVID-19 Recovery Plan: which sectors will benefit?

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The Recovery and Resilience Plan

On 8 December 2023, the Council approved the revised Poland's Recovery and Resilience Plan (*Krajowy Plan Odbudowy i Zwiększania Odporności*, "RRP"). The disbursement of most of the funds (EUR 55 billion) depends on the fulfilment of the so-called milestones, the most important of which relate to the rule of law.

Poland is to receive a total of EUR 59.82 billion (PLN 261.4 billion), of which EUR 25.3 billion (PLN 110.4 billion) will be in the form of **grants** and EUR 34.5 billion (PLN 151 billion) in the form of **low-interest loans**.

EUR 5 billion in pre-financing from the REPowerEU Plan was already disbursed to Poland at the turn of the year.

On 15 December 2023, Poland applied to the European Commission for the disbursement of the **first tranche of EUR 7 billion**, which is to be invested in areas such as legal reliefs for enterprises, improving innovation and digitalisation of enterprises, reliefs for medical students, more efficient management of Maluch+ funds, increasing road safety and the implementation of the social economy regulations. The funds are expected to be disbursed in **April 2024**.

The recovery plan consists of 54 investments and 48 reforms. They are intended to boost the reconstruction of the development potential of the economy lost due to the COVID-19 pandemic, strengthen competitiveness and improve the standard of living. Each EU member state is implementing its own investment and reform programme approved by the European Commission.

The RRP comprises six main components in which investments are planned:

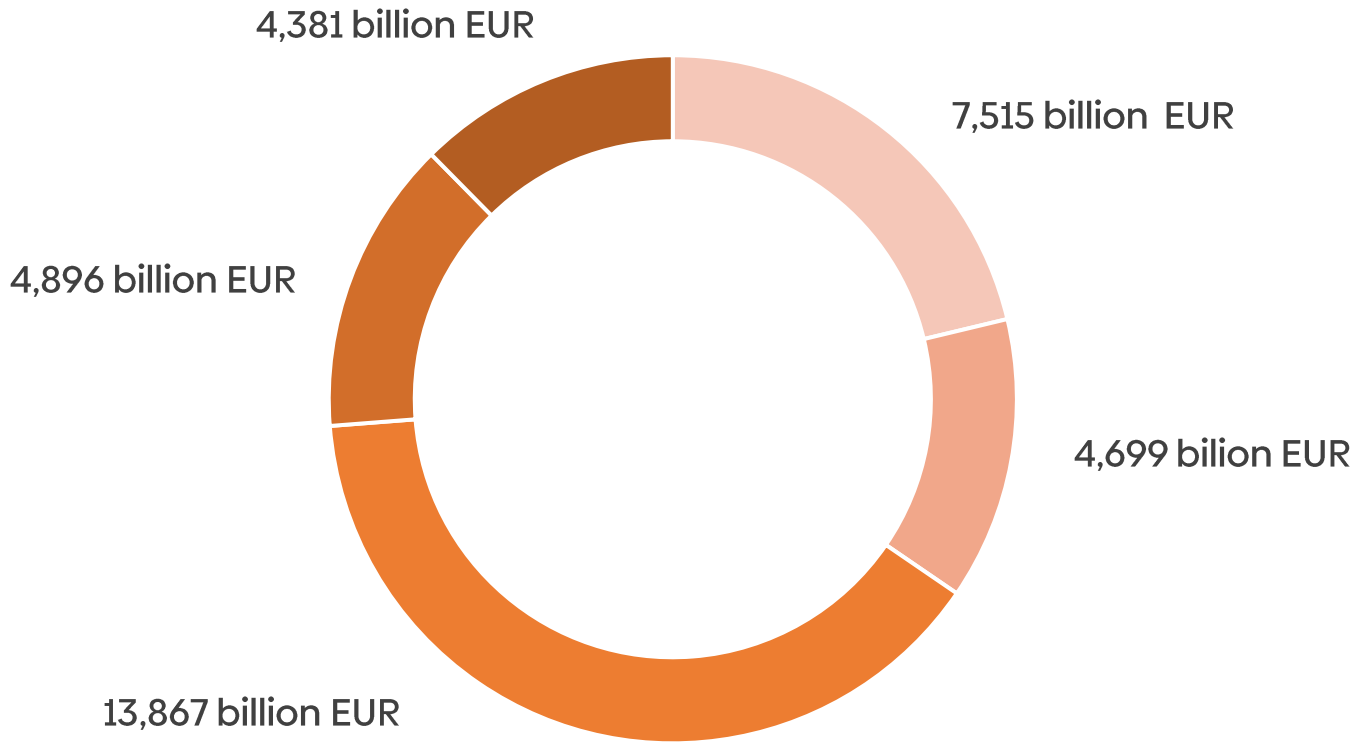
- resilience and competitiveness of the economy
- green energy and energy-intensity reduction
- digital transformation
- effectiveness, accessibility and quality of the health system
- green, smart mobility
- improving the quality of institutions and the conditions for the implementation of the RRP

In the table below, we present the most important, in our opinion, sectors and projects that will benefit from the RRP.

! In some areas, public aid for enterprises is available, which makes these areas particularly noteworthy.



RRP's structure



GREEN ENERGY,
MOBILITY



GREEN ENERGY, REDUCING
ENERGY CONSUMPTION



COMPETITIVENESS OF
THE ECONOMY



DIGITALISATION



HEALTH SYSTEM



A. Energy

Sector	Measure	Objective	Implementation	Value	Link / Page in RRP Annex to the RRP proposal
Energy	Energy Support Fund	<ul style="list-style-type: none"> Better access to financing for companies that directly bear the costs of the energy transition Managed by Bank Gospodarstwa Krajowego (Polish Development Bank, BGK) 	3Q 2026 (No proposal)	17.069 billion EUR	p. 215
	Offshore Wind Energy Fund	<ul style="list-style-type: none"> Projects involving the construction of offshore wind farms Managed by BGK 	3Q 2026 (No proposal)	4.785 billion EUR	p. 217
	Improving gas infrastructure	<ul style="list-style-type: none"> Improving energy infrastructure and facilities Security of supply needs for gas, including liquified natural gas Diversification of supply 	3Q 2026 (No proposal)	0.631 billion EUR	p. 219
	Energy storage systems	<ul style="list-style-type: none"> Support for large-scale energy storage (BESS) with a capacity of 0.9 GWh (4-5 h operating time) Modernisation of a 135 MW pumped-storage power plant 	2Q 2026 (No proposal)	0.2 billion EUR	p. 219
	Replacing heat sources and boosting energy efficiency	<ul style="list-style-type: none"> Reducing the dependence on fossil fuels Accelerating home renovations Phasing out fossil fuels in heating Reducing energy poverty 	Q4 2024 (e.g. "Clean Air" programme)	3.101 billion EUR (grant)	p. 215

	Local energy communities	<ul style="list-style-type: none"> Improving the regulatory environment for energy communities Improving the role of citizens, business and local authorities in the country's energy transition 	Q2 2024 (Proposal adopted)	0.189 billion EUR	p. 198 Amendment to the RES Act
	Improving capacity for RES connections	Regulations for accelerated integration of RES in DSO distribution networks	Q1 2025 (Proposal adopted)	None	p. 198 Amendments to the Energy Act, e.g. regarding cable pooling Energy Act
	Developing transmission networks (220 and 440 kV)	<ul style="list-style-type: none"> Developing 400 kV and 220kV transmission lines Construction or modernisation of relevant stations New Central Energy Market Information System (CSIRE) with a power quality analyser system Digitalisation of the electricity infrastructure 	Q2 2026 (Proposal adopted)	0.6 billion EUR	p. 201 Amendments to the Energy Act, e.g. regarding CSIRE and OIRE Energy Act
	Developing electricity distribution networks in rural areas	<ul style="list-style-type: none"> Construction or modernisation of 880 km of distribution networks, including Necessary stations Integrating smart grid functionalities 	Q2 2026 (No proposal)	0.9 billion EUR	p. 201
	Developing sustainable transport	Preparation of an action plan for sustainable transport in Poland in line with EU climate goals	Q3 2025 (Proposed strategy for the sustainable development of transport by 2030)	0.175 billion EUR	p. 201 Strategy
	Energy / Bus production	Zero-emission collective transport (buses)	Purchasing 1159 zero-emission electric buses	Q2 2026 (Proposal: National Fund for the Protection of the Environment and Water Management)	1.2 billion PLN (around 280 million EUR)



B. Infrastructure

Sector	Investment	Objective	Public aid	Value	Link / Page in RRP RRP version June 22 (PL)
Building Construction Public Facilities	B1.1.2. Replacement of heat sources and boosting energy efficiency in residential buildings	Thermal modernisation in residential buildings	Generally, none, as support for natural persons falls within non-commercial objectives BUT: Financing of investments possible under EU law	3.2 billion EUR	Link RRP p. 200-202
	D2.1.1. Modernisation and retrofitting of teaching facilities with a view to increasing admission limits for medical studies	Modernisation of the medical faculty's facilities	None	700 million EUR	RRP p. 294
	A4.2.1. Support for childcare facilities for children up to three years of age (nurseries, children's clubs) under Maluch+	Construction or renovation of childcare facilities	None	380.92 million EUR	Link RRP p. 158-159
	A1.2.2. Preparation of real properties for investments of key importance for the economy	Construction of production and warehouse facilities for industry and services	Regional investment aid in accordance with the GBER/regional area maps; real property price to be reduced by the value of the support granted under the RRP	299.93 million EUR	Link RRP p. 120-121
	B1.1.3. Replacement of heat sources and boosting energy efficiency in schools	Thermal modernisation of buildings in educational institutions	Generally, none	289.94 million EUR	RRP p. 202-203
	B1.1.4. Strengthening the energy efficiency of local social activity facilities	Thermal modernisation of libraries and community centres	None	66.99 million EUR	RRP p. 203-204

	B3.5.1. Investment in energy-efficient housing for low- and average-income households	Construction of residential units by local authorities	None	755.00 million EUR	Link RRP p. 410-414
	D1.1.1. Development and modernisation of the infrastructure of highly specialised care centres and other healthcare providers	Improving the efficiency of the operation of highly specialised care centres and other healthcare facilities by significantly improving the condition of their infrastructure	None	2.119 billion EUR	RRP p. 283
	D1.2.1. Development and modernisation of healthcare facilities at district level	Reconstruction, development and construction of new infrastructure for medical facilities	Support for units that provide services from public funds	150 million EUR	Link RRP p. 443
Hydraulic engineering	B2.2.3. Construction of offshore terminal infrastructure	Construction of a deep-water installation terminal with two installation units for offshore wind farms	Under the exemption regulation or individual registration obligation	436.90 million EUR	Link RRP p. 214-215
Railway	E2.1.1. Railways lines	Improving the railway infrastructure (linear and point-to-point)	None	2.39 billion EUR	Link RRP p. 328-331
	E2.1.3. Intermodal projects	Construction, expansion and modernisation of transshipment terminals, railway stations, public tracks for access to intermodal terminals, sidings to terminals and sidings at terminals	State aid SA.48093 (2017/N) - Poland - Aid for intermodal transport projects under the Operational Programme Infrastructure and Environment 2014-2020 or the programme for the period 2021-2027	174.96 million EUR	Link RRP p. 332-334
Buses	E.1.1.2. Zero-emission and low-emission public transport (buses)	Developing the charging/fuelling infrastructure for alternative fuels	Potentially, aid under Regulation 1370/2007 or 651/2014 or aid regulation to promote the charging and refuelling infrastructure for electric vehicles Charging infrastructure for electric vehicles and hydrogen fuelling stations	1.13 billion EUR	Link RRP p. 323-325

Wastewater disposal systems	B3.1.1. Investments in sustainable water and waste water management in rural areas	Increasing the availability of water and sewerage infrastructure	None	203.95 million EUR	RRP p. 217-218
Road infrastructure	E2.2.1. Transport safety investments	Construction of bypasses within national roads	None	699.84 million EUR	RRP p. 335-336
Tele-communication	C1.1.1. Ensuring access to very high-speed internet in white spots	Provision of a modern telecommunications infrastructure throughout the country	Community rules on state aid for the development of broadband networks	1.19 billion EUR	RRP p. 232-235
Satellites	A2.6.1. Development of the national system of monitoring services, products, analytical tools, services and accompanying infrastructure using satellite data	Development of necessary infrastructure: the National Satellite Information System (NSIS) that is to provide monitoring services using data from satellite Earth Observation (EO)	None	150 million EUR	Link RRP p. 367-368



C. Robotisation and digitalisation

Sector	Investment	Objective	Public aid	Value	Link / Page in RRP RRP version June 22 (PL)
Robotics New Tech Mechanical Engineering IT	A2.1.1 Investments supporting robotisation and digitalisation in enterprises	<ul style="list-style-type: none"> Appropriate level of digitalisation and robotisation in enterprises Increasing productivity Improving health and safety conditions Transformation towards Industry 4.0 	Public aid for entrepreneurs	450 million EUR	p. 132
IT Tele-communication	C1.1.1 Ensuring access to very high-speed internet in white spots	Access to very high-speed internet in white spots	Aid under Community rules on aid for the development of broadband networks for enterprises	1.2 billion EUR	p. 232

<p>IT Tele-communication</p>	<p>C2.1.1. Public e-services, IT solutions improving the functioning of administrations and the economy, and innovative technologies in the public sector, the economy and society</p>		<p>Aid may be provided</p> <ul style="list-style-type: none"> for innovative technologies according to GBER Projects involving digitalisation of agriculture, e.g. innovative technologies (e.g. relating to the supply chain, product originality, data collection and processing, internet of things) And are granted in accordance with EU regulations 	<p>420 million EUR</p>	<p>p. 238</p>
<p>IT</p>	<p>C3.1.1. Cybersecurity – CyberPL</p>	<ul style="list-style-type: none"> Strengthening the cyber resilience of information systems (IT and OT) used in units that are part of the national cybersecurity system Optimisation of the data processing infrastructure Optimisation of the infrastructure of government units Security and implementation of innovative next generation cloud solutions 	<p>Aid in accordance with Regulation (EU) 651/2014 and Regulation EU 1407/2013 (de minimis)</p> <p>In the cyber security component (CyberPL), aid recipients are service operators and digital service providers (enterprises, including SMEs).</p>	<p>443 million EUR</p>	<p>p. 252 ff.</p>
	<p>E2.2.2. Digitalisation of transport</p>	<ul style="list-style-type: none"> Modernisation of the transport system and introduction of new digital solutions such as <ul style="list-style-type: none"> ticket systems dynamic passenger information systems European Train Control System (ETCS) 	<p>Purchase and installation of ETCSs - open competition</p>	<p>341 million EUR</p>	<p>p. 337</p>



D. Circular Economy

Sector	Investment	Objective	Public aid	Value	Link / Page in RRP
Waste Technology	A2.2.1. Investments in the deployment of environmental technologies and innovation, including those related to circular economy	<ul style="list-style-type: none"> Enterprise transformation toward the circular economy Support for projects in line with EU (CEAP 2020) and national regulations ("Roadmap towards the Transition to the Circular Economy") 	State aid in accordance with the Guidelines on State aid for environmental protection and energy 2014-2020, the GBER and de minimis rules	162 million EUR	RRP version June 22 (PL) p. 134



E. Food industry

Sector	Investment	Objective	Public aid	Value	Link / Page in RRP
Mechanical Engineering FMCG Food Industry Agriculture IT Logistics Construction	A1.4.1. Investments to diversify and shorten the supply chain of agricultural and food products <ul style="list-style-type: none"> Construction and modernisation of logistics and technological infrastructure for the storage and sale of agricultural and fish products Purchase of machinery, equipment, cisterns Digital transformation 	Strengthening the competitiveness of participants in the supply chain of agricultural, food, fish and aquaculture products	Aid in accordance with EU rules, e.g. under the ABER, GBER	1.2 million EUR	RRP Version June 22 (PL) p. 126



F. Medicine & Pharmaceuticals

Sector	Investment	Objective	Public aid	Value	Link / Page in RRP RRP version June 22 (PL)
MedTech Medicine and health	D1.1.1. Development and modernisation of the infrastructure of highly specialised care centres and other healthcare providers	Improving the performance of highly specialised care centres and other healthcare providers by improving their infrastructure in key areas	None	2.119 billion EUR	p. 283
	D1.2.1. Development and modernisation of health care units at district level	Reconstruction, expansion and construction of new infrastructure for medical facilities	None	150 million EUR	p. 443
Pharmacy Chemistry MedTech Research	D.3.2. Creation of favourable conditions for the development of the medicines and medical devices sector	<ul style="list-style-type: none"> Increasing medicines supply safety Increasing the availability of medicines 	Aid for enterprises see below. D3.2.1	None	p. 446
	D3.2.1. Developing the potential of the medicines and medical devices sector - investments linked to the production of API	Development of Polish APIs, medicines and medical devices	Regional investment aid or in accordance with the TFEU and the guidelines on regional aid	139.5 million EUR	p. 448



G. Aviation

Sector	Investment	Objective	Public aid	Value	Link / Page in RRP RRP version June 22 (PL)
Aviation Production IT AI Robotics	A2.3.1. Development and equipment of competence centres (inter alia specialist training centres, implementation support centres, observatories) and unmanned vehicle industry management infrastructure, as an Ecosystem of Innovation	Establishing an integrated system of competence centres, pilot projects and infrastructure for unmanned vehicles	Projects may be a combination of various objective commitments in the GBER - mainly research and development projects under Art. 25 and possible regional aid under Art. 14 and Art. 26, 29, 31, 36, 37 and 48	164 million EUR	RRP p. 137



H. HoReCa, Tourism, Culture

Sector	Investment	Objective	Public aid	Value	Link / Page in RRP RRP version June 22 (PL)
Hotels Tourism Culture	A1.2.1. Investments in products, services and competences of employees and staff related to the diversification of activities	Support for enterprises (SMEs) in sectors most affected by the pandemic and its impact. Concerns projects aimed at expanding or changing the activity profile or business model	Public aid or de minimis aid	500 million EUR	RRP p. 119



I. Taxes

Sector	Measure	Objective	Implementation	Link / Page in RRP version June 22 (PL)
General tax instruments	National System of e-invoices	<ul style="list-style-type: none"> Issuing and providing structured invoices Initial phase: structured invoices as a permissible form of transaction documentation alongside paper invoices and electronic invoices currently in use 	2Q 2024 (Proposal adopted)	About the system (PL) Amending provisions RRP p. 236
	Registration fees for combustion vehicles	<ul style="list-style-type: none"> Introduction of a fee for vehicles with combustion engines Reducing the number of the most emission-intensive vehicles Promotion of low-emission modes of transport (details of the wording of the proposed regulation are not available) 	4Q 2024 (No proposal)	RRP p. 317
	Tax for emissions-related vehicles	<ul style="list-style-type: none"> Regulations to introduce an ownership tax for emissions-related vehicles in line with the "polluter pays" principle (no information on the wording of the proposed regulation) 	2Q 2026 (No proposal)	RRP p. 317
	New tax depreciation limits for passenger cars	Depreciation limits as of 2026: <ul style="list-style-type: none"> PLN 225,000 – for passenger cars that are electric vehicles under Art. 2(12) of the Act on Electromobility and Alternative Fuels, and for passenger cars that are hydrogen-powered vehicles under Art. 2(15) of the said Act PLN 150,000 – if the CO2 emissions of the combustion engine of a passenger car are less than 50 g/km PLN 100,000 – if the CO2 emissions of the combustion engine of a passenger car are 50 g/km or more according to the vehicle register 	1Q 2026 (Proposal accepted)	Amending provisions RRP p. 317



J. Public procurement

In the RRP, great attention was paid to the component of green, intelligent mobility. Within this component, investments in the railway sector are particularly important.

It is emphasised that thanks to the RRP funds, the railway sector in particular has a chance to cause a “civilisational leap”. Funds totalling **4 billion euros** have been earmarked for rail transport alone. The initiative to improve the railway infrastructure provides for the electrification of around 115 km of lines and an increase in the maximum speed of trains to 160 km/h for a further 70 km of lines. On railway line 4, in turn, more than 200 km are to be operated at a maximum speed of 250 km/h. The scale of investment in the railway sector is therefore significant.

In addition, the RRP provides for the renovation of rolling stock to offer efficient transport services. The funds will not only be made available for long-distance trains, but also regional trains. The planned investments therefore include the acquisition of a large number of rail vehicles, which creates opportunities for manufacturers of various types of rail vehicles.

There are also plans to increase the share of public transport and reduce the environmental impact. To this end, modern trams and zero-emission and low-emission buses are planned to be purchased.



The funds will be used, *inter alia*, to conduct the following public tenders:

- Modernisation of further sections of the railway line 104 “Podłęże-Piekietko”
- Delivery of 300 railcars to PKP Intercity (with option rights for a further 150 railcars)
- Delivery of 20 new locomotives for PKP Intercity
- Expansion of 10 transshipment centres for intermodal transport
- Delivery of 250 intermodal transport units based on the DNSH principle (silent brakes, zero emissions)
- Delivery of new electric and hydrogen-powered buses worth around PLN 170 million and new trams worth around PLN 180 million to MPK Poznań
- Delivery of electric buses for local public transport in Kielce
- Delivery of more than 1,700 buses used in regional transport for units throughout Poland



Further projects are planned, for example:

- Construction of the Gliwice Municipal Hospital
- Construction of an oncological hospital in Wrocław
- Construction of wind farms in the Baltic Sea
- Thermal modernisation of schools and libraries
- Construction of new nurseries



As far as the procedures are concerned, around **65%** of the funds from the RRP will go to the public sector. They will be disbursed primarily based on the **Polish Public Procurement Act**. The procurement procedures described in the said Act, i.e. open tender, limited tender, negotiation with notice, competitive dialogue, innovation partnership, negotiation without notice or exclusive contract, will be used. Contracts are always awarded as part of an open or limited tender. The other procedures are only used if the conditions specified in the law are met.

If you would like to find out more about the RRP and the financing options for individual projects, do not hesitate to contact us.

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