

# OECD ECONOMIC SURVEY OF POLAND

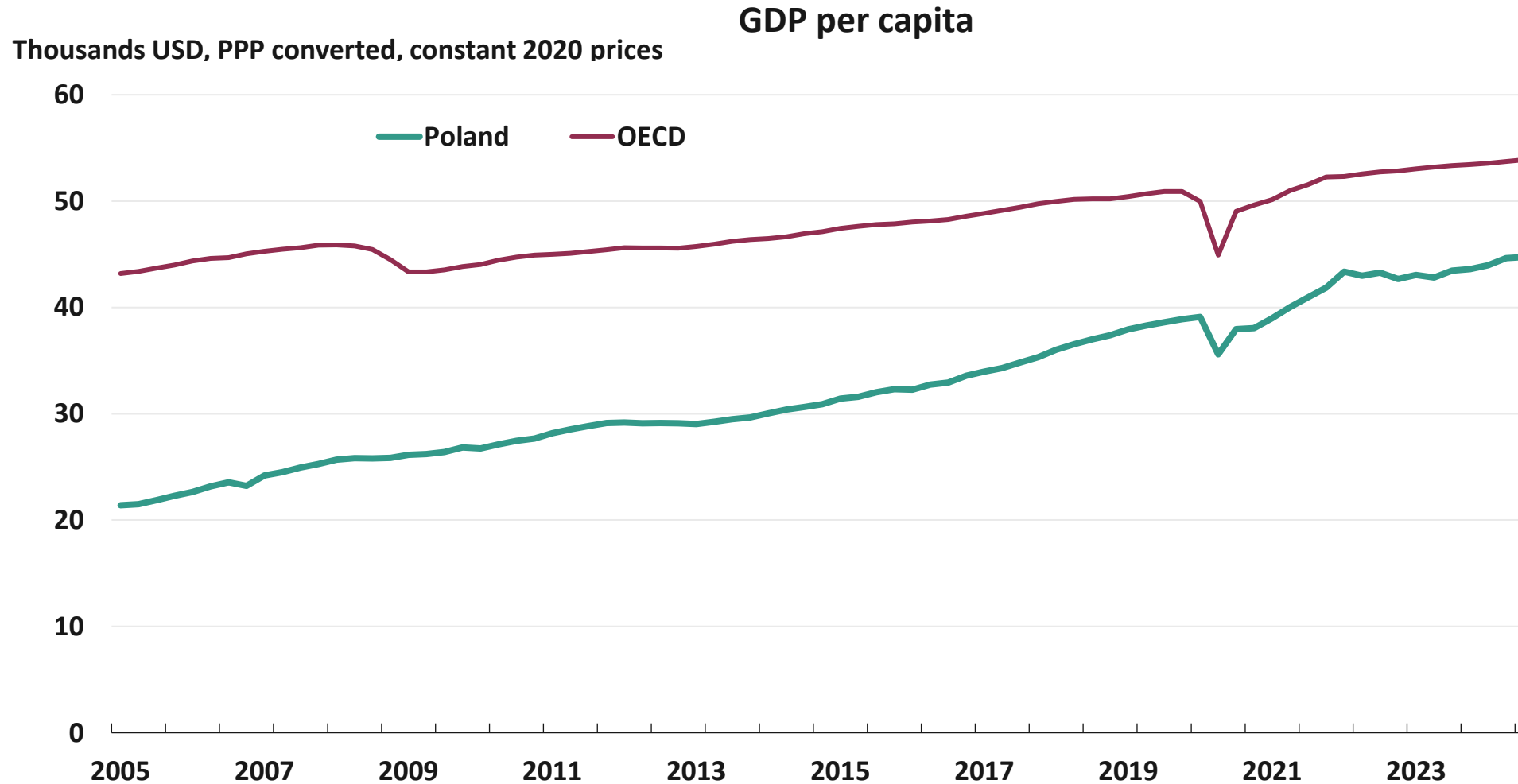
Towards a strong and healthy economy

Warsaw

4 February 2025

<https://oe.cd/poland>

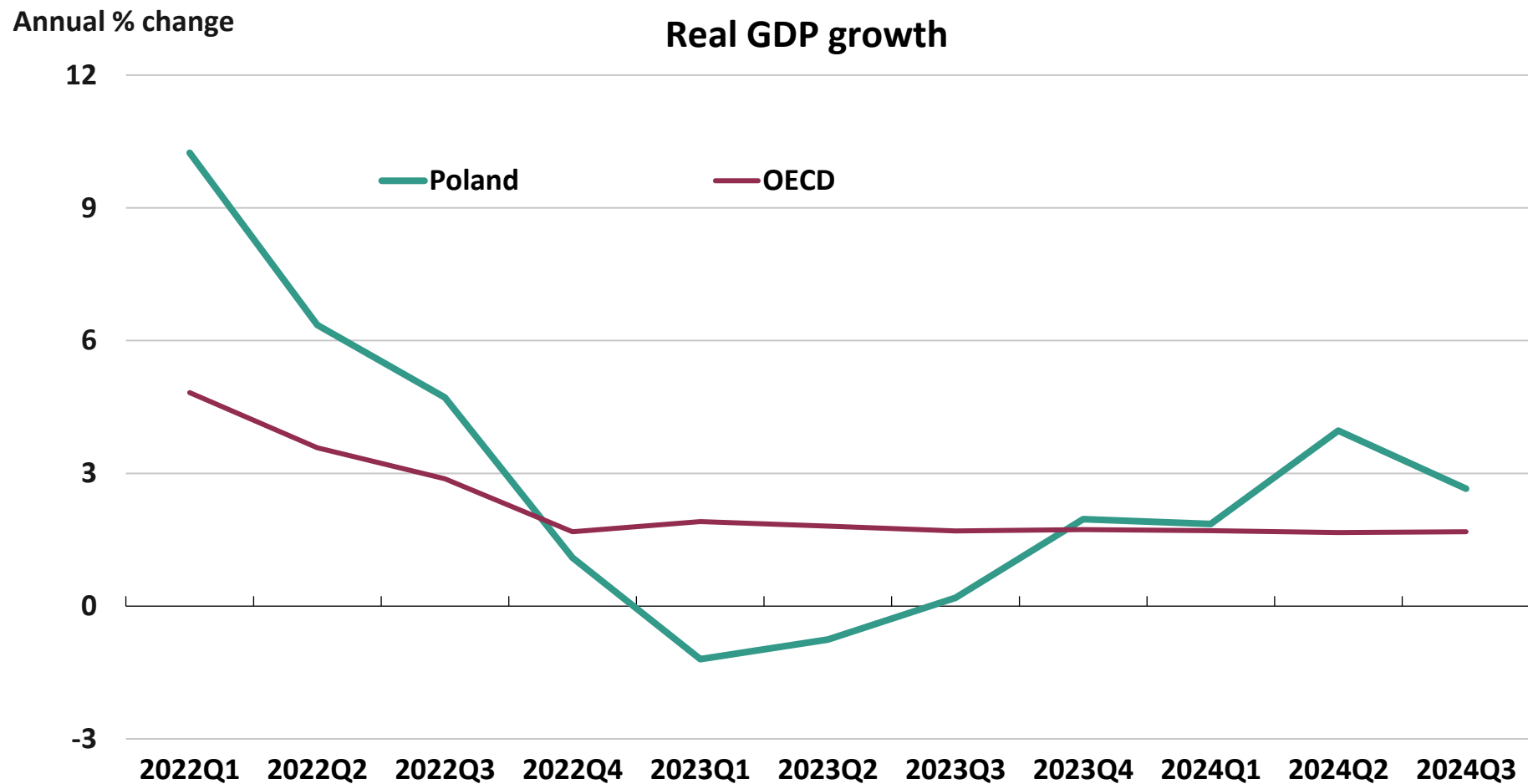
# Living standards have increased significantly and converged towards those in other OECD countries



Note: Seasonally and calendar adjusted data.

Source: OECD Economic Outlook database.

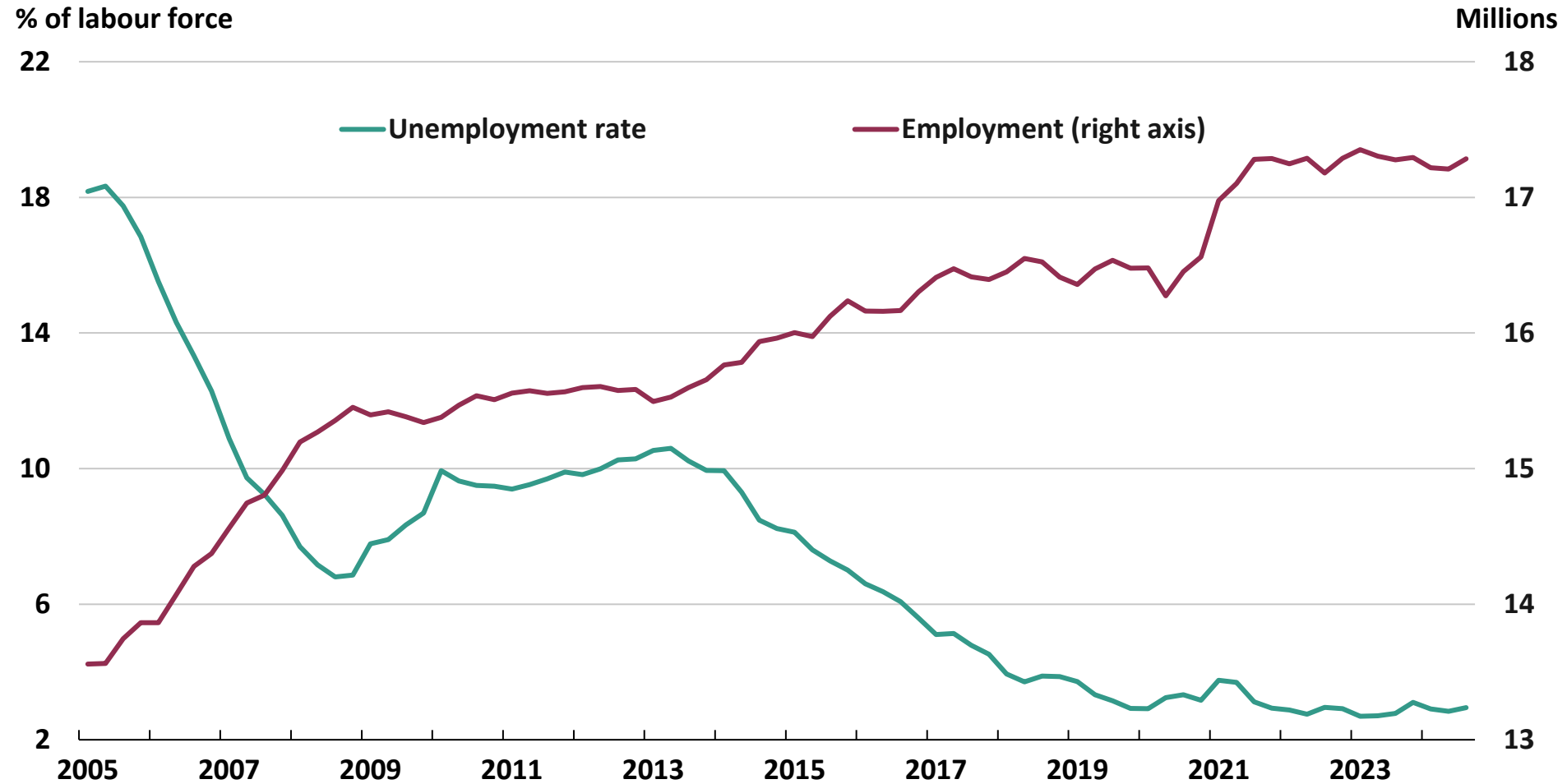
# The economy regained momentum in 2024



Note: Q stands for the quarter in the year. Seasonally and calendar adjusted data.

Source: OECD Economic Outlook database.

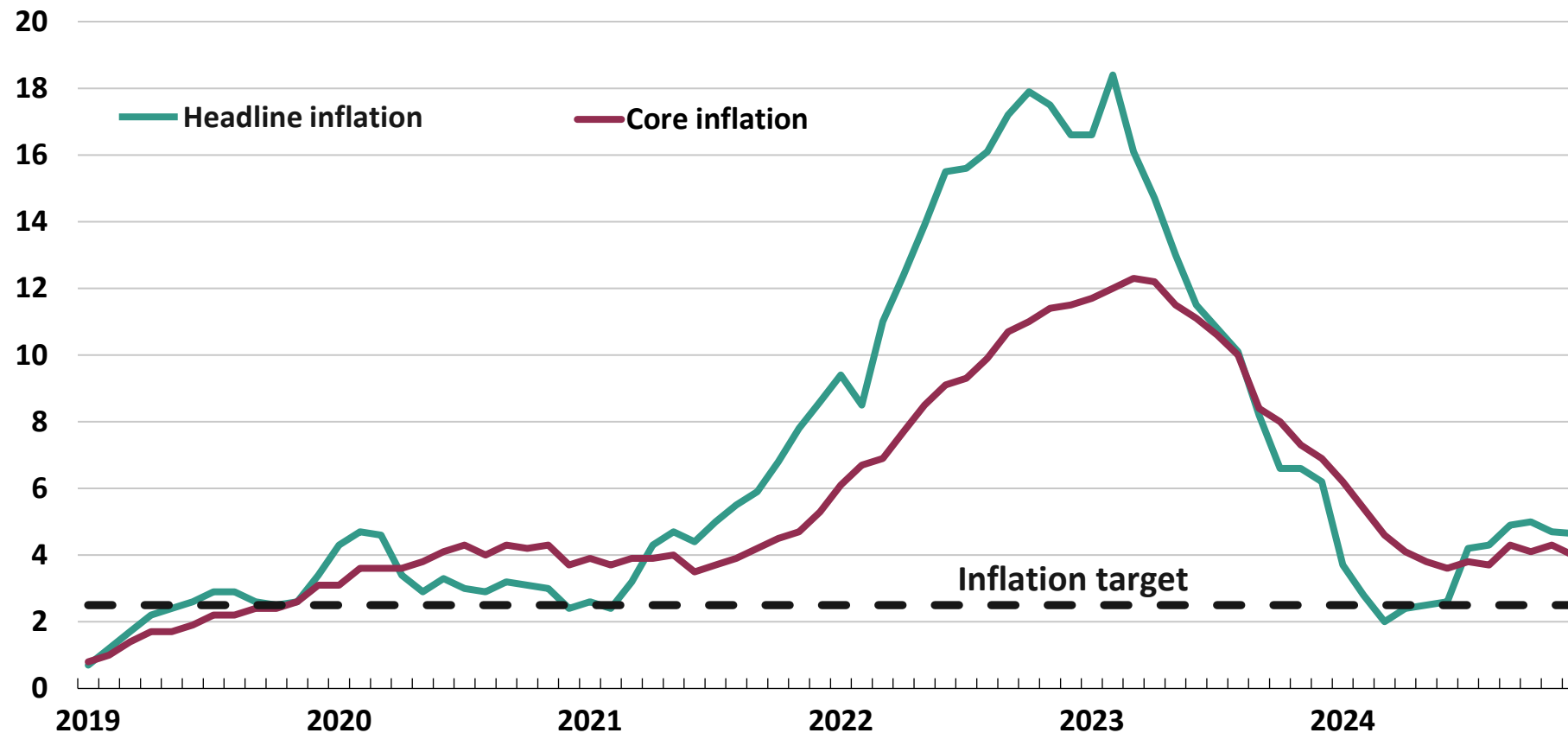
# The labour market has been strong



Source: OECD Economic Outlook database.

# Monetary policy needs to remain restrictive to bring inflation to the central bank target




Year on year % change



Note: The central bank target for inflation is 2.5% with a symmetric band for deviations of +/- 1 percentage point in the medium term. Core inflation excludes food and energy items.

Source: OECD Analytical database.

# Growth is set to continue

	2024	2025	2026
 Real GDP growth, %	2.9*	3.4	3.0
 Consumer price inflation, %	3.8	5.0	3.9
 Public finance balance, % of GDP	-5.8	-5.8	-5.1

Note: \* Flash estimate by Statistics Poland.

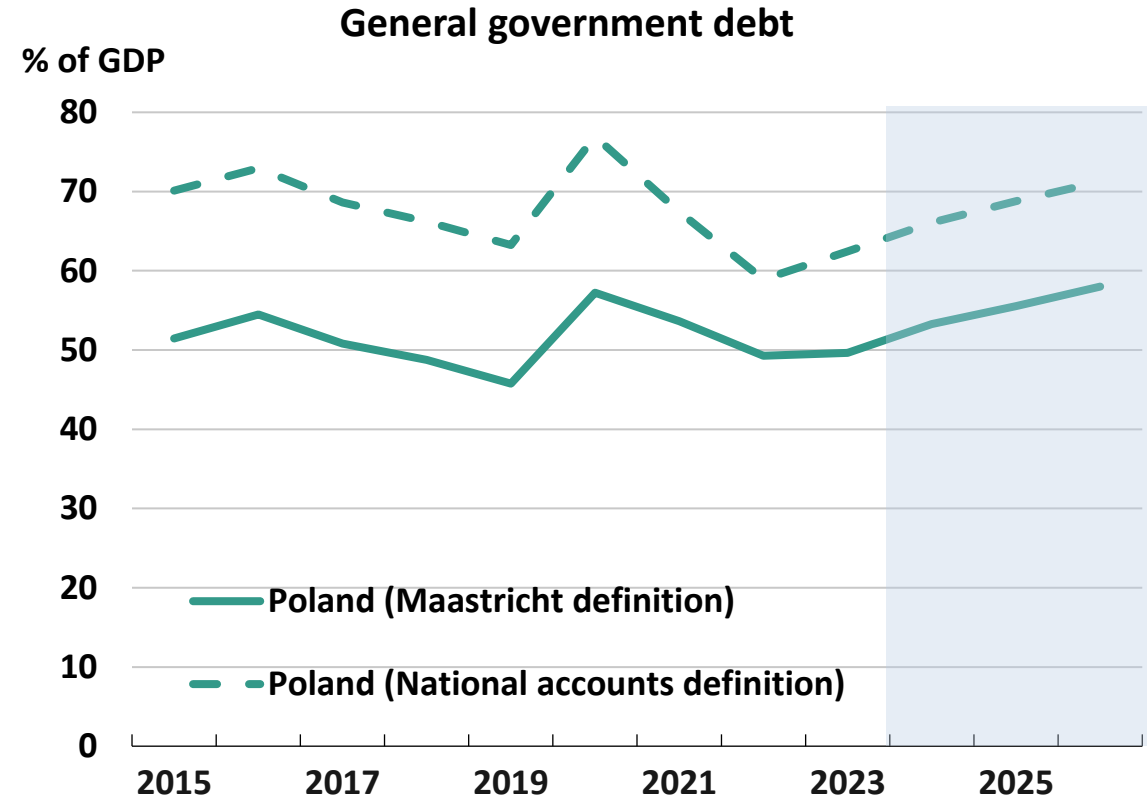
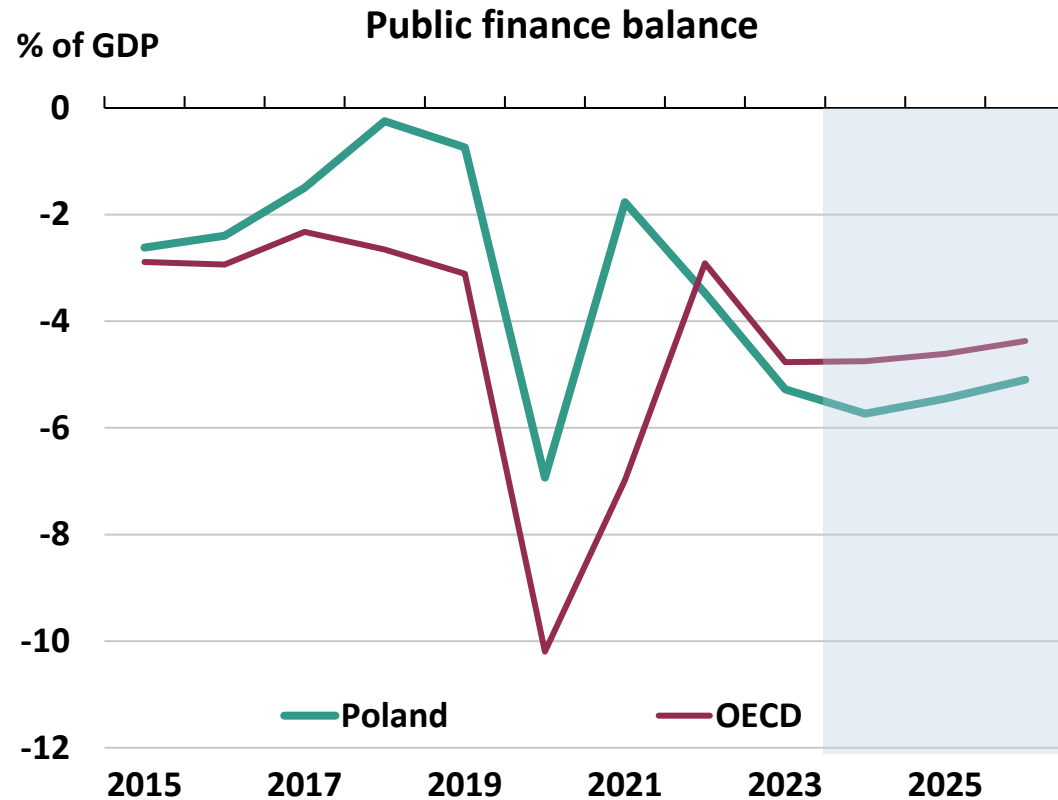
Source: OECD Economic Outlook database.



# Improving fiscal sustainability



# Fiscal adjustment is needed to contain public debt



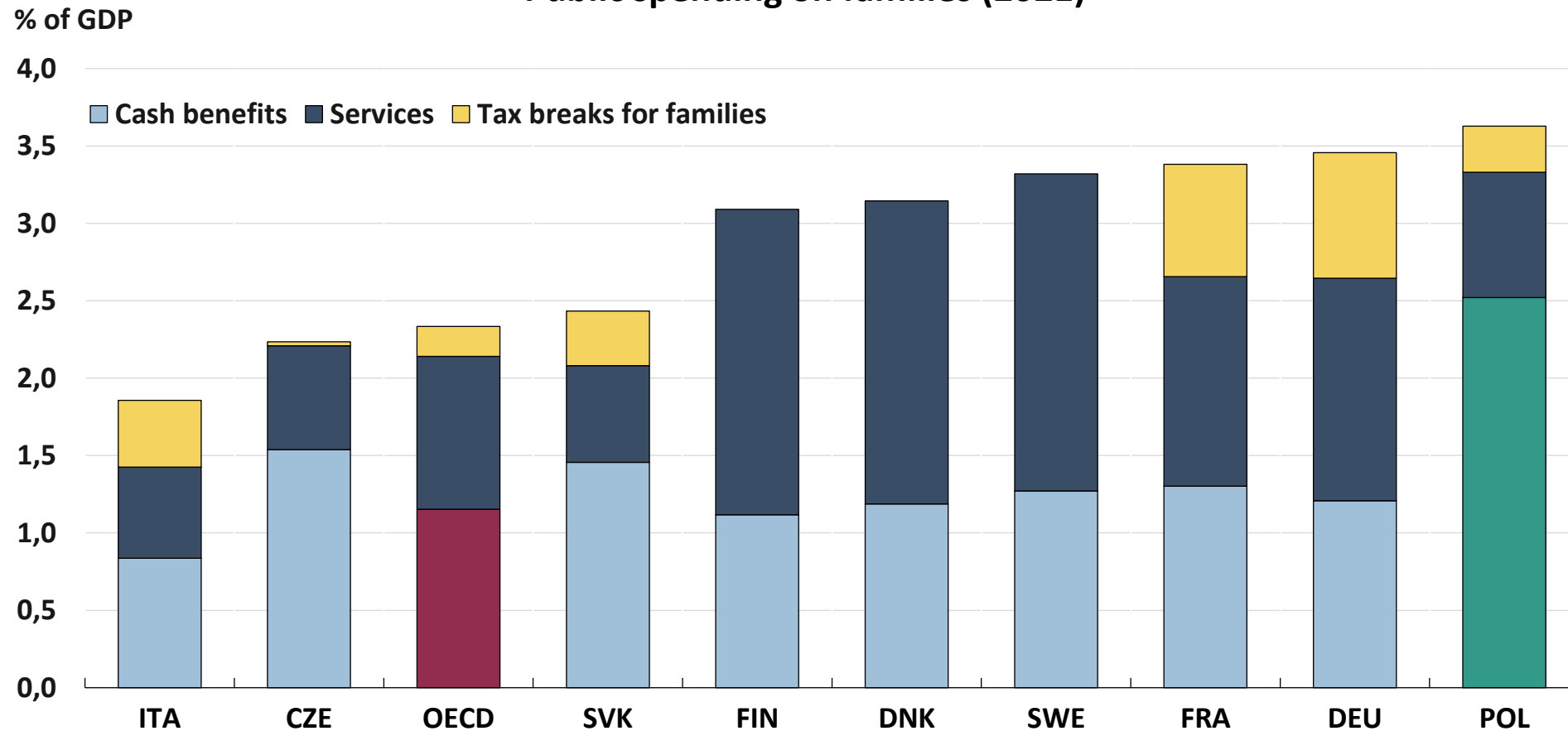
Note: Shaded area corresponds to the projection period in the December 2024 OECD Economic Outlook.

Source: OECD Economic Outlook database and Eurostat.



# Better targeting universal family benefits can reduce spending

Public spending on families (2021)

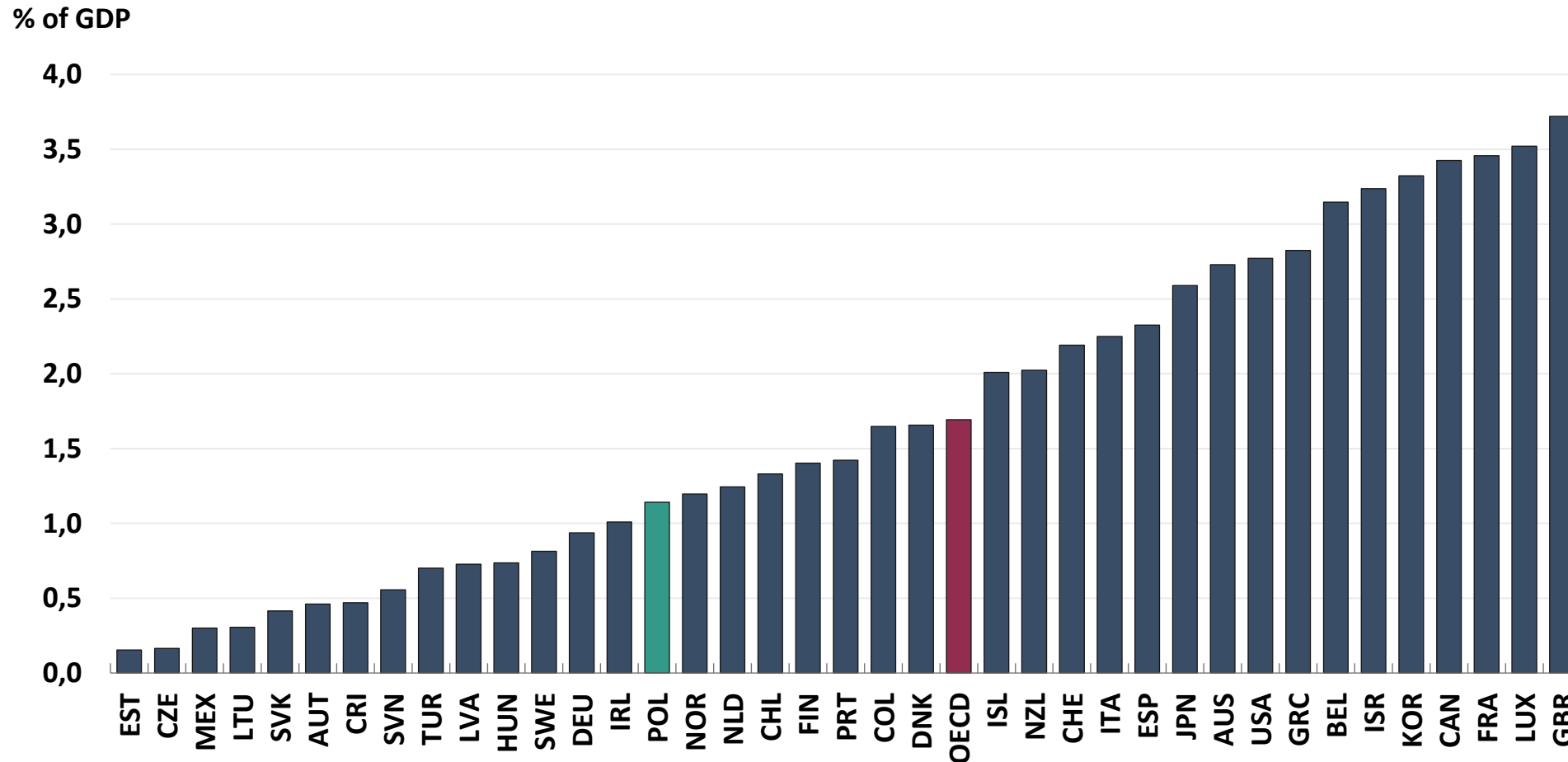


Note: Neighbouring and selected European countries.

Source: OECD Distribution of Earnings database.

# Expanding property taxes can help balance public finances

Revenues from property taxes (2023)



Source: OECD Revenue Statistics database.

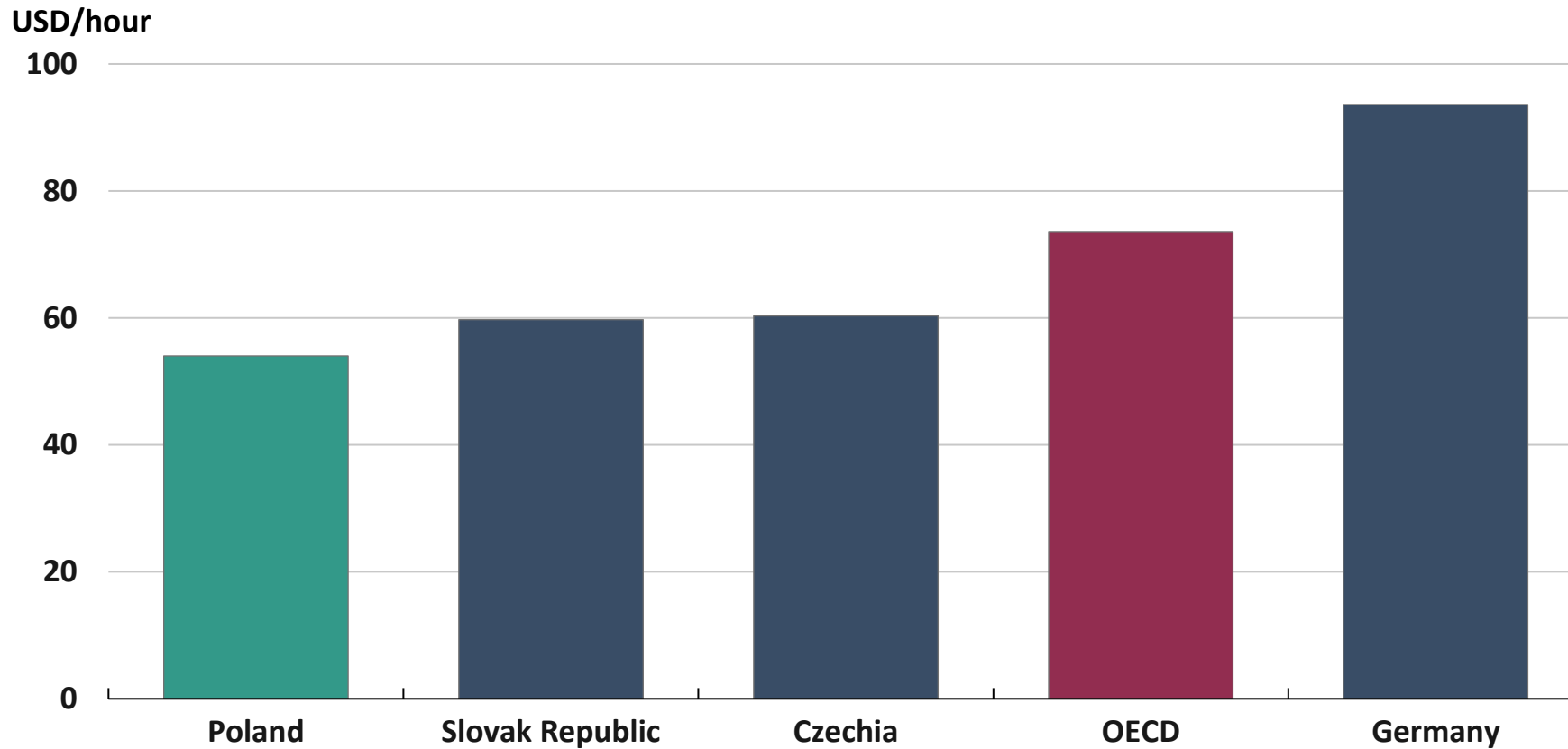


**Boosting  
productivity**



# Productivity is below that of peer countries

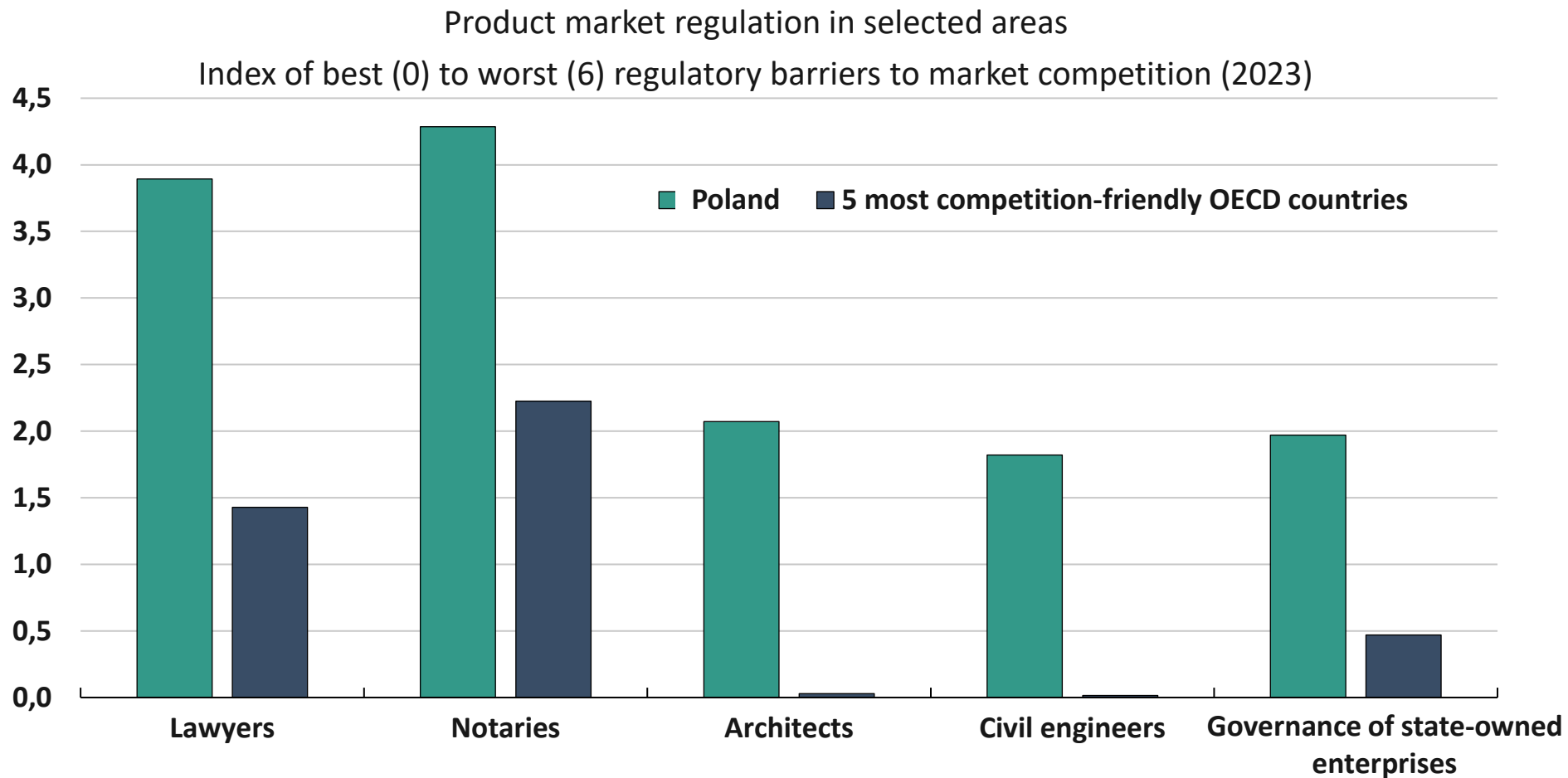
Labour productivity (2023)



Note: Labour productivity corresponds to GDP converted to US dollars per hour worked, current prices and current PPPs.

Source: OECD Compendium of Productivity Indicators 2024 database.

# More competition and better management of state-owned enterprises could boost productivity

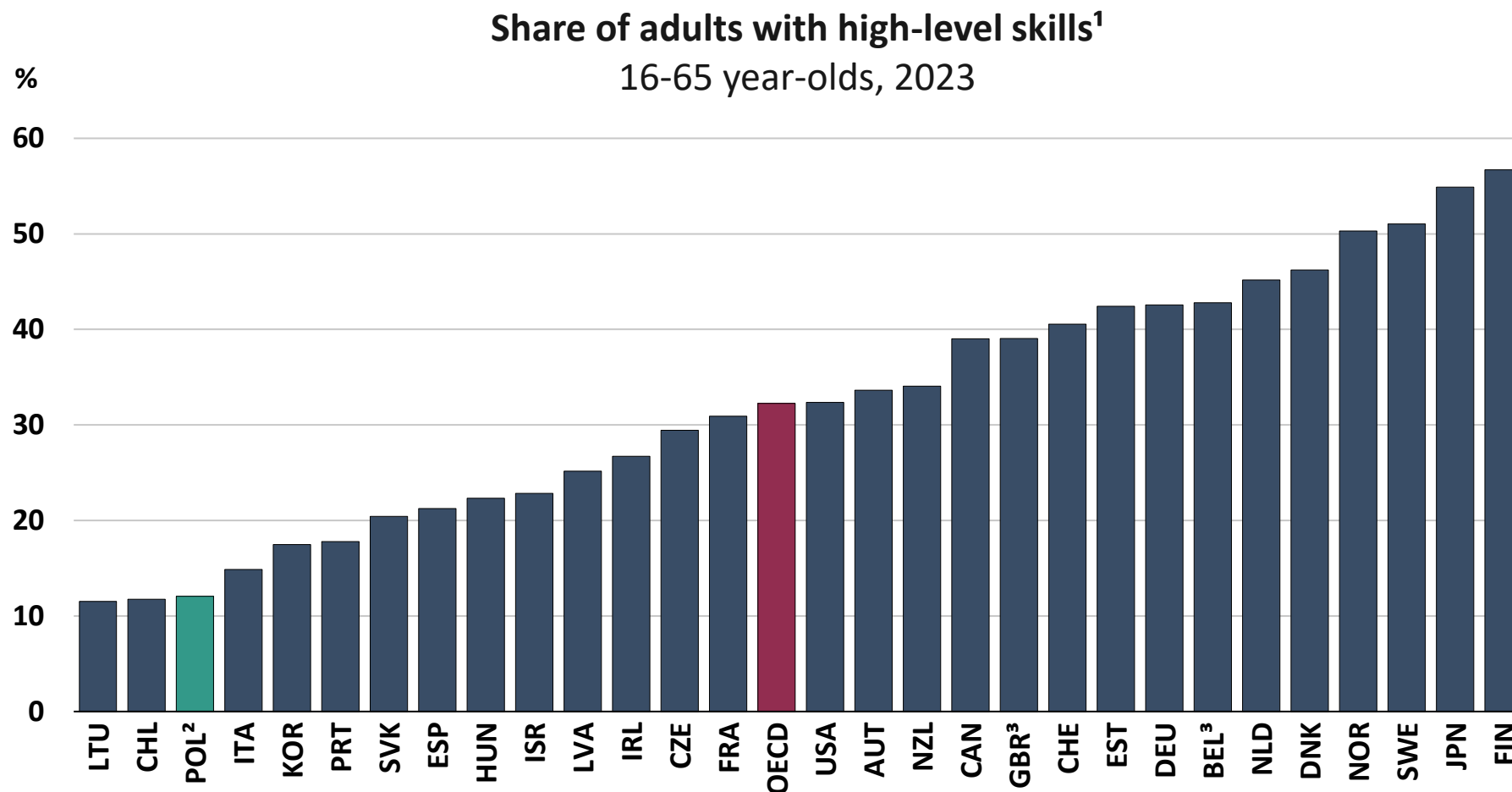


Note: The 5 most competition-friendly OECD countries correspond to Australia, Canada, Chile, Colombia and the United Kingdom for Lawyers; Costa Rica, Ireland, the Netherlands, Sweden and the United States for Notaries; Denmark, Finland, the Netherlands, New Zealand and Sweden for Architects; Belgium, Denmark, Finland, the Netherlands and Sweden for Civil engineers; and Finland, Italy, Norway, Slovenia and Sweden for governance of state-owned enterprises.

Source: OECD Product Market Regulation database.

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# Upskilling of workers and entrepreneurs is key



Note: 1. Average share of adults scoring high in literacy, numeracy (proficiency level 4 or 5) and adaptive problem-solving (level 3 or 4) in the Programme for the International Assessment of Adult Competencies (PIAAC).

2. Due to high share of respondents with unusual response patterns caution is required in interpreting results for Poland.

3. Data for Belgium refer only to Flanders, and data for the United Kingdom refer only to England.

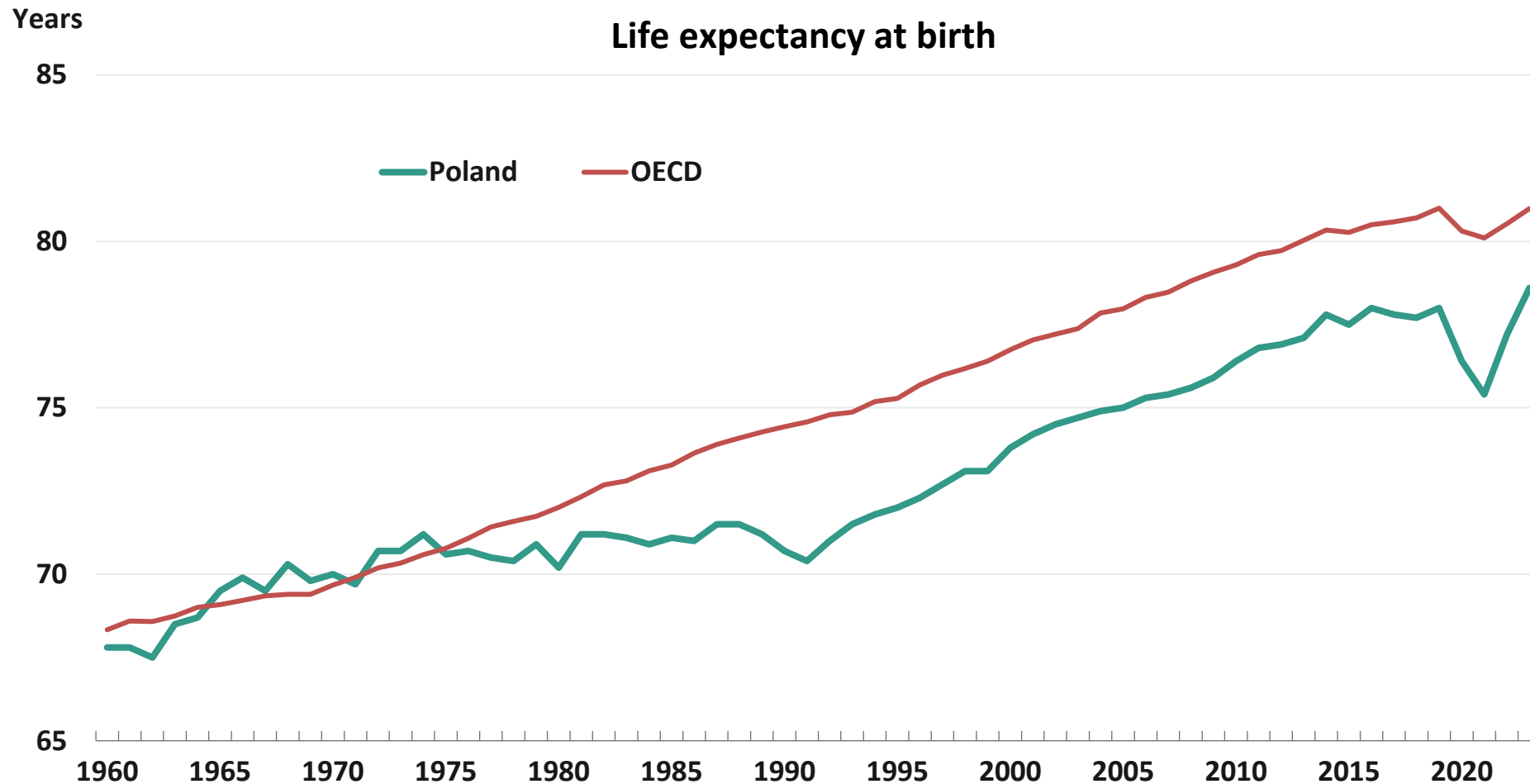
Source: OECD Survey of Adult Skills 2023 database.



**Towards  
better  
healthcare**



# Life expectancy has risen significantly though it remains below the OECD average

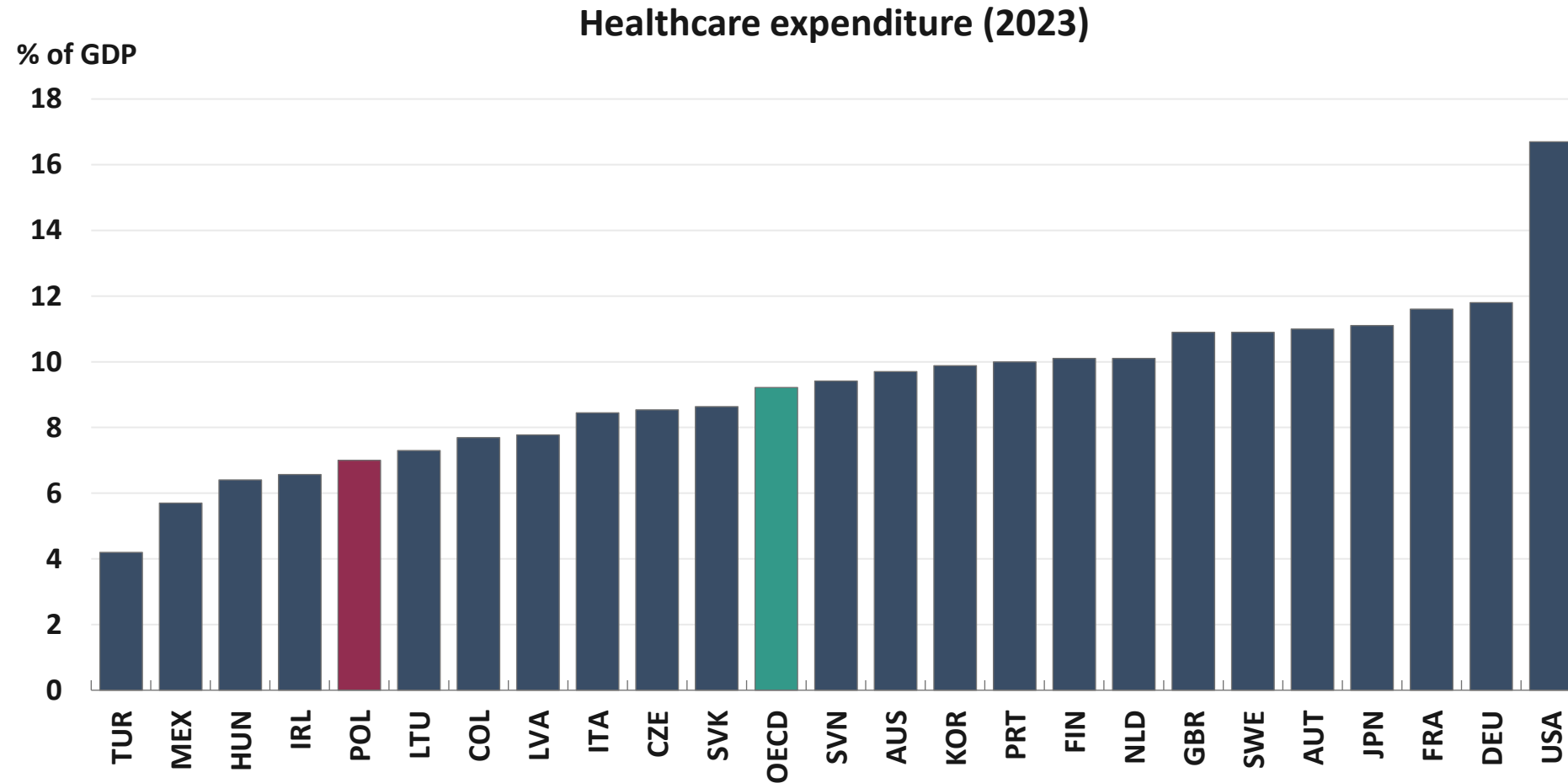


Note: The OECD average is weighted.

Source: OECD Health Statistics.



# Making good use of relatively low healthcare spending is key

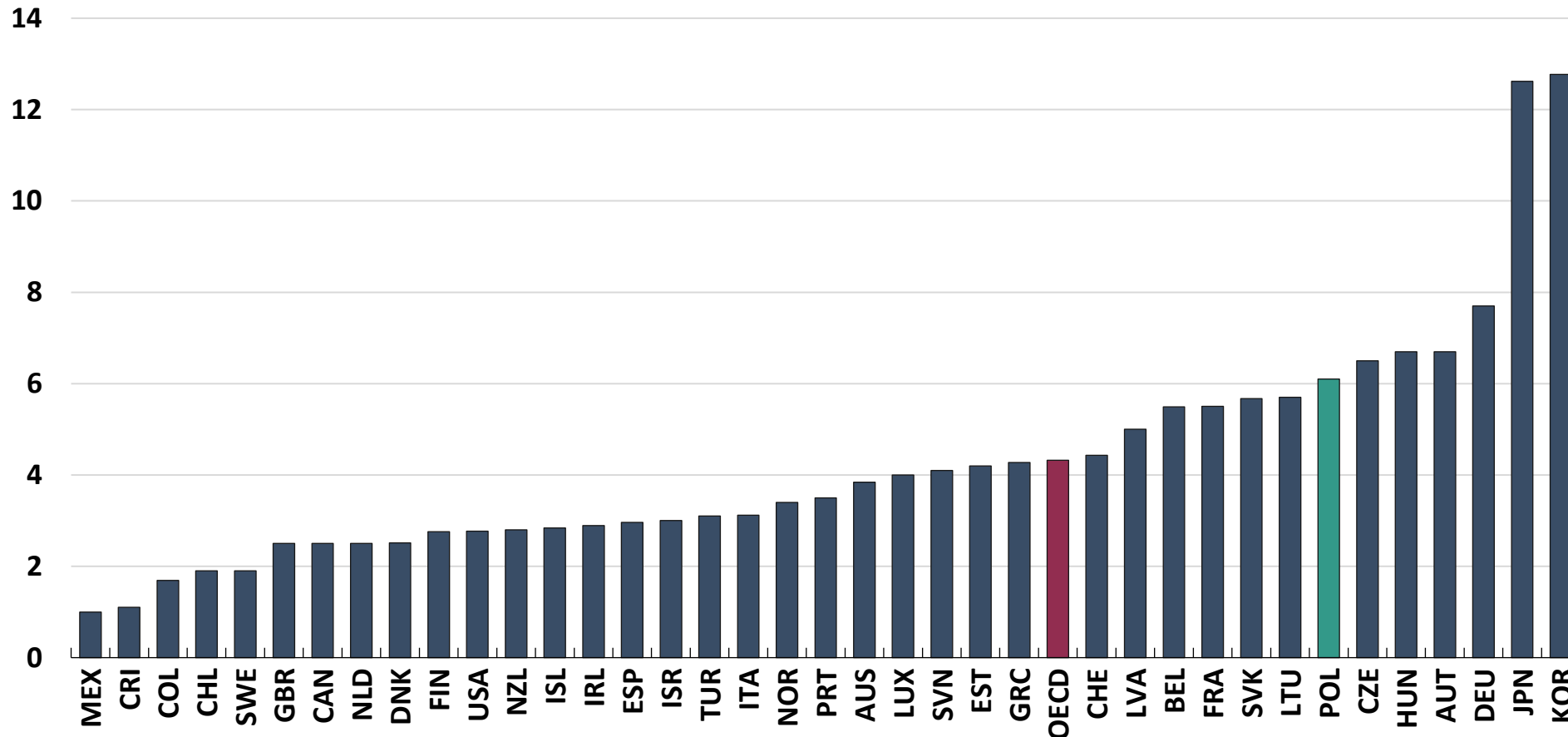


Note: The OECD average is unweighted.

Source: OECD Health Statistics.

# Improving the organisation of hospital care could raise care quality and reduce overcapacity, including of hospital beds

Number of hospital beds per 1 000 population (2022)

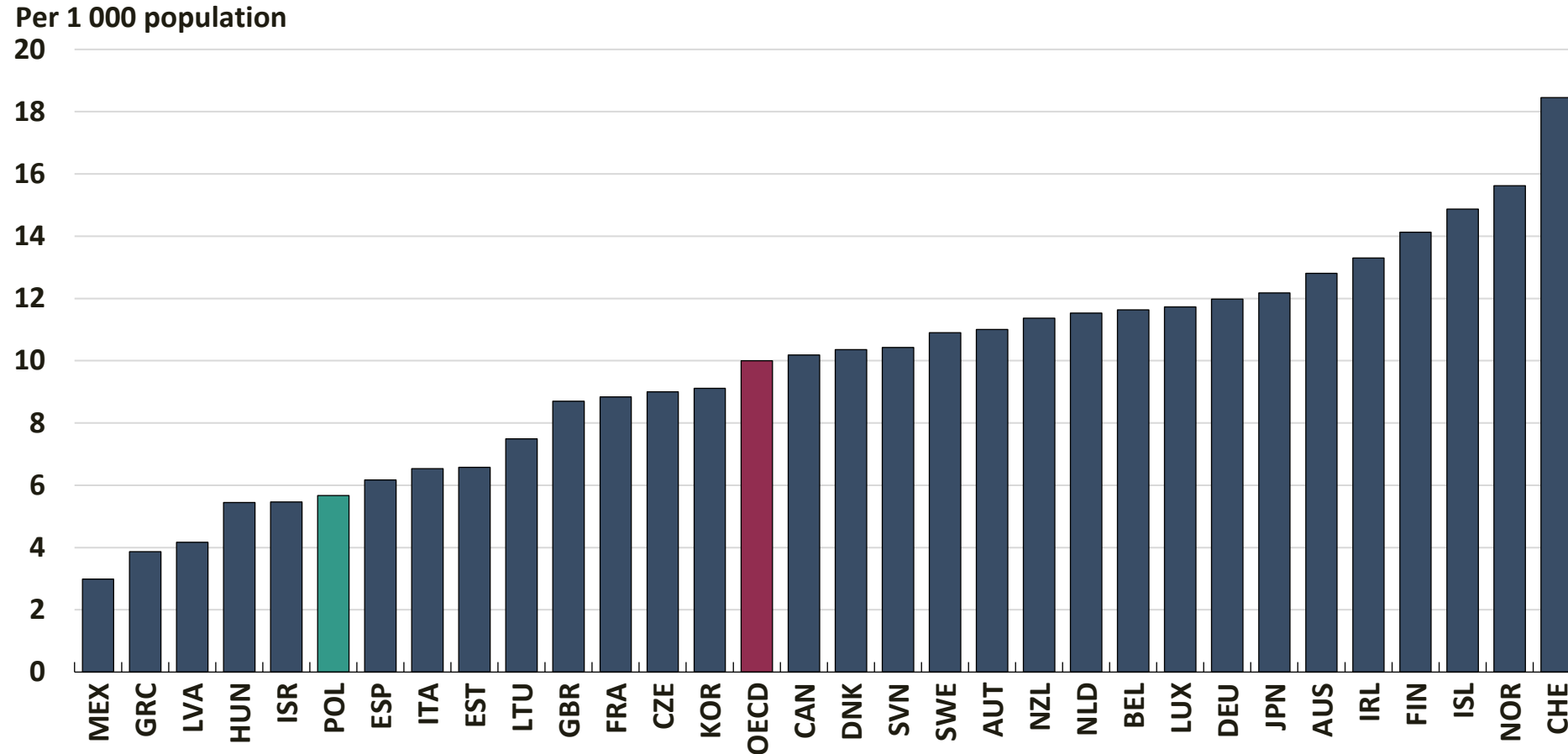


Note: The OECD average is unweighted.

Source: OECD Health Statistics.

# Better training and working conditions for nurses would help alleviate staff shortages

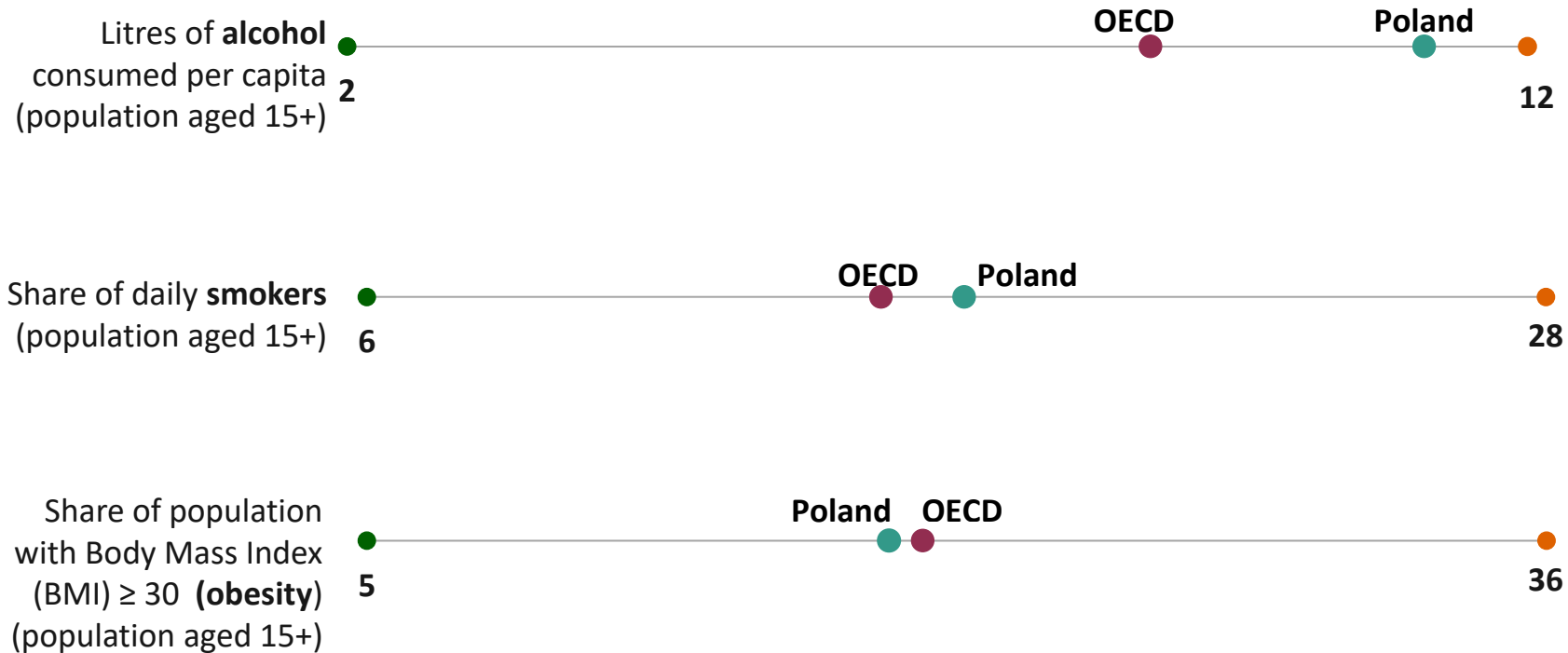
Number of practising nurses (2022)



Note: The OECD average is unweighted.

Source: OECD Health Statistics.

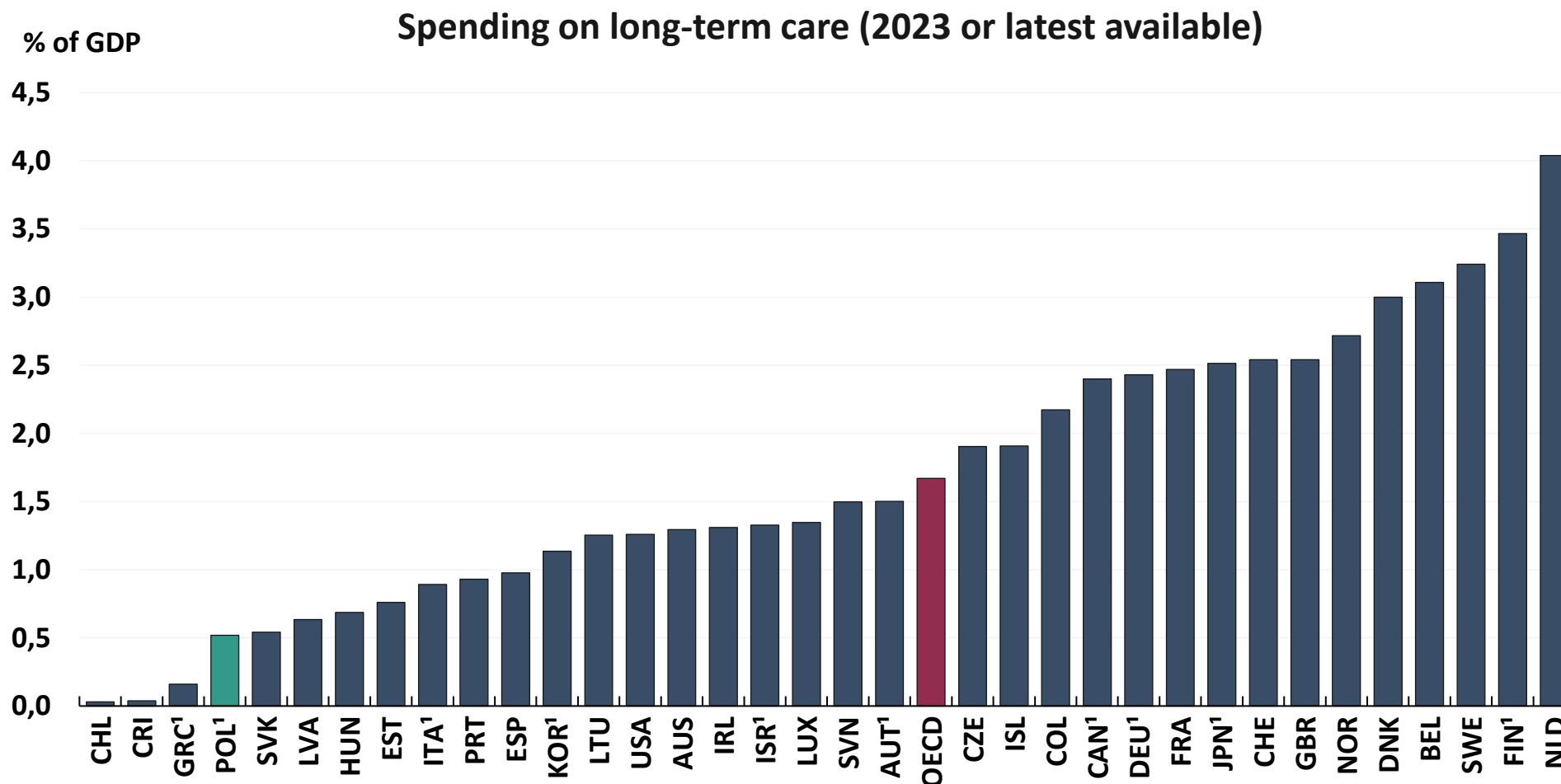
# Encouraging healthier behaviours for better health outcomes



Note: The end points on the scale represent the minimum and the maximum values among OECD countries. Data for alcohol, smoking and obesity refer to 2022 or the latest year available.

Source: OECD Health Statistics database.

# Expanding home-based and residential long-term care would help prepare for an ageing population



Note: 1. Countries not reporting spending on social long-term care (defined as assistance services that enable a person to live independently and subsidies for residential costs in assisted living services).  
Source: OECD Health Statistics.

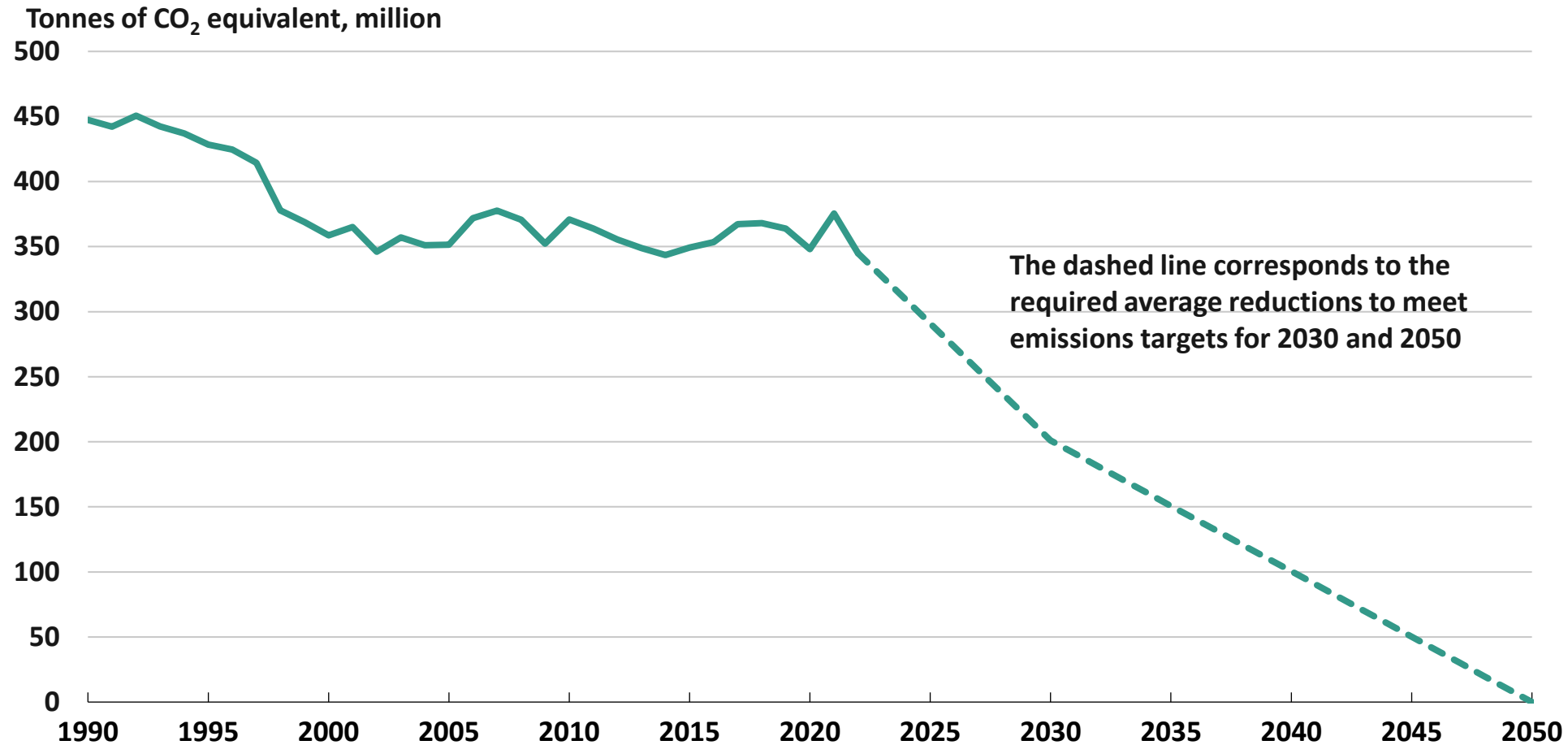


# Accelerating the green transition



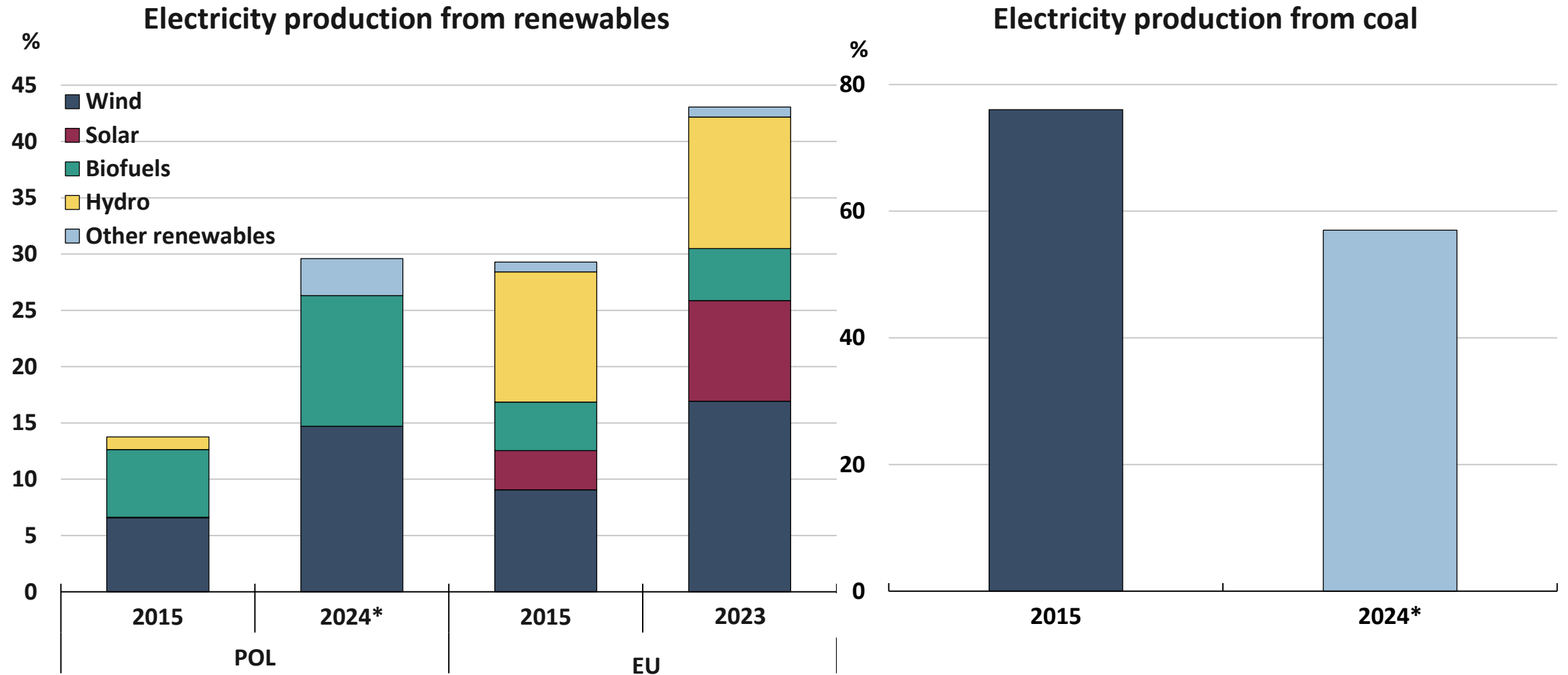
# Progress towards climate goals needs to accelerate

## Greenhouse gas emissions



Note: The dashed line is the interpolated path to the emissions reduction targets for 2030 and 2050 (net-zero emissions).  
Source: Environmental Protection Agency.

# Speeding up deployment of renewables and the phase-out of coal should be priorities

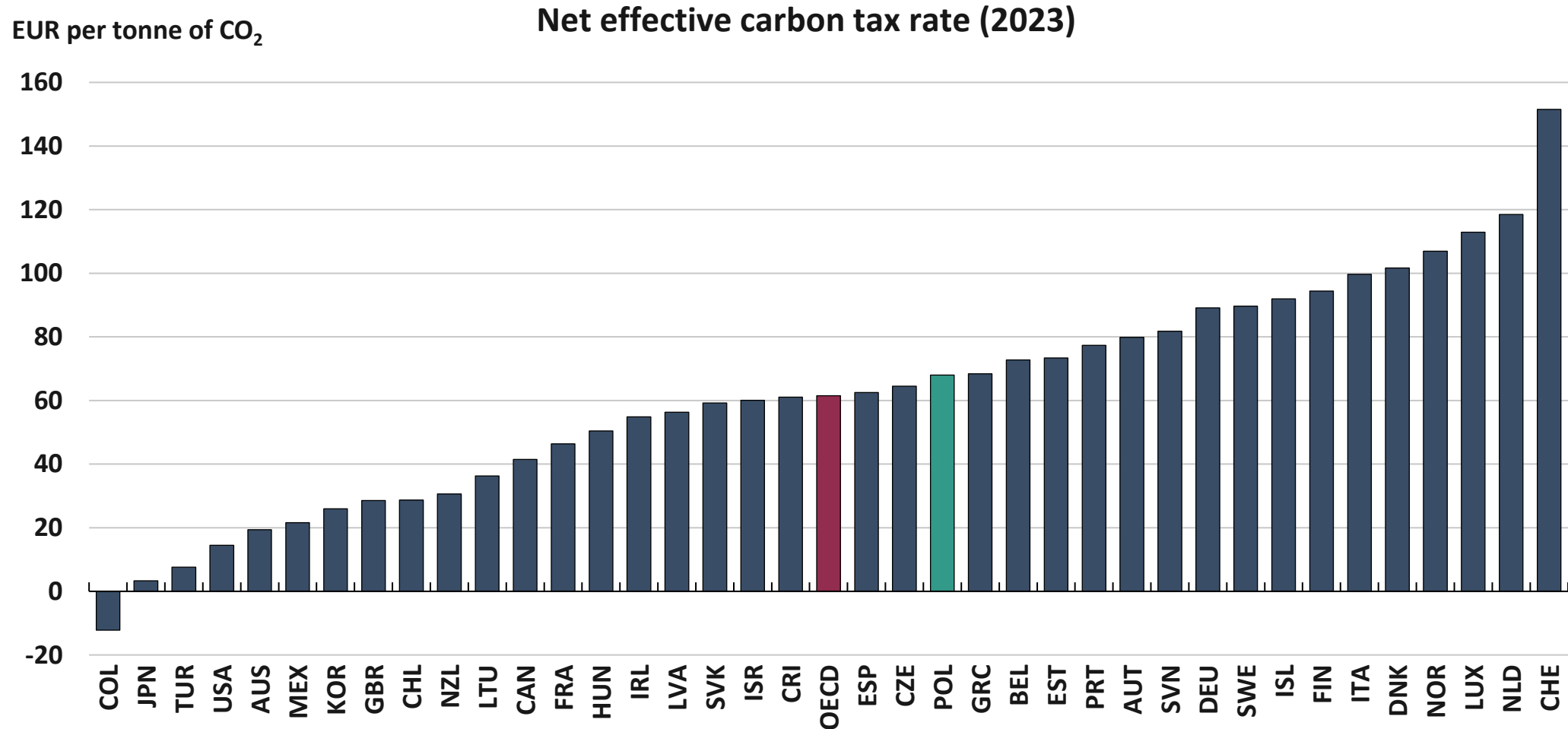


Note: \* Preliminary estimates for 2024.

Source: Forum Energii (2025), OECD Green Growth Indicators database, International Energy Agency.



# Setting out a clear long-term path for carbon pricing would facilitate private sector investment



Note: Indirect CO<sub>2</sub> emissions are excluded.

Source: OECD Pricing Greenhouse Gas Emissions 2024.



# Main messages

## Monetary

Sufficiently restrictive monetary policy will bring inflation to target.

## Fiscal

Poland requires a sustained fiscal adjustment to reduce the deficit and avoid excess demand, while addressing rising ageing costs.

## Productivity

Enhancing competition and upskilling of workers can support continued convergence and productivity growth.

## Health

The effectiveness of the health system and health outcomes can be enhanced by reforms improving incentives, staffing and prevention.

## Green

Faster policy action in energy production and setting out a clear long-term path for carbon pricing would decrease greenhouse gas emissions.



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