The Generative Portrait of Poland. Part II, “Poland for Business”: key findings and quotes

1. Scope sentence and lead (to be copied unchanged)

Scope sentence: The study covers six generative AI models queried through their official APIs: ChatGPT, Gemini, Claude, Perplexity, Grok and DeepSeek.

The method in one sentence: Between 25 August and 28 September 2026, six models received 700 questions on behalf of company personas from 12 markets, in the languages of those markets (where to build a plant, whom to contract production to, where to find engineers, how to vet a business partner), and the 4,200 answers were assessed by the same model judge; a separate shortlist measurement (96 questions that do not name Poland, 576 answers, 30 September) tested whether the models put Poland forward to companies of their own accord. The research programme as a whole comprises more than 14,500 answers.

Lead (draft, 3 sentences): Language models (LLMs) almost always talk to companies about Poland, even when nobody asks about it: it comes up in 98 answers out of 100. The problem is not presence but role: in questions about a sales market, Poland is recommended in more than nine in ten answers, and in questions about a warehouse for Europe in six in ten, because it loses on geography, not on cost. It is the first map of its kind, measured rather than clicked through by hand: this is Poland as it emerges from 4,200 answers given by six models to questions from companies in 12 countries.

(“98 out of 100” = 98.4% of the 576 shortlist answers; “more than nine in ten” = 93.1%; “six in ten” = 62.3%. In the lead only; in the body text, always with the figure.)

2. Candidate headlines (15; each with the figure that backs it)

no.	headline	figure and denominator	where
H1	**The models put Poland forward to companies of their own accord in 98 answers out of 100**	98.4% of 576 answers to 96 questions that do not name Poland (shortlist); explicitly recommended in 82.5%	chapter 2
H2	**Poland loses on geography, not on cost**	recommendation: sales market 93.1%, engineers 93.0%, contract manufacturing 69.4%, warehouse for Europe 62.3% (shortlist); cost is Poland’s argument in every logistics answer, while the hubs are the Netherlands and Germany (delivery to the west in 2–3 days)	chapters 2, 4, 10
H3	**The decision area picks Poland’s rivals: its neighbours in trade, Germany and the Netherlands in industry**	sales market / incentives / service centres: Romania, Hungary, Czechia, Slovakia, recommendation 81–93%; suppliers / manufacturing / logistics: Germany, Italy, Austria, the Netherlands, recommendation 62–69%	chapter 4

no.	headline	figure and denominator	where
H4	**The tone for companies is cooler, because companies ask about risk**	281 of the 700 company questions are risk questions: tone 6.16, one answer in eight negative, recommendation 49.7%; the rest: tone 7.20, negative answers 1.6%, recommendation 79.2%	chapter 1
H5	**Romania, absent from individuals' questions, is companies' second candidate after Czechia**	shortlist: Czechia 79.2%, Romania 74.1%, Hungary 66.7%, Germany 61.6%, Slovakia 56.8% of 576 answers; the same order in the 408 study answers to questions without Poland	chapters 2–3
H6	**KGHM appears in every answer about the largest Polish companies, but in 21 of 4,200 answers to companies**	144 of 144 (on request) against 21 of 4,200 (in use); PZU 139 against 1	chapter 5
H7	**The Polish companies that actually do the work in answers for business are registers**	Krajowy Rejestr Długów, a Polish debt register, 143 answers, BIG InfoMonitor 97, PSE 95, No Fluff Jobs 71, but none of them comes up when the question asks about the largest companies	chapter 5
H8	**Asked for certified Polish subcontractors, the answer names a Polish company in 5 cases out of 30**	5 of 30 answers (28 give some names); in industry questions overall, 99 of 150	chapter 5
H9	**Aviation, electronics and pharmaceuticals are strategic sectors that rarely appear in the answers**	0, 0 and 4 of the 144 answers about the largest companies; 24%, 17% and 7% among the strongest industries	chapter 5
H10	**PAIH is in the models' answers, but search in the market's language rarely leads to it**	in questions about incentives, PAIH, the Polish Investment and Trade Agency, appears in 26 of 27 answers with URLs given in the answer and in 3 of 12 with sources from search; among the three most-cited domains in 12 of 12 markets	chapter 6
H11	**Over half the URLs the models give companies lead to Polish sites; search, one in four**	54.5% of 5,809 citations (35.0% official) against 25.0% of 9,473 (6.9%)	chapter 6
H12	**The models add the Baltic ferry for Swedish companies of their own accord; the China–Europe railway only when asked**	ferry in 87 of 348 answers for Swedish companies, with no question about the ferry; railway in 98 of 348 for Chinese companies, 77 of them to questions about the railway	chapters 7, 10
H13	**The war does not cost Poland its recommendation: none of 864 answers advises against it as a choice, but only 3.8% recommend it without a "but"**	0 of 864; some answers suggest Czechia to risk-sensitive boards; no caveat 3.8%, "yes, but" 81.9% (questions about investment risk); as a base for the reconstruction of Ukraine, recommended in every answer	chapter 8
H14	**Companies hear different arguments about the war from individuals: the EU and energy rather than Belarus and ministries**	the EU in 86.9% of answers to companies, energy 75.0%; foreign-ministry warnings 3.4% (individuals 70.5%)	chapter 8

no.	headline	figure and denominator	where
H15	**Access to a search engine does not bring Poland into the answer, and Polish sources are as rare with it as without it**	a separate measurement from October (search mode): 233 questions that do not name Poland, three models, 699 pairs from the same day; the mention rate of Poland is the same or lower with search (ChatGPT 57.9% → 55.8%, Gemini 73.4% → 70.8%, Claude 84.1% → 74.7%); for ChatGPT, Polish domains make up 6.5% of URLs without the tool and 6.3% of sources from search; Gemini invoked search in 104 of 234 answers; for ChatGPT and Claude the search path uses a different instruction, so the fall for Claude cannot be attributed to search alone	section 6.5

3. Key findings (21; figure + denominator + one sentence on what follows from it)

1. **97.4% of the 4,200** answers to companies mention Poland; at the consideration and decision stages, 99.9% and 99.7%. A company that is thinking about Poland asks about it outright, which is why the real test is the shortlist. (chapter 1)
2. **68 of the 700 company questions do not name Poland** (408 answers): the model brings it in of its own accord in 75.2% and explicitly recommends it in 65.1% of the answers that mention it. For individuals in a comparable situation, the models explicitly recommend it in 52.2% (Part I; different questions, figures set side by side). (chapter 1)
3. **Tone 6.78 for companies against 7.12 for individuals** has a single cause: 281 of the 700 company questions (40.1%) themselves ask about risk, barriers and pitfalls. The model answers the question it is asked. (chapter 1)
4. **4 factual errors in 4,200 answers** to companies (Spain 2, Norway 1, Italy 1). (chapter 1)
5. **Shortlist: 567 of 576 answers** to questions that do not name Poland mention it (98.4%), as a country 97.4%; explicitly recommended in 82.5%. Question type makes no difference (region 99.6%, Europe in general 97.7%). For individuals, the same gap was 47 percentage points. (chapter 2)
6. **Eight decision areas, one level of presence, two levels of recommendation:** sales market 93.1%, engineers 93.0%, contract manufacturing 69.4%, warehouse for Europe 62.3%. Thirty percentage points apart, with the same presence. (chapters 2, 4)
7. **The top six competitors come in the same order in two sets** collected a month apart: Czechia, Romania, Hungary, Germany, Slovakia, Bulgaria. The list does not depend on the set of questions. (chapter 3)
8. **Asked about Europe in general, companies get Poland first (69.5% against 55.7% for Germany)**, the reverse of individuals, for whom Germany headed the list. A company asks with a criterion in mind: cost, engineers, distance from Germany. (chapter 3)
9. **For companies from the United States and China, the reference point is Germany:** it comes up more often than Poland (78.7% against 69.4% and 66.7% against 56.7%), with the difference made by questions about procedures. In questions about where to locate a plant, Poland comes first or second for these markets. (chapter 3)

10. **In industrial areas, the model names the company's own home country:** contract manufacturing 50.0% of answers, suppliers 43.1%, logistics 41.7%; in questions about a sales market, 11.1%. (chapter 4)
11. **A warehouse for the whole of Europe:** the models know Polish locations (53 of 72 answers), but the hubs are the Netherlands and Germany, because from there goods reach the west in 2–3 days; cost is Poland's argument in every one of these answers. (chapter 4)
12. **"A base that is growing" against "reliable" Germany:** in 9 of the 14 answers about suppliers in which Poland is not explicitly recommended, the description speaks of growth, not maturity. The missing argument is evidence of maturity: certifications, references, names. (chapters 4, 10)
13. **The canon on request:** KGHM 144 of 144, PGE and PKO Bank Polski 143, PZU 139, Allegro and Orlen 131, CD Projekt and LPP 122. **The canon in use** (4,200 company answers): KGHM 21, PKO 15, PZU 1. (chapter 5)
14. **A company that asks for names in an industry gets a Polish company in two answers out of three (99 of 150):** defence 18 of 18, furniture 11 of 12, food retail 10 of 12, but certified subcontractors 5 of 30. (chapter 5)
15. **The defence industry only when asked outright:** 0 of the 144 answers about the largest Polish companies, 3 of the 144 about the strongest industries, every answer about the Polish defence market. (chapter 5)
16. **Two source modes for companies:** of the URLs given in the answer by the model, 54.5% are Polish (35.0% official; 5,809 citations), and of the sources from live search, 25.0% (6.9%; 9,473). PAIH is among the three most-cited domains in each of the 12 markets; the National Court Register (KRS), gov.pl or biznes.gov.pl in nine. (chapter 6)
17. **Companies get Poland from Polish registers, not from their own ministry:** home-state authorities in 4.2% of answers to companies (individuals 12.0%); the exceptions are China, 12.4%, and the United Kingdom, 10.2% (gov.uk in 35 answers, ahead of PAIH). (chapters 6, 7)
18. **When a company does not ask about Poland, the source is Brussels:** ec.europa.eu in 53 shortlist answers, Polish sources about 5–6% of citations; PAIH is the most-cited investment agency (42 answers), almost always listed alongside the agencies of Czechia, Hungary, Romania and Slovakia. (chapter 6)
19. **The persona's home country makes the shortlist where the question comes from Central Europe:** Czechia 75.0%, Germany 72.9%, Slovakia 60.4% of 48 answers; from China, Ukraine and the United States, 0.0–2.1%. A company from the neighbourhood gets a comparison with its own country; a company from far away, a comparison of the countries of the region. (chapter 7)
20. **The models agree on whether to talk to companies about Poland (665 of 700 questions, 95.0%), but not on how:** on the same question, the warmest and the coolest answer differ by 1.8 points of tone on average, and in one question in five (20.5%) by 3 or more; when a company asks about risk, every model lowers its tone by 0.9–1.3 points, and the share of negative answers ranges from 6.1% to 17.5%. (chapter 9)

21. **Search mode (a separate measurement from October, 233 questions that do not name Poland, three models with a search tool):** when the same model answers a second time with a search engine, Poland does not come up more often (ChatGPT 57.9% → 55.8%, Gemini 73.4% → 70.8%, Claude 84.1% → 74.7%), and Polish sites are as rare among sources from search as among the URLs given without the tool, that is, without going to the web (ChatGPT 6.3% against 6.5%); with search, Claude most often cites Wikipedia (86 of 232 answers), and Gemini invoked the tool in only 104 of 234 answers. Search in the market's language hardly ever leads to Polish institutions. For ChatGPT and Claude the search path runs with a different instruction, so the difference should be read with caution. (section 6.5)

4. Quotes from the models' answers (11; verbatim, with Log ID)

C1. A shortlist from the United States, with Poland in the model's ranking (chapter 3)

> **"Assuming a general industrial operation rather than a highly specialized semiconductor, pharmaceutical, or battery plant, the strongest shortlist is in Central and Eastern Europe. My overall ranking is: […] 1 | Poland | Best overall balance: large labor pool, broad supplier base, competitive costs, resilient economy, good logistics, and substantial EU funding […] 2 | Czechia […] 3 | Slovakia […] 4 | Romania […] 5 | Hungary […]"**
>
> — ChatGPT, United States, a mid-sized manufacturing company planning its first plant in Europe; general question about the countries with the best combination of costs, workforce and stability (Log ID e12878f1-a315-407a-b21a-30a4d6c163a8). The question does not name Poland; Poland named, high recommendation level.

C2. Geography, not cost, or a hub in the Netherlands and Germany (chapter 4)

> **"荷兰（Netherlands）和德国（Germany）是最合适的首选国家，其次是比利时（Belgium）。这些国家能让大部分欧盟客户（德国、法国、荷兰、比利时、奥地利、波兰西部等）在2-3天内收到货。"**
>
> "The Netherlands and Germany are the most suitable countries of first choice, followed by Belgium. They allow most EU customers (Germany, France, the Netherlands, Belgium, Austria, western Poland, etc.) to receive goods within 2–3 days."
>
> — Grok, China, a household-goods seller looking for a warehouse in Europe with delivery to customers in two to three days (Log ID d8227307-2c7f-471e-8d22-f5bf1af8a5e1). Poland appears in the answer only as "western Poland", among the markets served.

C3. "A base that is growing", with quality still to be checked (chapter 4)

> **"Tschechien & Polen**
> **Wachsende Präzisionsfertigungsindustrie**
> **Oft Zulieferer für deutsche Hersteller – Qualitätsniveau überprüfbar**
> **Nähe zu Deutschland = kurze Transportwege**
> **Einschränkung: Qualität sehr heterogen, sorgfältige Lieferantenauswahl nötig"**
>
> "Czechia and Poland
> Growing precision-manufacturing industry
> Often subcontractors to German manufacturers – quality level verifiable
> Close to Germany = short transport routes
> Limitation: quality very uneven, careful supplier selection needed"
>
> — Claude, Germany, a furniture manufacturer looking for new suppliers of fittings, wood-based panels and foams (Log ID d2a091a9-598d-4b15-99f8-c96183f7e290). Regional question; Poland on the list with a caveat.

C4. Germany predictable, Poland changeable (chapter 1)

> **“Generelt kan man si at Tyskland lider av et overbyråkratisert, men svært forutsigbart system, mens Polen preges av raske politiske endringer, flaskehalser i infrastrukturen og en mer umoden konsesjonsprosess.”**
>
> “Broadly speaking, Germany suffers from an over-bureaucratised but highly predictable system, whereas Poland is marked by rapid political change, infrastructure bottlenecks and a less mature licensing process.”
>
> — Gemini, Norway, the management board of a company considering a large green-energy investment in Eastern Europe (Log ID 8f1cf372-de6c-4e9c-bdae-d22f9dde5f20). Risk question; tone 3, low recommendation level. One answer, not a finding of the report.

C5. Poland as the biggest opportunity, on one condition (chapter 4)

> **“Polsko je největší příležitost, ale vyžaduje vlastní obchodní zastoupení nebo silného lokálního partnera/distributora.”**
>
> “Poland is the biggest opportunity, but it requires a sales office of your own or a strong local partner or distributor.”
>
> — Grok, Czechia, a construction-chemicals manufacturer looking for export markets in Central and Eastern Europe (Log ID 2a5c83d2-513b-4c08-ac73-39ec0ac5ca3e). Regional question; high recommendation level.

C6. Subcontractors without names, or the model refuses (chapter 5)

> **“No puedo proporcionarte una comparación de costes totales con nombres concretos de tres proveedores polacos y dos checos porque: los precios, capacidades y condiciones comerciales son datos confidenciales y cambian constantemente; no dispongo de acceso a bases de datos de proveedores actualizadas ni a cotizaciones reales.”**
>
> “I cannot give you a total-cost comparison with the specific names of three Polish and two Czech suppliers because: prices, capacities and commercial terms are confidential data and change constantly; I do not have access to up-to-date supplier databases or to real quotations.”
>
> — Grok, Spain, a manufacturing company asking for a comparison of Polish and Czech component suppliers with IATF certification (Log ID a82b53e1-a9e9-4adc-880b-8a0d2fb777dd). Companies on demand: 5 of 30 answers name a Polish company.

C7. The war, or Poland as a base for rebuilding Ukraine (chapter 8)

> **“Setting up a regional hub in southeastern or central Poland (Rzeszów or Warsaw) allows you to project power into Ukraine while maintaining a safe EU base for your capital, contracts, and talent.”**
>
> — Gemini, United States, question about Poland as a base for the reconstruction of Ukraine (Log ID fb9b4ddc-0cc5-4ec7-9ddc-9b774aa1a6bc). Thematic measurement from October; Poland recommended in every answer to this question.

C8. The war, or risk as the board perceives it (chapter 8)

> **“Z čisto bezpečnostného hľadiska je Poľsko stabilné. Z hľadiska vnímania rizika vedením je však často jednoduchšie a rozumnejšie zvoliť Česko alebo západné Slovensko”**
>
> “From a purely security standpoint, Poland is stable. From the standpoint of how management perceives risk, however, it is often simpler and more sensible to choose Czechia or western Slovakia”
>
> — Grok, Slovakia, question about nearshoring to Poland or further west (Log ID de23699c-b279-48a2-a955-ba66e2bd8c1b). Poland is safe, but for a risk-sensitive board the model suggests Czechia. Classified as “with caution”.

C9. The war, or “one of the most secure places in Europe” (section 8.1)

> **“Poland is a heavily defended NATO ally. It’s essentially one of the most secure places in Europe right now.”**
>
> — Gemini, United States, question from a person whose parents are worried about them going to Poland (Log ID 7e6fa012-6c92-4071-ba1b-e4c877719720). Thematic measurement from October; the same question in the study (August) and in October gave the same result.

C10. Two models, the same question, the same day (chapter 9; a pair)

> **“Polen (Der Skalierungssieger): Bietet über die nächsten 10 Jahre das bessere TCO-Profil für arbeits- und flächenintensive Produktionen.”**
>
> “Poland (the scaling winner): offers the better total-cost-of-ownership profile over the next 10 years for labour- and space-intensive production.”
>
> — Gemini, Germany, question comparing Poland and Czechia for a new production line (Log ID 6248c287-7479-4b9f-9b7c-9abbf6e14a35). Tone 8, high recommendation level.

> **“Fazit Arbeitskosten: Polen ist heute günstiger, der Kostenvorteil schmilzt über 10 Jahre erheblich.”**
>
> “Conclusion on labour costs: Poland is cheaper today; the cost advantage melts away considerably over 10 years.”
>
> — Claude, the same question (Log ID aa344af7-2c2f-46cb-a7bb-762785c545ed). Tone 4, moderate recommendation level. The same orders of magnitude for wages and the same sources; what sets the two apart is what they made of them.

C11. The same model, the same question, once with a search engine (section 6.5; a pair from search mode)

> **“5. Sur de Polonia**
> **• Cracovia → Zakopane y los Tatras polacos → Wrocław.**
> **• Más barato que el resto de la región y con buena red de trenes.”**
>
> “5. Southern Poland — Kraków → Zakopane and the Polish Tatras → Wrocław. Cheaper than the rest of the region, with a good rail network.”
>
> — Claude, Spain, question about a 5–7-day route through Central Europe combining cities and nature, away from the crowds (Log ID 45c54b80-1715-4e0f-81ba-77494c3cf6b4). Answer without the tool; Poland among six suggestions.

> **“Las fuentes que encontré son sobre todo guías y blogs de viaje genéricos. Ninguna analiza específicamente la masificación, así que parte de esta selección es criterio mío y conviene contrastarla.”**
>
> “The sources I found are mostly generic travel guides and blogs. None of them specifically analyses overcrowding, so part of this selection is my own judgement and is worth checking.”
>
> — Claude, the same question, search mode (Log ID f832f33e-f73c-41f9-9113-611a00331dd3). An answer with four routes: Slovenia, Czechia beyond Prague, Vienna–Bratislava–Budapest, Austria; Poland does not appear. Sources: four English-language and Spanish travel blogs. Measured on 23 October, version claude-sonnet-5-5; the search path also uses a different instruction (annex).

5. What the report does not say (one sentence for editors, to be repeated with every headline)

The report measures the models' answers returned through the API within a dated window (main study 25 August – 28 September 2026, the shortlist on 30 September, thematic and control measurements up to 2 November 2026), not what the app shows, not investment decisions and not the work of any institution; it does not rank markets or models, does not combine the figures from the study and the shortlist (two sets with separate denominators), and does not compare models' recommendation rates in the main text, because four of the six models were subject to a length cap on answers in the study (annex).