

Economic Survey 2018
Poland in the eyes of foreign investors

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of Chambers of Commerce

International Group of Chambers of Commerce in Poland

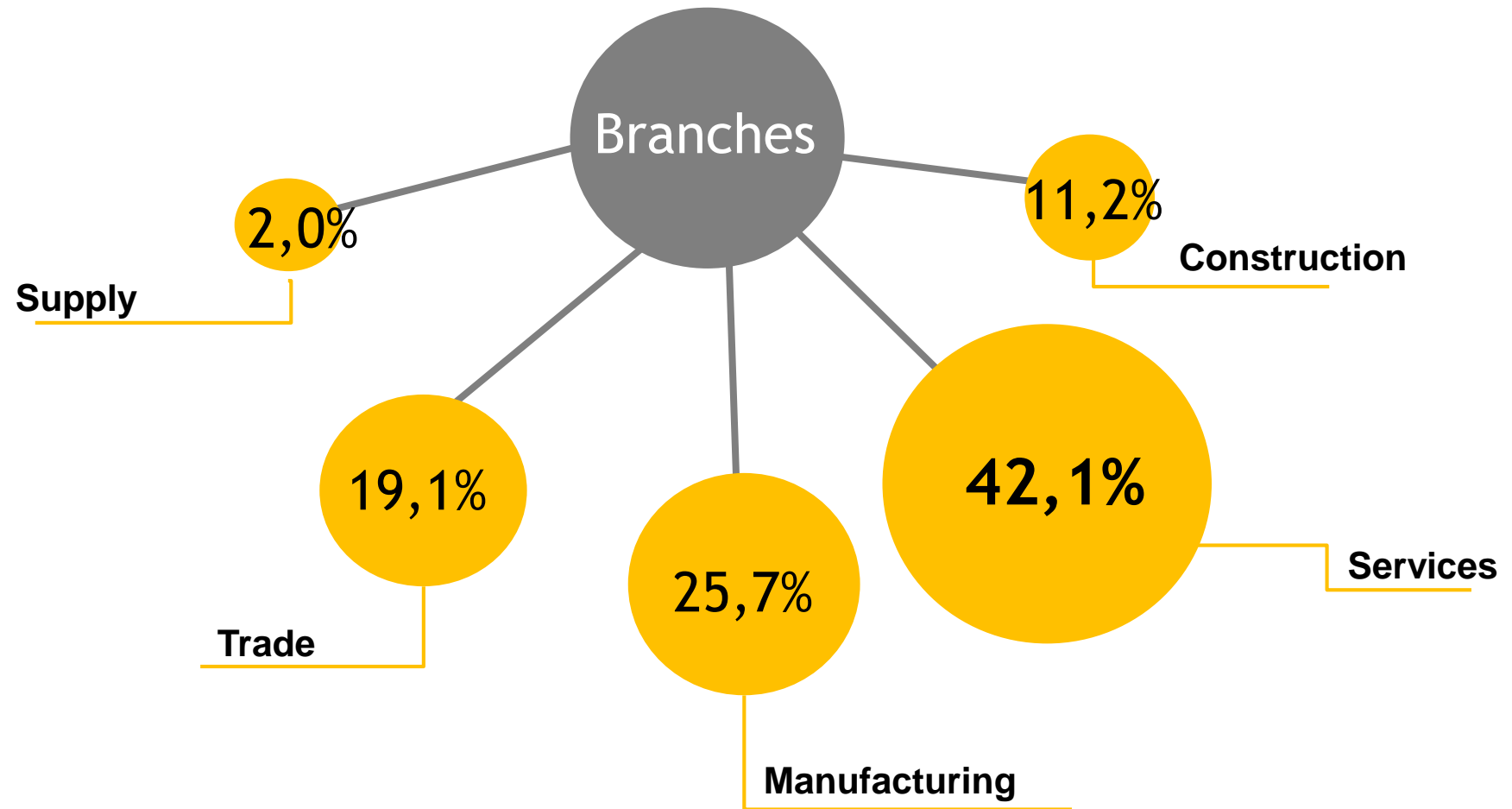




Part I

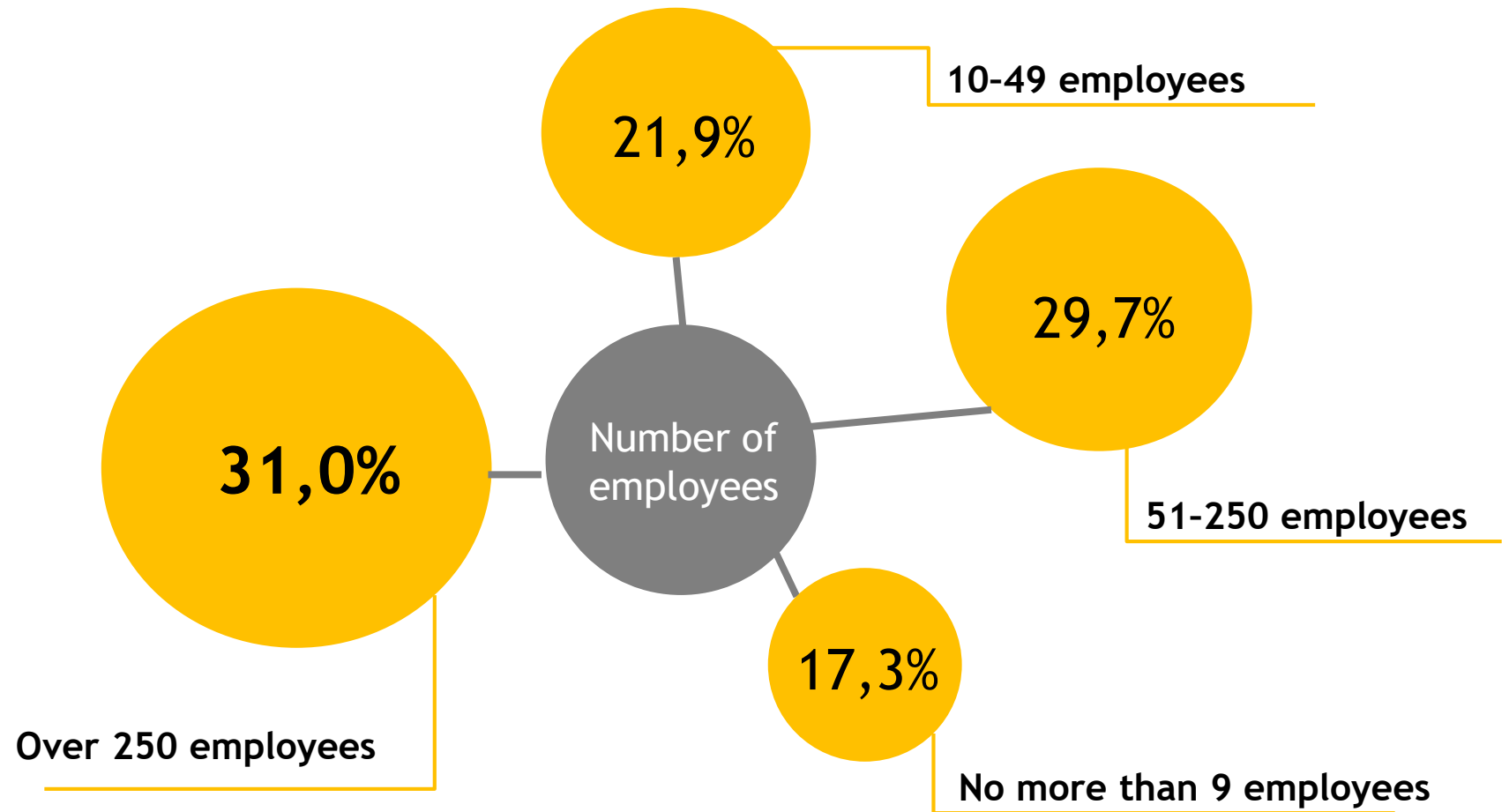
Characteristics of the surveyed
companies

Structure of respondents - branches.



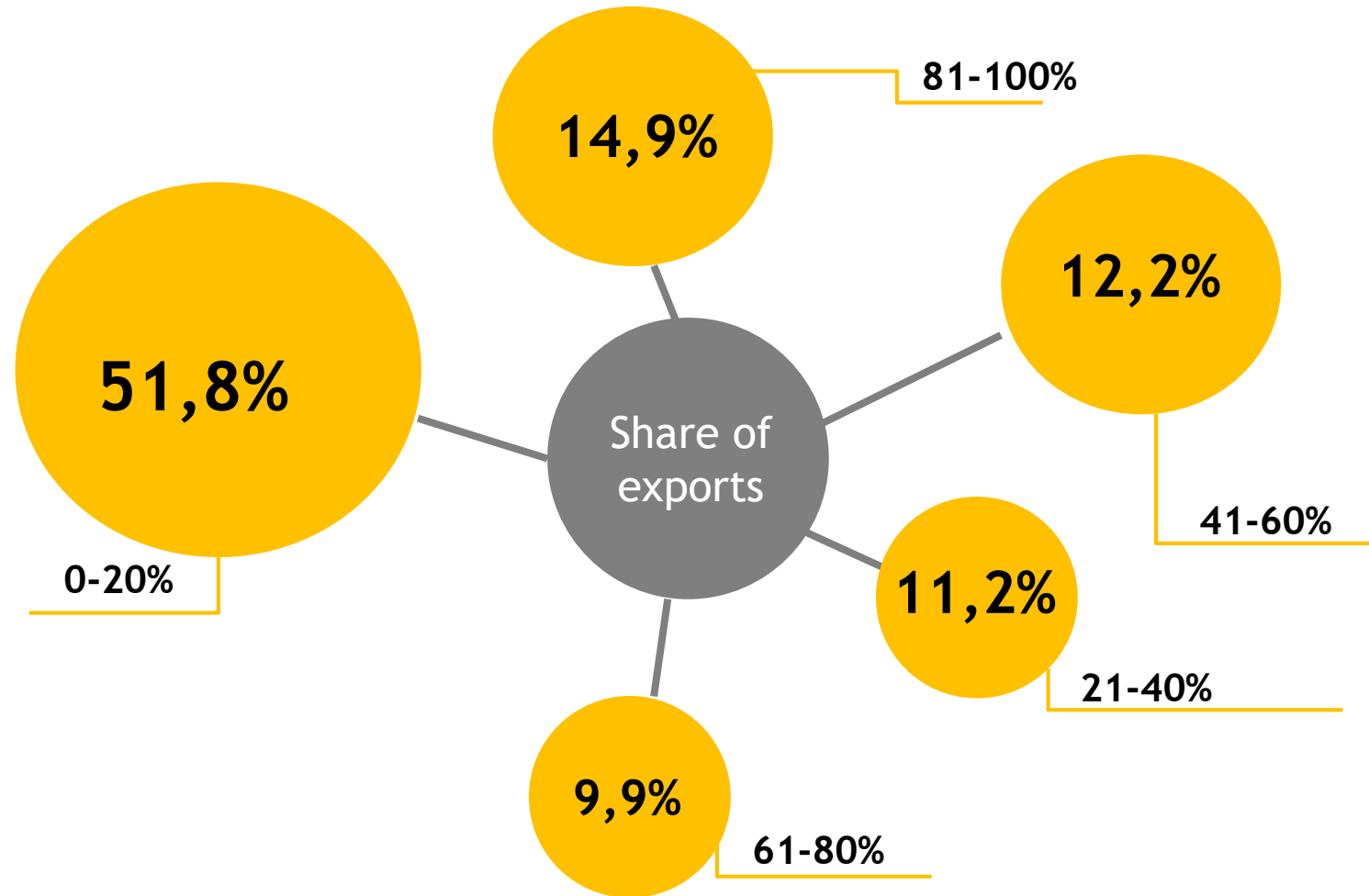
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Structure of respondents - number of employees.

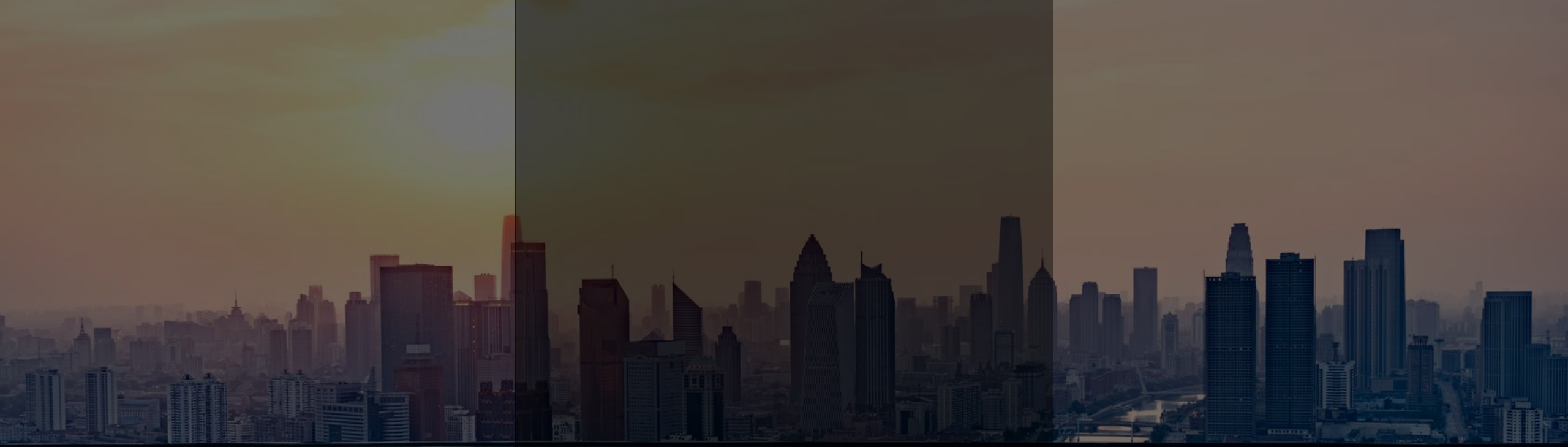


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Structure of respondents - share of exports in total turnover.



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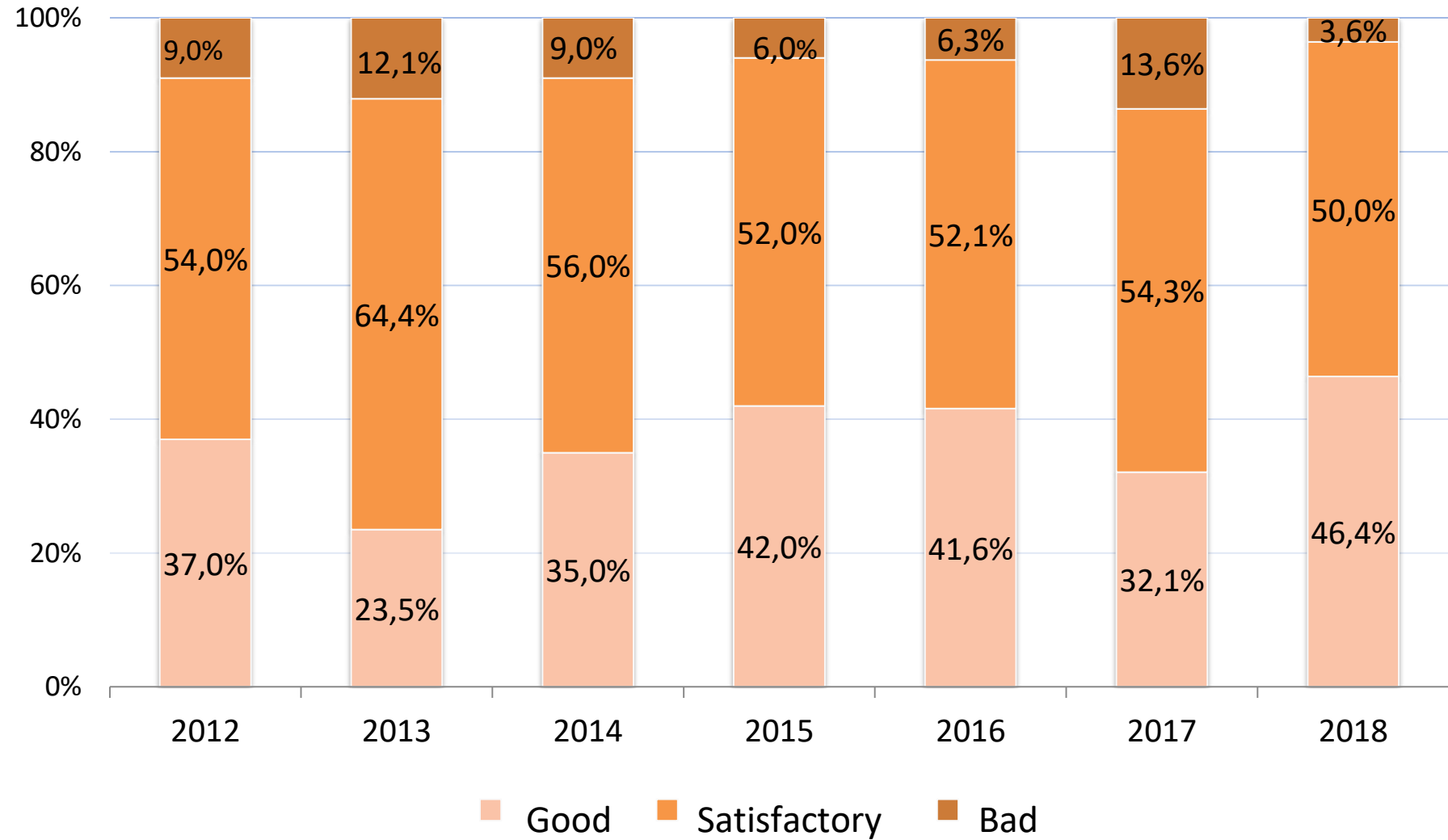
Part II

Economic situation in Poland

How do you evaluate the current state of the Polish economy?

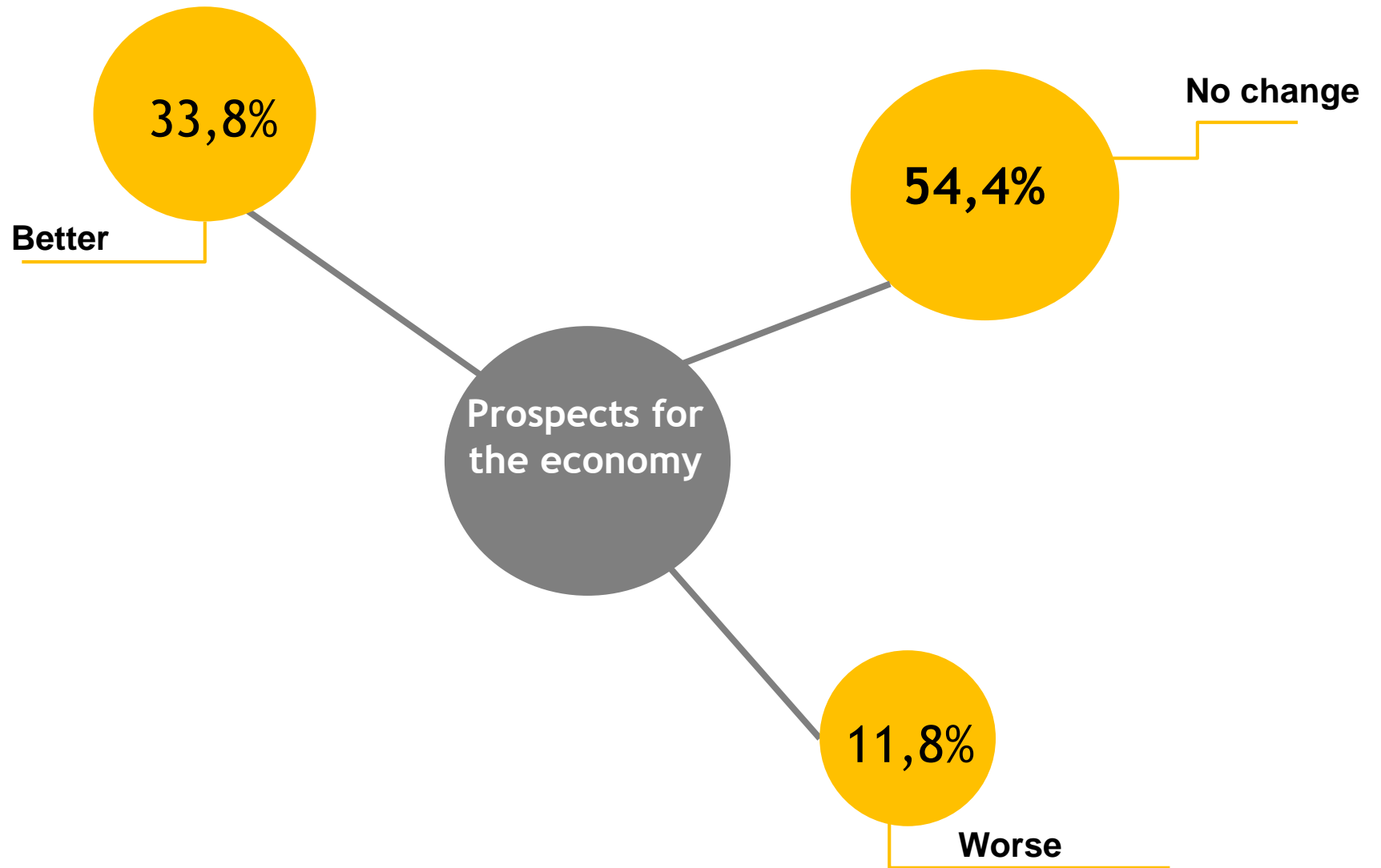
Comparison to the previous editions of the survey

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What are the prospects for the Polish economy in 2018 compared to 2017?

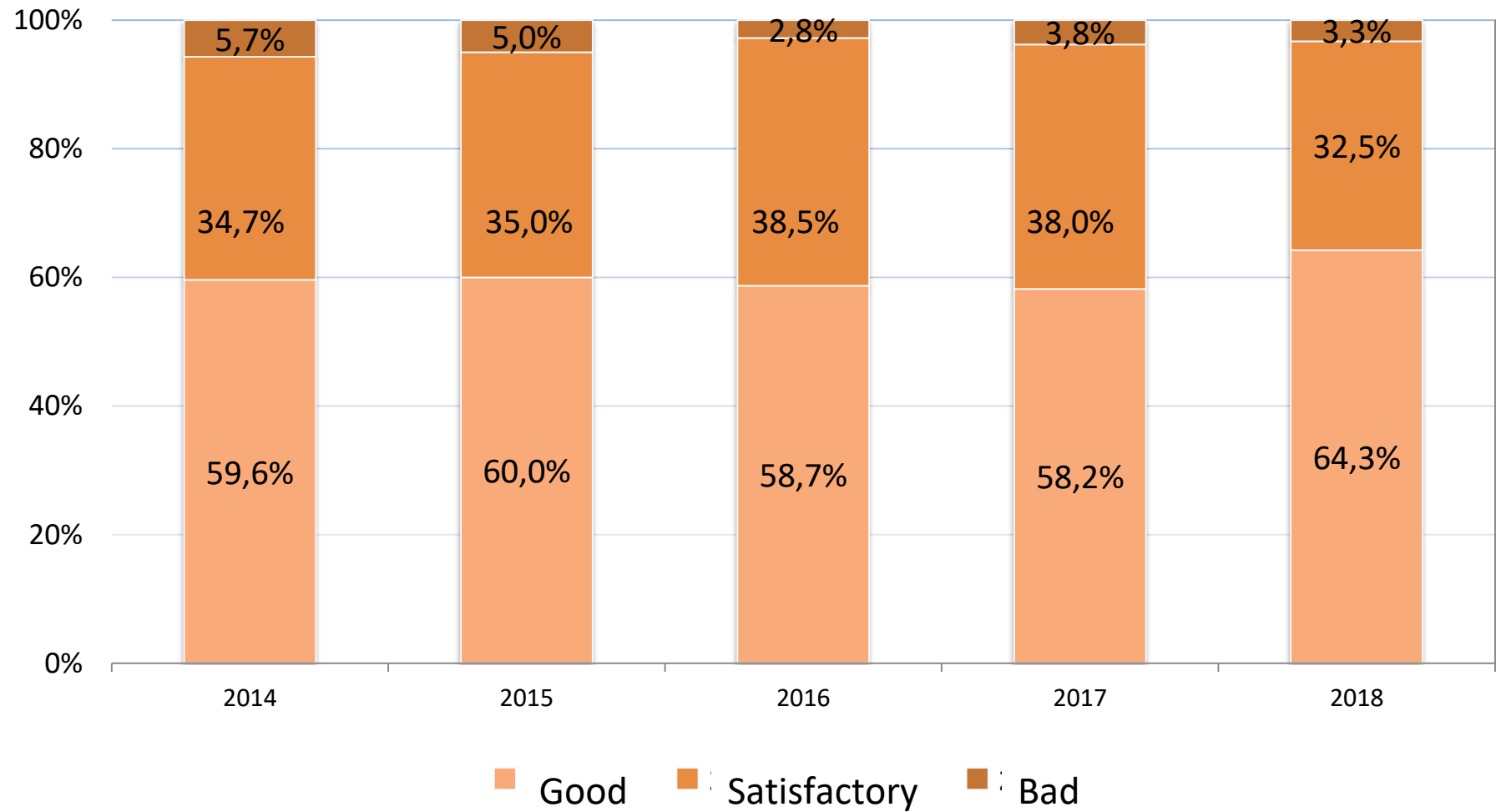
Economic Survey
2018



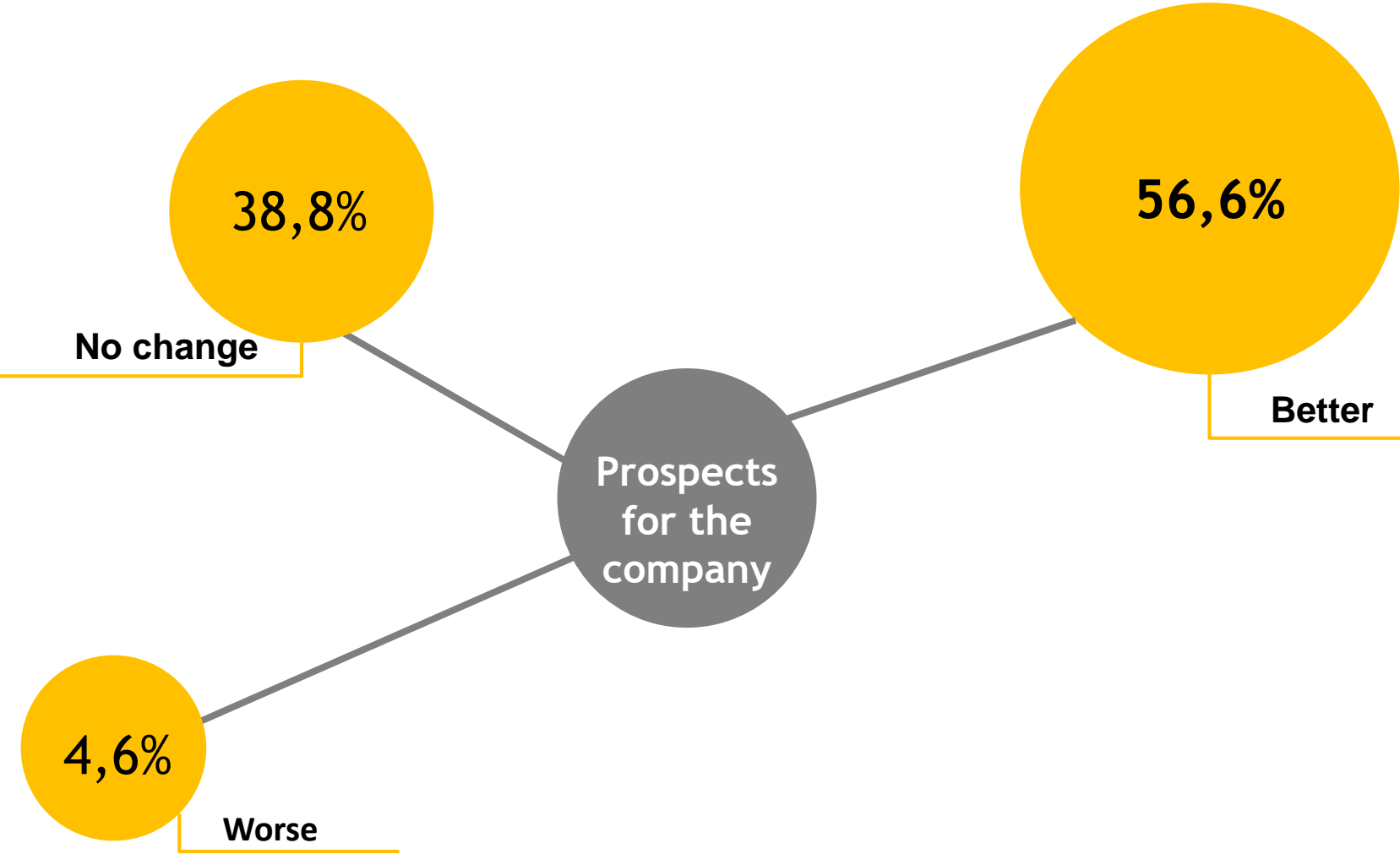
How do you evaluate the current economic situation of your company?

Comparison to the previous editions of the survey

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2018



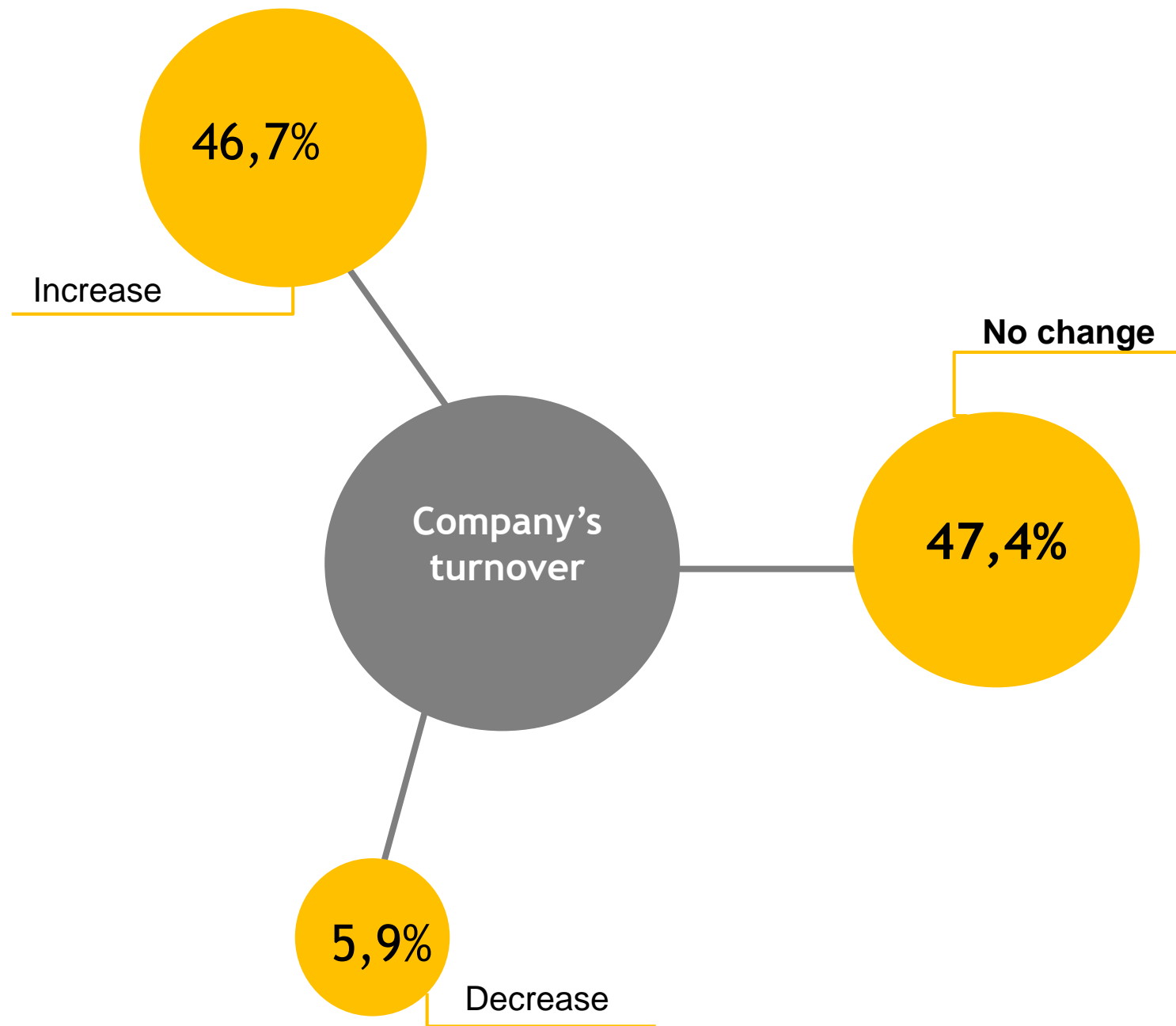
What are the prospects for your company in 2018 compared to 2017?



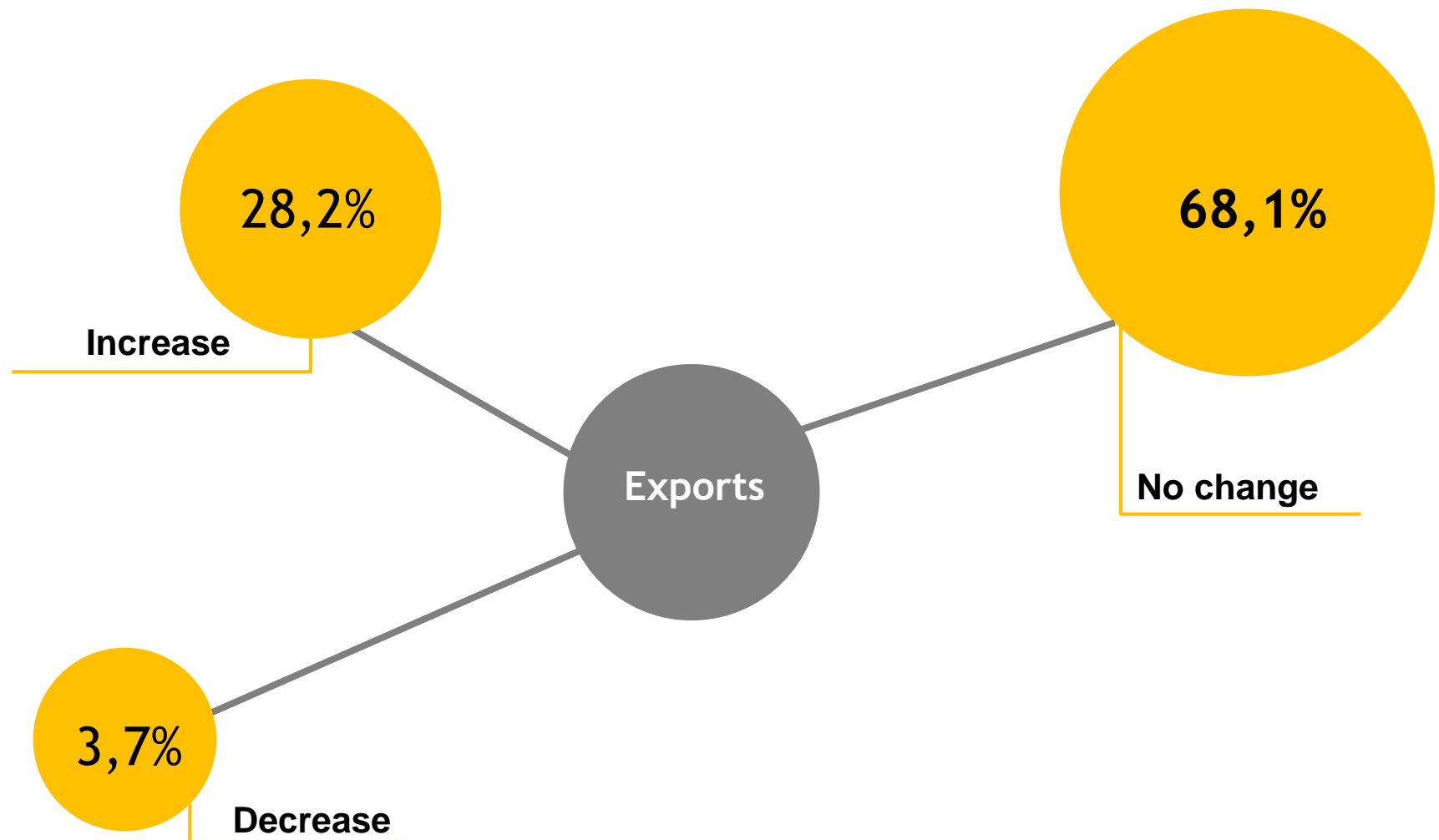
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What are the prospects for your company's turnover in 2018 compared to 2017?

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What are the prospects for your company's exports in 2018 compared to 2017?

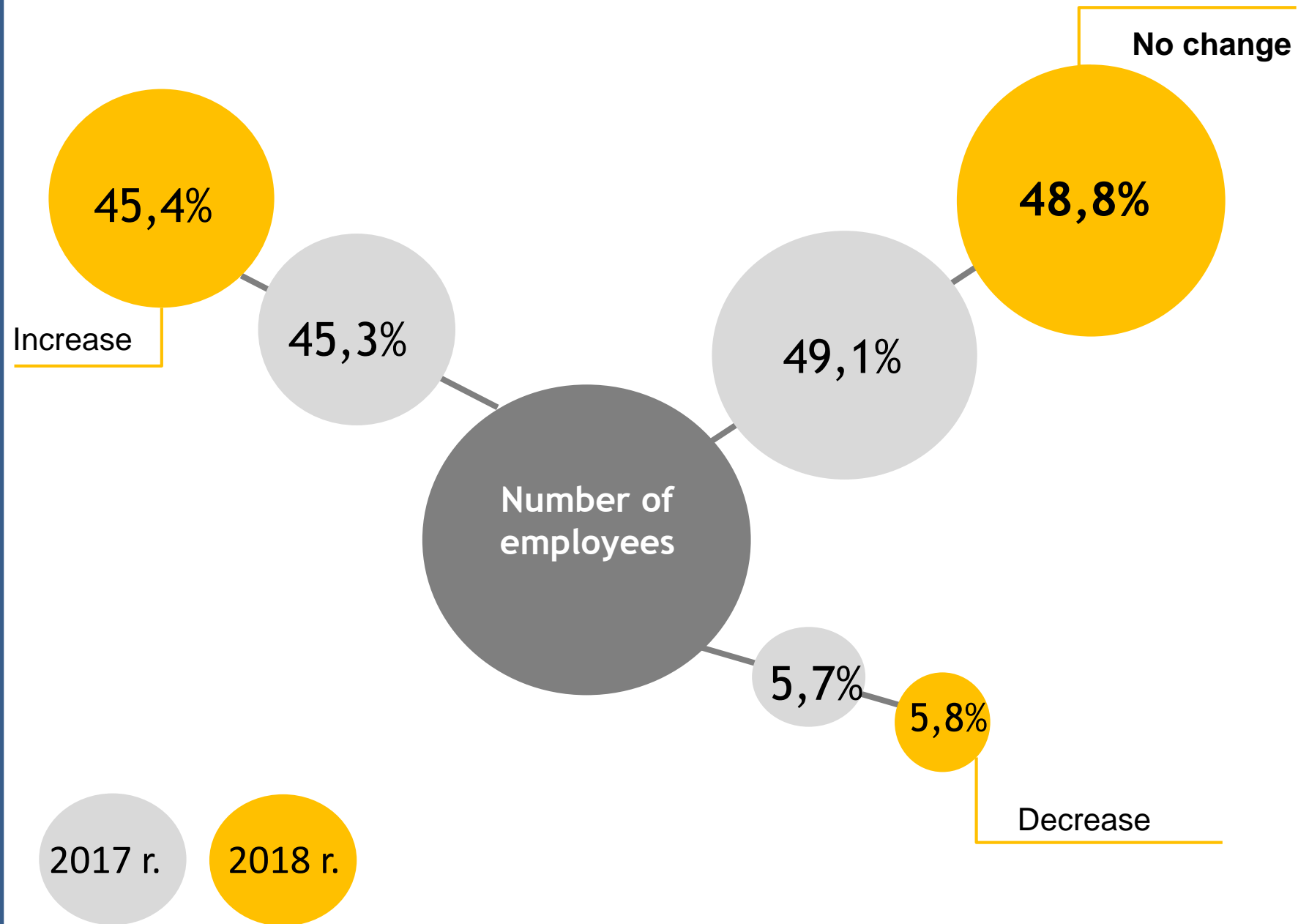


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What are the prospects for your company's number of employees in 2018 compared to 2017?

Comparison to the previous edition of the survey

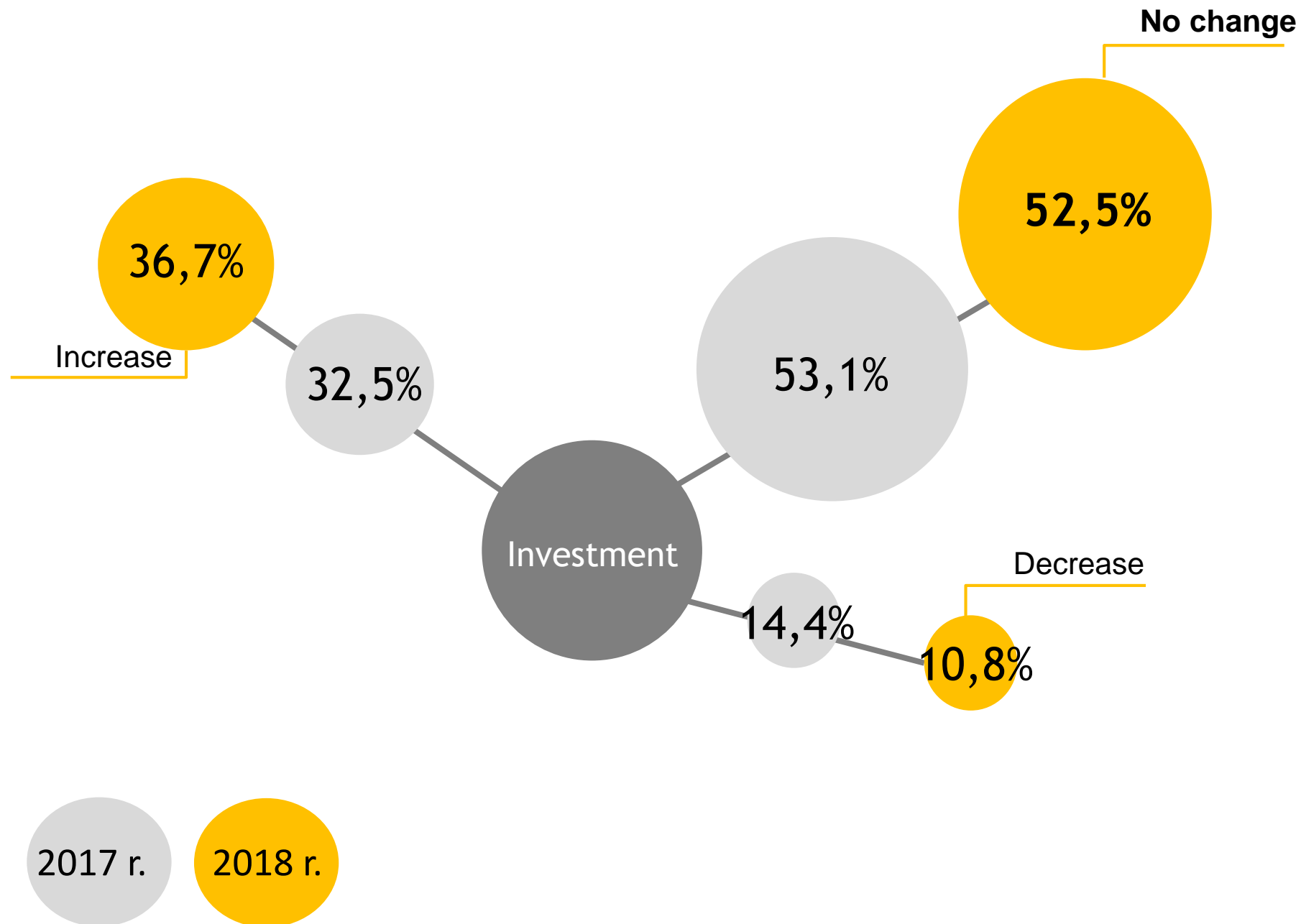
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What are the prospects for your company's expenditure on investment in 2018 compared to 2017?

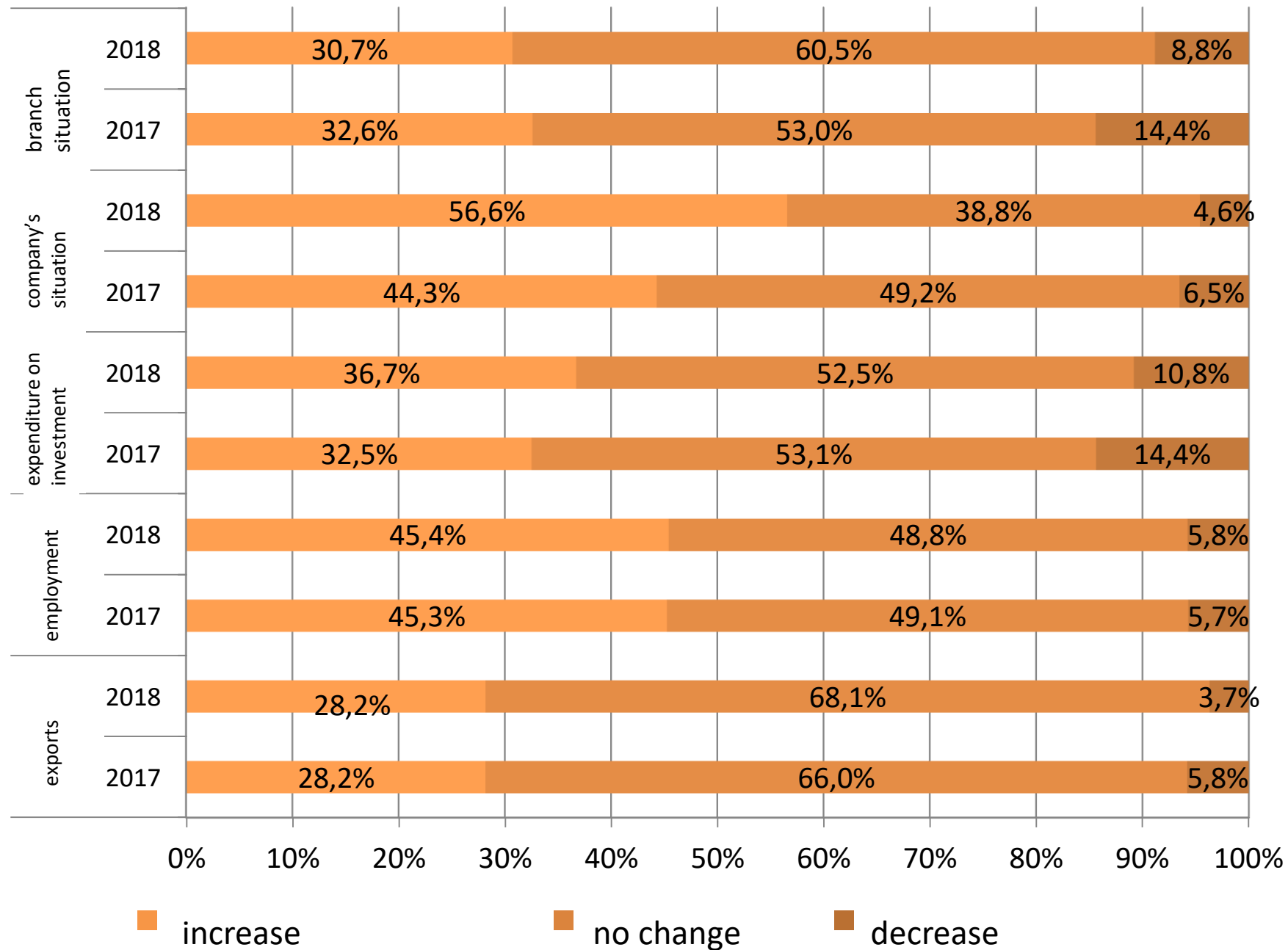
Comparison to the previous edition of the survey

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Prospects for the companies in 2018 and 2017

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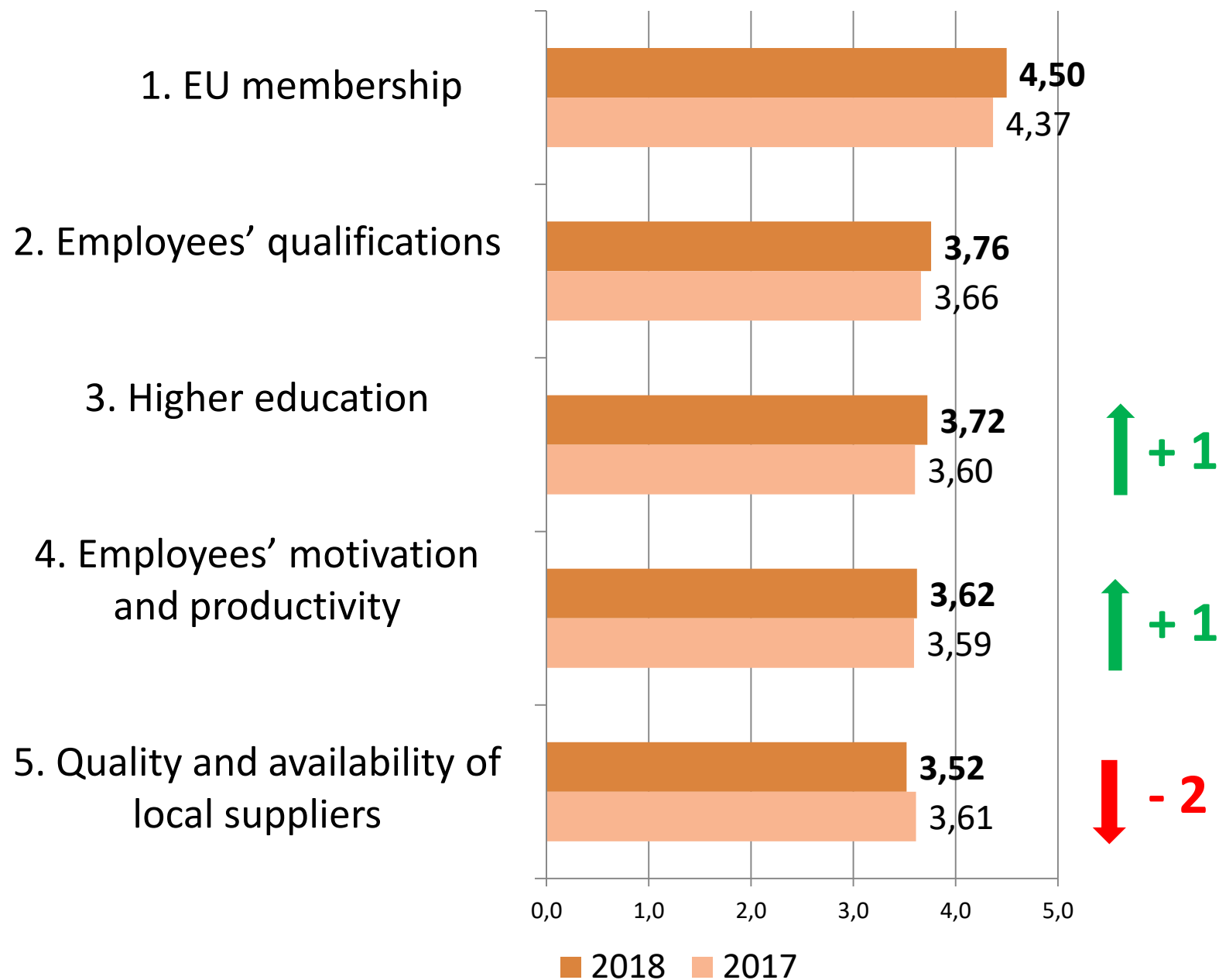


Part III

Investment factors

Evaluation of investment factors (points and change of rank 2017/2018 1 - min; 5 - max)

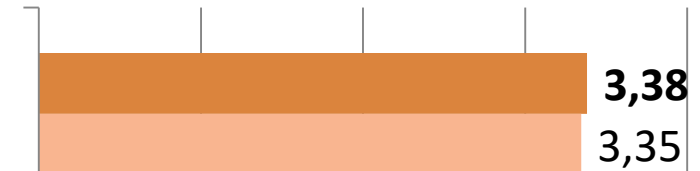
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Evaluation of investment factors (points and change of rank 2017/2018 1 - min; 5 - max)

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6. Infrastructure (transport, communication, IT, energy)



7. Payment morale



8. R&D environment



↑ + 1

9. Labour costs



↓ - 1

10. Access to state or EU funding



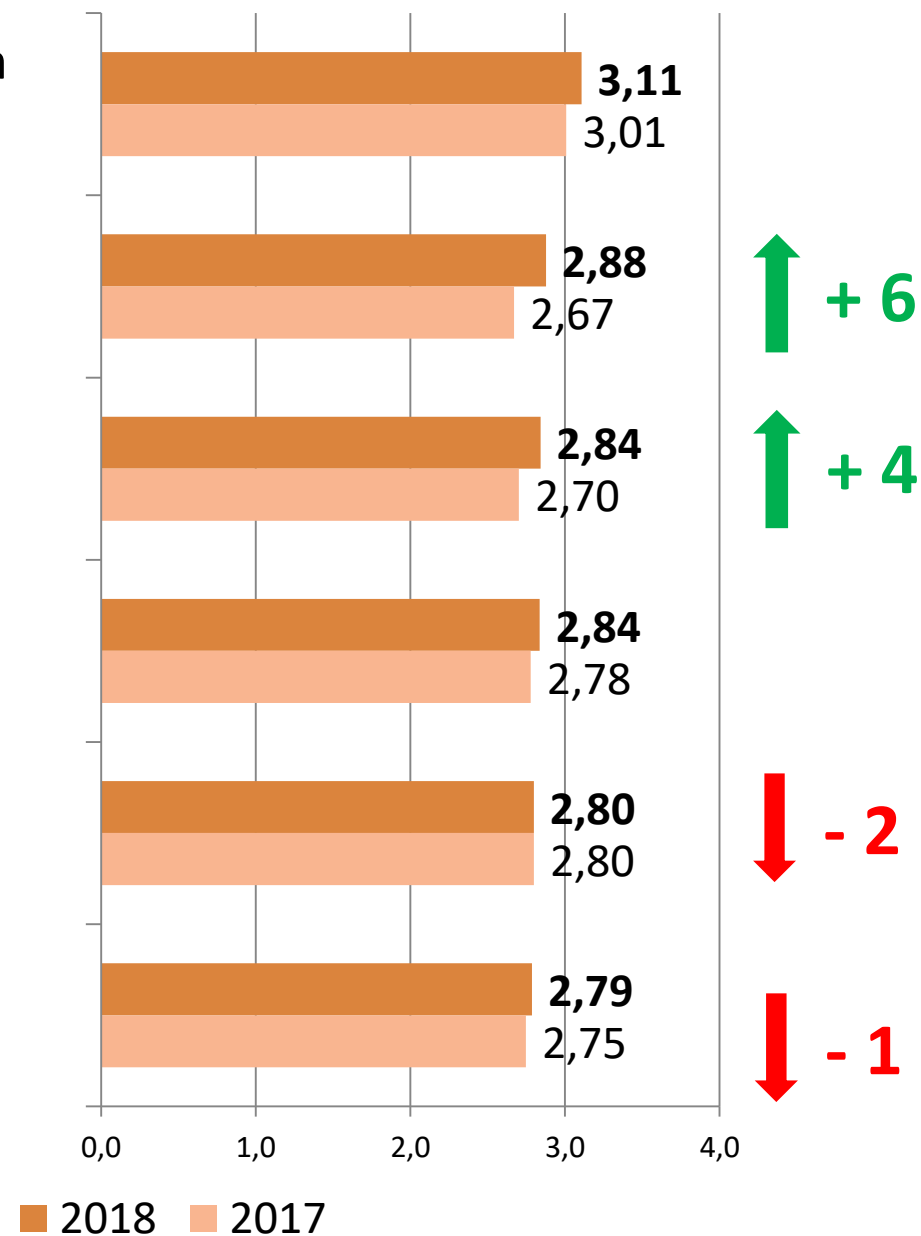
0,0 1,0 2,0 3,0 4,0

■ 2018 ■ 2017

Evaluation of investment factors (points and change of rank 2017/2018 1 - min; 5 - max)

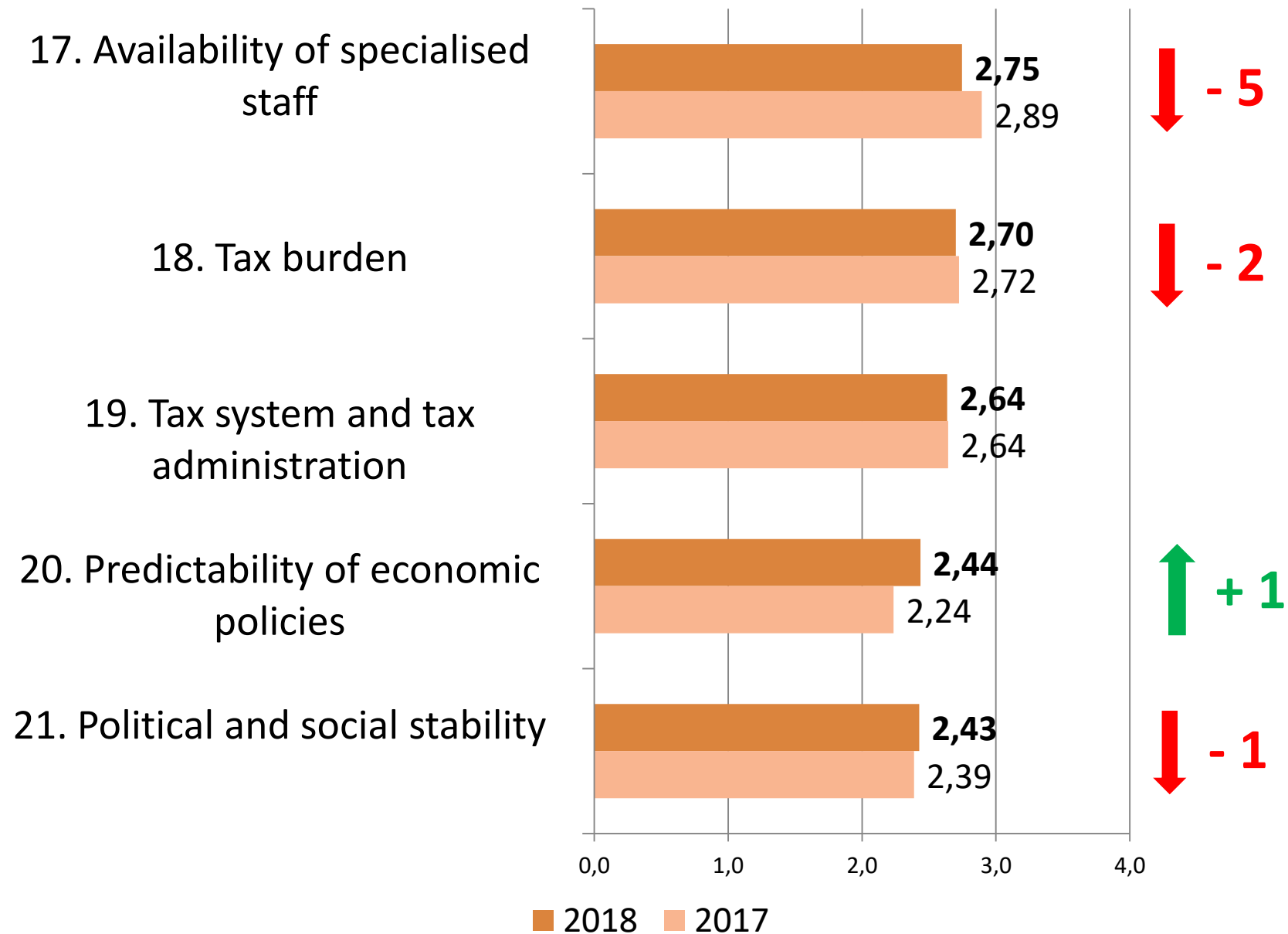
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- 11. Fight against corruption and crime
- 12. Adequacy of vocational training
- 13. Legal flexibility of employment
- 14. Public administration
- 15. Transparency of open invitations to tender
- 16. Legal safety



Evaluation of investment factors (points and change of rank 2017/2018 1 - min; 5 - max)

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Evaluation of investment factors (points and change of rank 2017/2018
1 - min; 5 - max)

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Adequacy of vocational training



18. position 2017 + 6 12. position 2018

Legal flexibility of employment



17. position 2017 + 4 13. position 2018

Availability of specialised staff



12. position 2017 - 5 17. position 2018

Quality and availability of local suppliers



3. position 2017 - 2 5. position 2018

Transparency of open invitations to tender



13. position 2017 - 2 15. position 2018

Tax burden



16. position 2017 - 2 18. position 2018

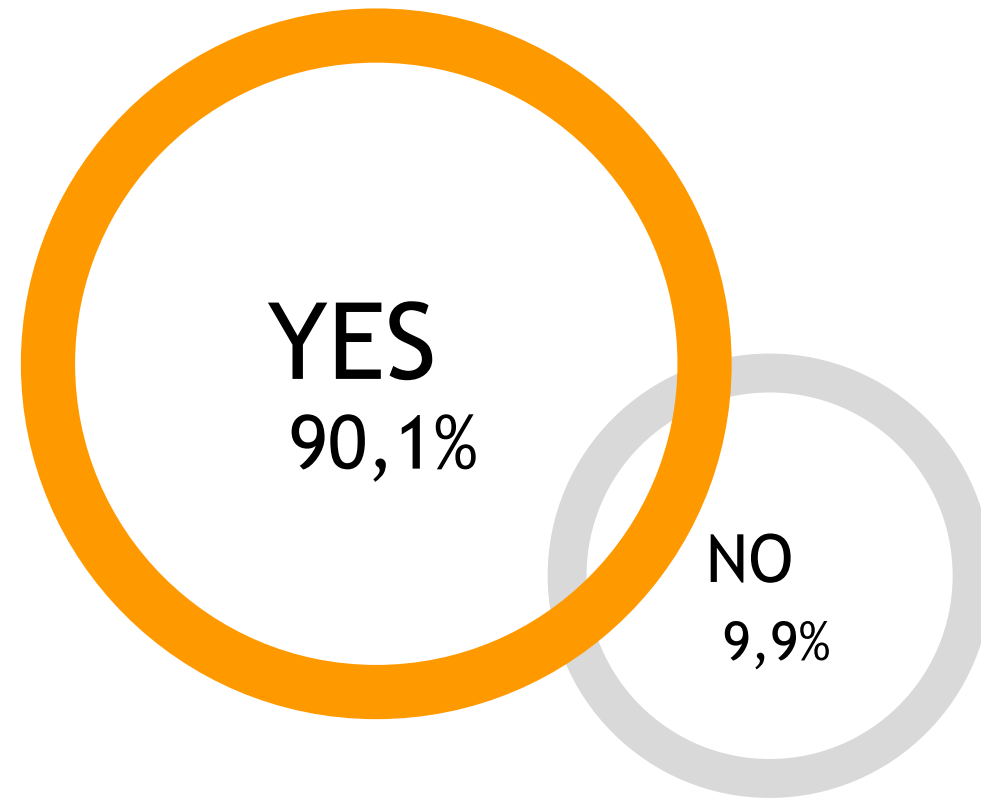


Part IV

Investment attractiveness

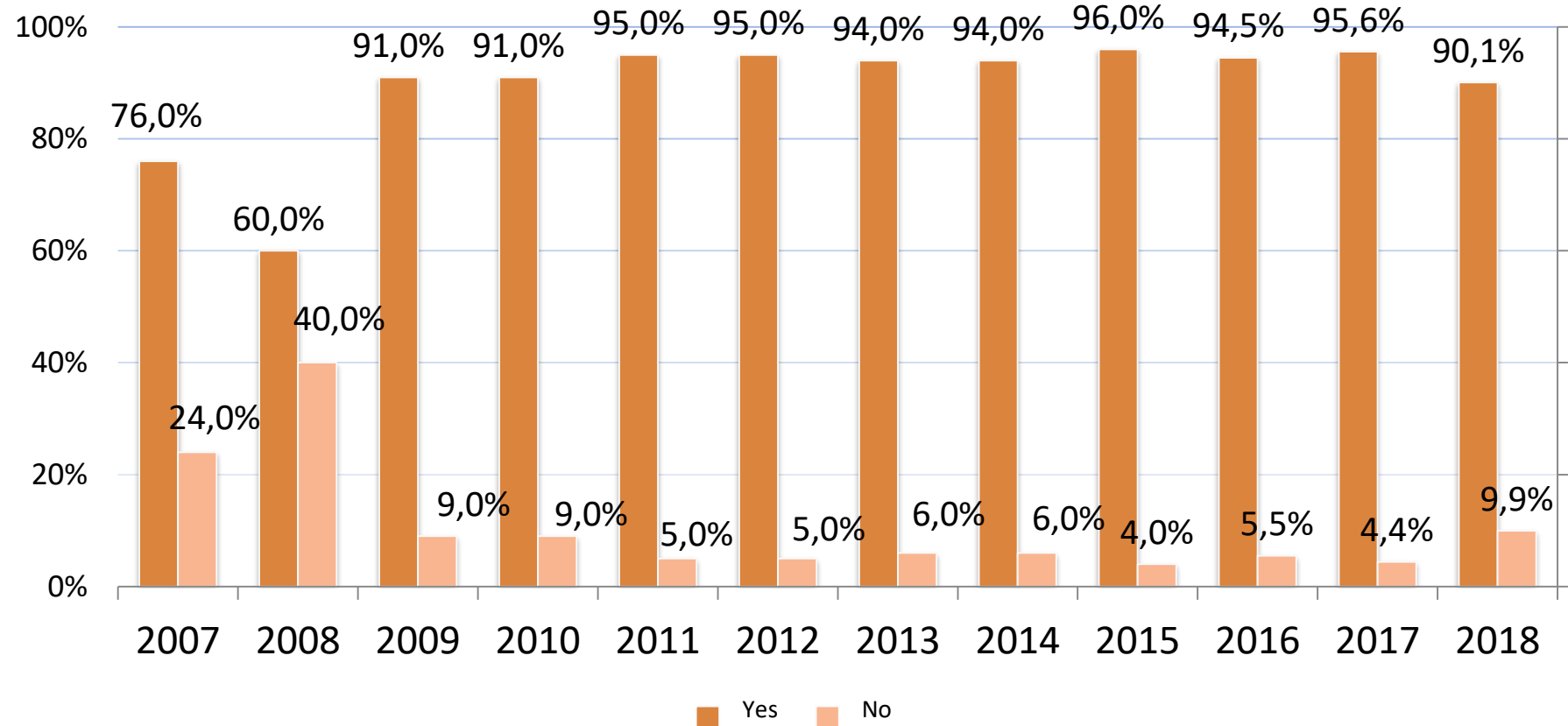
Would you invest
in Poland again?

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Would you invest in Poland again?

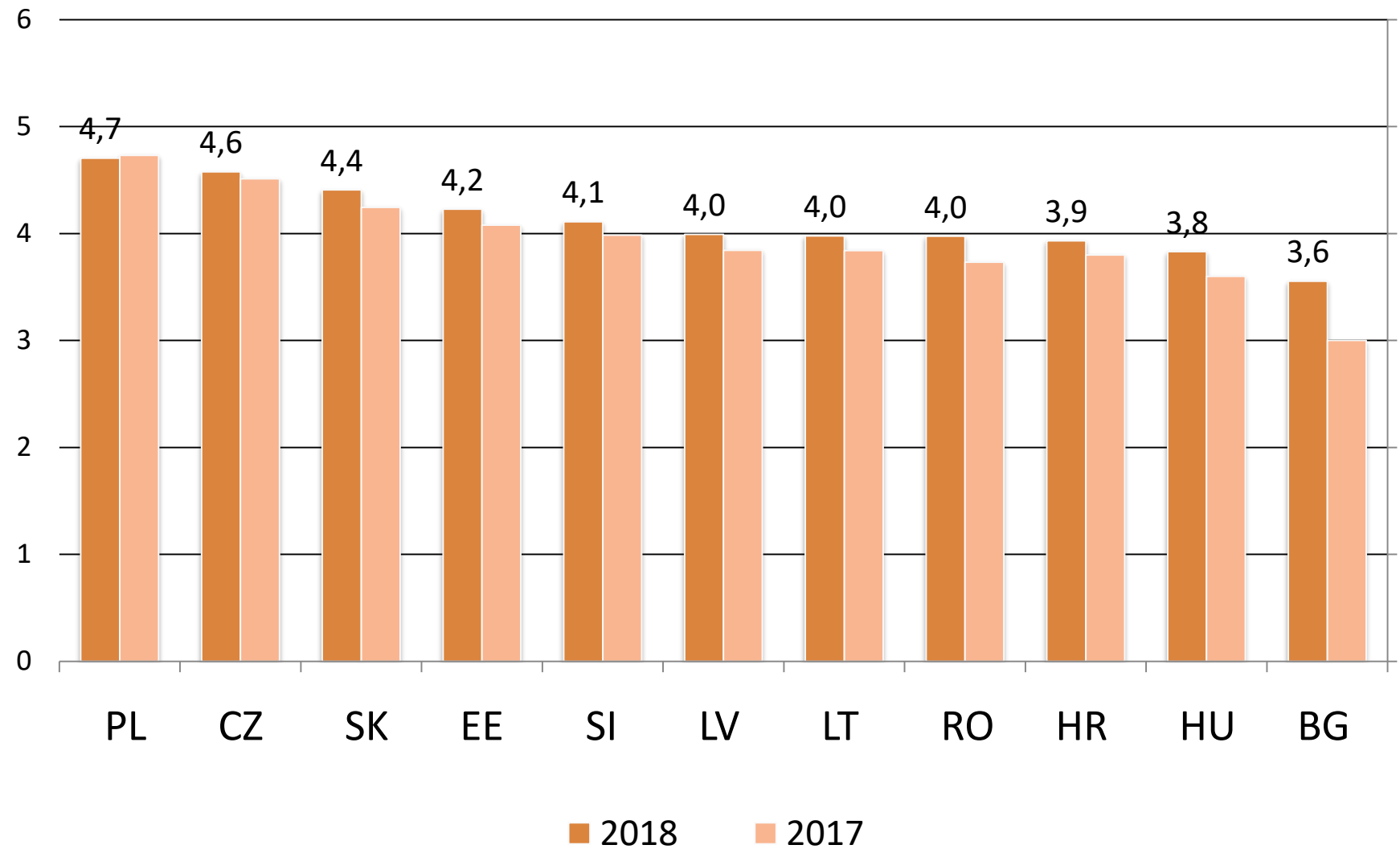
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Investment attractiveness of CEE countries in 2018 according to 300 investors from Poland

6 - very attractive
1 - not attractive at all

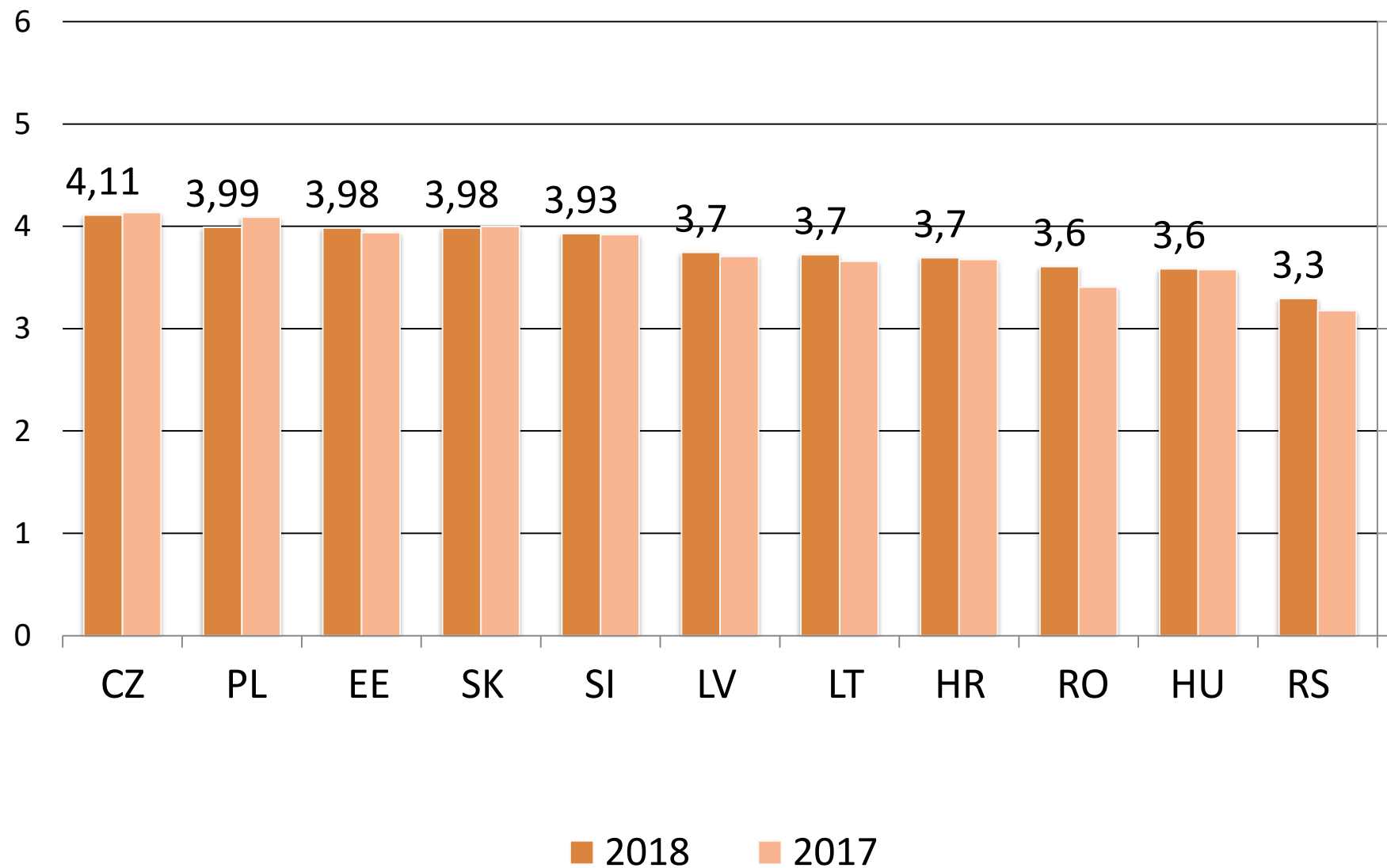
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Investment attractiveness of CEE countries in 2018 according to 1700 investors from the region

6 - very attractive
1 - not attractive at all

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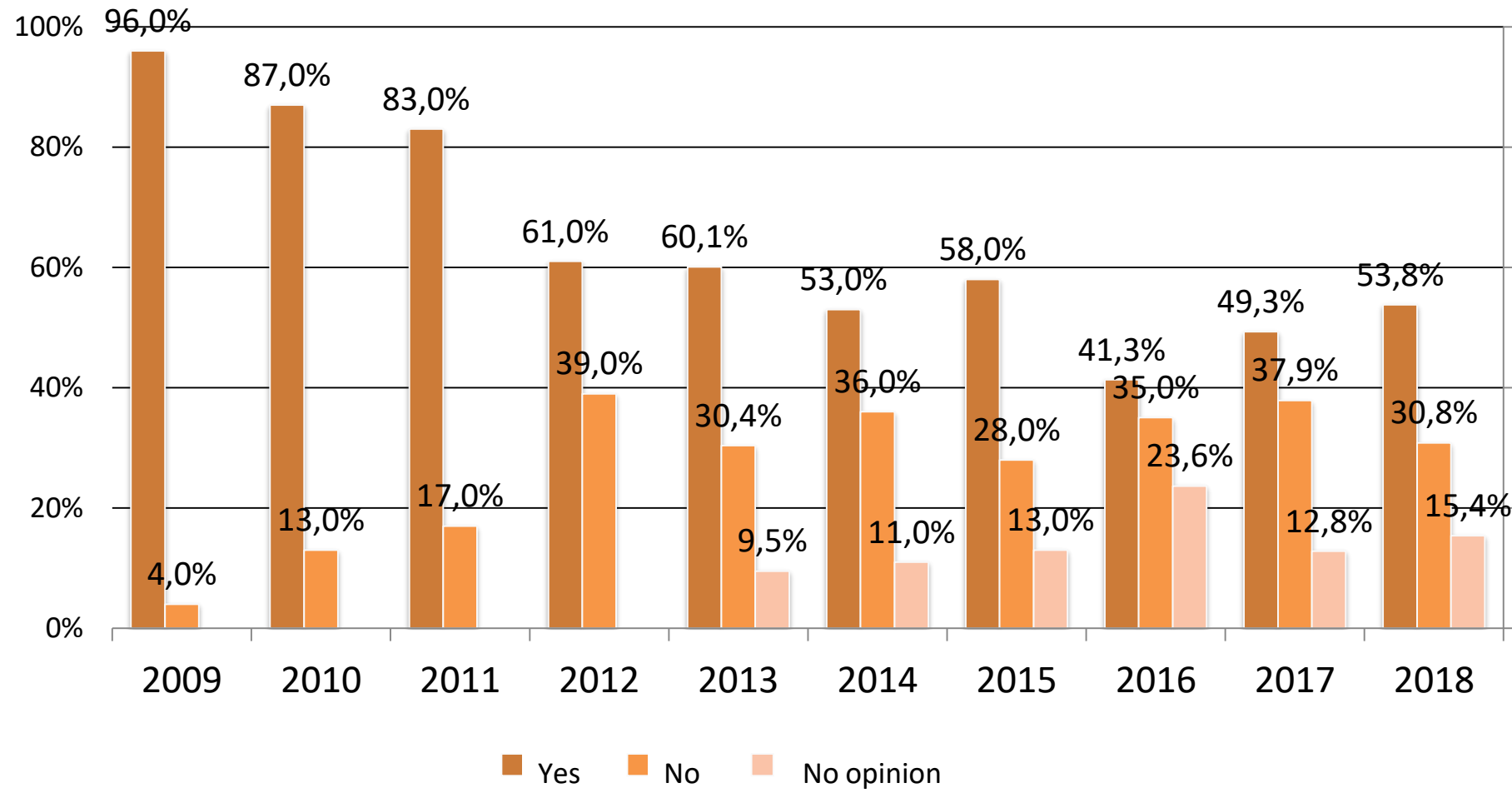
Investment attractiveness of CEE countries according to investors from the whole region

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Country	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
Czechia	1	1	1	2	2	2	1	1	1	1
Poland	2	2	2	1	1	1	2	2	2	4
Estonia	3	4	4	3	3	3	4	5	8	6
Slovakia	4	3	3	4	4	4	3	4	4	2
Slovenia	5	5	5	5	5	5	5	3	3	3
Latvia	6	6	6	6	6	7	8	9	13	11
Lithuania	7	8	7	7	7	8	9	6	10	10
Croatia	8	7	8	8	8	6	6	7	5	5
Romania	9	10	10	10	11	11	10	11	9	8
Hungary	10	9	9	9	9	10	13	10	7	9
Serbia	11	11	11	11	12	12	11	12	11	13

Are you in favour of introducing the Euro in Poland?

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Thank you for your attention!



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