

Economic Survey 2018
Poland in the eyes of foreign investors

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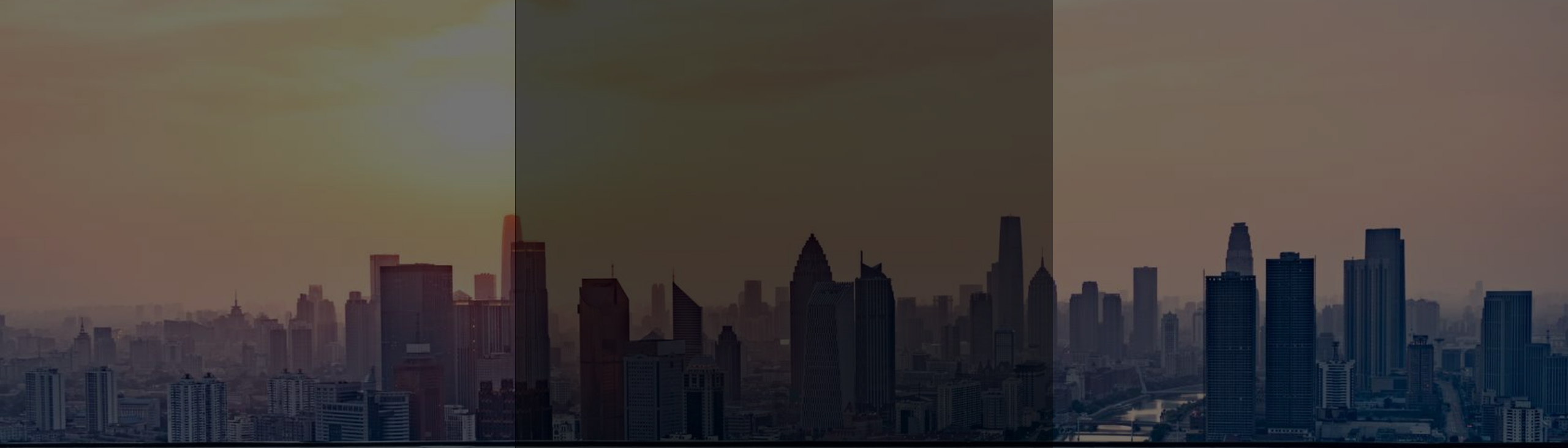


IGCC

International Group
of Chambers of Commerce

International Group of Chambers of Commerce in Poland

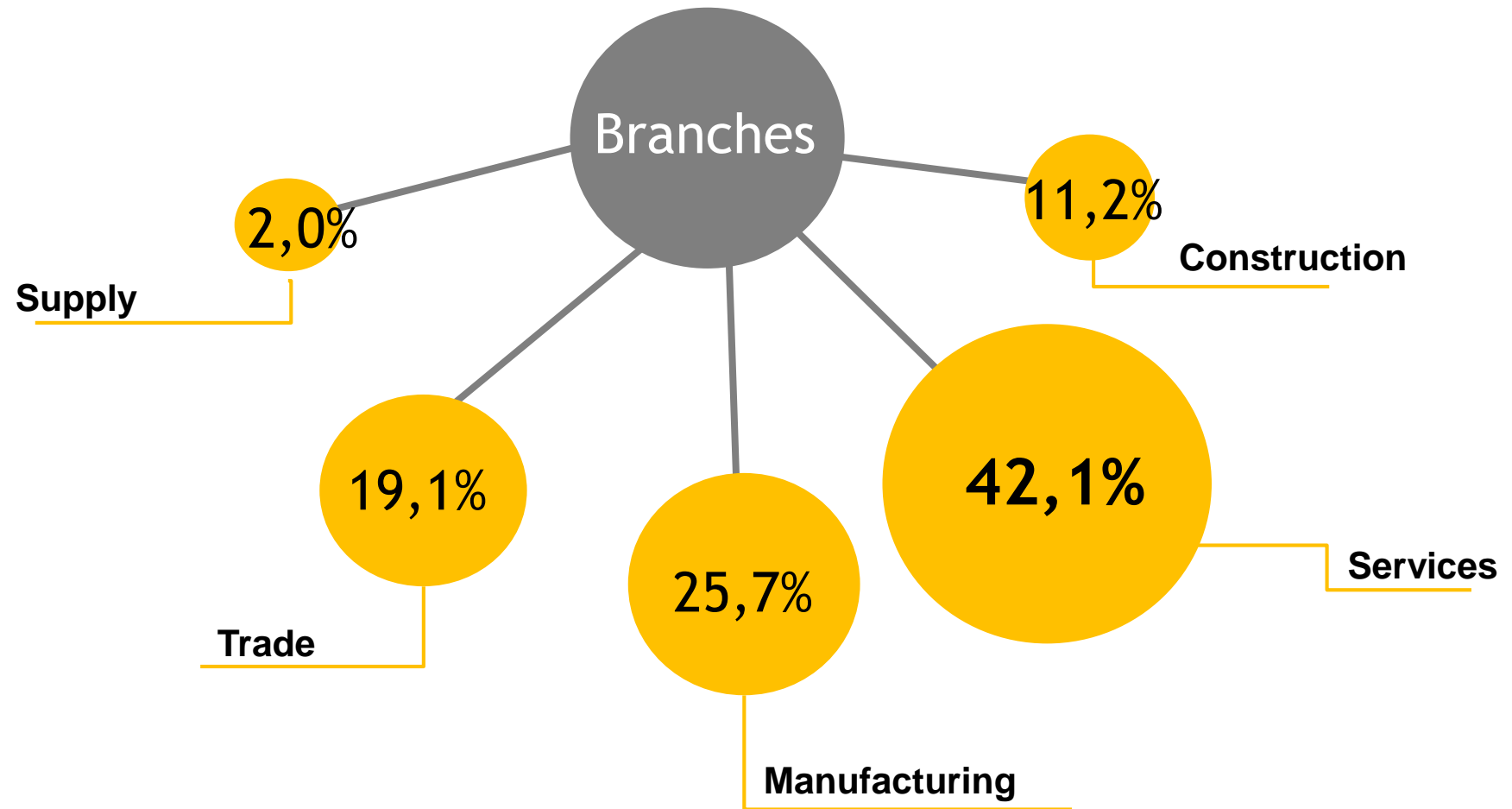




Part I

Characteristics of the surveyed
companies

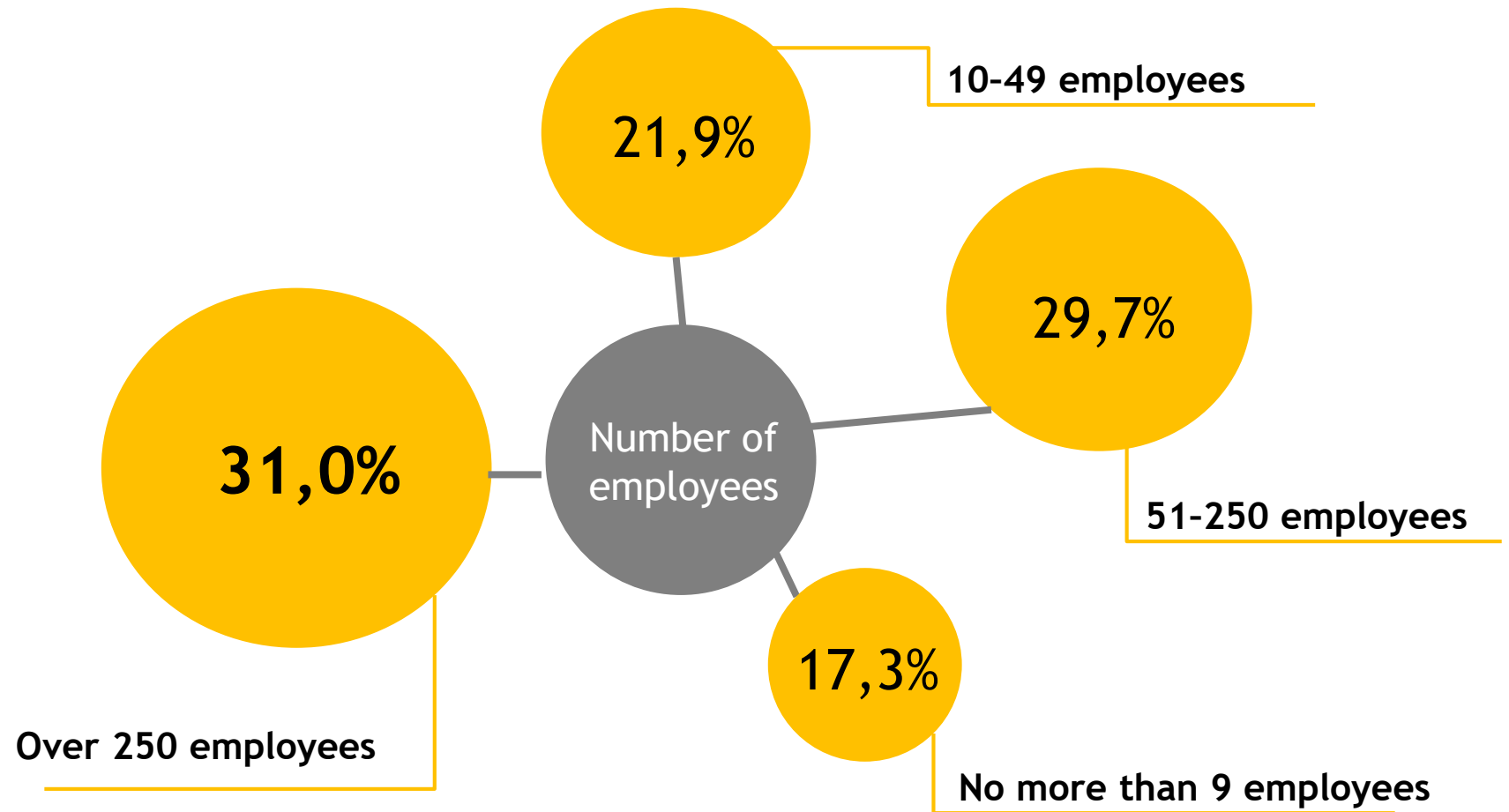
Structure of respondents - branches.



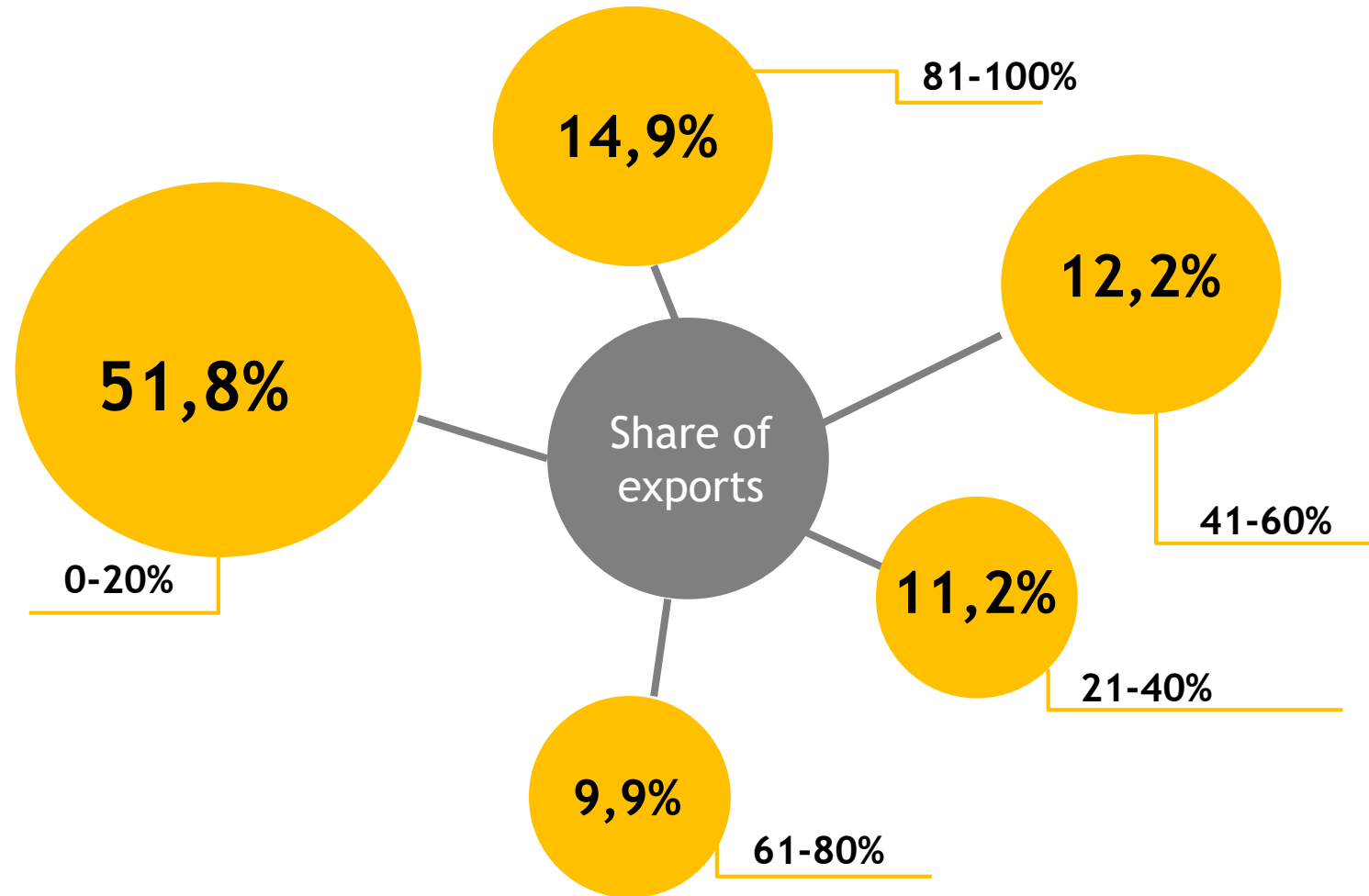
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Structure of respondents - number of employees.

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Structure of respondents - share of exports in total turnover.



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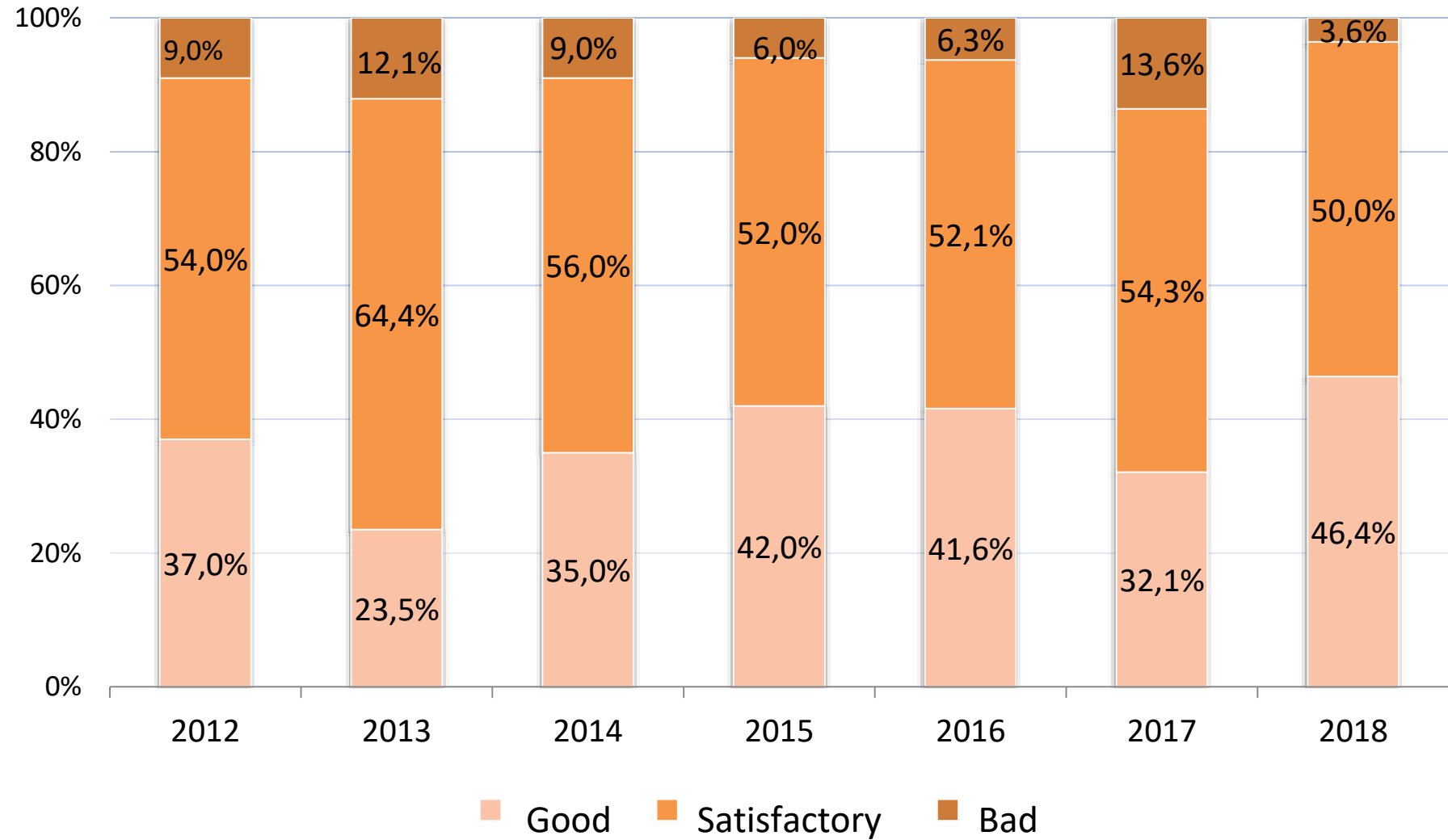
Part II

Economic situation in Poland

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

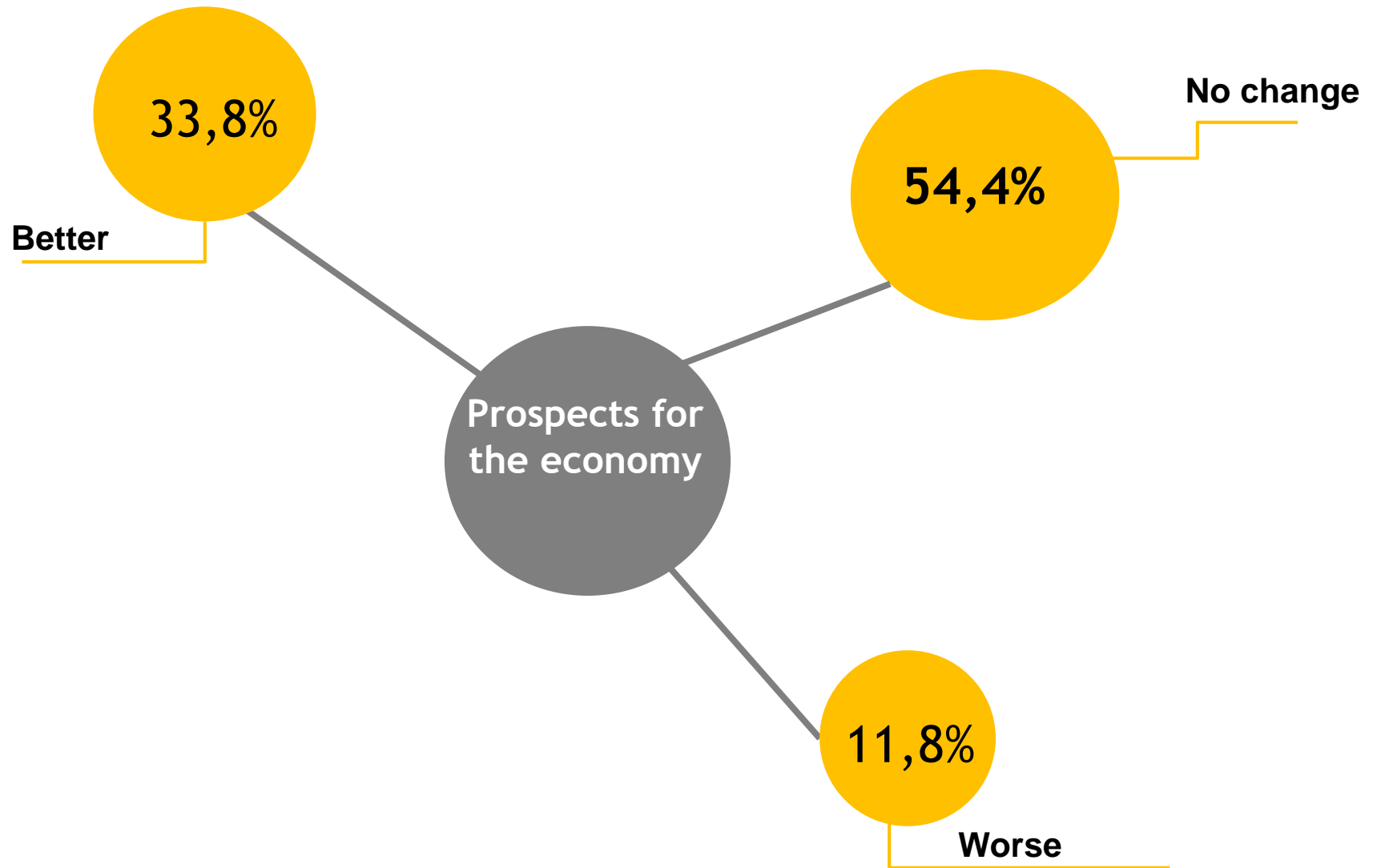
Comparison to the previous editions of the survey

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

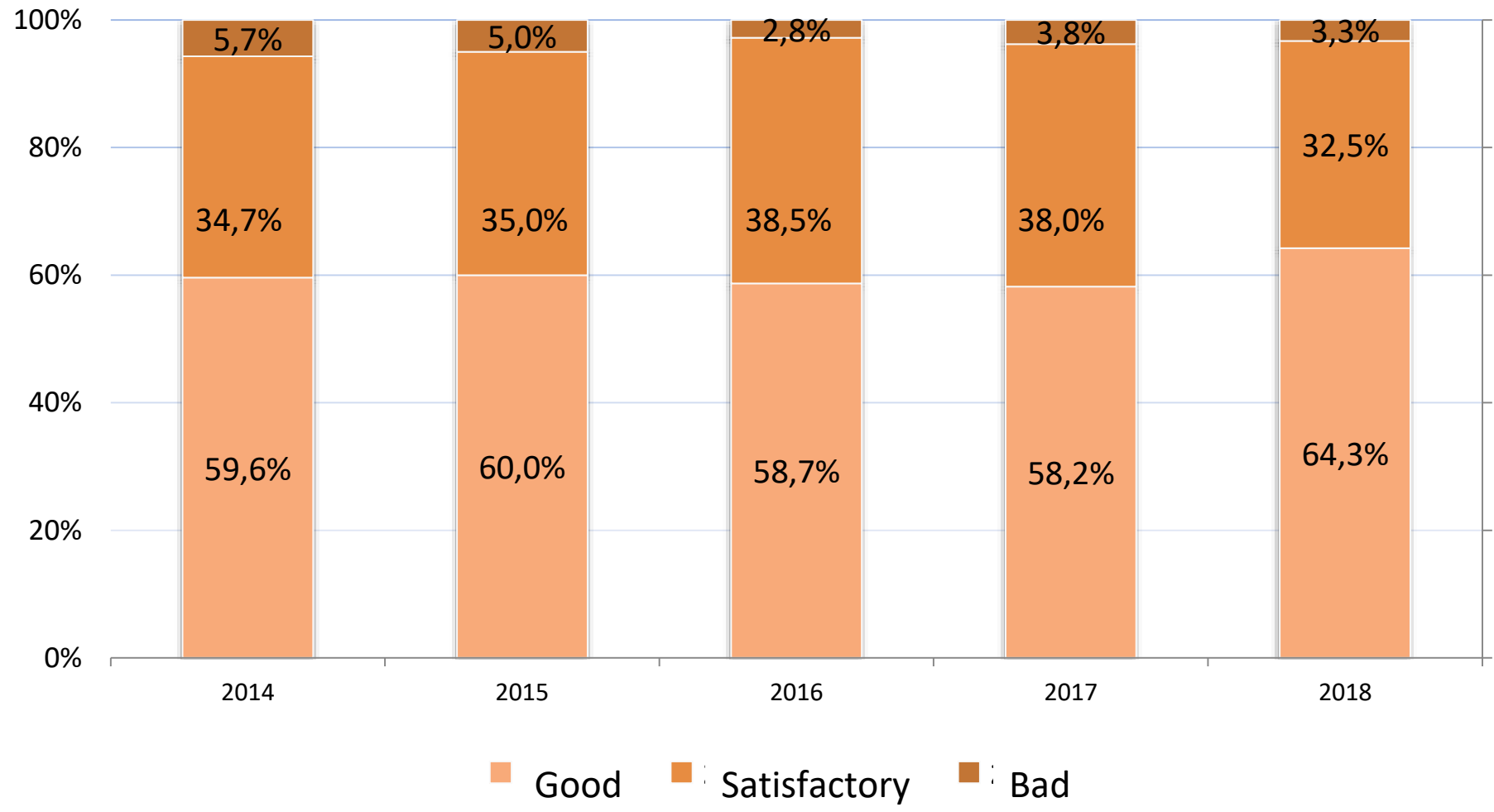
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2018



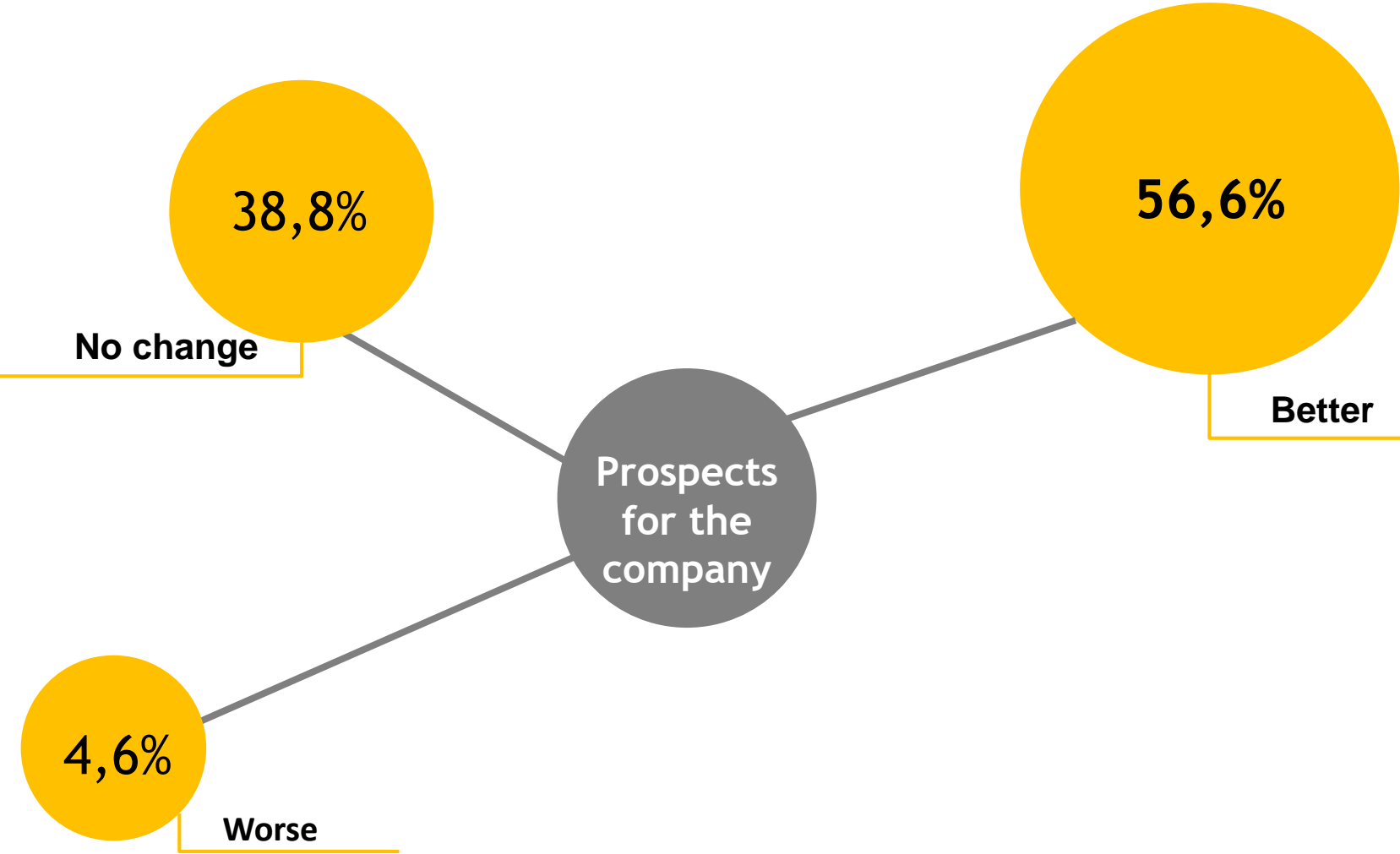
How do you evaluate the current economic situation of your company?

Comparison to the previous editions of the survey

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2018



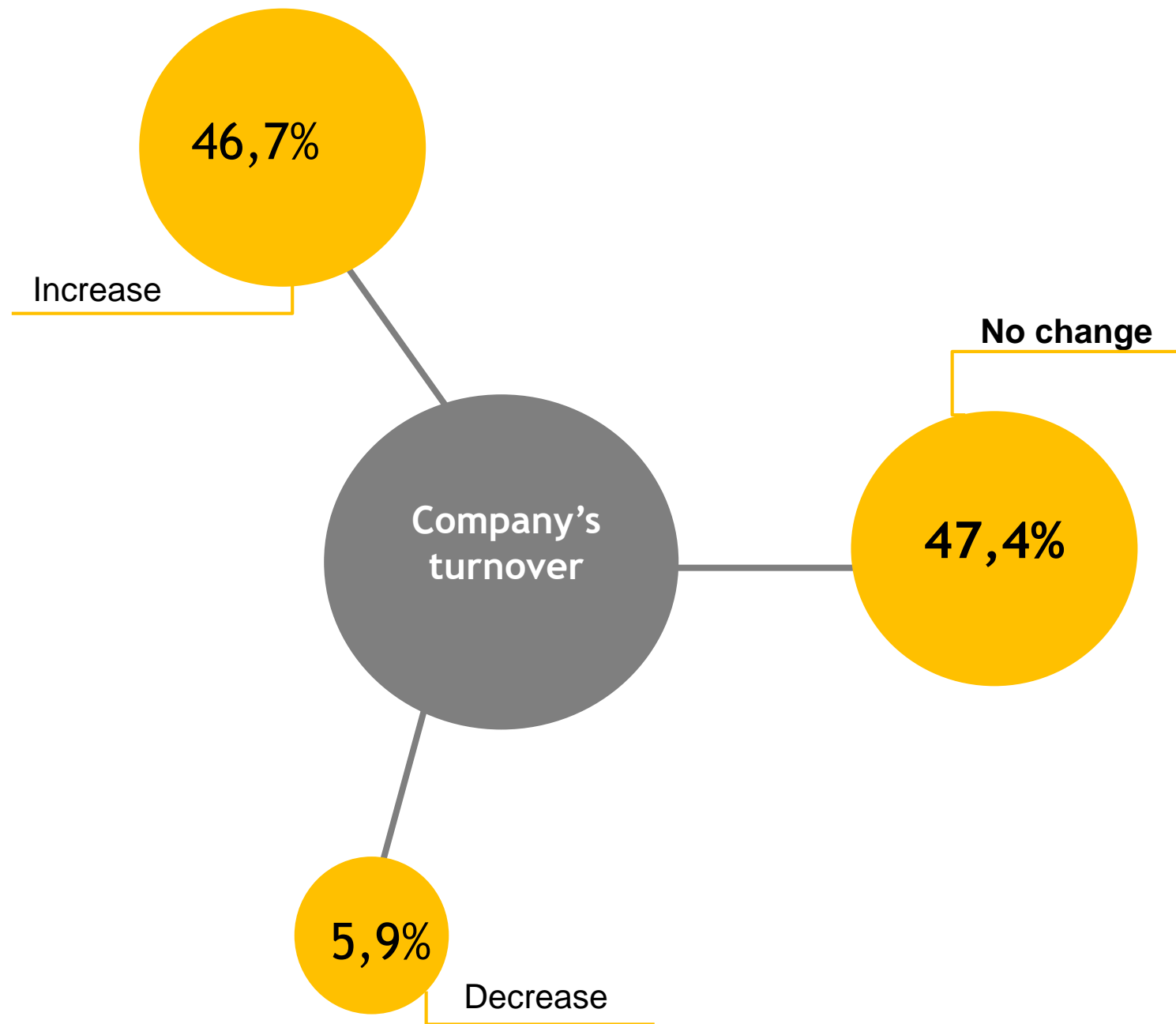
What are the prospects for your company in 2018 compared to 2017?



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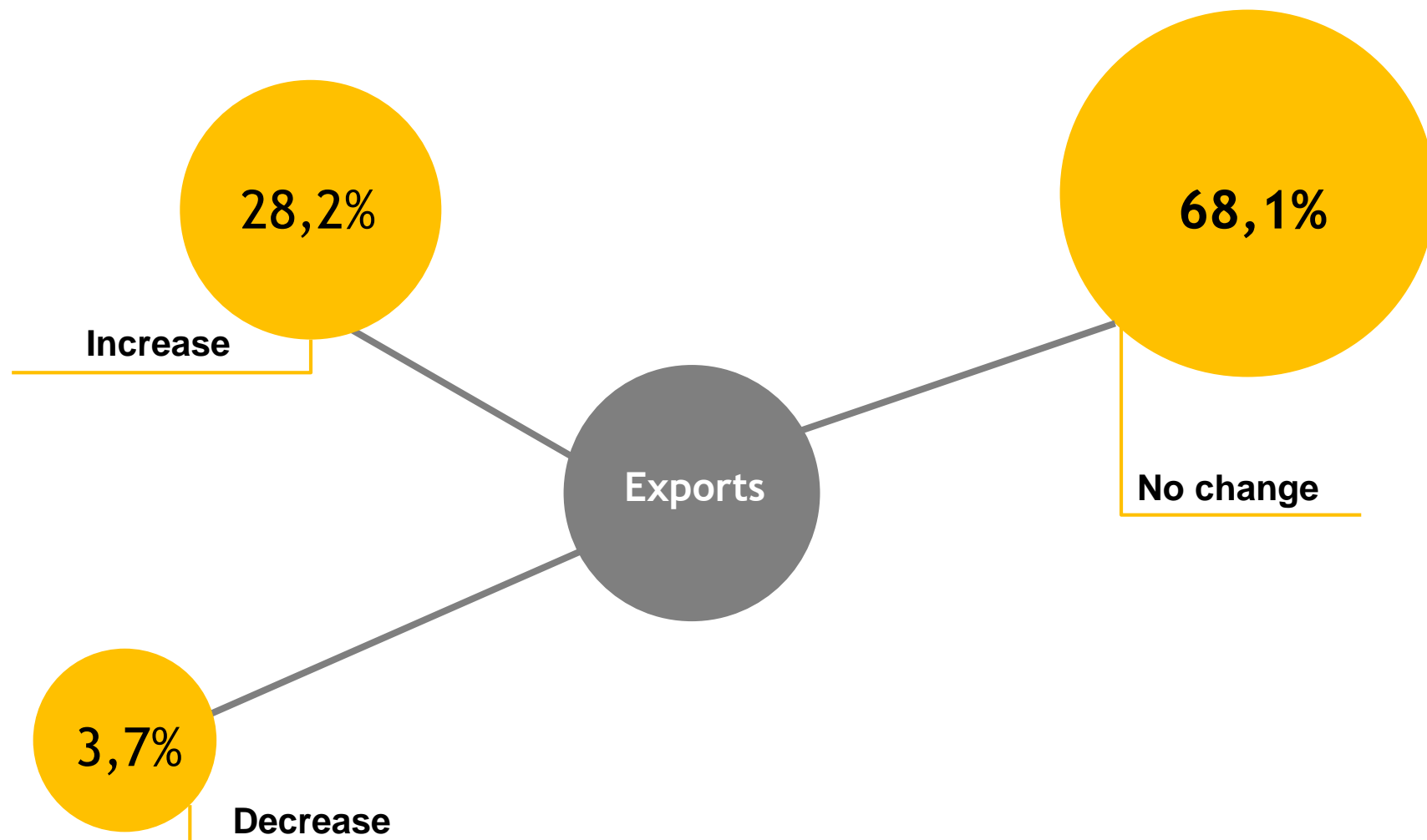
What are the prospects for your company's turnover in 2018 compared to 2017?

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

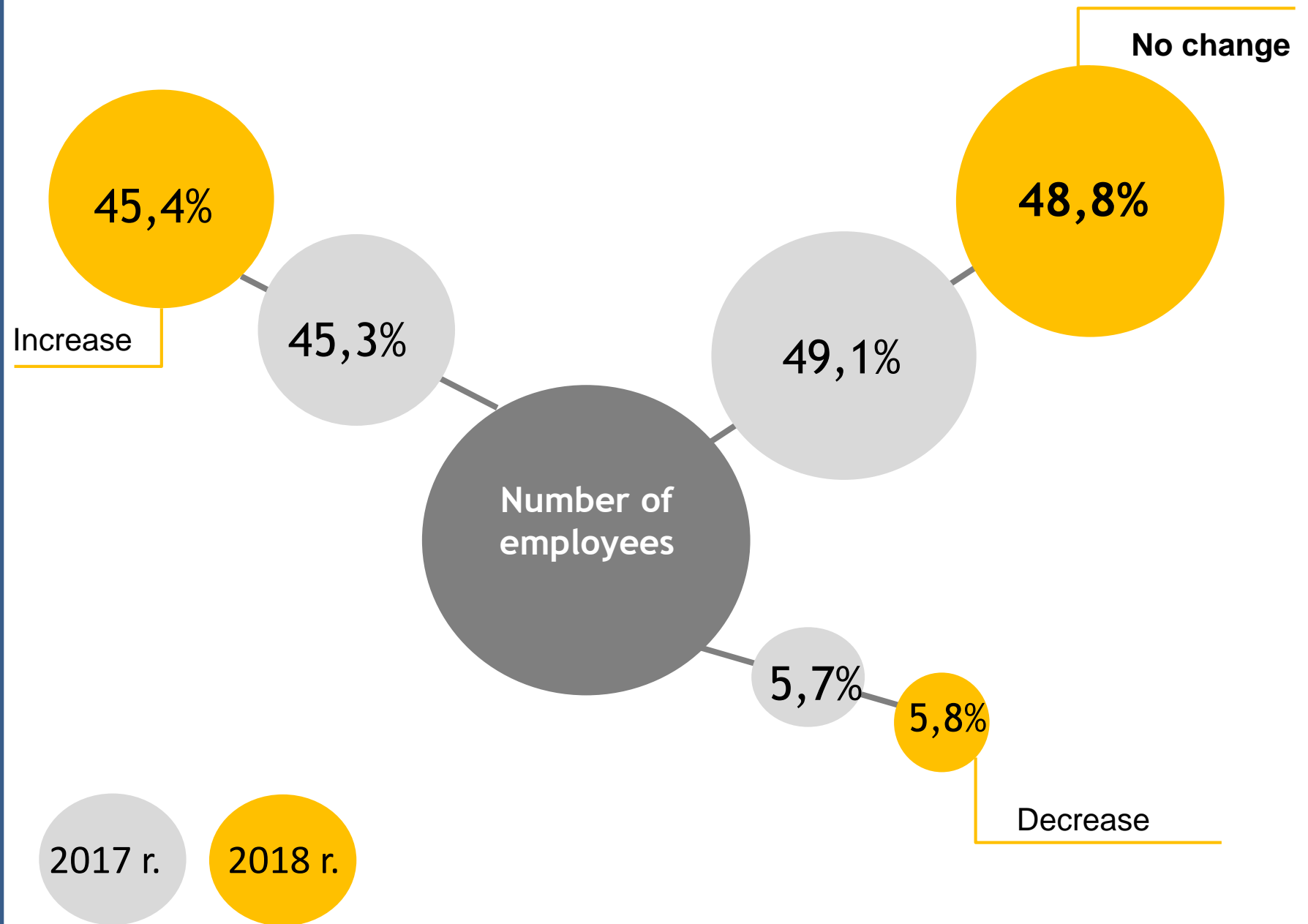
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What are the prospects for your company's number of employees in 2018 compared to 2017?

Comparison to the previous edition of the survey

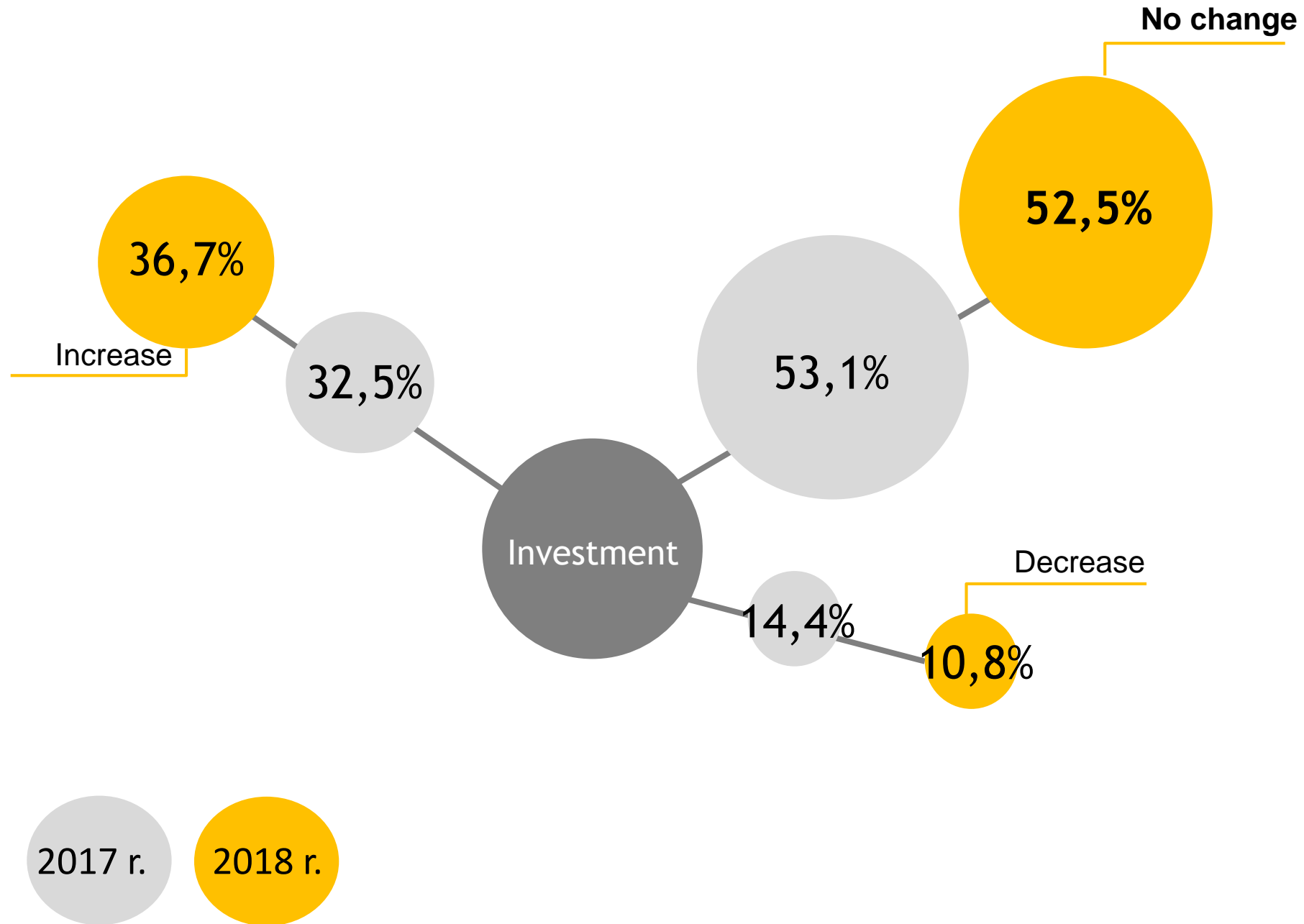
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What are the prospects for your company's expenditure on investment in 2018 compared to 2017?

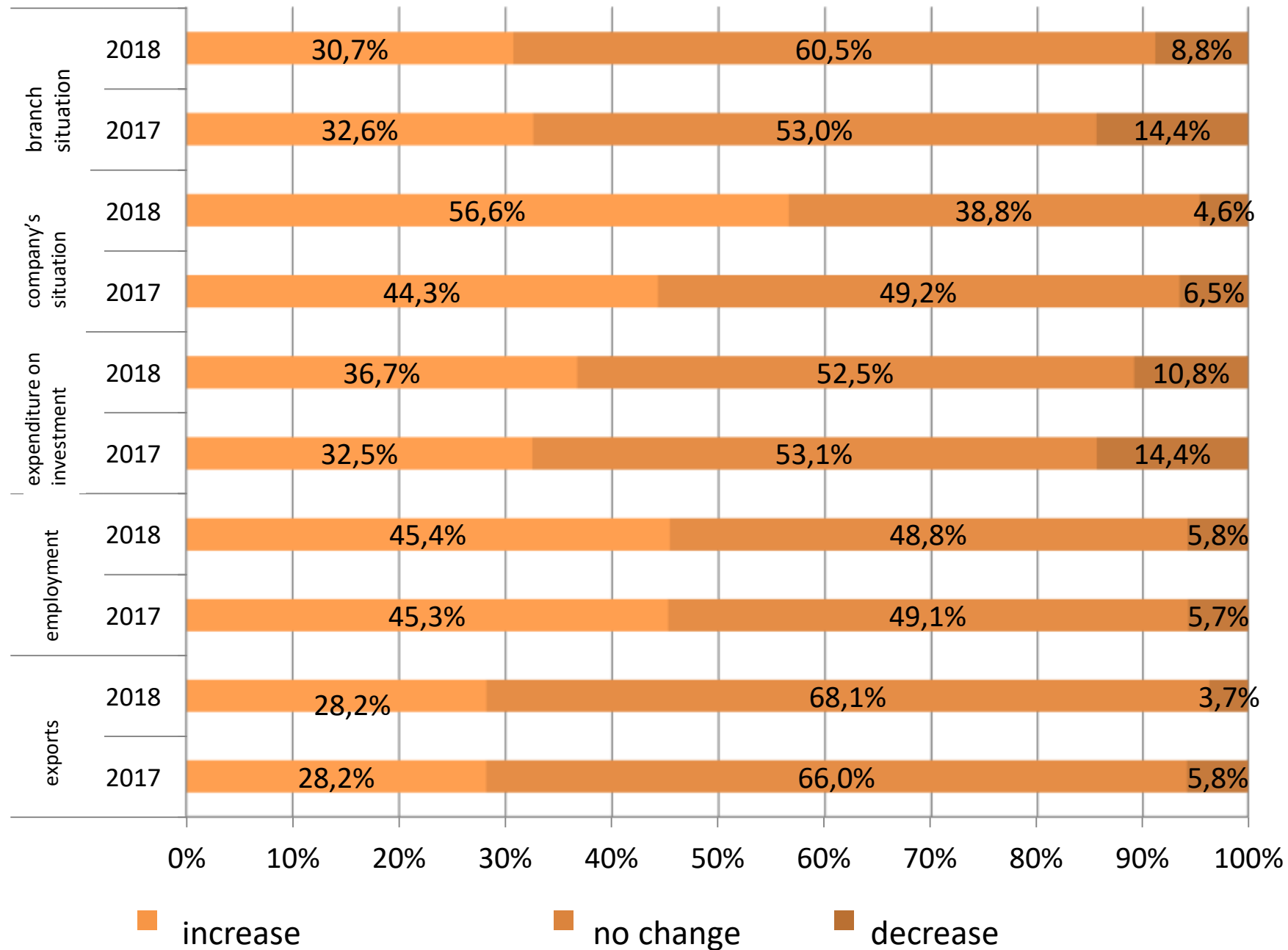
Comparison to the previous edition of the survey

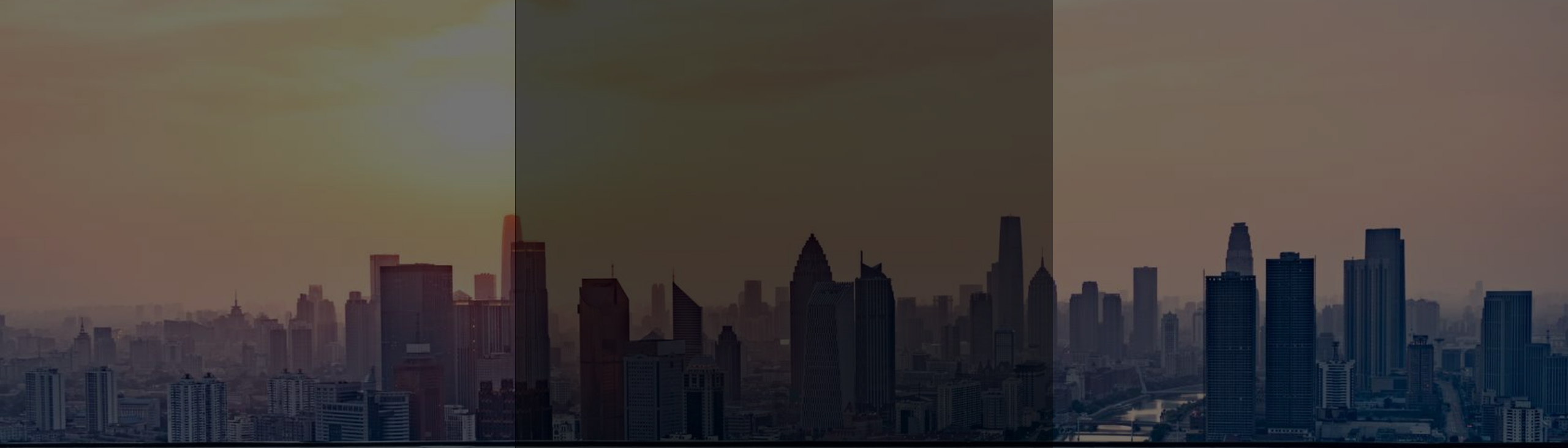
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Prospects for the companies in 2018 and 2017

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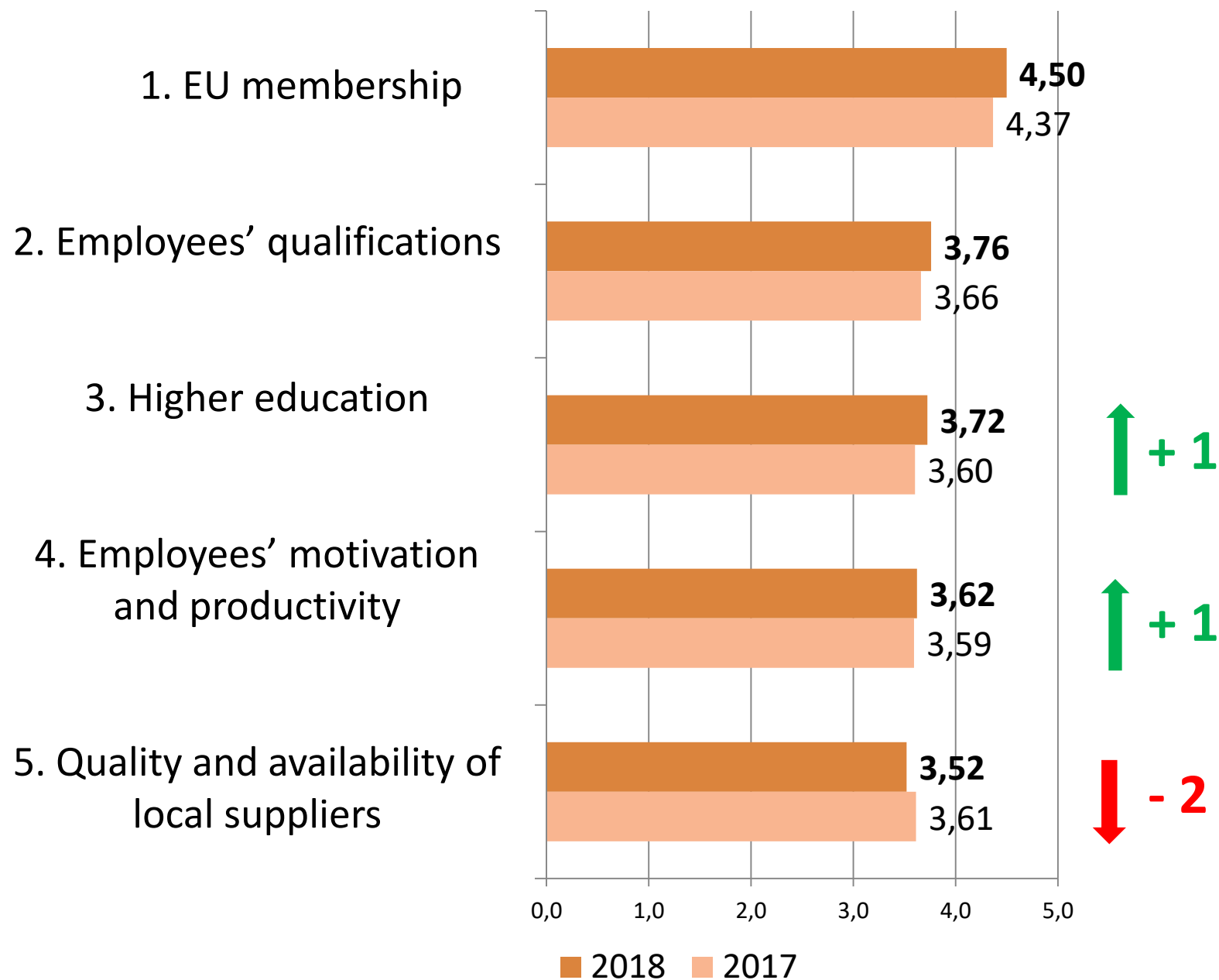


Part III

Investment factors

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

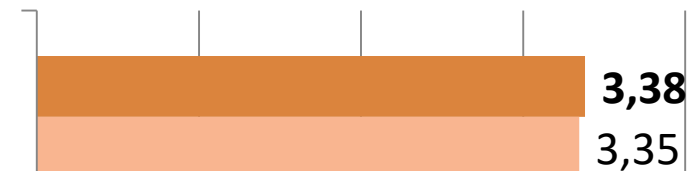
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Evaluation of investment factors (points and change of rank 2017/2018 1 - min; 5 - max)

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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

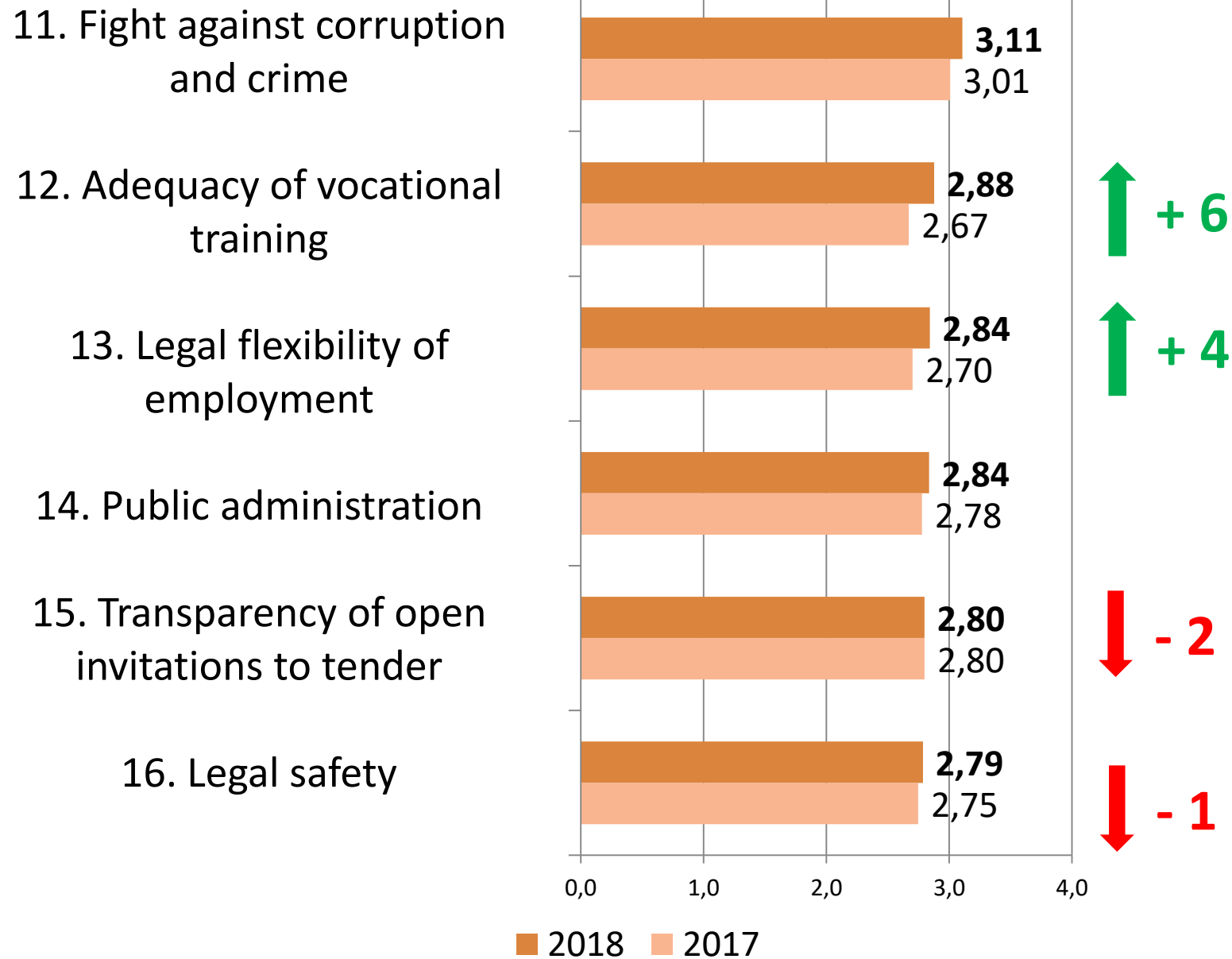


0,0 1,0 2,0 3,0 4,0

■ 2018 ■ 2017

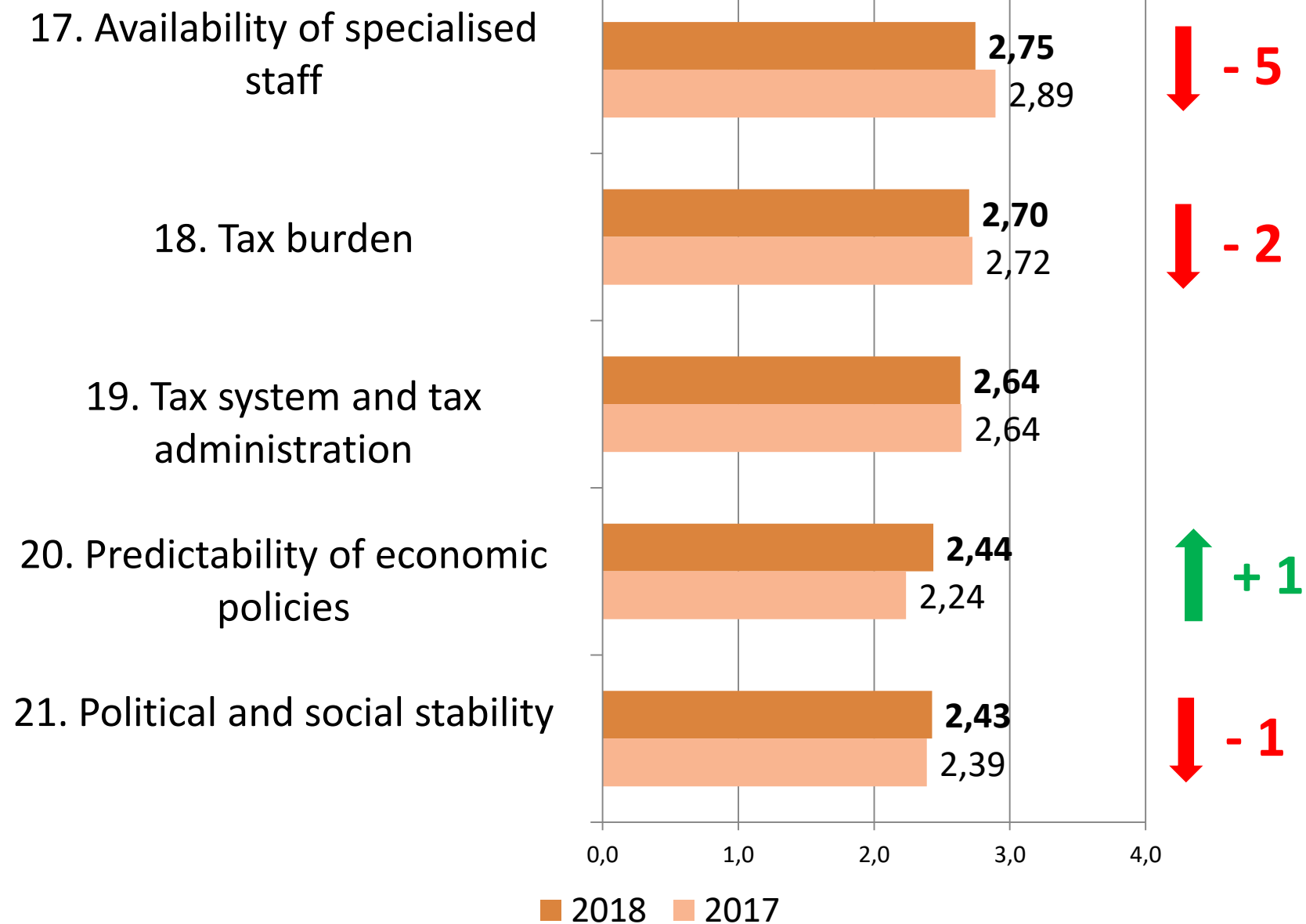
Evaluation of investment factors (points and change of rank 2017/2018 1 - min; 5 - max)

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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

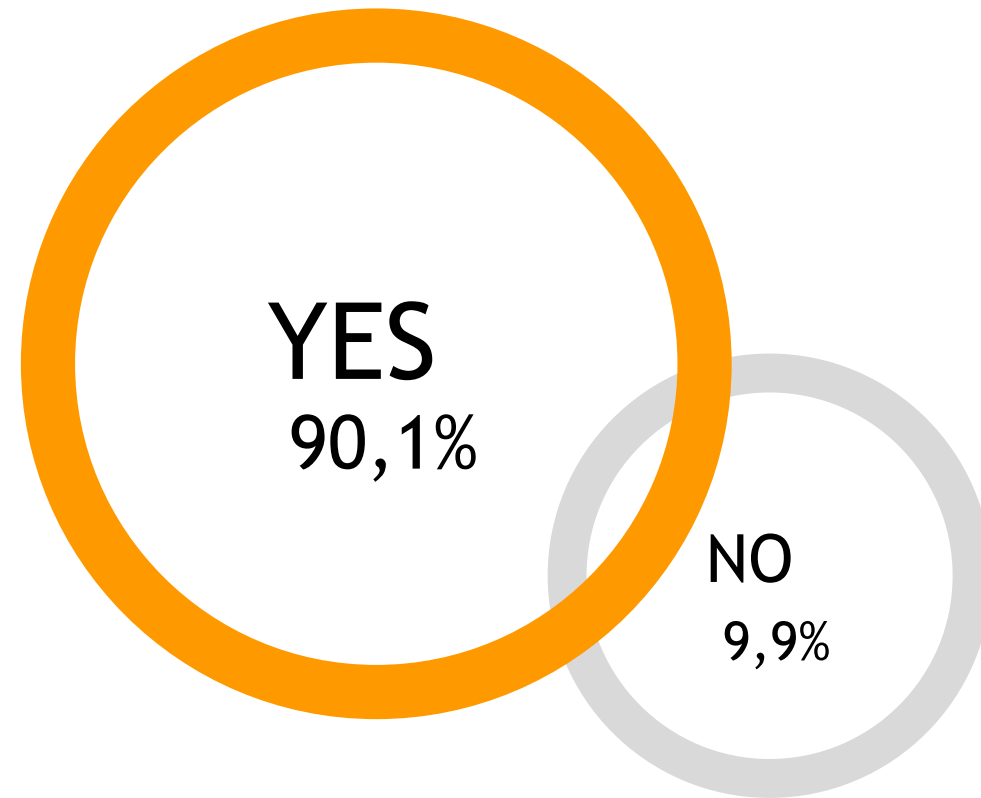


Part IV

Investment attractiveness

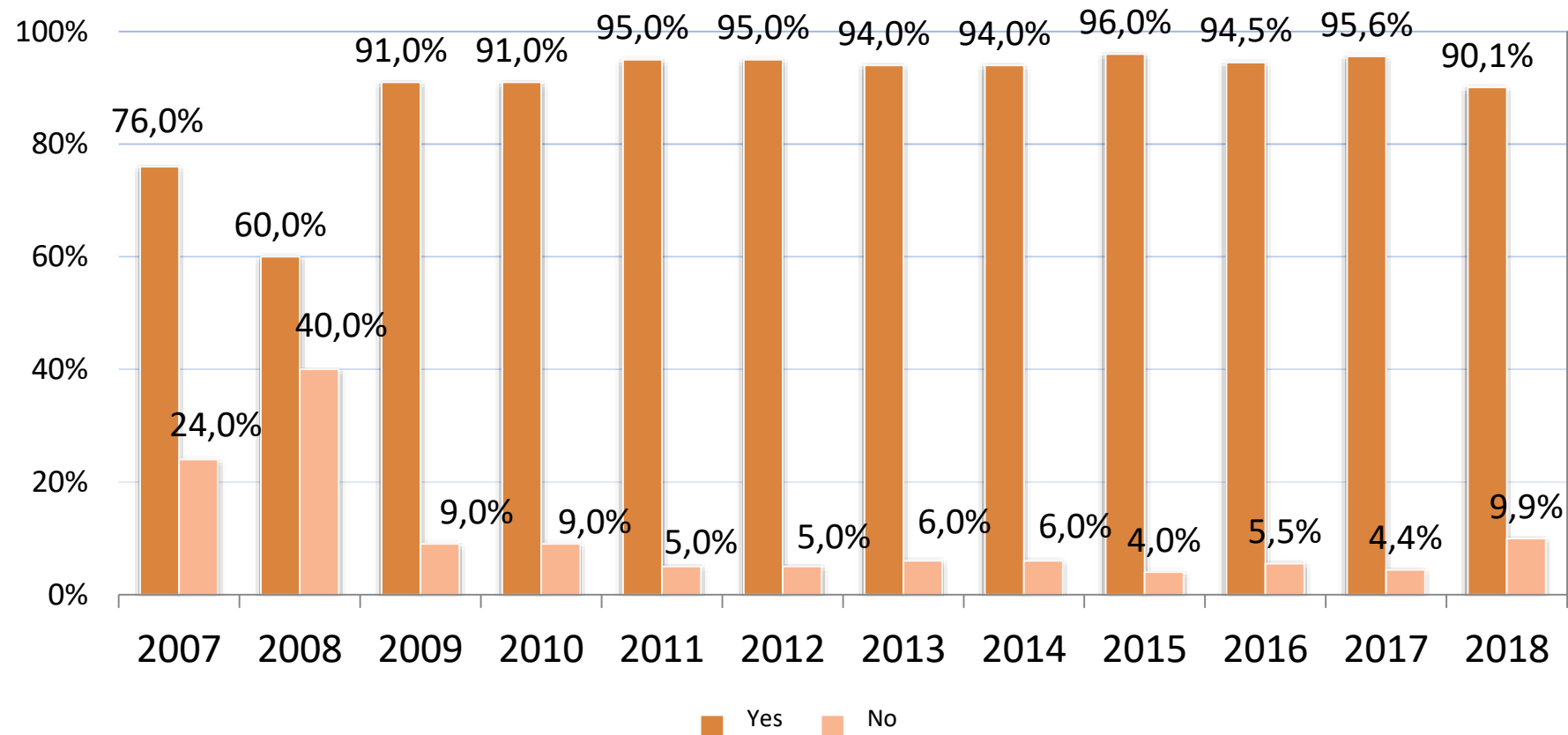
Would you invest
in Poland again?

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Would you invest in Poland again?

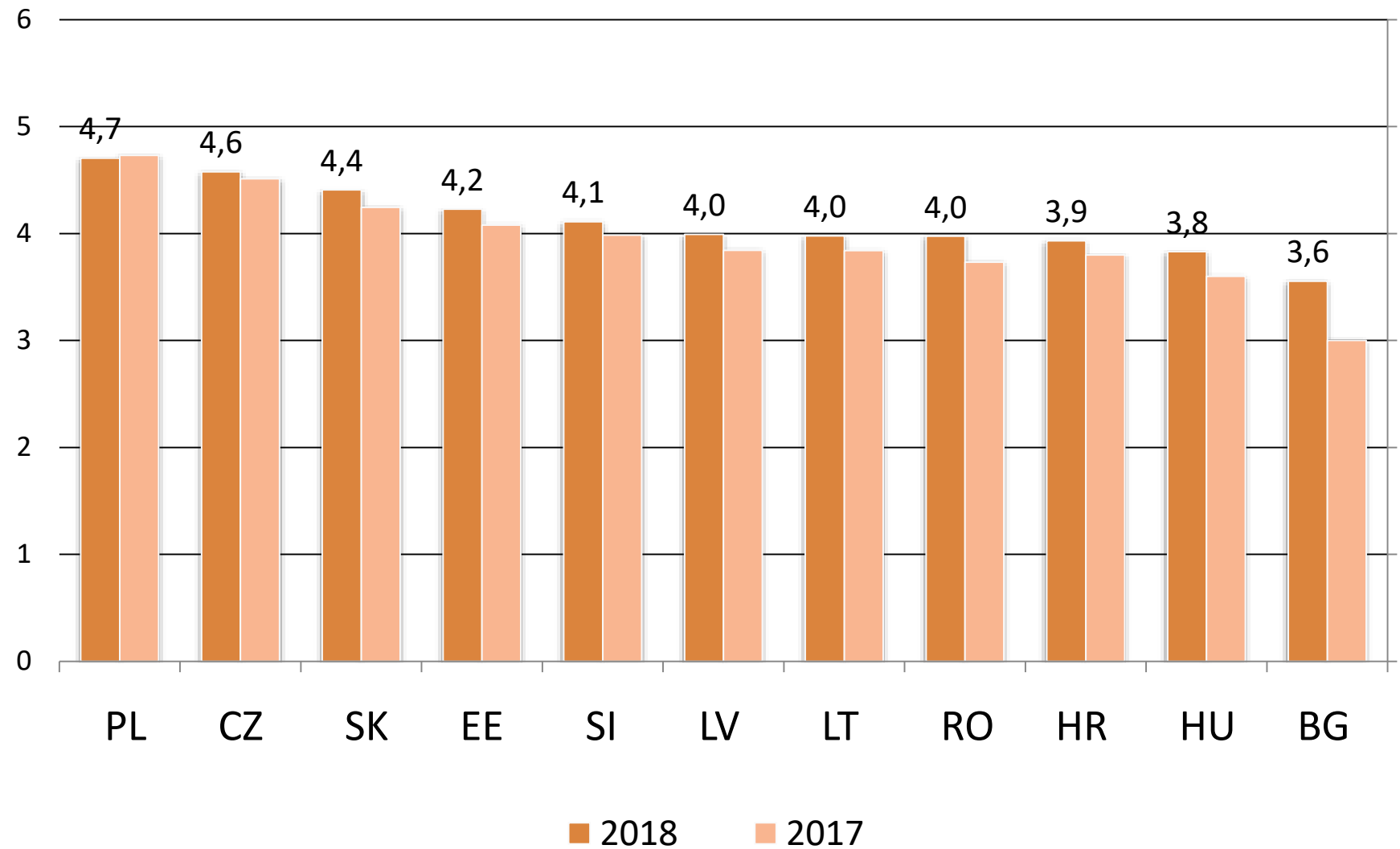
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Investment attractiveness of CEE countries in 2018 according to 300 investors from Poland

6 - very attractive
1 - not attractive at all

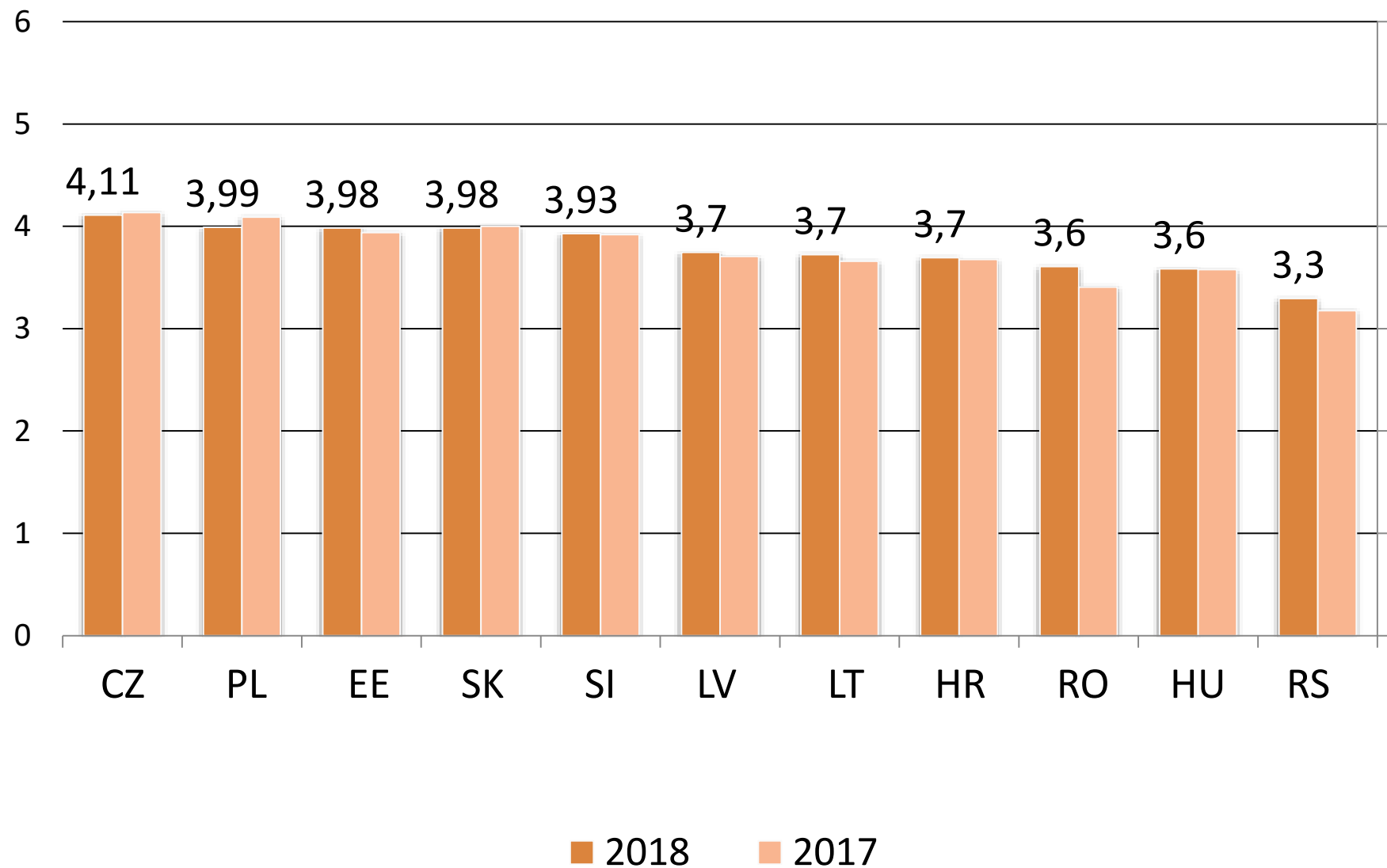
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Investment attractiveness of CEE countries in 2018 according to 1700 investors from the region

6 - very attractive
1 - not attractive at all

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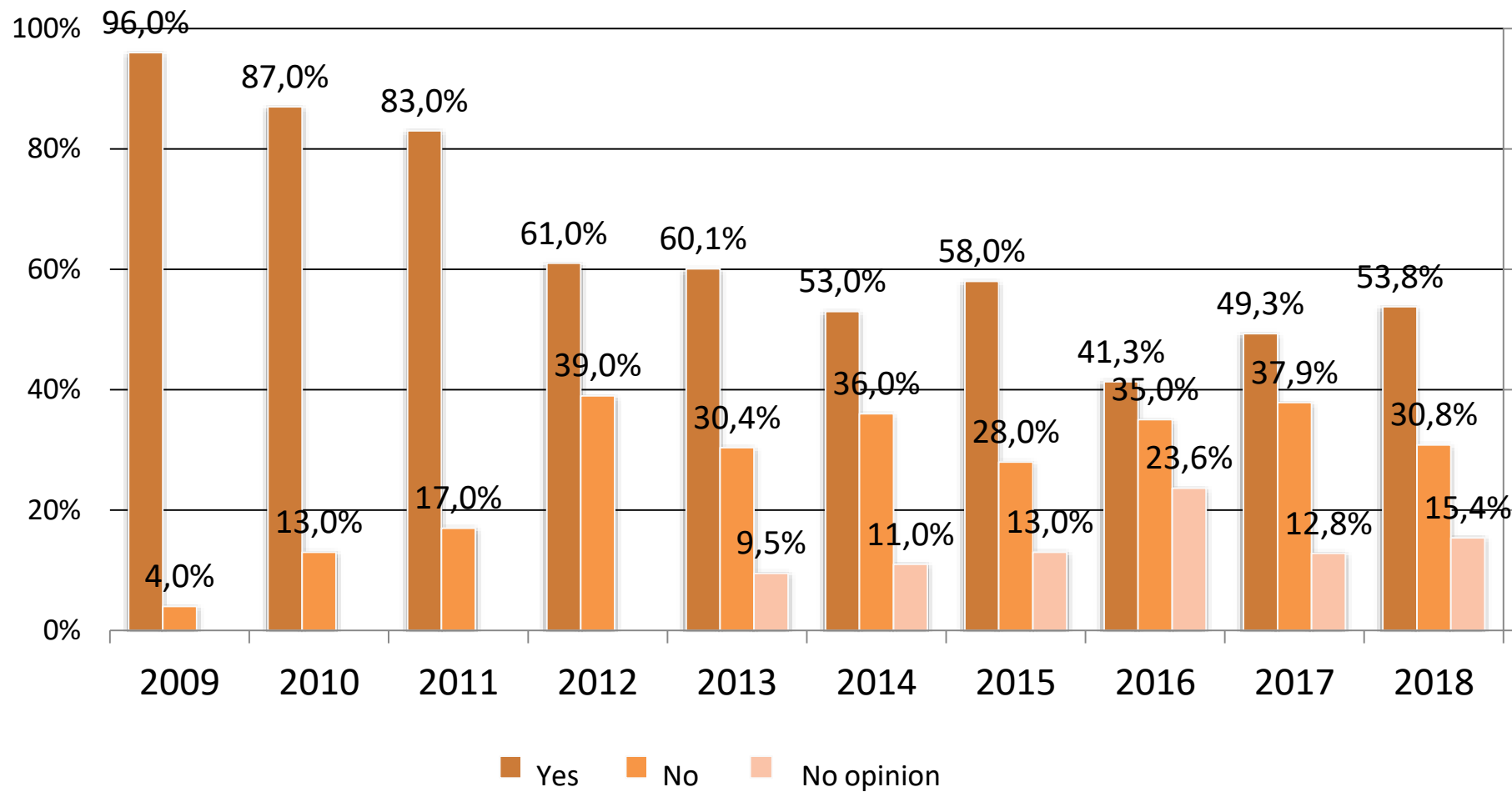
Investment attractiveness of CEE countries according to investors from the whole region

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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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