

Business survey 2017

Poland in the eyes of foreign investors

International Group of Chambers of Commerce in Poland



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KONTAKTY _ NETZWERK



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Characteristics of the surveyed companies

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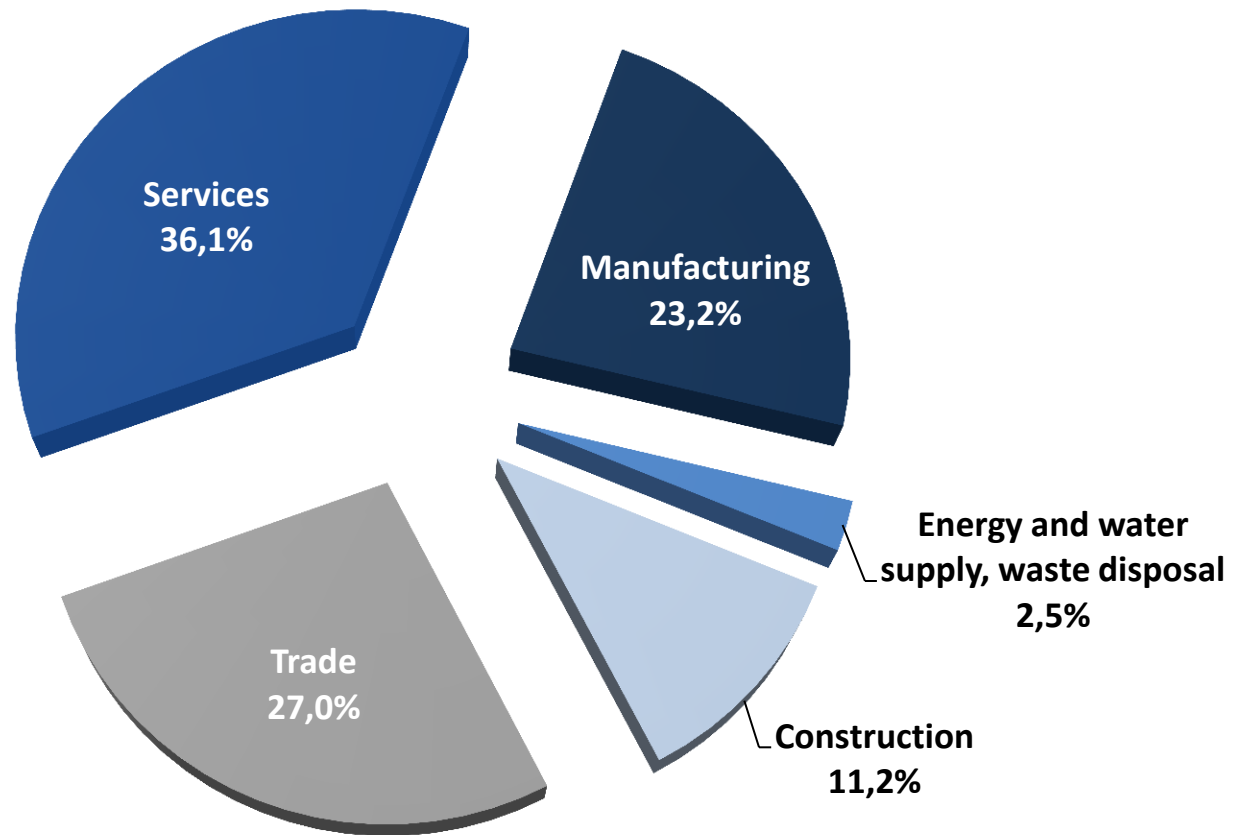
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Structure of respondents - branches



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Results of the survey

I. Poland's economic situation

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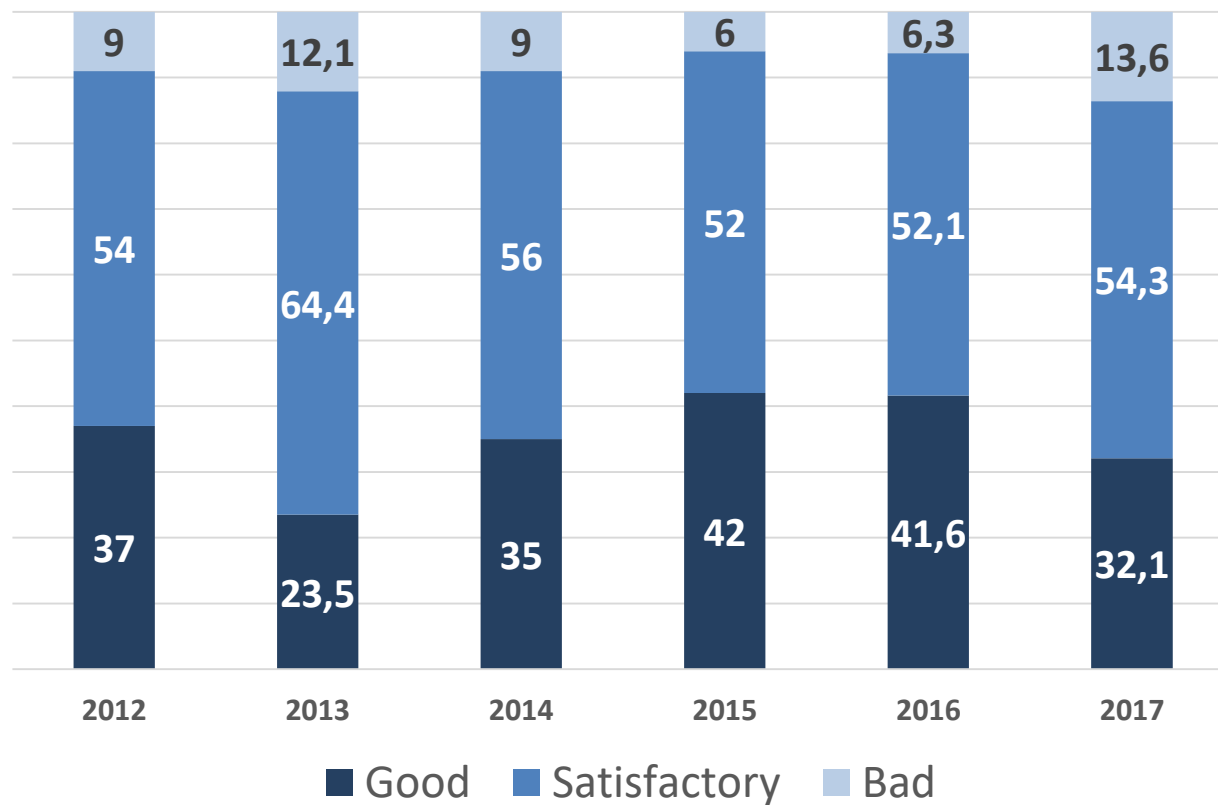
KONTAKTY _ NETZWERK



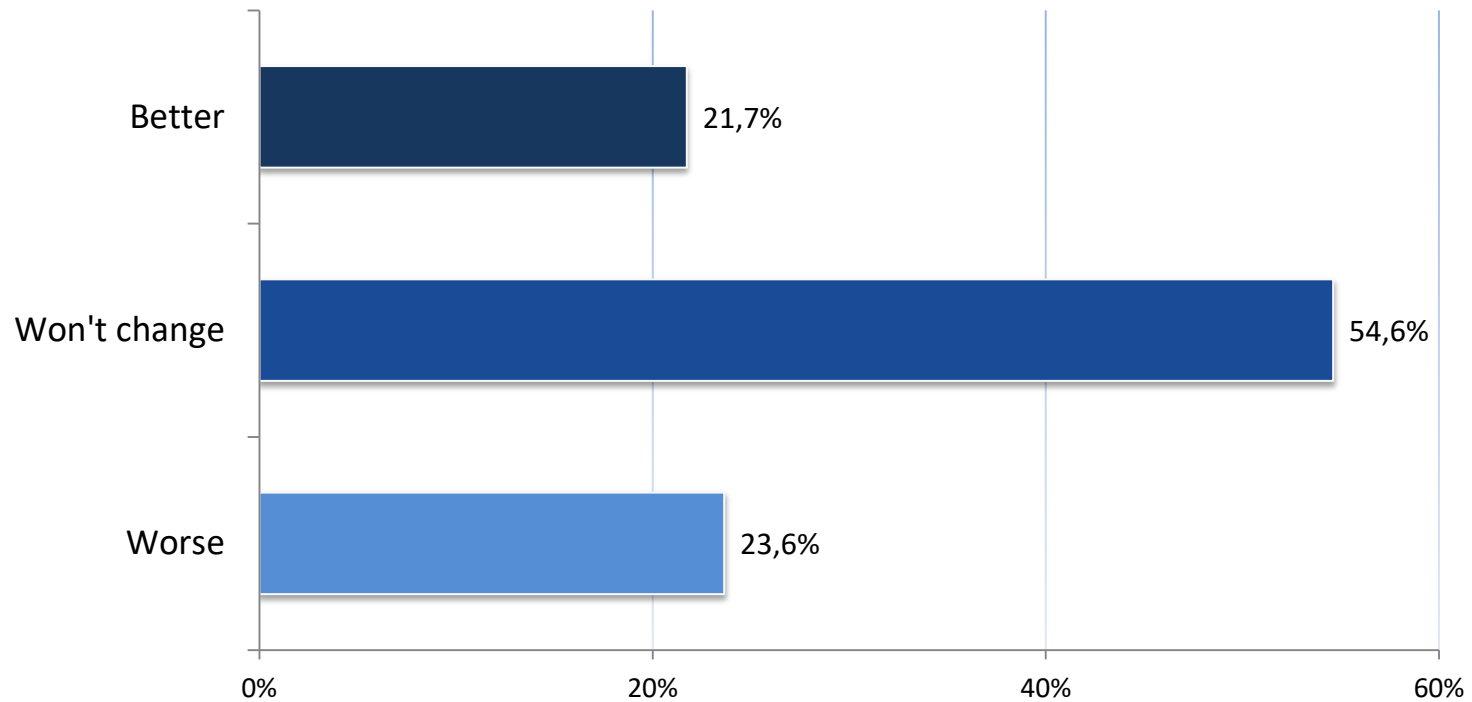
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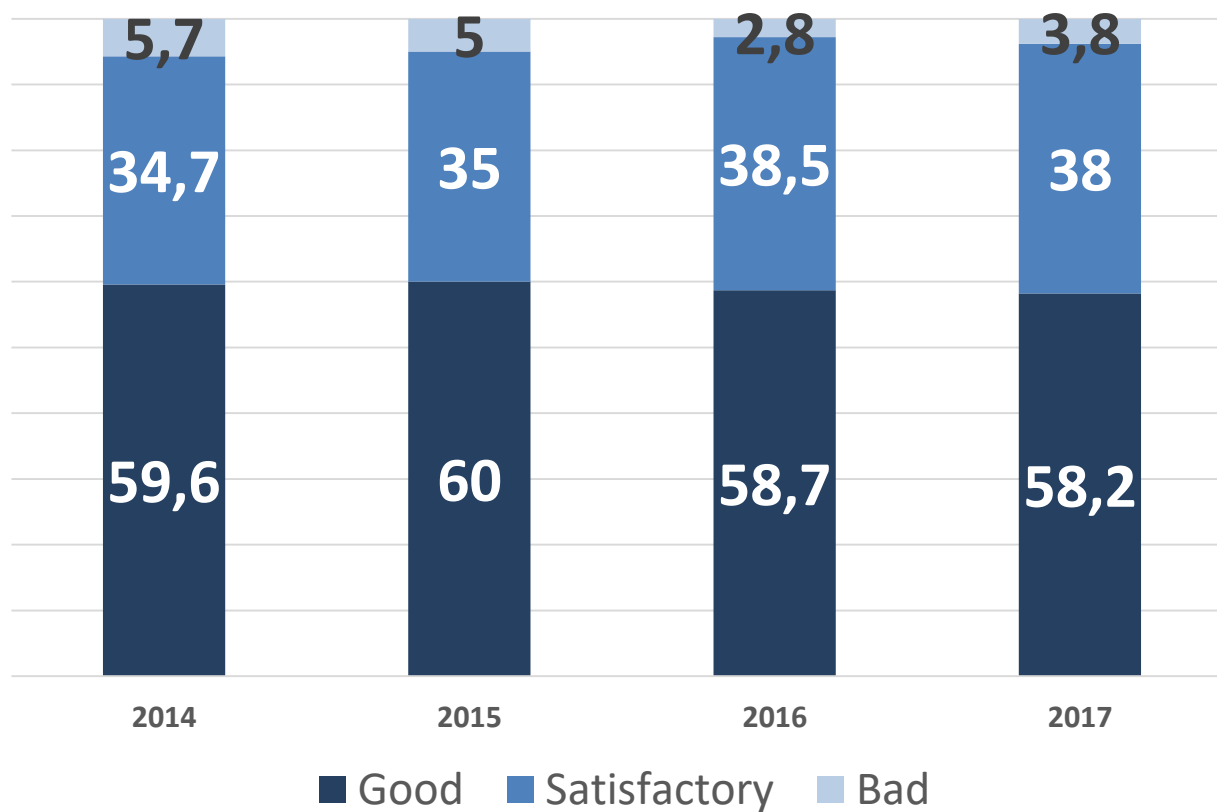
Evaluation of the current economic situation in Poland



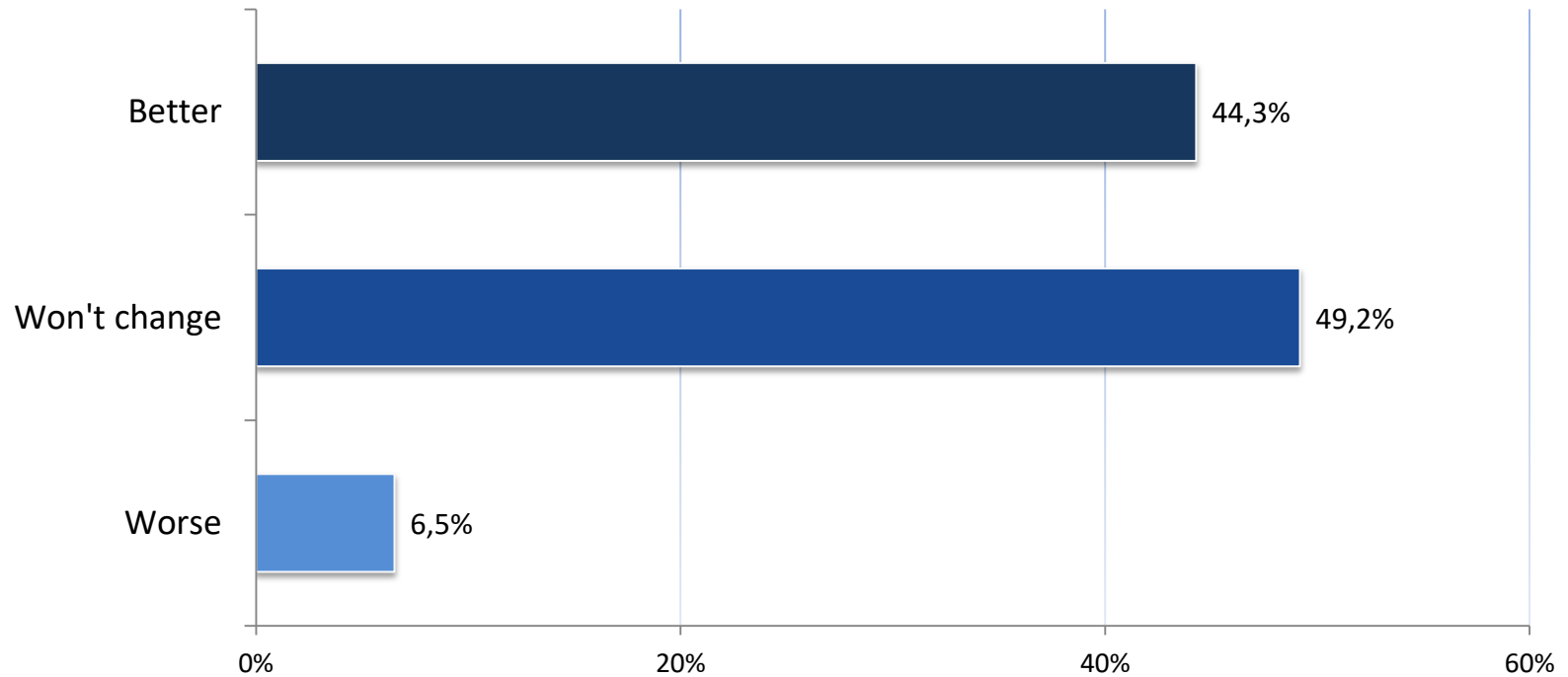
Prospects for the Polish economy for 2017 in comparison with 2016



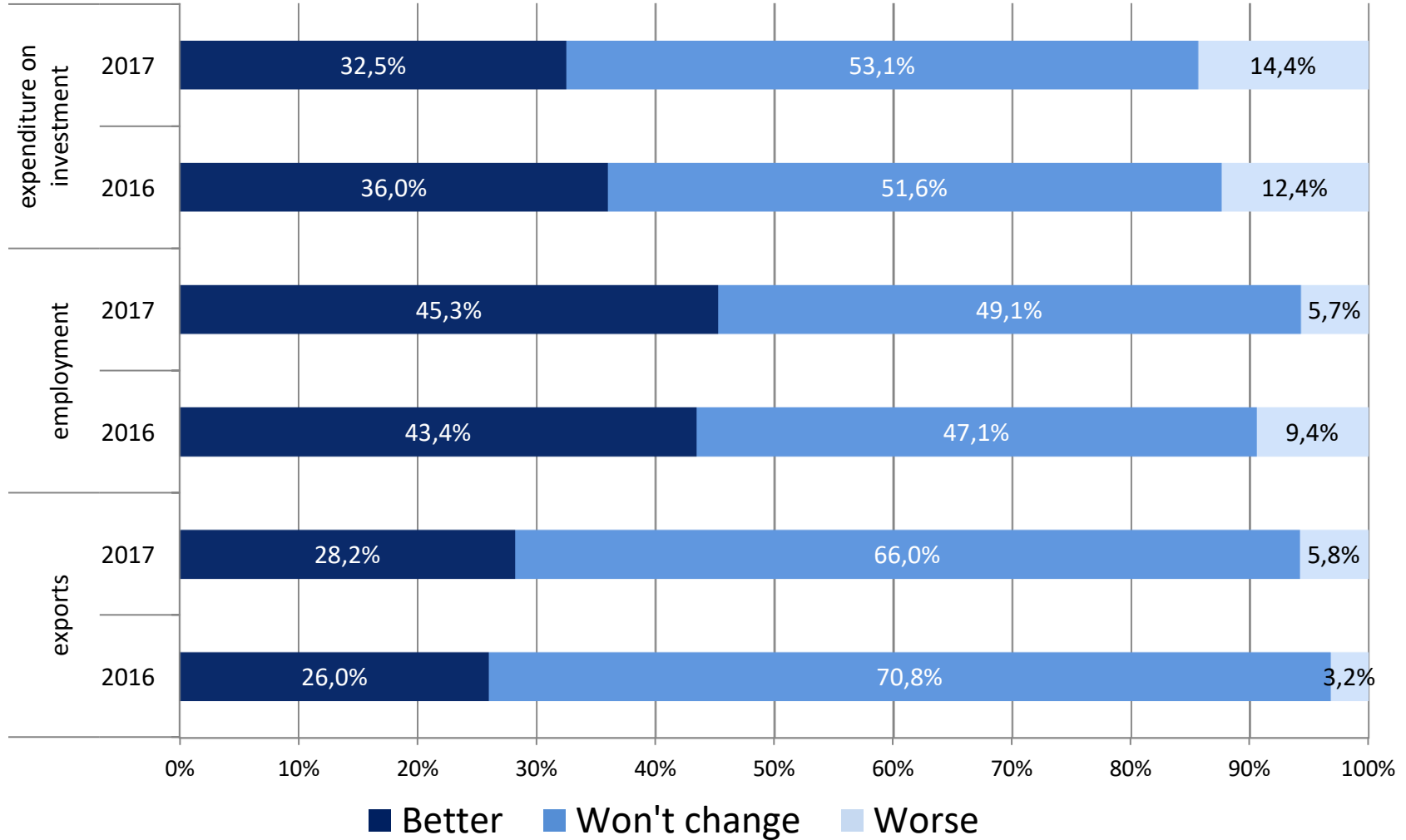
Current economic situation of the company



What are the prospects for your company in 2017 compared to 2016?



Company's investment, employment and exports 2017 and 2016



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Results of the survey

II. Investment factors

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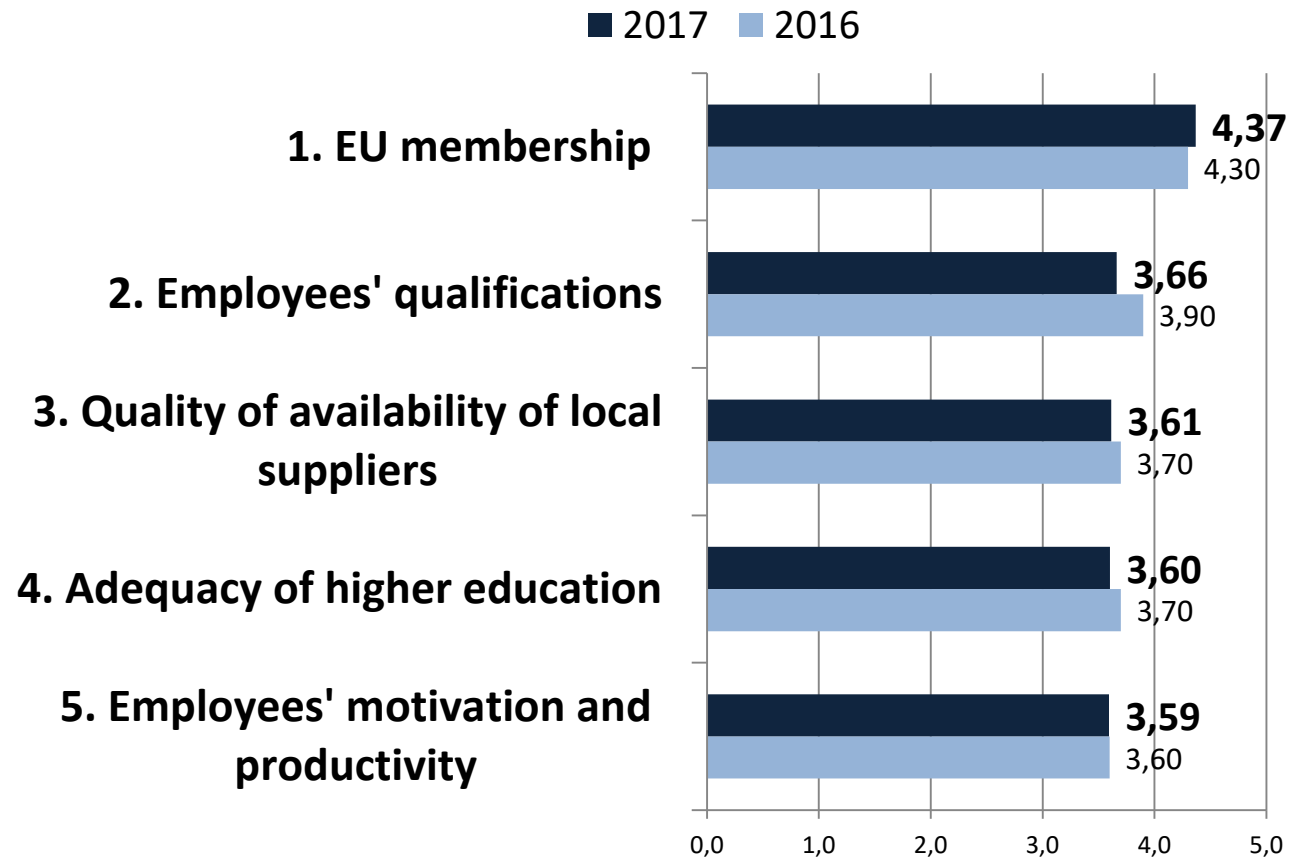
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Evaluation of investment factors

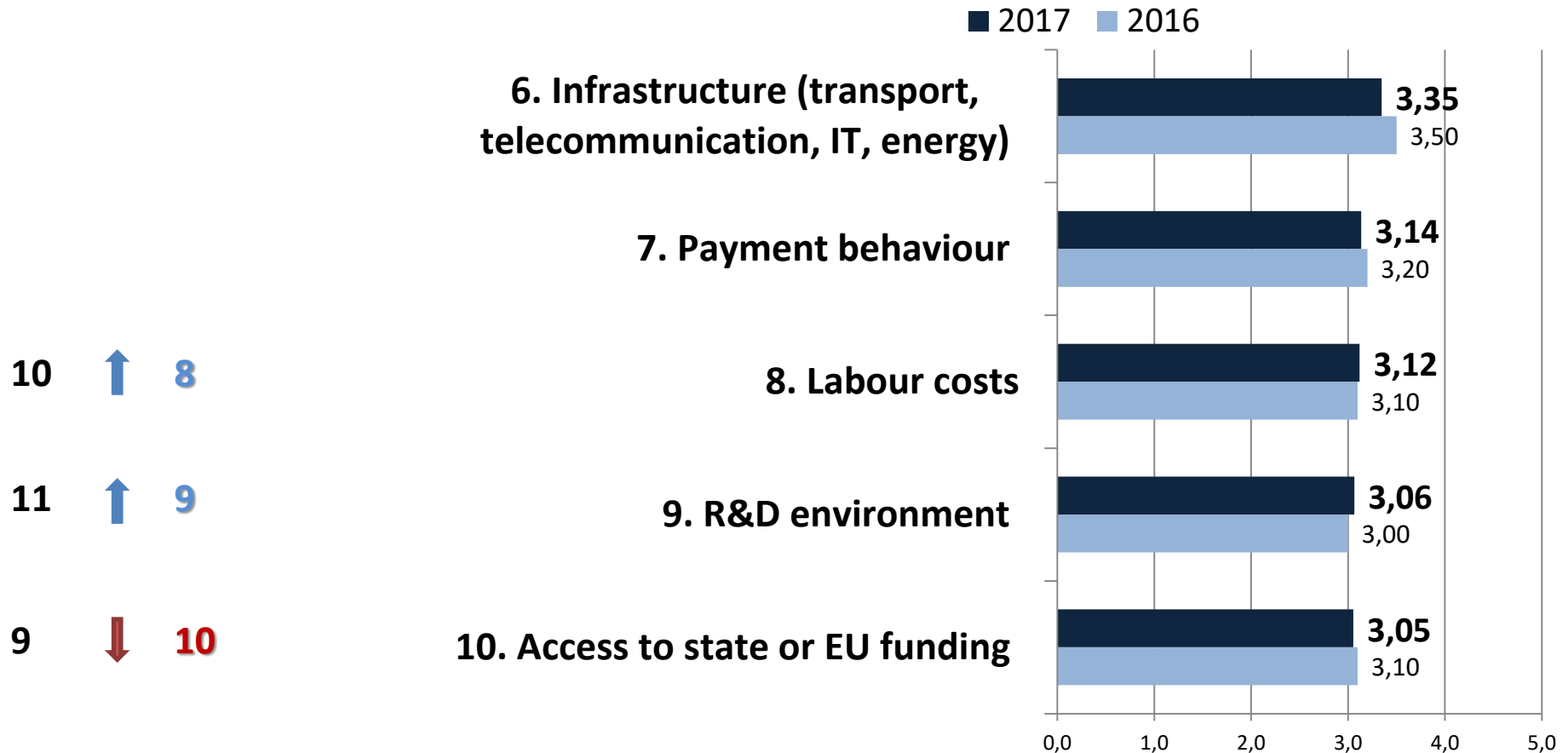
5 – max. 1 – min

4 ↑ 3
3 ↓ 4



Evaluation of investment factors

5 – max. 1 – min



PRESTIŻ _ PRESTIGE

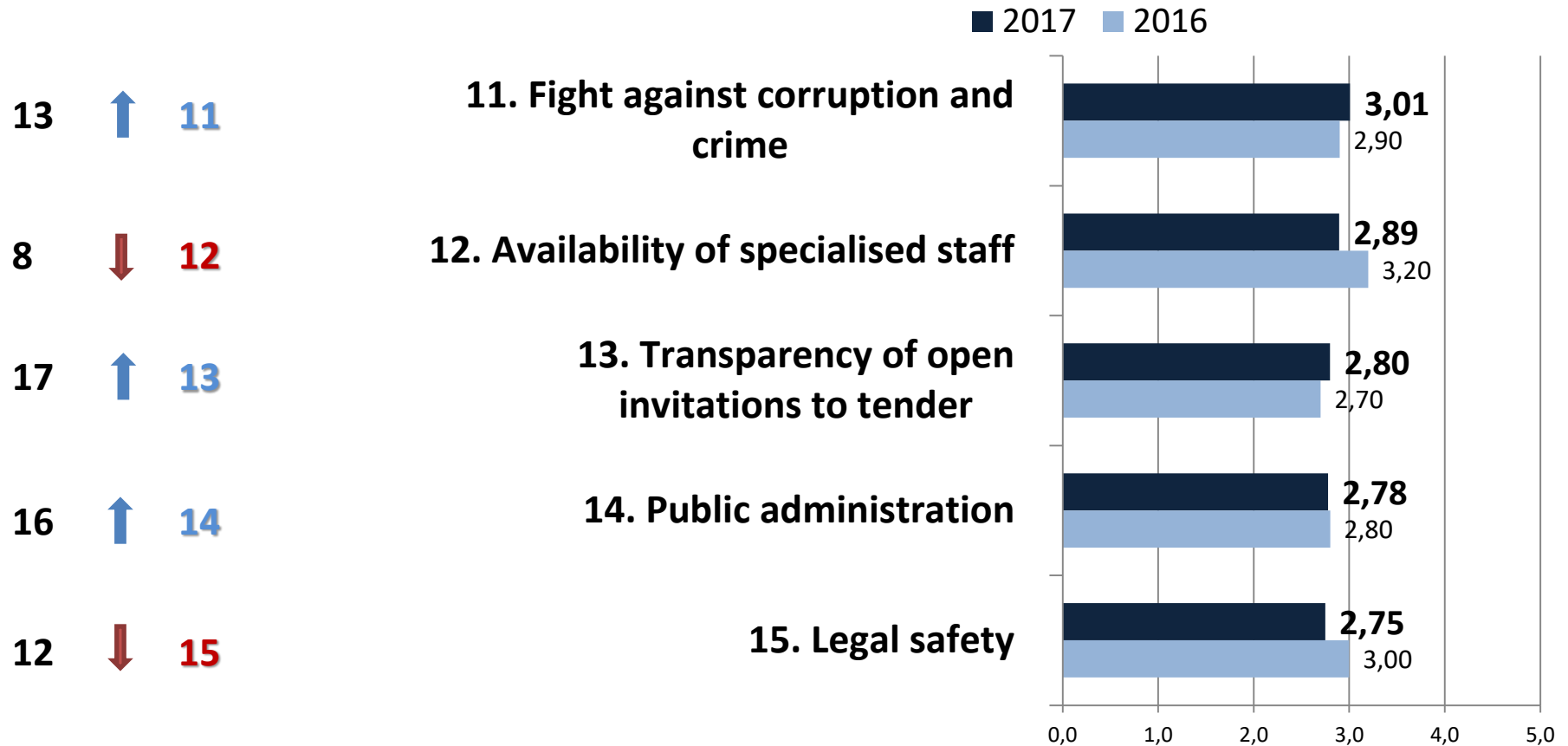
USŁUGI _ SERVICE

KONTAKTY _ NETZWERK



Evaluation of investment factors

5 – max. 1 – min



PRESTIŻ _ PRESTIGE

USŁUGI _ SERVICE

KONTAKTY _ NETZWERK

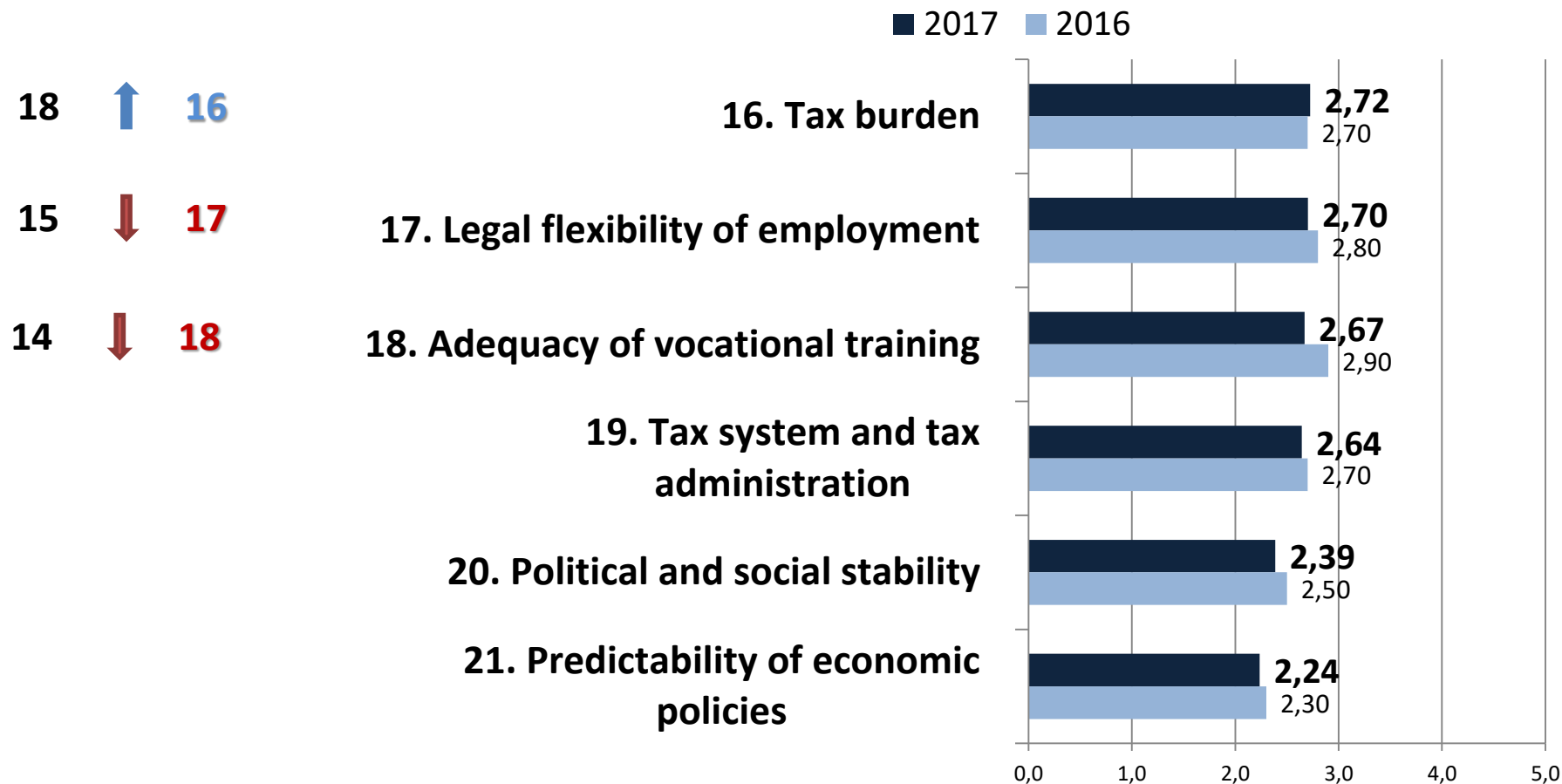


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Evaluation of investment factors

5 – max. 1 – min



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Most important changes – 2016/2017

Transparency of open invitations to tender

17 ↑ 13

Labour costs

10 ↑ 8

R&D environment

11 ↑ 9

Fight against corruption and crime

13 ↑ 11

Public administration

16 ↑ 14

Availability of specialised staff

8 ↓ 12

Adequacy and vocational training

14 ↓ 18

Legal safety

12 ↓ 15

Legal flexibility of employment

15 ↓ 17

Results of the survey

III. Investment attractiveness factors

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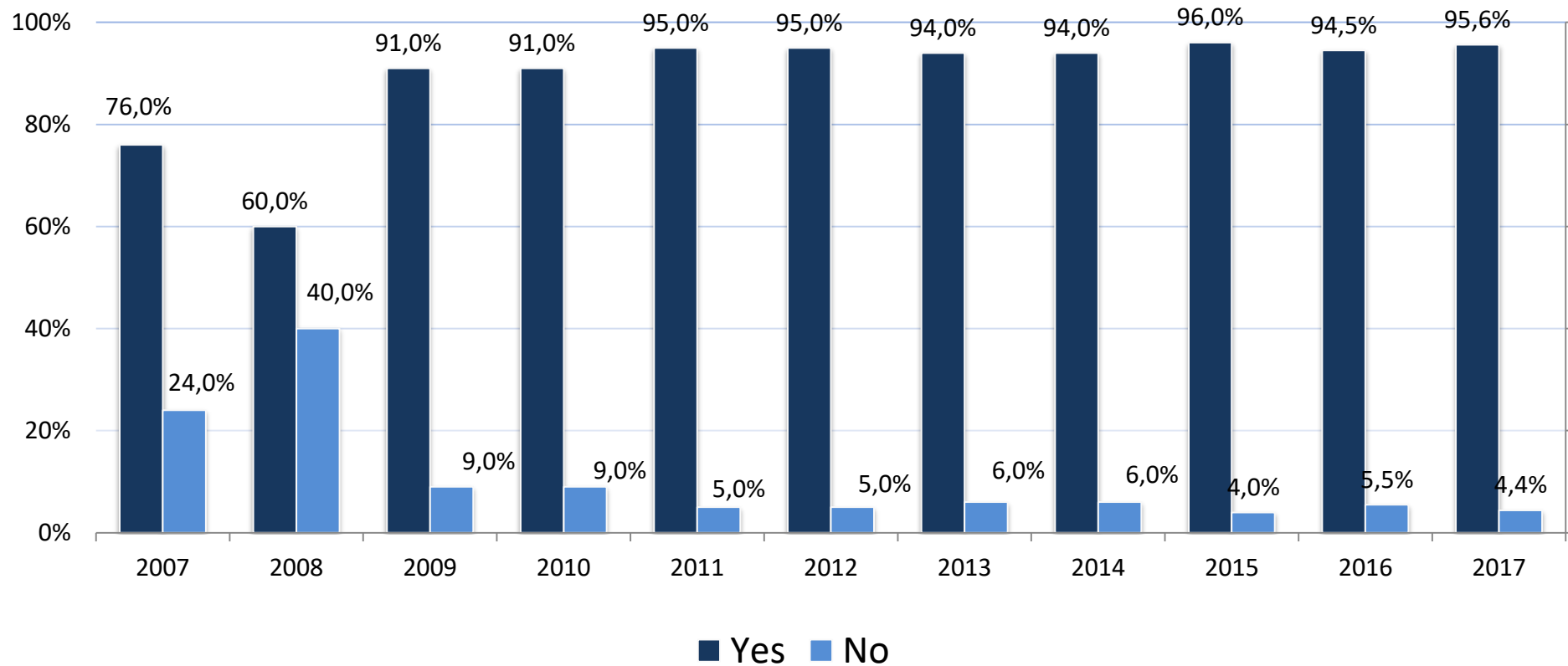
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Would you invest in Poland again?



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Investment attractiveness survey/ number of respondents in CEE countries

CEE	1734
Poland	369
Hungary	230
Czech Republic	138
Slovakia	176
Bulgaria	102
Romania	120
Serbia	66
Bosnia and Herzegovina	73
Macedonia	71
Croatia	126
Albania	45
Lithuania	51
Latvia	56
Estonia	62
Slovenia	49

A map of Europe with the Central and Eastern European (CEE) region highlighted in orange. The highlighted area includes Poland, Hungary, Czech Republic, Slovakia, Bulgaria, Romania, Serbia, Bosnia and Herzegovina, Macedonia, Croatia, Albania, Lithuania, Latvia, Estonia, and Slovenia. The rest of Europe and the surrounding seas are shown in light blue and yellow.

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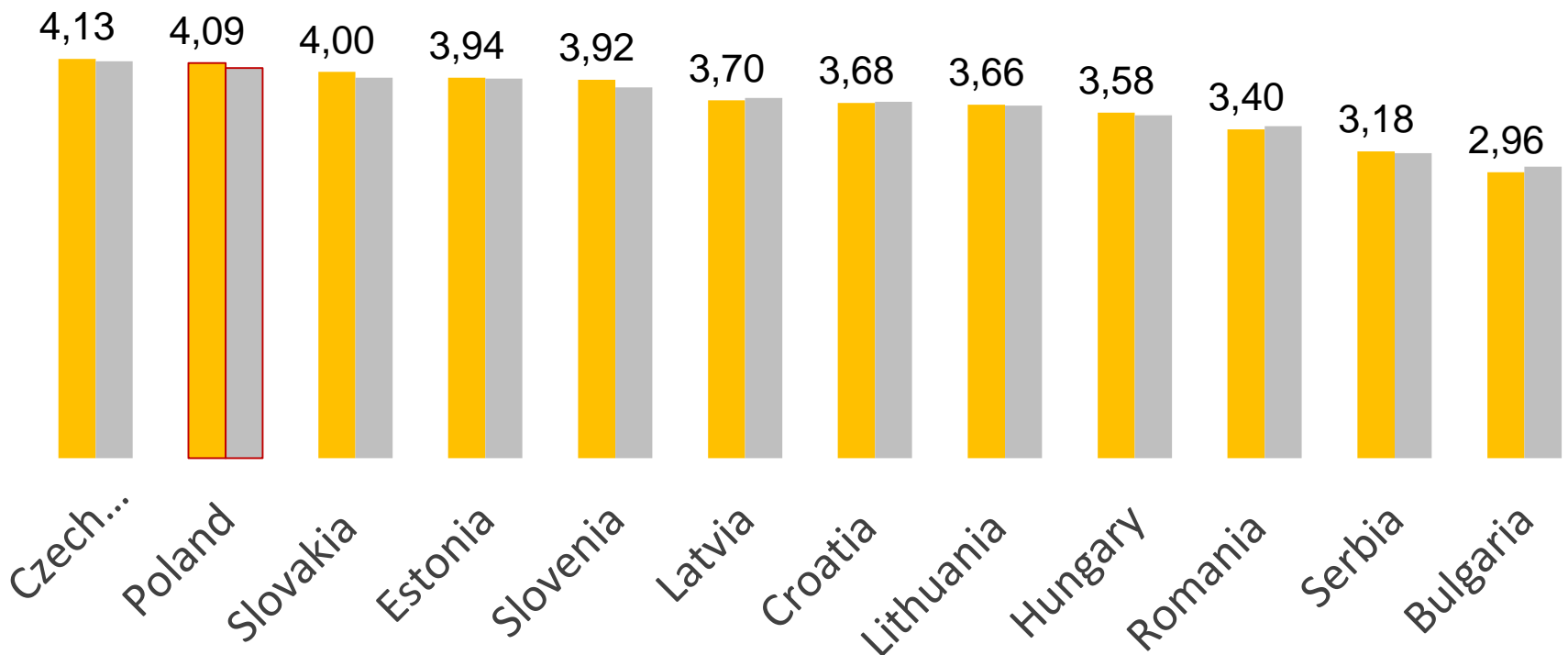
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Investment attractiveness of the CEE countries 2017 according to investors from the region

■ 2016
■ 2017

6 – very attractive 1- not attractive



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Investment attractiveness of the CEE countries - results from 2008

State	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
Czech Rep.	1	1	2	2	2	1	1	1	1	1
Poland	2	2	1	1	1	2	2	2	4	4
Slovakia	3	3	4	4	4	3	4	4	2	3
Estonia	4	4	3	3	3	4	5	8	6	6
Slovenia	5	5	5	5	5	5	3	3	3	2
Latvia	6	6	6	6	7	8	9	13	11	7
Croatia	7	8	8	8	6	6	7	5	5	11
Lithuania	8	7	7	7	8	9	6	10	10	8
Hungary	9	9	9	9	10	13	10	7	9	5
Romania	10	10	10	11	11	10	11	9	8	9
Serbia	11	11	11	12	12	11	12	11	13	14
Bulgaria	12	12	12	14	14	12	13	12	12	12

PRESTIŻ _ PRESTIGE

USŁUGI _ SERVICE

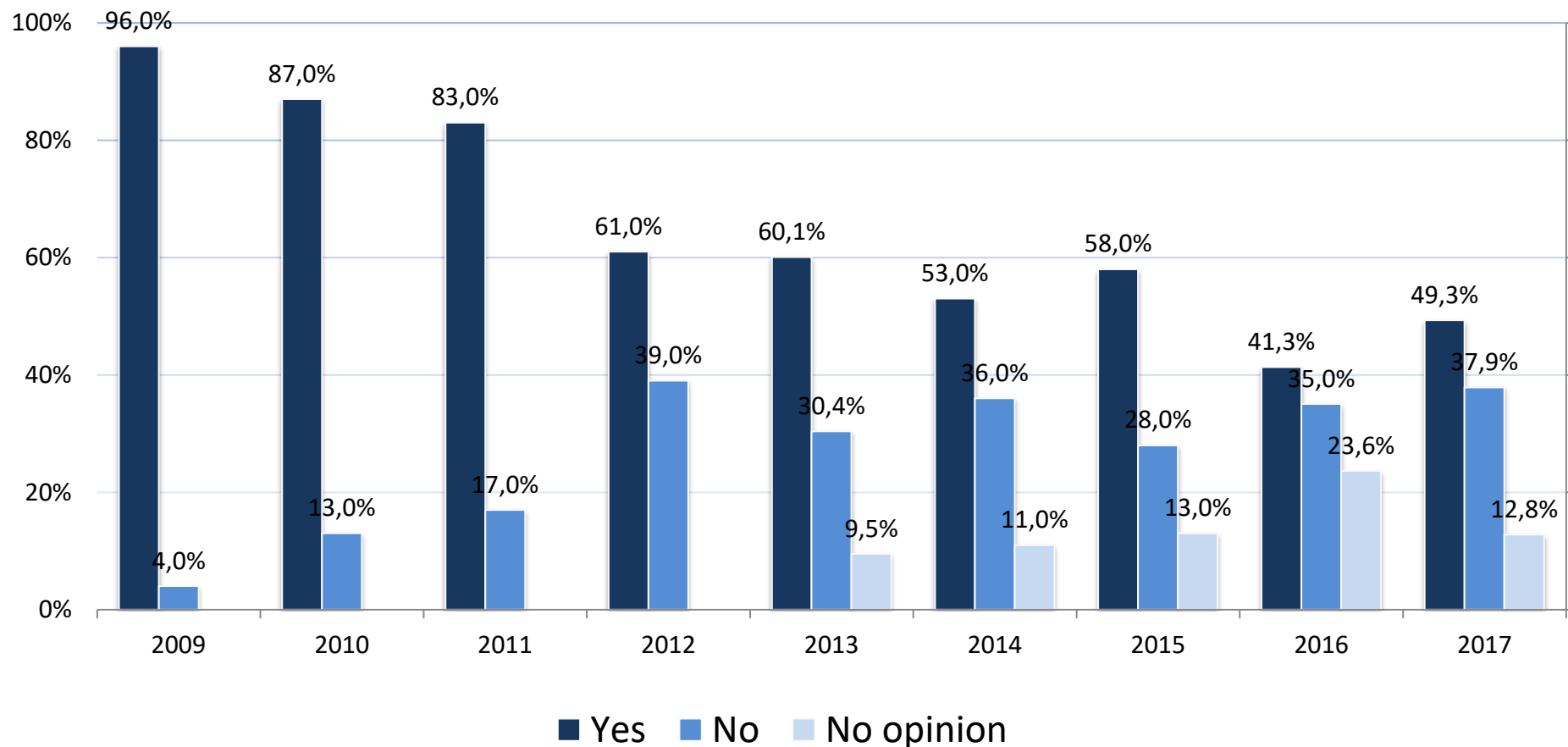
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Are you in favour of introducing the Euro in Poland?



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Thank you for your attention

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