

# Economic Survey 2018

Poland in the eyes of foreign investors

 **BIQSTAT**®  
MORE THAN STATISTICS



# IGCC

International Group  
of Chambers of Commerce

# International Group of Chambers of Commerce in Poland





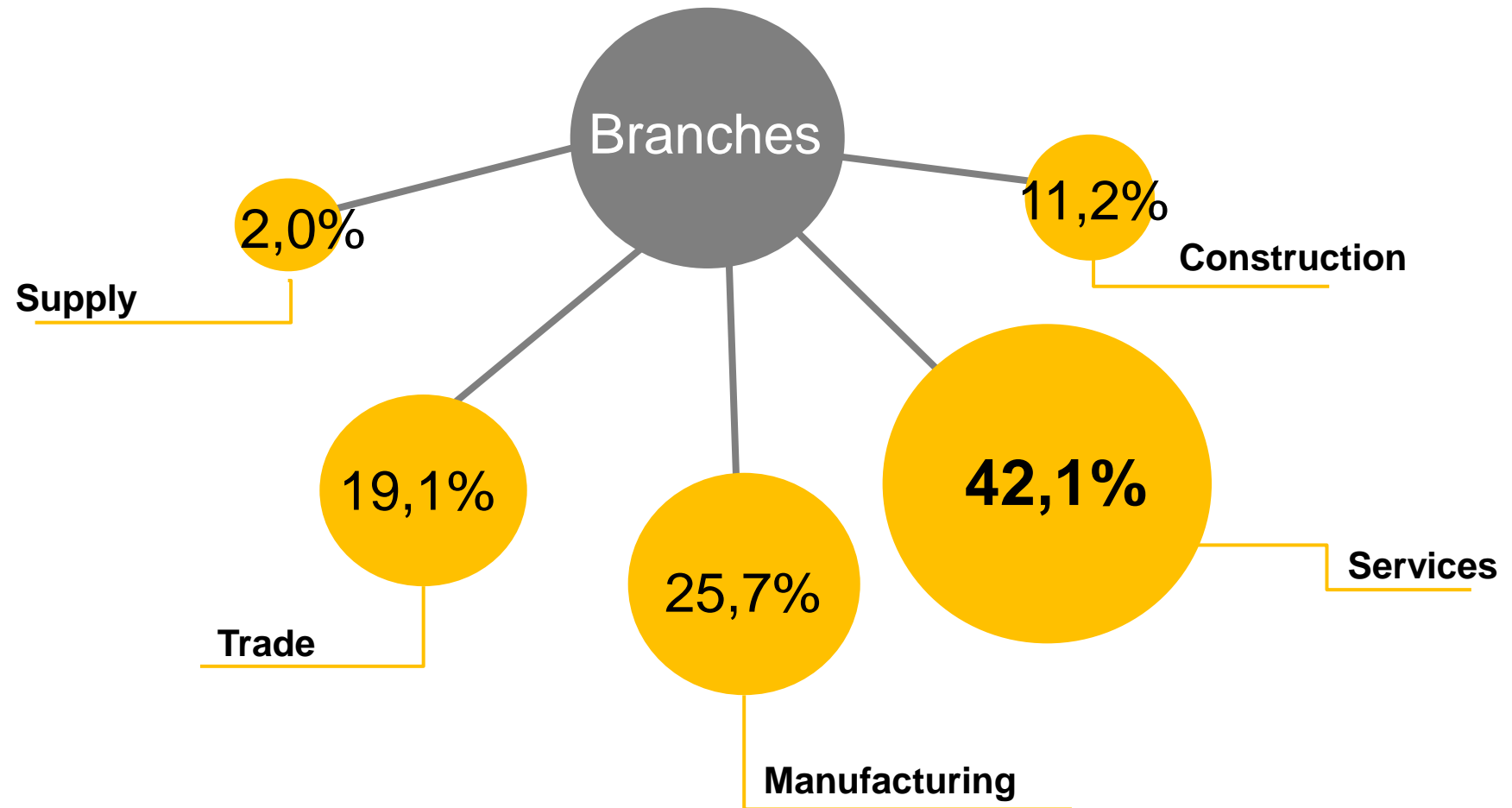


## Part I

# Characteristics of the surveyed companies

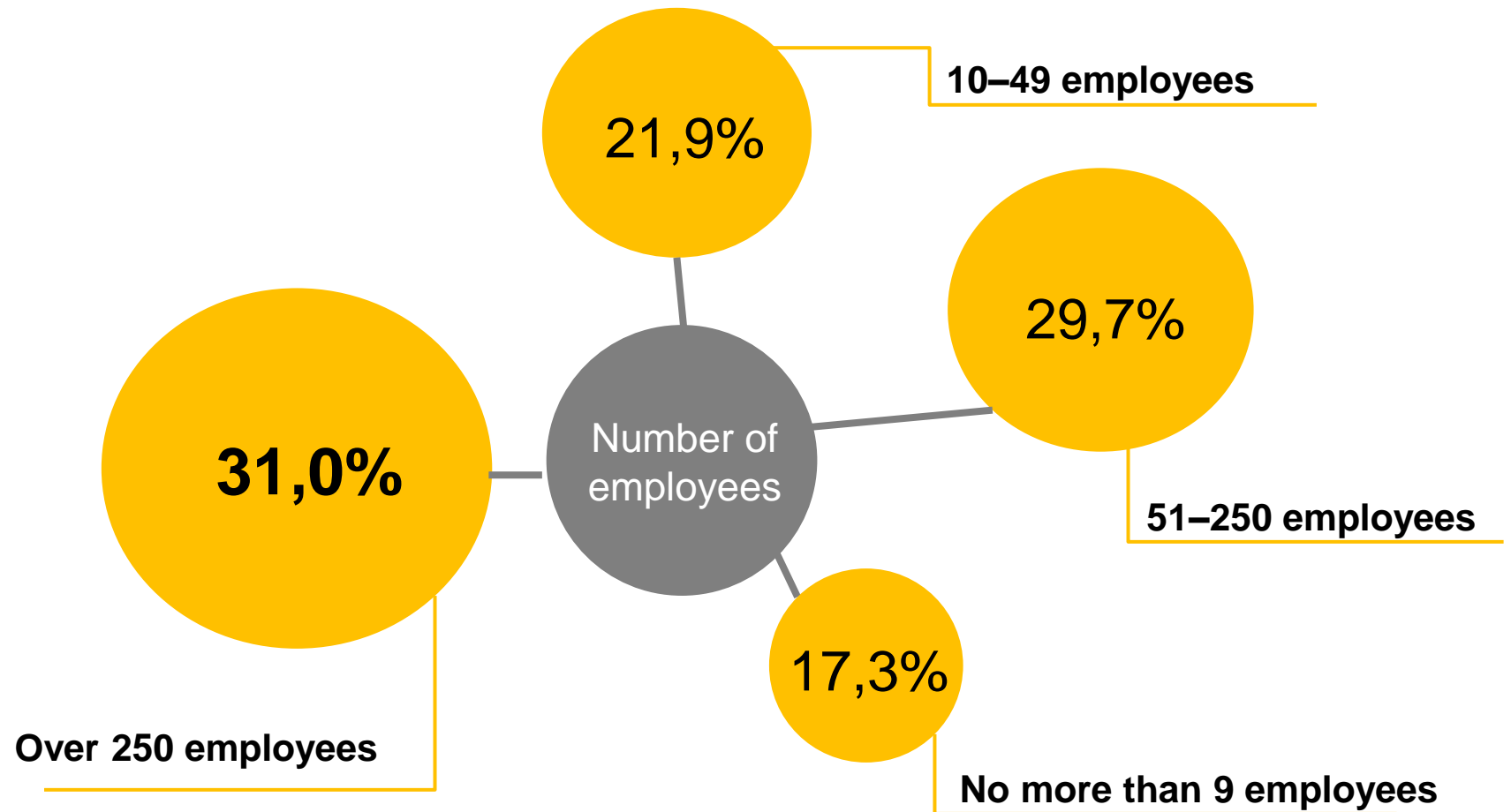
## Structure of respondents - branches.

Economic Survey  
2018



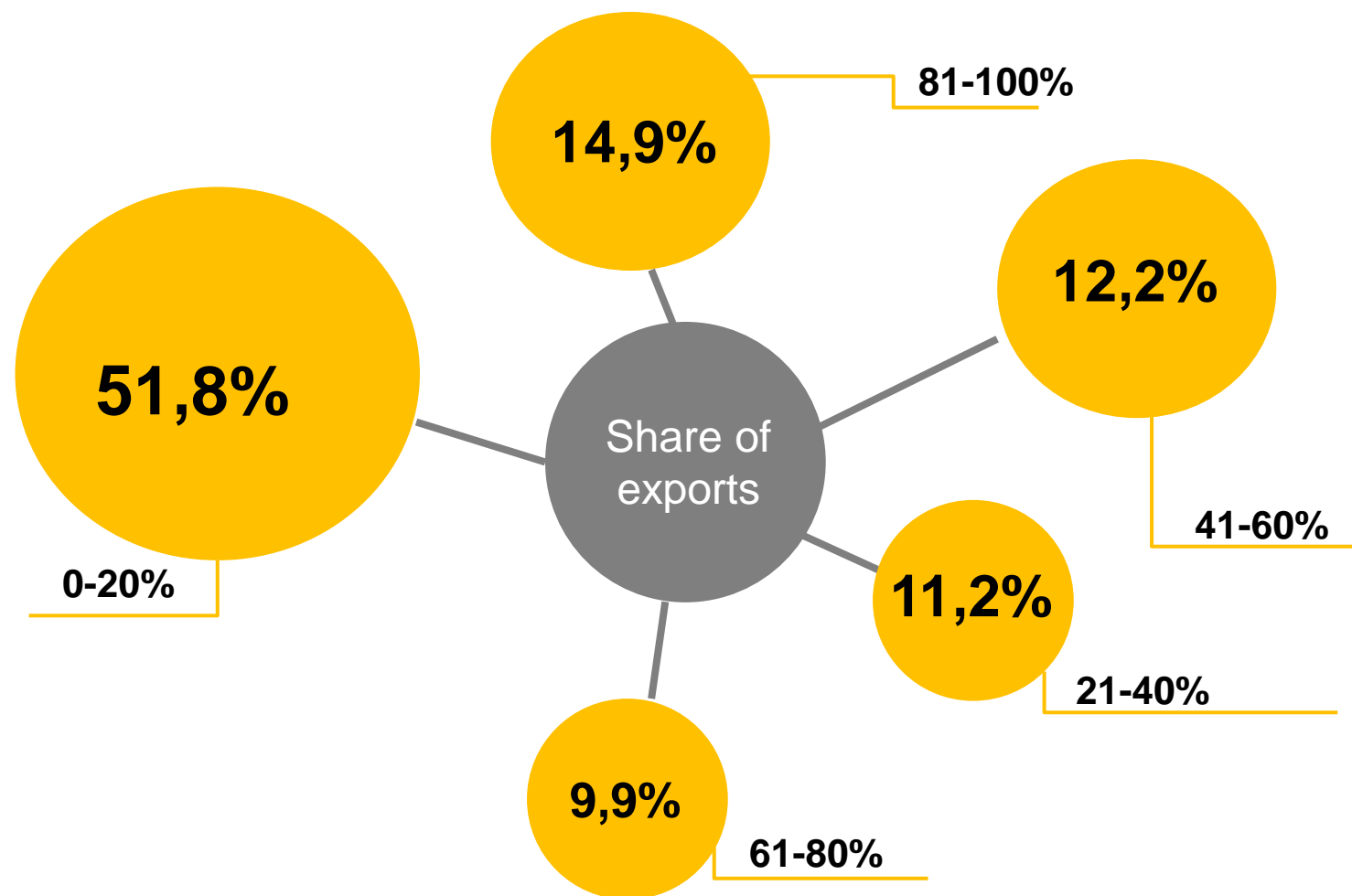
Structure of  
respondents –  
number of  
employees.

Economic Survey  
2018



Structure of  
respondents – share  
of exports in total  
turnover.

Economic Survey  
2018





## Part II

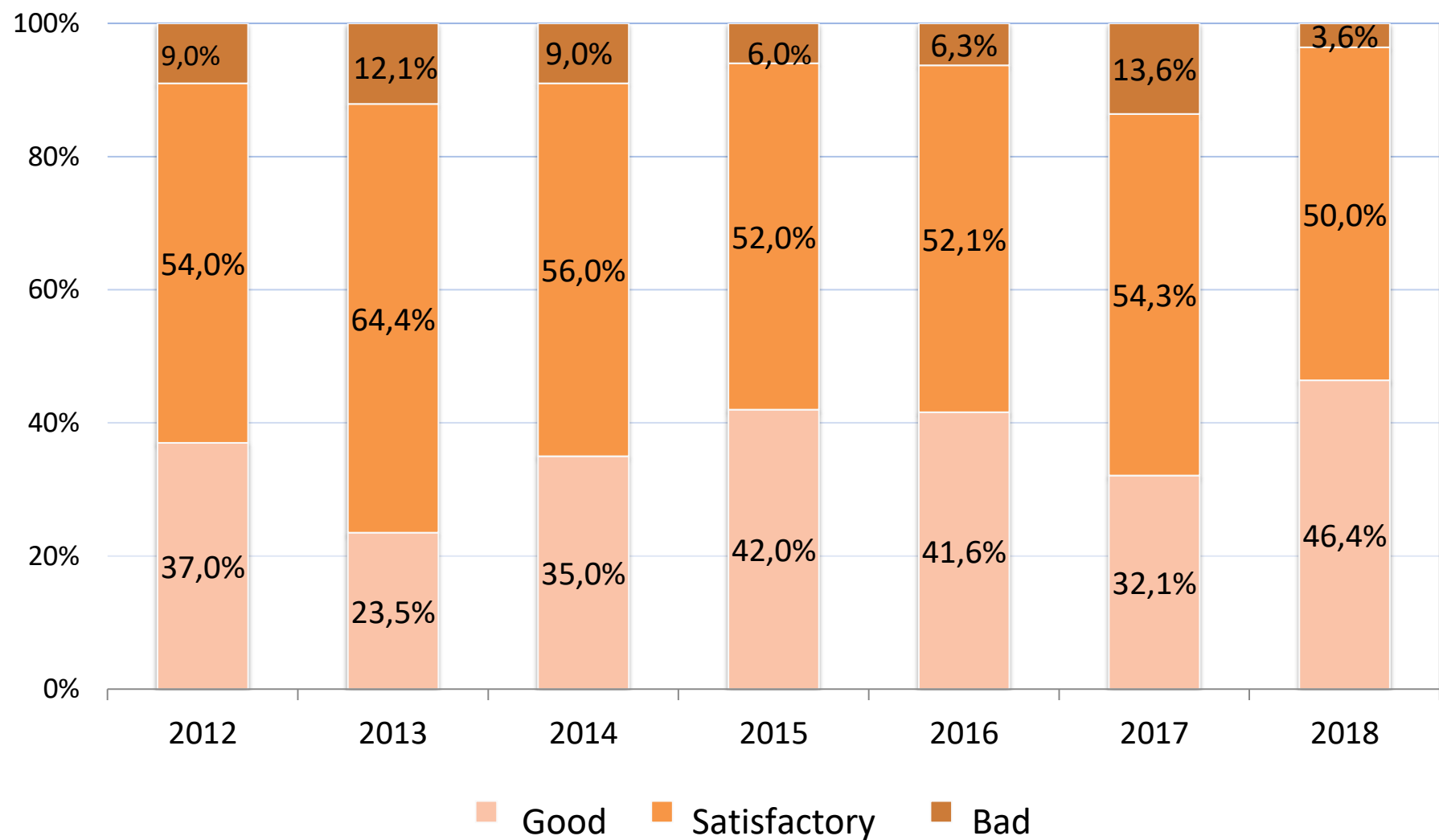
## Economic situation in Poland



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

Comparison to the  
previous editions of the  
survey

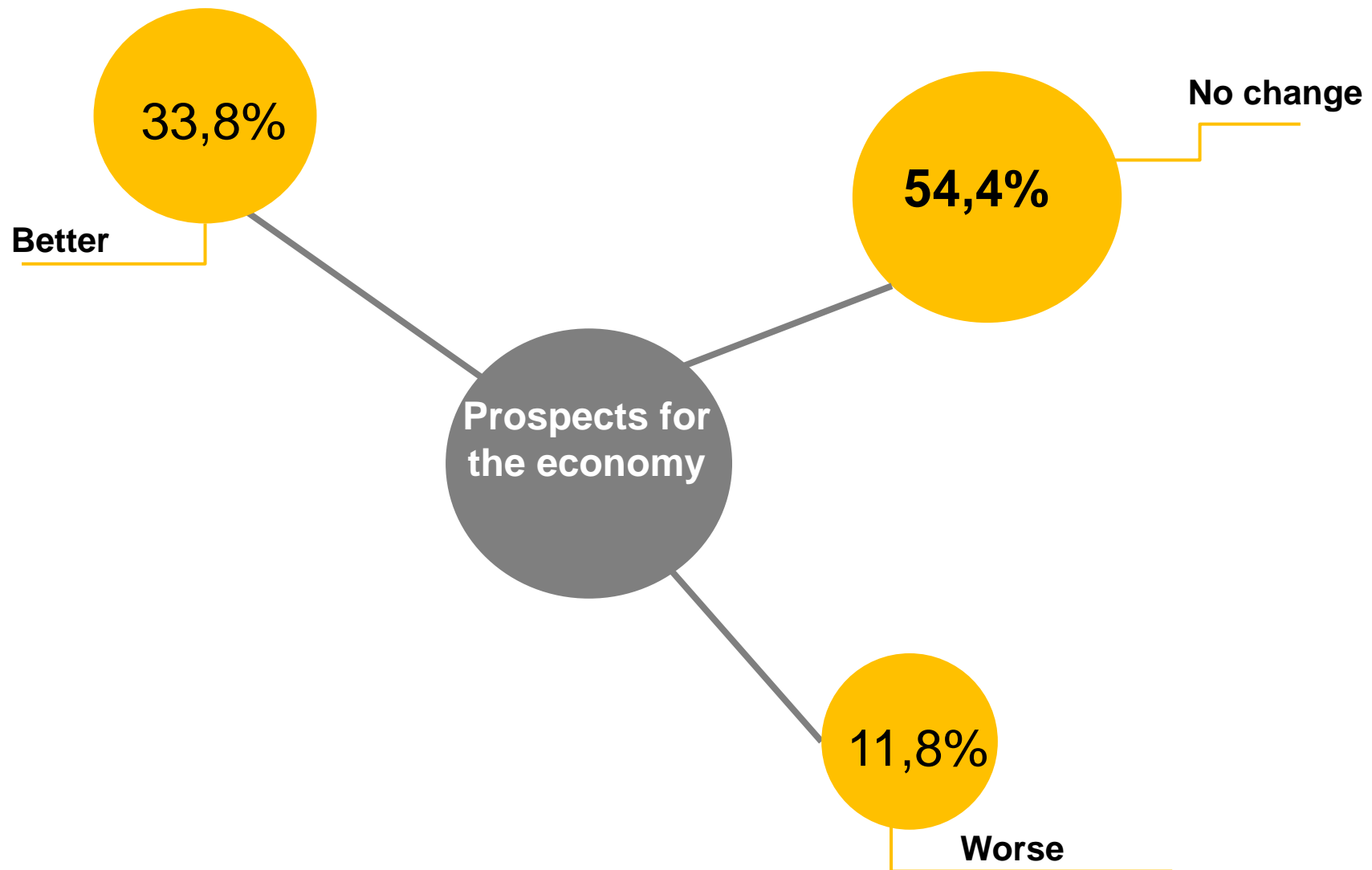
Economic Survey  
2018





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

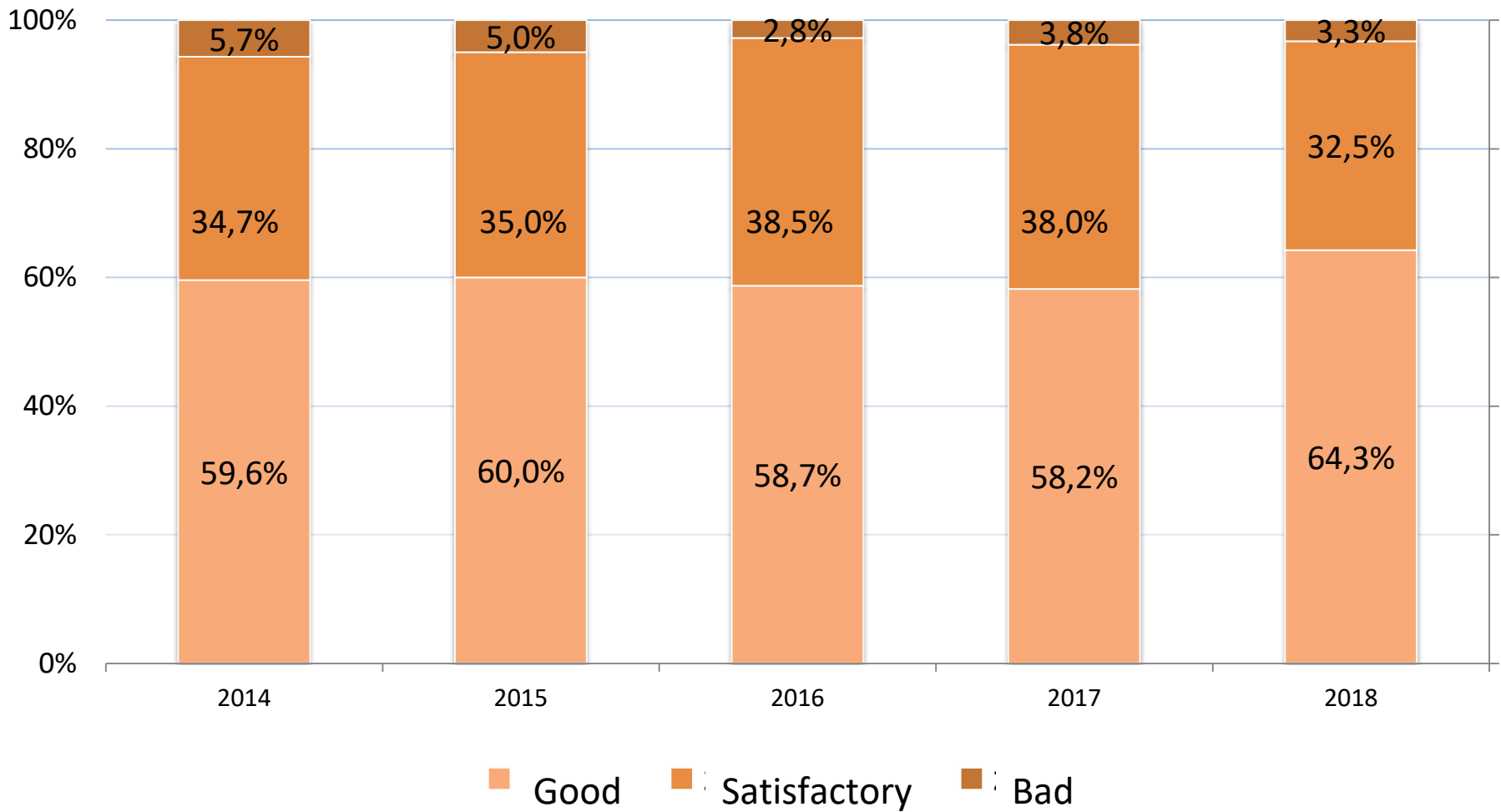
Economic Survey  
2018



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

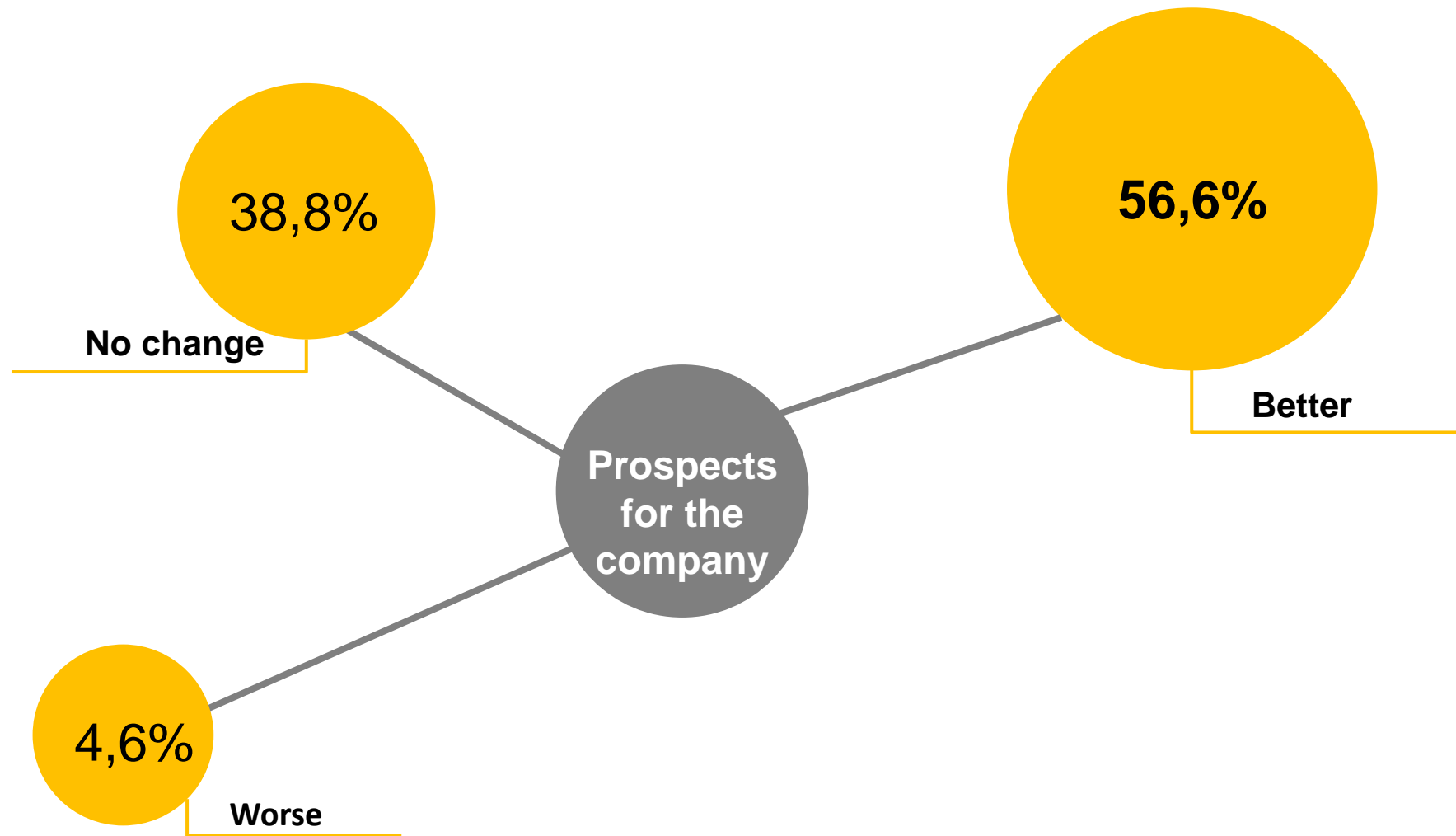
Comparison to the previous editions of the survey

Economic Survey  
2018



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

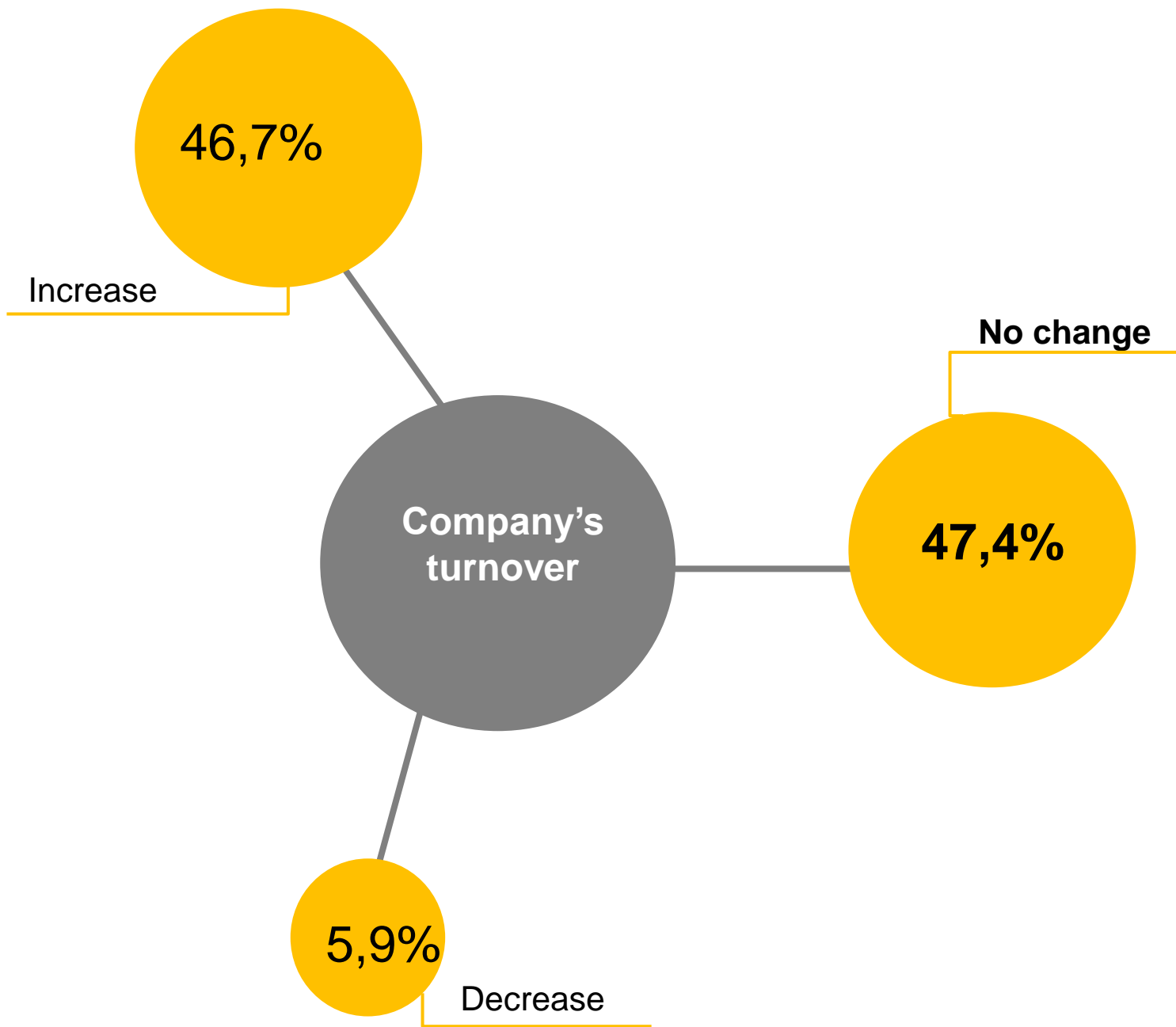
Economic Survey  
2018





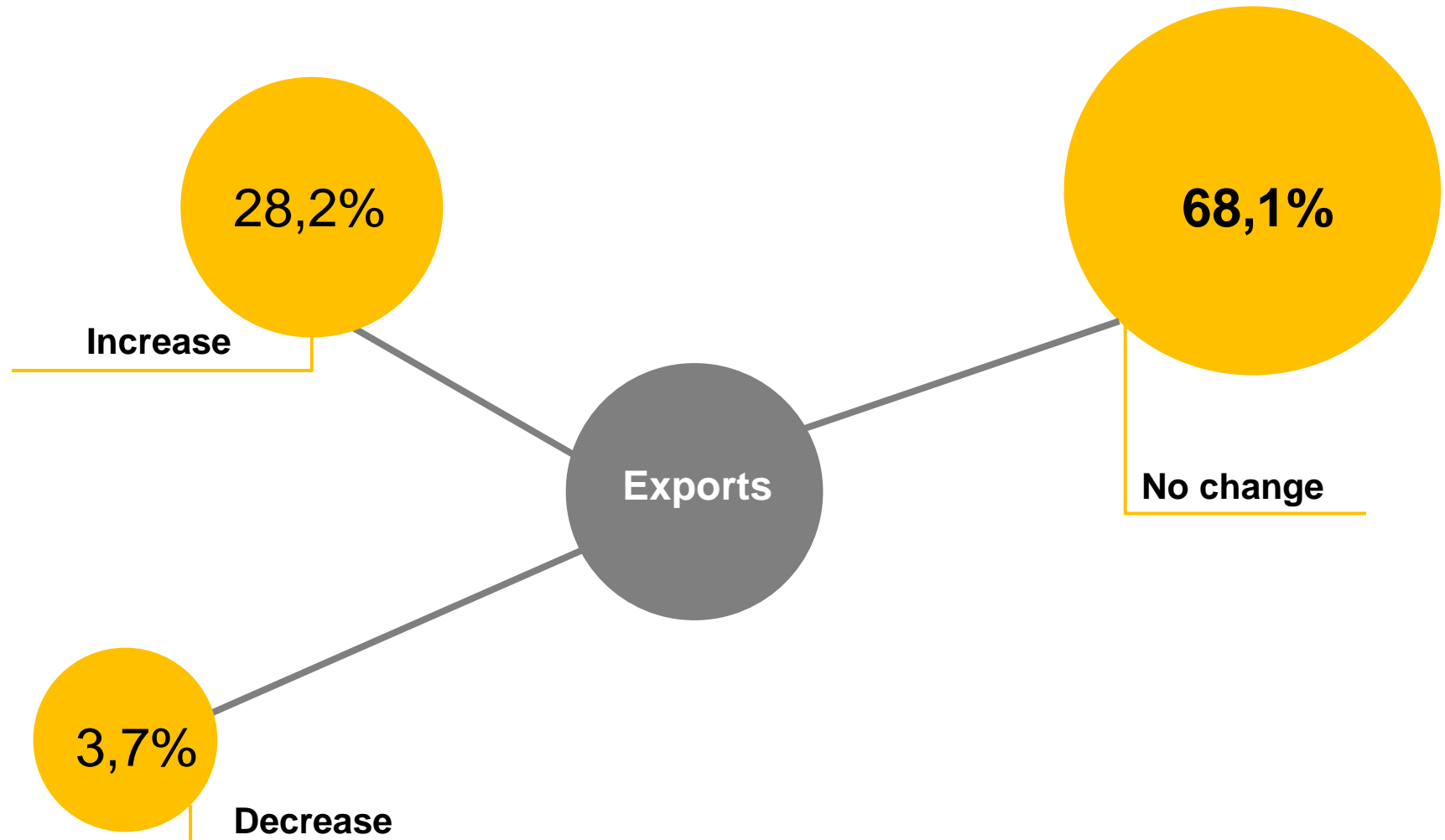
What are the prospects for your company's turnover in 2018 compared to 2017?

Economic Survey  
2018



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

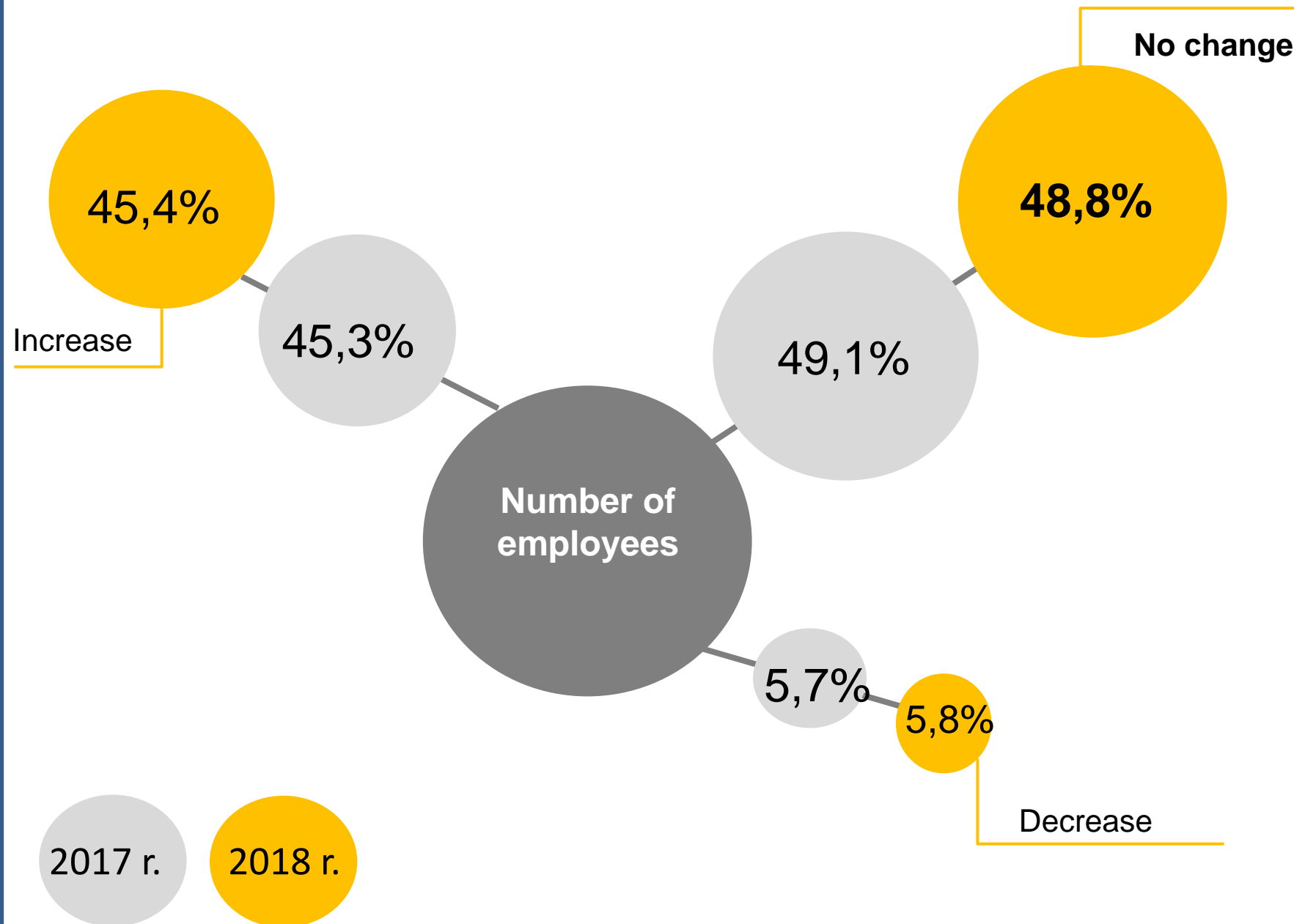
Economic Survey  
2018



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

Comparison to the previous  
edition of the survey

Economic Survey  
2018

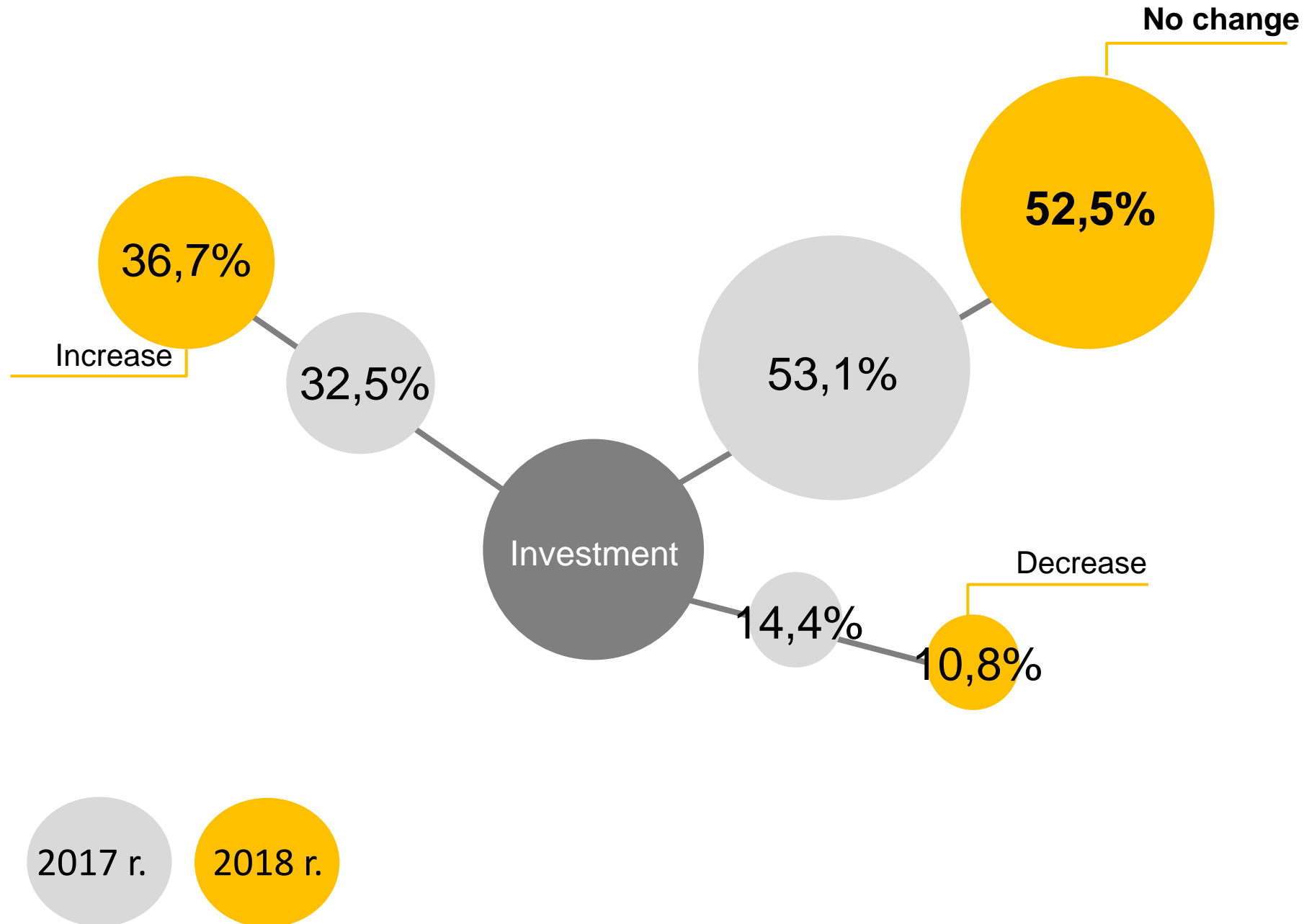




What are the prospects for your company's expenditure on investment in 2018 compared to 2017?

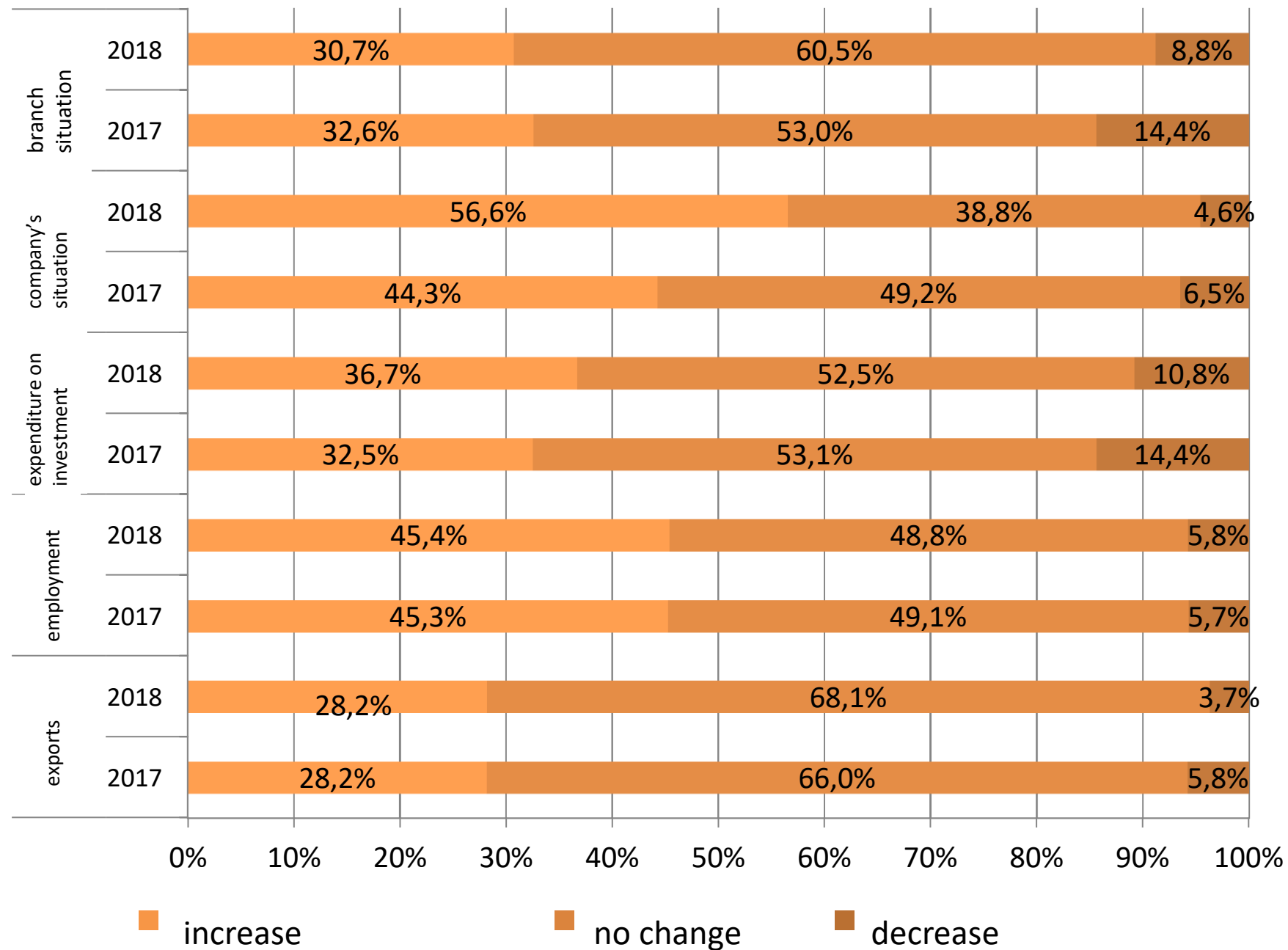
Comparison to the previous edition of the survey

Economic Survey  
2018



# Prospects for the companies in 2018 and 2017

Economic Survey  
2018





## Part III

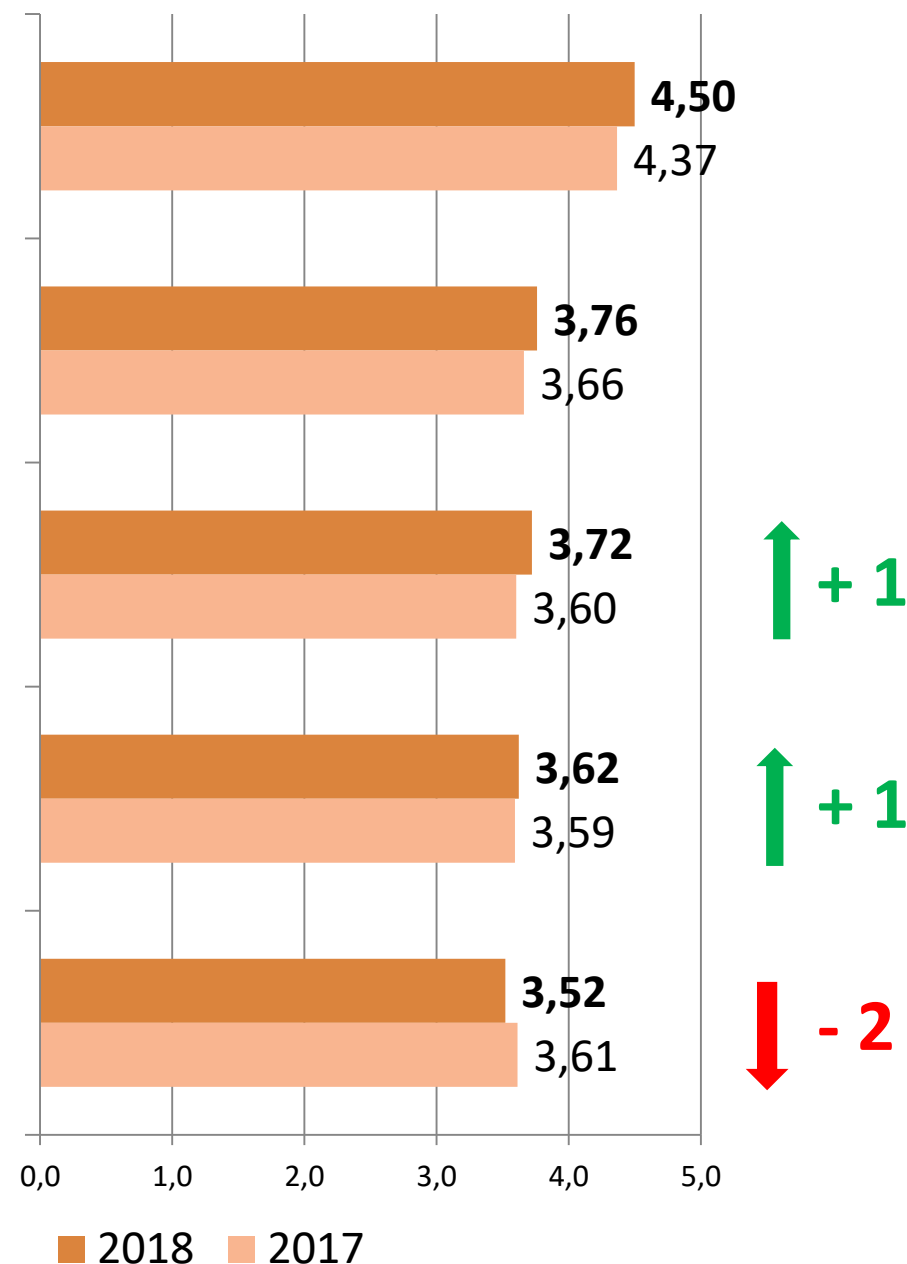
## Investment factors



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

Economic Survey  
2018

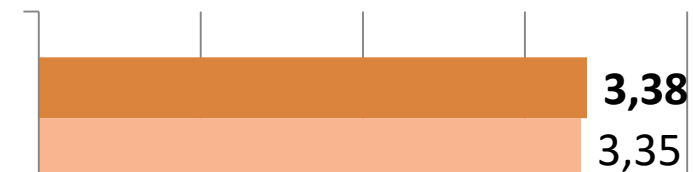
1. EU membership
2. Employees' qualifications
3. Higher education
4. Employees' motivation  
and productivity
5. Quality and availability of  
local suppliers



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

Economic Survey  
2018

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



■ 2018 ■ 2017

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

Economic Survey  
2018

11. Fight against corruption  
and crime

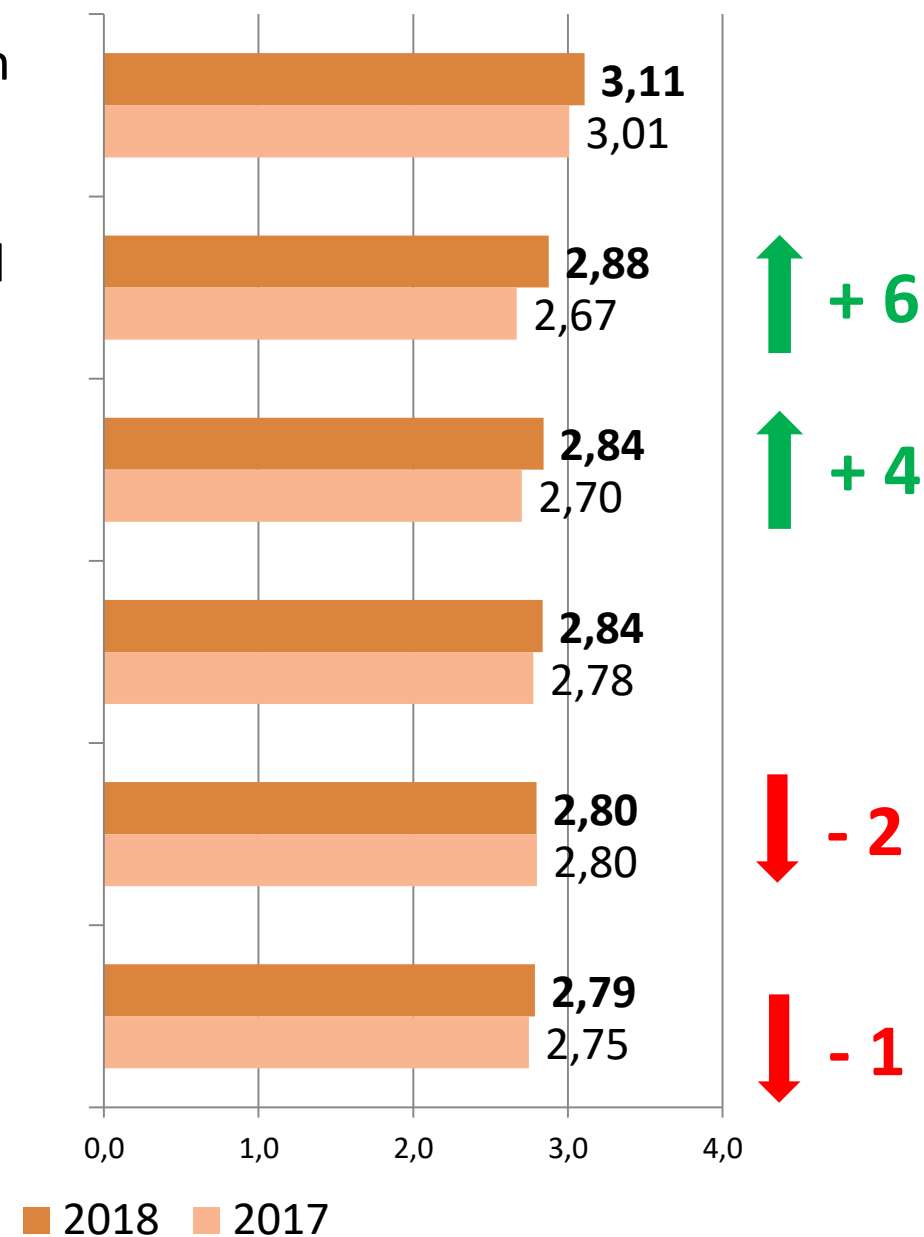
12. Adequacy of vocational  
training

13. Legal flexibility of  
employment

14. Public administration

15. Transparency of open  
invitations to tender

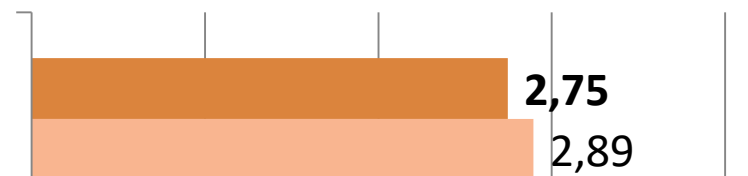
16. Legal safety



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

Economic Survey  
2018

17. Availability of specialised  
staff



↓ - 5

18. Tax burden



↓ - 2

19. Tax system and tax  
administration



20. Predictability of economic  
policies



↑ + 1

21. Political and social stability



↓ - 1

■ 2018 ■ 2017



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

Economic Survey  
2018

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

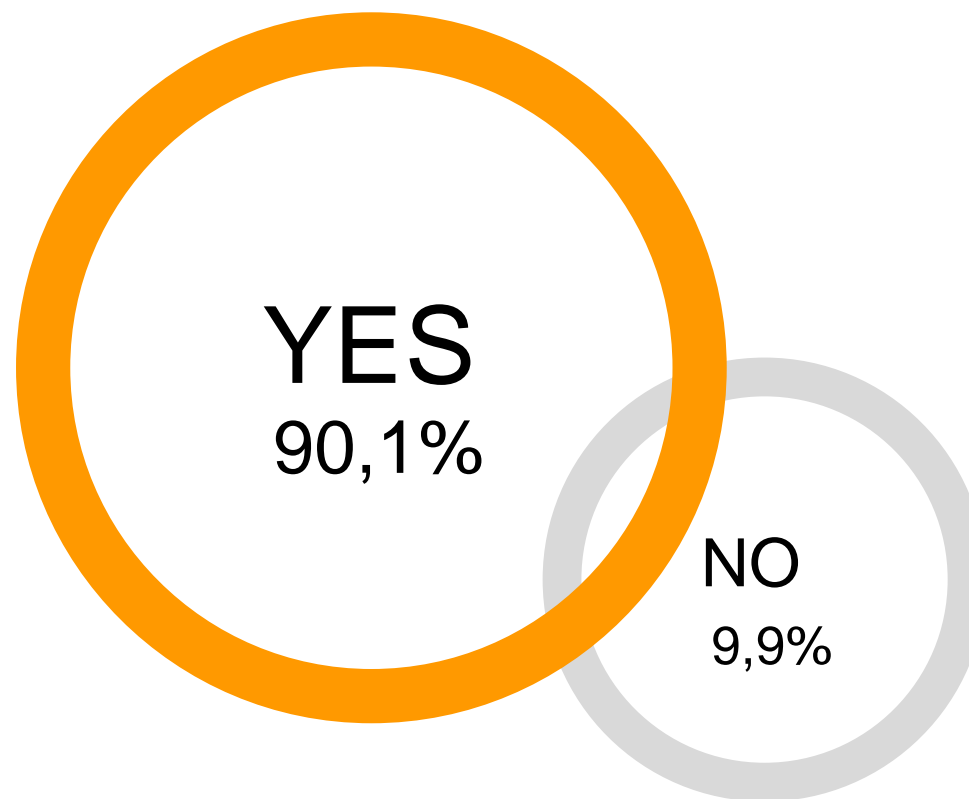


## Part IV

## Investment attractiveness

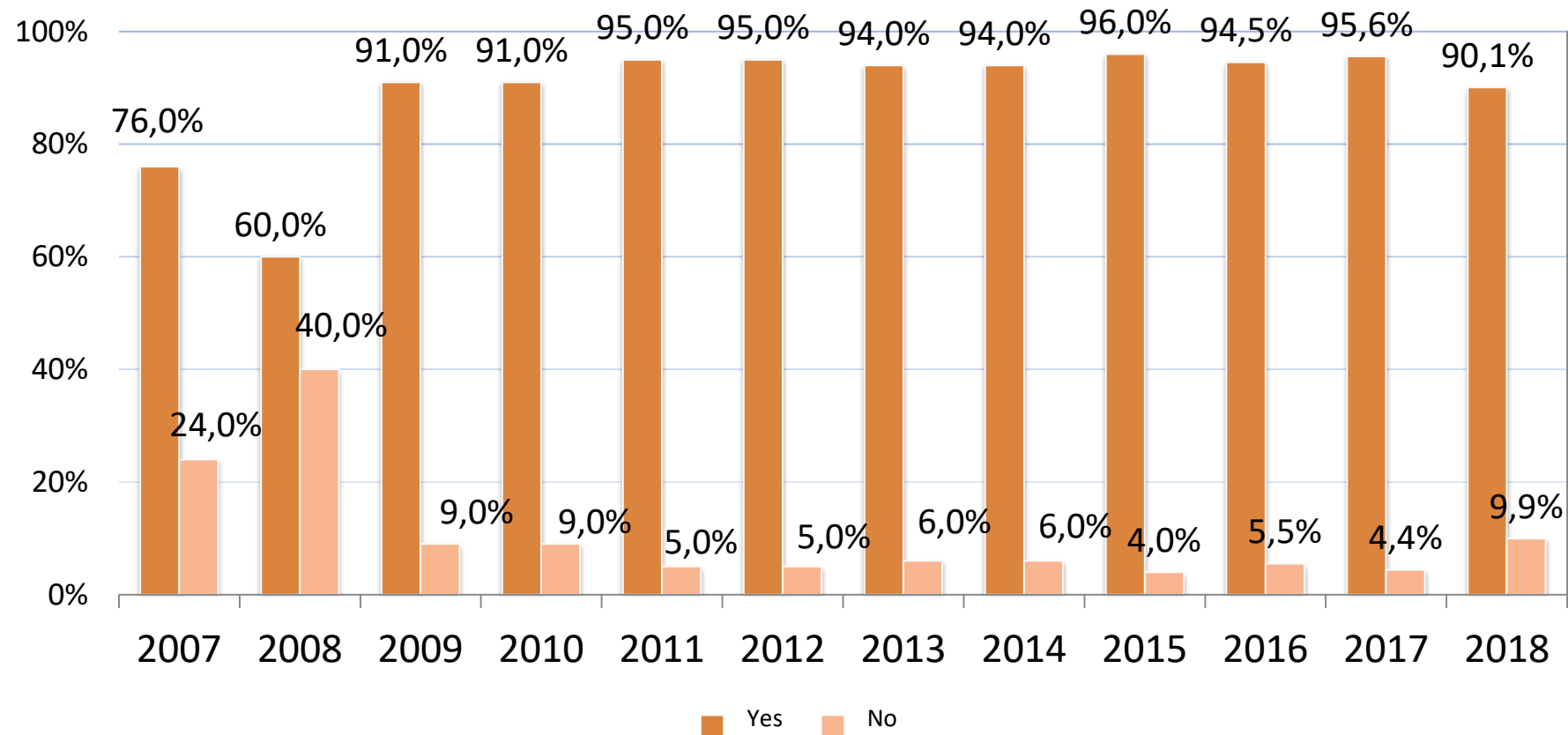
Would you invest  
in Poland again?

Economic Survey  
2018



# Would you invest in Poland again?

Economic Survey  
2018

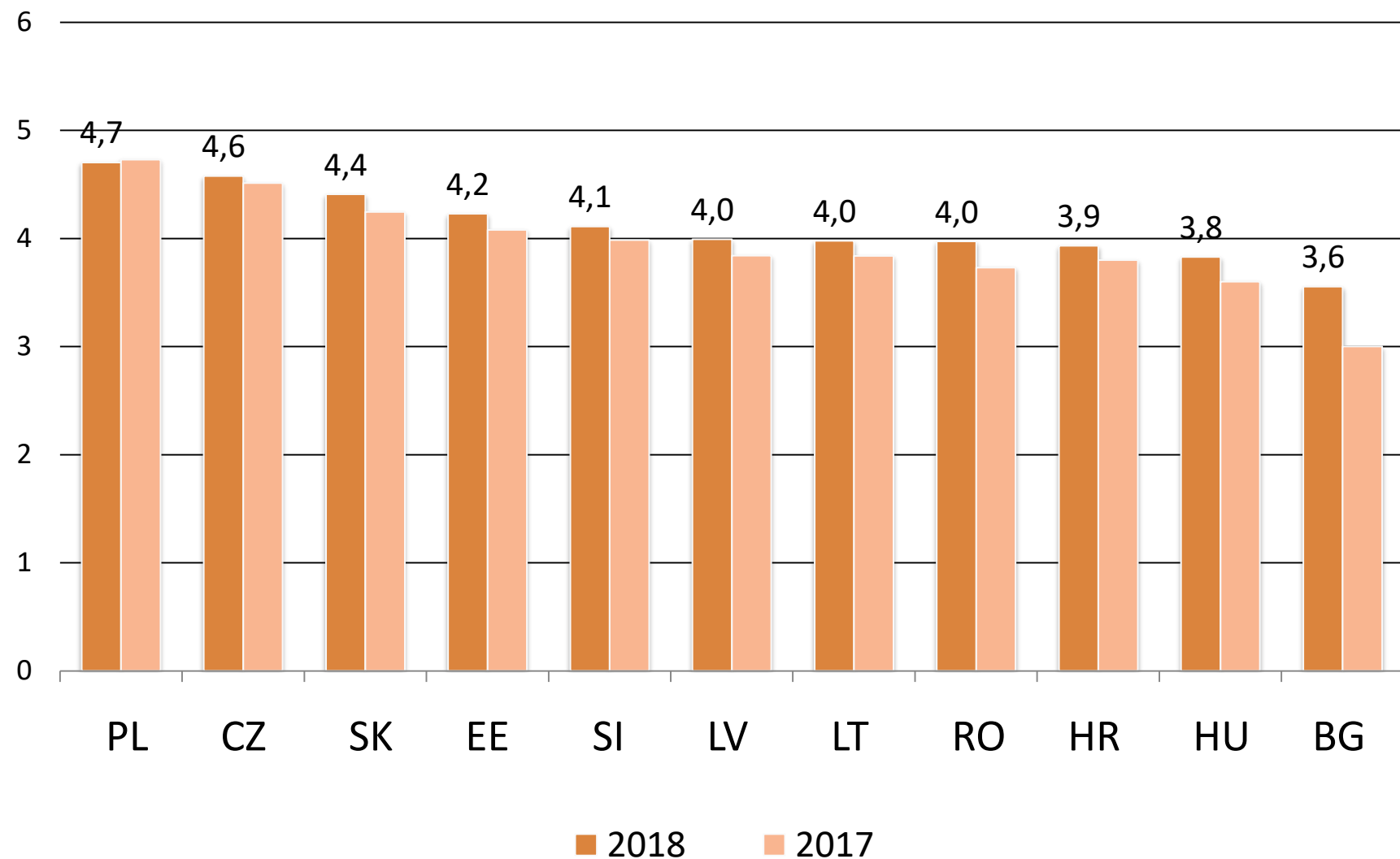




Investment  
attractiveness of CEE  
countries in 2018  
according to 300  
investors from Poland

6 – very attractive  
1 – not attractive at all

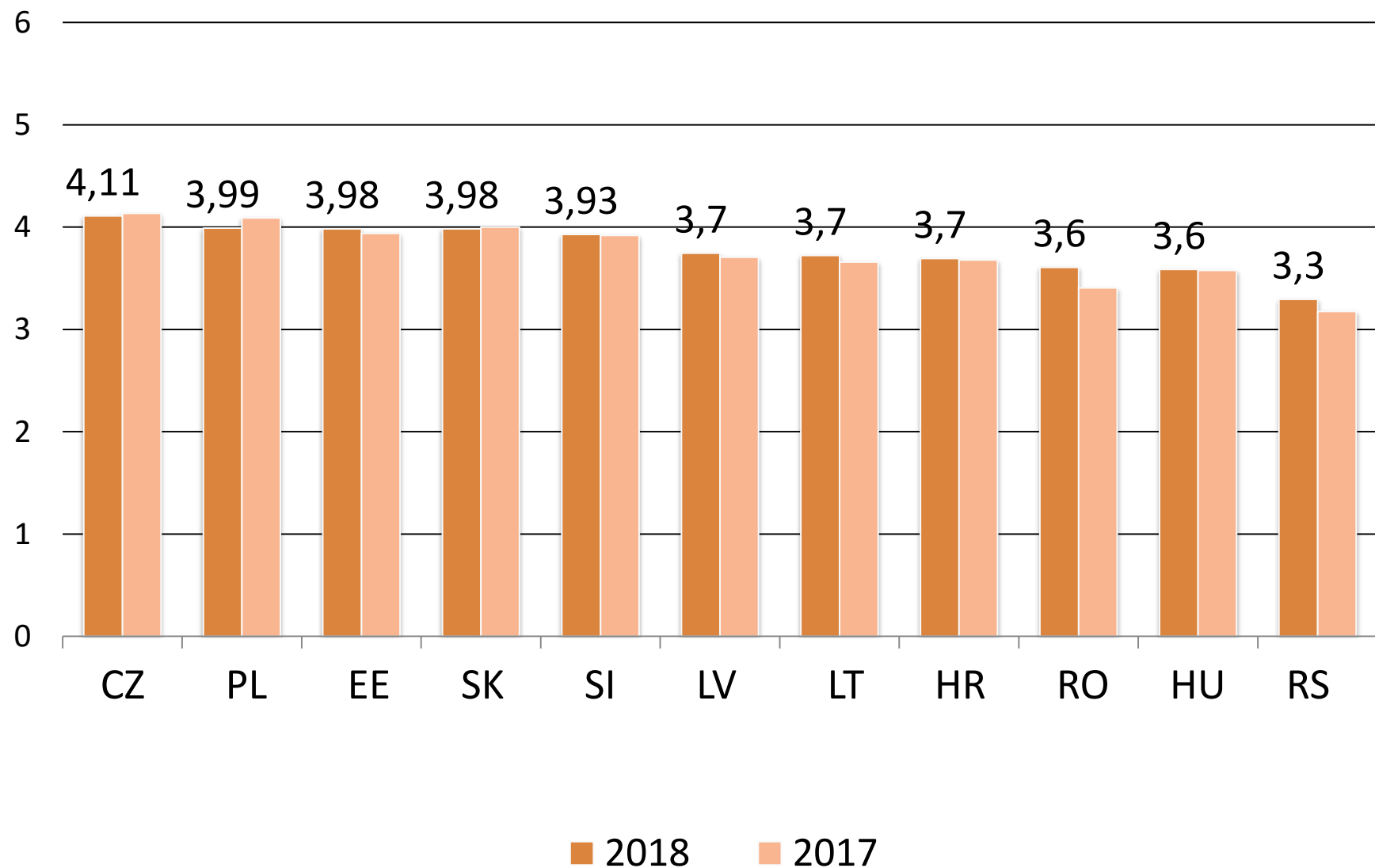
Economic Survey  
2018



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

6 – very attractive  
1 – not attractive at all

Economic Survey  
2018



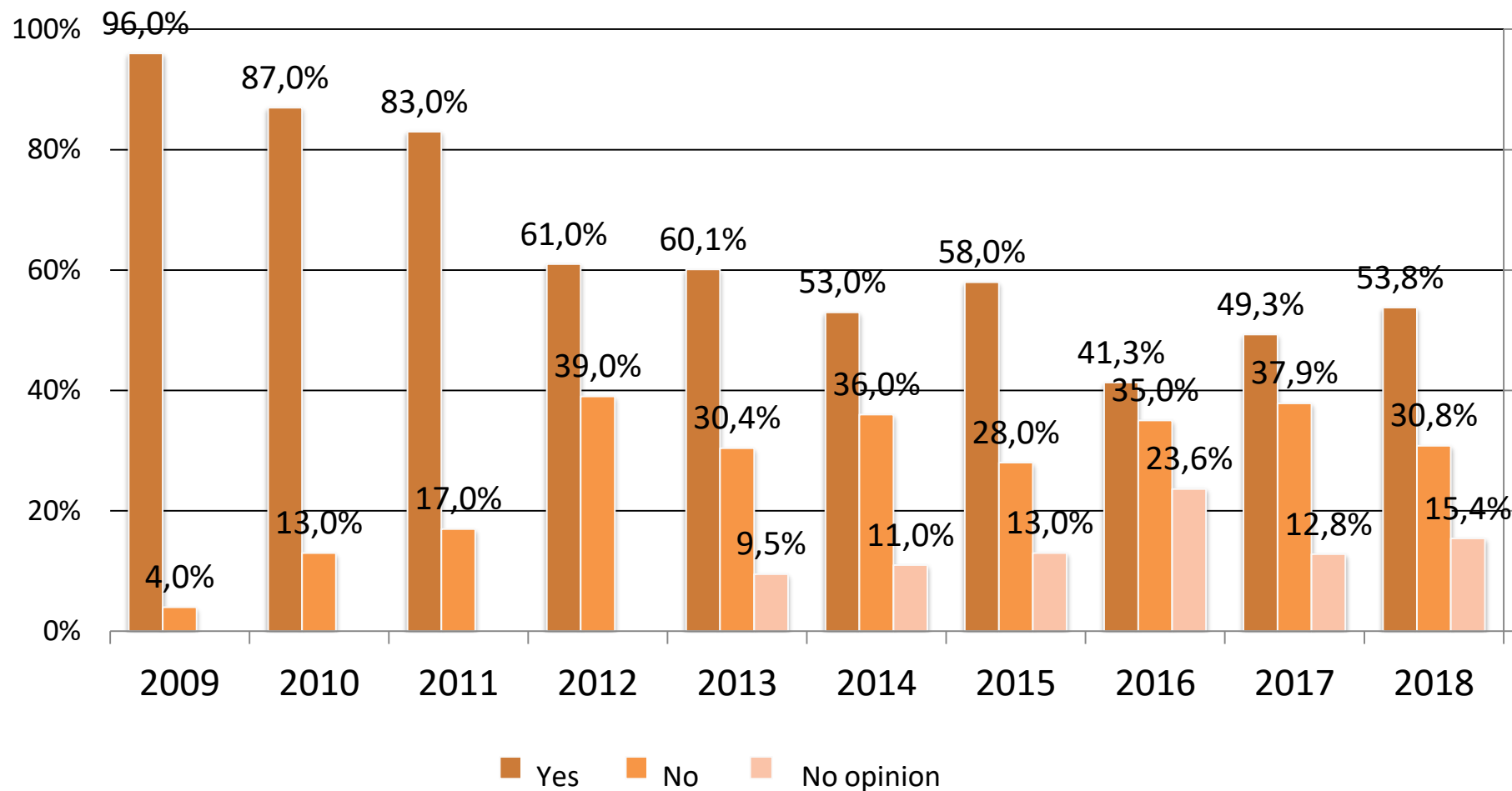
Investment  
attractiveness of  
CEE countries  
according to  
investors from the  
whole region

Economic Survey  
2018

Country	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
Czechia	1	1	1	2	2	2	1	1	1	1
<b>Poland</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>4</b>
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?

Economic Survey  
2018





# Thank you for your attention!

---

Economic Survey  
2018

