

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

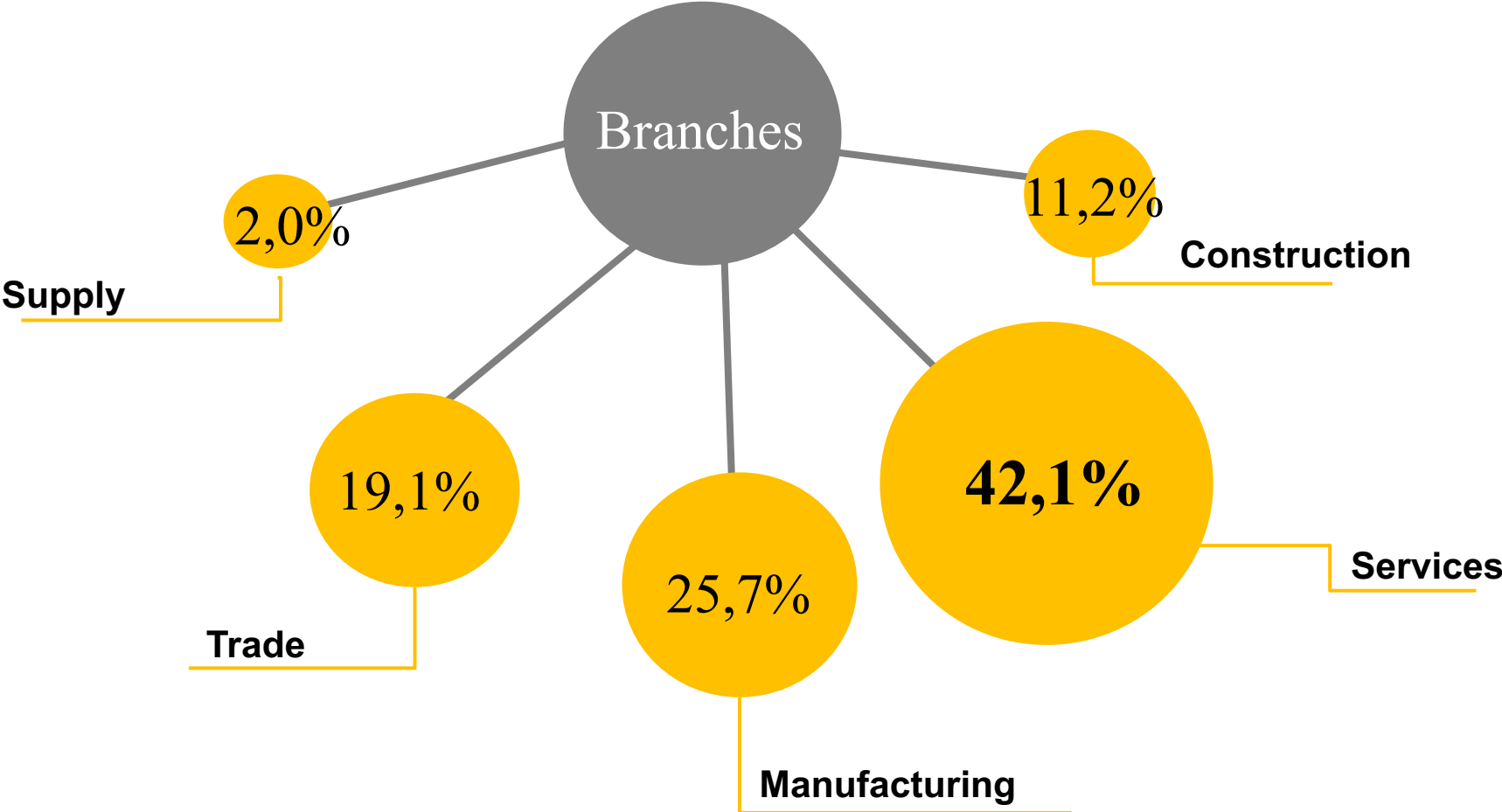




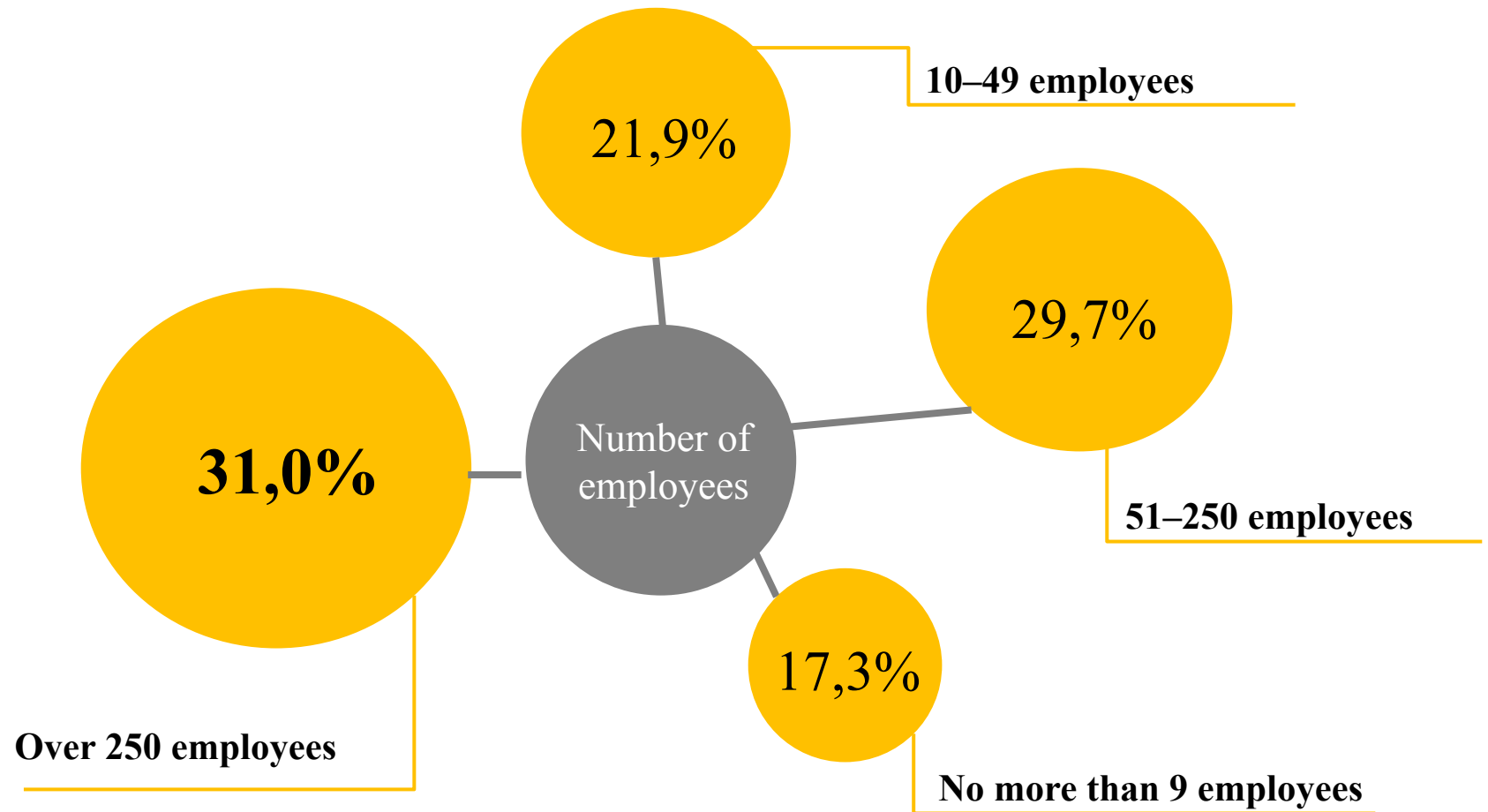
Part I

Characteristics of the surveyed  
companies

Structure of respondents - branches.

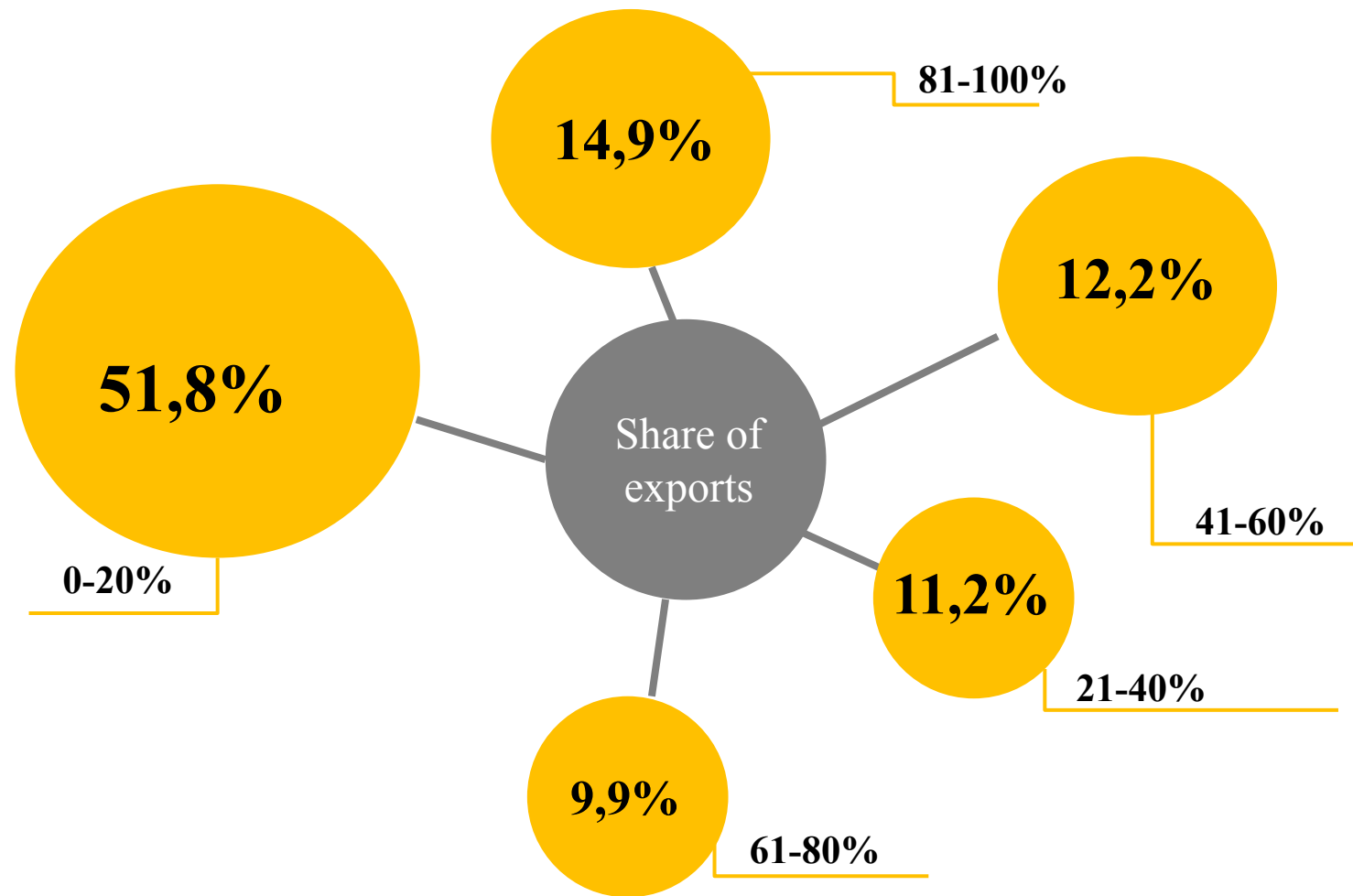


Structure of respondents – number of employees.



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Structure of respondents – share of exports in total turnover.





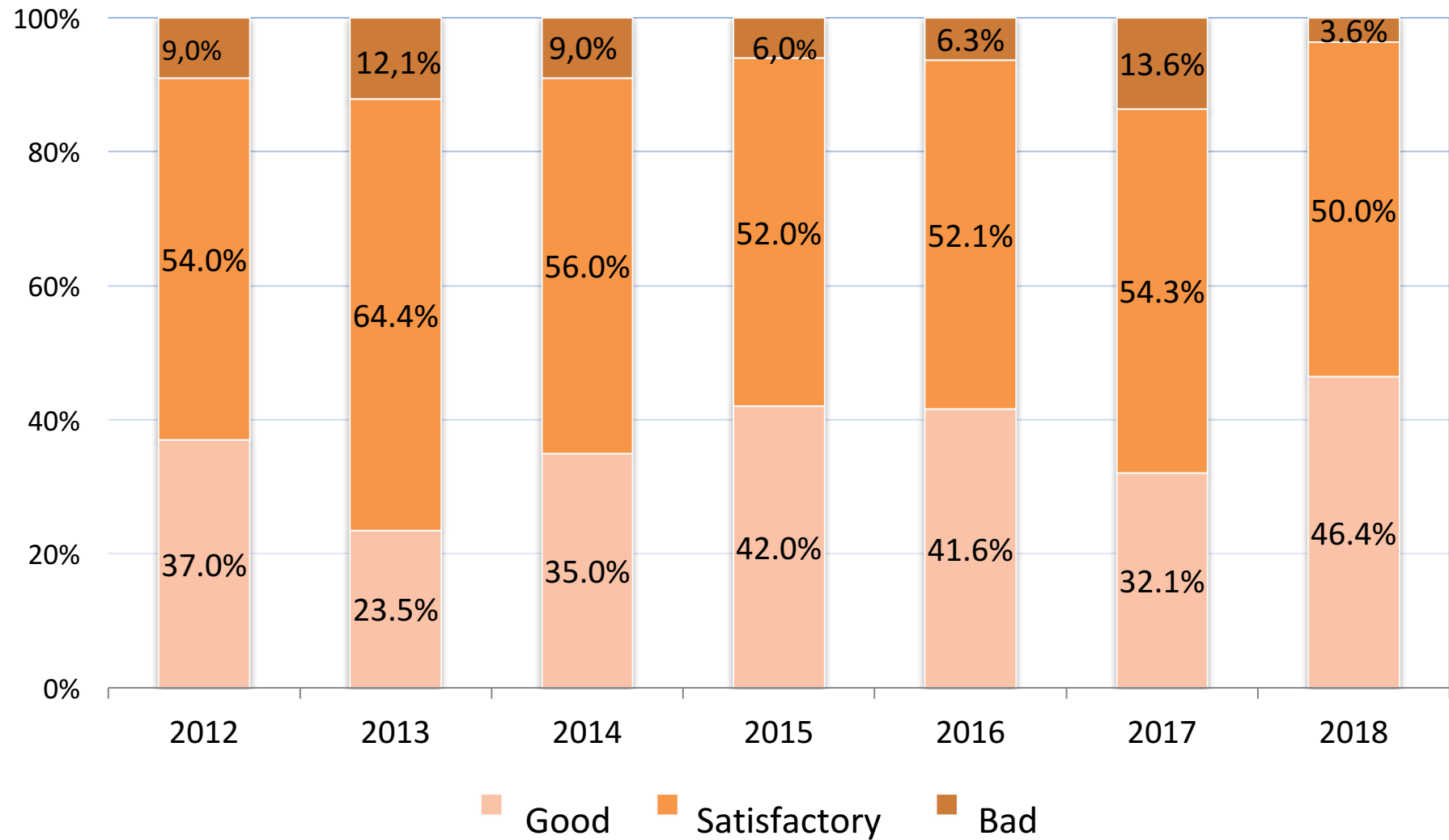
Part II

Economic situation in Poland

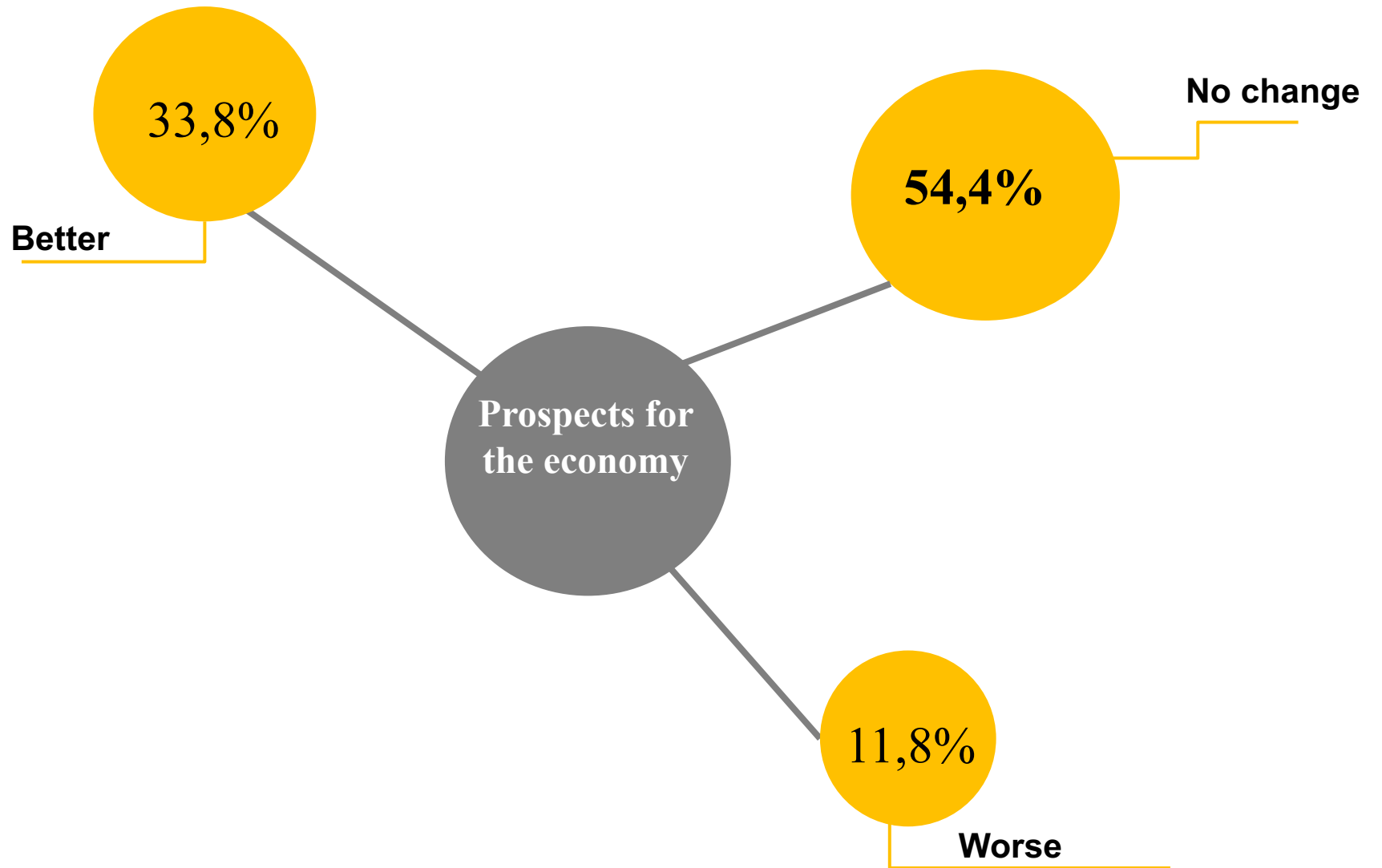
# How do you evaluate the current state of the Polish economy?

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?

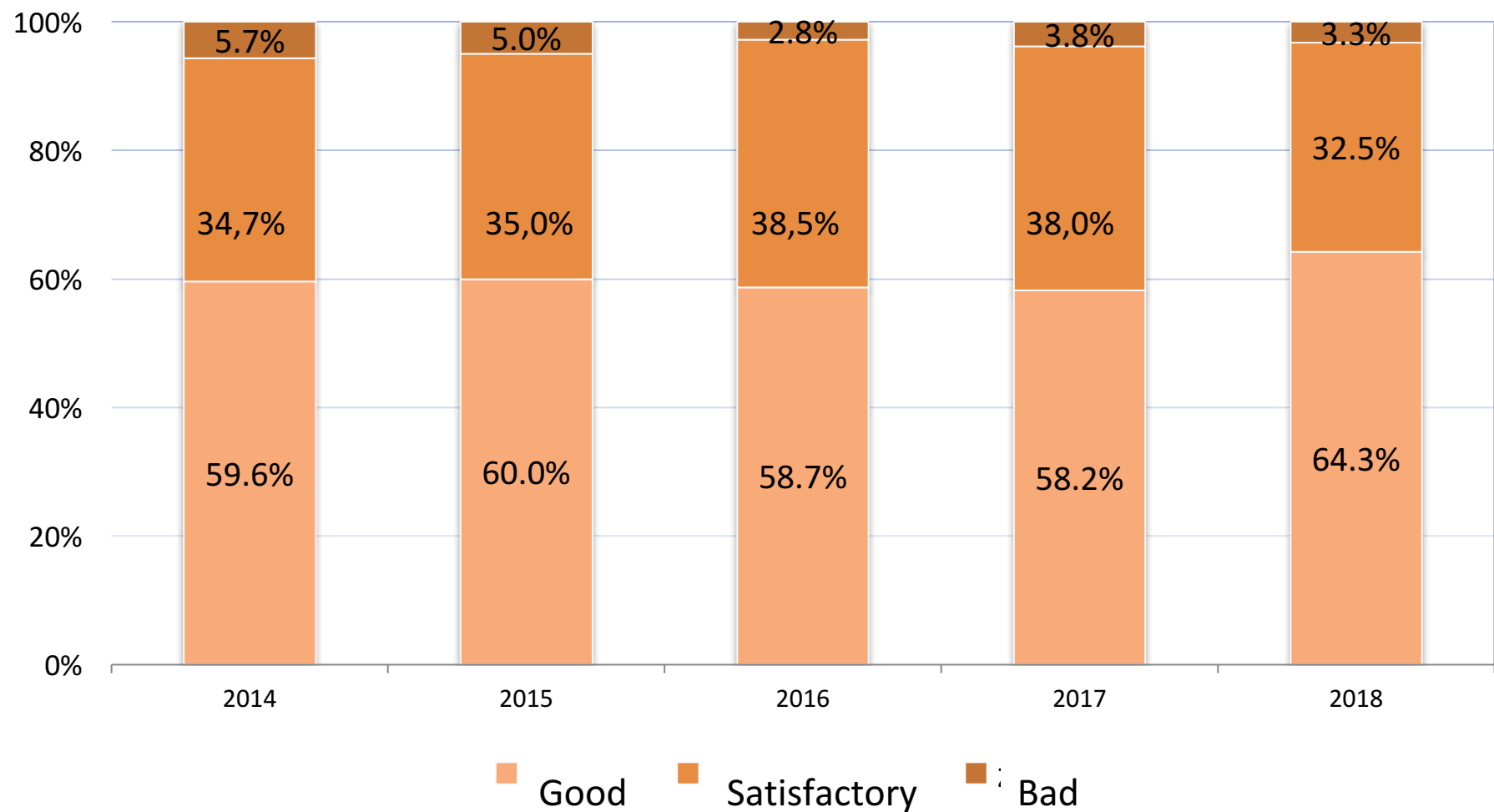


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2018

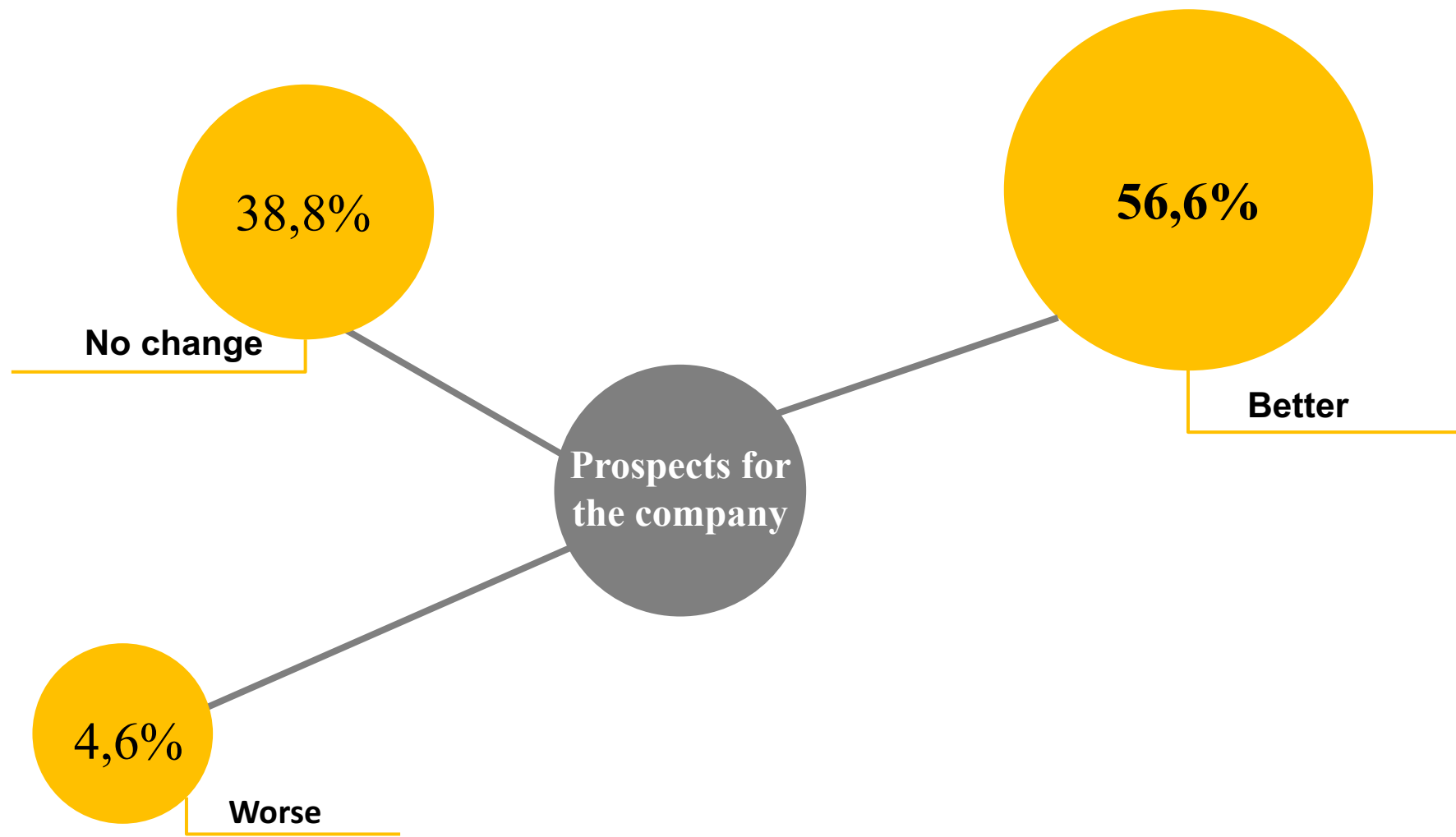
# How do you evaluate the current economic situation of your company?

Comparison to the previous editions of the survey

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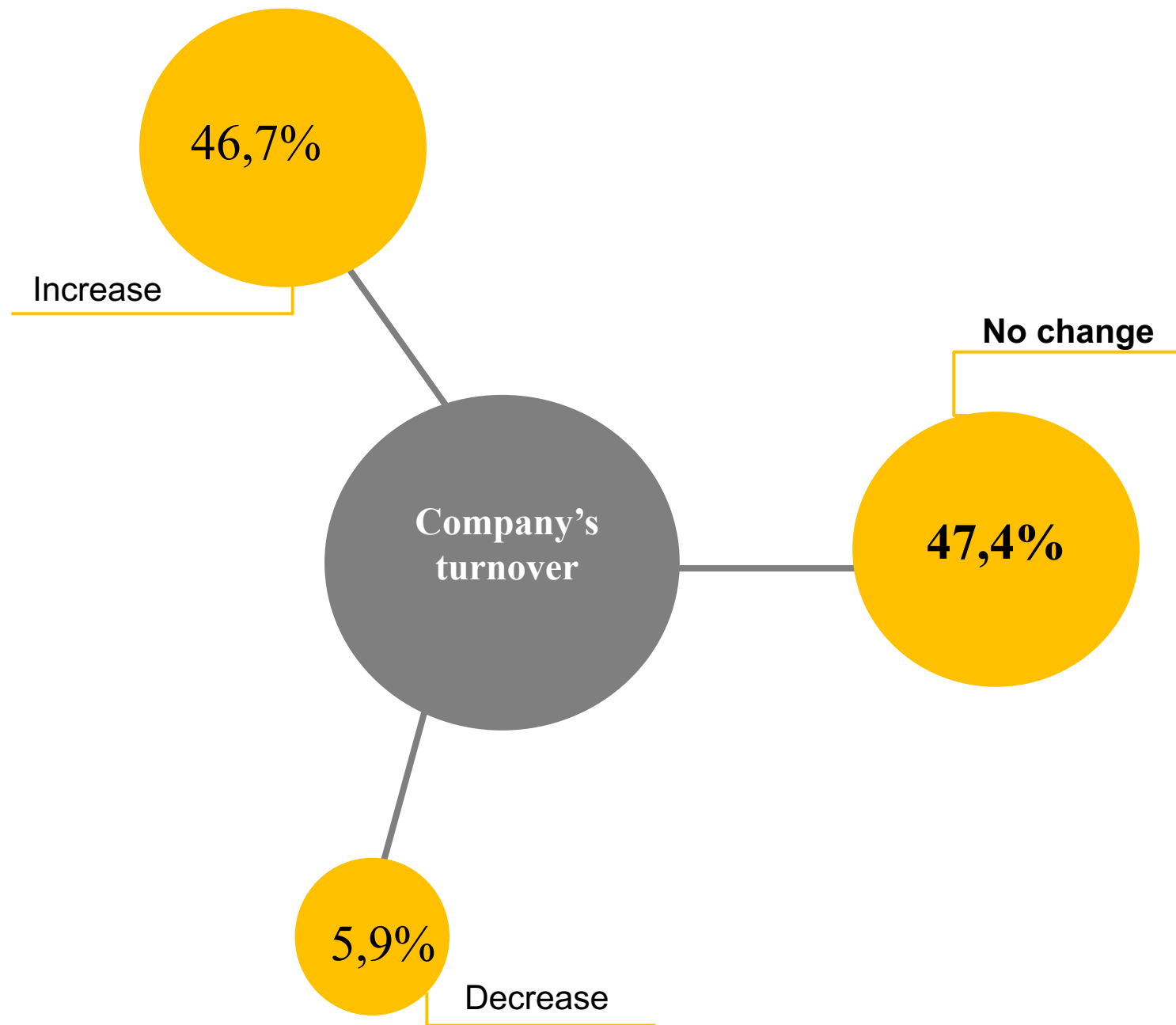
What are the prospects  
for your company in  
2018 compared to 2017?



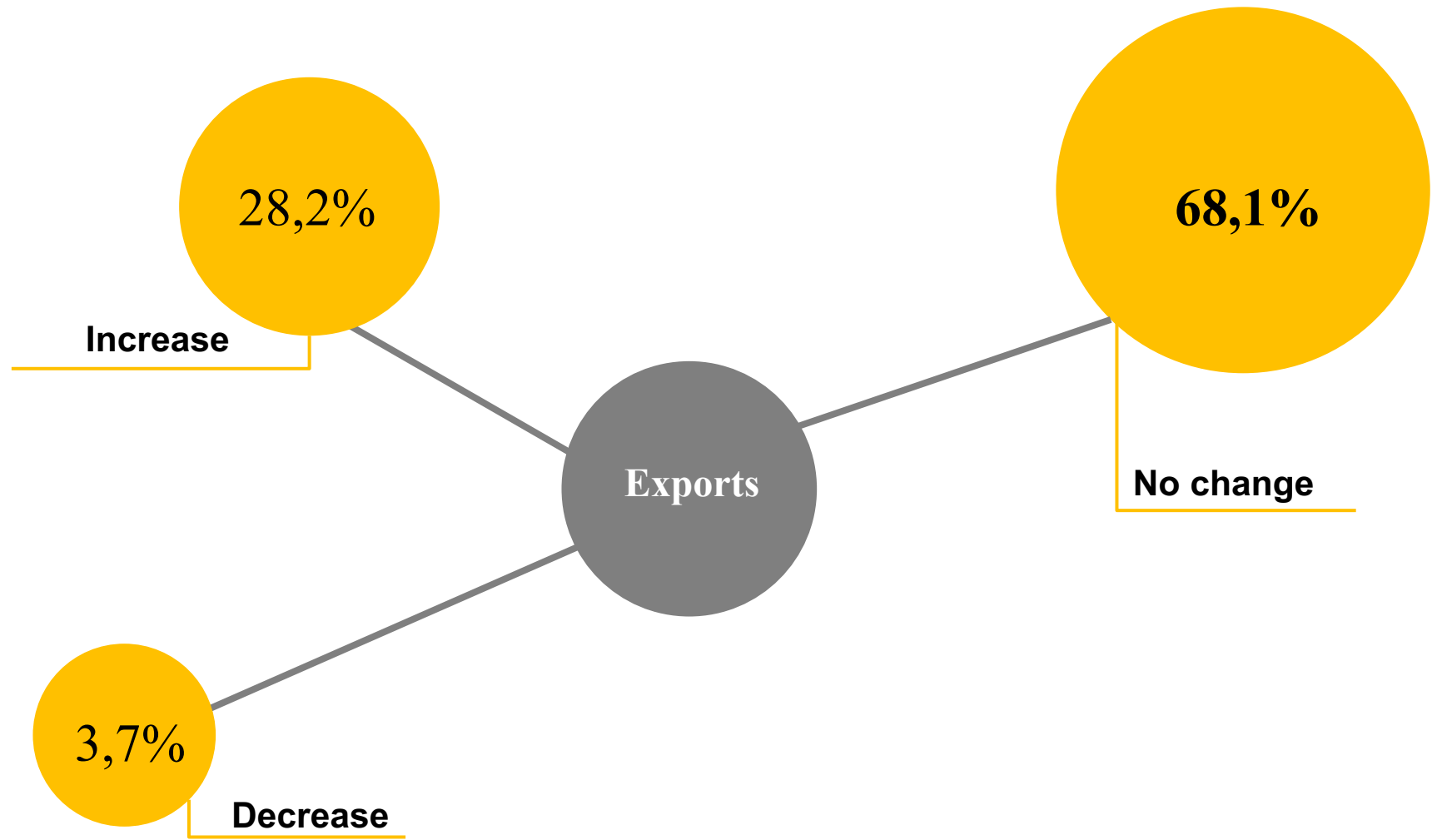
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2018

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

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2018



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

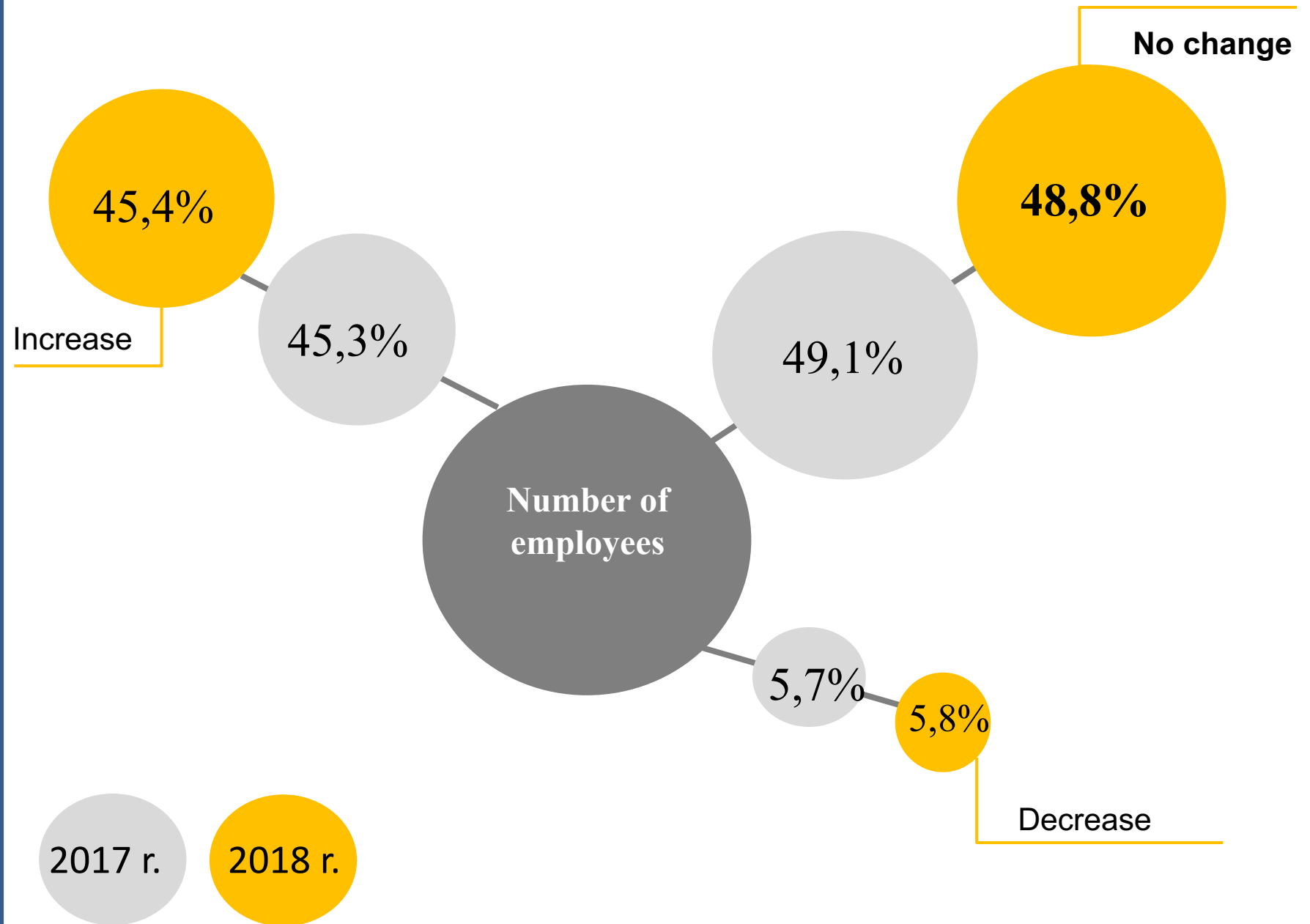


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# What are the prospects for your company's number of employees in 2018 compared to 2017?

Comparison to the previous edition of the survey

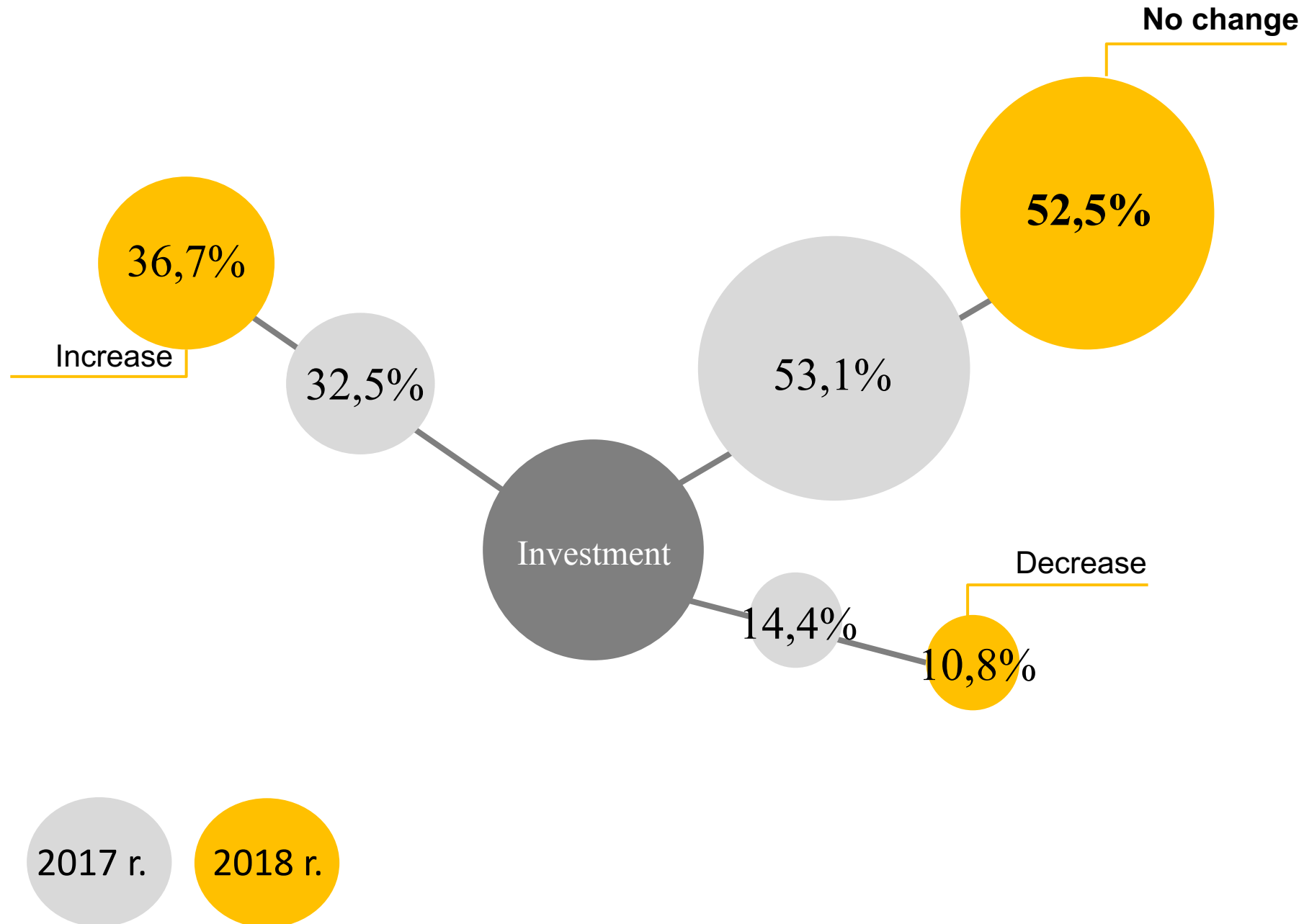
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What are the prospects for your company's expenditure on investment in 2018 compared to 2017?

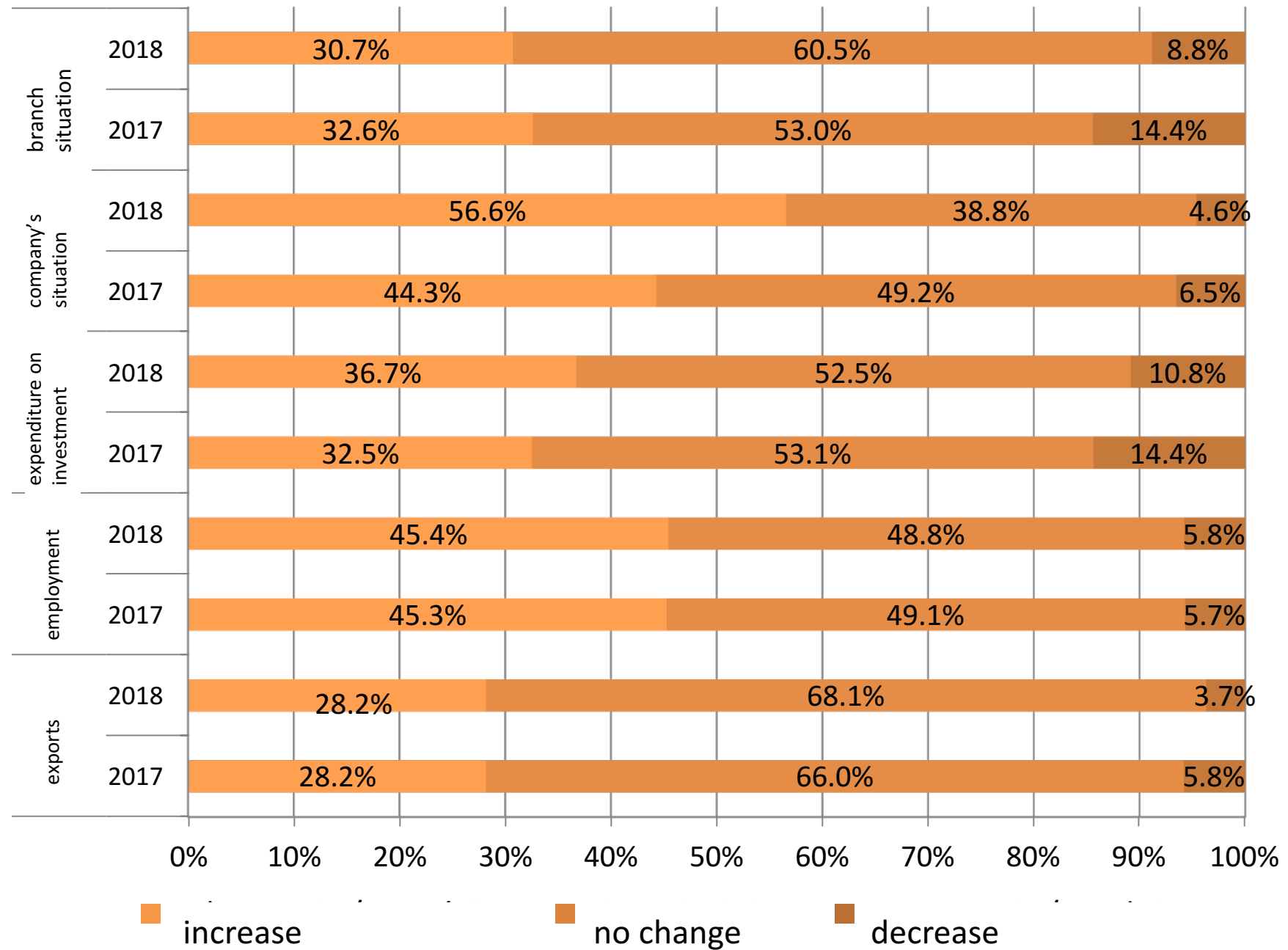
Comparison to the previous edition of the survey

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# Prospects for the companies in 2018 and 2017

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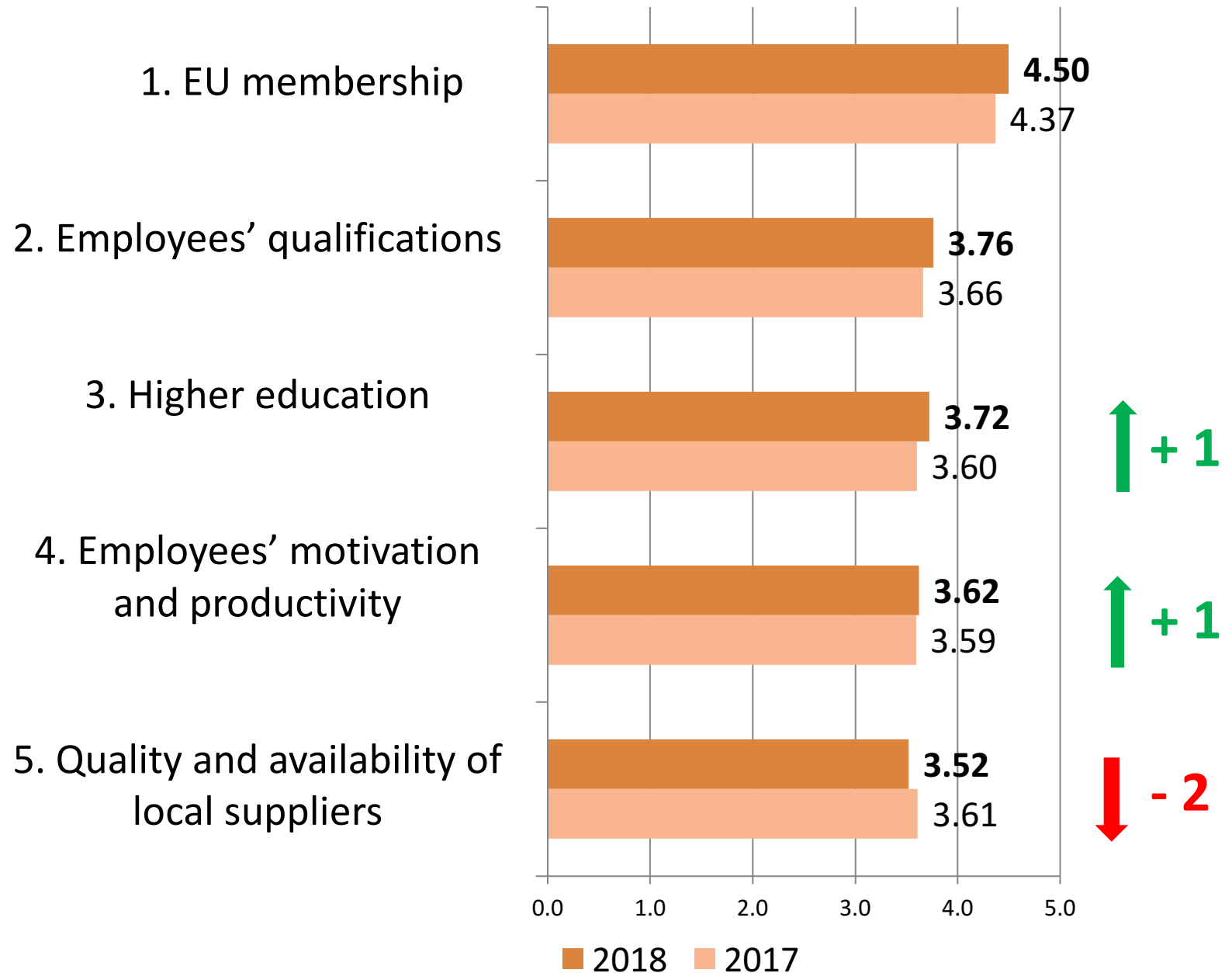


## Part III

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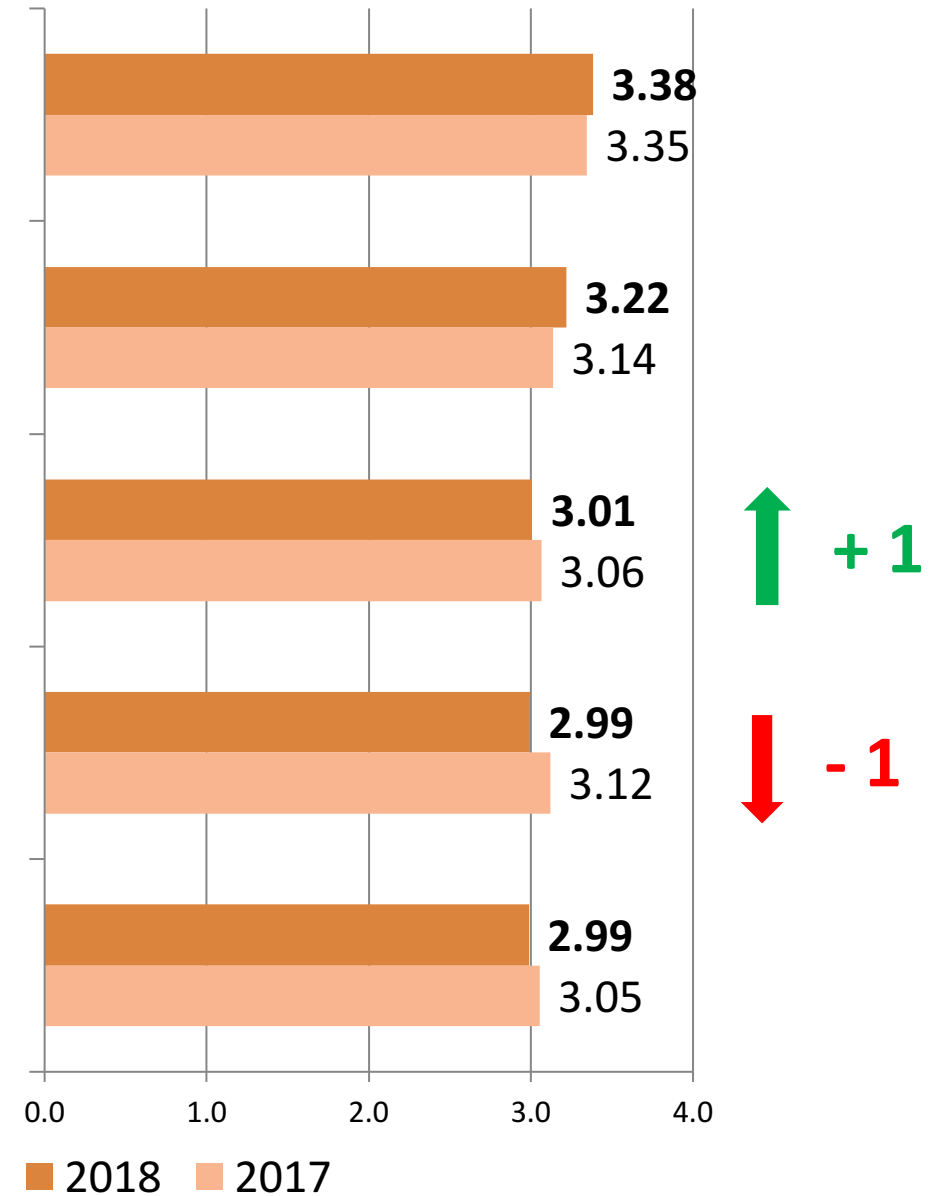
6. Infrastructure (transport, communication, IT, energy)

7. Payment morale

8. R&D environment

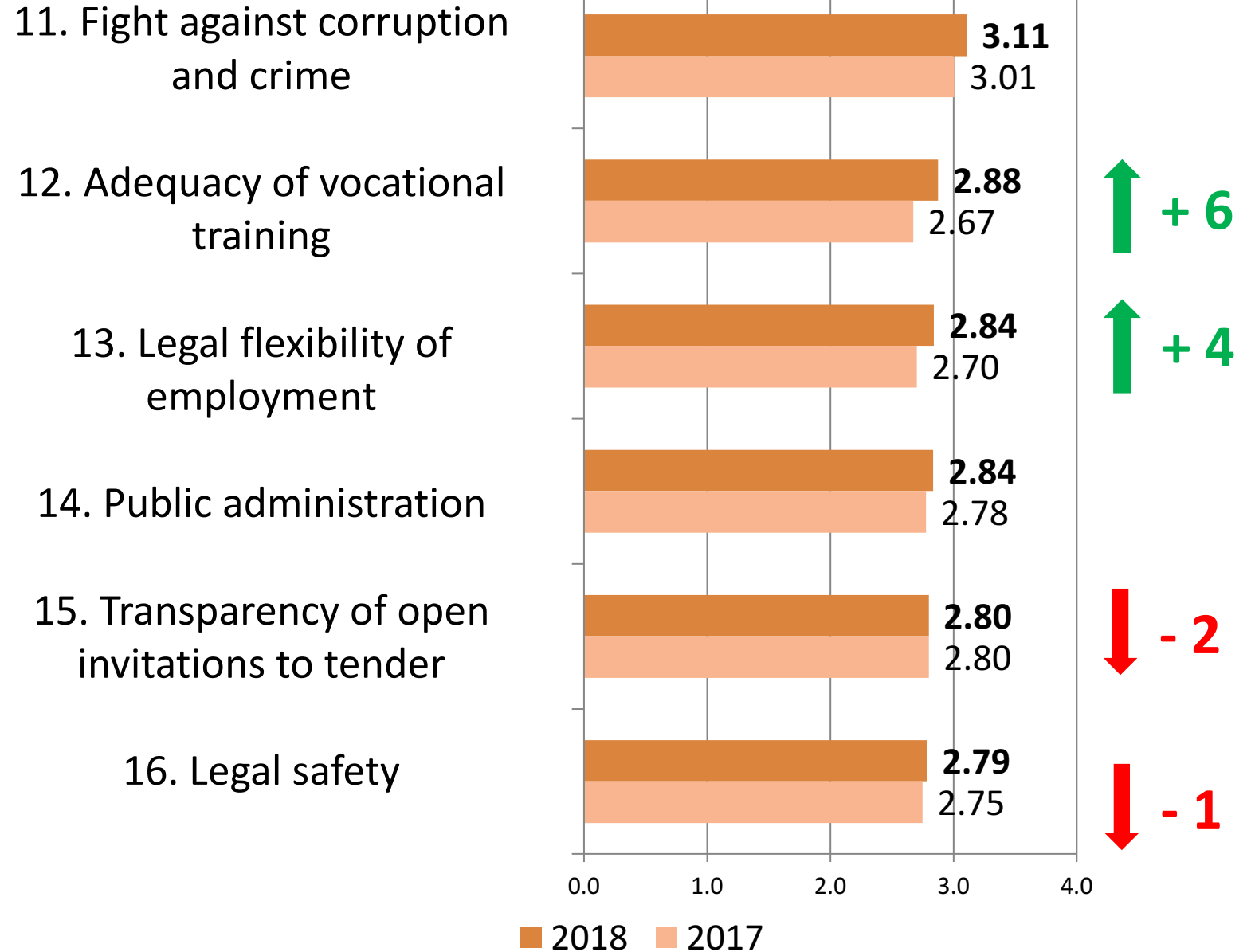
9. Labour costs

10. Access to state or EU funding



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

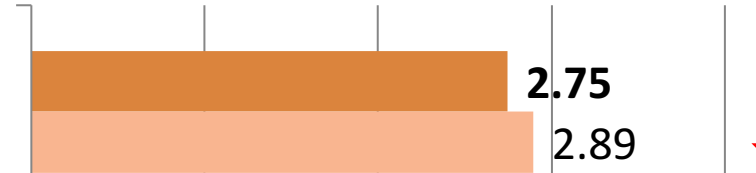
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Evaluation of investment factors (points and change of rank 2017/2018 1 – min; 5 – max)

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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)

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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

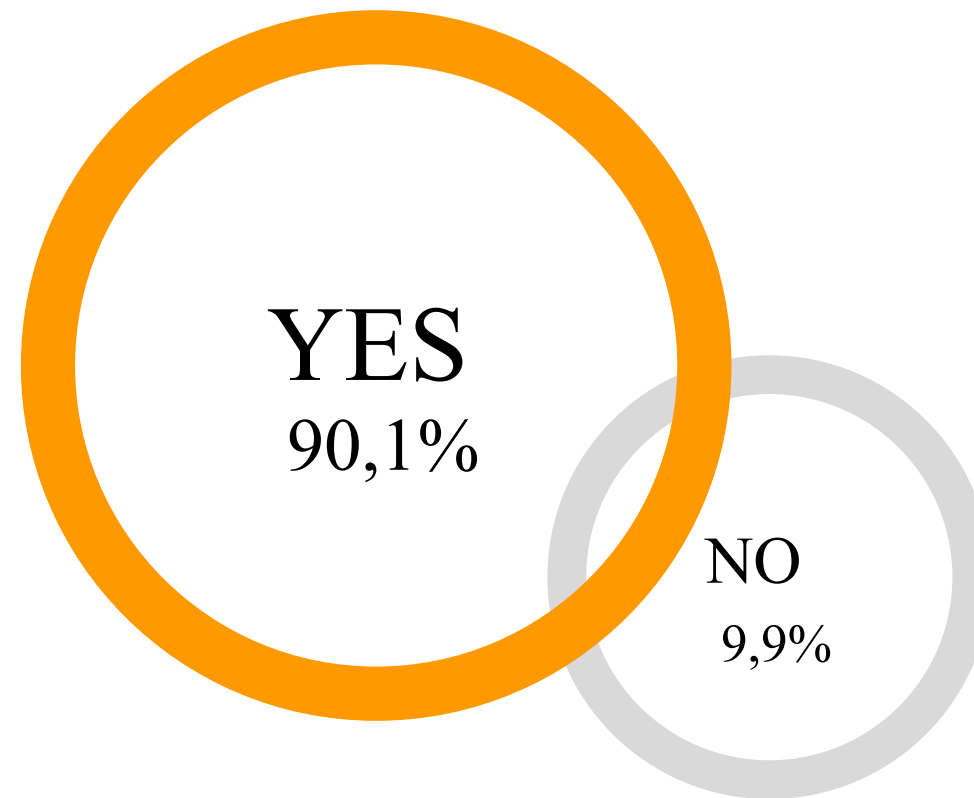


Part IV

Investment attractiveness

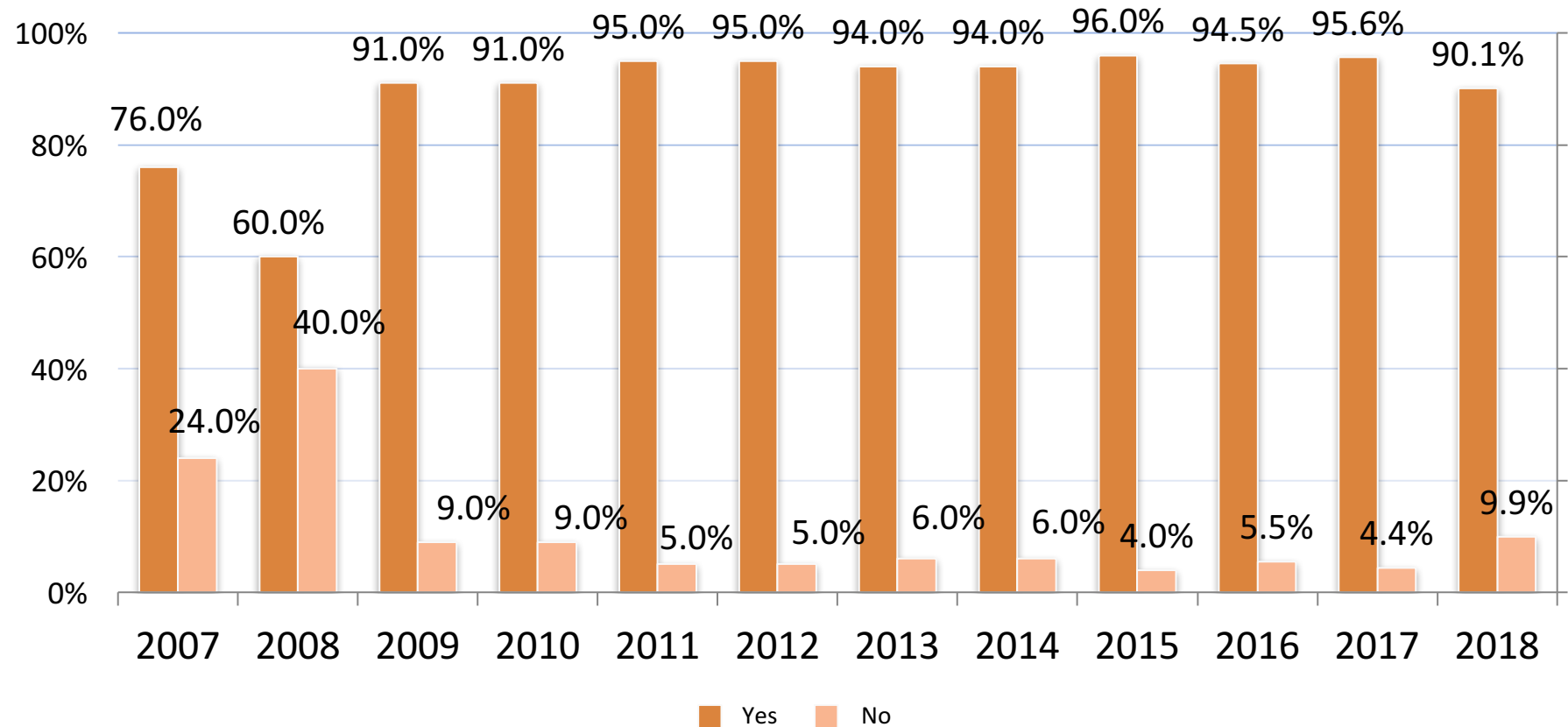
Would you invest  
in Poland again?

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# Would you invest in Poland again?

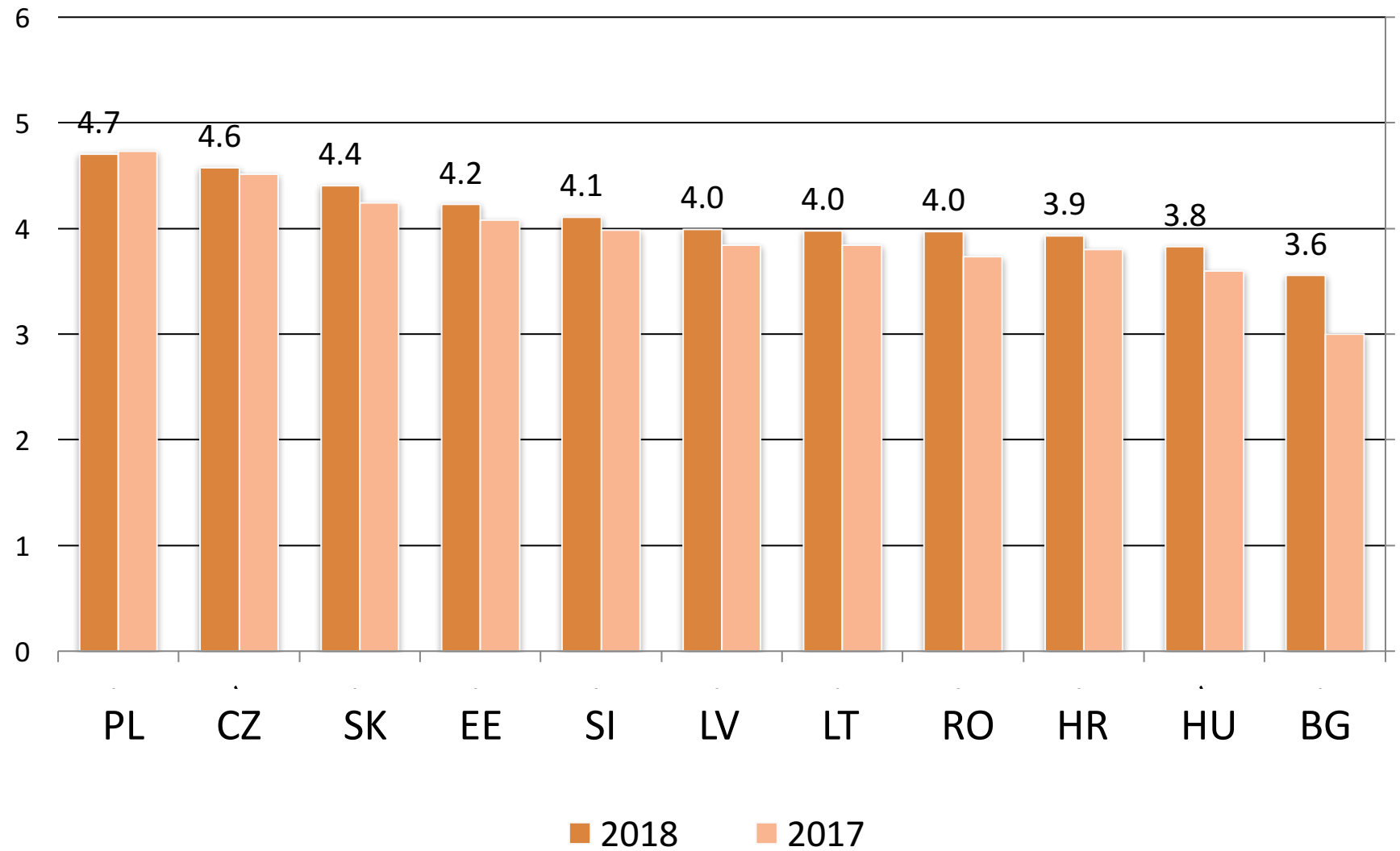
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2018



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

6 – very attractive  
1 – not attractive at all

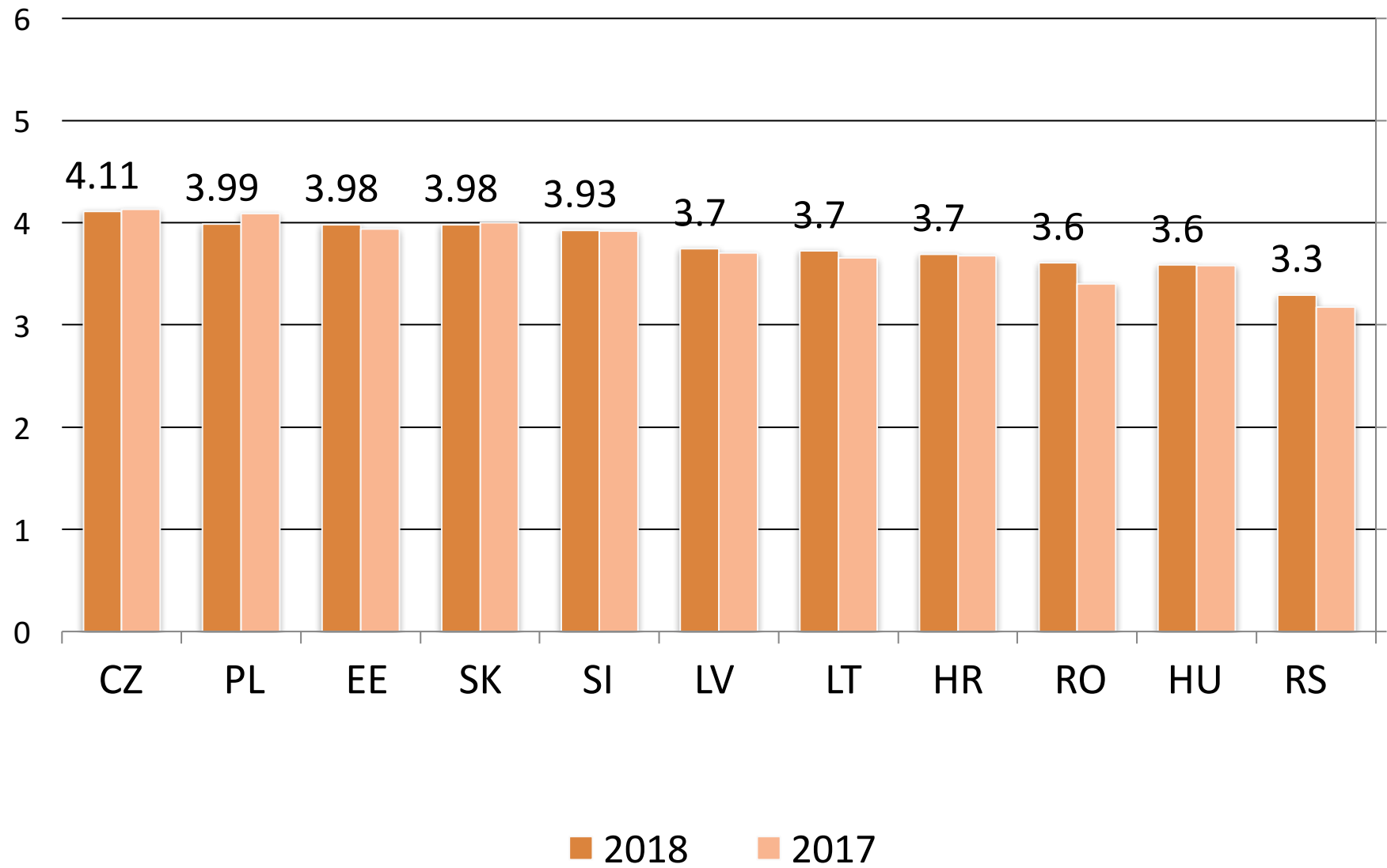
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Investment attractiveness of CEE countries in 2018 according to 1700 investors from the region

6 – very attractive  
1 – not attractive at all

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2018



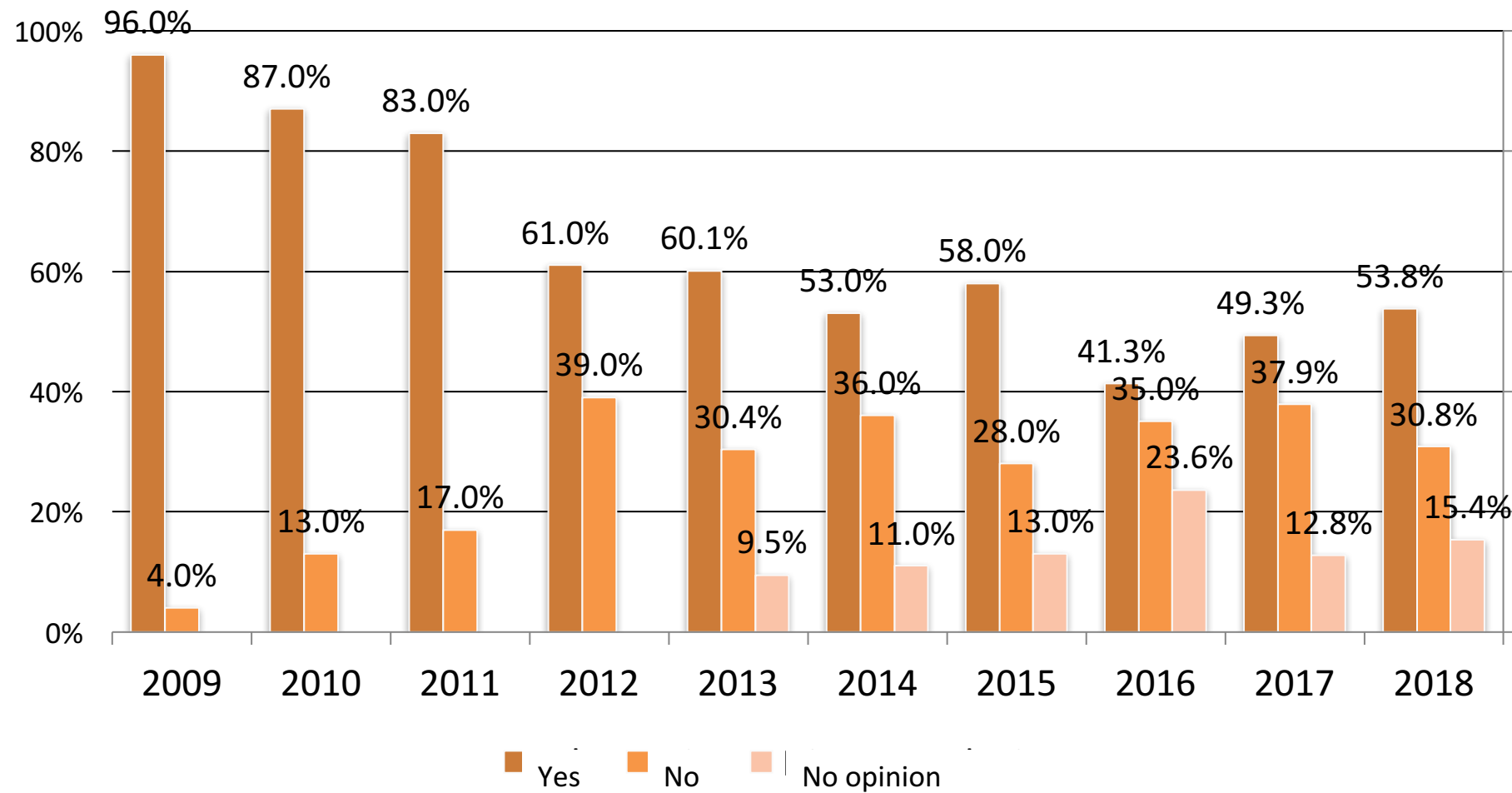
Investment attractiveness of CEE countries according to investors from the whole region

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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
<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?

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# Thank you for your attention!



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