



Economic Survey 2019

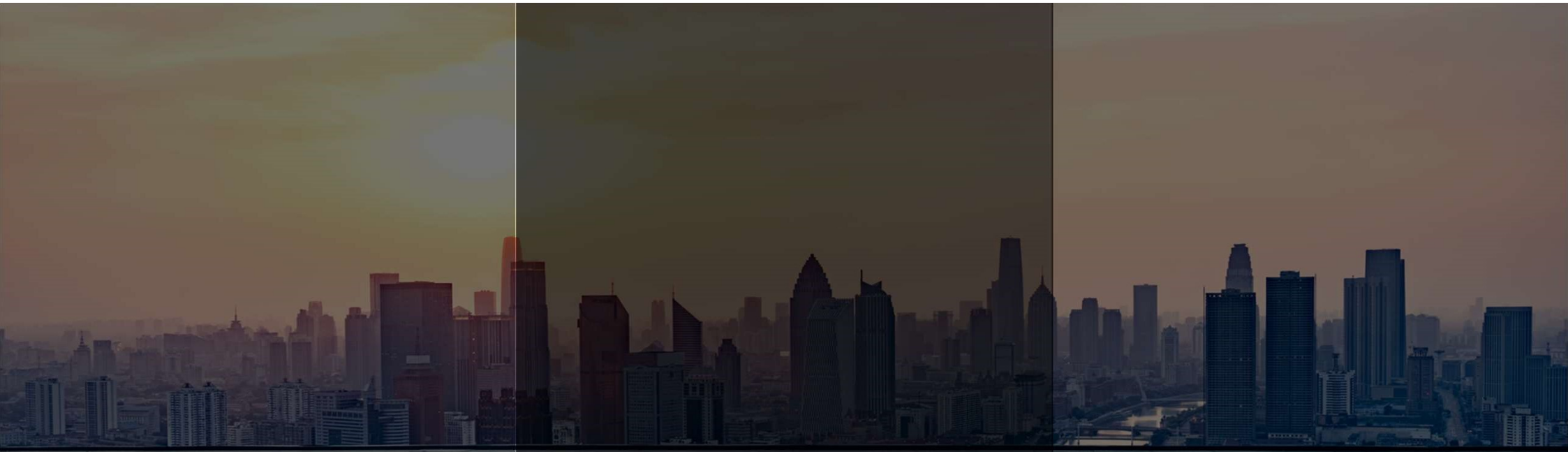
Poland in the eyes of foreign investors





International Group of Chambers of Commerce in Poland



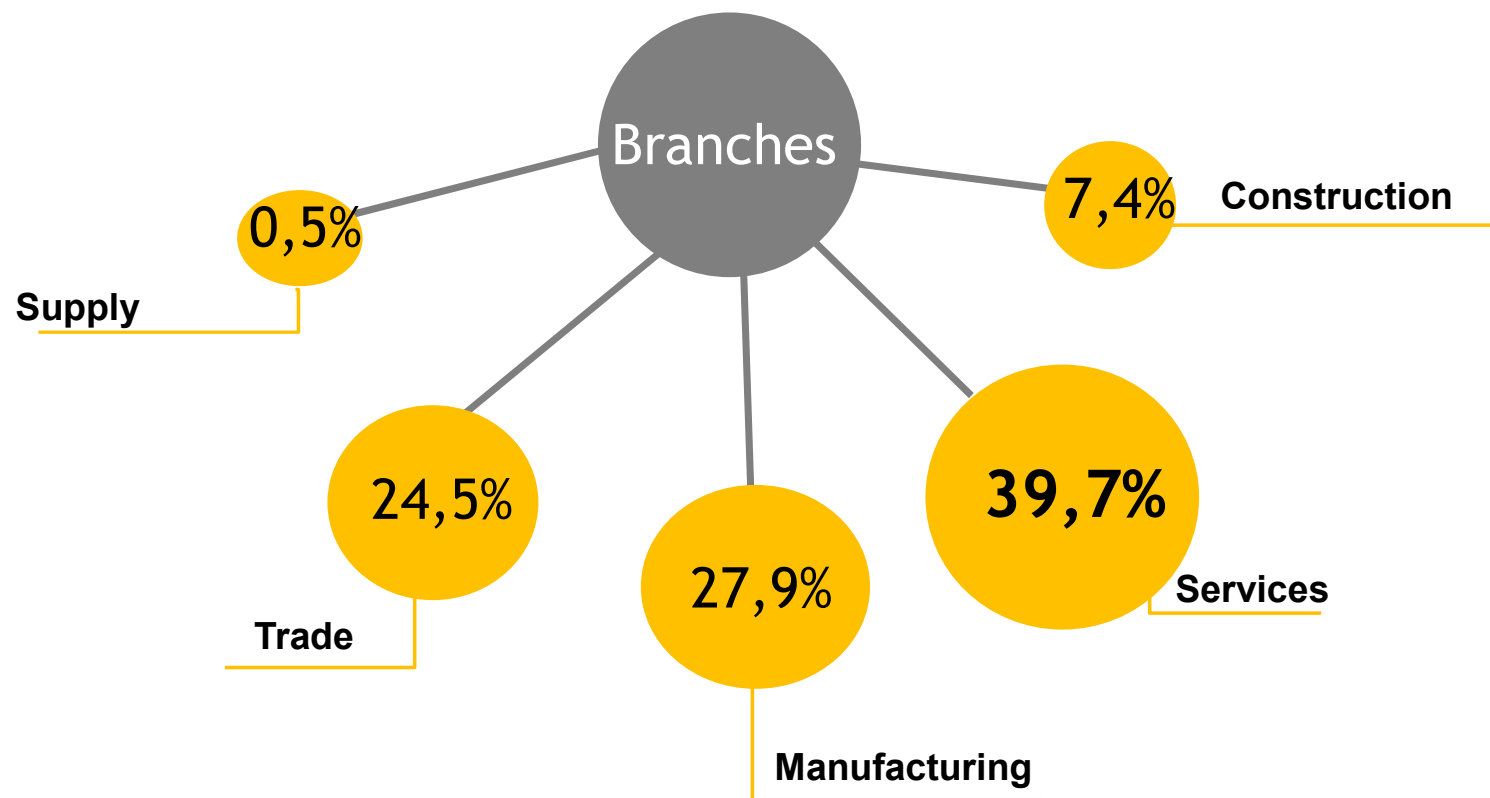


Part I

Characteristics of the surveyed companies

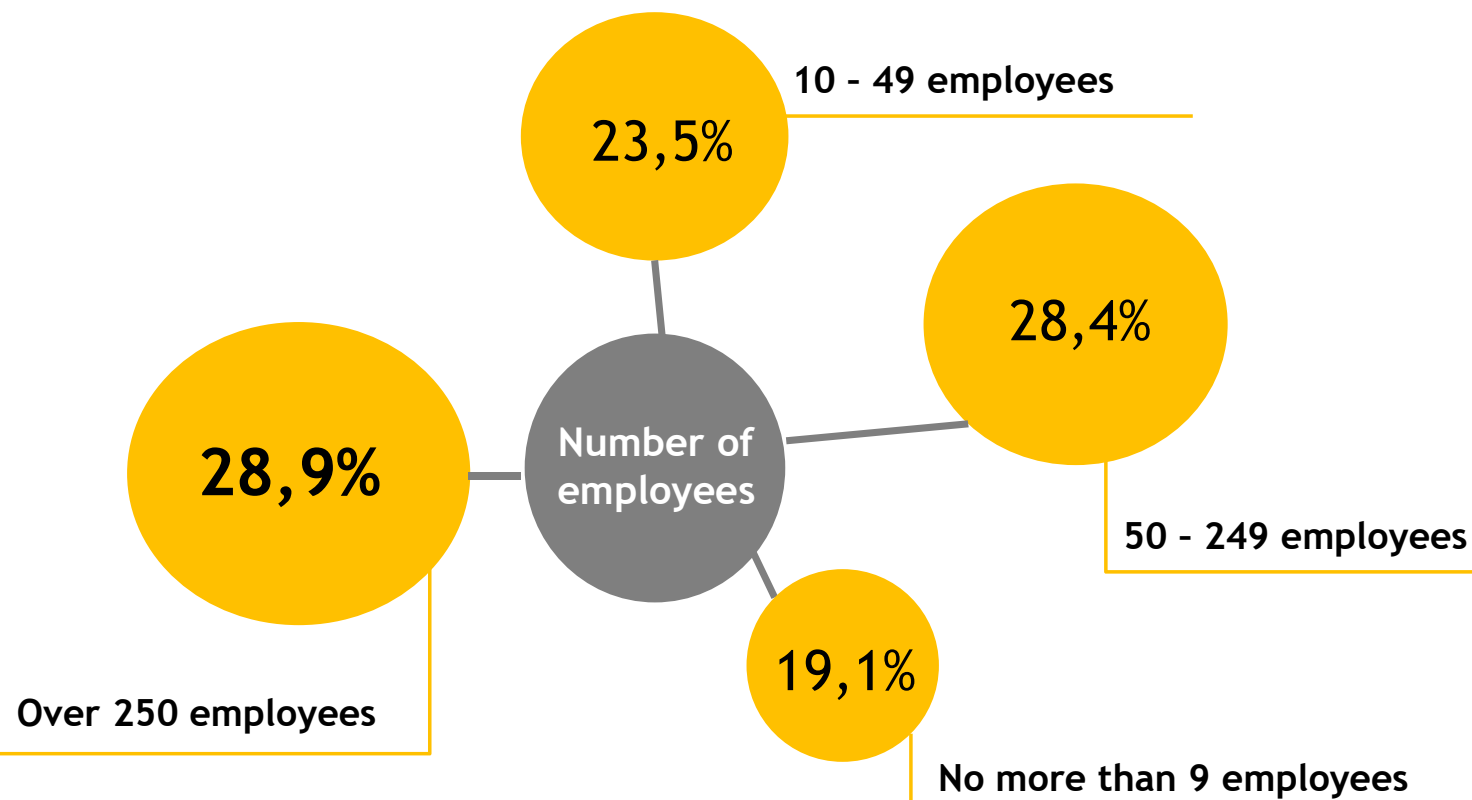
Structure of respondents - branches

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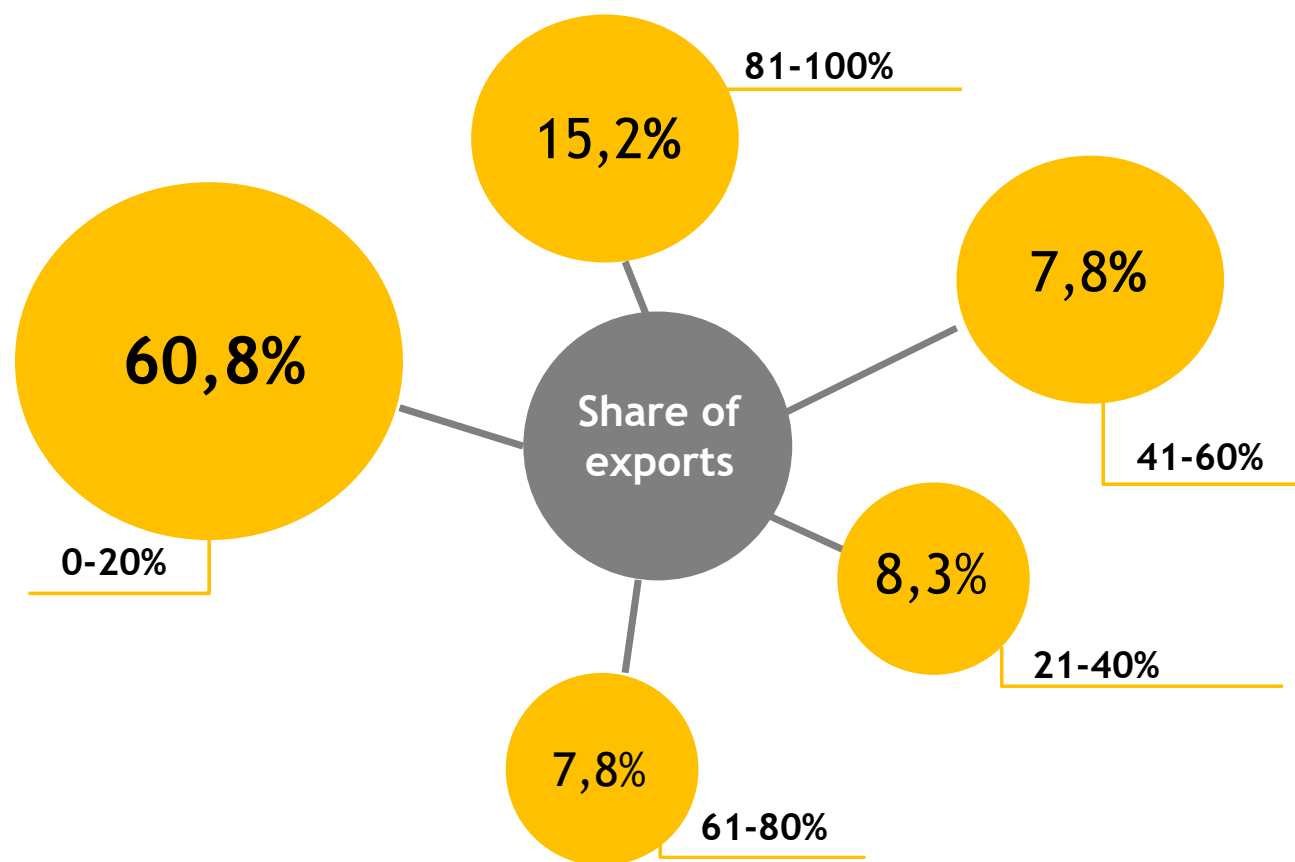


Structure of respondents - number of employees

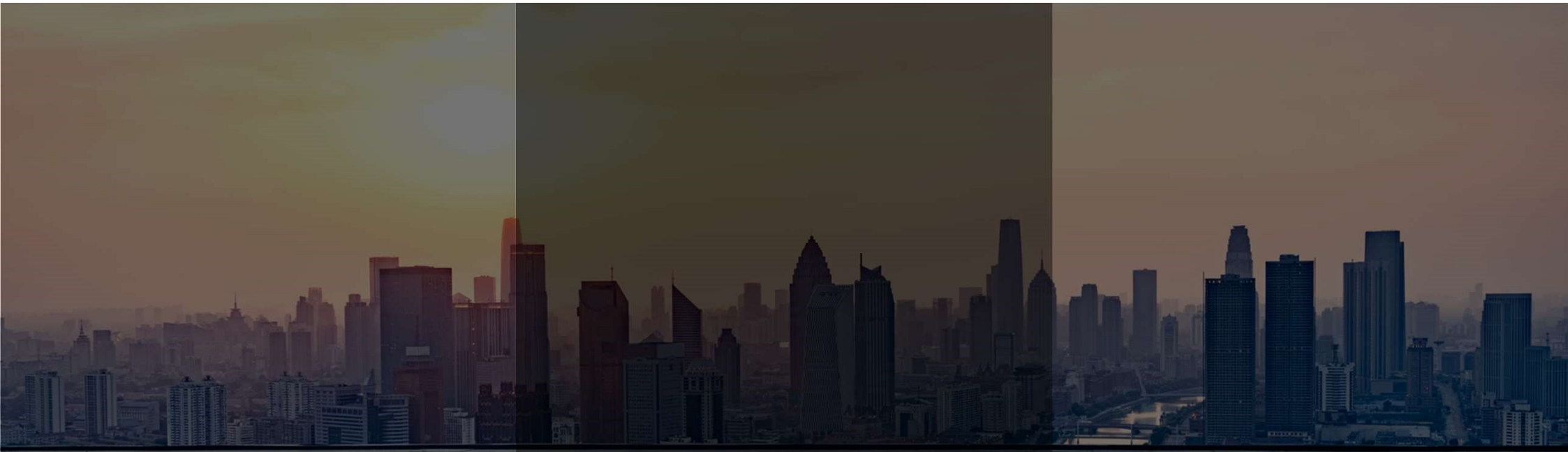
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Structure of respondents - share of exports in total turnover



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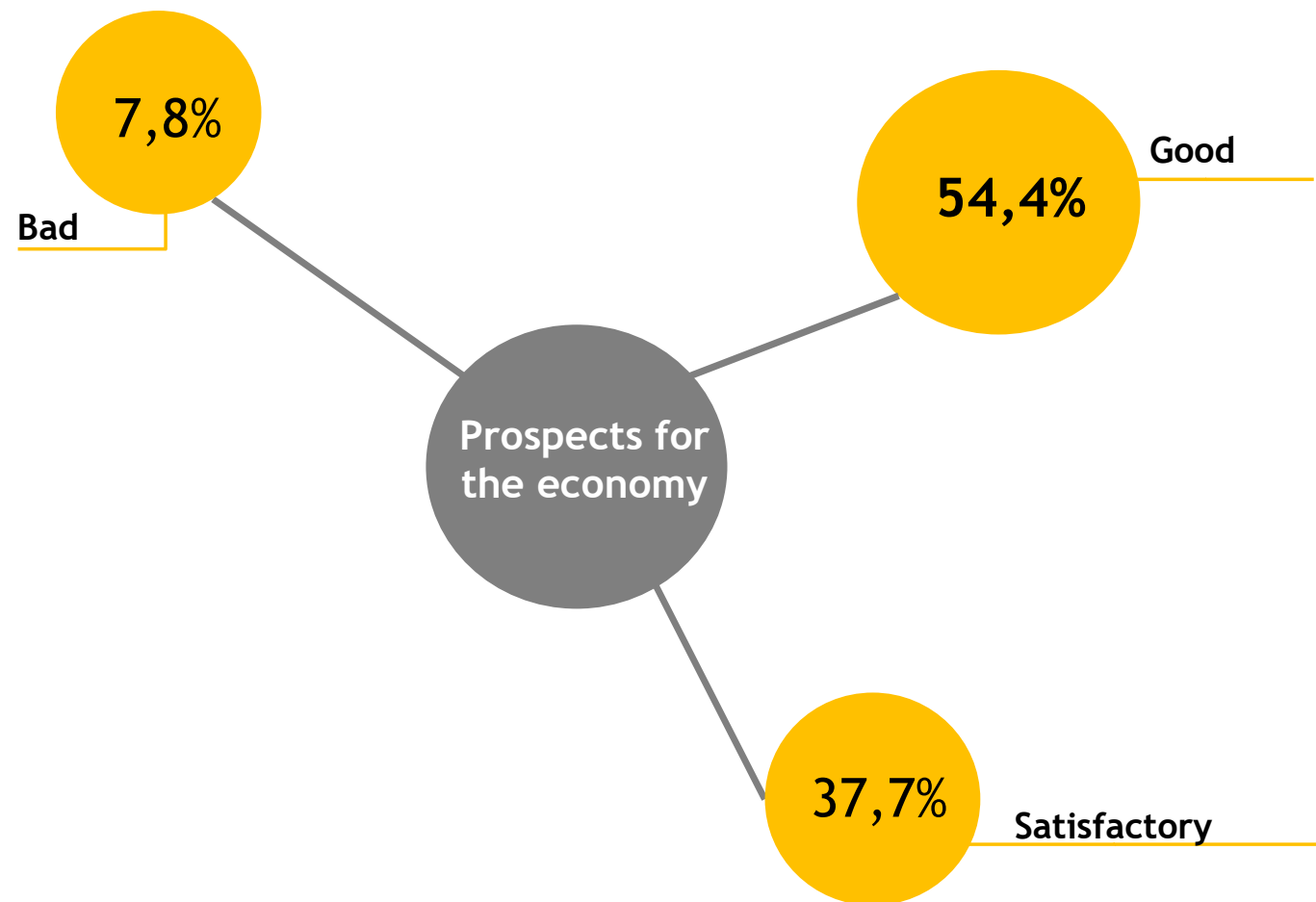


Part II

Economic situation in Poland

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

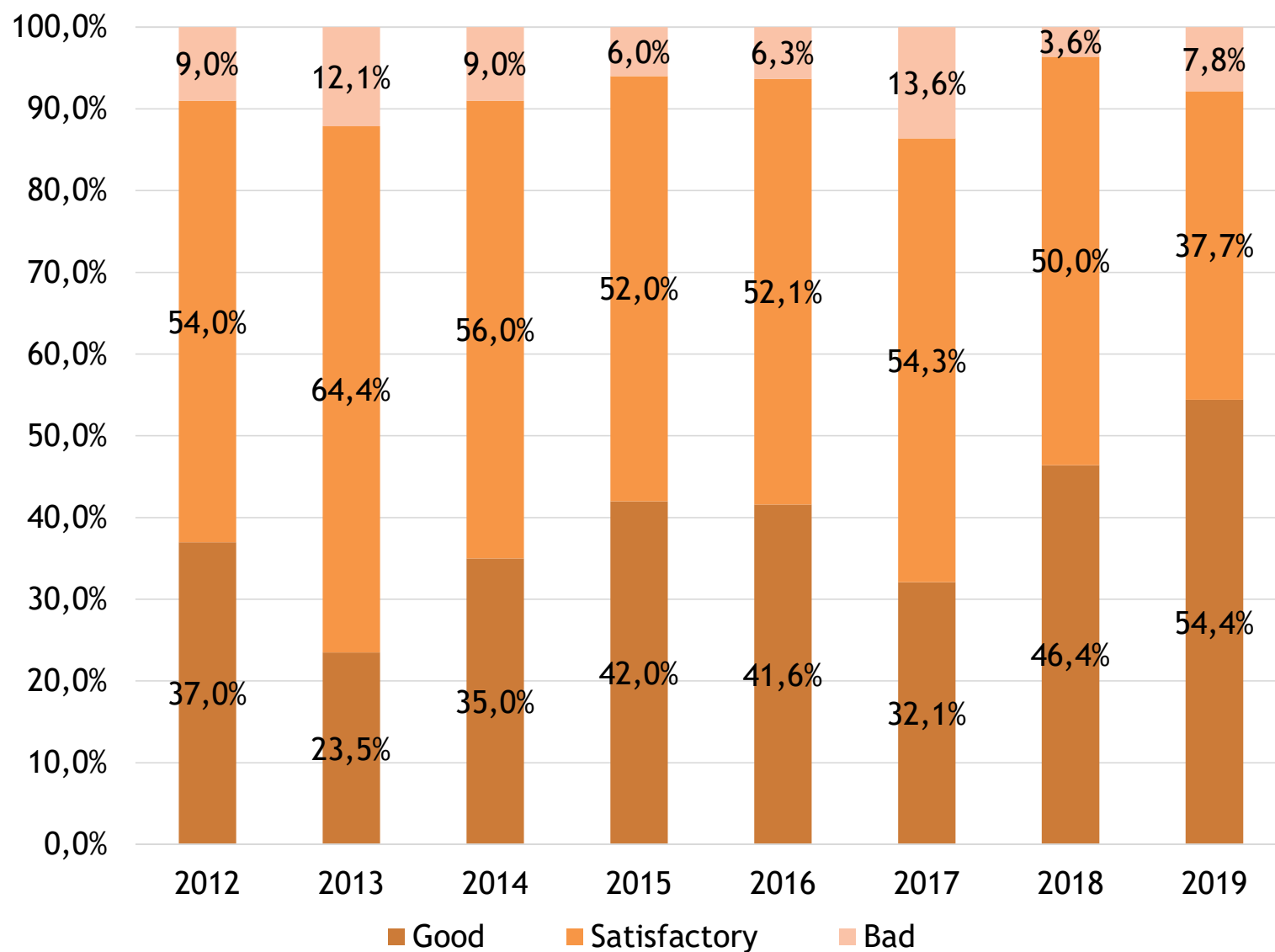
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How do you evaluate the current state of the Polish economy?

Comparison to the previous editions of the survey

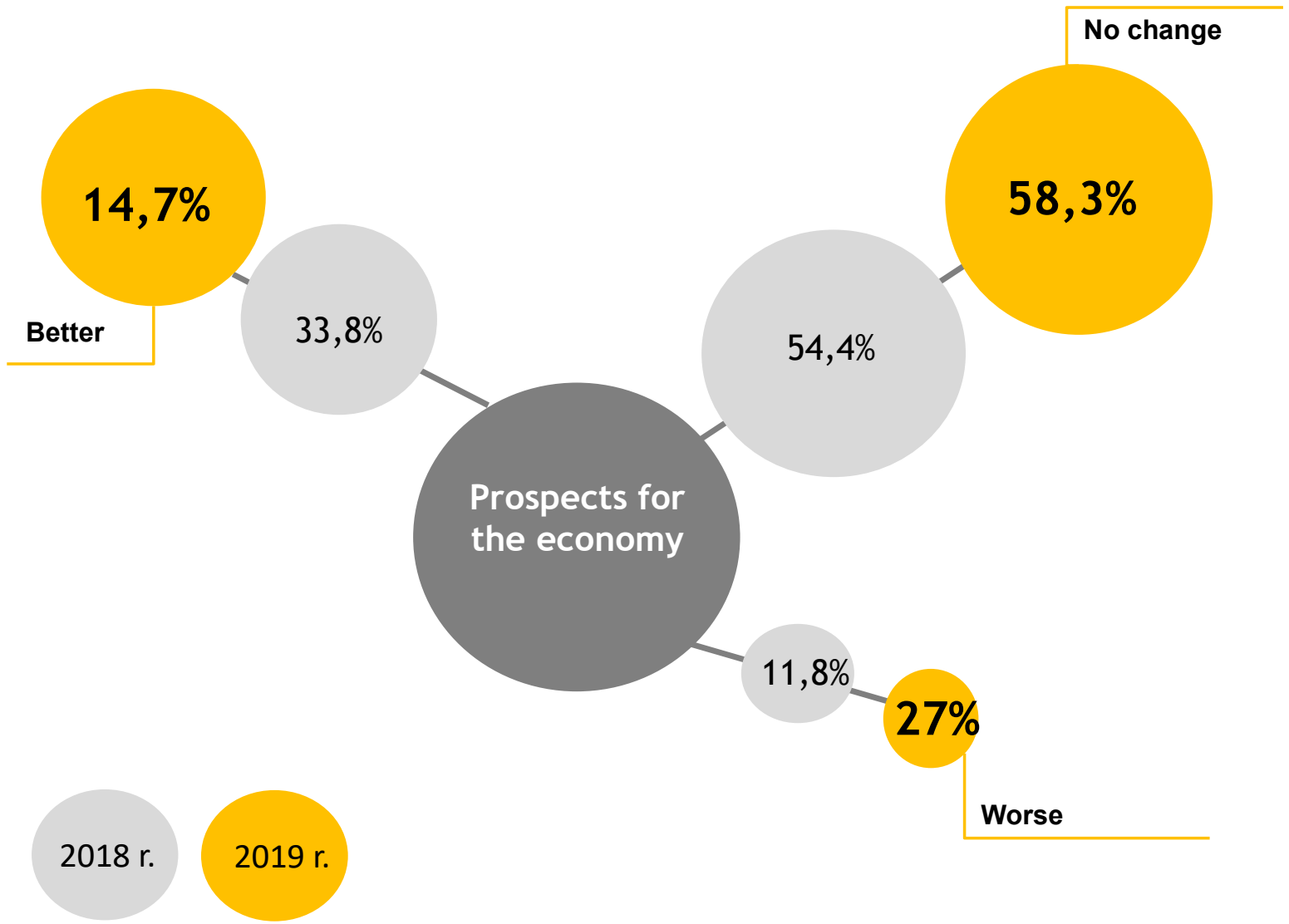
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What are the prospects for the Polish economy in 2019 compared to 2018?

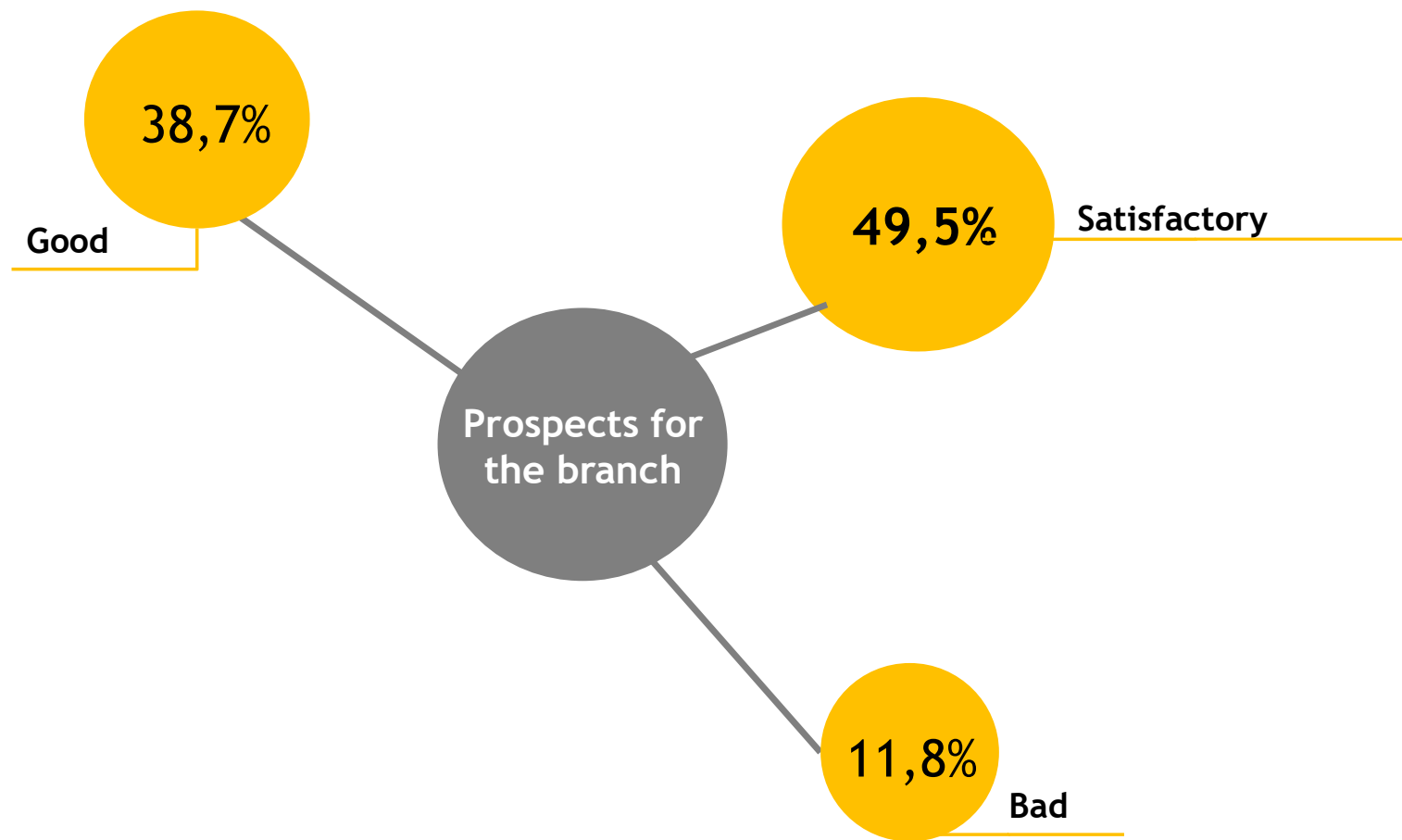
Comparison to the previous edition of the survey

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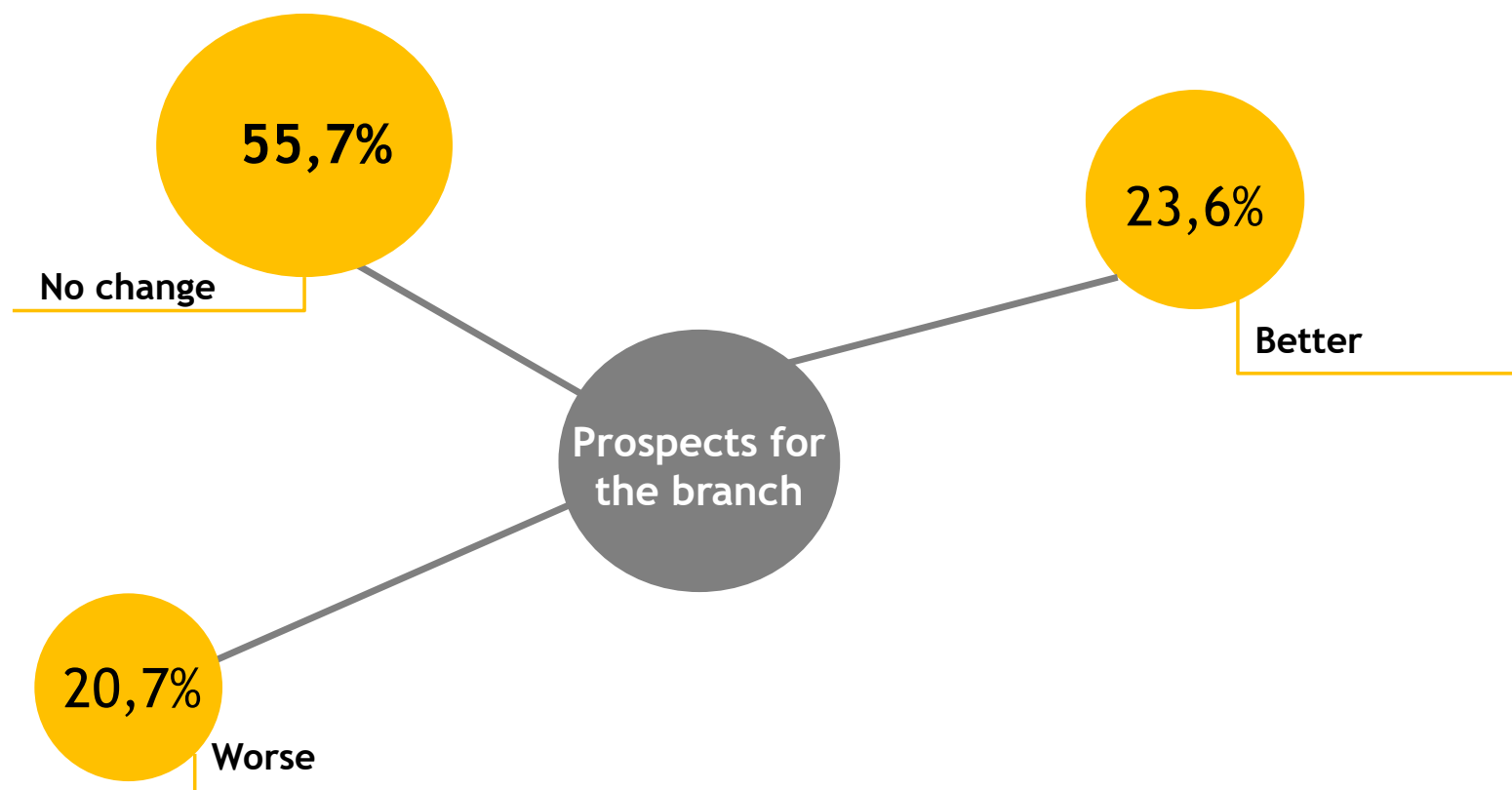
How do you evaluate the
current economic
situation of your branch?

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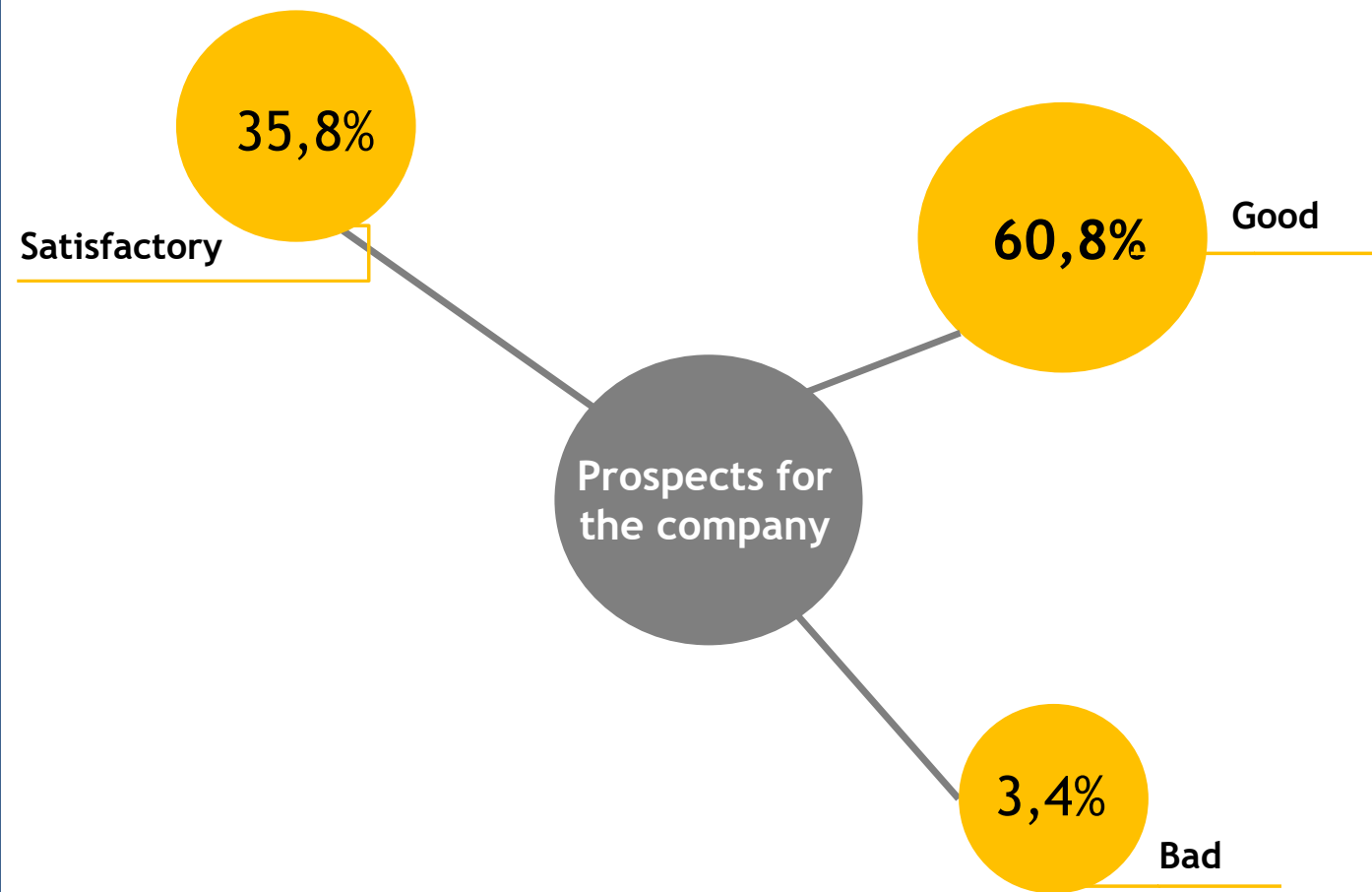
What are the prospects for your branch in 2019 compared to 2018?

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

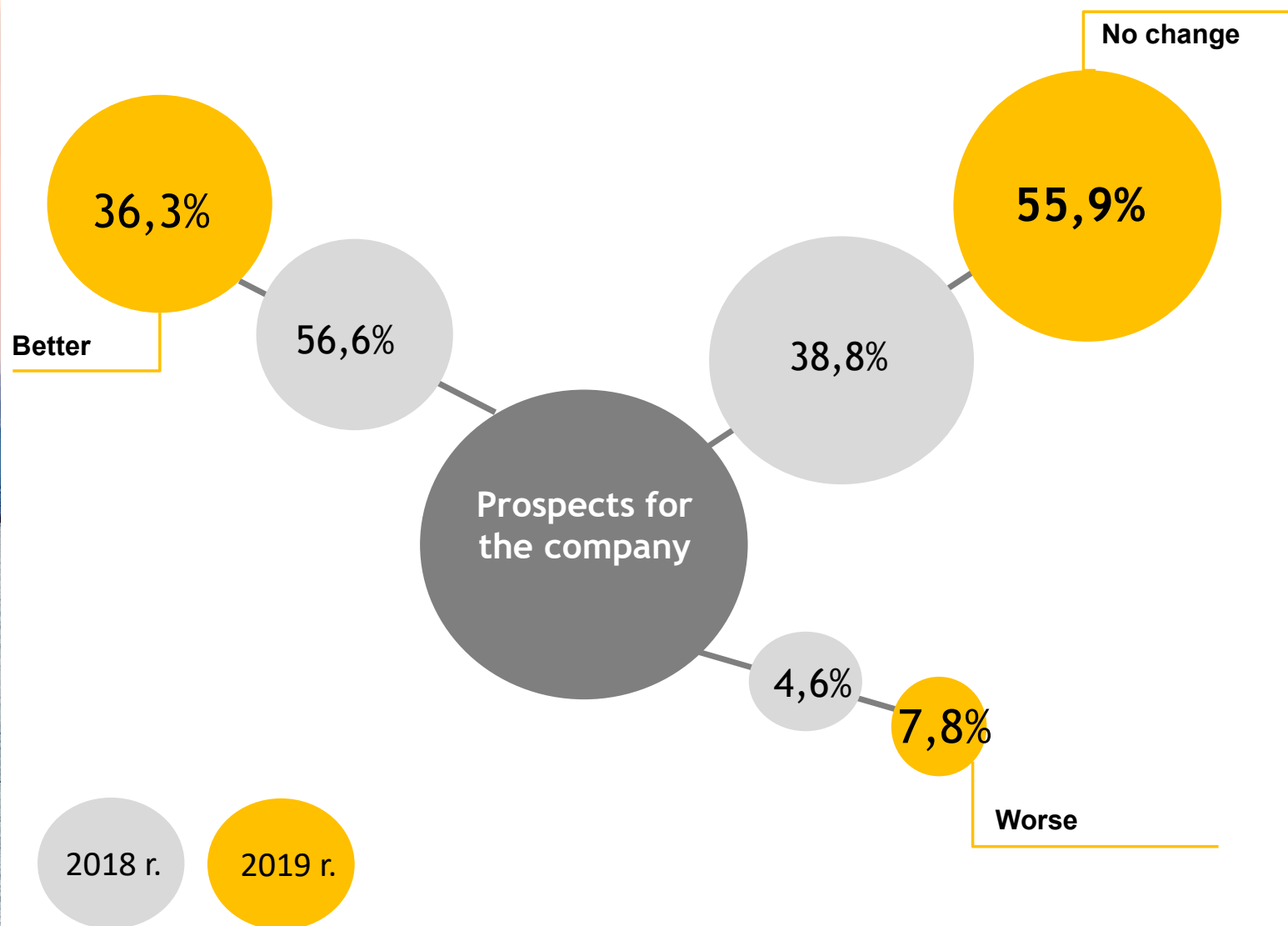
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What are the prospects for
your company in 2019
compared to 2018?

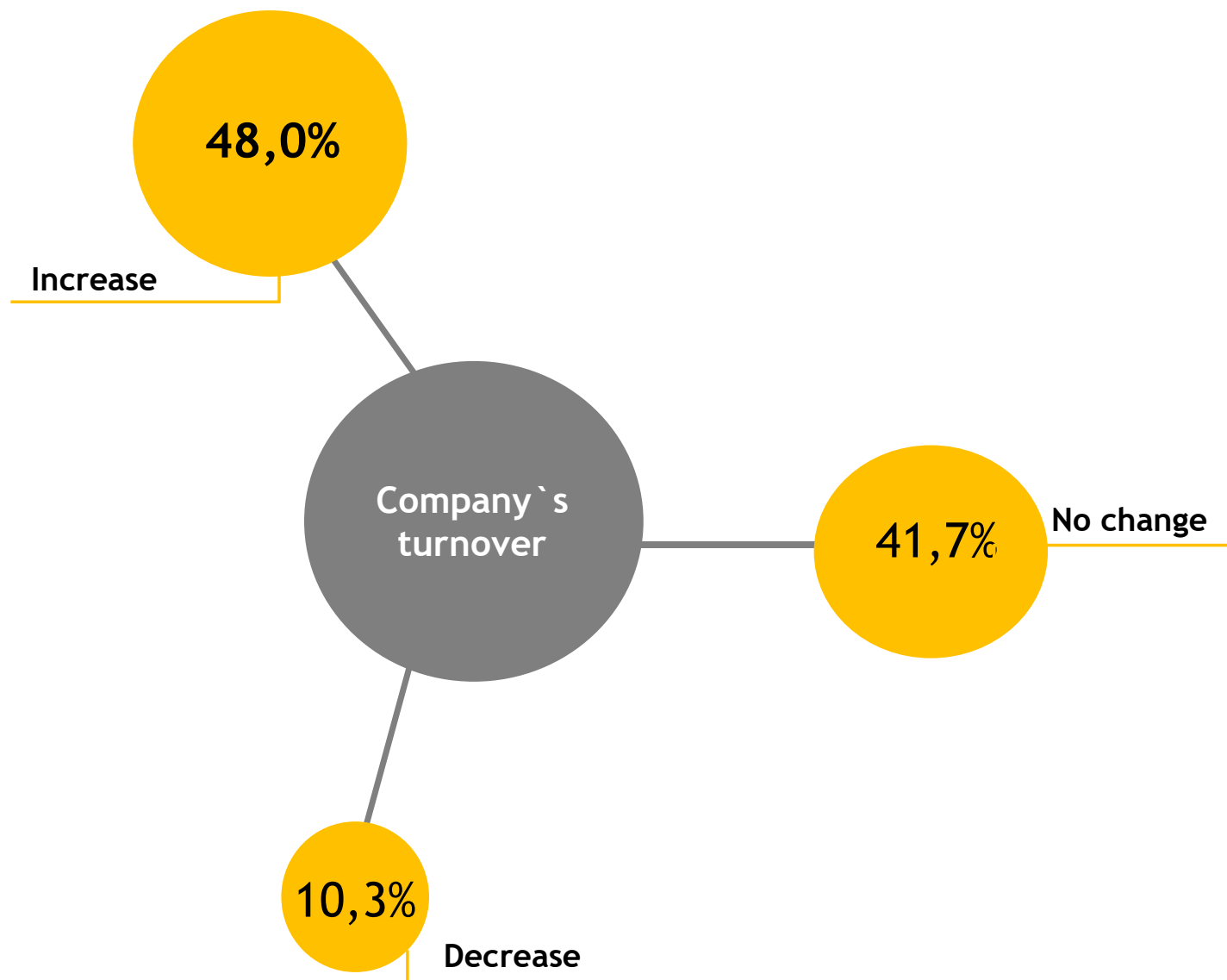
Comparison to the previous
edition of the survey

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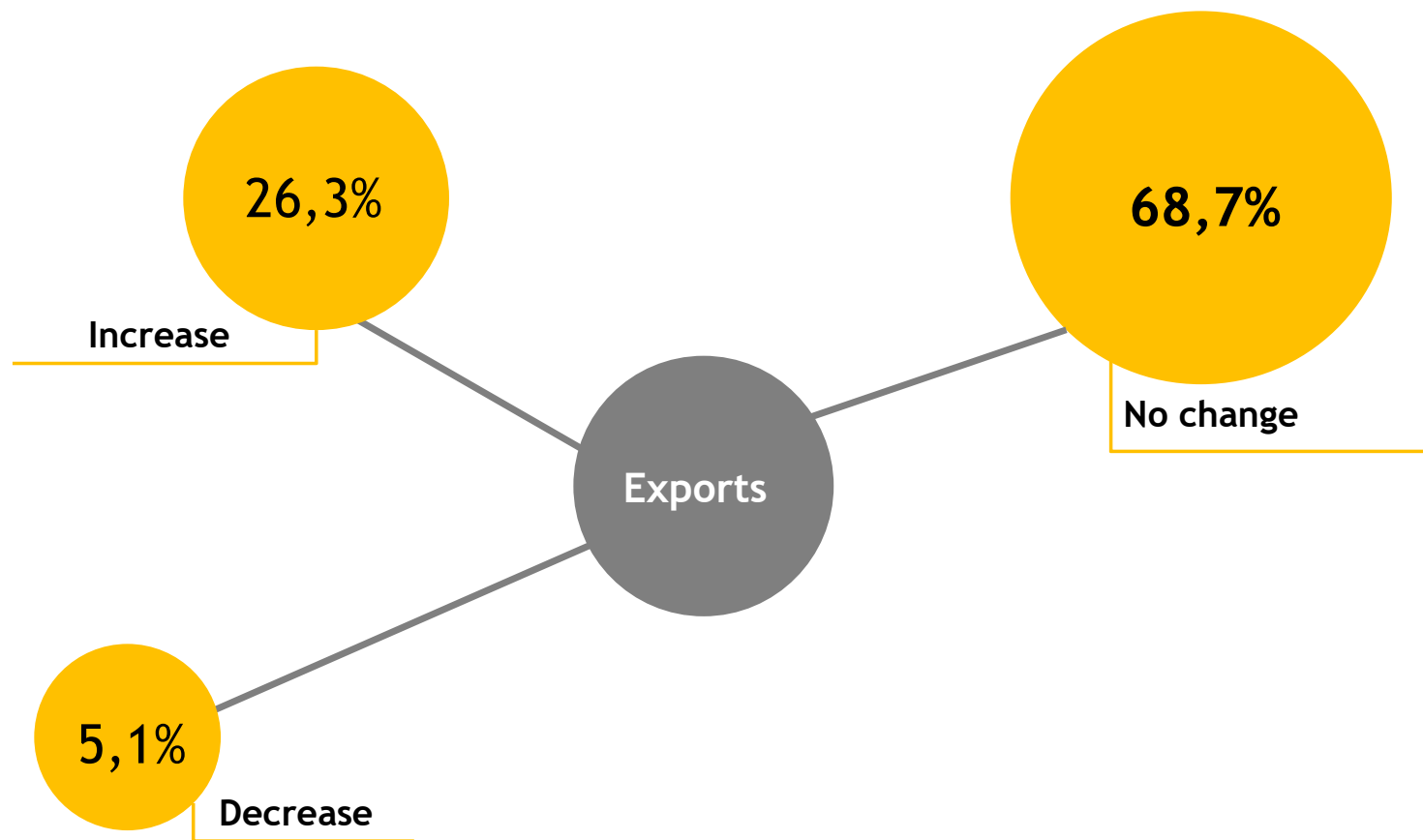
What are the prospects
for your
company's turnover in
2019 compared to 2018?

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What are the prospects for
your company`s exports in
2019 compared to 2018?

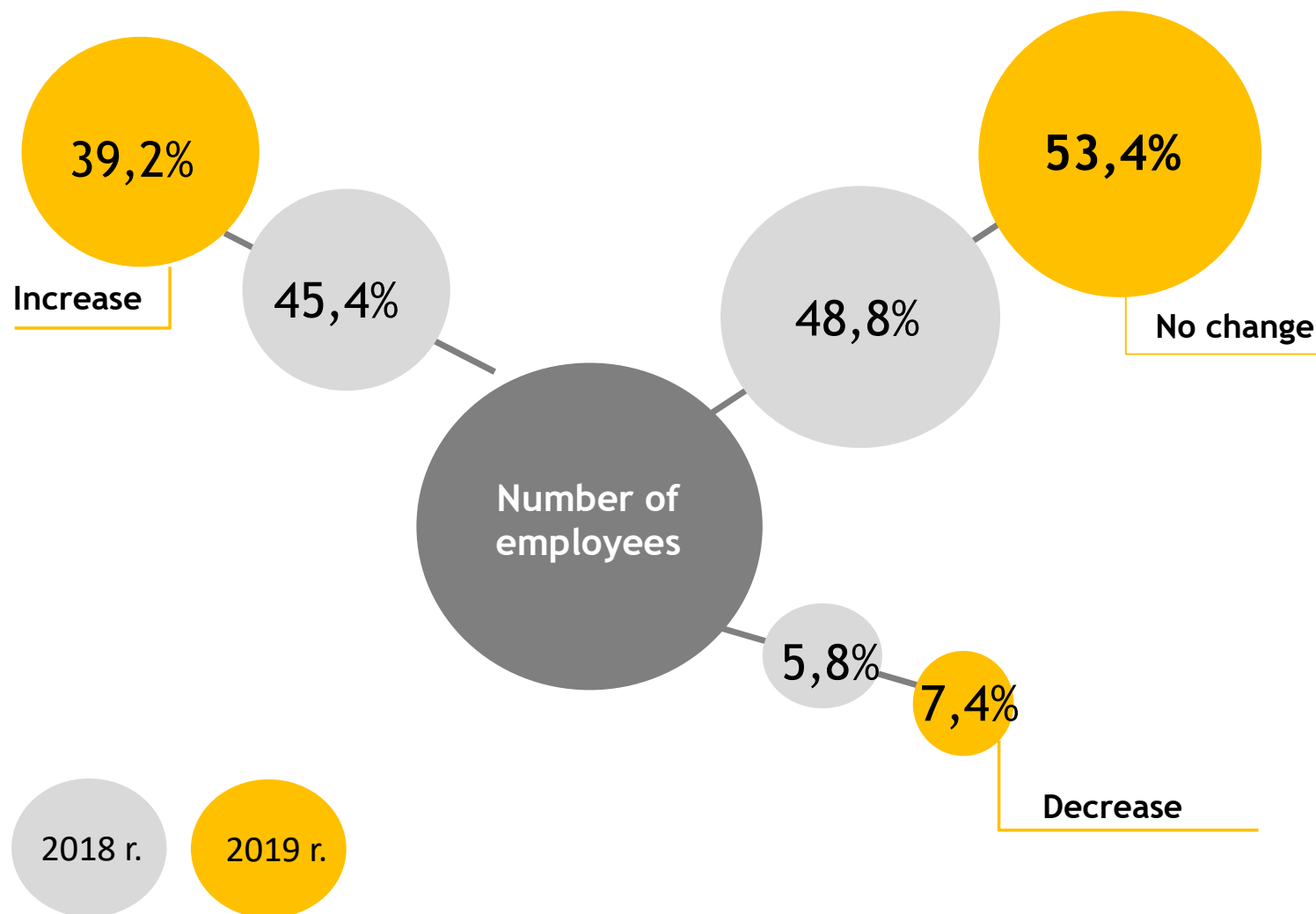
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What are the prospects for your company's number of employees in 2019 compared to 2018?

Comparison to the previous edition of the survey

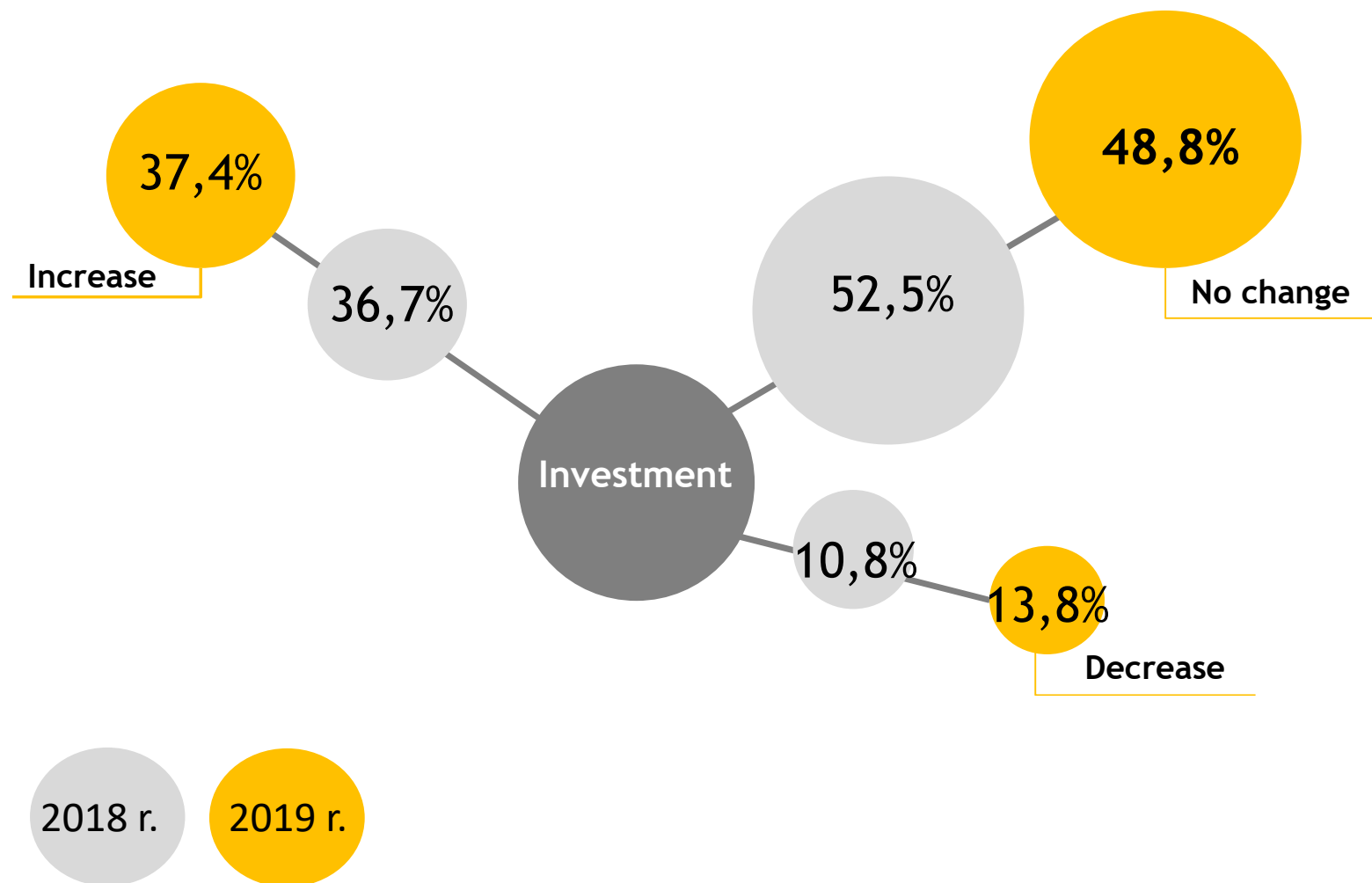
Economic Survey 2019

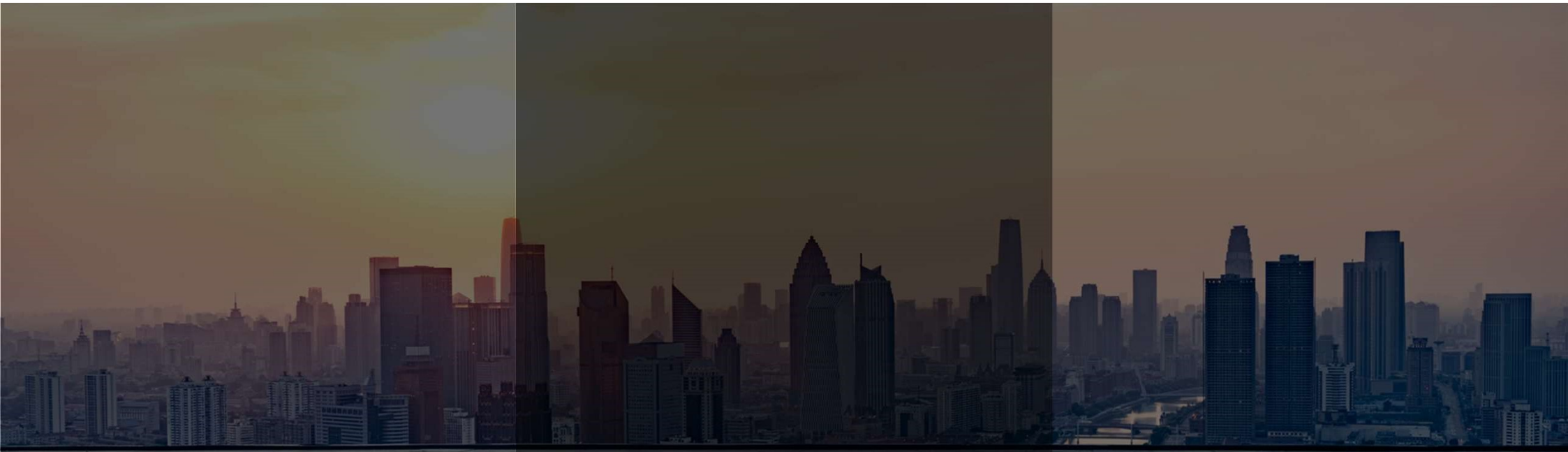


What are the prospects
for your company`s
expenditure on
investment in 2019
compared to 2018?

Comparison to the previous
edition of the survey

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Part III

Investment factors

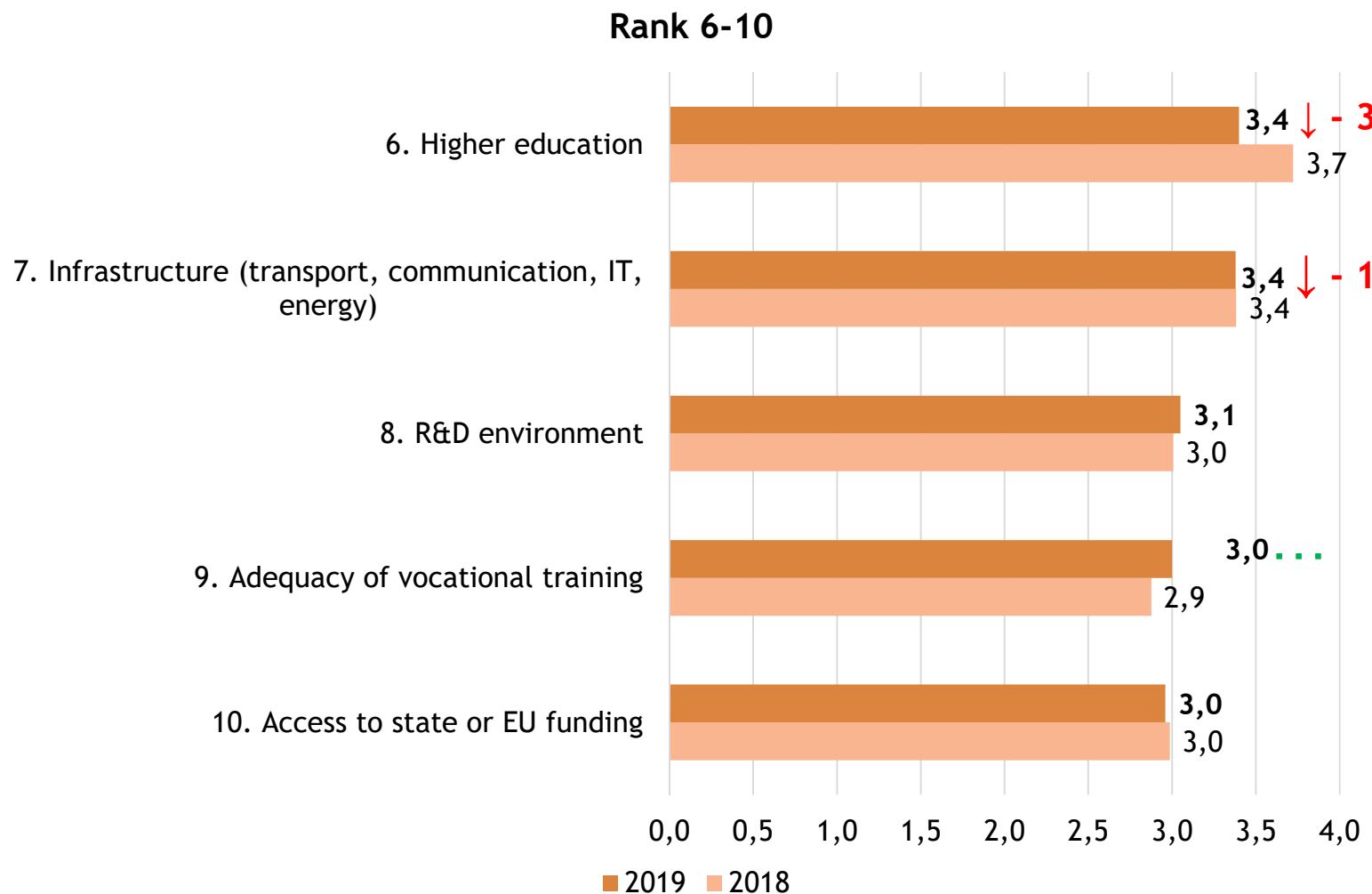
Evaluation of investment factors (points of rank 2018/2019, 1 - min; 5 - max)

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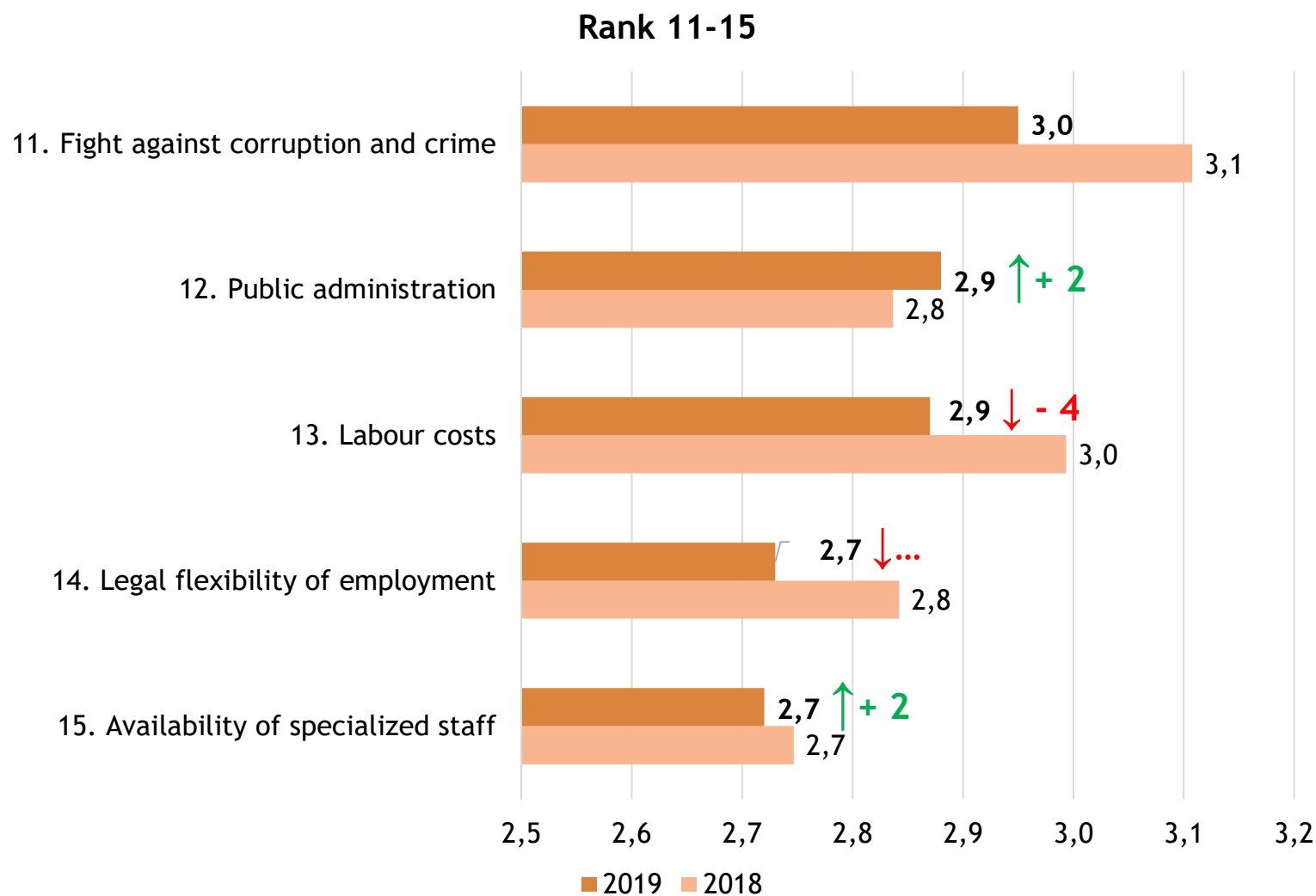
Evaluation of investment factors (points of rank 2018/2019, 1 - min; 5 - max)

Economic Survey 2019



Evaluation of investment factors (points of rank 2018/2019, 1 - min; 5 - max)

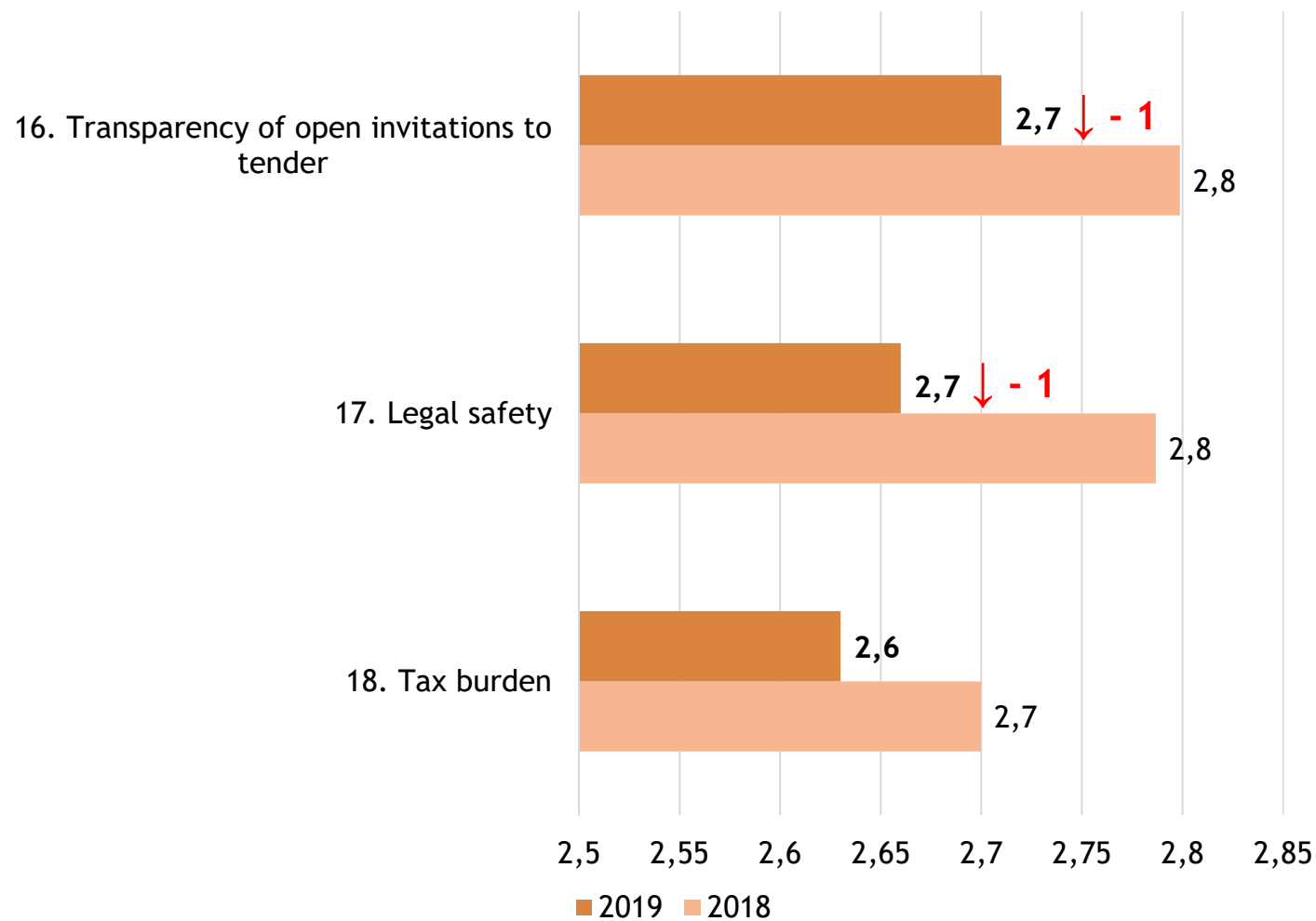
Economic Survey 2019



Evaluation of investment factors (points of rank 2018/2019, 1 - min; 5 - max)

Economic Survey 2019

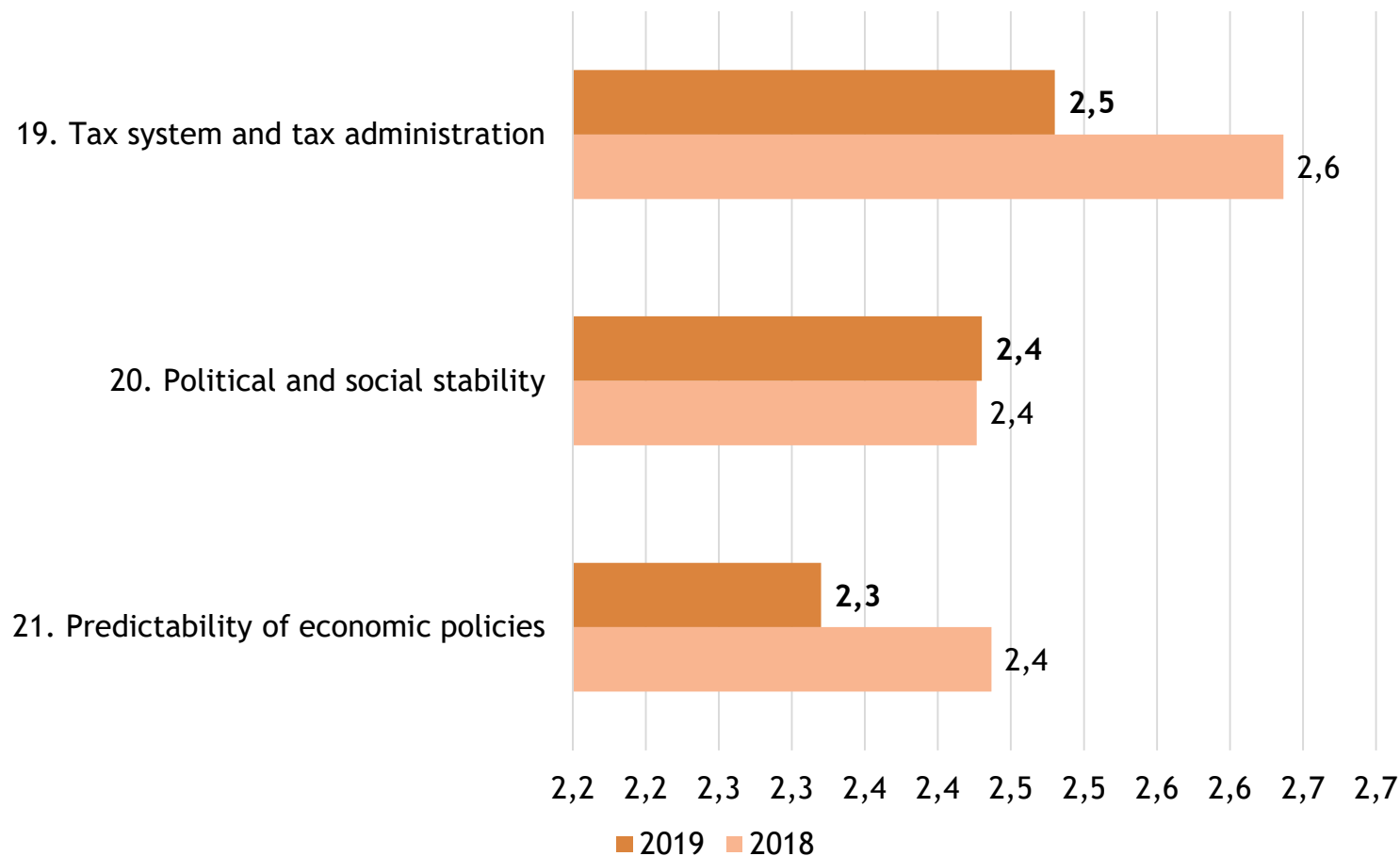
Rank 16-18



Evaluation of investment factors (points of rank 2018/2019, 1 - min; 5 - max)

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The worst rated



Investment factors - changes in the ranking - place in 2018 and 2019

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Adequacy of vocational training



12. Place 2018 + 3 9. Place 2019

Quality and availability of local
suppliers



5. Place 2018 + 2 3. Place 2019

Payment morale



7. Place 2018 + 2 5. Place 2019

Availability of specialized stuff



17. Place 2018 + 2 15. Place 2019

Public administration



14. Place 2018 + 2 12. Place 2019

Investment factors - changes in the ranking - place in 2018 and 2019

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Labour costs



9. Place 2018 - 4 13. Place 2019

Higher education



3. Place 2018 - 3 6. Place 2019

Infrastructure (transport,
communication, IT, energy)



6. Place 2018 - 1 7. Place 2019

Legal flexibility of employment



13. Place 2018 - 1 14. Place 2019

Transparency of open invitations
to tender

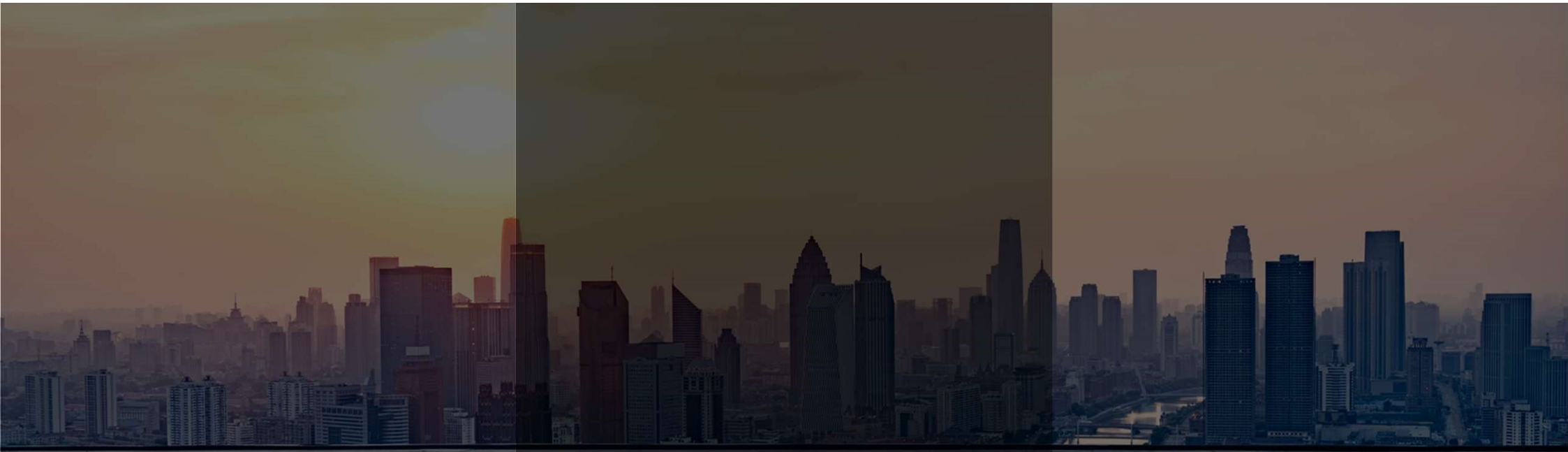


15. Place 2018 - 1 16. Place 2019

Legal safety



16. Place 2018 - 1 17. Place 2019

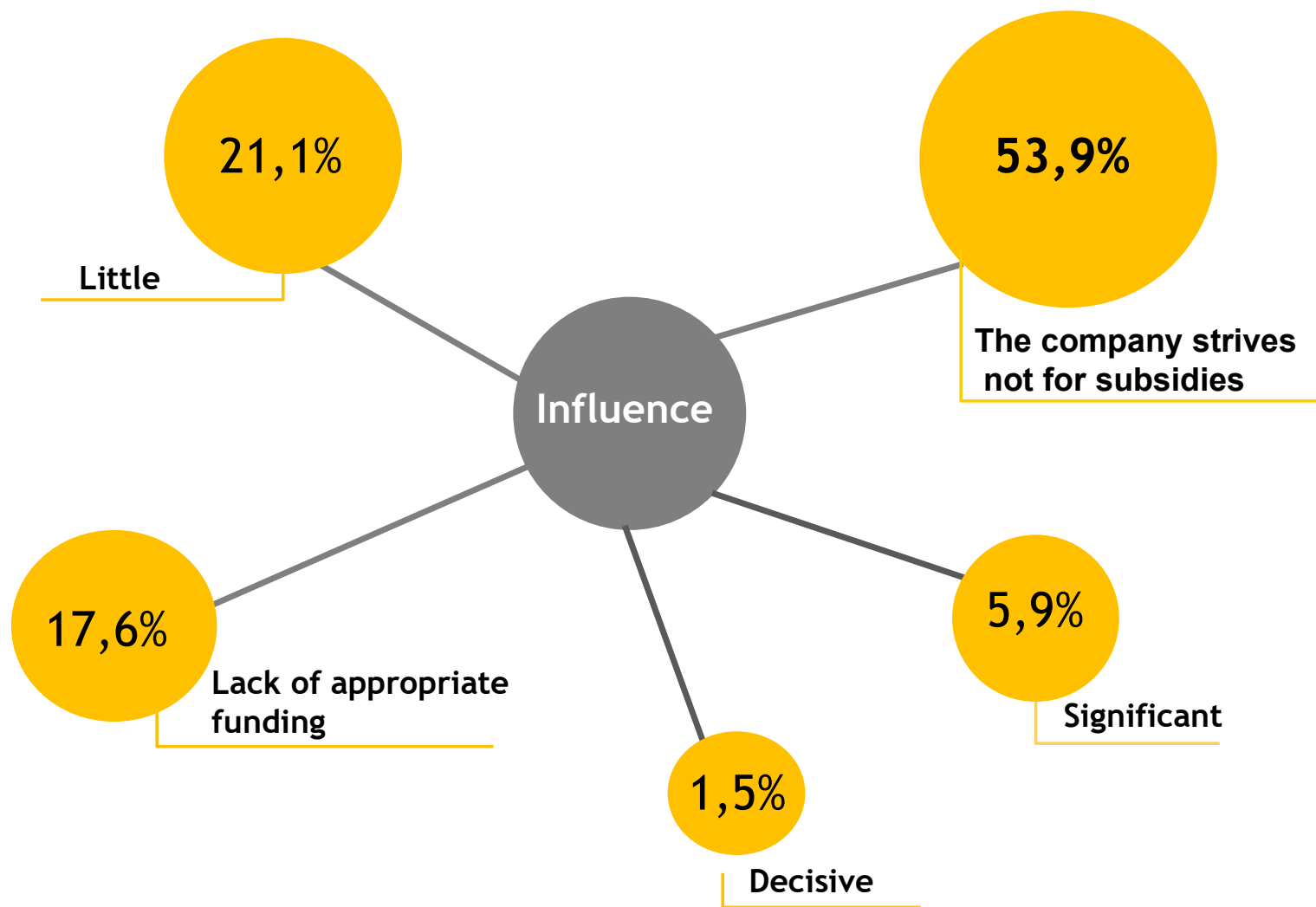


Part IV

Investment attractiveness

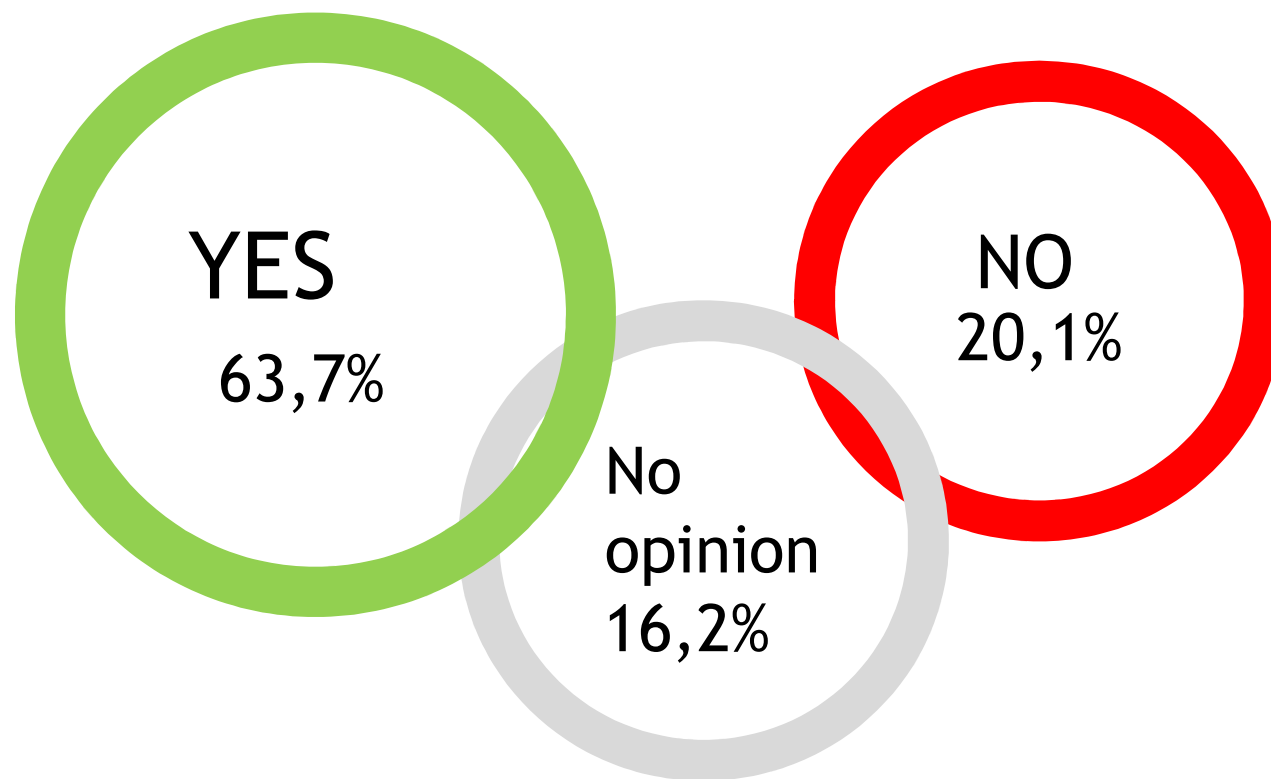
What influence do EU subsidies have on investments in your company?

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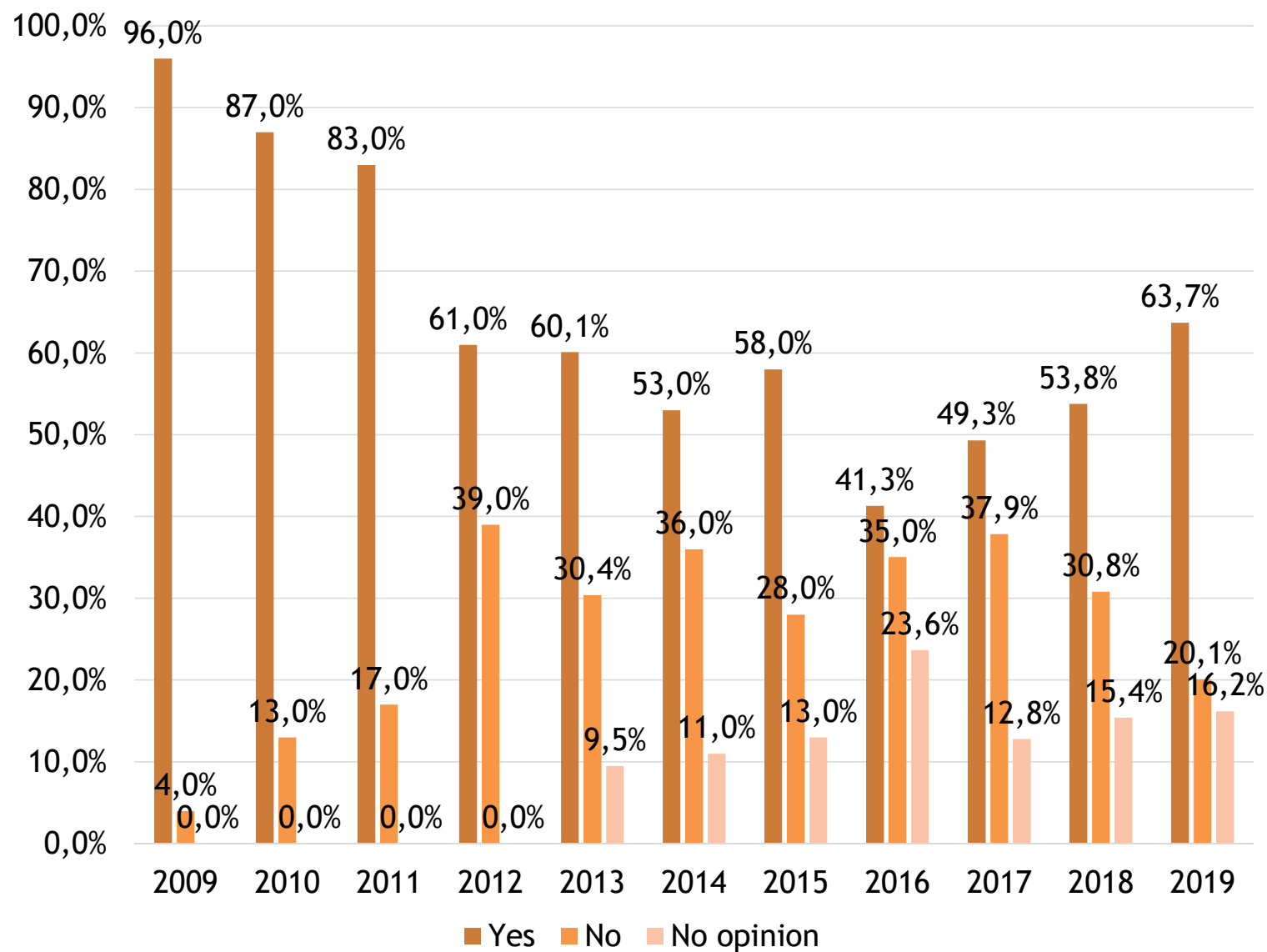
Should Poland
join the euro
zone?

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Are you in favor of
introducing the
euro in Poland?

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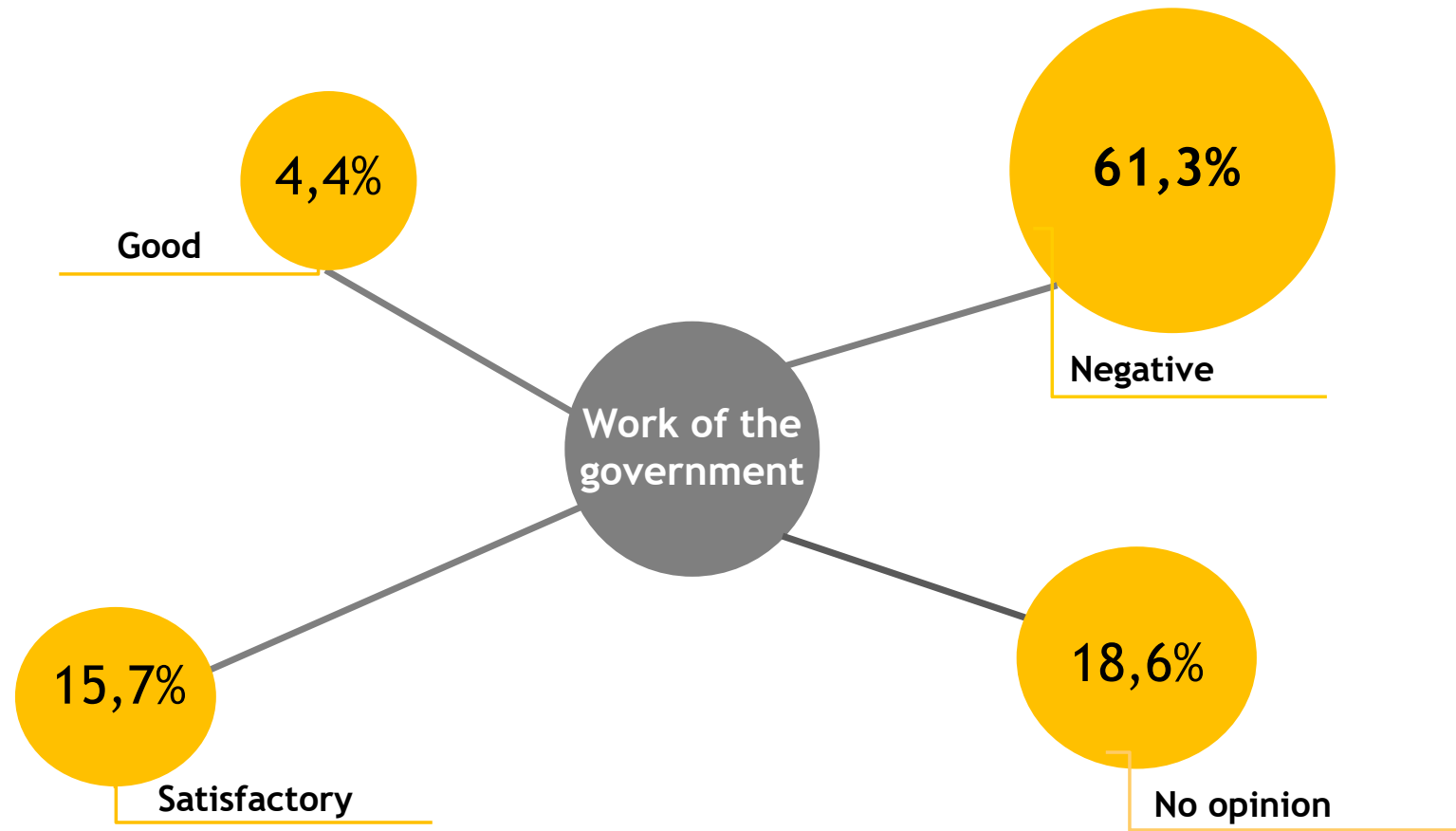
Will Brexit impact your business?

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	Certainly yes	Rather yes	Rather not	Probably not	No opinion
No impact	22,3%	20,8%	18,3%	14,3%	24,3%
Profit decline	5,5%	14,0%	27,0%	21,5%	32,0%
Export decline to the UK	5,5%	8,9%	21,9%	28,9%	34,8%
Order decline from the UK	5,0%	12,9%	19,8%	27,7%	34,6%
Cost increase, especially:	6,7%	15,4%	25,6%	23,6%	28,7%
- Transport costs	9,9%	17,3%	22,3%	23,8%	26,7%
- Duties	10,1%	18,2%	17,7%	26,2%	27,8%
- Costs for certificates, permits	9,0%	18,5%	19,5%	25,5%	27,5%
Disruptions in the supply chain	10,0%	23,5%	18,5%	21,5%	26,5%
Problems with the availability of employees	5,5%	8,0%	34,3%	20,9%	31,3%
Difficulties in attracting business partners	2,9%	12,9%	31,7%	19,8%	32,7%
Investment decline for companies in the UK	6,5%	13,9%	17,9%	34,8%	26,9%
Withdrawal of companies from the UK	0,5%	6,4%	20,8%	40,6%	31,7%

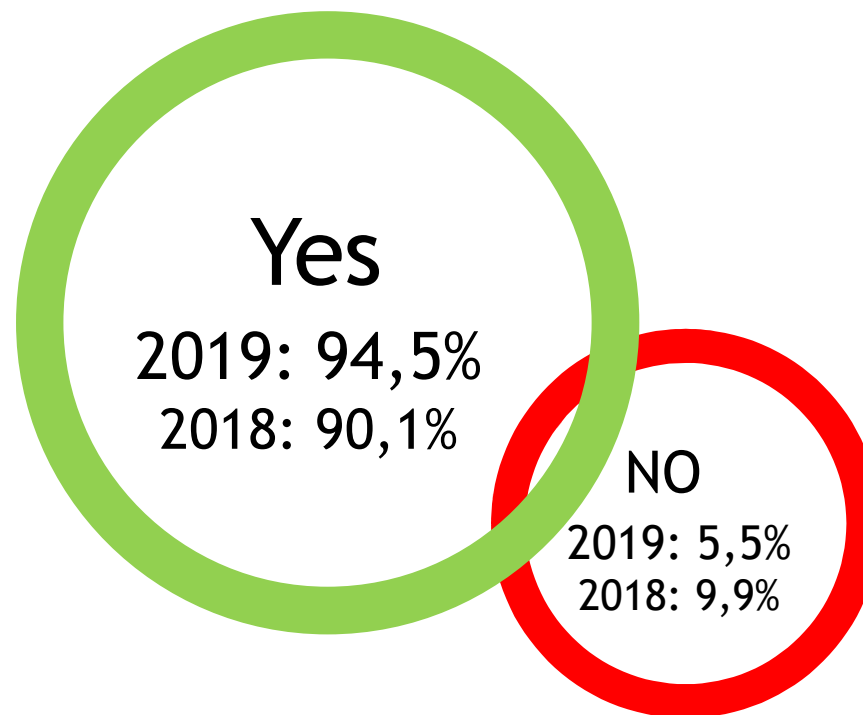
How do you rate the
work of the current
government?

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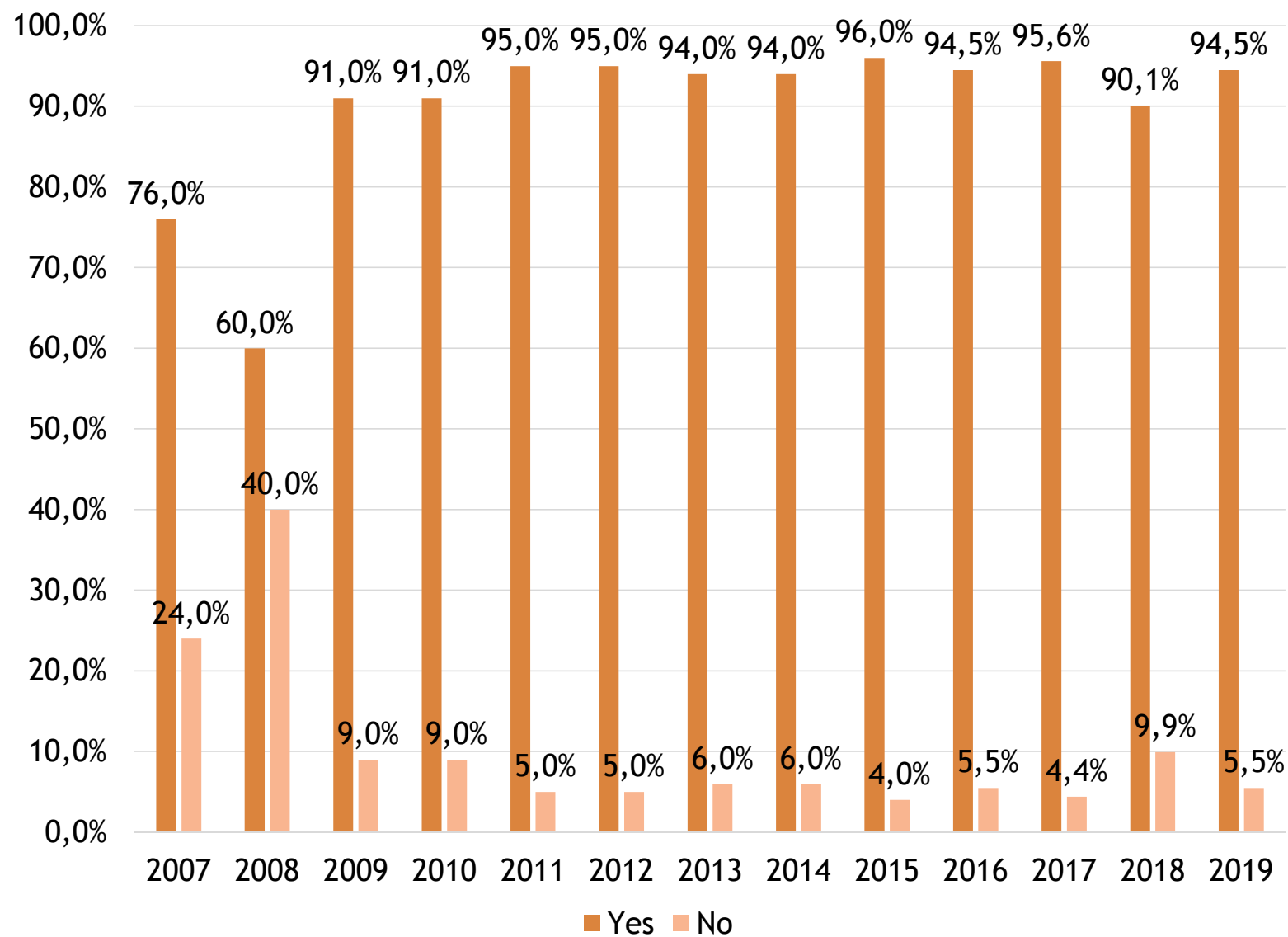
Would you Invest in
Poland again?

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Would you Invest in
Poland again?

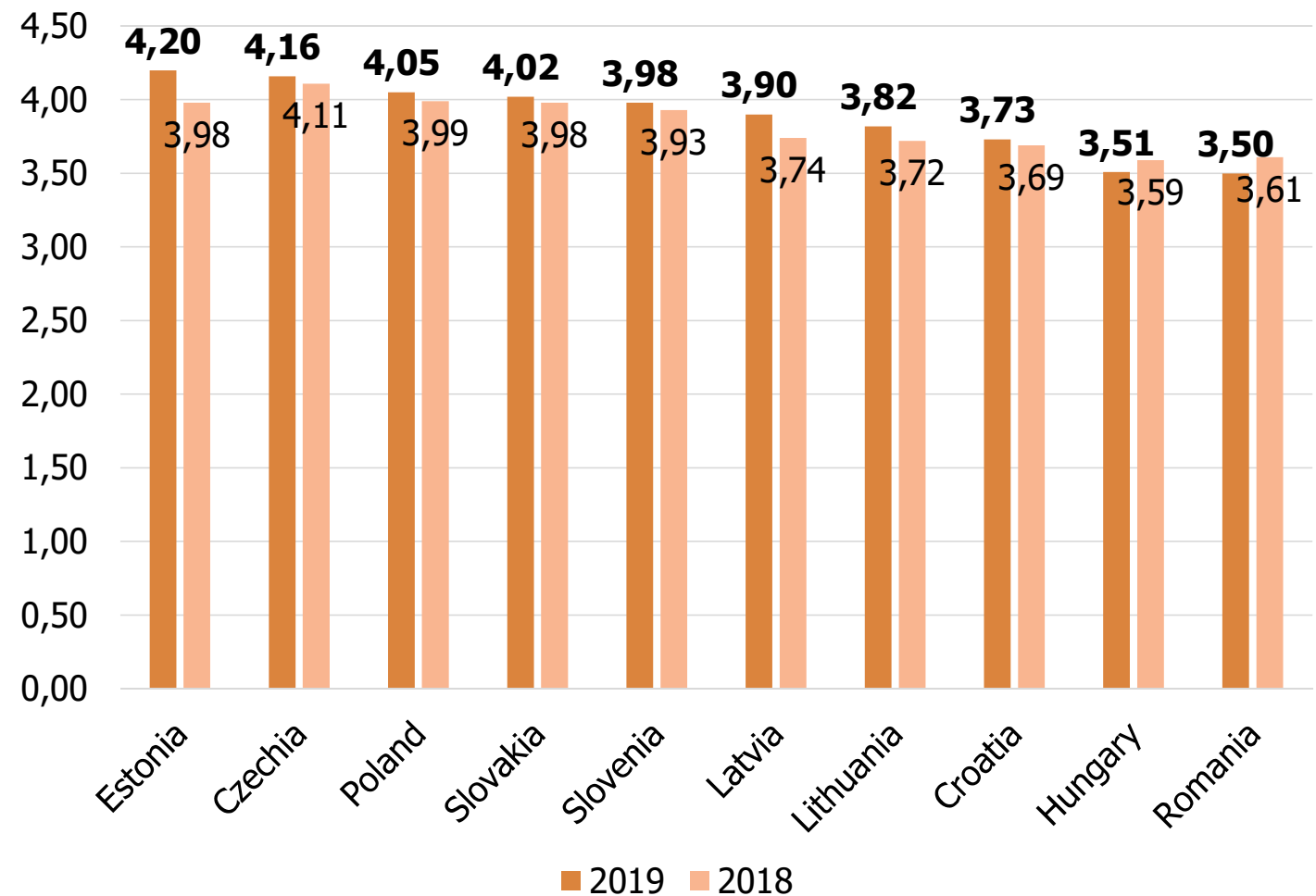
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Investment
attractiveness of
CEE countries in
2019 according to
1400 investors
from the region

Ankieta koniunkturalna 2019

6 - very attractive
1 - not attractive at all





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Thank you for your attention!
