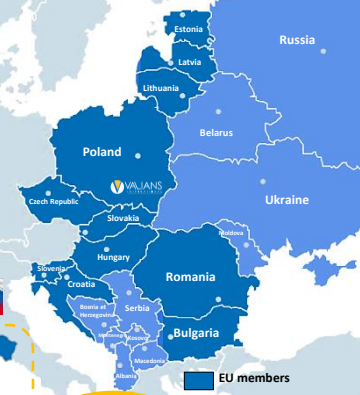


Central and Eastern Europe



- **21 countries (11 members of the EU)**
- **350 millions inhabitants**

| | PL Poland | RO Romania | CZ Czech Republic | HU Hungary | SK Slovakia | 3 main countries outside the EU Russia Belarus Ukraine |
|---------------------------|-----------------------|-------------------|------------------------|---------------------|----------------|---|
| Population | 38,0 Millions | 20,0 Millions | 10,6 Millions | 9,8 Millions | 5,5 Millions | - An area of 2 times the size of the United states |
| Currency | Zloty € 1 = 4,3 zł | Leu €1=4,56 Ro | Koruna €1 = 26,1 Kč | Forint €1=303 ft | Euro | - A global market of 200 millions inhabitants |
| Unemployment | 3,5 % | 3,8 % | 2,1 % | 3,7 % | 6,1 % | - Important agricultural, industrial and energetic resources. |
| GDP per capita | € 13 205 | € 8 535 | € 18 774 | € 12 878 | € 16 581 | - Need for modernization |
| GDP growth rate, 2018 | 5,1 % | 3,9 % | 2,9 % | 4,0 % | 3,9 % | - Existing entry and custom barriers |
| Hourly labour cost | € 9,4 | € 6,3 | € 11,3 | € 9,1 | € 11,1 | Necessity to be supported by experts |
| European funds, 2014-2020 | € 82,5 bn | € 23 bn | € 22 bn | € 21,9 bn | € 12,9 bn | |

Automotive industry

€ 63 billions of annual turnover. Main industrial sector with major international car producers : PSA, GM, Renault, Toyota, Skoda, VW, Hyundai, Man...
More than 2000 OEMs (Michelin, Valeo, Faurecia, Yazaki, Montuper, Daimler, Continental...)
Main countries : Poland, Czech Republic, Slovakia, Hungary, Romania

Aeronautics

1^{er} exporter of sport aircrafts (more than 2/3 of worldwide fleet). One of the main international aeronautic hub, sub-contracting : EADS, Boeing, Dassault, Embraer, Sikorski, Safran, Thomson... maintenance, general aviation
Main countries : Czech republic, Poland, Romania, Russia

Construction

€ 40 to 60 billions of European funds will be allocated for the development of infrastructure : highway network and road extension , modernization of train stations, railways airports.
Increasing demand of new housing, offices, shopping malls.
All countries

Main growing sectors

5 reasons to develop your business in Central and Eastern europe

- 1 Geostrategic position**
« bridge » between Europe and Asia
- 2 Growth engine of EU's economy**
Dynamic development in order to catch-up with western European standards
- 3 Low wages and investments costs**
- 4 Important funding**
European funds, subventions...
- 5 Huge needs for modernization**

Others : Tourism, chemical, furniture

Agriculture / food industry

« Bread Basket of Europe »
Strong agricultural tradition with an increasing number of foreign investments (very fertile black soil and attractive field price) Russia, Ukraine, Hungary, Moldova, Serbia, Poland.
Food industry : important know-how, acquisition and modernization of equipment (machinery, process...) presence of major international players: Nestlé, Danone, Kraft Foods.

Health

34 000 operational pharmacies in Central Europe. Important producer of drug and generics. Huge growth in local market of drug, food supplement and cosmetic consumption
Improvement of heath condition, hospital renovation and needs for modern equipment.
Main countries : Poland, Czech Republic, Slovenia, Hungary

Energy

« Main challenge »
Development of alternative and green energies in order to reduce CO2 emission and achieve the objectives dictated by the European Union : important place for nuclear energy and renewable energy (growth in solar and wind power, biomass). Project of gas pipelines in order to secure dependence from Russia. Among the biggest producer of coal, important necessity of modernization of mines and equipment.
All countries

Externalisation / TIC

« Outsourcing Valley »
Currently the most popular low-cost destination for outsourcing services. (IT, BPO, R&D, Shared Service Centre)
Continuous growth in ICT for the last 10 years. Large demands from private and public sectors : banking, telecom, audiovisual, institutions...
Main countries : Poland, Baltic States, Romania, Bulgaria