



Poland - A View from a Distance
By Lanie Denslow

Architecture, sausages, the Pope, music, corruption, and beauty. Dangerous, emerging economy, skilled workforce, risky, bureaucratic. Dramatically different words used to describe personal views of Poland, the place, the business environment.

The words are not a random assemblage but rather a selection of replies to specific questions in a recent survey. The purpose of the survey was to capture current impressions of Poland, both of the country itself and as destination for business.

This project was a follow up to the panel discussion at the recent CEO forum concerning the question of how the image of Poland abroad effects doing business in Poland.

During October and November sixty-five people were asked two questions: What image comes to mind when you think of Poland? What is your impression of Poland as a place for business? Thus survey was conducted informally, by the author of this article, through personal interviews, phone conversations and via e-mail. The majority of those interviewed were Americans, based in California. Six of the sixty-five surveyed, approximately 9%, came from outside California. Their locations included New York, New Zealand, the United Kingdom, France and Lithuania.

The survey respondents presented a diversity of age and experience. Included were graduate and undergraduate students, international bankers, marketing and organizational development consultants, protocol officers, educators, retired executives, as well as other professionals. The ages ranged (estimated) from twenty to sixty-three.

One unexpected element of the survey, at least to the author, was that images of Poland connected with war and destruction, concentration camps were provided by the student as well as the older professionals. It wasn't within the scope of this project to explore the roots of those images. The responses indicate that recent achievements including joining the European Union are not be well known or understood.

While all participants were asked both questions not all sixty-five replied to both. In many cases an extended silence occurred prior to a reply. "Poland, well, I've never thought about it." was frequently the first statement. The following table provides a sample of the responses. A more complete listing is given at the conclusion of the article. Please note that some responses were provided multiple times.

Visual Image of Poland	Poland as a Place to Do Business
No image	No image
Concentration camps	Not very good
Destruction and reconstruction	Stable government
Nice people	Risky
Dreary & depressing	Open with skilled workforce
The Pope	Good opportunities
Corruption	Not technically savvy
Beauty of Warsaw	Old style bureaucratic approach
Music	Dynamic and exciting

In an attempt to understand the overall results of the survey the author categorized responses to each question as positive, negative, no image/opinion. Assignment of the categories was a subjective process and some readers may elect to classify the responses in another way and thereby reach different conclusions. At the very least the replies give a snapshot of current opinion, a view from the distance.

However, using the author's analysis we see that Poland does not have a strong, clear image within this group. Only 44% of the respondents have a favorable visual image. Even fewer, only 29%, have a positive impression of Poland as a place to do business. The responses evidenced little interest in Poland, no sense of potential.

One way to view the results is to consider that overall is to group the lack of image with the negative impressions, and see that group as the majority of responses. For the question concerning an image 56% were negative or had no visual impression. On the idea of Poland as a business destination, slightly more than 70% had a negative opinion or no idea at all. They clearly do not see the country Piotr Freyberg as described at the CEO Forum as one of the most important markets for 3M globally.

Even the potentially encouraging result, the 44% positive response to the question about image, reveal a limited knowledge of Poland and no clear identify, no strong brand that is Poland. This result is consistent with the results of the BBC World/ Warsaw Destination Alliance survey completed earlier this year and may further Nicholas Robinson's contention that because a strong image (for the country) is lacking that the government should established a program to define and communicate one.

One study of brands as identity for a country, proposes that the brand of a country may not simply be part of a marketing program but of greater importance. According to the Anholt National Brand Index 2006 it is possible to assign value to a country's brand. In this report valuations included \$18 trillion for the United States a country that today has an extremely mixed opinion of its brand, \$3.5 trillion for the United Kingdom, the highest value of the countries within the European Union, and \$43 billion for Poland. It is possible to imagine that more precise brand image could add significantly to that value.

In reviewing the results of this small survey it is important to keep in mind the physical location of the participants. California is a great distance from Poland, not simply physically. While AmCham's Chairman, Roman Reward, pointed out in the *American Investor's* 2006 issue of Doing Business in Poland, America, the American government, and its institutions supported Poland's transition to its place today. However, in

California Poland still something of an unknown. For example, of the people surveyed only four had actually visited Poland, although most of the group had been to other countries within the European Union.

This is not to say that the lack of information exists only in relation to Poland. Members of the Los Angeles Consular Corps community observe that people in the Western United States do not generally understand the commercial potential that exists for California businesses in any part of Europe. They further comment that for Californians tend to focus on Asia, increasingly China, Vietnam, rather than Europe as destinations for expansion.

While we considered a lack of image/opinion as negative in the earlier part of this article, it is just as easy to consider those responses neutral, perhaps indicating the potential to create a positive opinion. If one then combines the positive replies with the no opinion, the result is 64% who hold a positive or neutral image of the country and 66% are positive or neutral about Poland as a business destination. Viewed from this mind-set the results are encouraging, suggesting that it may be possible to educate people, engage them with the next stages of economic development in the country.

Given that perspective, AmCham, as the leading voice of business in Poland, is uniquely positioned to make a difference. It has the ability through its membership to support an effort to redefine the environment, explain the potential and opportunities that are abundant in Poland. The results may be increased understanding, a new level of support and involvement from the American business community, even those in California.

Survey conducted for The American Chamber of Commerce in Poland, Warsaw, Poland
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Sample Replies to Survey Questions

Image of Poland

Place to Do Business

No image

Not very good

Dangerous

Competent, gracious people

Strong emerging economy

Lots of natural resources

Probably a good opportunity to start

Developing and welcoming

Tension between old and new ways

Strong growth potential

Pretty good (potential)

Small

Not technically savvy

Risky

Stable government

Old style bureaucratic approach

Open with skilled workforce

Dynamic and exciting

Lacks conditions conducive to business

Cheap labor

Good opportunities

Cold war

Images

No image

Grey

Concentration camps

Anti communist

Communist

War

Snow

Cold, dreary

Industrial/grey

Repression

Sausage

Krakow Jewish festival

Pastoral and bright

Peasant girl with braids

Gingerbread

Destruction and reconstruction

Nice people

Movies

Music

Dreary & depressing

World War II

Solidarity

The Pope

Corruption

Beautiful

Beauty of Warsaw