



BUSINESS INFORMATION WEBINAR

IS THE UPSWING OF CEE ECONOMIES
COMING TO AN END?

12 JANUARY 22

AGENDA AND YOUR REFERENTS



01

INTRODUCTION
DOROTA ANGOTTI

- Regional Business
Information Director
Credit Management
Services



02

IS THE UPSWING OF CEE
EXPORTS COMING
TO AN END?

GRZEGORZ SIELEWICZ

- Coface Chief Economist in Central
and Eastern Europe



03

**ECONOMIC INSIGHTS - GLOBAL
ECONOMIC DATA TO INVEST
CONFIDENTLY**

CAROLINA STEIN

- Coface Group Product Manager

QUESTIONS?



Please feel free to ask your questions via the question panel on the right sidebar menu.

All questions will be live asked to the referents at the end of the webinar.

(1) Open the sidebar menu



(2) Enter your question

A screenshot of a webinar interface. The top part shows the 'Audio' settings window, which is currently open. Below it, the 'Questions' panel is visible, containing a text input field with the placeholder text '[Enter a question for staff]' and a 'Send' button. The bottom of the screenshot shows the webinar title 'Webinar Housekeeping' and the ID 'Webinar ID: 608-865-371', along with the 'GoToWebinar' logo.

File View Help

Audio

Sound Check

Computer audio

Phone call

MUTED

Transmit (Plantronics Savi 7xx-M)

Receive (Plantronics Savi 7xx-M)

Talking: Liz Davis

Questions

[Enter a question for staff]

Send

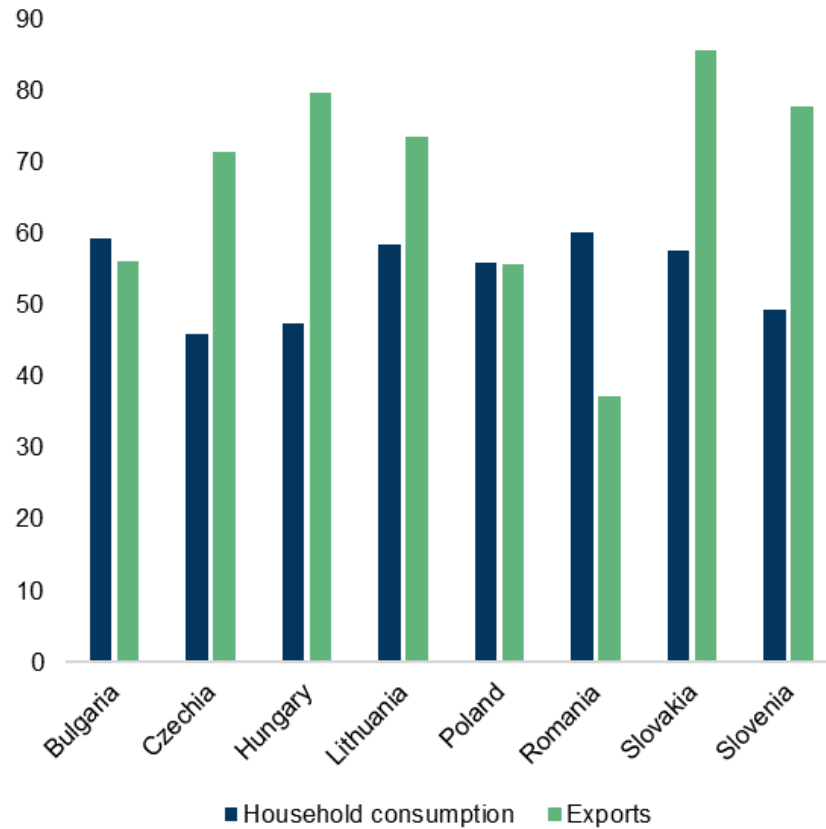
Webinar Housekeeping

Webinar ID: 608-865-371

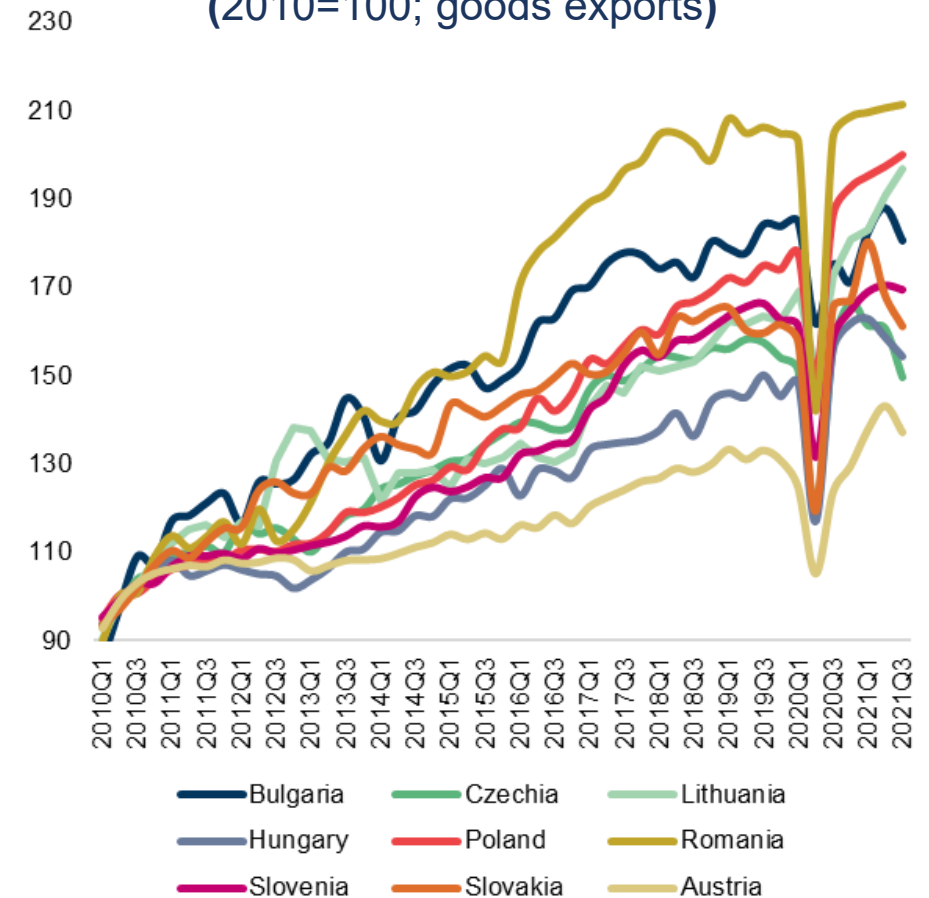
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EXTERNAL DEMAND REMAINS CRUCIAL FOR CEE ECONOMIES

Share of household consumption and exports in nominal GDP (%)



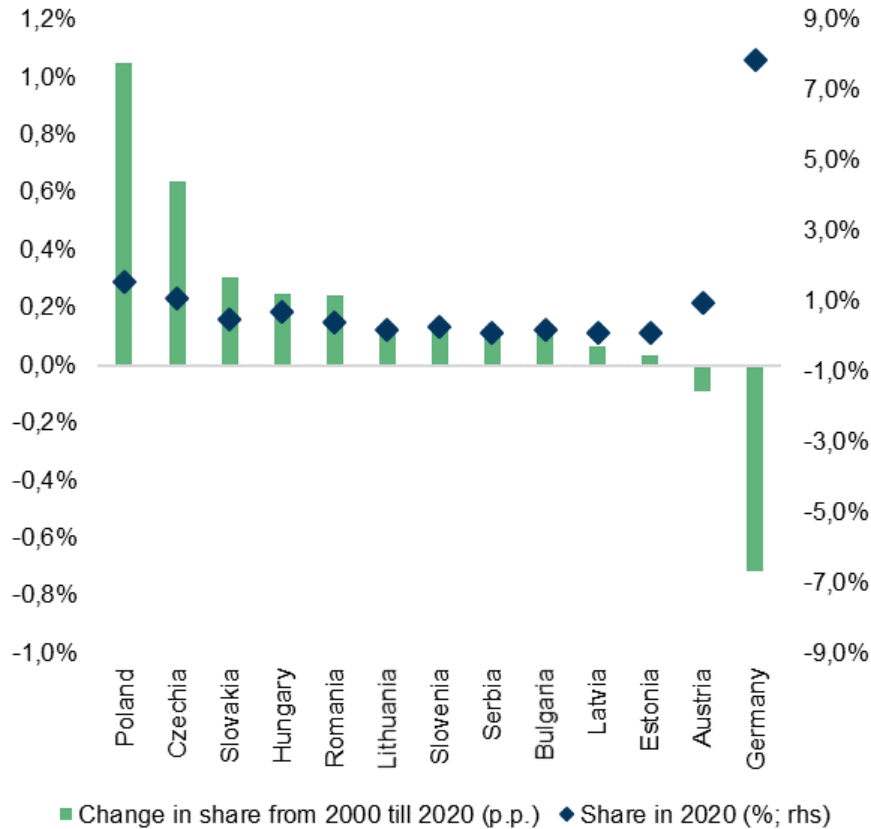
Exports growth (2010=100; goods exports)



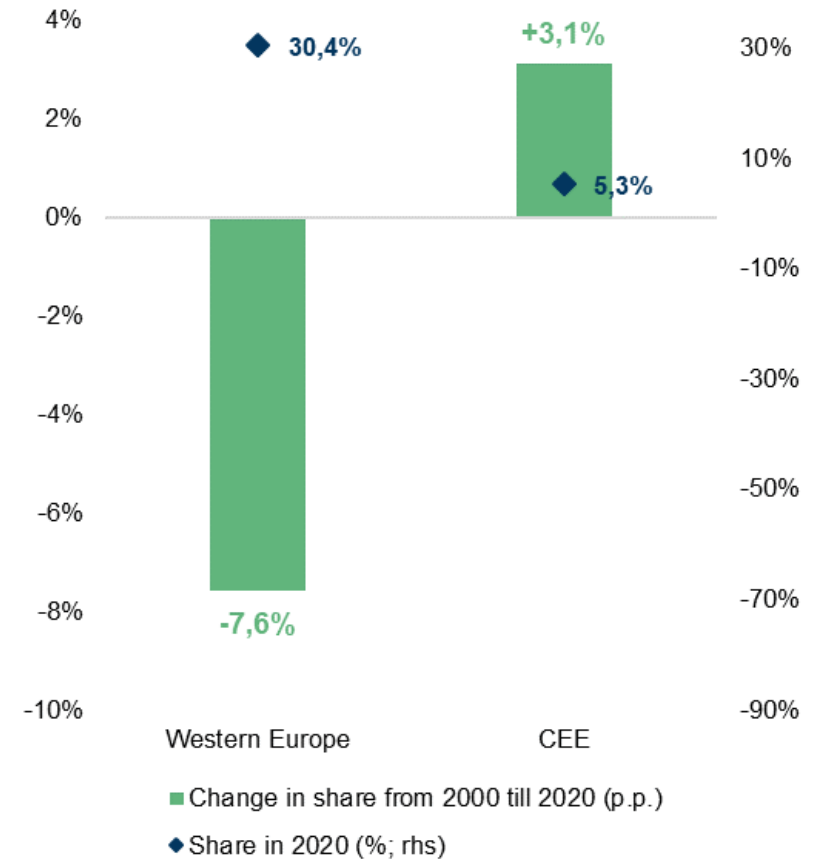
Source: Eurostat, Coface

CEE GAINED BIGGER SHARES IN GLOBAL TRADE

Countries' share in global merchandise exports (%)



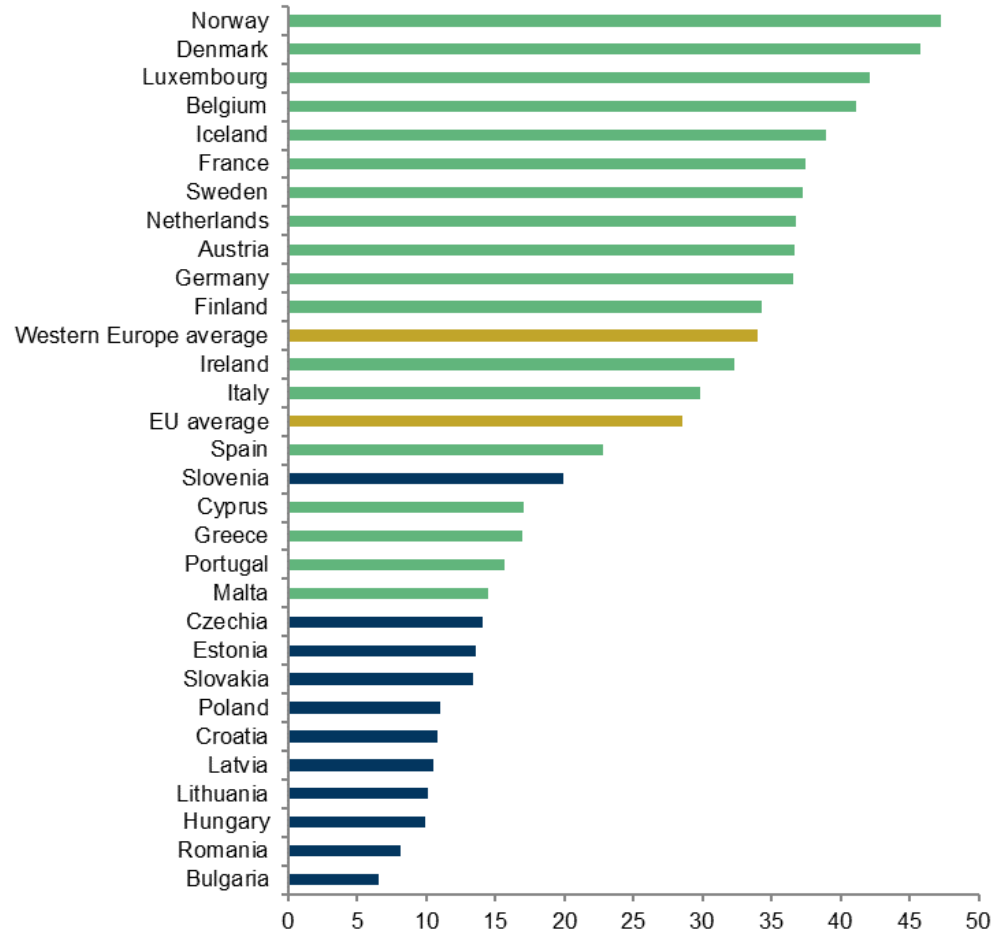
Regions' share in global merchandise exports (%)



Source: WTO, Coface

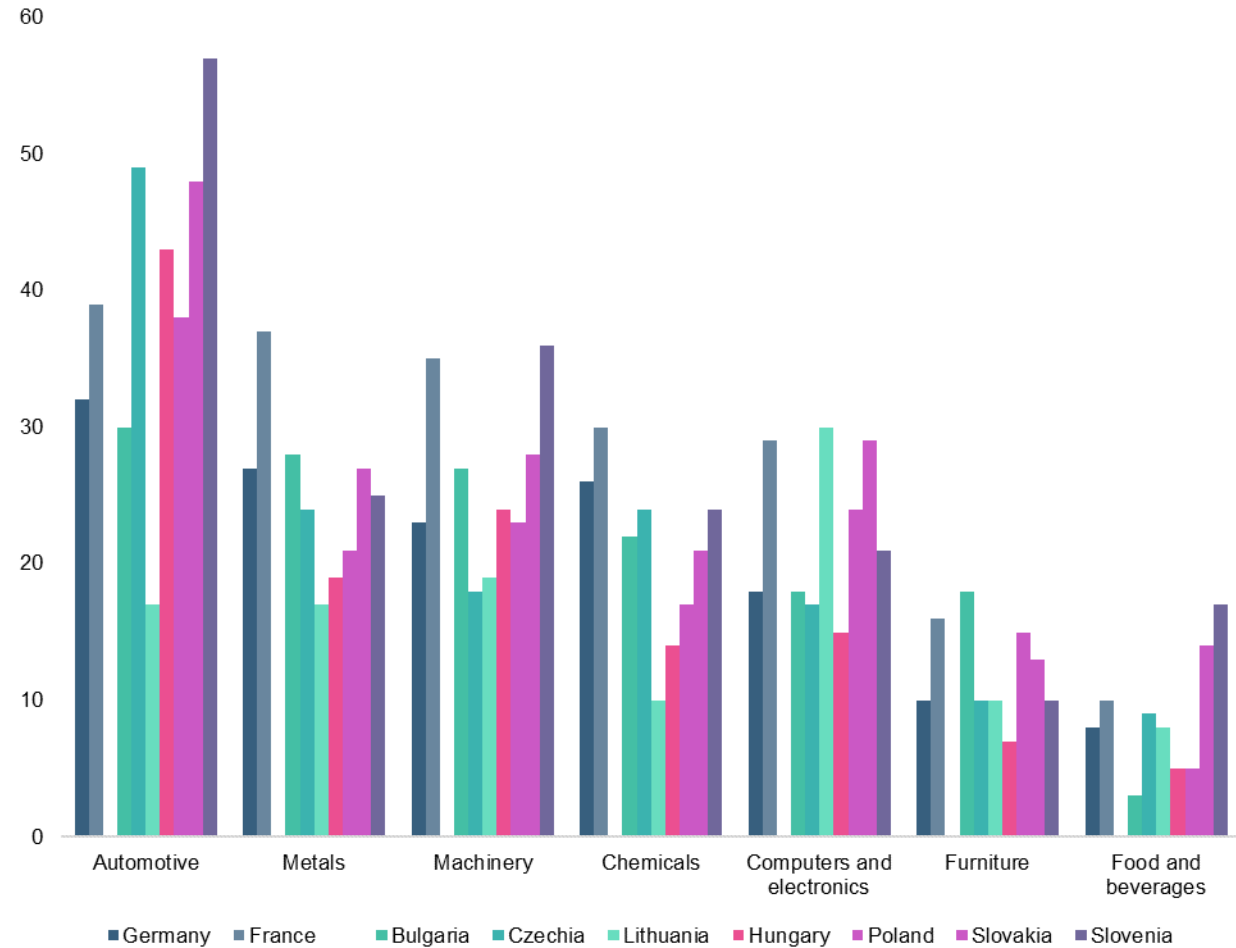
CEE LABOUR COSTS REMAIN ATTRACTIVE AMID INCREASED PRODUCTIVITY

Labour costs
(EUR/h, 2020)



Source: Eurostat

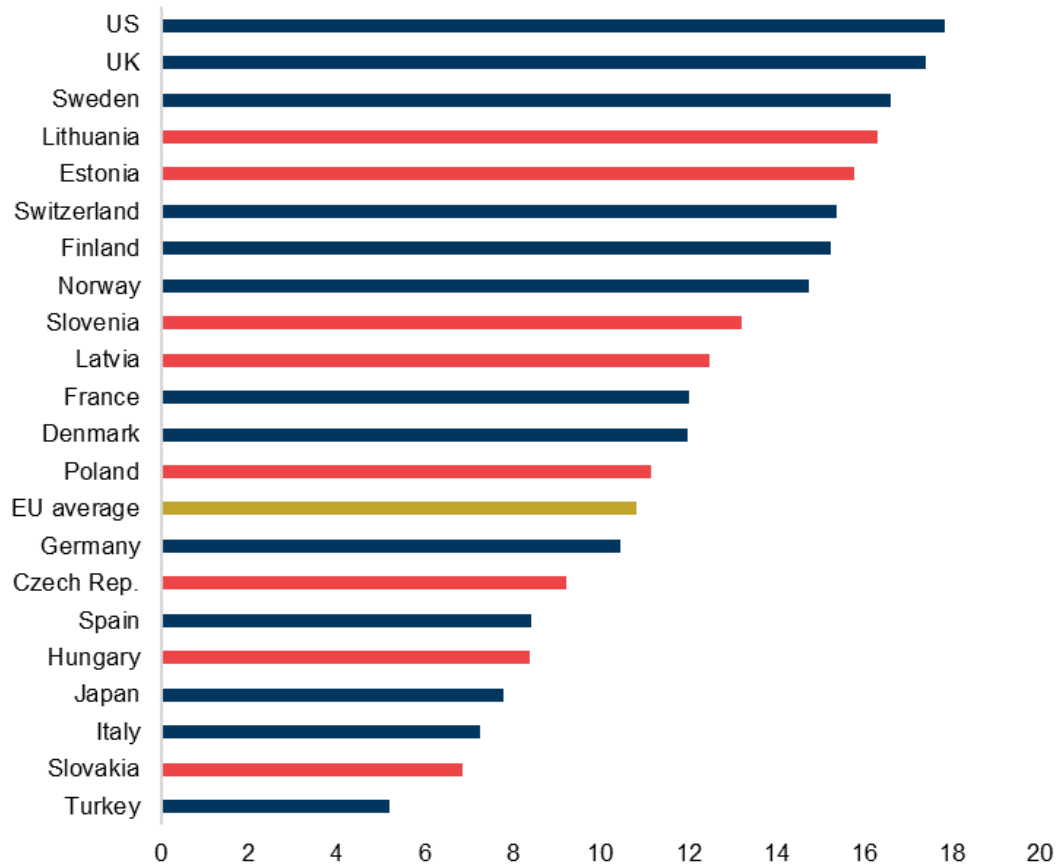
Automation: Use of industrial or service robots
in selected sectors (% , percentage of enterprises, 2020)



Source: Eurostat

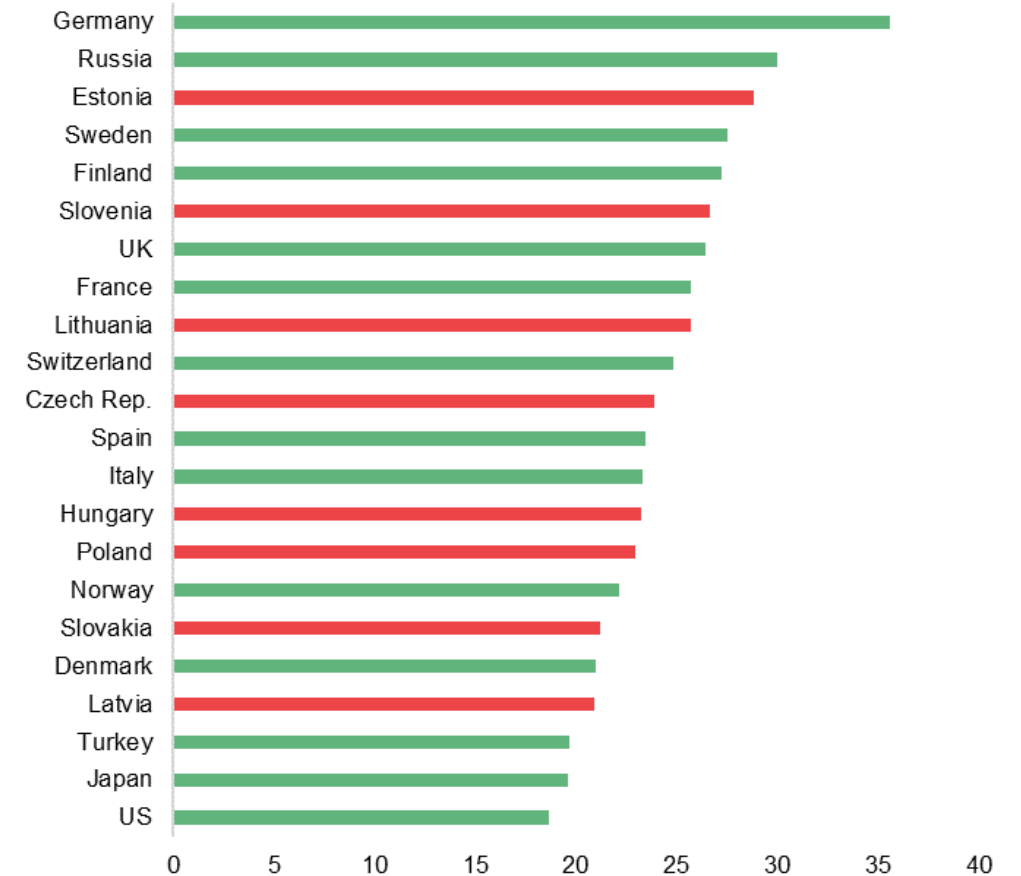
INCREASING DIGITALISATION SUPPORTS COMPETITIVE ADVANTAGE

ICT task-intensive jobs as a share of total employment (%)



Source: OECD Going Digital Toolkit

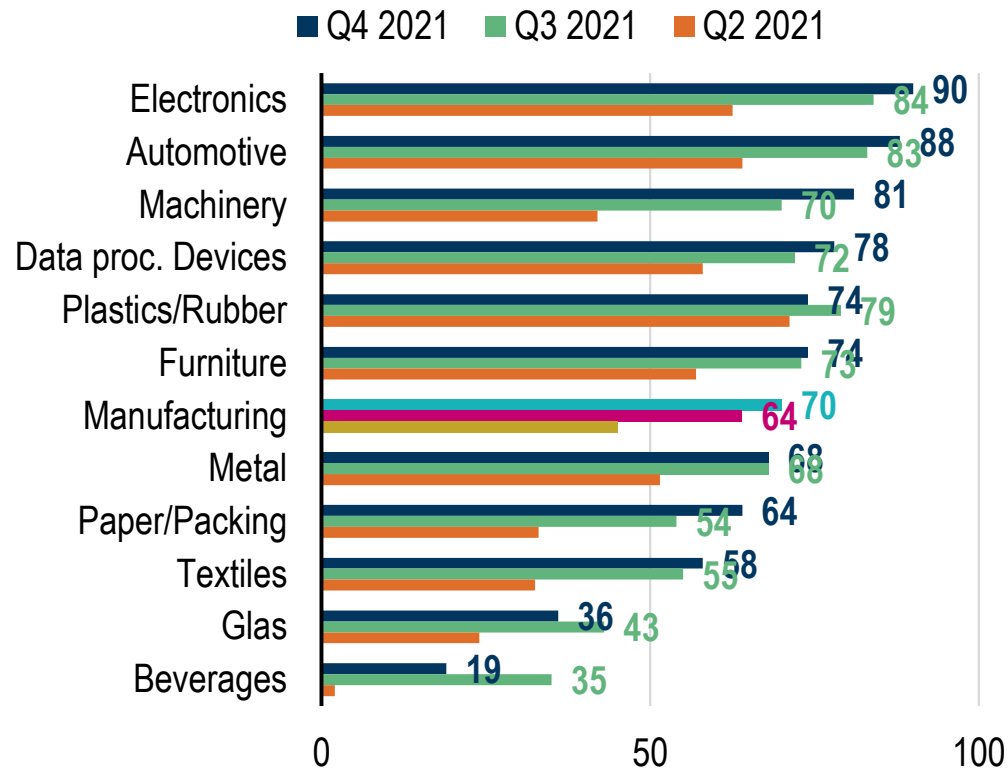
New tertiary graduates in science, technology, engineering and mathematics as a share of total new graduates (%)



Source: OECD Going Digital Toolkit

SUPPLY CHAIN DISRUPTIONS SHOULD BE LESS HARMFUL STARTING 2H 2022

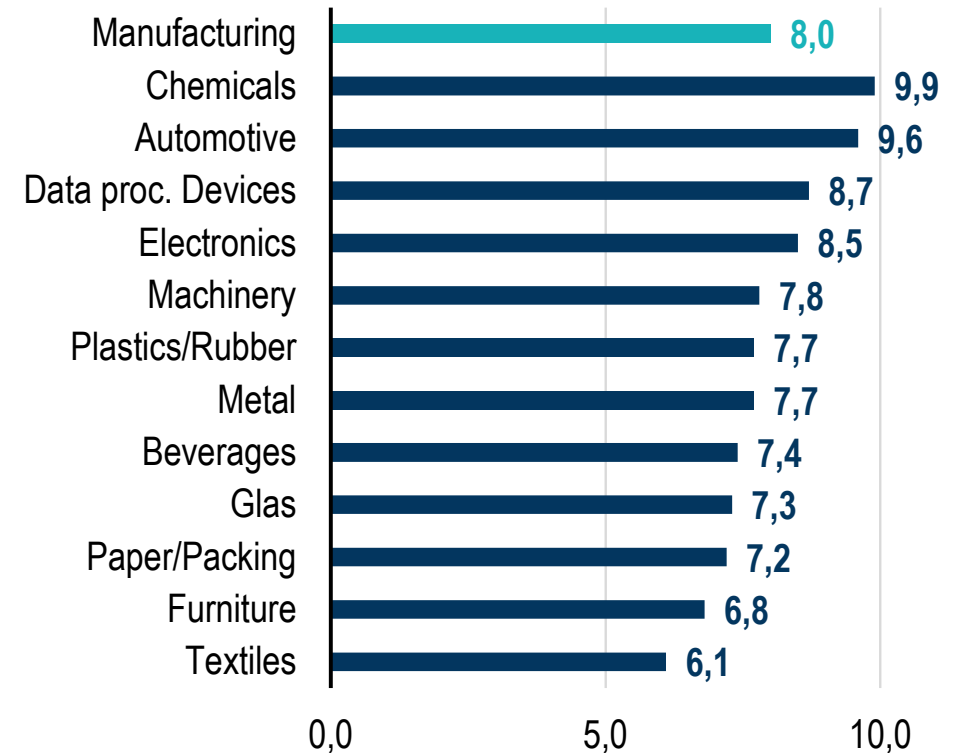
Germany: Share of companies naming the shortage of input goods as the main problem (in %)



Source: IFO, Coface

Germany: Estimated duration of supply bottlenecks

(IFO survey in October 2021, answers in months)



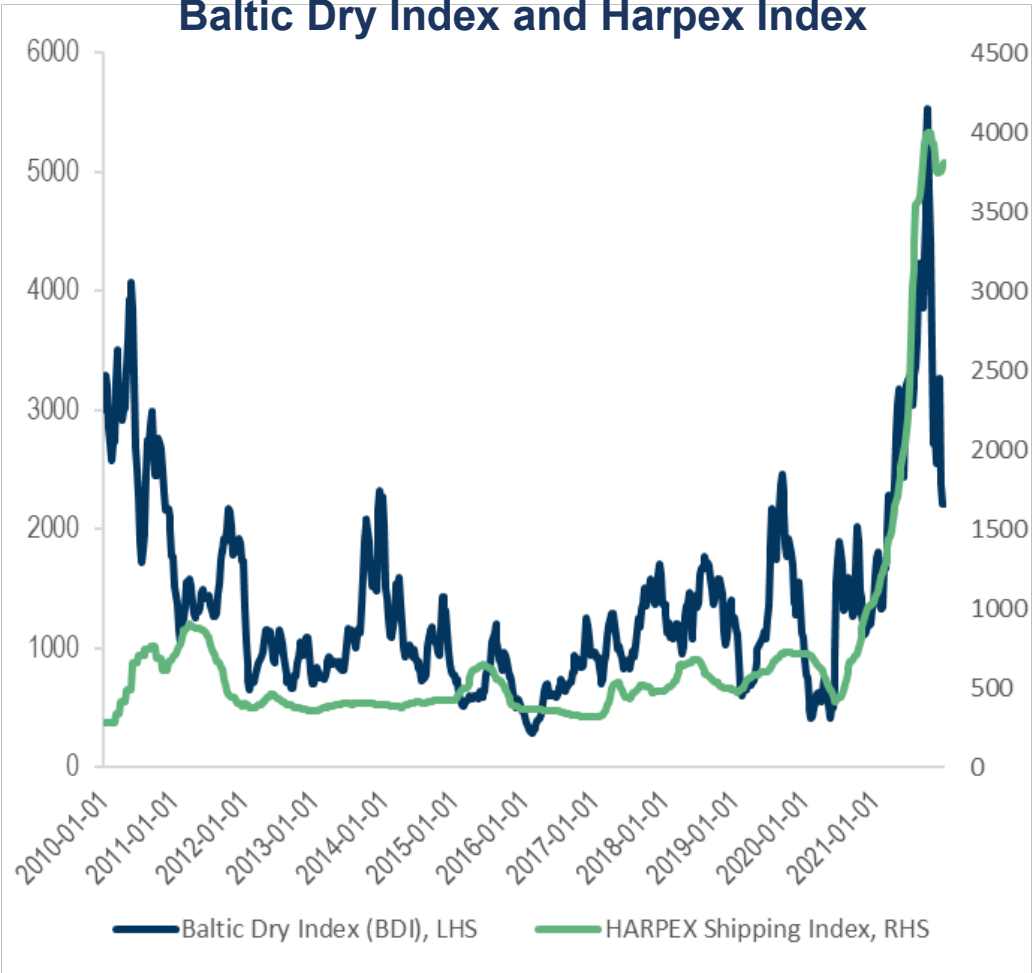
Source: IFO, Coface

MARITIME TRANSPORT COSTS HAVE EASED

Container Throughput Index
(YoY growth)



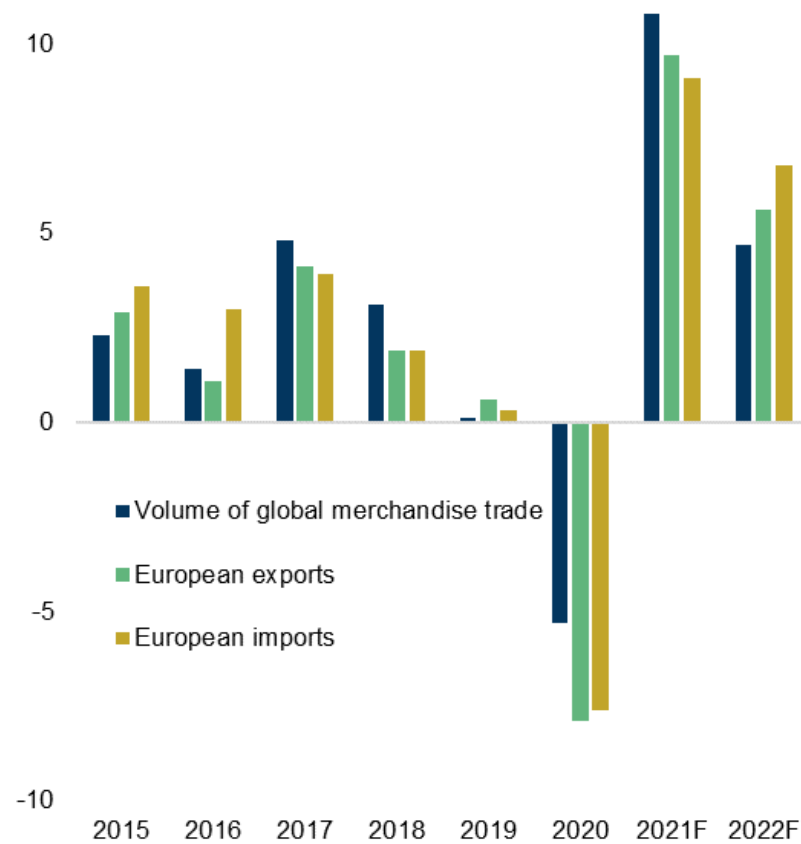
Maritime freight rates:
Baltic Dry Index and Harpex Index



Source: Harpex exchange, Baltic exchange, Datastream
Latest point: 31 December 2021

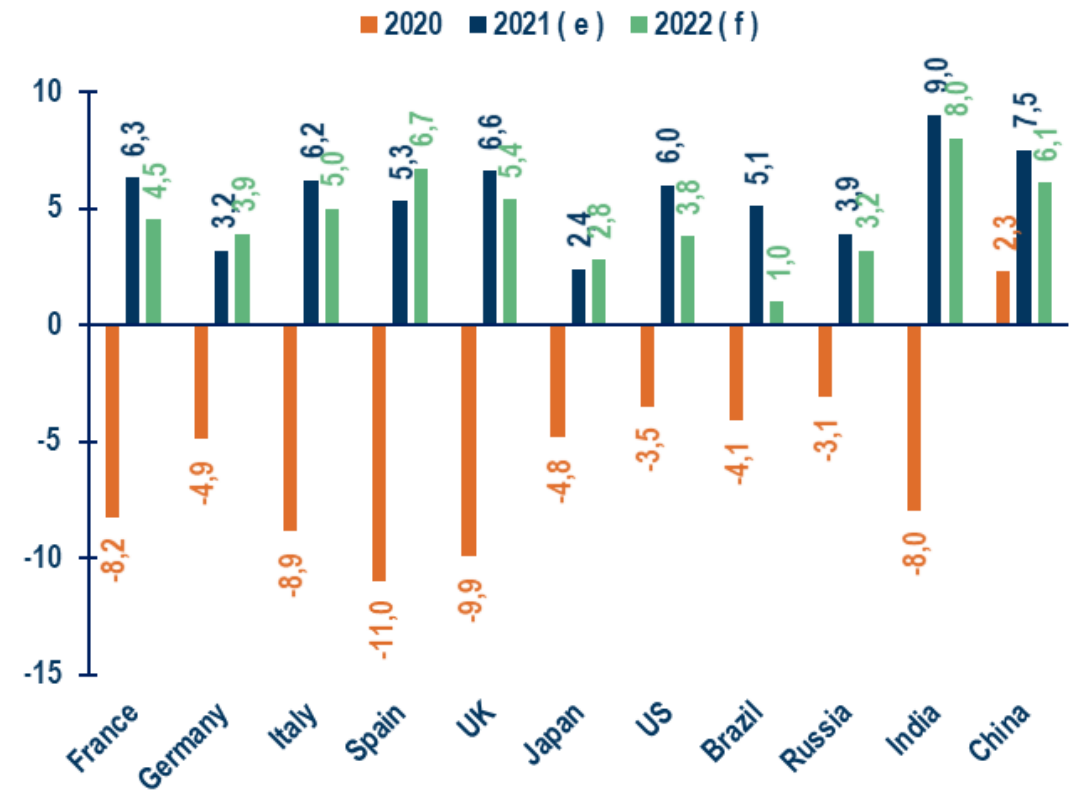
SLIGHT SLOWDOWN AHEAD, BUT THE RECOVERY REMAINS ON TRACK

Global trade growth (%, YoY)



Source: WTO, Coface

Coface GDP growth forecasts (%)



Source: IMF, Coface

ECONOMIC INSIGHTS

GLOBAL ECONOMIC DATA
TO INVEST CONFIDENTLY

The advertisement features a background of a person in a dark suit standing in front of a large window with a grid pattern. The window looks out onto a cityscape. Overlaid on the window are various digital data elements, including a laptop icon with '165%' below it, a bar chart, and several numbers like '23.734', '25.92.23.734', and '345'. The text 'All the data used by our risk and economic experts in one unique place!' is displayed in white and green on dark blue rectangular backgrounds. The iCON logo and tagline 'Insights for trade' are in the top right corner.

iCON / Insights for trade

All the data used
by our risk and
economic experts
in one unique
place!

ECONOMIC INSIGHTS

UNIQUE INSIGHTS & ASSESSMENTS INFLUENCING THE ECONOMY OF TODAY

WHAT

+ 15 scores, assessments and commentaries for 160 countries

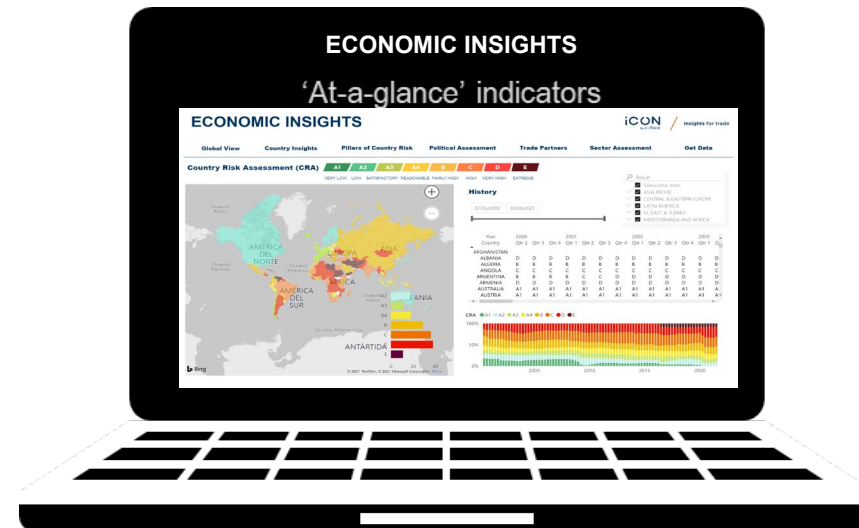
+ 1000 data points with history.

- 160 countries
- 13 sectors

Do you need global economic data to invest confidently?
Are you struggling to follow-up what's happening in your markets?
Are you struggling to keep in pace how the country and sectors contexts impact your business?

Tired to consult many information platforms to run your international business?

TACTICAL & STRATEGIC DECISIONS



WHY COFACE?

- PREMIUM DATA
- EXCLUSIVE ACCESS TO EXPERTISE
- UNIQUE INSIGHTS
- EASY TO INTEGRATE
- SAVE TME & MONEY

WHAT

More than 15 Scores, Assessments and Commentaries for 160 countries
Over 1000 data points with history!

1

Sector Risk Assessment



2

Country Risk Assessment

DEFINITION OF COUNTRY RISK ASSESSMENTS

A1	Very good macroeconomic and financial outlook. Stable political context. Good quality business climate. This environment positively influences company payment behaviour. The average probability of default is very low.
A2	Good macroeconomic and financial outlook. Generally stable political context. Overall good healthy business climate. The average probability of default is low.
A3	Less favourable and/or volatile macroeconomic and financial outlook. Political context remains stable. Business climate may have some shortcomings. The average probability of default is satisfactory.
A4	Economic and financial outlook could be marked by some weaknesses. Political context could suffer from tension. Business climate may present significant deficiencies. The average probability of company default is reasonable.
B	Uncertain economic and financial outlook. Political context could suffer strong tensions. Business climate may present substantial deficiencies. The average probability of company default is quite high.
C	Very uncertain economic and financial outlook. Political context could be unstable. Business climate has substantial deficiencies. The average probability of company default is high.
D	Highly uncertain economic and financial outlook. Very unstable political context. Very difficult institutional and business climate. The average probability of company default is very high.
E	Extremely uncertain economic and financial outlook. Extremely unstable political context. Extremely difficult institutional and business climate. The average probability of company default is extremely high.

3

Risk Assessments influencing Country Risk

- Business Climate
- Macro Economic
- Banking
- Environment
- Political
- Social
- Fragility
- Conflict
- Debtor Risk Assessments
- Payment Insights

4

Macro & Qualitative Assessments

- Strengths & weaknesses
- Risk Assessment
- International Trade Flows