

AmCham.Pl QUARTERLY

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POLAND**

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It's your debate...

"In energy, not only have we delivered, but we have exceeded in our most optimistic expectations".

GEORGETTE MOSBACHER, US Ambassador to Poland,
and AmCham Honorary Chair,
p. 14

"The US should continue its efforts to be pro-active in Poland and work closely with the Polish government."

MICHAŁ KOBOSKO, Director of Poland Office at the Atlantic Council,
p. 12

"A 3.7 percent GDP growth in Europe would be a great growth, and this is a good news for all of us doing business in Poland!"

SŁAWOMIR S. SIKORA, CEO of Citi Handlowy and AmCham Board Member, talking about a Citi forecast of Poland's 2020 economic growth, p. 14

AmCham.pl Quarterly is the official publication of the American Chamber of Commerce in Poland. It is a voice for foreign investors and the business community in Poland. The magazine strives to keep our members and other readers up to date by following chamber news and reporting on the leading trends in business and policy.

"Poland will be soon totally diversified for energy supply which will be good for the Polish economy given there will be no energy crisis and energy price hikes in the foreseeable future."

BOGUSŁAW WINID, Advisor to President Andrzej Duda on Foreign Policy and National Security,
p. 12

"If there are regulations that negatively impact qualified personnel and the competitiveness of the Polish economy, this may limit the number of new investment projects in IT in Poland."

JOLANTA JAWORSKA, Government and Regulatory Affairs Director at IBM Poland & Baltics & Ukraine, and AmCham Vice Chair,
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"Poland needs to find a relevant place in the global economic value chain."

ROBERT NOWICKI, Under Secretary of State at the Ministry of Development, p. 14.

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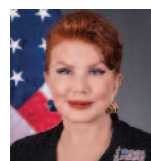
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ADVOCACY OF AMCHAM POLAND

AmCham Poland supports the collective interests of its members by working to affect changes that improve the business environment in Poland through:

- the close monitoring of Polish and EU regulations;
- position papers, policy statements, and advocacy letters;
- direct and frequent interaction with policy-makers;
- active participation in the rule-making process.

All AmCham Poland's position papers are available at <http://amcham.pl/advocacy>.

Our top issues include:

CHANGES TO THE INTERNATIONAL TAX RULES

Having recognized the challenges arising from the digitalization of the economy, the Organization for Economic Cooperation and Development (OECD) announced a plan to reshape international tax rules. The OECD's plan aims to reallocate some taxing rights to countries where products and services are consumed. It proposes a new nexus, distinct and separate from the existing concept of the permanent establishment, which would ensure a company is taxable in a jurisdiction where its sales exceed a certain threshold even if it is not physically present on the market. The new solution will affect all consumer-facing businesses, not only digital companies.

AmCham presented to the OECD a few aspects of the reform to be taken under consideration. We appeal in particular for:

- a strong dispute resolution mechanism, such as binding arbitration, in place to resolve disputes in both a clear and timely manner;
- treating domestic and foreign firms equally, not favoring certain sectors or technologies over others;
- avoiding double taxation (the new rules should not subject the same profit to taxation by multiple jurisdictions).

THE EMPLOYMENT OF FOREIGNERS IN POLAND

Since economic growth in Poland demands new employees and most of the companies are affected by a lack of candidates and face difficulties when hiring non-EU citizens, AmCham took the initiative aiming at simplification of obtaining work permits.

A report released by the Supreme Audit Office (Najwyższa Izba Kontroli) pointed out that the

public administration does not sufficiently handle the current influx of immigrants in Poland. Completion of all required procedures increased from 64 to 206 days during the last four years. In the most extreme case, the decision was determined after 1259 days from the submission of the application. Candidates for work permits experience the longest wait in the Lower Silesia voivodship, where the average is 328 days. It is not only harmful to businesses but also increases the number of legal cases and financial penalties levied against the voivodes. AmCham aims at extending the period of work permits, strengthening the supervisory of the voivodships and shortening the application procedure.

INTELLECTUAL PROPERTY RIGHTS PROTECTION AT THE POLISH BORDER

AmCham is working on increasing the effectiveness of the customs authorities in the field of intellectual property protection and the battle against counterfeit goods through dialogue with the public sector and drafting anti-counterfeit solutions. The problem of counterfeits affects many business sectors, like toys, clothing, tobacco, pharmaceutical and everyday articles. Despite the 2013 EU Regulation, which introduced an administrative system of border protection in the European Union, the situation seems to be more difficult to control and we observe an increase in counterfeits at the Polish border, since the initiative was introduced. We have established a working group representing AmCham member companies advocating for the increase of effectiveness of border protection. If you are interested in joining the group, please contact AmCham's Legal Team.



LETTER FROM THE CHAIRMAN

DEAR AMCHAM
MEMBERS AND FRIENDS,

2020 is off to a fast start, in the economy and the wide range of AmCham activities and initiatives. The Board of Directors and the AmCham team look forward to working with you all throughout the year to support your companies, employees and the Polish market.

In the last year our efforts at advocacy and consultation with policy makers have paid dividends through the adaptation of new rules and regulations which should benefit innovation, science and economic growth. The development of the IP Box (intellectual property), incentives for research and development, the introduction of the Simple Stock Company structure and the corporate income tax changes for special investment vehicles are all steps in the right direction.

As an organization we also engaged significantly during 2019 in the consultation and impact discussion on the proposed changes to the social insurance contributions cap. Holding the cap is a positive step for the continued development of high value added jobs in a wide range of sectors, benefitting both international investors and Polish firms.

Another key area of ongoing engagement is addressing the lengthy process of employing specialists and executives from outside the European Union. For the market to truly grow into a global hub in advanced manufacturing, supply chains, R&D, financial services and other future focused areas, it is important

that Poland is seen as a pro-growth, cooperative market in this regard.

This edition of the Quarterly will acquaint you with the comments of Ambassador Georgette Mosbacher at our 2019 Annual General Meeting in December, as well as the 2020 economic outlook from fellow board member Sławomir Sikora from Citibank. AmCham ended 2019 on a strong note and we will continue this level of engagement and energy in the new year. Continued advocacy, AmCham diners at major economic forums, monthly meetings, dynamic committee schedules, B2B development opportunities, 30 under 30 and the American Investor Desk are all ahead of us in 2020.

The year 2020 marks thirty years of AmCham Poland. From a time when the founding members could comfortably sit at one small table until today with over 350 members, the organization has come a long way and had a considerable impact on the foreign investment and overall business environment in this great country. Recognizing the contribution so many have made to the organization, the best way to honor those efforts is to ensure that we move forward in the same spirit of free enterprise, focused on free, fair markets and continued prosperity.

With best regards,

TONY HOUSH
AMCHAM CHAIRMAN

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NEWSLINE

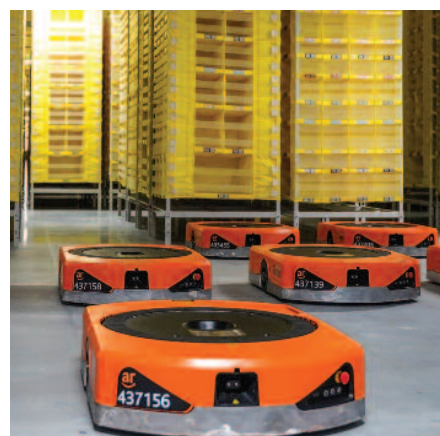
NEWS FROM AMCHAM AND ITS MEMBERS

AmCham



In December, the American Chamber of Commerce in Poland concluded 2019 with its Annual General Meeting of its members, with guest speakers George Mosbacher, US Ambassador to Poland, and Robert Nowicki, Undersecretary of State at the Ministry of Development; and over 150 AmCham members and friends. At the meeting, members approved unanimously by a quorum of voting members the Auditor's Report and the Annual Report. Citi and Citi-Handlowy sponsored the Christmas Reception that followed the meeting. The venue was the Warsaw Marriott Hotel.

Amazon Polska



Online retail platform Amazon said it will set up its new fulfillment and e-commerce center in Gliwice, Silesia. The center, comprising over 200,000 square meters, will be equipped with logistics technology to move items, Amazon Robotics which will comprise 3,900 robots (in picture). With the center Amazon will create over 1,000 new jobs. The company has already started recruiting staff to man its logistics, financial, HR, IT, and engineering departments.

ASB Poland

Business advisory ASB Poland announced it joined the International VAT Association. Thanks to the membership ASB Poland specialists on VAT will have access to information sharing between VAT experts in different global jurisdictions and to the European Commission to propose simplifications and procedural changes allowing members, their clients and business in general, to become more competitive and less constrained by administrative burdens.

CMS

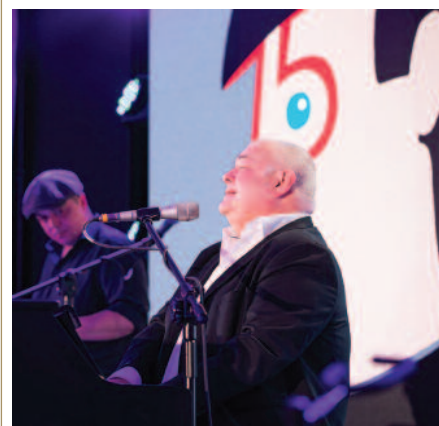
Law firm CMS advised in a transaction involving the acquisition of shares in Tarnobrzeg Municipal Water System (Tarnobrzskie Wodociągi) by the Local Government Investment Fund, operating under the auspices of the Polish Development Fund. The Local Government Investment Fund agreed to acquire 45 percent of shares in Tarnobrzskie Wodociągi. The money from the sale will be used for the further development of the water system in Tarnobrzeg. The Polish Development Fund is a state-owned financial group, which offers instruments supporting the development of companies, local governments and individuals, and invests in sustainable social development and national infrastructure.

Cushman & Wakefield

Commercial real estate agency Cushman and Wakefield won the title of the Best Commercial Real Estate Agency of 2019 at CIJ Awards organized by Roberts Publishing Media Group, the publisher of CIJ. CIJ, which held its first edition in 2002, is the longest-running commercial property awards event in Poland. During its 18th gala, which was held at Raffles Europejski in Warsaw, real estate advisory firm Cushman & Wakefield won the award for its outstanding achievements and operational growth in Poland.

C&W assisted logistics operator Panattoni Europe on the acquisition of land for Panattoni Park Częstochowa which will be delivered to the market in February 2020. The park is designed as an A-class complex of two buildings totalling 30,400 square meters. Apart from logistic space the complex will feature modern office units and ample parking space and truck courts. The complex will be BREEAM-certified with a GOOD rating. In other news, C&W was the Agency of the Decade in the jubilee 10th edition of the Eurobuild Awards, held in December in Warsaw. The Eurobuild Awards honor real estate advisory firms and developers for their professionalism and high business standards.

DeBenedetti Majewski Szczęśniak



In November, law firm DeBenedetti Majewski Szczęśniak celebrated 15 years in business. The gala, which took place in the Ufficio Primo—a decommissioned government nuclear bomb shelter in Warsaw—attracted more than 150 guests, including the law firm's clients, associates, employees, and friends. A Thanksgiving dinner was served, after the official dinner. The guests also enjoyed a film on DMS and a great recital by legendary jazzman Stanislaw Soyka (pictured).

DLA Piper

Law firm DLA Piper advised Resource Partners on the acquisition of a majority stake in Maced, a family-owned company based in Polanów, and one of the largest producers of dog treats and snacks in Europe with more than 20 years on the market. The transaction included the sale of a majority stake by the existing owners of the company and the capitalisation of the company by the fund through an increase in its share capital. Resource Partners, a group of funds, is one of the most active private equity investors in Central and Eastern Europe, specializing in consumer products and services.

ManpowerGroup

Human relations specialist ManpowerGroup published the Q1 2020 Employment Outlook Survey, which signals that Polish employers will continue to hire new personnel at a moderate rate, with industries signalling the highest rate of hiring being construction, manufacturing, electricity, water and gas supply, with employers in eastern Poland and the north-west anticipating the strongest hiring pace. Also, employers across the entire country expect to increase payrolls in the first quarter of 2020 in all 10 industry sectors.

AMERICAN CHAMBER OF COMMERCE IN POLAND

SINCE 1990

PIONEERS OF INVESTMENT IN POLAND

CREATING JOBS AND ECONOMIC GROWTH

LEADERS OF INNOVATION

SETTING BUSINESS STANDARDS

BRIDGING USA TO POLAND



AGENDA

INTELLIGENCE FROM AMCHAM COMMITTEES

DIGITAL ECONOMY

Robert Kośła, Director of the Cybersecurity Department at the Ministry of Digital Affairs, met the Digital Economy Committee in December, to talk about government plans to build a comprehensive system for securing the safety of the internet in Poland.

Kośła said that in drafting its regulations governing information network security Poland followed the European Network and Information Security Directive, but did not simply transpose the regulatory solutions from the directive but invented its own that embraces the specific conditions of internet infrastructure in Poland. The Act on National Cyber Security System was introduced in 2018, and it established the grounds for public-private partnerships in cyber security.

Kośła said that the act established three state-controlled centers managing computer emergency teams and allocated their responsibilities. One team was established under the Internal Security Agency to cover the government administration and government critical infrastructure. Another team was established under the Ministry of Defense. It is in charge of supervising the security of info networks which belong to the Polish military and hospitals for military personnel.

The third national cyber security team is managed by the National Academic Computer Network, or NASK, which answers to the Minister of Digital Affairs. Apart from providing services to the academic computer network and the Polish national scientific network, the NASK team covers local governments and all other state-owned and private networks (such as hospitals, banks) which are not covered by the Ministry of Defense and the Internal Security Agency.

In his presentation, Kośła also talked about government plans for building a comprehensive security service for all information networks in Poland, which would utilize the formula of public-private partnership. He said that the main government goal is to build an efficient sharing system on cyber threats and the structure of responsibility and management regarding performing cyber threat assessment. Also in December the committee met Magdalena Borowik, Plenipotentiary of the Minister of Digital Affairs and Advisor for Polish Financial Supervision Authority (KNF), to discuss potential regulations for new technologies such as blockchains and artificial intelligence. Borowik said that the problem that lawmakers face is how to define decentralization for those technologies which in fact are autonomous. Blockchains may be viewed as an independent database while AI is a technology that executes itself without any external control. Before moving on to the question-and-answer part of the meeting, the

guest added that while preparing the draft law on FinTech, the Ministry of Digitization plans to consult the representatives of the financial market to diagnose any problems involved with the decentralization of their services.

HUMAN RELATIONS

In November, the HR Committee met to discuss the problems of talent shortages, with Kamil Bułakowski and Agnieszka Stefanowicz-Barańska from Dentons law firm, who talked about why companies agree not to hire people from their competition through the so-called non-poaching agreements. She said that for many years now employers have been facing the issue of work efficiency and try to keep their workers' salaries low. On the other hand, growing market consolidation makes employees fear that their salaries are not rising high enough.

Stefanowicz-Barańska gave a historic overview of the problem of job cartels in the US and how the market regulator reacted, and updated participants on how the problem looks in the EU, noting that while this issue is regulated at a national level of each EU member state, a more universal law preventing job cartels may become reality for all EU countries. A discussion followed on how such regulations will effect the labor market across the EU and to what extent it will be relevant in addressing the problems on the labor market in Poland.

Also in November the committee met to discuss strategies for building and maintaining a skilled workforce, with speakers Jolanta Jaworska, Government & Regulatory Affairs Manager IBM Poland & Baltics & Ukraine, AmCham Vice-Chair and Ms. Iwona Choinska, IBM HR Leader, Poland & Baltics. The speakers defined the skills that are critical for successful innovation and how the innovative technology sector collaborates with educational institutions to ensure that future professionals are equipped with meaningful soft skills and capabilities to innovate and think outside of the box. The techniques that help professionals release negative emotions that accumulate throughout their work were on the agenda of the HR Committee meeting in December with speaker Iwona Piwowar, Country Leader of Assessment Systems Poland, who polled the meeting's participants on the symptoms of professional burnout and advised them on how to release their negative emotions. In her presentation, Piwowar, showcased some techniques that prevent the accumulation of negative emotions and talked about the consequences of letting them accumulate for too long.

INDUSTRY & ENERGY

Filip Schittecatte, Senior Energy Advisor Corporate Strategy & Planning, ExxonMobil, and Armando Benavides, Lead Country Manager Poland of ExxonMobil

met the Industry and Energy committee to present the main finding of a report, called The Perspective of Energy Landscape 2040, which was originally prepared for ExxonMobil headquarters to make the managers aware of trends in their investment decisions and strategic choices. But the report's significance surpassed the energy sector alone, and ExxonMobil decided to share it with other stakeholders. The report takes into account likely combinations of various aspects of energy production and consumption and offers several scenarios, each one balancing three components: the consumer and consumer demand for energy, policy makers and future regulations governing energy production and consumption; and technology, including how the learning curves in certain technologies evolve over time. Among the conclusions was that by 2040 some 13 percent of all automotive vehicles globally will have to be powered by biofuels, such as hydrogen and natural gas, thus replacing vehicles with the internal combustion engine. And this will become reality only when the efficiency of gasoline engines will grow by 2040 at the double rate of their efficiency growth measured for the last two decades.

MARKETING

Nathaniel Espino, Algate Strategy Group, met the Marketing Committee to talk about cross-cultural communications between Americans and Poles. The presentation aimed at helping Polish business people improve their understanding of their American partners across such specifics as the diversity of America's culture, and how Americans deal with time management and why coming late to meetings is viewed as rude, and other important cultural differences between American and Polish cultures. Espino explained why Americans talk openly about money but are cautious to talk about gender and race. In his presentation Espino offered advice to Poles on the best choice of subjects for social talk with American partners, and how to best apply numbers in messages to Americans so the numbers carry the intended message in a simple and persuasive way.

TAX AND FINANCIAL SERVICES

In November, the committee hosted tax experts from PwC, Marcin Jaworski, Senior Tax Manager, and Mr. Paweł Stec, Tax & Legal Services Manager, and licensed tax advisor, who talked about issues facing taxpayers preparing the CIT calculation for FY19 and presented major changes that will be implemented in 2020.

FOCUS

AMCHAM CHARITY DRIVE 2019

TIME FOR SHARING

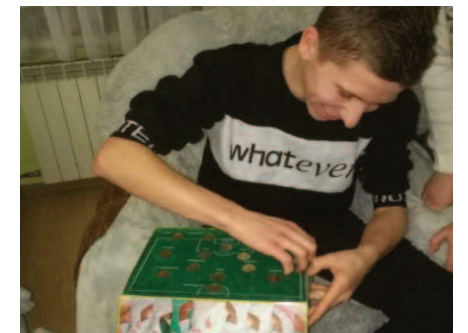
AMCHAM RALLIES BEHIND ITS MEMBERS IN SUPPORTING CHARITABLE CAUSES FOR UNDER-PRIVILEGED CHILDREN



AmCham's Marzena Drela and Anita Kowalska accompany a Universal Express operator during the 2019 AmCham Charity Drive



AmCham individual members donated food, clothing, toys, and cosmetics



A boy from the Bochnia orphanage unpacks his gift.

For the 24th consecutive year, AmCham held its Christmas Charity Drive to help children from 10 orphanages across the country, and a single Mother's Shelter in Słomczyn. AmCham member companies donated products and provided Christmas presents for children in need, while individual members donated food, clothing, toys, and cosmetics.

AmCham was extremely grateful to Procter & Gamble and Amway, two member companies which donated large amounts of laundry detergent, toothpaste, and other personal care items, all of which were extremely needed by the organizations AmCham is supporting. Among other large donors

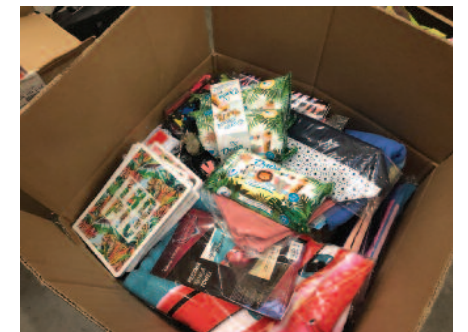
was Mattel, which delivered plenty of toys and gadgets for the youngest. A part of Mattel's donation was transferred to the Ronald McDonald Foundation which supports the patients of the Children's Clinic at Żwirki and Wigury street in Warsaw. Pramerica donated personal gifts-sets of cosmetics for all children from the Bochnia orphanage, and ABC Czepczyński delivered books and stationary for the children of the Rzeszów orphanage, just in time for St. Nicholas' Day. Warm thanks go to the employees of Fedex and Moneygram Poland, who delivered large quantities of food, clothes and toiletries for those in need. So did Walt Disney, for which AmCham is grateful.



Procter & Gamble and Amway were two member companies which donated large amounts of laundry detergent, toothpaste, and other personal items



Universal Express let AmCham use its warehouse space and boxes



Pramerica donated personal gifts-sets of cosmetics for all children of the Bochnia orphanage

COVER STORY

Innovation-based economy

A HOLISTIC APPROACH

GOOD INDIVIDUAL LAWS ARE AS IMPORTANT FOR BUSINESS AS THE STABILITY AND PREDICTABILITY OF THE ENTIRE LEGAL FRAMEWORK

In its nearly 30 years in Poland, AmCham has been constantly advocating a need for a multifaceted approach to changing the legal framework because this would boost the innovativeness of the Polish economy. Lawmakers focused mainly on offering higher tax deductions to companies engaged in R&D and it was not enough. There were other regulatory areas, critical for innovative companies that needed improvement. It was not until some six years ago that some regulations were introduced which supported the development of an innovation-based economy by offering not only tax incentives for technological startup and companies involved in R&D, which are attractive for both small and big enterprises, but also created an entire legal environment dedicated to nurturing innovation.

In recent years, a pivotal part in this process has been played by the Innovation Council, a consulting body established by prime minister Mateusz Morawiecki at the Ministry of Entrepreneurship and Technology, which brought under one roof the representatives of business (including AmCham), science, public administration and government officials representing the Ministry of Finance and the Ministry of Science and Higher Education. The council brought to fruition many legislative ideas that give an edge to innovative companies both big and small. Some of the regulations were included in the Second Polish Act on Innovation, which became law in 2018; others in stand-alone acts which became law in 2019 or will become law this year. All those reforms came into being thorough intensive, in-depth and long-lasting consultations between government experts and experts representing the investor community. Such an approach, unlike in the past, allowed for precisely defining the needs of the business sector, and designing legal solutions that matched those needs in every aspect. According to Marta Pawlak, Head of Legal & Public Policy at AmCham, who represented the organization at the Innovation Council, the lawmaking process that the government adopted "expressed an innovative approach to making laws to support the development of innovation."

According to Jolanta Jaworska, Government and Regulatory Affairs Director at IBM Poland & Baltics & Ukraine, the two Innovation Acts, of 2017 and 2018, sponsored by the Ministry of Science and Higher Education, introduced a range of incentives for conducting R&D and making innovative products and services in Poland that, in the aggregate, offer similar level of incentives as other EU countries, and in some areas even surpass them.

STEPS IN THE RIGHT DIRECTION

Tax reliefs are a well-known tool with which governments stimulate innovative companies to grow, and Poland is no exception in this respect. The first Innovation Act, which preceded the one introduced in 2018, did have a tax relief for the cost of R&D executed by companies, but it reached only 30 percent of all costs associated with R&D. The 2018 act upped the relief to 100 percent and it turns out that over 1,000 companies used it in 2018-2019. Another tool for spurring the creation of an innovative economy is the so-called IP Box. It is a set of investor incentives for companies which are based in Poland and have patented or are on their way to patenting and commercializing innovative products or services in Poland. Among the incen-

tives is a 5 percent tax relief on corporate income tax. IP Box is a solution which has been present in other countries worldwide for some time. In Poland it has been on the books since 2019, and there is no reason not to believe that it will not positively impact the development of an innovation-based economy. "It is a strong incentive and motivator for the companies to locate their R&D in Poland and puts our country in the competitive position," Jaworska said. Another pro-startup reform was the creation of a new form of stock company—the Simple Stock Company. It will come into the law from March this year. The SSC is a stock company dedicated to startups. It allows the use of a simplified procedure for setting up a stock company, and resolving it in a similar simple fashion. Critics of SSC argue that it does not have good enough supervisory mechanisms and poses threats to investors. Yet the representatives of business argue that without the SSC many investors tend to move to other countries where they find it much easier to establish their startups. And their voice prevailed. AmCham's Pawlak noted that the work on the SSC was a perfect example of a grassroots initiative that has been delivered to the government and which received a very professional treatment from the Ministry of Entrepreneurship and Technology, which assigned its experts to consult with business at every step of drafting the SSC bill. "The whole process lasted for years and there was not a moment in which either side would try to improvise and push to rush the drafting to the next level," Pawlak said, adding that "Every step was accomplished in a very professional, subject-matter way".

PUBLIC SECTOR OPEN TO INNOVATIVE BIDDERS

The new Public Procurement Act, which was signed by President Andrzej Duda in October 2019 and will become law at the beginning of 2021, has special provisions, dubbed "innovation partnership", designed for innovative companies to take part in bidding for business from the public sector. Innovative products and services deliver value, which is hard to be weighted in terms of the "lower price" principle and is much better defined by such criteria as efficiency, quality of service, speedy delivery, and how particular solutions will impact the given market. In other words, with the new Public Procurement Act, the public sector has a tool with which to award business to bidders with the most innovative solutions which are not necessarily the cheapest. "That sets a good direction for cooperation between the public and private sectors in Poland," said Pawlak. "The value of innovative services to the public sector are hard to estimate, unlike, for instance, a construction of a new sidewalk. Innovative solutions in IT and artificial intelligence can deliver great value for the public sector, but it is hard to measure it at the time of awarding business," she explained. Other business-friendly provisions in the new Pub-

lic Procurement Act aim at cutting the paperwork that bidders are required to submit and replace paper with electronic tools that guarantee fast and transparent processing. While this is not exclusively a Polish idea but one decreed by the European Union, Pawlak noted that by implementing all the best solutions in the Public Procurement Act the government in fact opened up the public procurement market to innovative companies. Pawlak speaks from experience as she was a member of a working group which collaborated with experts from the Ministry of Entrepreneurship and Technology in laying out the basic assumptions of the new bill and later, in developing the concrete solutions put forth by the ministry.

SYNERGIES

The new changes in the regulatory landscape in Poland are meant to help, first of all, small technology companies, and the Simple Stock Company is the best example of this postulate. Yet, while startups are universally associated with small technology companies the solutions developed by the government can be utilized by all types of companies, from small to medium-sized to big corporations. Pawlak, who represented AmCham in public consultations with the government during the legislative process leading to the creation of the IP Box, noted that the largest beneficiaries of this solution will be big companies because the scale on which they do R&D is much larger than that of small and medium-sized companies.

Another reason why big technology companies should be happy with the regulatory changes is that many of them collaborate with small technology startups through business acceleration schemes and hubs, and eventually benefit from the solutions developed by the small firms. The easier it is for the small ones to do their business, the better for their big mentors and partners. Another important reform, aiming to make the Polish economy innovation-based, has come from the Ministry of Science and Higher Education, which last year introduced the so-called "Constitution for Science". It is a set of regulations that introduces mechanisms which allow for closer cooperation between academia and business in defining study curriculum, launching joint innovative projects and R&D. One of its provision is the introduction of the "implementer PhD" which allows individuals conducting R&D in their own companies or companies that employ them, to use it as part of their PhD dissertation. "It is a good solution which sets up a new platform for cooperation between the private sector and academia and introduces the experience in the commercial sector into the academic sphere," said Jaworska.

MORE COHERENCY, PLEASE!

While all the newly introduced regulations that effect the innovative and R&D sectors have been welcomed by the IT and high-tech sector, there

has been other regulatory work that is much less appreciated by the business community in Poland. One example is the limit on social security premiums paid by the highest earners. In Poland, the fee is calculated as a percentage on the total amount of wages earned by employees. In light of the existing regulations, wage earners who make over 30 times the average wage calculated for the national economy do not have to pay fees on those parts of their wages that are above the 30-times threshold. Last year it was set at PLN 142,000 gross. But the government tabled a motion in parliament to get rid of the threshold, and tried to do it without any consultations with the stakeholders. It was bad news for a range of industries. It turns out that the IT sector, which for years has been struggling with shortages of talent, could be badly hit by the new regulation. This could result in moving some projects in the IT sector to other tax regimes outside of Poland.

According to IBM's Jolanta Jaworska, if the government aims to change the regulatory framework in such a way that it stimulates the development of the innovative economy, it should do it in close consultation with business and employees representatives. "The stability of law is a fundamental thing for business," Jaworska said, adding that, arguably, the government would not have done it had it consulted stakeholders in the IT sector. "Among the criteria that investors take into account before they decide where to allocate their new project is the availability of qualified personnel. If there are regulations that negatively impact qualified personnel and the competitiveness of the Polish economy, this may limit the number of new investment projects in IT in Poland," Jaworska said.

CUTTING THE RED TAPE

Another pressing issue that needs to be addressed sooner rather than later is the time-consuming and complex red tape in the way of obtaining work permits for foreigners who are non EU citizens. Facing a shortage of adequate talent in Poland, IT companies have been resorting to foreigners, especially well-educated and highly qualified managers and software engineers. Many of them come from Ukraine. Last year business professional services averaged some 14 percent of people who work with new projects were foreigners, a 4 percent rise compared to the 2018 numbers. And last year it took between 6-12 months to process all the administrative requirements to obtain a work permit for one person in the IT sector. It seems that it is way too long as far as investors are concerned, and, according to Jaworska, it discouraged some investors from starting new project in IT in Poland.

MONTHLY MEETING

NOVEMBER

STRENGTHENING TIES

POLAND-US RELATIONS ARE A STABILIZING ANCHOR IN THE CHANGING LANDSCAPE OF THE GLOBAL ECONOMY

In November, AmCham members met to discuss the economic and political challenges ahead in 2020 and beyond. The speakers were Bogusław Waleć Winid, Advisor to President Andrzej Duda on Foreign Policy and National Security; Michał Kobosko, Director of Poland Office at the Atlantic Council where he serves as Senior Advisor; Marek Matraszek, Co-Founder and Chairman of CEC Government Relations, the first lobbying firm in Central and Eastern Europe; and Marcin Petrykowski, Managing Director at S&P Global Ratings.

POLAND AND THE US

According to Bogusław Winid, 2016-19 marks a period of the most intensive political relations between Poland and the US, involving both Presidents, and a number of top government officials on both sides. The relations produced "very concrete results for a number of cooperation areas", including the US Visa Waiver Program, to which Poland was included in October last year. Poland-US cooperation in defense "is a model one" Winid said, pointing to the 5,000 US troops in Poland in Radzikowo near Słupsk, Żagań, Jarosławiec, Elbląg, Szczecin, Bydgoszcz, Poznań, Drawsko Pomorskie, Wrocław, Łask, Powicz, and Lubliniec. Winid underlined that the deployment of US troops in Poland "has been done in sync with NATO standards, rules and procedures which means the the US troops in Poland are well-based in the entire NATO defence structure and serve as

parts of the whole system to improve, upgrade and develop defence capacity of the so-called eastern flank of NATO."

Another area which is extremely important for the Polish President is energy security. The Polish side is ready to sign contracts with the US covering approximately 9.5 billion cubic meters of LNG, and "it looks like we will be soon totally diversified for energy supply which will be good for the Polish economy given there will be no energy crisis and energy price hikes in the foreseeable future," Winid said. Another initiative of the Polish president with international impacts is the Three Seas Initiative, which involves a number of countries in the region, from the Baltic States in the north and to Croatia and Romania in the south. Under the initiative the countries plan to build infrastructure networks for transportation, power systems, and others. The projects offer business opportunities for US companies as well. Winid said that the whole concept is being discussed and several projects have materialized so far. "When the new European Commission is established in Brussels we will have plans to show," Winid said.

Michał Kobosko noted that the role of the US in developing Poland's economy and homeland security over the last 30 years can hardly be overestimated. Today, cooperation between Poland and the US has reached an unprecedented intensity including the energy sector and the provision of LGN from the US as well as nuclear technology, which,

is clearly a necessity for Poland as its outdated power generation system is reaching its limits. However, Kobosko noted that the Polish government should make more efforts to reach Democratic senators on Capitol Hill, "to build the understanding between Poland and the US, to ensure the sustainability of our relations," Kobosko said. He added that US-Poland cooperation should keep growing without conflicting other parties, such as Brussels, Berlin, Paris, "and other important Poland's partners, who are crucial to a successful future of Poland," Kobosko said. Kobosko also noted that Poland is a young democracy and faces some issues regarding the sustainability of democracy including democratic institutions and principles. "We are talking about independent courts of law, independent media, the free enterprise," Kobosko said adding that those institutions represent fundamental democratic values for the US as well. "We discuss those issues with our US friends and colleagues, and we need to encourage the US to support and promote them in Poland," Kobosko said, noting that the US should continue its efforts to be pro-active in Poland and work closely with the Polish government.

GLOBAL ECONOMY IMPACTS

Looking at the economic challenges that Poland will face in 2020 and beyond, Marcin Petrykowski said that what lies ahead is an economic slow-

down but not yet a crisis. However, the slowdown will not be felt by all countries equally. Technically speaking, Germany, South Korea and a few more countries are in recession already, while countries like the US and China, which are less open to the world economy and more driven by internal consumption, are booming. Those two countries, plus India, are strongly contributing to the global economic growth, with China alone generating 50 percent of it. The Eurozone countries lag behind the US, China and India in terms of GDP growth. This situation will lead to a power struggle between the US, the Eurozone group of countries, and China, which will shape the future of the world. The contest will be a challenge for the Eurozone countries, as they will have to find their way in this situation. The lack of a banking union across Europe is one of the problems. The Eurozone countries will need to speed up the process of creating a banking union because if they fail they will find it difficult to compete with China and the US when it comes to capital markets. More so as the UK leaves the EU, the EU's financial center, London, will have to be replaced. Another issue is that the EU will have to redefine its economic model. It has been driven by austerity—generating savings rather than spending was the goal—and, as Petrykowski put it, "that growth model needs to be changed".

CHALLENGES FOR POLAND

When it comes to the Polish economy, it generated GDP growth of 4.3 percent, mainly thanks to the fact that Polish exports became more diversified outside of the Eurozone, which is a key strength of Polish enterprises. Also, the service sector in Poland has increased its contribution to the economy, which is a significant development as the country's economy used to be driven by industrial output and manufacturing. However, as the services sector is increasing its contribution to economic growth Poland is following the UK and French economic model, which is

contrary to that of Germany.

On the risk side, Petrykowski noted that Poland will not be immune to the softening of the economy of the Eurozone countries. With this there may surface such problems as a lack of investment in increasing work efficiency and productivity. Historically, Polish companies preferred to increase their output potential by hiring more people rather than increasing the productivity of the existing labor force by adopting Industry 4.0 solutions, as other countries did many years ago. This time, however, hiring new people will be difficult because Poland's demographics—Poland is definitely and aging society—and recent government reforms lowered the retirement age, which was "completely contrary to what growth-oriented economies require," Petrykowski said. Another risk to the Polish economy is the increasing role of state enterprises in the economy, most particularly in the banking sector. "In a long-term perspective it may become an issue in terms of profitability and business efficiency, but also in terms of the potential control of lending policies and other economic frameworks," Petrykowski said.

He concluded his forecast by saying that one should not take for granted that Poland will be able to weather the economic storm around it, because any policy, however proper and right, will wear off in time. So the problem is that Poland needs to reform its economy so it will maintain a relatively high economic growth of about 4 percent GDP in the years to come.

FOUR SHADES OF BREXIT

Among the big political and economic challenges that Poland will have to face in 2020 and beyond are the ones caused by Brexit. According to Marek Matraszek, when the UK leaves the EU, both parties will have to negotiate a future relationship, and this is where Poland will have a lot to say. On the agenda will be requirements on the UK such as state aid, environmental rules, worker rights, and

others, which will have a significant impact on how competitive the UK economy will be vis-a-vis that of the European Union. And the question is what kind of a country Poland wants to have just offshore of the EU—a country which is much more aligned to EU rules on environment and state aid, or a country which will be much more competitive economically than the EU. "That will be the first crucial impact of Brexit," Matraszek said. The second crucial impact of Brexit is the loss of the UK in shaping key policy issues in the EU. "Over the years the UK was very favorable to the Polish position on a number of issues—energy, Russia, services, single market, agricultura policy and many other areas," Matraszek said, explaining that Poland and the the UK had a common vision, much more pro free-market, than other big players in the EU, such as France and Germany. Without the UK in the EU decision-making basket, Poland simply will have to find other countries to support its proposed pro-free-market policies.

The third area where Brexit will impact Poland is that it will make Poland a much more important EU member in the eyes of France and Germany, in the battle of the future shape of the EU, which is whether the EU should be much more concentric on the Eurozone, of which Poland is not a part. "Poland will have a role of a swing actor in future discussions of the shape of the EU between Germany and France," Matraszek said. The fourth impact of Brexit on Poland will be the start of a Poland-UK relationship at a bilateral level and this relationship will swing to those areas, where Poland and the UK think in similar terms. According to Matraszek "We will see an increase in interest by the UK government to build a defense relationship with Poland both in the NATO framework and bilateral framework as well as defense industry cooperation, which is also good for the US defense agenda."



MICHAŁ KOBOSKO

In 2013 he was appointed Director of Poland Office at the Atlantic Council where he serves as Senior Advisor. Kobosko worked as journalist and media manager. He gained his professional experience in the 1990s while working for *Gazeta Wyborcza*, later as a Deputy Editor-in-Chief of *Puls Biznesu*. He was Editor-in-Chief of *Newsweek Polska*, and in 2009 he was responsible for an editorial merger of *Dziennik Polska-Europa-Świat* with *Gazeta Prawna* and became the first Editor-in-Chief of the *Dziennik Gazeta Prawna*. In 2011 he joined Platforma Mediowa Point-Group, for whom he negotiated with Bloomberg which led to the launch of *Bloomberg Businessweek Polska*. Later he became the editor-in-chief of *Wprost* newsweekly, a position he held until January 2013. He joined Axel Springer group in 2014 as Editor-in-Chief of a newly introduced Polish edition of *Forbes*.



MAREK MATRASZEK

Co-Founder and Chairman of CEC Government Relations, the first lobbying firm in Central and Eastern Europe. Matraszek moved to Poland in 1990 and worked closely with the British Conservative Party and the US Republican Party in assisting their activities in Central Europe. In 1992 he was appointed to represent the Margaret Thatcher Foundation in the region. He co-established CEC in the early 1990s, and is now the leading public affairs and political communications agency in Poland. Matraszek studied at Magdalen College, Oxford, where he graduated in Philosophy, Politics and Economics in 1984, and in 1987, earned a Master's degree in Russian and East European Studies.



MARCIN PETRYKOWSKI

Managing Director at S&P Global Ratings, and, since 2016, member of the Supervisory Board/Non Executive of MCI Capital, private equity firm investing in the digital economy across Emerging Europe. Before joining S&P Petrykowski worked as Executive Director at J.P. Morgan Corporate and Investment Bank in London, where he covered Russia, CIS, CEE, and Israel for Markets and Investor Services. He was also the Deputy General Manager for J.P. Morgan CIB in Poland. Prior to 2007 spent five years with Citi Corporate and Investment Banking, operating in Poland and CEE.



BOGUSŁAW WALEŃTY WINID

Since 2018 advisor to President Andrzej Duda on Foreign Policy and National Security. Winid is a professional diplomat. He has a PhD in humanities. From 2006 to 2007, he served as the Undersecretary of State in the Ministry of National Defense, and from 2007 to 2011 he held the the post of an Ambassador of the Republic of Poland to NATO. From 2011 to 2014 Undersecretary of State in the Ministry Foreign Affairs, from 2014 to 2017, the Ambassador of the Republic of Poland to the United Nations.

ANNUAL GENERAL MEETING

WRAPPING UP 2019

AMCHAM HAS HELPED BUILD SOLID FOUNDATIONS FOR FUTURE ECONOMIC AND POLITICAL US-POLAND PARTNERSHIP

In December, AmCham held the general annual meeting of its members, who, through voting, accepted the 2019 Annual Report and voted in some changes to the organization's status. But beside the technical part, the meeting was a warm celebration of yet another good year in US-Poland economic relations with keynote speakers Georgette Mosbacher, US Ambassador to Poland (and AmCham Honorary Chair), Robert Nowicki, Under Secretary of State at the Ministry of Development, and Sławomir S. Sikora, CEO of Citi Handlowy (and AmCham Board Member).

THE AMBASSADOR'S VIEW

In her address to the chamber, Ambassador Mosbacher said that the most significant milestone in 2019 was Poland's inclusion in to the US Visa Waiver Program. "I want to thank AmCham in particular and everyone in this room, because you gave this effort your full support and it did make a difference," she said.

When it comes to energy security—another priority of the US government in its relations with Poland—the ambassador said, that "not only have we delivered, but we have exceeded in our most optimistic expectations". The LNG terminal in Poland is under expansion and Poland is on its way to becoming a regional hub for LNG distribution in Europe. "A number of US firms are supporting Poland's goal to be a regional energy supplier with its own, secure energy sources," the ambassador said,

Talking about nuclear energy, Ambassador Mosbacher noted that 10 US companies, together with US Department of Energy Assistant Secretary Theodore J. Garrish, had participated in a Polish-US Nuclear Industry Forum, hosted by the Polish government to talk about a Polish-US partnership in building nuclear energy in Poland. "It is a very exciting time for building the sector in Poland as there are a lot of activities along the way already, and Poland is squarely on the path to becoming energy independent," the ambassador said.

In turn, in defense, the Polish government is moving forward to procure the state-of-the-art F-35s from Lockheed Martin, which recently opened an office in Poland. "With this, US defense companies become long-term partners of the Polish military," Ambassador Mosbacher said. "Their presence in Poland opens another chapter of a long-term commitment to the regional safety and security of Poland."

She added that in September the US was a lead nation at the MSPL, one of the largest defense trade shows in Europe, held in Kielce, Poland. "We had an expansive US pavilion with more than 50 American firms and we welcomed several high-level officers from the Department of Defense. Our participation in the MSPL was not just symbolic. The US is proud to be Poland's leading partner in defense cooperation and its military modernization," the ambassador said. According to the ambassador, not only are American companies committed to the bilateral commercial relationship but the US government is right there alongside US companies, advocating for a more robust economic, scientific, and technological engagement in Poland. She noted that within the last 12 months, US and Poland had an unprecedented intensity of contacts between top government officials with additional numerous US Congressional delegations visiting Poland, "precisely because Poland is such an important ally and partner of the US," Ambassador Mosbacher said.

THE MINISTER'S VIEW

In his address to AmCham members, speaking on the behalf of Minister of Development Jadwiga Emilewicz, who could not attend the AmCham meeting this year, Undersecretary Nowicki underlined the width and depth of recent government reforms aimed at making Poland a better place for investors and business, by saying that the government had implemented the so-called Constitution for Business which, among its many provisions, dismantled the old-style special economic

zones, where investors could apply for incentives depending on the geographical location of the planned investment projects, and instead changed the whole area of the country into a special economic zone. This, the undersecretary said, would meet the expectations of foreign investors and "trigger them into investing here in Poland—one of the largest economies in the EU," Nowicki said.

The undersecretary said that the government is open to new investments based on the principle that economic growth should be based on R&D and innovation, because "it is what makes an economy competitive and sustainable". He added that "Poland needs to become a relevant place in the global economic value chain."

APPRECIATION FOR US AMBASSADOR

Undersecretary Nowicki thanked Ambassador Mosbacher for her support for the inclusion on Poland onto the US Visa Waiver Program. "You are a true friend of Poles and Poland," he said. Speaking on behalf of AmCham, Sławomir S. Sikora also expressed appreciation for Ambassador Georgette Mosbacher for the role she played in helping to strengthen the US-Poland relations by successfully closing the points of her agenda, she had set up 15 months earlier, when starting her diplomatic service in Poland. Referring to one of the points—the inclusion of Poland in the US Visa Waiver Program—Sikora said that Ambassador Mosbacher delivered on that in an exceptionally a short time! "It was only possible for someone with a talent for business," Sikora noted. "We know that delivering on promises is very important in business. So thank you very much!" Sikora also underlined the pivotal role Ambassador Mosbacher played in supporting American business in Poland and Polish businesses in the US. "Having witnessed your work for the last 15 months on duty in Poland I want to thank you for what you have done so far, and I am looking with optimism to the future," Sikora said.

AMCHAM'S GOOD WORK

All speakers underlined the importance of AmCham in helping the two nations to strengthen their economic and political bonds. Ambassador Mosbacher noted that 2019 was "a landmark year for US-Poland economic relations" because US businesses in Poland "made significant strides which have propelled our economic cooperation to new heights and in doing so we bolstered the bilateral partnership more broadly," adding that "none of our success would be possible without the advocacy and efforts from AmCham. Thank you for your sustained commitment!" In turn, Undersecretary Nowicki said that the government has always appreciated the role that AmCham played in "helping US companies grow their presence in the Polish economy", but he also pointed to the recently launched American Investor Desk—an AmCham program aiming to help Polish companies and investors expand in the US—by saying that the ministry welcomes this initiative because it is in sync with government policies to make the Polish economy more "international"—more export-oriented. Nowicki said that the US market is one with a lot of potential for Polish companies and added that in 2018 alone the value of Polish exports to the US grew by 19 percent. "It is a good initiative that AmCham decided to provide information and assistance not only to US companies in Poland but also Polish companies eyeing the US to scale up

and develop on the US market," Undersecretary Nowicki said. Sławomir S. Sikora, who as a Member of the AmCham Board of Directors, has known the organization inside out for many years, thanked its members for their involvement and support of the organization. He said that "When we deal with the government we do not ask for privileges but do ask for a level playing field. It is very important that in our dialogue with government agencies we get a level playing field." Talking specifically of the value AmCham brings to its members Sikora simply said that AmCham is "a very reliable partner in our discussions with the government" and a "terrific platform" for working between member companies.

CITI ECONOMIC OUTLOOK

Sławomir S. Sikora also shared his thoughts based on his unique position of being a leader in a company which was one of the US pioneering investors in Poland, entering the market in 1991. Over the years Citi created over 8,000 jobs in Poland, not only in Warsaw, but, thanks to its knowledge of the local economy, in other regional business capitals, such as Kraków, Wrocław, Poznań, Szczecin, Katowice, and the TriCity.

Citi, which remains the bank of choice for its international clients who come to Poland, also offers its clients in Poland an access to over 100 countries the world over. Because of that unique van-

tage point on the global economy, Sikora said that despite some economic risks, such as Brexit, the growing demand for creating environment-neutral business models, and the trade tensions between the two largest world economies, there are many positive economic indicators that bode well for 2020. "We are pleased to see that our Polish clients expand internationally," Sikora said. "It is true with some traditional industries investing in the US, but we also welcome the fast growth of software houses which are starting to invest in the US, leveraging their new technologies." Looking at the US economy, the biggest economy in the world, Sikora said that Citi sees "US consumers very happy and spending, and you can make a parallel to the Polish market, where the country's economy has been driven for many years by consumer optimism."

Sikora added that the equity market in the US, grew "25 percent year-on-year to date, which made all investors happy." This, coupled with data on the US labor market that showed a strengthening employment market in the US, paints a positive picture of the US economy for 2020.

A similarly positive picture can be seen for Poland, where, despite the forecast of an economic slowdown, the country's GDP growth is expected to reach 3.7 percent in this year. "A 3.7 percent GDP growth in Europe would be a great growth, and this is a good news for all of us doing business in Poland!" Sikora said.



GEORGETTE MOSBACHER

Appointed US Ambassador to Poland in summer 2018. She has been President of Georgette Mosbacher Enterprises, Inc., a business and marketing consulting company in New York City, since 1992. She served as CEO of Borghese Inc. from 2001 to 2015. In 2016 she was confirmed by the U.S. Senate as a Member of the United States Advisory Commission on Public Diplomacy. Mosbacher founded the New York Center for Children, which assists abused children and their families, and has served on the boards of numerous charities supporting veterans and their families. A fellow at the Foreign Policy Association, she is also a board member of Business Executives for National Security and the Atlantic Council. Previously served as a co-chair of the Republican National Committee's Finance Committee, and was the first woman to serve as the General Chairman of the Republican Governors Association. Ms. Mosbacher authored two motivational books for women. She earned a B.S. from Indiana University and is the recipient of many awards recognizing her humanitarian and entrepreneurial contributions.



ROBERT NOWICKI

Since December 2019, Under Secretary at the Ministry of Development. In his career Nowicki has dealt administrative law and international cooperation in public and private institutions. He has experience in the internationalization of universities, including programs and support instruments. An expert in program and project management, change and risk management. In 2016 he served at the Ministry of Economic Development, where he co-founded the Project Management Department. He is co-founder of the first government administration tool for managing and monitoring of programs and projects and co-organizer of the Innovation Forum at the Ministry of Entrepreneurship and Technology. He was also Deputy Director in the Department of Innovation of the Ministry of Entrepreneurship and Technology responsible for issues of industrial property and the national space policy.



SŁAWOMIR S. SIKORA

AmCham Board Member, Chief Executive Officer of Bank Handlowy S.A. in Warsaw since 2003. He has extensive board experience including present roles as a member of Supervisory Regulations Advisory Committee at The Polish Banks Association a Vice President of the Board of the Polish Confederation of Private Employers Lewiatan and member of the Emerging Markets Advisory Council at the Institute of International Finance in Washington D.C. In 2010 he was awarded by the President of the Republic of Poland with the Knight's Cross of the Order of Polonia Restituta. Sikora held a number of senior positions at the Poland's Ministry of Finance, including the Head of Banking and Financial Institutions (1989-1994) in which capacity he oversaw the government-run banking sector rehabilitation program in 1992-1994. Later he was appointed Head of Corporate and Investment Banking at Powszechny Bank Kredytowy and in 2001-2003 he was President of the Management Board of American Bank in Poland, and in 2005—2008 Sikora was Member of Citigroup Management Committee in New York.

FOCUS

AMERICAN INVESTOR CLUB

30 YEARS IN POLAND

STEP BY STEP

THE TIME IS RIGHT FOR POLISH FIRMS TO GO TO THE US

The US is becoming an increasingly popular market for Polish firms searching for new business opportunities. As a place to do business, America offers a predictable and transparent legal system and access to the world's most lucrative consumer market with a per capita disposable income of approximately USD 48,000 calculated for 2018, which is 9 times that of Poland's standing at USD 5,346 in the same time according to the US Bureau of Economic Analysis. More than 120 significant Polish investments in the US so far do not, in the aggregate, reflect the full engagement and the number of Polish companies involved in the US market. Hundreds of Polish firms

export goods and deliver IT and technology services from Poland to their customers in the US. Polish investments in the United States are getting bigger and are set to continue to grow. For many, the US is the natural next step following consistent growth on the domestic market, as well as foreign markets close to Poland. For others, the booming US economy has become a good alternative to European markets, where the visible economic slowdown is causing lower demand and lower levels of purchases of goods from Poland. Companies in all sectors, from furniture and machinery to food and cosmetics, to IT, are all ready to expand their busi-

nesses to the US.

FIRST THINGS FIRST

However, doing business in the US is not easy and before a Polish firm successfully settles and starts to grow on the American market, it needs to do its homework: gather the necessary resources, get access to information, data and key contacts as well as acquire the skills required to do business in the US. AmCham has been observing this trend for some time and after 30 years of focusing on American investors in Poland, AmCham's Board of Directors decided to lend a helping hand to Polish businesses. Over the past year,



Nathaniel Espino at the Meet-the-Expert Desk during Kongres 590 in Rzeszów



Peter Strupp runs a presentation for Polish companies, members of the American Investor Club.



A meeting of the American Investor Club



Ewa Mróz, American Investor Desk Manager with Janusz Januszkiewicz from Decerto and Andrew Hope from Apollo Capital, two companies which are members of the American Investor Club.

AmCham's American Investor Desk (AID) has become a platform for Polish companies to identify and discuss common interests and exchange information regarding their economic activities in the US. Foremost, however, by organizing dozens of seminars in Warsaw, Gdańsk, Katowice, Łódź, Poznań, Bydgoszcz and Rzeszów, with hundreds of participating companies, the AID has been a place to gain the knowledge and skills on how to do business on the vast, demanding and extremely competitive US market. The newly launched American Investor Club at AmCham allows Polish companies to get access to, and network with American firms. They can participate in regular experts' meetings to gain know-how and understanding on various topics, starting with legal and regulatory issues, through marketing and communication skills necessary to operate within the American business culture. The American Investor Club allows its members to take advantage of the forum to network and discuss issues of importance to the Polish business community in the US, and, in the future, to strengthen the "Made in Poland" brand.

AMBITIOUS PLANING

"The American market is so competitive and demanding and only the best-prepared companies can meet the high level of competition, high customer expectations, and regulatory requirements," said Ewa Mróz, AID Manager.



Patric Burke, EY, at the meeting of the American Investor Club.

WELCOME TO THE CLUB

The American Investor Club was officially launched in November 2019 and it welcomes, among its first members, the following companies:

Apollo Capital manages funds to invest in Polish operations on the US market. The company offers financial support in the form of capital investment as well as business services related to operating in the US, including legal assistance and accounting. Part of their offer is an office hub in Tampa, Florida.

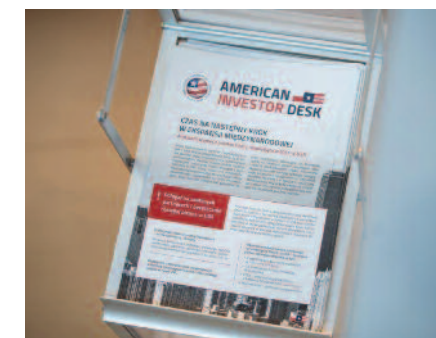
Decerto sp. z o.o. is an IT company based in Warsaw, operating since 2006 as a supplier of advanced IT systems for business. Their clients operate in insurance, finance, telecommunications, as well as other enterprises whose operating activity is based on large numbers of clients and data. Decerto already has clients in the US and aims to expand its operations there. Decerto knows that in order to be successful in the US market it has to be close to their clients, operate in the same time zone, be responsive, alert, and a few steps ahead of their clients' needs and expectations.

Fit Land, sp. z o.o., in business since 1996, produces organic FIT bars made of high-quality selected natural ingredients from certified organic farming. Fit Land is fairly advanced in introducing its products to the US market. Part of their market-entry strategy is e-commerce and extensive use of Amazon.



Rafał Wojciechowski, Elena Veneziani, UL International at an AID event for furniture manufacturers.

"Therefore, a huge part of the AIC activities is education. In 2020 we plan regular meetings with experts on a broad range of issues related to entering and growing on the US market. Special emphasis will be put on sales, which is always the key element of any business strategy and a major challenge for Polish firms confronted with the American business culture, which is so much different from the Polish or European. We will discuss other topics like industry-specific regulatory issues, logistics, IP rights and patents, commercial real estate, employing Americans, taxes and tariffs, e-commerce and selling through platforms such as eBay and Amazon." For AmCham, delivering high-level expertise and experience at doing business in the US is possible primarily thanks to the engagement of several AmCham members, such as, Century Link, Citi Handlowy, Nate Espino, EY, Google, Greenberg Traurig, Miller Canfield, Santander, Peter Strupp, TMF Group, UL International, and UPS. All these members have contributed greatly to creating a consistent and ongoing educational platform for Polish firms. "We look forward to working with other AmCham members, which have US market experience and are determined to share their knowledge and experience and therefore contribute to bringing Polish firms closer to the US market," Mróz said.



AID info materials distributed at AmCham events in 2019

FOCUS

CONSUMER TRENDS



GOING OUT IN STYLE

AS POLISH CONSUMERS BECOME MORE AFFLUENT THAN EVER THE FASHION MARKET MATURES

In December, the daily *Rzeczpospolita* reported that according to its sources two luxury brands, Dior and Chanel, plan to enter the Polish market and open boutiques in Warsaw. The two brands reportedly eyed the retail section of the Europejski Hotel, where already the French luxury brand Hermes has its boutique, alongside a number of Polish premium fashion brands. If the rumor materializes and Dior and Chanel land in the Europejski, Warsaw will have another hub of luxury fashion brands to supplement the offering of the boutiques on Moliera street and in the Metropolitan building on Piłsudskiego Square. The reason why there is demand for top-notch fashion brands in Poland is straight forward: the country is in its 30th consecutive year of economic growth, and with it grows the affluence of Polish society and demand for an ever-changing range of product categories. The trends were recently captured by KPMG, which in November released a report entitled

"The Fashion Market in Poland—The Challenges". The report examines consumer trends across three demographic groups: Generation X—those born before 1979, Generation Y—born between 1980-90, and Generation Z—born after 1990.

DIFFERENT ATTITUDES

Clothes are the most frequently bought fashion products out of all fashion items with one third of the sample indicating that they tried to buy a piece of clothing at least once every three months (79 percent of the sample) and among them 37 percent said they buy a new clothing product once a month.

Generation Z is the most inclined to buy new clothes with nearly half of the Generation Z sample saying they do so every month. Apart from buying clothes they are the most inclined towards buying additional fashion items such as accessories and gadgets, out of all the demographic categories. At the opposite end stands Gen-

eration X whose members appear to be the least fashion-oriented consumers.

When it comes to where the most of the money goes, all generations of Polish consumers spend the most of their fashion budgets on shoes and overcoats, and the least of their budgets on T-shirts and blouses.

Fashion retail chains, multi-brand internet stores and discount stores are the most popular places where Poles go shopping for fashion. While internet stores are popular with Generation Z, Generation X is the least focused on online shopping, preferring multi-brand bricks-and-mortar stores. They are also much less inclined as compared to Generation Z to buy second-hand items.

ALL ABOUT PRICE

Promotions and discounts are the main drivers for fashion buyers with 59 percent of the sample indicating so, while the need to buy "something new" was much less frequently signalled across

all other demographics. Product quality and positive interaction with products are also important but not so much as their price. Generation X tends to be the least loyal to brands, and also not so sensitive about the speed of product delivery. In turn, Generation Z shoppers appear to be the most focused on buying limited series products. They also are more loyal to brands, pay attention to the design of the products they buy and also use the recommendations of their peers as well as social media to help them make decisions on what to buy. At the opposite end are Generation X buyers. Instead of looking for what is trendy they pay most of their attention to aspects such as practicality and quality.

Despite all the differences, price seems to be most critical aspect for buyers in Poland. More than 70 percent of the sample in all demographic categories said that they buy products with prices that are well aligned to product quality, while "original design" was the top buying factor for only for 40 percent of the sample. Yet, Poles are strongly inclined to purchase Polish brands over foreign ones. For half of the sample across all ages (except for Generation Z), buying products made in Poland seems to be important and they are ready to pay more up to 10 percent on the regular price for goods, if they are made in Poland. Yet, on the other hand, the polling revealed that in their purchasing decisions Poles are driven primarily by discounts and rebates available through loyalty programs.

ONLINE EXPERIENCE

Internet fashion stores are viewed by Polish consumers as good places to start the shopping process. Poles look at internet stores to get inspiration what to buy and see what is trending. Those who know what products they are looking for use the internet to compare offers from different manufacturers and outlets and to compare prices. Younger consumers tend to use the online platform throughout the entire purchasing process and they are fine with client services executed online, including warranty issues and product returns.

Nearly 50 percent of the sample across all demographics said that they are willing to use online platforms to purchase products that they know. They are also willing to buy online products that they have never bought before but only if the products are offered at super-discount prices. In turn, generations X and Y view online shopping especially attractive because it offers cost-free product returns. Only 9 percent of the sample said they they would never buy online, no matter what products are available and for what prices. What drives consumers into using online shops is that they are available 24/7. Young consumers also appreciate the fact that online shops usually offer different products and brands compared to brick-and-mortar stores. They also indicated that with online shopping they can save time. On the other hand, however, having to wait too long for their purchases to be delivered in one of the

most negative experiences connected with buying online.

Innovative solutions that support online shopping are of lesser importance to all generations of shoppers. When it comes to clothing and footwear Generation X shoppers expressed definitely negative attitudes to buying online. It seems that for them the biggest obstacle to using online services is the inability to try the product on, which in turn, is the main pro for consumers who use bricks-and-mortar shops.

COOL SHOPPERS

The narratives and philosophies associated with products and brands do not seem to make a much of an impact on the purchasing decisions of Polish shoppers, as most of the sample said that they are not driven by emotions in this respect. However, Generation Z shoppers indicated that "brand philosophy" is important to them and that they are sensitive to the advertising they see in the traditional media as well social media and influencer profiles they see online.

RECYCLING AND ECOLOGY

If they no longer wear their clothes they are inclined to pass them on to those who may need them, said the majority of the sample—66 percent. Generation X reflected the highest degree

of the pro-social attitude, while 45 percent of the sample across all demographics said they pass their old clothes on to family members and friends. A relatively small portion of the sample said they throw away old clothes, while a small portion of Generation Z sample said they redesign old clothes to use them as new, which signals the beginning of the zero waste trend in fashion in Poland.

Pro-ecological policies and an environment-friendly business are important for 25 percent of the sample, who said that they were willing to pay up to 20 percent on the regular price if they could choose between eco-friendly and not eco-friendly clothes and footwear. About 47 percent of the sample also said that the environmental impact of the fashion industry may be limited by changing production methods, resorting to old collections when designing new ones, and using eco-friendly materials. Some 25 percent of the sample said, that producers should go eco-friendly even if it meant that fewer new collections will be available on the market each year. Yet, such pro-eco policies will not be appreciated by Generation Z who fear that it would disrupt the "fast fashion" trend.

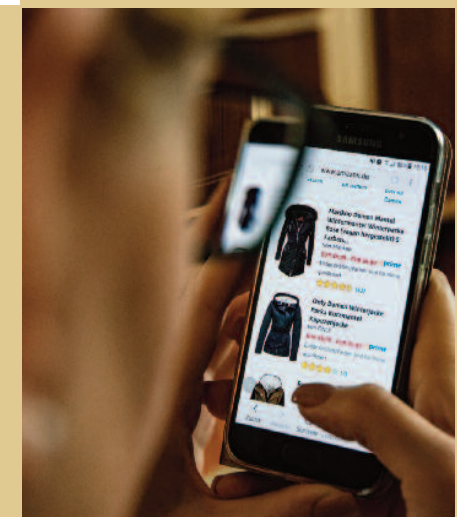


REAL-LIFE EXPERIENCE

There is a class of products that the majority of Poles, regardless of their age, never buy online. Those are products that require trying on, such as shoes and suits. Also, when it comes to super expensive fashion items, Poles tend to first see them in real life before making a decision on whether to buy them or not. Only 25 percent of the sample are driven to buy in bricks-and-mortar shops because they can have the products on the spot and do not need to wait for delivery.

SMARTPHONES VERSUS COMPUTERS

Polish consumers use smartphones and computers to search and compare products, collections, and prices rather than to purchase concrete things. They also use their devices to get inspiration on what to buy. Out of all the demographic groups, consumers aged 40+ are the least inclined to use a smartphone for that activity as they tend to stick to their good old laptops.



Company Profile The Bridge Wrocław MGallery

THE LUXURY FOR MIND AND BODY

AmCham.pl Quarterly editor Tom Ćwiok talks with **Timea Balzer**, General Manager of the Bridge Wrocław MGallery, about how the hotel fits into the region's cultural and historic environment and the unique experience it has in store for its guests.

What can you tell me about the hotel's brand? In what way does it differ from the competition?

MGallery Hotel Collection is an Accor Hotel brand selection of high-end hotels all around the world. Each of MGallery hotels has a unique personality and story that guests can experience through its architecture, interior design and services, and they comply with one of the three typical distinctive elements. The 'Heritage' origin hotels are in places filled with history; others re-

flect an aesthetic universe, a style; the "Signature" of a personality that contributed to their creation or decoration; still others promise a relaxing time, "Serenity" in a natural or urban retreat. Ostrów Tumski in Wrocław was once an island connected to the right bank of the Odra river by a bridge. The place is today the location of the Bridge Wrocław MGallery Hotel. This exceptional property became reality with the joint effort from the investor, Tacit Investment, who had

a brave vision, and the architects Forum Architekci and Medusa Group, as well as the city authorities. The Bridge is integrated into the the gothic surroundings of Plac Katedralny area and by contrast highlights the beauty of the cathedral. The Bridge Wrocław also links history with contemporary vibes where industrial design mingles with the past. The interiors are decorated

people may recharge their batteries after a busy day. A beautiful panorama of the city can be admired from the Bridge SPA on the 6th floor. Our guests can indulge themselves in a unique experience under the starry firmament on the hotel's rooftop, and savour champagne overlooking the mystical island and the city when it is falling asleep. This gift can be purchased to remind you



with large-format graphics of 19th-century Wrocław, reproductions of private collections as well as the National Museum.

What is the kind of experience that guests can come across at your hotel?

The Bridge Wrocław MGallery offers a unique experience to its guests in terms of services. The area of Ostrów Tumski is an integral part of Wrocław and it is considered an oasis of silence—a spot in which

of these precious times, it is a part of ritual called the Memorable Moment. Our six-metre-high Majestic Ballroom, with a spacious foyer, offers an area of 490 square meters where celebrations, conferences and weddings can be held. Natural daylight enriches the experience of this venue, as well as three other function rooms and a riverside setting accessible from the outside hotel garden bestows magnificence upon organised events.

I reckon that a significant part of the guest experience is generated by the hotel's staff. What can you tell us about this aspect of business at the Bridge?

Our hotel creates exceptional surroundings for team development that enhances the best customer experience. We strive to give time and attention to the guests and make the unique hotel experience for them. These connections cannot be based on standardised activities and as none of the guests and none of the team members are identical. It is important that we welcome the guests as if they were coming home and it is also important that our team feels good throughout their day.

The hotel industry is changing to

such as "do-not-disturb" and "please clean" at the guests' fingertips. There are LED screens with information on room status and the doorbell outside the rooms. The ballroom sound system is Dolby Surround and all conference rooms are equipped with panels to control light, air-condition, sound and multimedia equipment.

How do you find the right candidates for new jobs at the hotel?

We are looking for passionate and professional individuals whom we can help to grow and who can become appreciated and valuable team members. The recruitment process involves a few stages, from meeting department heads to the general manager. We encourage our colleagues to recommend new candidates. It is also important to mention that we are keen to grow our team and consider promotions internally as much as possible. We are eager to find new students who are willing to join us and learn, and we are also interested in cooperating with schools of different faculties which are interested in our activities.

In what way do you find Wrocław a specific tourist destination in comparison with other big tourist cities in Poland?

Wrocław is a wonderful city of rich history and exceptional architectural and natural beauty, appreciated both by its residents and its guests. I come from Budapest, and I find many similarities, especially the open and vibrant atmosphere of the two cities. Wrocław is a dynamic centre of culture. Numerous theatres, the Opera, a concert hall, museums and galleries offer a rich program of artistic events. Various music and film festivals of international renown have become the city's trademarks. I feel at home in Wrocław and I encourage everyone to spend more time in the city than just one or two days.

Do you think that the city authorities do a good job promoting Wrocław as a tourist destination across the country and internationally?

With the commitment of the city authorities, residents, local enthusiasts and visitors from Poland and

abroad, Wrocław now boasts the title of the best European destination of 2018. European Best Destination is a Brussels-based international organisation with a focus on promoting culture and tourism in Europe. Wrocław was able to carry it off with its website, social media, wide cooperation with numerous travel agencies and by attracting the interest of the top-ranking global media. I was proud of the Polish stand on the ITB tourism fair in Berlin this year. Not only did Wrocław but the whole country present its tourist attractions in a professional and extremely attractive way.

We do our best to promote our hotel as well. Our aim is to show our hotel to the public and to help our social environment the best we can. Our cooperation with the National Museum to show their art pieces in our guest rooms is only the start. We will be looking for many more opportunities to support the activity of the city.

There are different initiatives promoting local products that are in line with our food concept pioneered by our Craft Restaurant and Bar. We go back to the original taste of the products and follow seasonality in order to maintain the high quality of the dishes offered and support local suppliers.

How do you see 2020 for the hotel, in a sentence or two?

I truly believe that 2020 is going to take the Bridge to the next level of success which we will achieve by supporting the local environment. And I encourage everyone to let us know what we can do for them so they benefit from the history and art that inspires us every day.

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Company Profile **Nativiana**

DISCOVERING A HIDDEN TREASURE

AmCham.pl Quarterly
editor Tom Ćwiok talks
with **John A. (Jack)
DeVito**, CEO of Nativiana,
a new entrant into the
mineral water market,
about its successful,
multifaceted business
development.

What can you tell us about the history of Nativiana?

A few years ago, Polish-American entrepreneur Jack Janiec, who had ties to the region of Roztocze, was made aware of a high quality, high capacity natural aquifer on the outskirts of the Roztocze National Park in the town of Krasnobród. Janiec contracted a Lublin-based geological company to find the best way to tap into the aquifer and it transpired that the water contained a unique blend of minerals making it a

very high-quality source of natural mineral water. He then proceeded to start up a business and began to purchase land and involve a few American investors. He contacted me and asked me to take a look at the venture to give him an assessment. I put together a group of beverage professionals that I had worked with in the past and we conducted an evaluation of the proposition. We concluded that this could really be a viable business proposition and began to develop a

plan for a factory and how to commercialize the business. The company has spent nearly PLN 75 million on the factory and over PLN 1.5 million on infrastructure projects in the Krasnobród community. We have three wells that pump water from more than 165 meters underground. It took us 16 months to build a production factory. We broke ground on April 1, 2018 and we shipped our first delivery on August 1, 2019. In that time, we hired and trained a

team of 30 people. Today, we have 27 distributors and our brand, Rodowita, is available in over 11,000 shops throughout Poland. We were also just recently listed on Frisco, the online supermarket retailer servicing homes and businesses in the Warsaw area.



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What is driving the mineral water market in Poland?

The market for bottled water is on the rise in Poland and it has a strong growth potential. In 2004, for exam-

ple, the market consumed 400 million liters of bottled water and in 2018 it reached nearly 4 billion liters. Yet, the consumption of bottled mineral water in Poland is about 50 percent of what it is in Germany. We expect to see this strong growth extend into the future. Healthy beverages are a part of an irreversible trend in Poland, Europe, and globally. Consumers are becoming more health and wellness focused. They are moving

In what way does the Rodowita brand differ from other bottled mineral waters on the market?

Rodowita is a naturally medium mineralized water that comes from a very high-quality, high capacity aquifer in a very pristine part of the country. Because our water has a medium level of minerals, you can

drink it all day long for healthy hydration and mineral benefit. With highly mineralized waters, if you drink them throughout the day for healthy hydration, you will consume too many minerals. On the other hand, with simple spring waters that you can consume all day, you do not receive any mineral benefit. Rodowita delivers a balance, it is the best of both worlds. We also have a very great tasting water because of the higher ratio of magnesium, which has a sweeter taste, to calcium, which has a chalkier taste.

It seems that Nativiana's corporate social responsibility played a huge part in the successful establishment of the company in the region...

We view corporate social responsibility as our moral obligation and not a business obligation. We had to put ourselves in the shoes of the local residents in the community. We knew that we had to communicate our plans up front and in an effective way to avoid misunderstandings and misinformation. In order to do this, we held two town hall meetings in 2018. The first one took place right before we started the construction of the factory. We explained our plans to the local community and let them know that it is a priority for us to be good neighbors and be a part of the community. We also wanted to address their needs. For instance, there was a community center that also served as a firehouse that was in disrepair for years. We decided to rebuild it so that the community would get the long-term benefit and in the short-term we used it as an office location until the factory was completed. We also repaved a three-kilometer road and installed sidewalks and lighting so that we can get our trucks in and out of Krasnobród in a safe way. These projects have been received very well by both the local officials and residents in the community. We have also hired people from the region. We held a job fair in Zamość, the main town in the area, in cooperation with the Mayor of Krasnobród and the Director of Labor for Zamość. We had over 40 applicants and we hired eight people. Seven of whom are from Krasnobród. The group went through a very exten-

sive 15-week-long training program in Germany where they learned how to operate and manage the production equipment. We are also working on an apprenticeship program to train local students so that they can assimilate into the factory and have jobs upon graduating school. This will start in 2020. We are also involved in the community. We sponsor and participate in local events and also support events held by the local parish. We are a part of the fabric of the community and we know that our involvement is well received and appreciated. People in the area are also very proud that water from Roztocze is sold across Poland and that it comes from their town. Roztocze is one of the most pristine parts of Poland and we know that we need to be responsible from an environmental standpoint. We are still defining what our further steps will be but we know that it will center around the Roztocze region. We are in discussions with The Association for Nature WOLF on details of cooperation. We are committed to supporting the Roztocze region.

You have had business experience with major water producers in many parts of the world. Looking at Poland, from your perspective, do you find it a good country for investors?

Our experience in Poland has been very favorable. We find the investment process to be very straight forward. Each government agency that you work with has a certain amount of time to approve or reject your plans, and as long as you know what is required up front and you go through the process, it is very straight forward with no obstacles. There are rules and regulations, of course, but if you do what you are supposed to do, conformity gets you completion faster. Overall, we have found the experience to be very positive. In fact, I find investing in Poland to be easier than in many other parts of the world. There are people here who are a little bit more open to investment than even in some parts of the United States.

How would you define a recipe for success in Poland based on the Nativiana experience so far?

Part of the secret to our success is

that we worked with local experts. We made sure that we work with people who understand the business, whether it is our accountant or attorney, architect, general contractor... they know how to navigate through the system. We learn from local experts. We also listen carefully to our customers in terms of how best to market and sell our product in the market place. We make it a point to go out into the market and discuss our business with our distributors and shop owners. We listen to people. We want to know where changes need to be made, and then we make them. We try not to sit in the office and tell the world how it should be, instead we go out and the world tells us the way it is and then we make adjustments. Generally, this is what we have found helps you to be successful in Poland. You do not try to do what worked in the US or Canada or the UK. You cannot do it here. Everything you do here has to be authentic.

What are the company's plans for 2020?

We're going to continue to focus on building distribution by signing up more distributors and retailers and we are also planning to introduce a few new products to our portfolio. We will also boost our advertising efforts to build brand awareness and communicate the high-quality and great taste of our water to consumers. We are positive that 2020 will be another successful year for us in Poland!

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Company Profile DaVita

TEAMMATES FOR LIFE

AmCham.pl Quarterly editor Tom Ćwiok talks with **Krzysztof Hurkacz**, President of the Board of Davita, a network of renal care clinics, about the growing medicare needs of the Polish society.

What can you tell me about the history of the company in Poland?

The history of DaVita began in 1999. That is when Kent Thiry, one of the most talented executives in the healthcare industry, took on the challenge of turning around Total Renal Care which was at the edge of bankruptcy. In 2000, he proposed a new approach for the organization's management by creating a democratic work environment that was based on values. With a new vision and strategy, employees—or

“teammates” as we call them—voted to change the name of the company to DaVita. In Italian, “DaVita” means “to give life” and the vision of the organisation was to create the best dialysis company in the world. Since then, the organization has been rapidly expanding. In 2011, DaVita started operating internationally. In 2013, it launched its operations in Poland. I have had the pleasure to manage the Polish branch since its inception. We started on the Polish market with

eight centres. In 2017, we acquired the Centrum Dializa network, thanks to which we are currently operating 50 dialysis centres, a nephrology ward, and several dozen specialist clinics throughout the country. Our priority is to provide the best possible care to patients with exceptionally challenging kidney diseases.

How important are the Polish operations of DaVita for the entire company?

DaVita operates in 11 countries, in-

cluding its home market. Its largest network is located in the US. The company has a total of over 3,000 dialysis centers, including 2,736 in the US, while the remaining 265 are located in other countries. In Poland, we operate 50 dialysis cen-

What is driving the market in Poland?

Since the late 1980s, the number of people requiring dialysis has been steadily growing. On the one hand, this is related to the general development of diagnostics, but that is not the only reason. Chronic kidney disease is more often a result of diseases of affluence, such as diabetes, arterial hypertension or atherosclerosis. The modern way of



ters and it is one of the most dynamic markets.

life is significantly driving their rise. On the other hand, medicine has made progress in treating vascular complications of these diseases. In the past, such patients were sadly dying, nowadays we save them. However, the price is further com-

plications related to kidney function. Thirdly, the demographics is also a factor: our society is ageing and elderly persons are the ones that are the most prone to chronic kidney disease.

What is the role of technology and R&D for the company?

Ever since DaVita started operating in Poland, we have been focused on using technology to improve the quality of healthcare services. As we are product independent, we are able to choose the most effective devices and tools available that help our teammates deliver high-quality care to our patient community. Digitisation of all treatment and support processes is necessary in modern healthcare and dialysis. According to a report by the Organisation for Economic Co-operation and Development, Poland can improve the implementation of such solutions in both outpatient and hospital care. DaVita, being a global kidney care company, gives us the opportunity to bring in best practices from clinical leaders around the globe. We adopt and implement learnings via these experiences to enhance patient care. We continually introduce and develop user-friendly tools to capture data and drive improved patient outcomes. Moreover, we leverage information and findings produced by the global medical community as well as our in-house international R&D team to innovate our care practices.

Is there anything regarding regulatory issues that you think can be improved so the company could better utilise its potential?

There are two opportunities I would prioritize to help improve patient care: surgery of vascular access and the reimbursement of the cost of drugs required in the treatment process. Surgical creation of vascular access is necessary to start an adequate dialysis treatment and mitigate health complications for a patient. However, we find that the current healthcare system in the country needs improvement to support the provision of these surgeries. It is also difficult to obtain some of the drugs that are important for the treatment process. Access to them is either unsupported by the public

insurer—as in the case with non-calcium based phosphate binders—or is guaranteed only under a drug scheme that does not support the drugs for all who need them. It is especially true with calcimimetics or active forms of vitamin D. So, developing an integrated care model and recalibrating a realistic cost of treatment in order to ensure comprehensive care to patients would enable us to break these barriers.

Many companies in Poland and in Europe face issues regarding workforce availability. Do you face such issues in Poland?

Yes, the Polish labor market is facing a decline in available labor in more and more industries. When it comes to the Polish healthcare industry, the problem is a systemic one as there are fewer physicians and nurses graduating from medical schools. A few years ago, there was also a strong trend of economic migration among Polish healthcare professionals. Therefore, companies providing healthcare services have to compete for new employees with increasing intensity.

What can you tell me about the corporate culture of the company?

Our patients are our focus. Our main objective is to provide them with safe care of the highest quality. To bring out the best in every teammate who has the honour of caring for our patients, we are anchored by seven core values. One is Continuous Improvement. That is why we—meaning both the medical personnel and the administrative staff—are constantly striving to improve the services we provide our patients. Another core value is Team, and above all, we work as a team—every day. We follow our motto: One for All, and All for One! In other words, we take care of our patients as intensely as we care for each other. Every DaVita teammate in Poland can count on support and help in difficult situations and unexpected problems. It is also important for us to find joy in what we do—even though dialysing is not an easy task—which is why the core value of fun exists and to achieve satisfaction and fulfilment, another core value, from helping others.

What is your company's approach

to corporate social responsibility and sustainability?

Above all, we try to create a local community for our patients to support them in managing their disease. For instance, we educate the patients' families on how they can help their loved ones in their daily management of their kidney disease. We also focus on putting patients on the Transplant Waiting List. This way, we promote the best form of renal replacement therapy that is also the least expensive one for the public payer.

Additionally, as dialysis treatment consumes large amounts of water and electricity, we try to optimize and promote efficient utilization and generate as little waste as possible.

What can you tell me about the company's plans in Poland for 2020 and beyond?

We are committed to providing and improving kidney care services to patients in Poland and across the world and, therefore, continually evaluate our portfolio. While there is nothing to report at this point, we will continue to share updates in the future.

The current healthcare system needs improvement in supporting the surgery of vascular access and the reimbursement of the cost of drugs required in the treatment process. The system needs to be an integrated care model with a realistic cost of treatment to ensure comprehensive care to patients.

Company Profile SAS Institute Poland

SNOWBALLING DATA VOLUMES

AmCham.pl Quarterly
editor Tom Ćwiok talks
with **Anna Muszyńska**,
Country Leader at
the SAS Institute Poland,
about how the company
innovates to meet the
needs of its clients
and employees.

With its entry into Poland in 1992, SAS was one of the first American investors in the country. What have been the milestones in the company's development in Poland since then?

The SAS Institute is in the group of important US investors on the Polish market. SAS has played a very important role in the economic transformation of Poland by providing analytics solutions for the growth of business and building a competitive advantage for Polish enterprises, as

well as assuring strategic support for public institutions. Today, customers are looking for providers of IT solutions and competencies that allow them to extract knowledge from snowballing data volumes and use it to build efficient organisations and innovative offerings. We work with the largest organisations in Poland and we are the leader of innovation in IT solutions that transform both the business and the government sectors. Our employees design and implement solutions used for fraud

detection, risk management, customer intelligence, optimisation of supply chains and logistic processes and many more. These systems are critical for enterprises in terms of their security, operational efficiency and, most importantly, competitiveness in the digital world.

of Polish users extends also to over 50 academic and research organizations that are developing key resources for growth in Poland in several sectors: economic, public, science and education. Our business model and extended offer have brought significant growth in rev-



What is the company's core business and its target, and what drives the market for the company in Poland?

SAS holds a leading position among analytics vendors on the Polish market. Today SAS in Poland employs about 330 skilled professionals. Our solutions support major Polish banks, insurance companies, telecommunications providers, energy and manufacturing producers, central public sector institutions, retail, logistics, services and many other sectors. The SAS community

enues, customer base and customer satisfaction.

Considering its products and services, in what way does SAS stand out from the competition?

When innovation in data analytics is today the key to success in business, SAS is focused on delivering superior software and services as well as on market education and enhancing customer awareness on how they could really benefit from analytics Artificial Intelligence. SAS Poland provides broad business

consulting competencies, thus gaining the capability to provide complex solutions to customer problems. Most important factors that have contributed to the overall success of SAS Poland are our people, market know-how, an effective go-to-market strategy and good reputation among customers.

For many companies in Poland, and in the EU, it is a challenge to recruit the talent they need, and that is especially true when it comes to software engineers and computer program developers. Is SAS facing such challenges in Poland?

As a company, we actively support initiatives that promote choosing careers in the IT industry. The increasingly globalised and computerised economy results in an enormous demand for IT professionals with specific competencies including emerging ones. Take, for example, data scientist specialisation. Students and their parents often do not even realise how much excitement and growth potential the modern digital world can offer to programmers, data analysts, project managers, system architects, business consultants, team leaders, etc. When promoting the use of analytics in business we also have to remember about building customer abilities to effectively use these systems for advanced decision support. This challenge requires the wider education of students in analytics, but also creating a bridge between academics and SAS customers so they cooperate on innovative projects solving the most advanced analytical challenges.

As an employer we put lot of effort into the recruitment process to identify candidates best suited to the company's corporate culture and customers' business needs. Well-matched candidates stay with SAS for a long time. We invest in attracting young talent. We offer training programs for the best students and graduates of IT, technical and economic faculties, such as the Young Talents Academy organized by our Warsaw office as well as SAS Sales Academy, Customer Advisory Academy and Technical Enablement Academy—an extensive training program located at our world headquarters in Cary, North Carolina,

which is designed to transfer knowledge of SAS products, analytics competencies and technical skills.

According to Wikipedia, SAS was used as a model for workplace perks at Google and is taught as a case study in management seminars at Stanford. Wikipedia explains that the company has a limited corporate hierarchy and an egalitarian culture, and that for decades the company has been ranked as one of the top employers and the best place to work. Can you give us some insights into the SAS corporate culture and how it works for the company in Poland?

At SAS, we offer jobs that make a difference. Satisfaction from work and its relevance to the business and social context are increasingly important for employees today. They feel proud and motivated when they are involved in major projects that transform customers' businesses or really improve the efficiency of public agencies. They also appreciate opportunities to develop skills and build competencies in technologies that are innovative and have growth potential. At SAS, we offer the opportunity to enter the exciting area of AI and analytics. As one of the fastest growing technology areas, it is related to important and strategic issues and allows for the comprehensive development of employees. It is always great to see that our daily work translates into the development of our country and society. SAS has built its very successful business and unique workplace culture in Poland. We have formed an exclusive and tight team of exceptional professionals who enjoy working together. We have implemented efficient employee motivation, recognition and rewards programs. We provide employees with a flexible benefit cafeteria. Employees decide which benefits they want to use and complete their own package. They can choose from medical care for employees and family members from the best suppliers, sports passes, English language courses, cinema and theatre tickets, children's camps, packages for newborns, holiday grants and service coupons. In our friendly environment, the employees find realization of their passions and are the

main force driving the company's achievement and success. As a result we have been recognized for our workplace culture. SAS was ranked No Three on the list of the Best Workplaces in Poland 2019 published by the Great Place to Work.

What can you tell me about the SAS Innovation Hub in Warsaw?

Among the most significant events in our history we can point to is the acquisition of the office building in Warsaw and opening of the conference and training center – SAS Innovation Hub. This interactive facility for presentations, demonstrations, training, workshops and conferences serves as a place to build relationships with customers and prospective customers. The center has five conference and training rooms and comfortable meeting facilities including a cafeteria and beautiful outdoor terraces. The major conference room accommodates up to 90 guests. The SAS Innovation Hub is highly appreciated by customers and partners. It gives a unique opportunity for knowledge-sharing, networking and development. It proves SAS reputation as an accessible, knowledgeable and innovative company. Customers and employees take advantage of this facility and confirm that the center provides comfortable conditions for effective teamwork and individual development.

I wonder what the SAS philosophy is when it comes to sustainable development and corporate social responsibility?

SAS's commitment to social responsibility continues to evolve and expand. For decades, we have developed software not only for commercial applications, but also

aimed at addressing economic, social and environmental issues. Among SAS's many social innovation initiatives, our greatest philanthropic focus is education. We believe we have a significant role to play in helping the new generation gain skills to quickly adapt to rapidly changing technology. SAS is part of the Data for Good movement, which encourages using data in meaningful ways to solve humanitarian issues around poverty, health, human rights, education and the environment. From energy conservation and solar projects connected by our smart campus technology to green buildings, waste reduction and recycling, we continue to foster a sustainable workplace while reducing our environmental footprint. We coordinate social responsibility events and we invite our employees to charity fundraising or other charity focused activities. We are applying our time, technology and expertise toward a social purpose to help better the future.

What are the company's plans for 2020 and beyond?

Today the speed of change in which organizations must adapt is unprecedented across all industries. This change is being driven by the digital economy focused on driving efficiency, customer centricity and the innovation of new business models. Just focusing on monetizing the existing activities is not a sound plan. Therefore, an agile approach and an open mindset are so important as without them businesses will not be able to keep up with their competitors and innovate. We aim to support our customers on their way to the future success as an experienced and reliable analytics partner.

Just focusing on monetizing the existing activities is not a sound plan. An agile approach and an open mindset are important as without them businesses will not be able to keep up with their competitors and innovate.

AMCHAM COMMITTEES



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Co-Chairs:
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AmCham Membership Directory

Alphabetical list of AmCham Corporate Members as of December 16, 2019.

No	Company Name	Person in charge		Position	Company website
1.	3M POLAND Sp. z o.o.	Alain	Simonnet	Managing Director	3M.com
A					
2.	ABBOTT LABORATORIES POLAND Sp. z o.o.	Sylvia	Borowska-Kurek	Country Manager	abbott.pl
3.	ABBVIE POLSKA	Jacek	Mazurkiewicz	General Manager	abbvie.pl
4.	ABTrex INTERNATIONAL Sp. z o.o.	Natalia	Łukaszewicz	Director of Operations	abtrex.com
5.	AC NIELSEN POLSKA Sp. z o.o.	Karolina	Zajdel-Pawlak	Managing Director	nielsen.com
6.	ACCENT BUSINESS TRAINING	Agata	Cielarska	CEO	accentbusiness.pl
7.	ACCENTURE Sp. z o.o.	Jarosław	Kroc	Chairman of the Board	accenture.pl
8.	ADECCO POLAND Sp. z o.o.	Anna	Wicha	Public Affairs EMEA	adecco.pl
9.	ADM DIRECT POLSKA Sp. z o.o.	Radosław	Stasiuk	General Manager Poland	adm.com
10.	ADORIA VINEYARDS - WHITNEY ADAMS Sp. z o.o.	Mike	Whitney	Managing Director	adoriavineyards.com
11.	ADVENT INTERNATIONAL Sp. z o.o.	Ralf	Huep	Managing Partner	adventinternational.pl
12.	AECOM POLSKA Sp. z o.o.	Jan	De Boom	Managing Director	aecom.com
13.	AGB NIELSEN MEDIA RESEARCH Sp. z o.o.	Elżbieta	Gorajewska	Managing Director	nielsen.com
14.	AGORA S.A.	Bartosz	Hojka	Chairman of the Board	agora.pl
15.	AGRI PLUS S.A. GROUP	Mirosław	Dackiewicz	Vice President	agriplus.pl
16.	AIR FRANCE S.A. Oddział w Polsce	Frantisek	Siling	General Director	airfrance.pl
17.	AIR PRODUCTS Sp. z o.o.	Jacek	Cichosz	Chairman	airproducts.com.pl
18.	AMAZON	Mariusz	Mielczarek	Head of Public Policy	amazon.com
19.	AMERICAN HEART OF POLAND	Bartosz	Sadowski	Chairman of the Board	klunikiserca.pl
20.	AMERICAN SCHOOL OF WARSAW	Jon	Zurfluh	Director	asw.waw.pl
21.	AMGEN Sp. Z o.o.	Gabor	Sztanislav	General Manager	amgen.com
22.	AMREST Sp. z o.o.	Mark	Chandler	Chief Financial Officer	amrest.eu
23.	AMWAY BUSINESS CENTRE-EUROPE Sp. z o.o.	Wojciech	Karpiński	Director	amway.com
24.	AMWAY POLSKA	Anna	Pietrzak	General Director Poland	amway.pl
25.	ANIMEX FOODS Sp. z o.o. sp.k.	Jacek	Dzielak	Chairman of the Board	animex.pl
26.	APOLLO-RIDA POLAND Sp. z o.o.	Rafał	Nowicki	Vice President	apolllorida.com.pl
27.	APTIV	Tomasz	Miśniakiewicz	Country Director & CFO	aptiv.com
28.	ARCADIS	Jarosław	Miziołek	Chairman of the Board	arcadis.com
29.	ARRIS POLAND Sp. z o.o.	Arek	Zawada	Vice President	arris.com
30.	ASB POLAND Sp. z o.o.	Przemysław	Gut	Business Development Manager	asbgroup.eu
31.	ASSESSMENT SYSTEMS POLAND Sp. z o.o.	Iwona	Piwowar	Country Leader	asystems.as
32.	ASTRAZENECA PHARMA POLAND Sp. z o.o.	Jarek	Oleszczuk	President of the Board	astrazeneca.pl
33.	AVIS POLSKA	Sascha	Hümmerich	General Manager	avis.pl
34.	AXN POLAND Sp. z o.o. (owned by Sony Pictures)	Artur	Gronkiewicz	General Manager Poland & Czech Republic	sonypictures.com
B					
35.	BADGER Sp. z o.o.	Adam	Borowski	Vice President	badgerclub.pl
36.	BAE SYSTEMS (POLAND) Sp. z o.o.	Jonathan	Parr	Director Central & Eastern Europe	baesystems.com
37.	BAIN & COMPANY POLAND Sp. z o.o.	Jacek	Poświata	Managing Director	bain.com
38.	Baker McKenzie Krzyżowski i Wspólnicy sp.k.	Piotr	Rawski	Managing Partner	bakermckenzie.com
39.	BAMA EUROPA Sp. z o.o.	Marlena	Siewruk	Finance Manager	bama.com
40.	BANK BPH S.A.	Paweł	Bandurski	Chairman of the Board	bph.pl
41.	BANK POLSKA KASA OPIEKI S.A.	Marek	Lusztyn	Chairman of the Board	pekao.com.pl
42.	BAXTER POLAND Sp. z o.o.	Krzysztof	Popławski	General Manager	baxter.com
43.	BAYER Sp. Z o.o.	Markus	Baltzer	Chairman of the Board	bayer.com.pl
44.	BECTON DICKINSON POLSKA Sp. z o.o.	Lukasz	Korybalski	Country General Manager	BD.com
45.	BELL HELICOPTER	Joel	Best	Director Europe	bellhelicopter.com
46.	BFF POLSKA S.A.	Krzysztof	Kawalec	Director Europe	bffgroup.com
47.	BIOGEN POLAND Sp. z o.o.	Piotr	Debski	Country Director	biogen-poland.pl
48.	BIOMARIN EUROPE LTD. Sp. z o.o.	Anna	Pisuk	Senior Manager Poland	biomarin.com
49.	BNP PARIBAS BANK POLSKA S.A.	Joseph	Wancer	Chairman of the Supervisory Board	bgzbnpparibas.pl
50.	BOEING INTERNATIONAL CORPORATION S.A. Poland	Stanley Joseph	Prusinski	Director, Boeing Defense - Poland & Eastern Europe	boeing.com
51.	BOSTON CONSULTING GROUP Sp. z o.o.	Franciszek	Hutten-Czapski	Senior Partner & Managing Director	bcg.com.pl
52.	BOSTON SCIENTIFIC POLSKA Sp. z o.o.	Mariusz	Knap	Trade Director Eastern Europe and Central Asia	bsci.com
53.	BOYDEN	Zbigniew	Płaza	Managing Director	boyden.com
54.	BP EUROPA SA, Oddział w Polsce	Bogdan	Kucharski	Head of Country Poland	bp.pl
55.	BRISTOL HOTEL	Roman	Goetsch	General Manager	luxurycollection.com
56.	BRISTOL-MYERS SQUIBB POLSKA Sp. z o.o.	Antoni	Żarski	General Director	b-ms.pl
57.	BRITISH AMERICAN TOBACCO POLSKA TRADING Sp. z o.o.	Sacha	Ruffier	Area Director of NCEA	bat.com.pl
58.	BROWN BROTHERS HARRIMAN (POLAND) Sp. z o.o.	Haluk	Akdemir	Managing Director	bbh.com
59.	BROWN-FORMAN POLSKA Sp. z o.o.	Biba	Konieczna-Sano	Managing Director	brown-forman.com
C					
60.	C.H. ROBINSON POLAND Sp. z o.o.	Arkadiusz	Glinka	European Director	chrobinson.com
61.	CAN PACK S.A.	Roberto	Villaquiran	CEO	canpack.eu
62.	CARGILL POLAND Sp. z o.o.	Iwona	Wdowczyk	Board Member	cargill.com.pl
63.	CASINOS POLAND LTD.	Nikolaus	Strohriegel	Chairman of the Board	cnty.com
64.	CATERPILLAR FINANCIAL SERVICES POLAND Sp. z o.o.	Jarosław	Myszkowski	Country Manager	cat.com
65.	CBRE Sp. z o.o.	Daniel	Bienias	Country Manager	cbre.pl
66.	CDM SMITH	Jan	Zabierzewski	President of the Management Board	cdmsmith.com
67.	CEC GOVERNMENT RELATIONS Sp. z o.o.	Marek	Matraszek	Chairman	cecgr.com
68.	CELGENE Sp. z o.o.	Marzena	Sosnowska	Project Lead Poland & Baltics	celgene.com
69.	CENTURYLINK POLAND Sp. z o.o.	Tim	Oldenburg	Operations Director Poland	centurylinktechnology.com
70.	CHWMEG	Randy	Mott	Director	chwmeq.org
71.	CIMA(CHARTERED INSTITUTE OF MANAGEMENT ACCOUNTANTS)	Jakub	Bejnarowicz	Associate Director	cimaglobal.com
72.	CISCO SYSTEMS POLAND Sp. z o.o.	Przemysław	Kania	Managing Director	cisco.pl
73.	CITI HANDLOWY	Sławomir	S. Sikora	Country Officer Poland	cithandlowy.pl
74.	CLEAR CHANNEL POLAND Sp. z o.o.	Marcin	Ciężki	Company Director	clearchannel.com.pl
75.	CMC POLAND Sp. z o.o.	Jerzy	Kozicz	Chairman of the Management Board	cmc.com
76.	CMS CAMERON MCKENNA Nabarro Olswang Pośniak i Sawicki	Andrzej	Pośniak	Associate Director	cmslegal.com
77.	COCA COLA POLAND SERVICES Sp. z o.o.	Rory	Taylor	General Director	cocacola.com.pl
78.	COLGATE-PALMOLIVE POLAND Sp. z o.o.	Wojciech	Król	General Manager	colgate.pl
79.	COLLINS AEROSPACE	Radek	Majda	Board President	collinsaerospace.com
80.	CORNING OPTICAL COMMUNICATIONS POLSKA Sp. z o.o.	Mariusz	Bielawski	Member of the Board	corning.com
81.	COURTYARD BY MARRTIOTT WARSAW AIRPORT	Aneta	Stępkowska	General Manager	courtyard.com
82.	CRESA POLSKA Sp. z o.o.	Piotr	Kaszyński	Managing Partner	cresa.com
83.	CUBIC GLOBAL DEFENSE	Mark	Grafer	VP & Managing Director	cubic.com
84.	CUMMINS Ltd. Sp. z o.o. Oddział w Polsce	Paweł	Gospodarczyk	Country Leader	cumminseurope.com
85.	CUSHMAN & WAKEFIELD POLSKA Sp. z o.o.	Charles	Taylor	Managing Partner	cushmanwakefield.pl/
86.	CVC CAPITAL PARTNERS (POLAND) Sp. z o.o.	Krzysztof	Krawczyk	Partner	cvc.com

For the most recent information about
the **AmCham Committees** and upcoming events visit
AMCHAM.PL

AmCham Membership Directory

Alphabetical list of AmCham Corporate Members as of December 16, 2019.

No	Company Name D, E	Person in charge	Position	Company website
87.	DAVITA Sp. z o.o.	Krzysztof Hurkacz	General Manager	davita.pl
88.	DCT GDĄSK SA	Cameron Thorpe	President	dctgdansk.com
89.	DEBENEDETTI MAJEWSKI SZCZESNIAK	David DeBenedetti	Partner	dms-legal.com
90.	DELOITTE POLSKA Sp. z o.o.	Marek Metrycki	Managing Partner	deloitte.com/pl
91.	DENTONS EUROPE DĄBROWSKI I WSPÓLNICY sp.k.	Arkadiusz Krasnodebski	Managing Partner	dentons.com
92.	DEUTSCHE LUFTHANSA S.A. Oddział w Polsce	Frank Wagner	Country Manager Poland	www.LH.com
93.	DIEBOLD NIXDORF Sp. z o.o.	Michał Strzyczkowski	Retail Department Director	DieboldNixdorf.com
94.	DIRECTPL	Angelo Pressello	Managing Director	directpl.com
95.	DLA PIPER	Jacek Giziński	Co-Managing Partner	dlapiper.com
96.	DOUBLETREE BY HILTON WROCŁAW	Matthias Herd	General Manager	wroclaw.doubletree.com
97.	DOW POLSKA Sp. z o.o.	Emilia Wasilewicz	Country Leader	dow.com
98.	DUPONT POLAND Sp. z o.o.	Andrzej Pałka	Head of Sales & Marketing	dupont.pl
99.	EATON AUTOMOTIVE COMPONENTS	Andrzej Czernek	Country Controller	eaton.com
100.	ECHO INVESTMENT S.A.	Maciej Drozd	CFO	echo.com.pl
101.	EDGECONNEX WARSAW Sp. z o.o.	Dick Theunissen	Managing Director	edgeconnex.com
102.	EGON ZEHNDR INTERNATIONAL Sp. z o.o.	Jarosław Bachowski	Managing Partner	egonzehnder.com
103.	ELANCO	Piotr Bonisławski	Head of EU Government Affairs and Market Access CEE & Russia	elanco.com
104.	ELI LILLY POLSKA Sp. z o.o.	Beata Wcisło	Country Manager	lilly.pl
105.	EMERSON PROCESS MANAGEMENT Sp. z o.o.	Tomasz Kosik	General Manager Poland, Baltics & Ukraine	emerson.com/pl-pl
106.	EMITEL S.A.	Andrzej Kozłowski	Chairman of the Board	emitel.pl
107.	ENEL X	Jacek Misiejuk	Managing Director	enelx.pl
108.	ENTERPRISE INVESTORS	Jacek Siwicki	President	ei.com.pl
109.	EPSTEIN Sp. z o.o.	Janusz Lichocki	President	epstein.com.pl
110.	EQUINIX (POLAND) Sp. z o.o.	Robert Busz	Managing Director	equinix.pl
111.	ERM POLSKA Sp. z o.o.	Magda Pavlak Chiaradia	Managing Director	erm.com
112.	ESTEE LAUDER POLAND Sp. z o.o.	Joanna Zboch	General Manager	esteeauder.com
113.	EURONET POLSKA Sp. z o.o.	Marek Szafirski	President	euronetworldwide.com
114.	EXPRESS MAP POLSKA Sp. z o.o.	Janusz Przeroek	President	e-map.pl
115.	EXYTE CENTRAL EUROPE Sp. z o.o. Oddział w Polsce	Bartłomiej Ślusarski	Director	exyte.net
116.	EY POLSKA	Jacek Kędzior	Managing Partner	ey.com
F, G				
117.	F5 NETWORKS POLAND	Ireneusz Wiśniewski	Country Leader	F5.com
118.	FACEBOOK POLAND	Robert Bednarski	Country Director	facebook.com
119.	FCM TRAVEL EXPRESS Sp. z o.o.	Tim Hyland	Managing Director	fcctravel.com
120.	FEDEX EXPRESS POLAND INTERNATIONAL Sp. z o.o.	Mariusz Mik	Vice President Eastern Europe Operations	fedex.com
121.	FIAT CHRYSLER POLSKA Sp. z o.o.	Henryka Bochniarz	Member of the Board	fcagroup.pl
122.	FIRESTONE INDUSTRIAL PRODUCTS POLAND Sp. z o.o.	Paweł Krystek	Plant Manager	firestoneip.com
123.	FIRST DATA POLSKA S.A.	Krzysztof Poloriczyk	General Manager	firstdata.com
124.	FISERV POLSKA Sp. z o.o.	Aleksandra Gren	General Director	fiserv.com
125.	FLEX	Marek Huzarewicz	General Director	flex.com
126.	FLUOR S.A.	Grzegorz Czul	General Manager	fluor.pl
127.	FOCUS RESEARCH INTERNATIONAL	Richard Zabinski	President & CEO	focusmr.com
128.	FOREVER LIVING PRODUCTS POLAND Sp. z o.o.	Jacek Kadefor	Managing Director	flpp.com
129.	FRACHT FWO POLSKA SP. Z O.O.	Andrzej Bułka	Managing Director	frachtfwo.pl
130.	FRITO-LAY POLAND Sp. z o.o.	Michał Jaszczuk	General Manager Poland	fritolay.pl
131.	GARMIN POLSKA Sp. z o.o.	Przemysław Łojek	Managing Director	garmin.pl
132.	GE INTERNATIONAL S.A. POLSKA	Sławomir Zygowski	Chairman of the Boar GE Power	ge.com
133.	GEMINI POLSKA Sp. z o.o.	Artur Łakomic	General Director	aptekgemini.pl
134.	GEOPOLITICAL INTELLIGENCE SERVICES AG	Joanna Benz	Advisor to the Board	gisreportsonline.com
135.	GILEAD SCIENCES POLAND Sp. z o.o.	Michał Kaźmierski	General Manager	gilead.com
136.	GLOBAL BLUE POLSKA Sp. z o.o.	Henrietta Varju	Managing Director	globalblue.com
137.	GOLUB GETHOUSE Sp. z o.o.	Czarek Jarząbek	President	golubgethouse.pl
138.	GOODYEAR DUNLOP TIRES POLSKA Sp. z o.o.	Jacek Pryczek	Managing Director	goodyear.pl
139.	GOOGLE POLAND Sp. z o.o.	Artur Waliszewski	Country Manager	google.com
140.	GP STRATEGIES CORPORATION Sp. z o.o.	Łukasz Kolendowicz	Member of the Board	gpstrategies.com
141.	GREENBERG TRAURIG	Jarosław Grześlak	Managing Partner	gtlaw.com
142.	GREMI INTERNATIONAL Sp. z o.o. Oddział w Polsce	Grzegorz Hajdarowicz	Member of the Board	gremi.pl
143.	GRIFFIN REAL ESTATE Sp. z o.o.	Maciej Dyjas	CEO	griffin-re.com
H, I				
144.	H+K STRATEGIES	Grzegorz Szczepanski	CEO	hkstrategies.pl
145.	HBO POLSKA Sp. z o.o.	Michał Walewski	Office Head	hbo.pl
146.	HEIDRICK & STRUGGLES	Robert Szymanski	Partner in Charge	heidrick.com
147.	HERMAN MILLER LIMITED	Maciej Karbownik	Owner K&R Design	hermanmiller.co.uk
148.	HEWLETT PACKARD ENTERPRISE GLOBAL BUSINESS CENTER Sp.z o.o.	Katarzyna Turkiewicz	Chairman	hpe.com
149.	HEWLETT PACKARD ENTERPRISE POLSKA Sp. z o.o.	Michał Zajączkowski	Managing Director	hpe.com
150.	HILTON WARSAW HOTEL & CONVENTION CENTRE	Robert Krygsman	General Manager	warsaw.hilton.com
151.	HINES POLSKA Sp. z o.o.	Mieczysław Godzisz	Managing Director	hines.pl
152.	HOLIDAY INN GDĄSK	Magdalena Suliga	General Manager	ihg.com
153.	HOLIDAY INN KRAKÓW CITY CENTER	Yossi Wircer	General Manager	hik.krakow.pl
154.	HOLIDAY INN WARSAW CITY CENTER	Marek Koszewski	General Director	ihg.com
155.	HONEYWELL Sp. z o.o.	Marek Łada	Chairman of the Board	honeywell.com.pl
156.	HP INC POLSKA Sp. z o.o.	Marcin Olszewski	Managing Director	www8.hp.com
157.	HR SOLUTIONS GROUP	Joanna Bojarska-Buchcic	Managing Partner	hrsolutions-group.com
158.	HSBC BANK POLSKA S.A.	Michał Mrozek	President	hsbc.pl
159.	IBM POLSKA Sp. z o.o.	Jarosław Szymczuk	General Manager	ibm.com/pl
160.	IGT POLAND Sp. z o.o.	Wojciech Włodarczyk	President of the Management Board	igtpoland.com
161.	INSTANT POLSKA Sp. z o.o.	Piotr Wachowiak	Board Member	instant.com.pl
162.	INTEGER.PL S.A.	Rafał Brzoska	CEO	inpost.pl
163.	INTEGRAL SOLUTIONS Sp. z o.o.	Paweł Borkowski	Managing Director	integralsolutions.pl
164.	INTERCONTINENTAL HOTEL WARSZAWA	Marten Schoenrock	General Manager	warsaw.intercontinental.com
165.	INTERNATIONAL PAPER KWIDZYN Sp. z o.o.	Aneta Muskala	President of the Board	ipaper.com.pl
166.	INTERNATIONAL PAPER POLSKA Sp. z o.o.	Maciej Dec	General Manager	ipaper.com.pl
167.	IQOR GLOBAL SERVICES POLAND Sp. z o.o.	Bogdan Kardas	Senior Site Director	iqor.com
168.	IQOR POLSKA Sp. z o.o.	Maciej Michalewicz	Chairman of the Board	iqor.com
169.	IQVIA COMMERCIAL Sp. z o.o.	Maciej Kuźmierkiewicz	VP East Europe, General Manager Poland	iqvia.com
170.	IRON MOUNTAIN POLSKA Sp. z o.o.	Sylvia Pyśkiewicz	General Manager	emea.ironmountain.com

No	Company Name J, K, L	Person in charge	Position	Company website
171.	J.P. MORGAN POLAND SERVICES	Steven Cohen	Managing Director	ipmorgan.com
172.	JACOBS	Jonathan Billings	Global GDC Director and Area Lead for Poland	jacobs.com
173.	JANSEN CILAG POLSKA Sp. z o.o.	Magdalena Lisiecka	Managing Director	janssen.com/poland/
174.	JEPPESSEN POLAND Sp. z o.o.	Rafał Stepnowski	Vice President Boeing Digital Aviation & Analytics	jeppesen.com
175.	JLL (Jones Lang LaSalle)	Tomasz Trzosto	Managing Director	jll.pl
176.	JOHN DEERE POLSKA Sp. z o.o.	Mirosław Leszczyński	General Manager	deere.pl
177.	JOHNSON & JOHNSON POLAND Sp. z o.o.	Marzena Kulis	Managing Director	ijnpoland.pl
178.	JOY GLOBAL POLSKA Sp. z o.o.	Grzegorz Kucharski	CEO	mining.komatsu
179.	JUUL LABS POLAND Sp. z o.o.	Leszek Gawęł	Board Member	juul.com
180.	KAJIMA POLAND Sp. z o.o.	Maciej Runkiewicz	President	kajima.pl
181.	KATO LABS Sp. z o.o.	Janusz Wołejko	President	kato.pl
182.	KCR S.A.	Mike Jagielski	Chairman of the Board	kccro.com
183.	KELLY SERVICES POLAND Sp. z o.o.	Robert Skok	Branch Manager/Proxy	kellyservices.pl
184.	KGHM POLSKA MIEDŹ S.A.	Paweł Gruza	Deputy Vice Chairman	kgm.com
185.	KPMG Sp. z o.o.	Stacy Ligas	Managing Partner	kpmg.pl
186.	KULSKI FOUNDATION FOR POLISH-AMERICAN RELATIONS	Małgorzata Bogusz	President of the Board	fundacjakulskich.org.pl
187.	LEADERSHIP & MANAGEMENT INSTITUTE Sp. z o.o.	Andrew Blatiak	Partner	lmi.org.pl
188.	LEVI STRAUSS POLAND Sp. z o.o.	Maarten Slingerland	VP East Europe	levi.com
189.	LEXMARK INTERNATIONAL POLSKA Sp. z o.o.	Grzegorz Najda	Country General Manager	lexmark.pl
190.	LIDYA	Tomasz Sekalski	Country Director	lidya.co
191.	LINDEN MEDICAL GROUP	Sławomir Karasiński	Legal Adviser	fandk.com.pl
192.	LOCKHEED MARTIN GLOBAL INC. S.A.	Robert Orzyłowski	Director	lockheedmartin.com
193.	LODZ SPECIAL ECONOMIC ZONE JOINT-STOCK CO.	Marek Michalik	President of the Board	sse.lodz.pl
194.	LYNKA PROMOTIONAL SOLUTIONS	John Lynch	CEO& Founder	en.lynka.eu
195.	ŁASZCZUK I WSPOLNICY sp.k.	Aleksandra Faderewska-Waszkiewicz	Managing Partner	laszczuk.pl
M, N				
196.	MANPOWERGROUP Sp. z o.o.	Iwona Janas	General Director	manpowergroup.pl
197.	MARRIOTT WARSAW HOTEL	Robert Grader	General Manager	warsawmarriott.com
198.	MARS POLSKA Sp. z o.o.	Marzena Ignaczak	Corporate Affairs Director	mars.pl
199.	MARY KAY COSMETICS POLAND Sp. z o.o.	Ewa Kudlińska-Pyrz	General Manager	marykay.pl
200.	MASSIVE DESIGN Sp. z o.o.	Przemysław Stopa	President, Architect	massivedesign.pl
201.	MASTERCARD EUROPE SPRL, Poland	Bartosz Ciołkowski	General Manager	mastercard.pl
202.	MATTEL POLAND Sp. z o.o.	Ryszard Rozpondek	EMEA Finance Director	mattel.com
203.	MAXIMA EUROPE Sp. z o.o.	Patrick Jamal	President of Global Operations	maximaconsulting.com
204.	MAZOVIA CAPITAL	James Simmons	Partner	mazoviacapital.com
205.	MCCORMICK POLSKA SA	Harry Klompe	General Manager	kamis.pl
206.	MCDONALD'S POLSKA Sp. z o.o.	Adam Pienkowski	Managing Director	mcdonalds.pl
207.	MCKINSEY & COMPANY POLAND Sp. z o.o.	Marcin Putra	Managing Partner	mckinsey.com/pl
208.	MEDTRONIC POLAND Sp. z o.o.	Adam Jagoda	General Director	medtronic.com
209.	METLIFE S.A.	Mirosław Kiszyk	Chairman of the Board	metlife.pl
210.	MICROSOFT Sp. z o.o.	Mark Loughran	General Manager	microsoft.com
211.	MILLER, CANFIELD, W. BABICKI, A. CHELCHOWSKI I WSPÓLNICY Sp.k.	Richard Walawender	Senior Partner	millercanfield.pl
212.	MONDELEZ POLSKA Sp. z o.o.	Janusz Idczak	Managing Director	mondelezinternational.com
213.	MONEYGRAM POLAND Sp. z o.o.	Joanna Romańczuk	President	moneygram.com
214.	MORGAN PHILIPS HUDSON Sp. z o.o.	Jolanta Samul-Kowska	Managing Director	morganphilips.com
215.	MOTOROLA SOLUTIONS POLAND	Jacek Drabik	Country Manager	motorolasolutions.com
216.	MSD Polska Sp. z o.o.	Denis Vujicic	Managing Director	msd.pl
217.	MSLGROUP POLAND	Sebastian Hejnowski	CEO	mslgroup.pl
218.	MULTI POLAND Sp. z o.o.	Andreas Broskamp	Director	multi.eu
219.	MYLAN HEALTHCARE Sp. z o.o.	Tomasz Buczek	General Manager	mylan.com
220.	NALCO POLSKA Sp.z o.o.	Jakub Lelek	Managing Director	nalco.pl
221.	NATIVIANA ROZTOCZE Sp. z o.o.	John DeVito	CEO	rodowita.pl
222.	NCR Polska Sp. z o.o.	Bartłomiej Sliwa	President of the Board	ncr.com
223.	NORDSON POLSKA Sp. z o.o.	Jarosław Rutkowski	General Manager	nordson.com
224.	NORTHROP GRUMMAN CORPORATION	Tony Housh	Director Poland, Central Europe and Baltics	northropgrumman.com
225.	NOVARTIS POLAND Sp. z o.o.	Paul Van Arkel	CPO Head and Country President	novartis.pl
O, P, Q				
226.	ODGERS BERNDTSON	Richard Witold Kałużyński	Managing Partner	odgersberndtson.com
227.	ORANGE POLSKA S.A.	Drózd	Member of the Management Board	orange.pl
228.	OTIS Sp. z o.o.	Piotr Kania	Managing Director Poland & Baltic States	otis.com.pl
229.	PANATTONI DEVELOPMENT EUROPE Sp. z o.o.	Marek Dobrzycki	Managing Partner Europe	panattonieurope.com
230.	PEGASYSTEMS	Jarosław Maślanka	Director, Business Operations	pega.com
231.	PEPSI-COLA GENERAL BOTTLERS POLAND Sp. z o.o.	Christophe Guille	General Manager	pepsi.pl
232.	PFIZER POLSKA Sp. z o.o.	Dorota Hryniewiecka-Firlej	Country Manager	pfizer.com.pl
233.	PHILIP MORRIS POLSKA DISTRIBUTION Sp. z o.o.	Michał Mierzejewski	Chairman of the Board	philipmorris.pl
234.	PHILIPS POLSKA Sp. z o.o.	Reinier Schlatmann	CEO Central & Eastern Europe	philips.pl
235.	PINKERTON	Joanna Paczeński	Director	pinkerton.com
236.	PKP ENERGETYKA S.A.	Wojciech Orzech	Chairman	pkpenergetyka.pl
237.	PM Group Polska Sp. z o.o.	John Hamilton	Managing Director	pmgroup-global.com
238.	POLISH-US FULBRIGHT COMMISSION	Justyna Janiszewska	Executive Director	fulbright.edu.pl
239.	POLITYKA INSIGHT Sp. z o.o.	Andrzej Bobinski	Managing Director	politykainsight.pl
240.	POLY	Magdalena Wasiewicz	Channel Manager	poly.com
241.	PRATT & WHITNEY a United Technology Company	Zbigniew Gradowski	In-Country Program Manager	pratt-whitney.com
242.	PROCTER & GAMBLE DS POLSKA Sp. z o.o.	Geraldine Huse	CEO and Chairman of the Board, P&G Central Europe	pg-pl
243.	PROLOGIS	Paweł Sapek	Country Manager	prologis.com
244.	PUNO CONSULTING Sp. z o.o.	Peter Novak	President & CEO	punoconsulting.com
245.	PwC ADVISORY Sp. z o.o. sp.k	Adam Krasoń	CEO	pwc.com
246.	PZL MIELEC/ A SIKORSKY COMPANY	Janusz Zakrećki	President	pzmielec.com.pl
247.	QVC POLAND GLOBAL SERVICES Sp. z o.o.	Adrian Marciszewski	General Manager	qvc.com
R				
248.	RADZIKOWSKA, SZUBIELSKA I WSPÓLNICY sp.k.	Włodzimierz Radzikowski	Managing Partner	rslegal.pl
249.	RAMBOLL ENVIRON POLAND Sp. z o.o.	Magdalena Trybuch	Principal	ramboll-environ.com
250.	RAYTHEON POLSKA	Pete Bata	Vice President Raytheon, IAMD, Poland	raytheon.com
251.	ROCHE POLSKA Sp. z o.o.	Wiktor Janicki	General Manager	roche.pl
252.	ROCKWELL AUTOMATION Sp. z o.o.	Łukasz Niesłuchowski	General Director	rockwellautomation.pl
253.	RUSSELL REYNOLDS ASSOCIATES Sp. z o.o.	Dorota Czarnota	Managing Partner, Poland & CEE	russellreynolds.com
254.	RYMARZ ZDORT	Paweł Rymarz	Managing Partner	rymarz-zdort.com
S, T				
255.	S&P GLOBAL RATINGS	Marcin Petrykowski	Managing Director	spratings.pl
256.	SAAB TECHNOLOGIES POLAND Sp. z o.o.	Jyrki Kujansuu	Acting General Manager	saab.com
257.	SABRE POLSKA Sp. z o.o.	Sebastian Drzewiecki	General Manager	sabre.pl
258.	SANOFI-AVENTIS Sp. z o.o.	Magdalena Kruszewska	Chairman	sanofi-aventis.com.pl

AmCham Membership Directory

Alphabetical list of AmCham Corporate Members, as of December 16, 2019.

No	Company Name	Person in charge	Position	Company website
259.	SANTANDER BANK POLSKA S.A.	Michał Gajewski	CEO	santander.pl
260.	SAP POLSKA Sp. z o.o.	Kinga Piecuch	Chairman of the Board	sap.com
261.	SAS Poland (SAS Institute Sp. z o.o.)	Anna Muszyńska	Country Lead	sas.com
262.	SAVILLS Sp. z o.o.	Adam Pustelnik	Associate Director	savills.pl
263.	SHERATON GRAND KRAKÓW	Gabriela Ditetova	General Manager	sheraton.com
264.	SHERATON GRAND WARSAW	Angela Saliba	General Manager	sheraton.pl
265.	SIEMENS Sp. z o.o.	Dominika Bettman	Chairman of the Board	siemens.pl
266.	SITEL POLSKA Sp. z o.o.	Monika Röhr	Country Director	sitel.com
267.	SOFITEL WARSAW VICTORIA	Aneta Lewandowska	Acting General Manager	sofitel.com
268.	SPENCER STUART POLAND Sp. z o.o.	Andrzej Maciejewski	Managing Director	spencerstuart.com
269.	SQUIRE PATTON BOGGS ŚWIĘCICKI KRZĘŚNIAK SP.K.	Peter Świąćicki	Partner	squirepattonboggs.com
270.	STEELCASE S.A. Przedstawicielstwo w Polsce	Tamas Kovacs	Regional Sales Manager	steelcase.eu
271.	TAKEDA POLSKA Sp. z o.o.	Joanna Skarzyńska	Head of Patient, Value and Access	takeda.com
272.	TAKENAKA EUROPE GmbH – Poland Branch	Katsutoshi Takao	General Manager	takenaka.eu
273.	TECHSOUP FOUNDATION	Michał Szwarc	Management Board Member	fundacjatechsoup.pl
274.	THE BRIDGE WROCŁAW MGALLERY HOTEL COLLECTION	Timea Balzer	Senior Community Operations Manager	accor.com
275.	THE BRITISH SCHOOL Sp. z o. o.	Jacek Latkowski	Acting Principal	thebritishschool.pl
276.	TMF POLAND sp. z o.o.	Dagmara Witt Kuczynska	Operations Director	tmf-group.com
277.	TOP FARMS Sp. z o.o.	Tomasz Żdziebkowski	CEO	topfarms.pl
278.	TPSI Sp. z o.o.	Andrzej Twarowski	President of the Board	tpsi.sandler.com
279.	TRAVELPORT POLAND Sp. z o.o.	Aleksandra Tomaszewska	Country Manager	travelport.com
280.	TRENKWALDER	Wojciech Ratajczyk	CEO	pl.trenkwalder.com
281.	TVN S.A.	Piotr Korycki	Chairman of the Board	tvn.pl
U, W, X, Z				
282.	UBER POLAND Sp. z o.o.	Konstantin (Kosta) Matveev	Senior Community Operations Manager	uber.com
283.	UL INTERNATIONAL POLSKA Sp. z o.o.	Bogdan Maliszewski	Managing Director	ul.com
284.	UNIPHARM HOLDINGS Sp. z o.o.	Ernest Bartosik	Vice Chairman	unipharm.pl
285.	UNITED BUSINESS DEVELOPMENT S.A.	Peter Strupp	CEO	ubd.pl
286.	UNITED TECHNOLOGIES	Pascale Goffin	Coordinator Global Government Relations Europe	www.utc.com
287.	UNIVERSAL EXPRESS Sp. z o.o.	Stefan Hildt	Member of the Board	uer.pl
288.	UNIVERSAL LEAF TOBACCO POLAND Sp. z o.o.	Wojciech Lik	Chairman of the Board	universalleaf.com
289.	UNUM ŻYCIE TUİR S.A.	Aneta Podyma	President of the Board	unum.pl
290.	UPC POLSKA Sp. z o.o.	Patrycja Gołos	Vice President, Corporate Affairs, CEE Liberty Global (UPC Polska)	upc.pl
291.	UPS POLSKA Sp. Z O.O.	Piotr Sitarek	Country Manager	ups.com
292.	USECRYPT S.A.	Jakub Kokoszka	Authorized Representative	usecrypt.com
293.	UTi POLAND Sp. z o.o.	Krzysztof Gorecki	Director Government & Defense Services	pl.dsv.com
294.	VALMONT POLSKA Sp. z o.o.	Artur Grynkiewicz	Chairman of the Board	valmont.pl
295.	VARIAN MEDICAL SYSTEMS POLAND Sp. z o.o.	Aleksander Nauman	Chairman of the Board	varian.com
296.	VERTEX PHARMACEUTICALS (POLAND) Sp. z o.o.	Marek Macyszyn	General Manager	VRTX.com
297.	VERTIV POLAND Sp. z o.o.	Bartłomiej Raab	Country Manager	vertiv.com
298.	VF POLSKA DISTRIBUTION Sp. z o.o.	Marek Hińcz	Managing Director	vfc.com
299.	VISTRA CORPORATE SERVICES Sp. z o.o.	Kobus De Lange	Managing Director	vistra.com
300.	WAGON SWIDNICA Sp. z o. o.	Bogdan Leśniański	CEO	greenbrier-europe.com
301.	WALT DISNEY COMPANY (POLSKA) Sp. z o.o.	Katarzyna Westernmark	Managing Director	disney.pl
302.	WARDYŃSKI & PARTNERS	Tomasz Wardyński	CBE, Founding Partner	wardynski.com.pl
303.	WARNER BROS ENTERTAINMENT POLSKA Sp. z o.o.	Peter Schauerte	General Director	wbep.pl
304.	WARNER MUSIC POLAND Sp. z o.o.	Kinga Siennicka	Managaing Director	warnermusic.pl
305.	WARSAW DESTINATION ALLIANCE, FOUNDATION	Alex Kloszewski	Managing Director	destinationwarsaw.com
306.	WARSAW-ILLINOIS EXECUTIVE MBA	Tomasz Ludwicki	Managing Director	mcc.edu.pl
307.	WESTTECHESTER GROUP	Marcin Wielgosz	Country Manager	wgimglobal.com
308.	WESTERN UNION INVESTMENT BANK GmbH, Oddział w Polsce	Anna Frąckiewicz	Country Manager	business.westernunion.com
309.	WESTIN WARSAW	Michael Hopf	General Manager	westin.pl
310.	WHIRLPOOL POLSKA Sp z o.o.	Fabio Pommella	Chairman of the Board	whirlpool.pl
311.	WHITE&CASE M.STUDNIAREKI WSPÓLNICY-KANCELARIA PRAWNA sp.k. Marcin Studniarek	Brian Patterson	Managing Partner	whitecase.com
312.	WHITE STAR REAL ESTATE Sp. z o.o.	Brian Patterson	Managing Partner	whitestar-realestate.com
313.	WIERZBOWSKI EVERSHEDES SUTHERLAND Sp.k.	Krzysztof Wierzbowski	Senior Partner	eversheds-sutherland.pl
314.	WIND SERVICE Sp. z o.o.	Jarosław Bańka	President	windservice.pl
315.	WOLF THEISS	Karolina Stawowska	Partner	wolftheiss.com
316.	WOODWARD POLAND Sp. z o.o.	Dominik Kania	General Manager	woodward.com
317.	XEOS Sp. z o.o.	Stefan Schmuck	Managing Director of Operations	www.xeos.aero
318.	XEROX POLSKA Sp. z o.o.	Stuart Price	General Manager	xerox.com.pl
319.	XL-TAPE-INTERNATIONAL Sp. z o.o.	Peter Starzomski	President	bluedolphin.pl
320.	XYLEM WATER SOLUTIONS POLSKA Sp. zo .o.	Rafał Bonter	Managing Director	xylem.pl
321.	ZAKŁAD METALURGICZNY WSK RZESZÓW	Hugh Aiken	Chairman	zmwskrz.com
322.	ZABKA POLSKA Sp. z o.o.	Tomasz Sucharski	President	www.zabka.pl

Alphabetical list of AmCham Individual Members, as of December 16, 2019.

No	Member Name	Contact Phone	No	Member Name	Contact Phone
1.	John Richard Banka	+48 600-330-236	16.	Jolanta Koman Tourel	+48 606-374-200
2.	Thom Barnhardt	+48 508-143-963	17.	Richard Lada	+48 601-207-357
3.	Alain Bobet	+48 604-585-510	18.	Robert Manz	+48 601-355-333
4.	Zbigniew Cabaj	+48 881-454-329	19.	Seth McMillan	+48 576-289-995
5.	Robert Cano	+48 668152452	20.	George Michalski	+48 606-917-000
6.	André Chiaradia	+48 791-453-334	21.	Richard Osuch	+1 210-771-3220
7.	Tony Clarey	+48 601-951-300	22.	Włodzimierz Paszkowski	+48 22-835-3000
8.	Andrew Davis	+48 531-241-778	23.	Louis George Sampanis	+44 774-867-6074
9.	Richard Engel	+48 508-047-510	24.	Monika Sampanis	+48 784-478-615
10.	Nathaniel Espino	+48 696-041-731	25.	Curtis Strauss	+48 794-166-080
11.	Andrew Haggard	+48-576-952-322	26.	Tadeusz Szostak	+48 605-404-001
12.	Kent Holding	+48 791-111-777	27.	Jerzy Thieme	+48 601-282-812
13.	Chris Hutchinson	+48 507-627-608	28.	Stanley Urban	+48 502-709-190
14.	Roland Jarosz	+48 797-019-384	29.	Gedeon Werner	+1 203-500-8208
15.	Sylwester Klarowicz	+48 668-133-034	30.	Maciej Wilhelm	+48 512-432-340

Corporate Membership

Corporate membership is open to companies incorporated in the United States, partially owned by US companies, and international companies with a presence in both the US and Poland. The annual fee is PLN 10,000 paid in US\$ according to the NBP's daily average rate.

Individual Membership

Individual membership is available to any US citizen engaged in business in Poland, providing their company or employer is not eligible for corporate membership. Annual fee is PLN 2,000 paid in US\$ according to NBP's daily average rate.

AmCham Advisory Council



The Advisory Council of the American Chamber of Commerce in Poland is engaged in shaping our advocacy for better investment, creating policies, and working with key policy-makers in order to address important and highly relevant issues. The crucial role of companies gathered in the Advisory Council is emphasized by the special client care we provide to these premium members and the opportunity they have to cooperate at the highest level, including business to government dialogue, special networking events, as well as priority at our events.

Company Profile **Collins Aerospace**

HOLDING HIGH ALTITUDES

AmCham.pl Quarterly
editor Tom Ćwiok talks
with **Radosław Majda**,
General Director of
Collins Aerospace
Wrocław, a unit of United
Technologies Corpora-
tion, one of the leaders in
aviation and intelligent
technologies, about how
the company grows by
condensing its corporate
culture and diversifying
its business operations

What can you say about the company's history in Poland? What were the milestones?

Our Wrocław site has been operating as part of Collins Aerospace since 2011, but has a rich 70 year history in the community and was acquired from PZL Wrocław. Not many people, apart from the old Psie Pole community, know and remember that Wrocław has been a solid staple on the aviation map in Europe for many years. We continue to cultivate and develop this tradition.

Collins Aerospace is currently a leader in technologically advanced and intelligent solutions for the aviation and defense industry around the world. The company underwent an extremely important transformation in 2018. The acquisition of Rockwell Collins by UTC was a milestone in our business operations. UTC then merged Rockwell Collins with UTC Aerospace Systems to create Collins Aerospace. Thanks to this transformation, we have much greater possibilities, a more comprehensive offer,

experience, and a richer client portfolio, allowing us to grow faster.

What impact does Collins Aerospace operations in Poland have on the entire company?

Our global competitive edge is our ability to support the entire product life cycle. We have the Global Engineering Center, machining, special processes, assembly and manufacturing, repair and overhaul (MRO) capabilities. As a global supplier of specific technologies and products, we support many business units in our organization around the world.

be found in all Airbus, Boeing, Bombardier, and Embraer platforms. At present Collins employs 2,700 people in four plants in Poland, including 1,300 in Wrocław.

What drives the market today: technology, regulatory issues, others?

The aviation industry is lucky as the market is growing, coupled with forecasts and order books, show that the growth is sustainable. Due to the fact that planes are becoming more economical, ticket prices fall while the number of passengers



Over the last few years, we have seen many changes in the Wrocław plant. Throughout the past nine years, we have doubled our staff, and the value of delivered products and services has increased more than 12 times, which demonstrates the large scale of our development in Wrocław. We employ 250 qualified engineers at our Global Engineering Center in Poland. Over the years, we've invested almost USD 150 million dollars in development and parts produced in Wrocław can

increase at the same time. As a result, the number of produced aircrafts also grows. Looking at current trends, we can see a rapid technological development that in the future will have an even greater impact on the technical sophistication of manufactured aircrafts. Recently we have seen a significant progress in the field of aircraft engines. Today, engineers also work on hybrid propulsion in aviation, which is one of the biggest challenges in terms of technology.

Another area of development is related to the so-called "connected airplane," which allow technologies to monitor the status of an aircraft in real-time during the flight and transfer the data to airline operation centres. More intelligent and autonomous systems is another key focus area for Collins Aerospace. I also have to mention the changes in production technology—we are actively working on the use of additive technologies for the production of aviation parts. This is also important as it creates new possibilities in the way of constructing parts and sub-assemblies. Of course, I could list further examples of innovative solutions that will affect our daily lives, but it is also worth noting one more thing – it is the people we employ and cooperate with, who stand behind the innovations of the whole group and the Wrocław Center. Without them, all of this wouldn't be possible. We have passionate specialists and engineers. Thanks to them, we boldly reach for the new challenges using the benefits of technology to the fullest. It lets us increase the safety and comfort of passengers, which is one of our basic goals.

Many companies in Poland and Europe suffer from an insufficient workforce, especially when it comes to engineering and programming skills. Do you come across such issues in Poland?

Our industry is well prepared for the education and training of people. This means a lot and gives us advantages in recruiting new employees. We cooperate with Wrocław universities in order to encourage young people to pursue degrees in technical fields, and we actively participate in the Lower Silesian Aviation Cluster.

Our aim is to be open. We like to share knowledge about the company in order to attract ambitious, hard-working, and reliable candidates. This is best demonstrated by people who have been with us in some cases well over 45 years. We currently cooperate with primary schools, technical colleges and universities from Wrocław, where we eagerly promote the aviation industry and related job opportunities. Our policy is to popularize technical professions among children and

youth. With the Aviation Schools Center—*Lotnicze Zakłady Naukowe*—in Wrocław we have engaged in an ambitious project and launched a technical-mechanic class. The students also have the opportunity to learn about work in our company during internships. Another solution that works at Collins Aerospace are dual studies. It is a program implemented in cooperation with the Wrocław University of Technology. The participants combine their studies with gaining practical knowledge at work, which gives them labor market advantages at the very start. In addition, we run a GEC-P Academy program. It is addressed to the most talented graduates and gives them the opportunity to start working in our company with no professional experience, right after their studies. These activities will pay off in the future and protect us against possible staff shortages. It has been working great for many years. Building the trust and image of a reliable employer is the foundation of our company and has been rewarded many times in the past. People are our foundation and we need to take care of them.

What can you tell me about the company's corporate culture? What values do you promote?

We recently rolled out our *Culture Roadmap* for our Collins Aerospace employees, which embodies what we value as a company. The document defines what we do: "We Work together. We Tackle Big Challenges. We Keep Our Word." It also talks about what we believe in, which is "Trust, Respect, Integrity, Excellence, and Innovation." It's our intent that with every action every day, we will build on this culture.

I wonder what programs Collins Aerospace is implementing in Poland in terms of corporate social responsibility and sustainable development...

We have been involved in CSR for many years. The company recently launched its new CSR program called *Redefining Future* which is aimed at inspiring our youth, investing in our workforce, and strengthening our communities. We support one of Wrocław's centers for the education of intellectually disabled

children and youth. This activity primarily focuses on the organization of a number of initiatives and events for the pupils, aimed at their development and building positive experiences.

We have our Collins Aerospace Code of Ethics which is followed by all our employees. They take a series of trainings in this field throughout their onboarding process, beginning in week one.

We are strongly involved in charity, driven by our employee annual fundraising to help needy families from around Psie Pole—an area close to our location. In addition, we support blood donation: a couple of times a year we have a blood-collection drives. We also sponsor a charity relay race to help the most deprived children and their parents.

What are the company's plans in Poland for 2020 and the following years?

Next year will be full of ambitious initiatives and strong development. We plan to expand one of our businesses's operations with the renovation and repair of aircraft parts. We also will invest in advanced manufacturing technologies that allow our facilities to meet the needs of our customers for years to come. We look towards the future with hope and are ready to aim higher and higher.

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EXPERT Human relations

UNCLEAR FUTURE

There are many factors at play when it comes to how trends will shape the ways in which companies will use human resources, but five are more significant than others

The recent downturn in Poland's economy may bring into focus certain human resource challenges. There are a number of global changes that will be influencing the future of work in Poland in 2020 "and beyond", including:

- Demographic
- Advances in technology
- The increasing divide between educational curriculum and business requirements
- Increased globalization
- New models of work.

DEMOGRAPHIC

In much of Western Europe, USA and Japan the baby boom generation will be leaving the workforce in the next 15 years or so, which could potentially cause these economies to struggle. As a result of the global demographic changes, Poland has a distinct competitive advantage in Europe, namely the young workforce. Poland has an opportunity to welcome back over a million experienced, bold workers who could contribute to the economy. However, those returning may be discouraged if the revailing management style is still autocratic and hierarchical. In Poland we speak of innovation, we could start by managers being less tyrannical. If a worker fears his line manager will have the audacity to mention a minor improvement in the factory? Or certain inefficiencies

that the worker notices in the office? Unlikely because the line manager may rebuke the messenger of these bad tidings. So no Kaizen (small step) improvements, and innovation is stifled. Although the Western management style is not ideal, at least staff may feel free to talk to managers if they see possible improvements, some are even rewarded.

ADVANCES IN TECHNOLOGY

Technological advances in Europe are automating many routine tasks formerly performed by semi-skilled workers (those with a high-school diploma but not a degree). The technological advances force many mid-skilled workers to take low-wage jobs, resulting in a polarization of the job market into high- and low-skilled. The number of overqualified applicants and employees in low-skilled jobs will increase. These jobs may not be challenging or engaging to mid-skilled employees, potentially leading to decreased employee engagement, retention and productivity. In addition, productivity has increased substantially over the past few decades while workers' wages have remained flat or even fallen, creating an additional squeeze on wages which could soon be evident in Poland.



By Andrew Blatiak,
Director, Leadership and
Management Institute

THE INCREASING DIVIDE

Educational authorities in Poland are struggling to adapt their curriculum to meet the needs of the modern economy. Though the number of college graduates is growing in Poland, as in Europe, companies still report challenges in finding candidates with the right combination of technical and soft skills. Many high school and college graduates will not be prepared for the workplace. Filling STEM (science, technology, engineering and math) positions in the future could be challenging.

INCREASED GLOBALIZATION

Technology has made it possible for employees to work from any location and has made their physical presence in the office less important. The rapid growth of technology has eroded physical barriers to working and has enabled people in previously isolated countries to participate in global business, thus allowing work to be performed far from its original source. Telecommuting will increase in Poland and Europe and more jobs will be conducted virtually by remote workers. The talent pool, available to Polish employers, will grow as people in multiple countries become available to work. However, HR managers will encounter greater challenges in managing remote workers, evaluating productivity and fostering feelings of connection to the organization.

The rise of the Internet has facilitated a new way of working—crowdsourcing—with online marketplaces where workers and those with project work can connect and transact business.

NEW MODELS OF WORK

Certain traditional employment models will remain. However, the rise of the Internet has facilitated a new way of working called crowdsourcing. New websites such as Gigwalk, Mechanical Turk and TopCoder have created online marketplaces where workers and those with project work can connect and transact business. Employees can work for one company and, when work is slow, work for another, entirely separate, company. This practice avoids layoffs. Crowdsourcing is outsourcing from the crowd; it allows an organization to leverage the collective talent of the crowd to get work done, often in more efficient and cost-effective ways than the traditional employment model. By using "reputation scores" similar to sellers on e-Bay, these platforms will allow companies in Poland to quickly evaluate talent outside their own workforce.

EXPERT Labor law

FINE-TUNING EMPLOYEES' RIGHTS

New EU directives put new obligations on employers

In 2019, three new directives were added to employment law at the EU level. The new regulations involve such issues as work-life balance, informing employees of working conditions, and the protection of whistleblowers.

WORK-LIFE BALANCE

According to the drafters of the Work-Life Balance Directive (Directive (EU) 2019/1158 of 20 June 2019 on work-life balance for parents and carers and repealing Council Directive 2010/18/EU), the aim of the directive is to address the problem of the underemployment of women and to support their career development through better conditions allowing them to balance professional and private duties. The solutions provided by the directive address issues of equal treatment and equal opportunity on today's labor market, promote non-discrimination, and foster gender equality. The EU lawmakers pointed out that differentiation in the situation of women and men on the labor market is most strongly felt in the case of parents and others bearing the burden of caretakers. Furthermore, existing legal frameworks at the level of the EU and the member states have offered only limited incentives for men seeking to share caregiver obligations equally with women. To eliminate this differentiation and pursue the principle of equality of opportunity on the job market for men and women, and to help parents and other caretakers to better reconcile professional employment and caregiving duties, the directive adopts the aims of improving access to such work-life balance

solutions as holidays and flexible working arrangements, and increasing the degree to which men take parental leave and avail themselves of flexible working arrangements. The directive sets minimum requirements for paternity leave, parental leave, and carers' leave, as well as flexible working arrangements for employees who are parents or carers. It will cover all workers holding an employment contract, including those working part-time or for a definite period or under a contract with a temporary employment agency. The member states have until August 2, 2022, to implement the Work-Life Balance Directive.

WORKING CONDITIONS

The new Directive (EU) of 20 June 2019 on transparent and predictable working conditions in the European Union includes an update and the expansion of employers' existing obligations to inform employees of working conditions, arising under the current Council Directive 91/533/EEC of 14 October 1991 on an employer's obligation to inform employees of the conditions applicable to the contract or employment relationship, and also set new minimum requirements to ensure all employees, including those working under atypical contracts, greater transparency and predictability in their working conditions. The new directive supersedes Directive 91/533/EEC, which will be repealed three years after the effective date of the new directive. As stated in the preamble to the new directive, since the adoption of the previous directive in 1991,

"labour markets have undergone far-reaching changes due to demographic developments and digitalisation leading to the creation of new forms of employment, which have enhanced innovation, job creation and labour market growth. Some new forms of employment vary significantly from traditional employment relationships with regard to predictability, creating uncertainty with regard to the applicable rights and the social protection of the workers concerned."

Given this context, the European Commission launched a reform of the existing regulations to improve working conditions by promoting greater transparency and predictability of employment, while ensuring the ability for the labor market to adapt. This is to be achieved through specific goals set by the Commission, including improved access by employees to information on their working conditions, improved working conditions for all staff, particularly those employed in new, non-standard forms, while maintaining the possibility for adaptation and innovation on the labor market, improved compliance with standards for working conditions through better enforcement of the regulations, and greater transparency on the labor market, without imposing excessive burdens on enterprises of various sizes. These aims are reflected in the scope of the directive, which specifies employers' obligations related to informing employees of the basic aspects of the employment relationship, minimum requirements for working conditions (e.g. the maximum length of probation periods, and requirements for predictability of working time), requirements concerning employees' rights to pursue claims, and protection against negative consequences from exercise of their rights provided for in the directive.

The member states must take the steps necessary to execute this directive by August 1, 2022.



By Aleksandra Trzcińska,
Associate, Łaszczyk and
Partners

WHISTLEBLOWING

According to the drafters of the new Whistleblowing Directive (Directive (EU) 2019/1937 of 23 October 2019 on the protection of persons who report breaches of Union law), the activity of persons reporting (within an organization or to an external body) or disclosing (to the public) information about abuses, obtained in a work-related context, "play a key role in exposing and preventing such breaches and in safeguarding the welfare of society. However, potential whistleblowers are often discouraged from reporting their concerns or suspicions for fear of retaliation." Thus there is a need to provide effective whistleblower protection, which should translate into better protection of the public interest.

Under this directive, any institution, public or private, employing at least 50 people will have to establish a procedure for reporting irregularities and abuses. Whistleblowers will be able to disclose information to a designated person within the organization (internal channel), or directly to the competent authorities (external channel) or the media (public channel). A whistleblower can be any person in a position of professional, economic or factual dependency, regardless of the legal nature of the ties with the given organization, even if connected to the organization only indirectly or not for payment. Protection should also be ensured for third parties providing confidential advice to whistleblowers related to their reports. Persons with the status of whistleblower must not be persecuted, suspended, demoted or intimidated.

The member states have until December 17, 2021, to implement this directive.

EXPERT Commercial real estate

GROWTH TO CONTINUE

Commercial real estate market remains stable

The Polish commercial real estate market remains in very good health, which is evidenced by the strong interest of international investment funds. In the first three quarters of 2019, investment activity in Poland reached EUR 4.4bn, with offices accounting for over half of that total.

OFFICE MARKET

There is a fair degree of certainty that Warsaw will report the highest leasing volume on record. Office take-up hit 690,000 square meters in the first three quarters of the year compared to 624,000 square meters in the same period in 2018 with consolidating financial organisations being unusually active on the leasing market. The largest financial sector deals were done by mBank (45,600 square meters in Mennica Legacy Tower), Getin Noble (18,500 square meters in Warsaw Hub), Warta (17,600 square meters in Warsaw Unit) and Bank Gospodarstwa Krajowego (12,400 square meters in Varso 2). The office market maintains its strong growth momentum, with Warsaw notably ahead of regional cities in terms of leasing activity. In 2020, Warsaw will witness more than 400,000 square meters of office space delivered, of which over 70 percent has already been pre-let.

VACANCY RATES

Our research shows that regional cities will see their vacancy rates remain flat or edge up. In the third quarter of 2019, the vacancy rate stood at 12 percent in Łódź and at just above 11 percent in Poznań. But this is still a healthy market rate. The eight largest regional city markets are growing at a different rate than Warsaw. Companies that have

built a strong regional presence continue to expand and increase employment. To hire professionals, they will also need more and better office space. Some will choose new office buildings in prime locations offering additional amenities and expansion opportunities. Tenants need to remember that the rising service charges, which may frequently have a significant impact on total lease costs, have become a key negotiating issue both in new leases and renewals. That is why it is so important to conduct an audit before signing a lease in order to identify cost reduction opportunities.

WAREHOUSE MARKET

The industrial market is expected to deliver a new peak for warehouse space supply in excess of the previous record of 2,304,000 square meters built in 2017. In the first three quarters of 2019 alone, some 2,084,000 square meters came on stream. Interestingly enough, despite the healthy supply, average vacancy rates remained relatively low at 6.3 percent across the country and are unlikely to rise this year. Development activity is dominated by large industrial parks near key transportation routes and hubs. BTS (build to suit) projects developed to satisfy specific operational needs and Small Business Units on the outskirts of large cities remain very popular. There is, however, a paucity of plots with suitable zoning and infrastructure conditions and large enough to accommodate industrial projects in a relatively short time. Looking ahead, the establishment of the Polish Investment Zone will create in-



By **Piotr Kaszyński**, Managing Partner, Cresa Poland.

vestment opportunities and provide investor support—its effects are likely to become more tangible over time. The market will grow both in terms of quantity and quality of warehouse space and will be increasingly technology-powered. Eastern Poland, where talent acquisition is a lot easier than in western or central Poland, is also growing in significance, supported by further improvements to its road connections with the rest of the country. This region stands to benefit greatly from these changes in coming years.

HOSPITALITY MARKET

Hotels are increasingly appearing on the radars of investment funds which have been focused so far on office, retail and industrial assets. The global hospitality sector continues to grow exponentially. Europe has witnessed a steady revenue per available room (RevPAR) growth for nine years. In January-September 2019, RevPAR grew in Poland by 2.3 percent on the same period the previous year, roughly on par with the European growth rate. Despite healthy supply, rising labour and energy costs, the Polish market continues to attract international hotel chains offering a growing number of brands to a wide range of market segments. New hotels are needed in Kraków and Wrocław, where demand outstrips supply. Given the continued growth in tourist arrivals and business trips to Poland, the 2020 outlook remains positive for this sector.

Hospitality is attracting a growing

developer interest as new hotel chains have come onto the market offering long-term leases with limited operational risk to property owners who thus enjoy steady income streams. Looking ahead, this investment product is likely to increasingly figure on equity investors' radar.

2020 OUTLOOK

There is a growing investor interest in all sectors. In the first three quarters of 2019, investment activity in Poland reached EUR 4.4bn, with offices accounting for over half of that total. Retail came second (EUR 892m), followed by industrial assets (EUR 517m). Investment activity is also spreading to the hospitality market, which in the first three quarters of 2019 saw trading of EUR 191m, more than 60 percent above the equivalent level over the whole of 2018.

As Poland is seen as a stable and mature economy, we will see an increasing willingness of international capital to invest in our country, which could push yields slightly down, especially for prime assets in large cities. Compared to alternative assets, real estate will remain one of the most attractive investment product for equity investors.

As Poland is seen as a stable and mature economy, we will see an increasing willingness of international capital to invest in our country, which could push yields slightly down, especially for prime assets in large cities.

EXPERT Business strategy

IN THE LONG RUN



By **Andrew Harding**, FCMA, CGMA, Chief Executive, Management Accounting at the Association of International Certified Professional Accountants

of Apple and fall of Nokia should be well aware that market dominance can be here today and gone tomorrow. It is by responding to fast-changing developments in consumer behaviors and innovation, and by developing their digital capabilities, that businesses can make the most of digital transformation. Resilient businesses are digital first.

SKILLS DEVELOPMENT

Many businesses do not currently have the pipeline of talented and skilled employees they need to navigate our increasingly complex business world. And most finance teams and professionals are not evolving their skills fast enough to account for the impact of artificial intelligence, robotic process automation and other technologies, according to *Re-inventing finance for a digital world*, a study released at the beginning of 2019 by the Chartered Institute of Management Accountants (CIMA). Keeping up with digital transformation is not solely about investing in technology, it is largely about training your workforce so that your employees have the necessary skills to perform their roles now and in the future.

CUSTOMER INTELLIGENCE

Business leaders now have a range of tools and resources at their fingertips to help them make better decisions and optimise their operations. With interactions now happening online, in-store and through customer service channels, businesses must constantly gather, re-

view and analyse information to effectively engage with their customers, create sustainable success and refine strategic decision-making. In a very competitive global market, keeping up with what your customers want—and not what you think they want—to deliver a customer experience that meets, and ultimately exceeds expectations, can be your biggest advantage.

CYBERSECURITY

Digital transformation goes beyond deploying new technology solutions, it has also impacted businesses' security needs. In fact, according to the World Economic Forum, data fraud or theft, and cyber-attacks respectively rank fifth and sixth on the list of Top Ten Risks in terms of likelihood, and these can be quite costly. Cybersecurity breaches for large companies such as Marriott, Facebook, Equifax and Yahoo have each affected an average of 257 million customers, costing a whopping USD 347 million each time. Cybersecurity is more than just an IT issue and it must now be fully integrated—from creating a unified security architecture to sharing threat intelligence across the business—as part of your digital transformation to make sure your company's and customers' data is safe.

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Most of us can probably think of both great business success stories (Netflix, PayPal, and Apple), infamous downfalls (Kodak, Blockbuster, and MySpace) and possibly of a few failed ventures (Google Glasses, Microsoft Zune and Amazon's Fire Phone)—so if even the biggest companies have hurdles, one can wonder why some manage to overcome challenges while others seem to spiral down? What's the difference between them? The answer is simple: their ability to quickly adapt in the face of adversity—or in other words, their resilience.

The business world has markedly shifted in the last 20 years, and with machine learning, artificial intelligence, and automation spreading at breakneck speed, businesses must adequately prepare to harness their full potential. More than ever, regardless of size, location and sector, they must embrace innovation and build resilience to survive the complete overhaul of their environment in the 2020s. So what do business leaders need to focus on to build high-performing organisations?

PURPOSE

Advances in technology, along with changing customer expectations for faster and easier online experiences, have driven widespread change in how businesses create value, and placed a greater empha-

sis on intangible assets (e.g. intellectual property, software and reputation). With an estimated 80 percent of a company's value now locked up in intangible assets, business leaders can no longer build their business and reporting models solely based on the organisation's operational aspects and associated financial performance. They must create a broader business framework and assess performance beyond financial data to encompass the purpose, values and strategy of the organisation, and outline how it meets the long-term needs of its stakeholders (customers, employees and investors), contributes to society as a whole and accounts for new risks such as environmental, cyber, and societal risks. Resilient businesses are holistic and transparent.

DIGITAL TRANSFORMATION

To make the most of the digital world and build long-term, sustainable success, businesses must re-think how they operate if they want to stay, not only in but ahead of the game. Our Agile Finance Unleashed report, published in partnership with Oracle, found that businesses which had made most progress in successfully transforming their business model were those with a "digital first culture". In fact, anyone who remembers the meteoric rise

EXPERT **Brexit**ELEMENTARY
OPPORTUNITYWill Poland's chemical
sector make the most of
Brexit?

The Polish chemical industry boasts the second highest growth rate among the world's largest economies. Apart from having highly developed chemicals manufacturing and processing sectors, the services offered to the chemical sector have been gaining momentum and significance, and in the wake of Brexit, which now seems imminent following the Conservative Party's recent success in parliamentary election, a new growth area to be added to the increasing range of services could be REACH registration services and consortium management.

**SAFETY
MANAGEMENT**

Chemicals safety management is one of the long-term EU regulation areas of focus and development and the institution handling safety aspects of chemicals introduced to the EU market, and their compliance with the regulations, is the European Chemicals Agency (ECHA). Established in 2006, ECHA enforces EU chemical laws and assists enterprises in complying with regulations regarding chemicals stipulated in REACH¹. ECHA processes documents received from the manufacturers and examines them, in order to verify the substances in terms of compliance. In this regard, manufacturers have often used the services of specialist British-based consultancies.

As the EU grew over the years, a number of these specialist consultancies developed in the UK, providing services related to introducing products to the EU market. This has been the result of historical practices and long-lasting trade relations, as well as of cultural

and linguistic issues. As far as non-EU chemicals manufacturers are concerned, a much easier and more convenient way to register a product with the ECHA and import into the EU is to use these specialist consultants. This is why the UK is often considered the hub for bringing together non-EU chemicals manufacturers, particularly American, Australian and Asian with entities operating and supplying products in the EU markets. With Brexit, however, the UK will lose its status as an EU Member State and its membership of ECHA, and will have to develop its own UK REACH regime. This presents a potential opportunity for the Polish market to become (as it has for the financial sector), the location for centres of operations for global enterprises managing chemical imports and regulation in the EU.

OUT OF REACH

With the results of the UK elections, Brexit is almost certain to happen by January 31, 2020, with the UK then entering an implementation period until 31st December 2020 (extendable by mutual agreement for up to two years). During the implementation period, the UK will remain part of REACH (although the UK Health and Safety Executive may not be able to act as 'leading authority' to conduct certain assessments under REACH), but once the implementation period ends the UK will fall outside the REACH regime and companies that have been established in the UK will no longer be able to act in certain capacities under REACH.

Thus, Polish entities or branch offices of international consultancies specializing in REACH issues will



By **Igor Hanas**, *Of Counsel,
Squire Patton Boggs*

have the opportunity to develop this work and create new opportunities for Poland to become a new, key EU player for ECHA-subject services. Unquestionably, there are solid grounds for this presumption with well-qualified specialists, relatively attractive costs of services and, what is also being taken under advisement by certain non-EU international manufacturers, the subtle issue of rivalry with continental chemicals manufacturers and natural information flow within the business.

**REACH
OBLIGATIONS**

In order to register, import and fulfil the REACH-imposed obligations, a non-EU chemical manufacturer wishing to introduce its products to an EU market may incorporate its own special purpose vehicle or enlist the services of an Only Representative to act as importer. The first solution is often not economically viable, as chemicals are usually sold on a long-term basis and often in low volumes. For smaller volumes, it is more cost-efficient to delegate such obligations to an exclusive an Only Representative who then takes on all REACH regulatory obligations as first importer. Registration via an Only Representative also offers further protection from the point of view of a manufacturer's trade secrets, which is of utmost importance, particularly as far as innovative substances are concerned. An Only Representative is not obliged to disclose any poten-

tially confidential information to a national importer/customer. According to REACH, an Only Representative is obliged to have its registered office within the EU, which automatically rules out entities currently functioning in this capacity in the UK. Not only does REACH registration, and functioning in the capacity of an Only Representative entail rendering highly-skilled services and demand for niche expertise, but it also usually requires long-term operational services.

NEW OPPORTUNITY

Polish entities should make the most of the momentum caused by Brexit in order to develop as many services currently rendered in the UK as possible, as was the case with those London based financial institutions who relocated their centres of operations to Poland, creating more than 8,000 highly-skilled jobs. Taking over even a part of the services from the UK market would, in time, translate into broader access to the knowledge and trends in non-EU markets and boost the development of the local chemicals sector.

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EXPERT **Criminal law**WHERE DO
WE GO FROM
HERE?Third reform, questionable
results

On October 5, 2019, the third "fundamental" reform of Polish criminal procedures in the last four years came into force. With it, the procedures are supposed to be faster, fairer and less bureaucratic. We heard the same argument before when changes were introduced on July 5, 2015 and on April 15, 2016. But court cases have not speeded up. On the contrary, there are more complaints about delays and the State Treasury has to pay money to the victims of dilatory proceedings. The amendments already in force are varied. Some of them have been long awaited, others are completely new, and some are "cosmetic". However, we should start with the following conclusion: the new rules will be applied to cases already underway, changing the rules of the game. This is another example showing that stability of the law has not been an overriding value in the Polish legal system for a long time.

**EXPECTED
AMENDMENTS**

Some of the changes are meant to bring criminal procedures into the reality of the 21st century. Email is to be a permanent element of judicial and prosecutorial communications. Therefore, under threat of a request for supplementation, it will be necessary to provide the prosecutor and the court with a telephone number, fax number and email address, or to declare that you do not have them. It will be possible to deliver information on how the case has been concluded to the aggrieved party by email, as well as a legally binding decision closing the case. Importantly, experts will also be able to receive documents this way, which may speed up the preparation of opin-

ions.

Another novelty is the equal treatment of Saturdays and public holidays, just as in administrative and civil proceedings. Acceleration of cases is also to be achieved by limiting directness in court proceedings. Actions are to be repeated in court only when genuinely necessary—such as witness hearings. This will avoid activities directed at empty court rooms, such as announcing oral motives for a judgment or a decision, reading minutes from preliminary proceedings, or listing documents the court has found to be disclosed.

**CHANGES TO
APPEALS**

A lot of new features and surprises await the lawyer who has to appeal against a judgment. In the place of a defendant's lawyer about to hear the verdict, we would worry not only about the fate of the client, but also whether, in the event of an unfavorable decision, it will be possible to obtain a clear and logical justification for the judgment, as well as whether it will be possible to appeal it effectively. Why? The amendment introduces a justification for judgments on an official form, not known yet to anybody. Additionally, there are new grounds for appeal (including "infringements of substantive law not affecting the judgment"), new rules for appealing against the justification of the judgment itself, and changes to the evidentiary hearing before the appellate court.

**STRONGER PUBLIC
PROSECUTOR**

The new provisions do not change much in the conduct of pre-trial proceedings, except perhaps for the



By **Artur Pietryka**, *Advocate,
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Crime practice,
Wardyński & Partners*

limitation of the number of victims' hearings. However, this does not mean that the situation of the prosecutor will not change. First, the prosecutor will be able to suspend the execution of the court's decision on bail. The prosecutor's statement that he/she does not agree to the defendant's release on bail will remain in force until the appellate court issues a decision. Second, the new provisions will allow prosecutors to block "subsidiary" indictments (such as by a private complainant when the public prosecutor does not pursue the case). If the prosecutor repeatedly dismisses or refuses to pursue the case, the private complainant must appeal to a higher-ranking prosecutor and then wait (the law does not say how long) for his or her position in the matter, before filing a private indictment with the court. Third, the amendment introduces the rule that court proceedings are to be discontinued when a subsidiary prosecutor fails to appear at the trial without justification (say, gets stuck in a traffic jam). Fourth, the number of auxiliary prosecutors present at the trial along with the main prosecutor can be limited.

**EVIDENCE
PRECLUSION**

Evidence preclusion is a new element in criminal procedures. We can debate the effectiveness of this institution. Despite the existing solutions, Parliament has decided to make it possible to dismiss an application to admit evidence filed after a specified deadline, of which the party filing the motion was notified. At the same time, the provisions indicate that it will not be possible to dismiss evidence if, among other

things, the circumstance is of great relevance for determining whether a prohibited act was committed, whether it constitutes a criminal offense, and, if so, which one. Since the vast majority of requests for admission of evidence in criminal proceedings are directly or indirectly linked with such a finding, a double risk exists. The provision will either be a dead letter, or worse, will be abused by law enforcement authorities to limit the defense's ability to present evidence.

WHAT NEXT?

Time will tell how much the introduced changes will improve criminal proceedings. Today, there are already doubts in this regard. The amendment does not limit the jurisdiction of the courts. It will not relieve them from handling small, uncomplicated cases. It will not solve the problem of the lack of resources for work in the judiciary or the level of salaries of assistants, assessors and administrative employees. It will not create any backup for prosecutors and courts in the form of professional experts. It will not change the way work is organized or the system of setting dates for hearings, which today can be held several months apart, contrary to the principle of concentration of evidence. And these are the main reasons for inefficiency of the judicial system. Let's hope that the cure for these ills will not be yet another amendment.

*Time will tell how much the introduced
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doubts in this regard.*

EXPERT **Civil law**NEW RULES
OF COURT
ENGAGEMENT

The long-overdue reform of the Polish civil litigation was keenly awaited by both legal and business communities

In the 1990s, one radical change in Poland's legal system had to do with the role of courts in civil matters. Judges were to give up their pursuit of the "actual truth" and become dispassionate arbiters in an adversarial duel between litigants. But that change of paradigm encouraged a passive and, too often, ineffective handling of caseloads, which continued to grow steadily with the Polish economy. The current reform attempts to shift the paradigm yet again—this time, by charging judges with the role and responsibilities of a pro-active case manager. The revised rules of civil procedure transplant into the Polish system a number of case-management solutions already tested in other countries, notably in the US.

Under the new rules, judges are meant to identify and weed out frivolous cases early on. When a suit fails to state a claim or clearly shows that, taking into account the evidence offered, a plaintiff has no real case, the court may dismiss the suit without as much as serving the complaint on the defendant. Similarly, nuisance motions and appeals, especially when filed repeatedly, may be summarily dismissed. Once the initial procedural hurdles are overcome, the court is tasked with organizing the pre-trial and trial into an orderly, efficient process. Judges have the power to hold pre-trial conferences and adopt orders regulating the trial schedule, evidence collection and presentation,

and further motion practice.

The managerial powers of a judge are reinforced with a "procedural stick," or threat of sanctions. When the judge believes that a party (or its attorney) "abuses their procedural rights" he/she may order the culprit to pay a fine, bear the costs of the case regardless of outcome, or pay adverse attorney's fees. Such punitive cost-shifting discretion of the court takes an extra dimension in commercial disputes where a party may be sanctioned for refusing to engage in an alternative dispute resolution process or for failing to participate in the process in good faith.

STREAMLINED CASES

The reformed procedure complements the managerial toolset of a judge with various rules designed to promote a quicker disposition of cases. Professional counsel can opt for electronic, rather than traditional, paper-based service of process. Judges may grant a party motion by referring to the reasons presented in the motion instead of writing routine or repetitive opinions. And the list of orders that parties may immediately appeal, thus bringing the trial-court proceedings to a halt, has been dramatically reduced.

The reform has also had a big impact on the rules of evidence. Sworn affidavits instead of inperson testimonies are now admissible.



By **Radosław Góral**, Counsel, Dispute Resolution Practice, Dentons

Hearings may be held by remote means of communication. And rules on the qualification of experts and preparation of expert opinions have been relaxed. At the same time, parties are required to file evidence motions at the first opportunity; plead such motions with specificity; and engage in robust, pre-trial practice. This creates a greater freedom for both the judge and parties to shape the trial, but requires an increased effort and discipline during the pre-trial stage.

Special, stricter rules apply to disputes between commercial parties. In those, speed of resolution is given priority, recognizing the truth in the old adage that justice delayed is justice denied. As a rule, courts should strive to resolve such matters within six months from the date of the defendant's answer.

But the high-tempo justice comes at a price. In commercial disputes, counterclaims and set-off are both unavailable as defenses and may only be asserted offensively, in a separate lawsuit. A plaintiff must present all arguments and offer all available evidence already in his complaint; and the defendant must do the same when answering. Facts and evidence submitted late are precluded. Moreover, witness testimonies are allowed only as a last-resort, when written evidence proves insufficient to determine the facts of the case. And parties may further limit the types of admissible evidence in a dispute between them by a written agreement.

HIGHER FEES

Another effect of the procedural overhaul is that fighting in Polish courts is more expensive. Filing fees have been raised significantly. Fixed

fees charged in popular commercial disputes were increased. Some actions previously subject to a fixed fee now require payment of a percentage fee. And although the default percentage fee is still a flat 5 percent of the value claimed, such fee is now capped at PLN 200,000, twice the previous maximum. In addition, new fees and charges have been introduced for routine court actions and services (such as preparation of written opinions; issuing witness summons; certifying copies of court documents; etc.) Taken together, the new rules increase the cost of civil disputes, particularly in high-stakes, commercial litigation. The economics of litigation has been altered, with certain types of proceedings likely to be avoided as financially inefficient. In all cases, parties will need to be diligent as a failure to pay a correct, even if small, fee may have serious adverse consequences.

JUDGES RULE

The reform of the Polish rules on civil procedure is nothing short of revolutionary, especially in business-to-business matters. The likely result is a quicker journey to a court decision, but one that requires more vigilance, dexterity and money from the corporate litigant, lest the wheels come off the train to justice. While there are reasons for cautious optimism, how that journey will look like will largely depend on the Polish judiciary, and whether it chooses to use the formidable arsenal of new procedural tools at their disposal with consistent prudence.

The reform of the Polish rules on civil procedure is nothing short of revolutionary, especially regarding business-to-business matters.

AmCham in Warsaw

WELCOME
TO THE
SPOOKY CLUB!

In October, AmCham members turned up at the Champions Sports Bar & Restaurant at Warsaw's Marriott Hotel sporting

horror-themed attires for the Halloween Business Mixer. Great drinks and food accompanied the event which culminated with a

contest for the scariest costume, followed by a raffle. The sponsors were AGS, Gallo wine, Oriflame, and Perla.



1. Dorota Dąbrowska-Winterscheid, AmCham Managing Director; Robert Grader, Warsaw Marriott Hotel. 2. Robert Grader; Tony Housh, AmCham Chairman (Northrop Grumman); Dorota Dąbrowska-Winterscheid. 3. Tony Clarey, individual member; Randy Mott, CHWMEG. 4. Justyna Sekuła, AmCham; Dorota Dąbrowska-Winterscheid. 5. Anita Kowalska, AmCham; Mariusz Paszkiel, the Warsaw Marriott Hotel; Marzena Drela, AmCham. 6. Justyna Mitros, Brown Forman. 7. Lucyna Jaremczuk; Marzena Drela; Elizabeth Asirif; Dorota Dąbrowska-Winterscheid; Zofia Leśniewska, Polityka; Anita Kowalska, AmCham. 8. Richard Żabiński, Focus Research International; Eliza Przędziecka, AmCham; Jan Wojcicki, Focus Research International; Katarzyna Wójcicka, Unum. 9. Magda Pavlak-Chiaradia, AmCham Board Member (ERM); Peter Kwiatkowski, Northrop Grumman; Tony Housh; Michał Szczurba, MP, Civic Coalition; Maja Mazurkiewicz, Alliance 4Europe; Marzena Drela.

GAZING AT THE CRYSTAL BALL

The AmCham's Monthly Meeting in November featured remarks from Bogusław Winid, Advisor to the President of the Republic of

Poland; and a panel discussion on the economic and political outlook for Poland and the EU, including such areas as the impact

of Brexit on the European economy and what lies ahead for Polish-American relations. The venue was the Warsaw Marriott Hotel.



1. Bogusław Winid, Advisor of the President of the Republic of Poland. 2. Tony Housh, AmCham Chairman (Northrop Grumman); Marcin Petrykowski, AmCham Board Member (S&P Global Ratings); Marek Matraszek, CEC Government Relations; Michał Kobosko, Atlantic Council. 3. Dorota Dąbrowska-Winterscheid, AmCham Managing Director; Robert Grader, Warsaw Marriott Hotel; Tony Housh. 4. Tomasz Sękalski, Maciej Kościński, Lidya. 5. Kacper Szczuka, Epstein; Ewa Mróz, American Investor Desk; Tomasz Bieliński, Santander. 6. Stanley Prusiński, Boeing; Jyrki Kujansuu, SAAB Technologies. 7. Michał Kobosko; Marek Szydłowski, AmCham Board Member (Integer). 8. Tim Hyland, FCM Travel Express; Richard Kałużniński, Odgers Berndtson. 9. Witold Śmidowski, Wagony Świdnica; Tony Housh. 10. Tomasz Korkosz, Takeda; Dorota Dąbrowska-Winterscheid. 11. James Katzen; Jacob Foreman, Lockheed Martin Global.

AmCham in Gdańsk

A HIGH POLICY BRIEF

In November, AmCham Gdańsk held a business breakfast with AmCham members in the Pomerania region. The speakers were

Dorota Dąbrowska-Winterscheid, AmCham Managing Director, and Marta Pawlak, Head of Legal and Policy, who talked about AmCham

policy programs aimed at lawmakers and central government. The venue was Courtyard Hotel by Marriott in Gdynia.



Seated at the table on the left: Rafał Stepnowski, CEO Boeing; Katarzyna Czerkies-Laskowska PWC; Piotr Kiszki, Staples; Grzegorz Żebrowski, Miller & Canfield. Seated on the right: Magdalena Suliga, Holiday Inn Gdańsk; Joanna Bojarska-Buchcik, AmCham Gdańsk (HR Solutions Group); Dorota Dąbrowska-Winterscheid; Marta Pawlak; Adam Schroeder, Cushman & Wakefield; Wojciech Kotłowski, KPMG.

AmCham Membership

How to become a Member

The American Chamber of Commerce in Poland is the nation's largest international business organization, representing the interests of more than 300 businesses in a wide range of sectors. They all share one thing in common—they count on AmCham to be their voice in Poland.

Corporate Membership

Corporate membership is open to companies incorporated in the United States, partially owned by US companies, and international companies with a presence in both the US and Poland. The annual fee is PLN 10,000 paid in US\$ according to the NBP's daily average rate.

Advisory Council

Membership is accessible to corporate members interested in joining the advisory body for AmCham's Board of Directors. The annual membership fee is the corporate membership annual fee of PLN 10,000 plus an additional annual fee of PLN 20,000, paid in US\$ according to the NBP's daily average rate.

Individual Membership

Individual membership is available to any US citizen engaged in business in Poland, providing their company or employer is not eligible for corporate membership. Annual fee is PLN 2,000 paid in US\$ according to NBP's daily average rate.

If you're interested in becoming a member, please contact barbara.pocialik@amcham.pl

AmCham in Kraków & Katowice, AmCham Wrocław

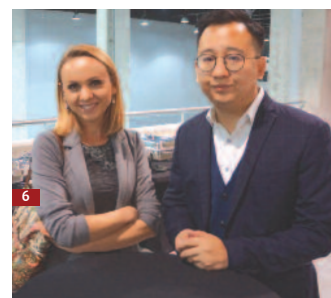
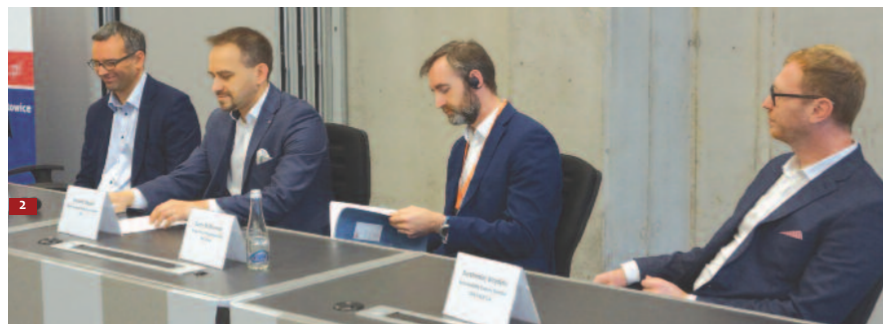
SUSTAINABILITY AND BUSINESS

In November, AmCham Kraków & Katowice and AmCham Wrocław joined forces to integrate the American business community in Opole with a conference devoted

to sustainability and other environmental challenges. The conference was co-hosted by the Opolskie Center for Economic Development. The speakers were Mariusz

Wawer, Governmental Relations Leader at 3M; Barry McDermott, Group Head of Sustainability at PM Group; Bartłomiej Wojdyło, Sustainability Deputy Director at CAN-

PACK; and Krzysztof Drynda, Vice President of the Wałbrzych Special Economic Zone Invest Park. The venue was the Opole Exhibition and Convention Center.



1. Monika Ciesielska-Mróż, AmCham Wrocław Director (PM Group); Mateusz Jurczyk, AmCham Kraków & Katowice. 2. Krzysztof Drynda, WSSE Invest-Park; Mariusz Wawer, 3M; Barry McDermott, PM Group; Bartłomiej Wojdyło, CAN-PACK. 3. Mateusz Jurczyk; Barry McDermott; Mariusz Wawer; Monika Ciesielska-Mróż, Bartłomiej Wojdyło; Krzysztof Drynda. 4. Monika Słomka, PM Group; Monika Ciesielska-Mróż; Magdalena Możdżeń, Marta Dudek, Joanna Mączko, Opolskie Centre for Economic Development. 5. Krzysztof Drynda; Sylwia Borgul; Szczepan Wojdyła, WSEE Invest-Park. 6. Katarzyna Nieściur and Liang (Sunny) Yang, Smart Recycling Plastics. 7. Izabella Ruchniak, Atlas Ward; Bartłomiej Wojdyło; Monika Ciesielska-Mróż.

30 Under 30

IMPACTS BEYOND THE OBVIOUS

In October, the participants of the 30 Under 30 mentoring program held a session with Lisa Glassner from Steelcase (pictured

in the center), who talked about driving engagement in personal networks and extending personal impact beyond business cards

and the social media. The venue was the Warsaw office of MSLGroup.



LEARNING TO HELP THE ONES IN NEED

The 2019 edition of the 30 Under 30 mentoring program ended with the Group's Capstone Project in which the participants (in picture) had to prepare a CSR

project aimed at supporting the Ronald McDonald Foundation. After presentations, participants had their last session of this year's edition with Jason Wor-

ledge, International Republican Institute (in picture, fourth from the right).



AmCham in Kraków & Katowice

THE SCIENCE
OF
PROPULSION

In November, following the celebrations of the 100th anniversary of KLM, AmCham Kraków & Katowice continued its Autumn with Aerospace program with a study trip to Woodward's manufacturing plant in Niepołomice, near Kraków, where the participants had an opportunity to see up close aircraft turbine engines and combustion systems. In addition, the participants learned about the directions of development of the aerospace industry and the role that Woodward plays in design and building processes. The host was Dominik Kania, Managing Director of Woodward in Poland.



1. The "family picture" taken at the end of the Woodward visit. 2. Dominik Kania, Managing Director, Woodward; Mateusz Jurczyk, AmCham Kraków & Katowice. 3. In front of the Woodward facility in Niepołomice. 4. Paweł Gawęda, Dominik Kania, Woodward.

PEOPLE
AT
WORK

In October, AmCham Kraków and Katowice engaged with the Provincial Offices of Silesia and Małopolska over a set of workshops dedicated to training companies in how to effectively process administrative procedures governing the employment of foreigners from outside of the European Union. A session was held at the CAN-PACK office in Kraków and two more sessions were held in Tychy and Opole, which included representatives of the Border Guard in Silesia and the Silesia Provincial Office. In Tychy, AmCham was represented by Jacek Drabik, AmCham Board Member (Motorola Solutions Poland); in Opole by Aleksandra Nowak-Kmieć, HR Manager at Polaris Polska.



1. Szymon Najdychor, CAN-PACK. 2. Aleksandra Nowak-Kmieć, HR Manager at Polaris Polska, speaks at the session in Opole. 3. Jacek Drabik, AmCham Board Member (Motorola Solutions Poland) talks about the hiring needs of the private sector, at the session in Tychy. 4. The session in Tychy in progress. 5. Magdalena Karpisz, Regional Labor Office in Katowice, at the session in Tychy. 6. Captain Przemysław Starczewski, Border Guard in Katowice; Mariusz Dobrzaniecki, Silesian Labor Office, speak at the session in Tychy.

AmCham in Warsaw

CELEBRATING OLD TRADITIONS

Meza Restaurant at the Hilton Warsaw Hotel and Convention Center was the venue for the AmCham Thanksgiving Business Mixer. The food was delicious and

the raffle offered attractive vouchers. The sponsors were AGS, Gallo wine, Forever Living Products, Ori-flame, Pepsico, Peřa, and Whirlpool.



1. Dorota Dąbrowska-Winterscheid, AmCham Managing Director; Yair Neamlich, Hilton Warsaw Hotel. 2. Yair Neamlich; Tony Housh, AmCham Chairman (Northrop Grumman). 3. Dorota Dąbrowska-Winterscheid; Tony Housh; Agnieszka Kosowska, Roche; Alain Bobet, AmCham Individual Member, Anna Bobet. 4. Jolanta Tourel, AmCham Individual Member; Rafał Zawierucha; Marzena Drela, AmCham Deputy Director. 5. Jarosław Maślanka, Pegasystems; Dorota Dąbrowska-Winterscheid; Marcin Nowak, ABSL. 6. Janusz Przeorek, Express Map; Joanna Klupp, Forever Living Products; Marzena Drela. 7. Ewa Andrukiewicz, ELLA; Marcin Czyża, Warmia-Mazury Special Economic Zone (American Investor Club). 8. Kinga Motyka, Ian Yoo, Universal Express; Małgorzata Skonieczna, Pepsi-Cola. 9. A raffle lucky winner Andrzej Davis, ACS. 10. Karolina Szymczak, Whirlpool; Marta Kurowska, Lufthansa Group.

AmCham Kraków & Katowice

A THANKSGIVING TIME WITH ABT

In November, AmCham Kraków and Katowice celebrated Thanksgiving with a traditional Thanksgiving dinner and networking. At the same occasion the partici-

pants celebrated the 10th anniversary of the event sponsor, Accent Business Training, who presented their new visual identification, including its new logo,

for the first time. The venue was Radisson Blu Hotel in Kraków.



1. Patrick T. Slowinski, Consul General, US Consulate General in Kraków; Agata Cielarska, Accent Business Training. 2. Monika Madoń, Agata Cielarska, Accent Business Training; Mateusz Jurczyk, AmCham Kraków & Katowice. 3. Jarosław Maślanka, Pegasystems; Katarzyna Lynch, John Lynch, Lynka. 4. Patrick T. Slowinski; Christian Cardona, US Consulate General Kraków; John Held, Accent Business Training. 5. Agata Cielarska; Sławomir Kumka, IBM; Monika Madoń. 6. John Held; Gabriel Buchała, APTIV. 7. The meeting in progress. 8. Thanksgiving turkey in the making.

30 Under 30

MOLDING YOUNG TALENT

The 2019 edition of the AmCham 30 Under 30 leadership development program culminated in December with a diploma handing-out celebration. The par-

ticipants of the last year's edition represented a wide array of AmCham member companies, including Amgen, Aptiv, Badger, Brown-Forman, CEC Government

Relations, C.H. Robinson, Cisco, Citi Handlowy, Direct Communication, Egon Zehnder, ERM Polska, Google, Greenberg Traurig Grzesiak, Hewlett Packard, Interna-

tional Paper, Johnson & Johnson, K&L Gates (DWF), Mastercard, McDonalds, Moneygram, MSL Group, Pfizer, Ramboll and UPS. The venue was CulinaryON in Warsaw.



1. John Armstrong, US Embassy. 2. The Graduation Ceremony "family photo". 3. Krzysztof Kłapa, Ronald McDonald Foundation. 4. Dorota Dąbrowska-Winterscheid, AmCham Managing Director; Jason Worlledge, International Republican Institute. 5. Mateusz Jurczyk, AmCham Kraków & Katowice; Magda Biernat, Ramboll; Magdalena Koczkowska, Pfizer; Paulina Stawicka, Brown-Forman; Agnieszka Śpionek, Mastercard; Krzysztof Kłapa. 6. Olga Antecka, MSL; Anna Smolak, Johnson & Johnson; Ilona Kosno, Citi; Mateusz Wiewiór, C.H. Robinson; Ozan Koca, Moneygram.

AmCham Kraków & Katowice

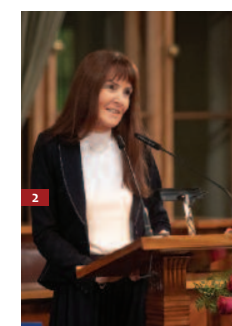
ENTREPRENEURS RALLY FOR CHARITABLE CAUSE

The 2019 edition of Hoover Table, a charity program designed to help under-privileged children from day-care facilities in Kraków get access to English language

training, culminated with two separate diploma celebrations, for program sponsors and program beneficiaries. Hoover Table is conducted by AmCham, to-

gether with the US Consulate General in Kraków, and the City of Kraków, in cooperation with a range of institutions. The sponsors of the 2019 edition were

APTIV, CANPACK, GE Healthcare, Holiday Inn Kraków City Center, Motorola Solutions, Sheraton Grand Kraków and Pegasystems.



1. The beneficiaries of the Hoover Table program with US consul and sponsors. 2. Anna Korfel-Jasińska, Deputy Mayor of Kraków. 3. Patrick T. Slowinski, US Consul General in Kraków. 4. Anna Dymna, charity activist. 5. Iwona Sadecka, US Consulate General in Kraków. 6. Patrick T. Slowinski and Anna Korfel-Jasińska perform their duty. 7. Dorota Adamska, BP; Jacek Drabik, AmCham Board Member and AmCham Kraków & Katowice Director (Motorola Solutions Poland); Beata Sabatowicz, Kraków Mayor's Office; Anna Zemła, GE Healthcare; Jarosław Maślanka, Pegasystems; Iwona Sadecka; Mateusz Jurczyk, AmCham Kraków & Katowice. 8. The sponsors of the second edition of the Hoover Table program.

AmCham Kraków & Katowice

SEASON’S GREETING
FROM AMCHAM
IN KRAKÓW...

In December, AmCham held a Xmas reception in Kraków. The guests of honor included Deputy Mayor of Kraków Jerzy Muzyk, US Consul General in Kraków

Patrick T Slowinski, and Vice-Rec-tor for General Affairs at Kraków University of Technology Prof. Andrzej Białkiewicz. The sponsors of the event were International

Paper GBS, GE Healthcare, Max-ima Europe and Pegasystems. The venue was the Sheraton Grand Kraków.



1. Jacek Drabik, AmCham Board Member and AmCham Kraków & Katowice Director (Motorola Solutions Poland); Mateusz Jurczyk, AmCham Kraków & Katowice; Marzena Drela, AmCham Deputy Director. 2. Jerzy Muzyk, Deputy Mayor of Kraków. 3. Patrick T. Slowinski, US Consul General in Kraków, Jerzy Muzyk, Marzena Drela. 4. Jacek Drabik; Marzena Drela; Jacek Kasz, Kraków University of Technology. 5. Prof. Maria Żychowska, Prof. Andrzej Białkiewicz, Kraków University of Technology; Patrick T. Slowinski; Jacek Kasz; Jacek Drabik. 6. Emilia Kopacz, GE; Sławomir Kumka IBM; Anna Zemła, GE. 7. Mateusz Jurczyk; Marcin Nowak, ABSL; Marzena Drela; Jacek Legendziewicz, Jordan; Jerzy Muzyk; Jarosław Maślanka, Pegasystems. 8. Ewelina Moniczewska-Rybka, Maxima Europe; Brian Russel, State Street; Patrick Jamal, Joanna Grabowska, Annie Manukyan, Peter Ticoalu, Maxima Europe.

...AND
KATOWICE

In December, AmCham held its first Christmas Business Mixer in Katowice. The venue was the Inter-national Convention Center MCK. The event was sponsored by the

Katowice Special Economic Zone and other major international chambers of commerce in Poland, while the City of Katowice took patronage over the event.



1. Janusz Michałek, Katowice Special Economic Zone. 2. Mateusz Jankowski, City of Katowice. 3. Andrzej Trela, Polish Confederation Lewiatan; Anita Imbre, Polish-Romanian Bilateral Chamber of Commerce and Industry; Lars Gutheil, Polish-German Chamber of Commerce and Industry; Elisabetta Caprino, Italian Chamber of Commerce and Industry in Poland; Bartosz Siepracki, Enterprise Ireland; Mateusz Jurczyk AmCham Kraków & Katowice. 4. Andrzej Trela, Polish Confederation Lewiatan; Bernard Szatkowski, Janusz Mazur, Takenaka. 5. Elżbieta Duraj, Polish-German Chamber of Commerce and Industry; Zbigniew Majtyka. 6. Mateusz Jankowski; Franco Lo Monaco. 7. Networking in progress.

AmCham Annual General Meeting

CLOSING ANOTHER
BUSY YEAR

AMCHAM HOSTED US AMBASSADOR TO POLAND GEORGETTE MOSBACHER AND ROBERT NOWICKI, UNDERSECRETARY OF STATE AT THE MINISTRY OF DEVELOPMENT, AT THE CHAMBER'S 2019 ANNUAL GENERAL MEETING AND CHRISTMAS RECEPTION. THE EVENT TOOK PLACE AT THE WARSAW MARRIOTT HOTEL AND WAS ATTENDED BY OVER 150 MEMBERS. CITI AND CITI HANDLOWY SPONSORED THE RECEPTION.



1. Georgette Mosbacher, US Ambassador to Poland. 2. Sławomir Sikora, AmCham Board Member (Citi). 3. Tony Housh, AmCham Chairman (Northrop Grumman); Georgette Mosbacher; Robert Nowicki, Undersecretary of State at Ministry of Development; Sławomir Sikora. 4. Georgette Mosbacher; Tony Housh. 5. Sławomir Sikora; Georgette Mosbacher. 6. Łukasz Kowalski, MSL Group; David Debenedetti, Debenedetti Majewski Szczęśniak. 7. John Armstrong, US Embassy; Tony Housh, Sławomir Sikora; Ambassador Georgette Mosbacher; Robert Nowicki. 8. Dorota Dąbrowska-Winterscheid, AmCham Managing Director; Sławomir Sikora. 9. Jarosław Grzesiak, Greenberg Traurig; John Lynch, AmCham Board Member (Lynka). 10. The meeting in progress. 11. Łukasz Dominiak, Animex; Dorota Dąbrowska-Winterscheid; Andrzej Pawelczak, Animex; Mirosław Dackiewicz, Agri Plus. 12. Sławomir Zygowski, General Electric; Rafał Stepnowski, Jeppesen. 13. Jacek Siwicki, Enterprise Investors; Sławomir Sikora. 14. Agnieszka Kępińska, Mondelez; Marzena Drela, AmCham Deputy Director. 15. Beata Pawłowska, Oriflame; Dorota Dąbrowska-Winterscheid; Marek Szydlowski, AmCham Board Member (Integer). 16. Katarzyna Obuchowicz, Brown Forman; Marta Pawlak, AmCham. 17. Jacek Czerniak, Citi Handlowy; Marzena Drela; Mirosław Dackiewicz, Agri Plus. 18. The AmCham Staff. 19. Tony Housh; Jolanta Jaworska, AmCham Board Member (IBM); Dorota Dąbrowska-Winterscheid; Marek Sowa, Golf Channel. 20. Tony Clarey, AmCham Individual Member; Tony Housh, Stanley Urban, AmCham Individual Member.



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AmCham in Wrocław

A GOOD START TO
THE HOLIDAY
SEASON

AMCHAM, TOGETHER WITH THE BRITISH POLISH CHAMBER OF COMMERCE (BPCC), AND THE POLISH-GERMAN CHAMBER OF COMMERCE AND INDUSTRY (AHK) HELD THE ANNUAL INTERNATIONAL CHRISTMAS EVENING TO MARK THE BEGINNING OF HOLIDAY SEASON CELEBRATIONS. THE VENUE WAS THE SOFITEL WROCLAW OLD TOWN.



1. The 3M team: Dominika Kawała; Piotr Andrzejczak; Tomasz Duda; Marek Krajanowski; Anthony Crawford; Monika Ciesielska-Mróż, AmCham Wrocław (PM Group); Mariusz Wawer; Ewa Jaxa; Radosław Daczyński; Emilia Demczur. 2. Leszek Patrzek, Business & Tax Attorneys; Monika Ciesielska-Mróż. 3. Monika Ciesielska-Mróż; Piotr Suwała, Jan Wójcicki, Focus Research International. 4. Joanna Szablewska, Klaudia Brykajło, Hewlett Packard Enterprise Global Business Center; Sławomir Kiedos, Mphasis; Adrian Węclawski, Manpower; Andrzej Modrzyk, Adient. 5. Iwona Święch-Olender, the Lower Silesia Chapter of the Business Center Club; Barbara Kaśnikowska, RyanAir. 6. Timea Balzer, The Bridge Wrocław MGallery Hotel; Matthias Herd, DoubleTree by Hilton Wrocław; Andrzej Kleeberg, Sofitel Wrocław Old Town Hotel. 7. Katarzyna Turkiewicz, Hewlett Packard Enterprise Global Business Center; Monika Ciesielska-Mróż. 8. The reception in progress. 9. Andrzej Modrzyk; Michał Dądajewski, PM Group; Monika Ciesielska-Mróż; Monika Słomka, PM Group; Tomasz Poznań, A123 Systems. 10. Paulina Lenda's Christmas live show.



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AmCham in Gdańsk

SEASON'S GREETINGS FROM AMCHAM GDAŃSK!

In December, the members and friends of AmCham Gdańsk celebrated the beginning of the Christmas season at a mixer held at the Sheraton Hotel by Marriott

in Sopot, which was the partner of the event. The gifts for the raffle were sponsored by Mary Kay, Pepsico, HR Solutions Group, Forever Living Products.



1. Barbara Pocialik, AmCham; Iwona Modrzejewska, Thomson Reuters; Joanna Bojarska-Buchcik AmCham Gdańsk (HR Solutions Group). 2. Joanna Bojarska-Buchcik; Barbara Pocialik; Artur Zawadzki, Sheraton Sopot. 3. Katarzyna Czerkies-Laskowska, PWC; Karolina Biesek, Flex; Artur Gronkiewicz, Sony; Aneta Muskała International Paper. 4. The mixer in progress. 5. Małgorzata Gawron, Karol Brzeńkiewicz, Radisson Blu; Artur Zawadzki.



June 4, 2020

USA—CEE

New York



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"A Celebration of Trans-Atlantic Investments & Relationships with Central Eastern Europe"

- 200+ Attendees
- VIP Jury of 30 US-based Companies Executives
- 12 Nominations Categories for North American companies Invested in CEE:

- Top Business Services Investor in CEE
- Top Aviation/Space/Defense Partner
- Top Automotive, Transportation or Mobility Investor
 - Top Manufacturing Investor
- Top City/Region in CEE for North American Investors
- Top CSR Initiative (U.S. to CEE)
- Best Employer in CEE
- Most Innovative U.S. Company in CEE
- Top Commercial Real Estate Investor in CEE
- Top Technology/Digital/Software (X-Tech) Company in CEE
- Top Energy Partner in CEE
- Top Medical/Lifesciences/Pharma Company in CEE

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