

Wake Up Call

Ernst & Young
Portuguese Attractiveness
Survey 2010

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Main results of the study

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Methodology

204 international business leaders were interviewed by phone (CATI system) between the **26th of February and the 15th of March 2010**.

The parent nationalities of the companies of the sample are representative of investments in Europe (according to the EIM database) › quotas of the companies country of interview.

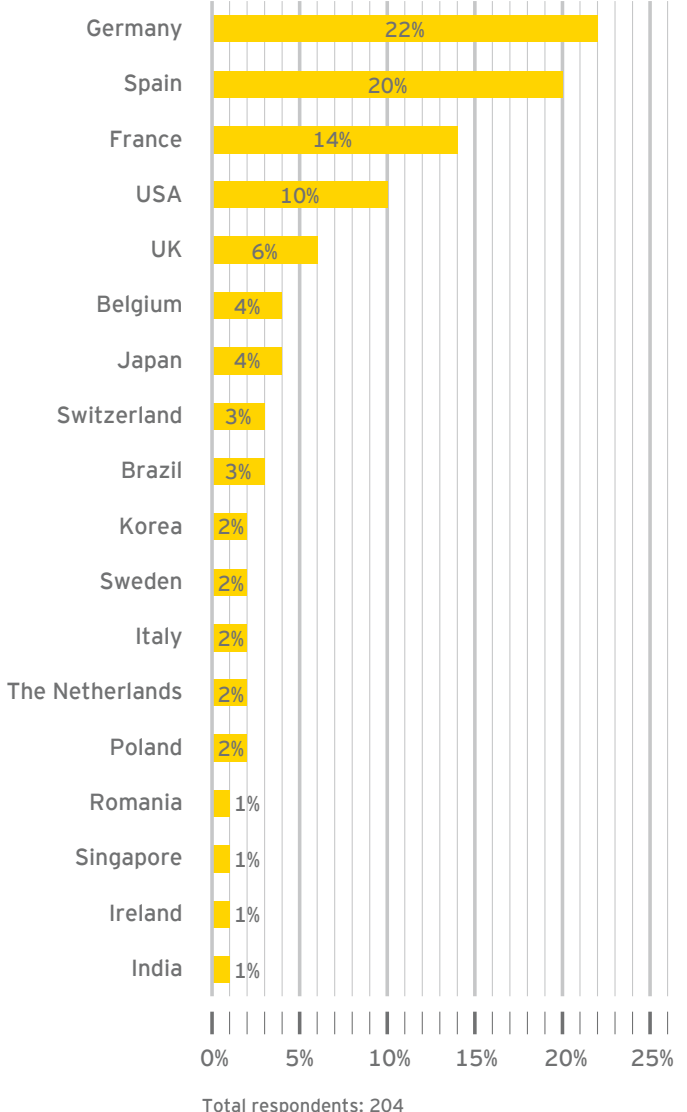
Business leaders have been interviewed in **22 countries in 5 languages**: German, English, Spanish, Portuguese and French.

Wherever possible, the results will be compared to those observed in April 2008 or April 2009.



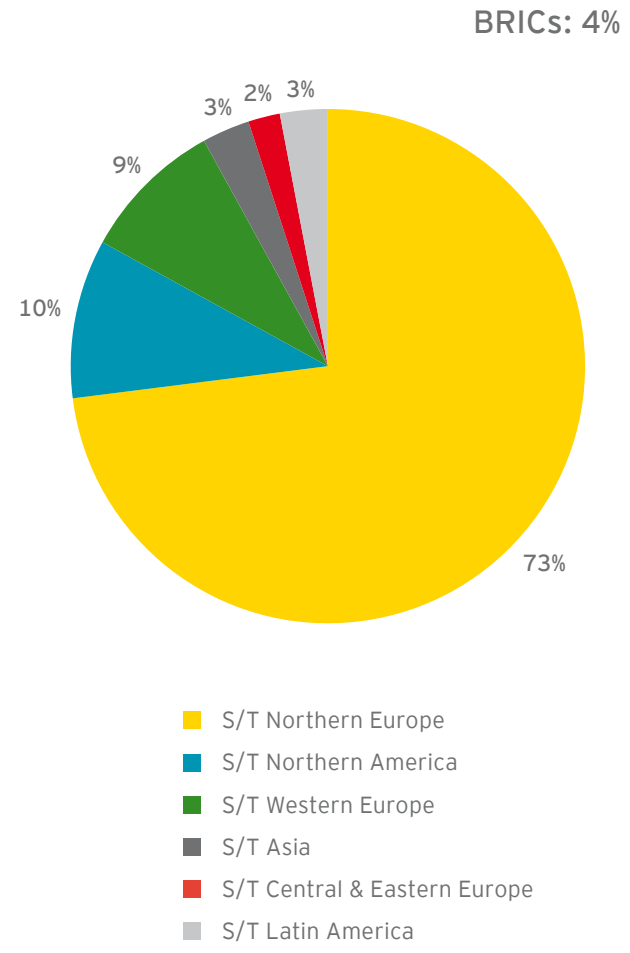
Sample Scope

Nationality of the Interviewed Companies

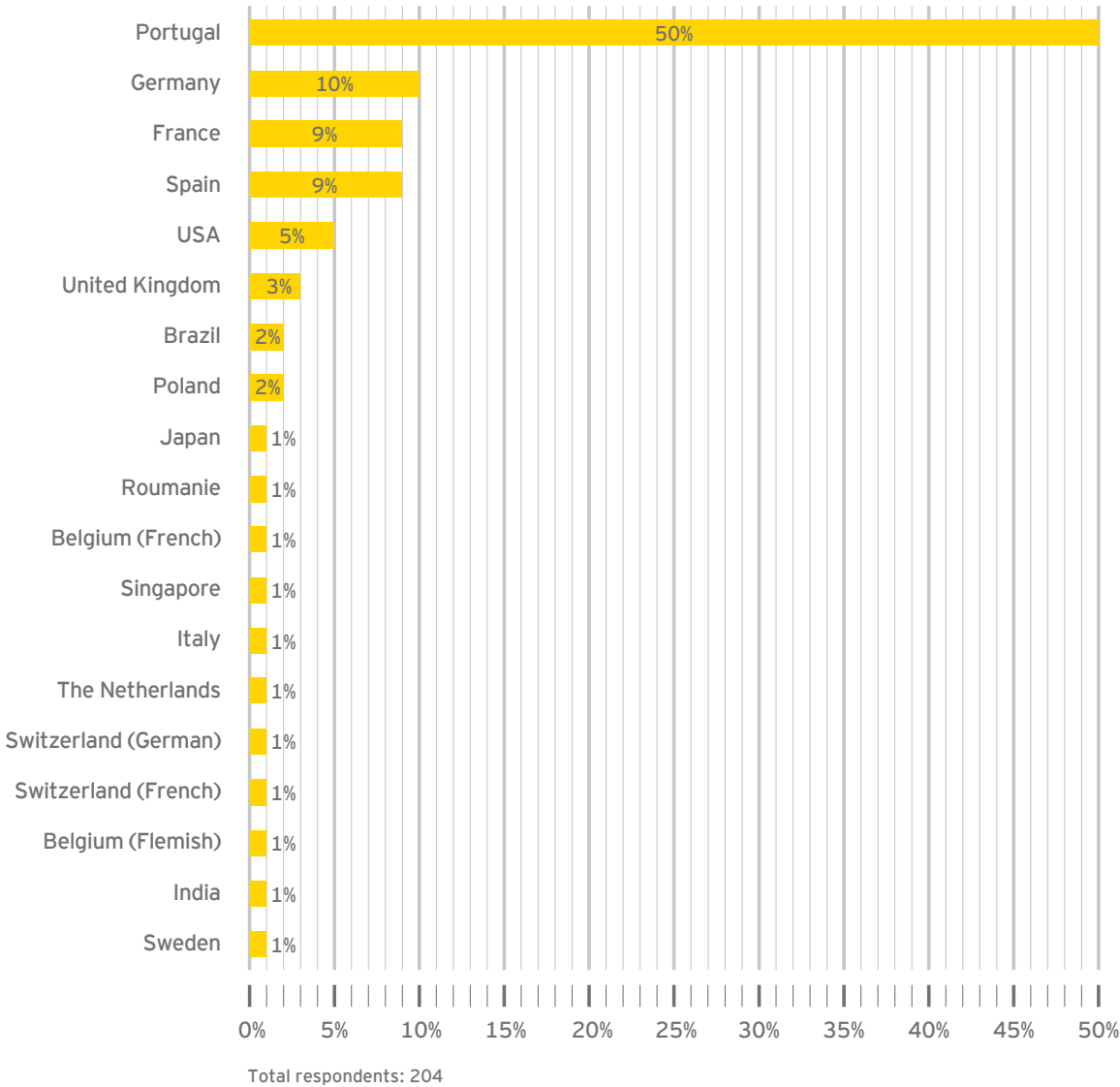


And also (≤1)

China	<1%
Hungary	<1%

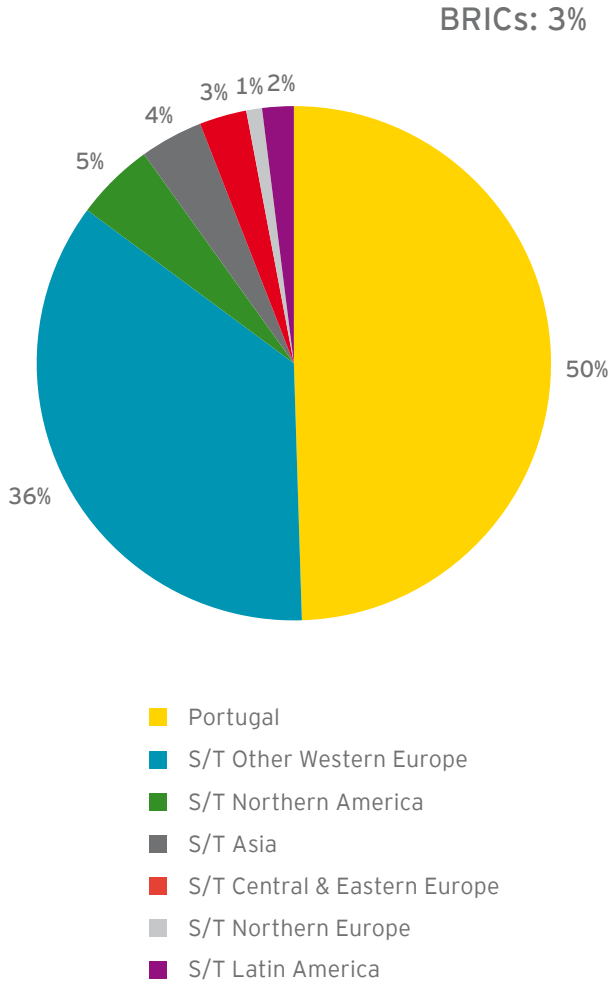


Location of the Interviews



And also

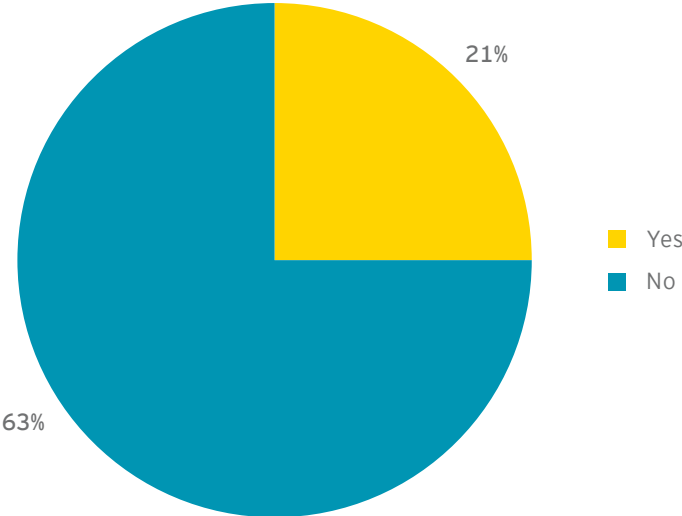
Hungary	<1%
Ireland	<1%
China	<1%



Non Portuguese Companies in Portugal

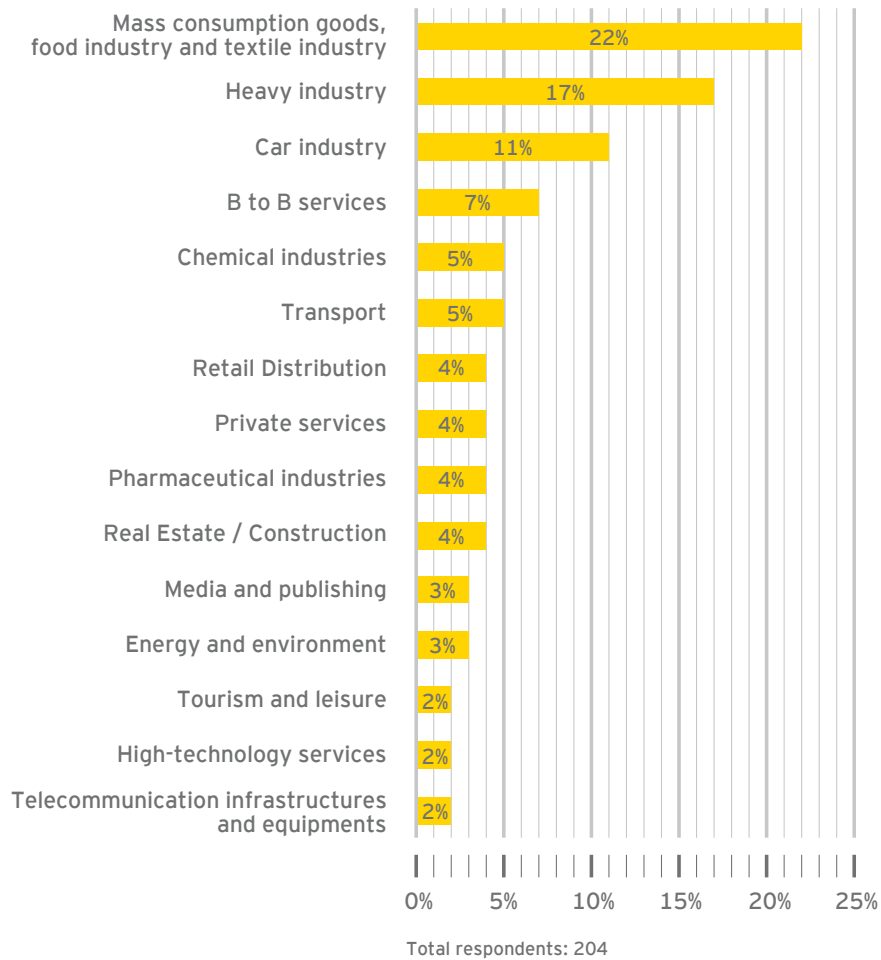
Has your company established activities in Portugal?

Globally, out of the 204 interviewed companies, 62% are present in Portugal



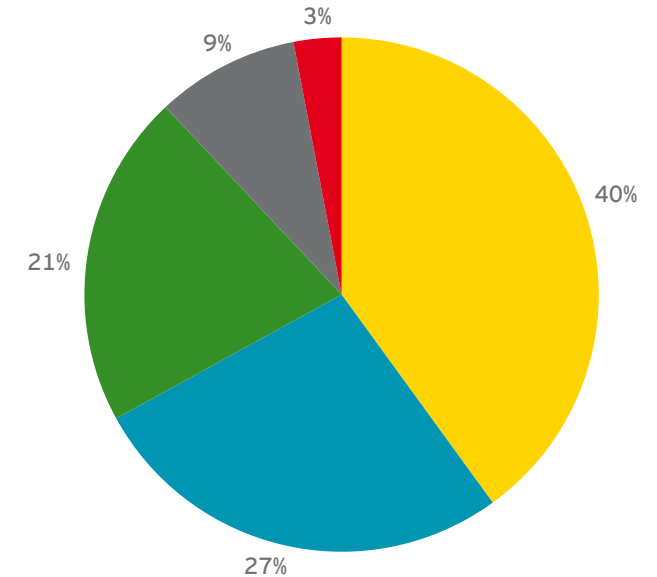
Respondents: 102 interviewees outside Portugal

Sector of Activity of the Interviewed Companies



And also

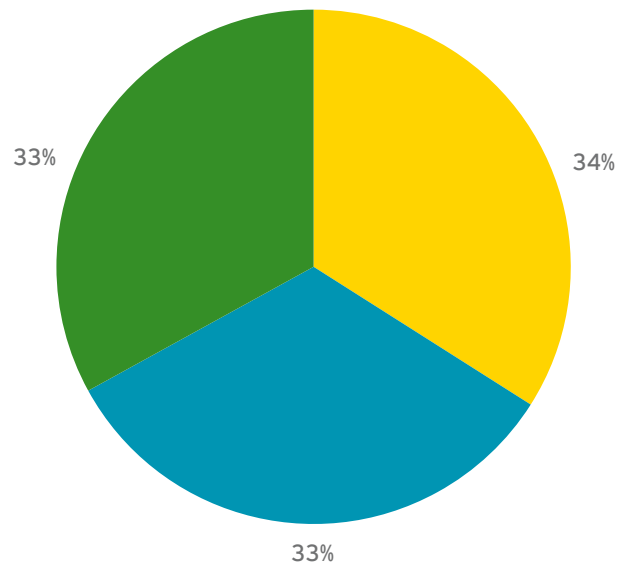
High-technology equipment	1%
Banking, Finance, Insurance	1%
Telecommunication services	1%



- Industry, Automotive, Energy
- Consumer
- Private & Business services
- Chemical & Pharmaceutical industries
- High-tech & telecommunication infrastructures and equipments

Size of the Company & Job Title

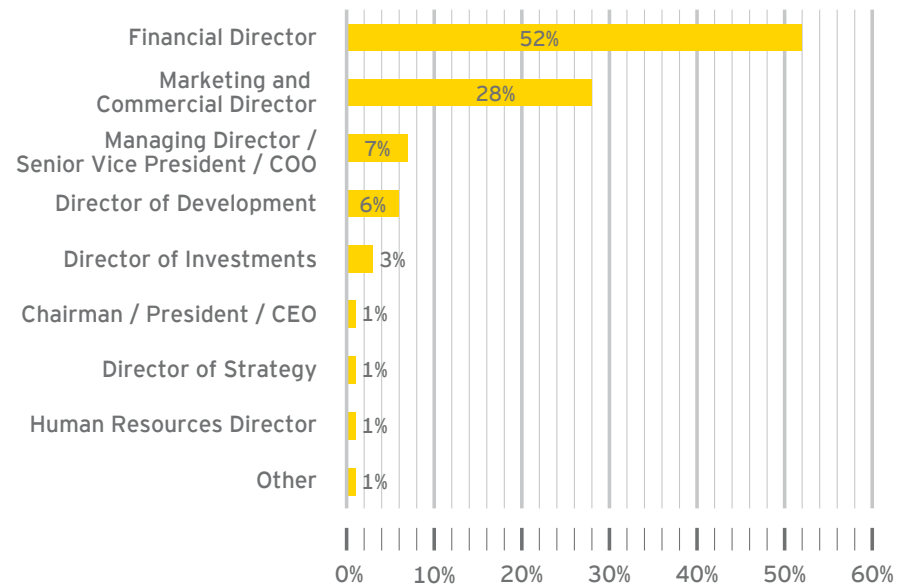
Size of the company (sales turnover)

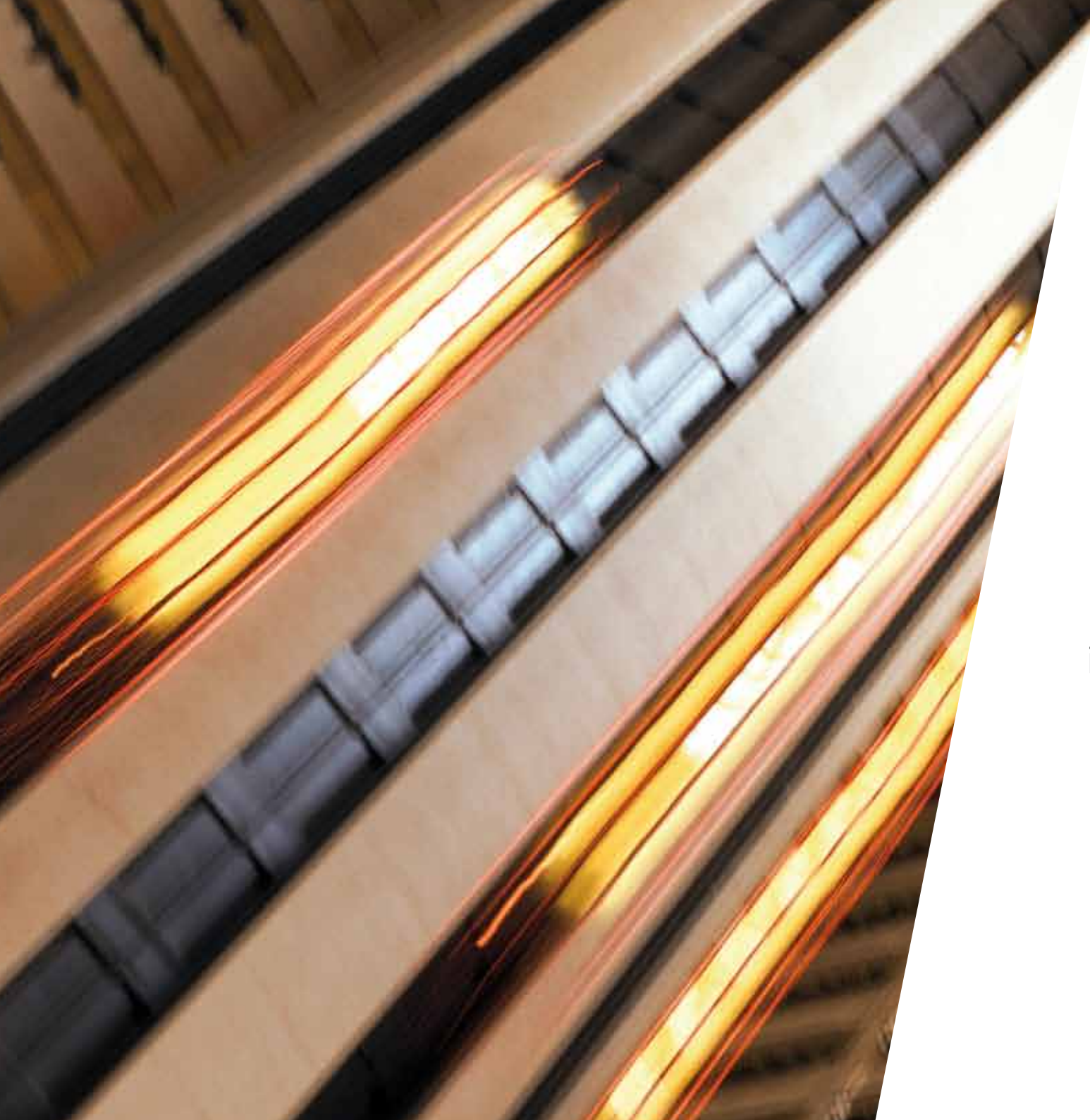


- More than 1,5 Billion euros
- Less than 150 Million euros
- From 150 Million to 1.5 Billion euros

Total respondents : 204

Job title of the interviewees

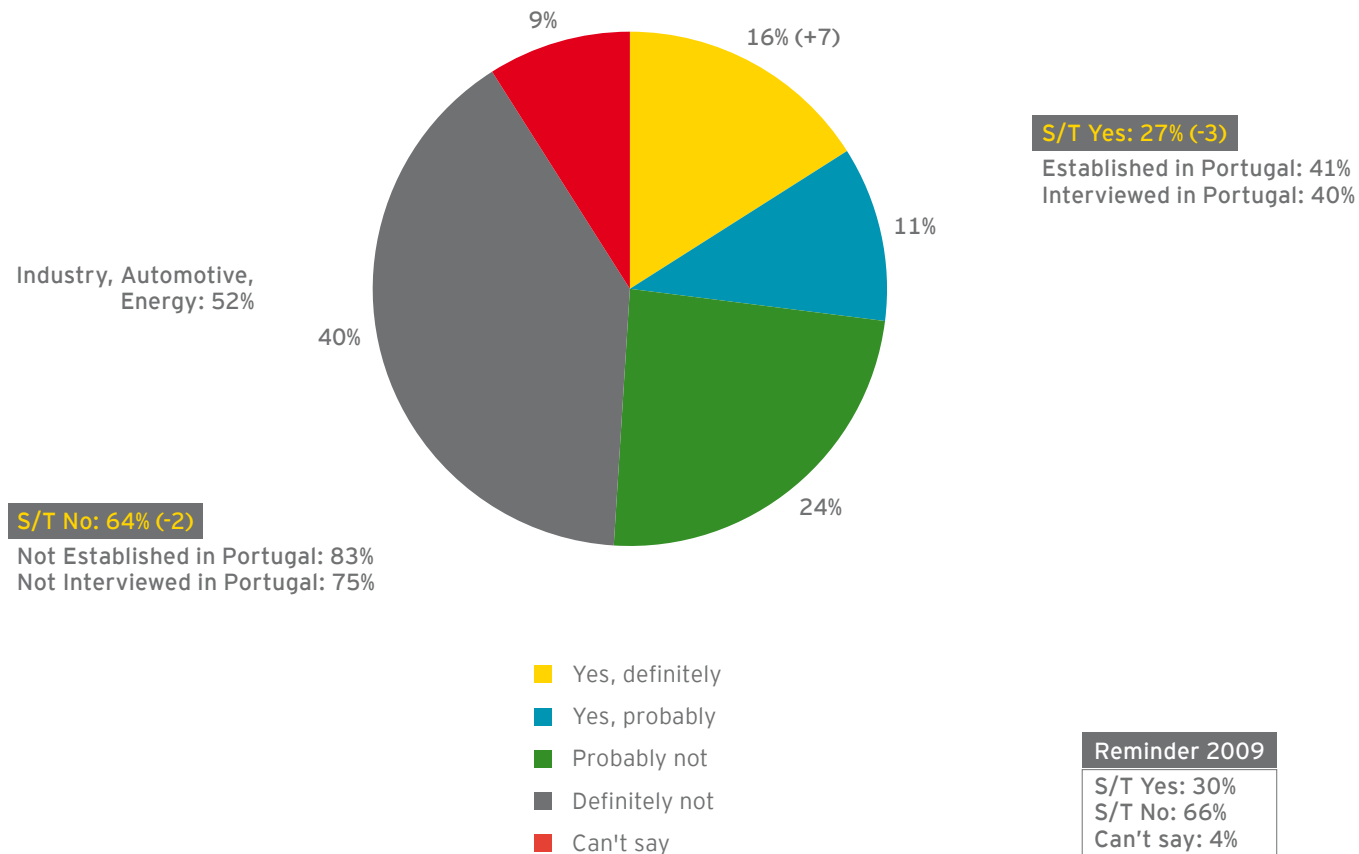




I.
Foreign investments
in Portugal

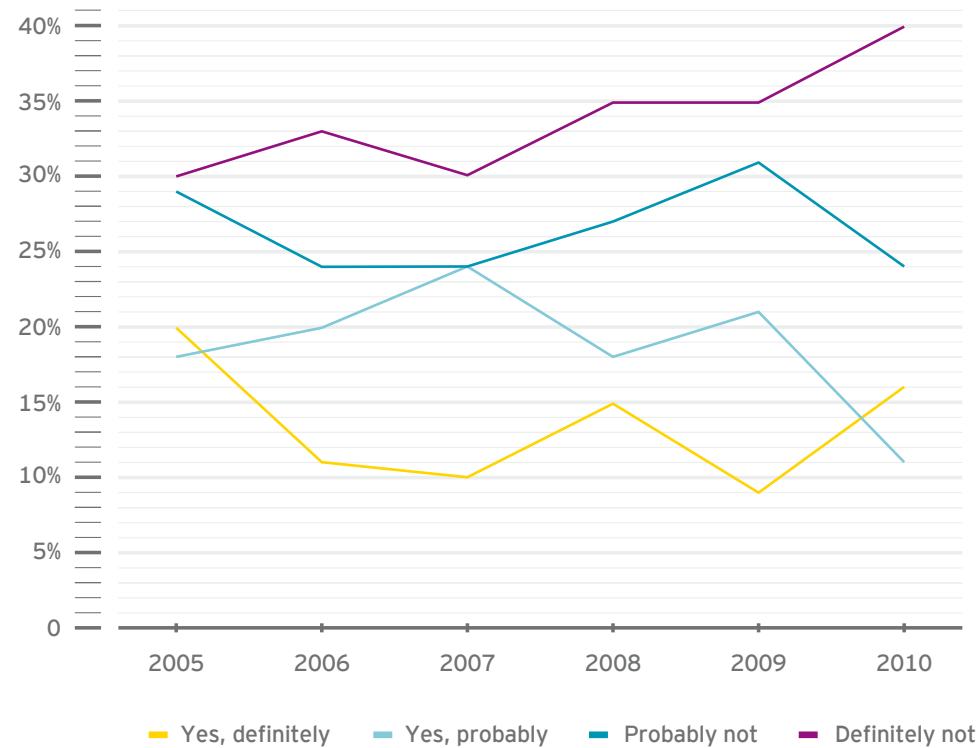
A stable intention of establishing or developing activities in Portugal

In general, is your group considering establishing or developing activities in Portugal?



...but more assertive

S/T Yes	38%	31%	34%	33%	30%	27%
S/T No	59%	57%	54%	62%	66%	64%



...especially to develop activities

In general, is your group considering establishing or developing activities in Portugal?

	Total	Interviewed in / out		Size of the company-sales turnover			Sector of activity of the company		
		Inter in Portugal	Inter out Portugal	<150 Million euros	From 150 Million euros to 1,5 Billion euros	>1,5 Billion euros	S/T Private & Business services	S/T Industry Automotive Energy	S/T Consumer
Base	204	102	102	67	67	69	42	82	55
S/T Yes	27%	40%	13%	27%	22%	31%	30%	24%	24%
Yes, definitely	16%	27%	4%	13%	15%	19%	19%	13%	18%
Yes, probably	11%	13%	9%	14%	7%	12%	11%	11%	6%
S/T No	65%	54%	75%	67%	70%	57%	63%	65%	65%
Probably not	24%	19%	29%	22%	33%	18%	30%	13%	35%
Definitely not	40%	35%	46%	45%	38%	39%	33%	52%	30%
Can't say	9%	5%	12%	7%	7%	12%	7%	11%	11%

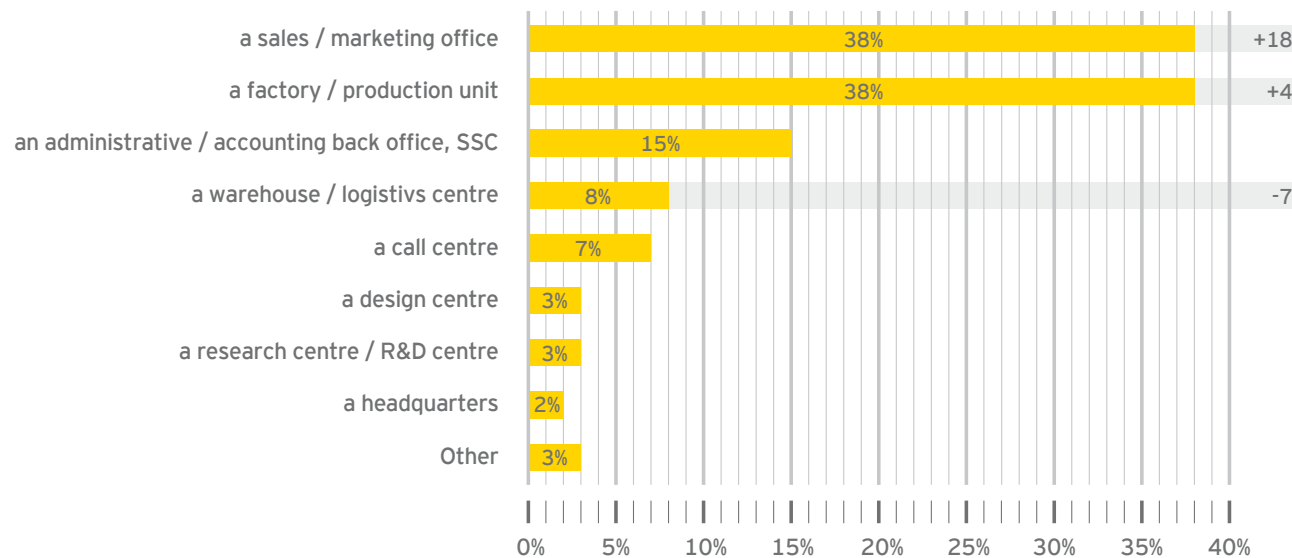
Total respondents: 204

As in 2009, main investments are focus on sale and manufacturing

What is the main type of direct investment your group is planning in Portugal?

Are you planning to establish or develop...?

Several possible answers, total >100%

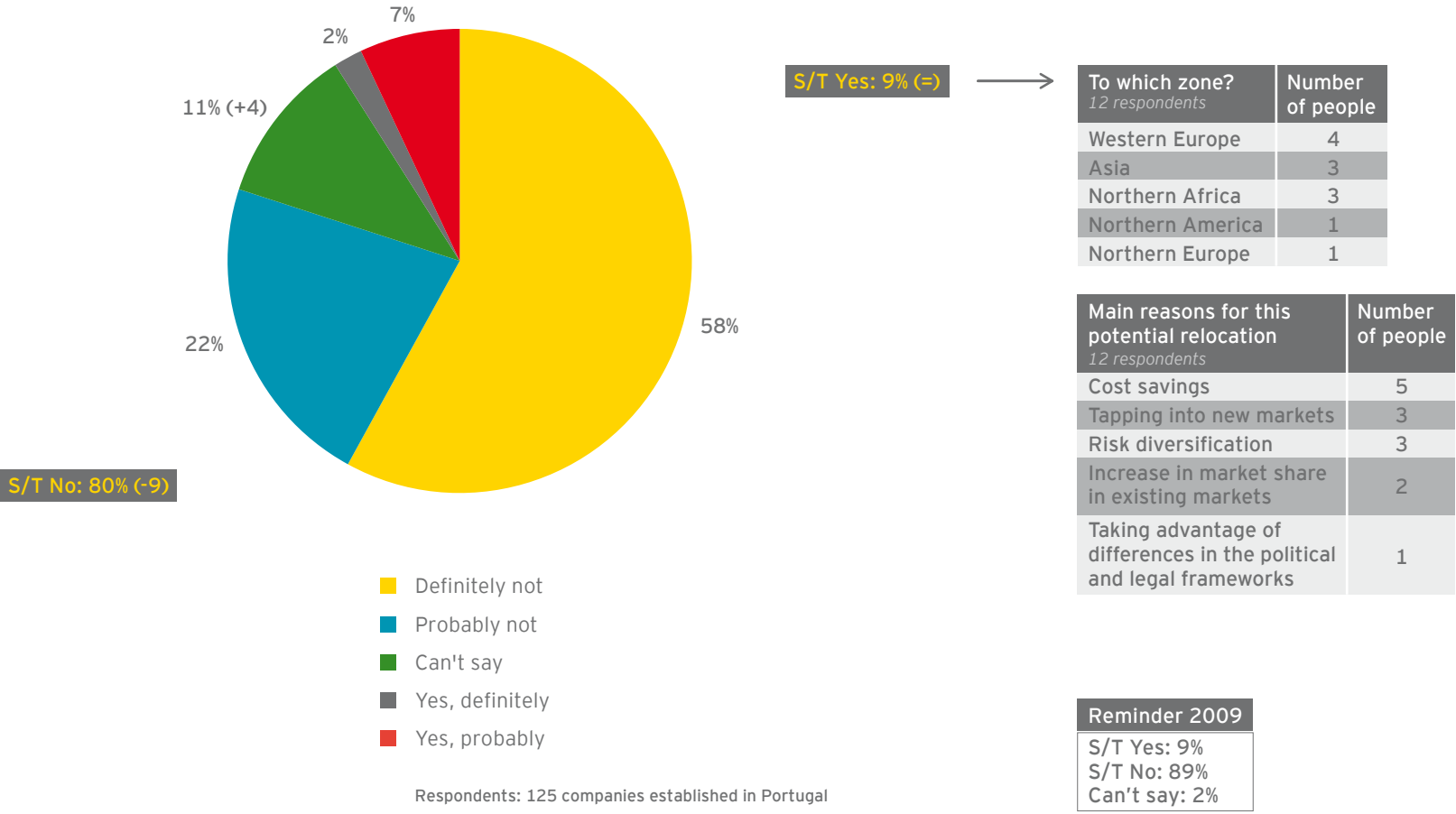


Reminder 2009
 Manufacturing: 34%
 Sales & marketing office: 20%
 M&A: 20%
 Warehouse / Logistics Center: 15%

Respondents: 57 considering establishing or developing activities in Portugal

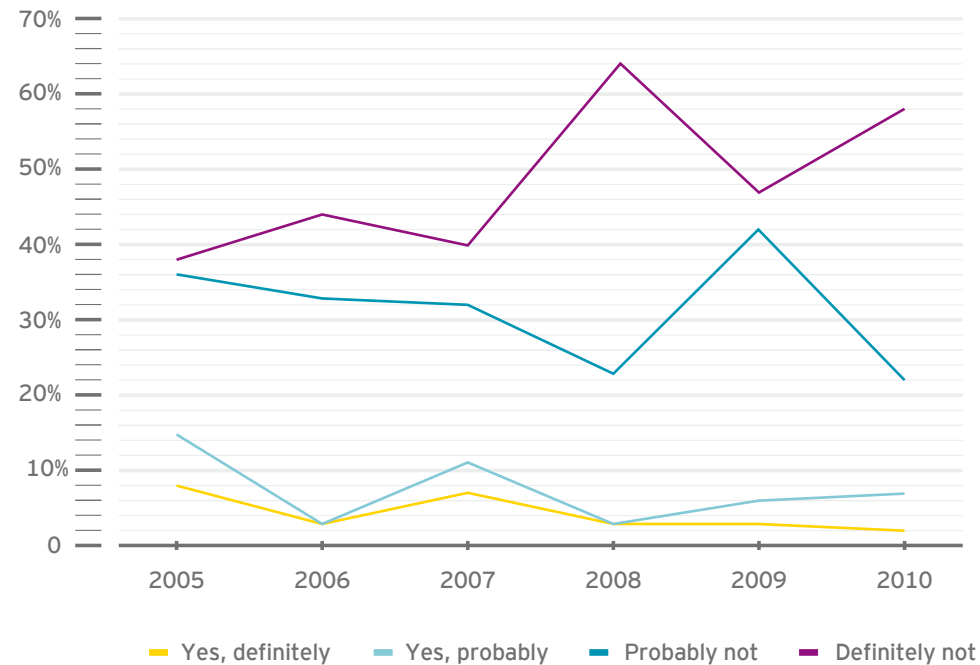
Relocation out of Portugal similar to 2009

Is your group considering relocating part of its activities from Portugal to another country?



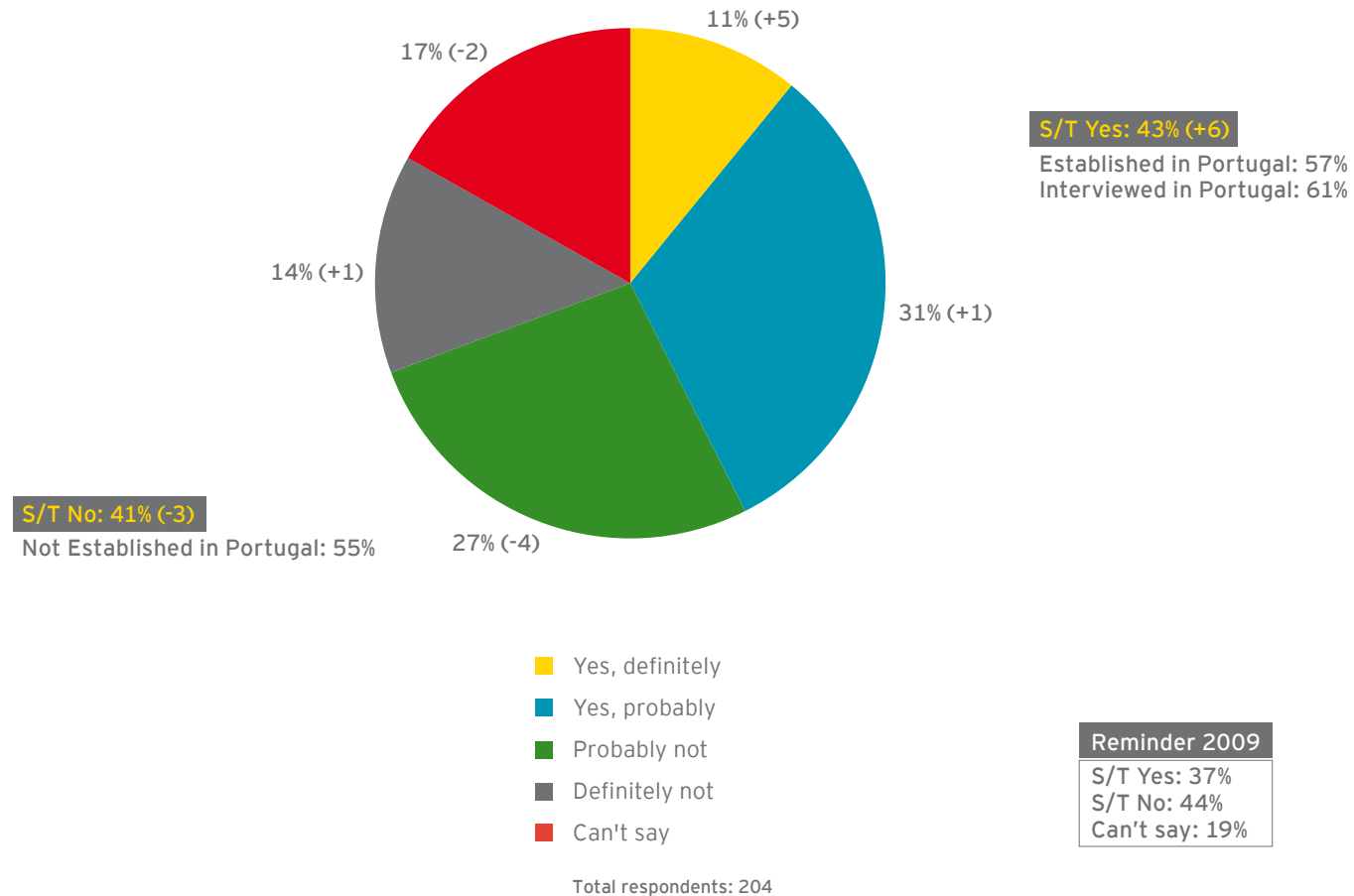
...with a more assertive non intention to relocate

S/T Yes	23%	6%	18%	6%	9%	9%
S/T No	74%	77%	72%	87%	89%	80%
Can't say	3%	17%	10%	7%	7%	11%



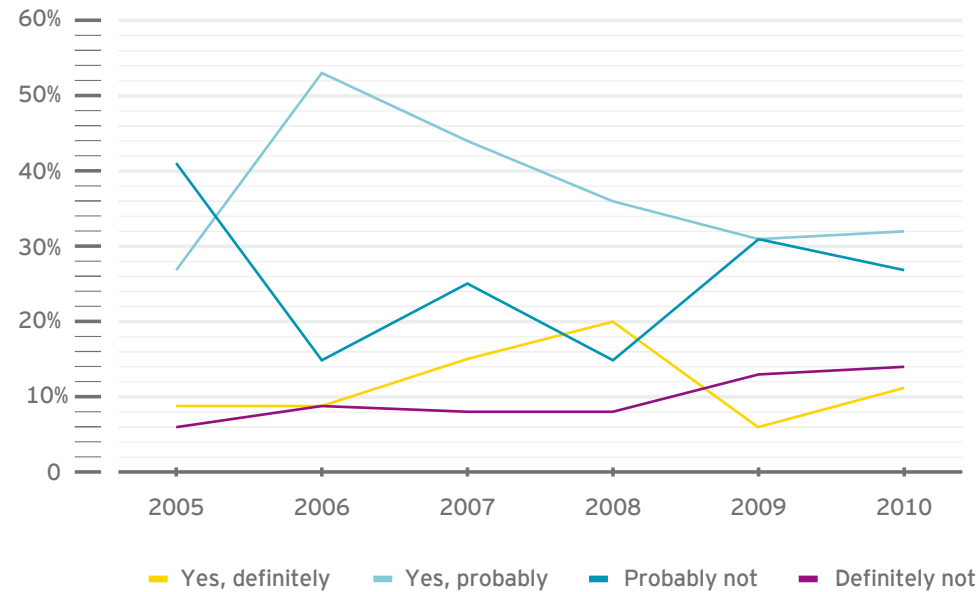
After dropping in 2009, Portugal's current attractiveness policy provides more incentive...

Do you think Portugal currently implements an attractiveness policy that incites international investors?



...returns to positive, but still below 2008

S/T Yes	36%	61%	59%	56%	37%	43%
S/T No	47%	24%	33%	23%	44%	41%
Can't say	17%	15%	8%	20%	19%	17%



A stronger attractiveness for investors established in Portugal and industry, automotive & energy sector

Do you think Portugal currently implements an attractiveness policy that incites international investors?

	Total	Interviewed in / out		Size of the company-sales turnover			Sector of activity of the company		
		Inter in Portugal	Inter out Portugal	<150 Million euros	From 150 Million euros to 1,5 Billion euros	>1,5 Billion euros	S/T Private & Business services	S/T Industry Automotive Energy	S/T Consumer
Base	204	102	102	67	67	69	42	82	55
S/T Yes	43%	61%	25%	37%	48%	44%	28%	46%	41%
Yes, definitely	11%	19%	3%	5%	12%	17%	7%	18%	5%
Yes, probably	32%	41%	22%	32%	37%	26%	20%	28%	36%
S/T No	41%	35%	47%	52%	37%	34%	51%	42%	40%
Probably not	27%	23%	30%	36%	20%	23%	40%	22%	25%
Definitely not	14%	11%	17%	15%	16%	11%	11%	19%	15%
Can't say	17%	5%	28%	12%	15%	22%	21%	13%	19%

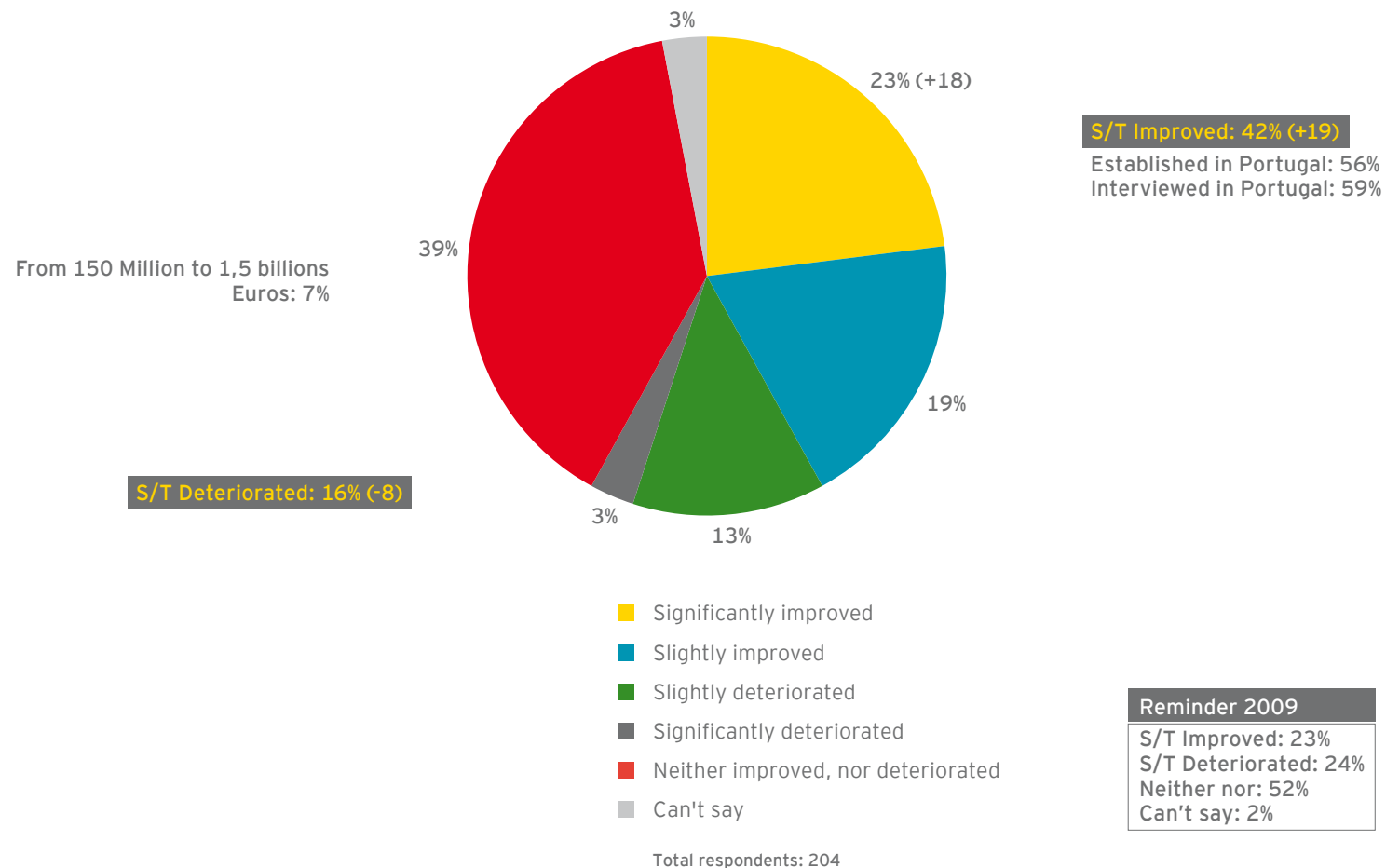
Total respondents: 204



II. Strengths and weaknesses

International investors are more optimistic on the capacity of Portugal to rebound from the crisis

Over the past year has your perception of Portugal as a location where your company might establish or develop activities...?



The perception of Portugal improved significantly...



...especially with investors already established in Portugal

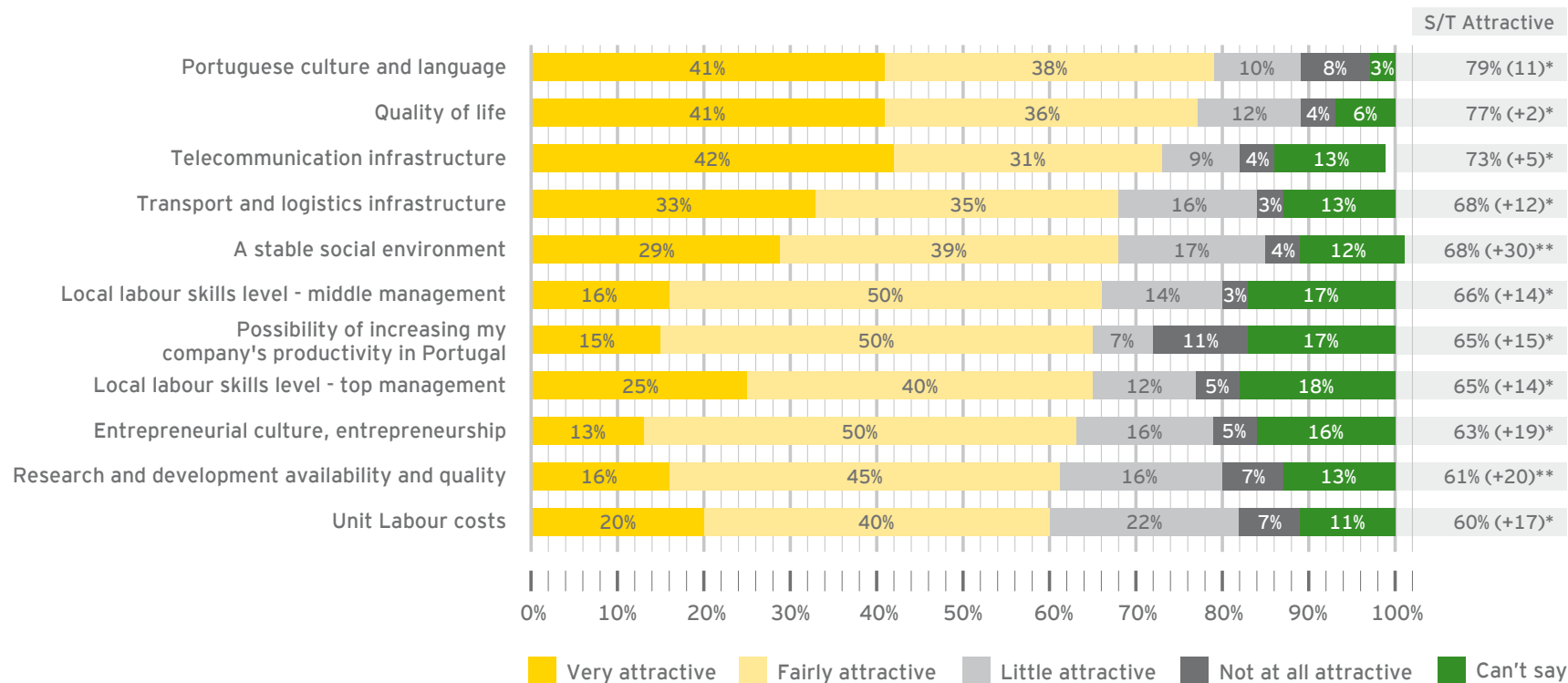
Over the past year has your perception of Portugal as a location where your company might establish or develop activities...?

	Total	Interviewed in / out		Size of the company-sales turnover			Sector of activity of the company		
		Inter in Portugal	Inter out Portugal	<150 Million euros	From 150 Million euros to 1,5 Billion euros	>1,5 Billion euros	S/T Private & Business services	S/T Industry Automotive Energy	S/T Consumer
Base	204	102	102	67	67	69	42	82	55
S/T Improved	42%	59%	25%	41%	37%	48%	24%	45%	43%
Significantly improved	23%	38%	8%	19%	18%	31%	14%	28%	18%
Slightly improved	19%	21%	18%	22%	20%	16%	10%	17%	24%
S/T Deteriorated	16%	14%	19%	9%	23%	17%	21%	13%	17%
Slightly deteriorated	13%	13%	14%	8%	16%	16%	17%	11%	13%
Significantly deteriorated	3%	1%	5%	1%	7%	1%	4%	2%	4%
Neither improved, nor deteriorated	39%	27%	51%	50%	37%	31%	55%	38%	38%
Can't say	2%	-	5%	-	3%	4%	-	4%	3%

Rebound of most of criteria in 2010. Strengthening of social and cultural criteria...

I'm going to mention a number of criteria according to which a company can evaluate how attractive Portugal is as a location for establishing new activities. For each criterion, I'd like you to tell me if, from the point of view of your company, Portugal is very, fairly, little or not at all attractive.

3 possible responses, results >100%

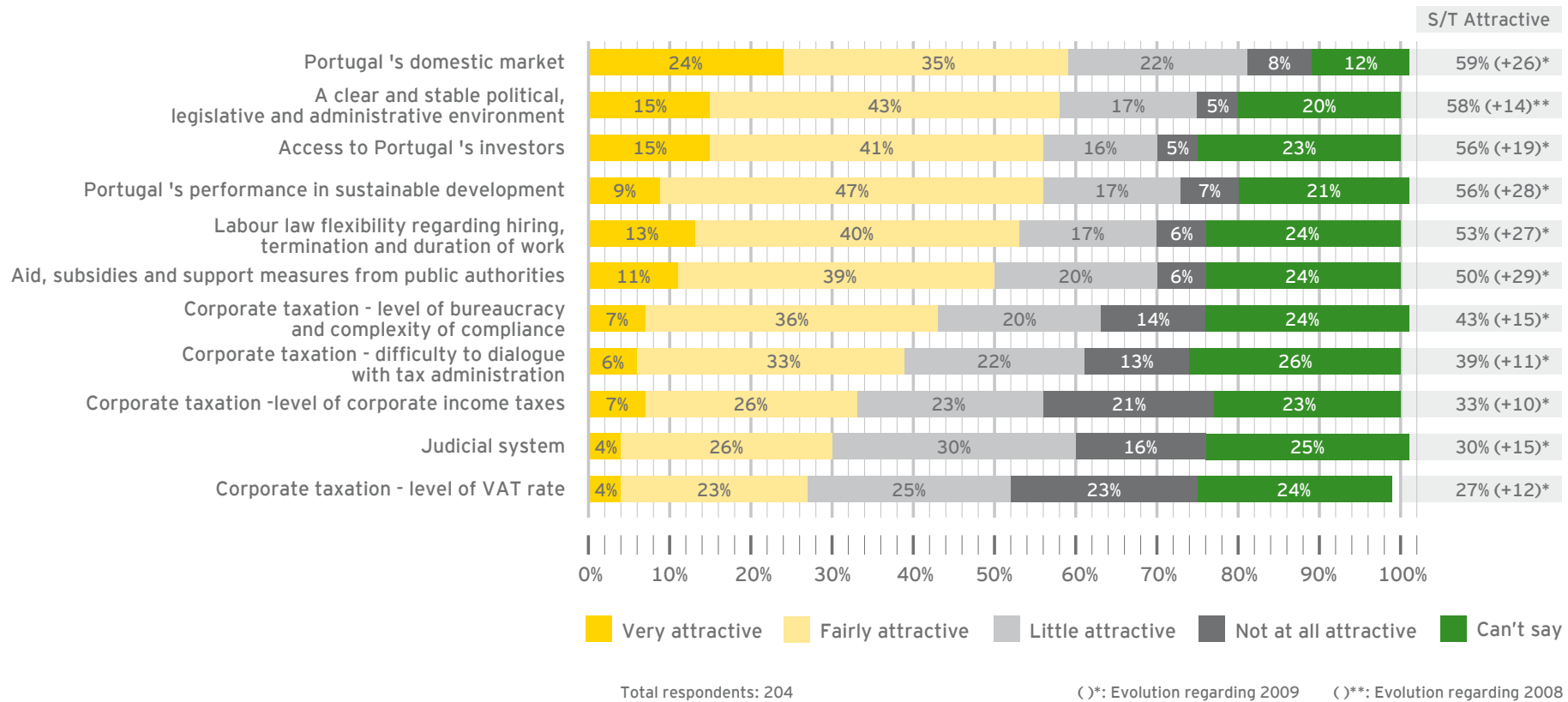


Total respondents: 204

()*: Evolution regarding 2009

()**: Evolution regarding 2008

...but also of Corporate taxation judged too heavy



Investors already established are Portugal's best ambassadors (part1)

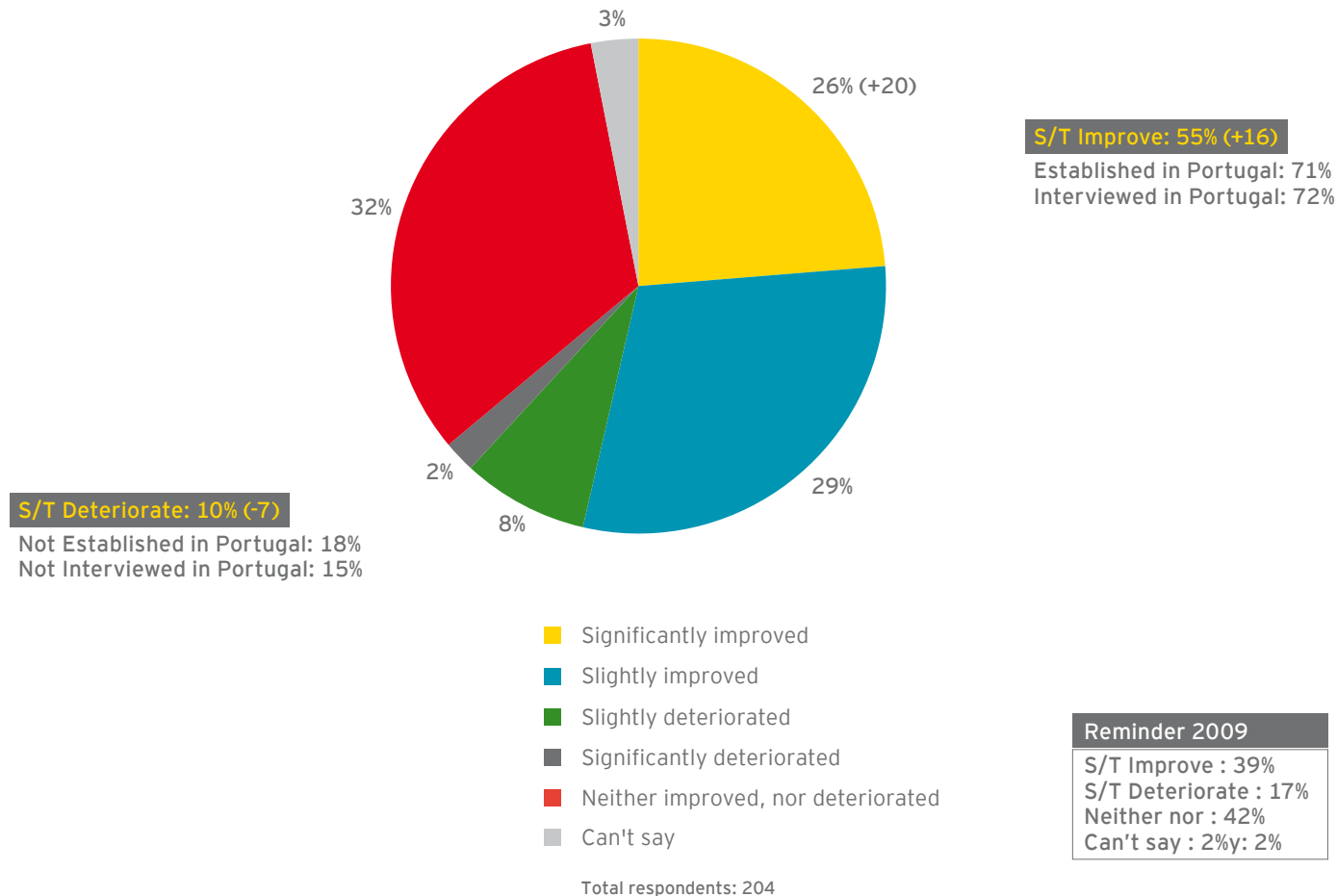
	Total	Interviewed in / out		Size of the company-sales turnover			Sector of activity of the company		
		Inter in Portugal	Inter out Portugal	<150 Million euros	From 150 Million euros to 1,5 Billion euros	>1,5 Billion euros	S/T Private & Business services	S/T Industry Automotive Energy	S/T Consumer
Base	204	102	102	67	67	69	42	82	55
Portuguese culture and language									
S/T Attractive	79%	95%	63%	78%	74%	85%	80%	79%	76%
Very attractive	41%	62%	20%	25%	43%	54%	38%	50%	34%
Quality of life									
S/T Attractive	78%	89%	67%	71%	79%	84%	87%	72%	79%
Very attractive	41%	61%	22%	25%	48%	51%	44%	42%	41%
Telecommunication infrastructure									
S/T Attractive	74%	96%	52%	72%	69%	81%	75%	70%	80%
Very attractive	42%	60%	25%	33%	41%	53%	44%	43%	39%
Transport and logistics infrastructure									
S/T Attractive	68%	90%	46%	60%	66%	78%	76%	66%	70%
Very attractive	33%	48%	19%	23%	31%	45%	45%	28%	31%
A stable social environment									
S/T Attractive	67%	82%	53%	65%	64%	73%	81%	63%	67%
Very attractive	29%	41%	17%	33%	23%	30%	31%	32%	27%
Local labour skills level - middle mangement									
S/T Attractive	66%	87%	45%	63%	66%	69%	58%	66%	67%
Very attractive	16%	28%	4%	11%	16%	20%	12%	23%	10%
Possibility of increasing my company's productivity in Portugal									
S/T Attractive	65%	91%	39%	66%	58%	71%	71%	53%	69%
Very attractive	15%	18%	13%	18%	14%	14%	15%	9%	22%
Local labour skills level - top management									
S/T Attractive	64%	92%	36%	60%	62%	71%	60%	66%	60%
Very attractive	25%	35%	14%	25%	21%	28%	27%	27%	14%
Entrepreneurial culture, entrepreneurship									
S/T Attractive	63%	78%	47%	72%	54%	63%	59%	63%	56%
Very attractive	13%	14%	12%	15%	14%	11%	8%	14%	12%
Research and development availability and quality									
S/T Attractive	61%	81%	41%	58%	58%	67%	58%	62%	60%
Very attractive	16%	20%	11%	12%	17%	18%	18%	14%	17%
Unit Labour costs									
S/T Attractive	60%	73%	47%	67%	49%	65%	68%	57%	53%
Very attractive	20%	30%	10%	21%	21%	18%	15%	25%	20%

Investors already established are Portugal's best ambassadors (part2)

	Total	Interviewed in / out		Size of the company-sales turnover			Sector of activity of the company		
		Inter in Portugal	Inter out Portugal	<150 Million euros	From 150 Million euros to 1,5 Billion euros	>1,5 Billion euros	S/T Private & Business services	S/T Industry Automotive Energy	S/T Consumer
Base	204	102	102	67	67	69	42	82	55
Portugal 's domestic market									
S/T Attractive	59%	76%	41%	47%	62%	68%	60%	48%	63%
Very attractive	24%	33%	15%	17%	24%	31%	21%	23%	20%
A clear and stable political, legislative and administrative environment									
S/T Attractive	58%	76%	40%	60%	43%	71%	52%	52%	63%
Very attractive	61%	21%	9%	14%	12%	20%	14%	21%	8%
Access to Portugal 's investors									
S/T Attractive	56%	74%	37%	52%	53%	63%	58%	59%	50%
Very attractive	15%	20%	10%	18%	15%	12%	13%	18%	14%
Portugal 's performance in sustainable development									
S/T Attractive	55%	79%	32%	58%	45%	63%	52%	53%	50%
Very attractive	9%	15%	2%	7%	9%	10%	4%	8%	16%
Labour law flexibility regarding hiring, termination and duration of work									
S/T Attractive	53%	73%	33%	49%	53%	58%	44%	53%	53%
Very attractive	13%	20%	7%	15%	11%	15%	8%	16%	12%
Aid, subsidies and support measures from public authorities									
S/T Attractive	50%	68%	32%	54%	41%	55%	51%	42%	50%
Very attractive	11%	12%	10%	14%	7%	11%	8%	13%	10%
Corporate taxation - level of bureaucracy and complexity of compliance									
S/T Attractive	43%	49%	36%	41%	38%	48%	46%	36%	41%
Very attractive	7%	8%	6%	5%	2%	12%	9%	6%	3%
Corporate taxation - difficulty to dialogue with tax administration									
S/T Attractive	39%	51%	27%	40%	36%	39%	33%	38%	34%
Very attractive	6%	9%	3%	3%	4%	11%	1%	6%	9%
Corporate taxation -level of corporate income taxes									
S/T Attractive	33%	40%	27%	29%	33%	38%	32%	31%	42%
Very attractive	7%	8%	7%	-	10%	11%	8%	10%	5%
Judicial system									
S/T Attractive	30%	26%	34%	25%	28%	36%	41%	27%	23%
Very attractive	4%	5%	3%	-	4%	8%	5%	6%	1%
Corporate taxation - level of VAT rate									
S/T Attractive	27%	29%	25%	28%	34%	20%	22%	27%	30%
Very attractive	4%	6%	3%	1%	7%	4%	4%	6%	4%

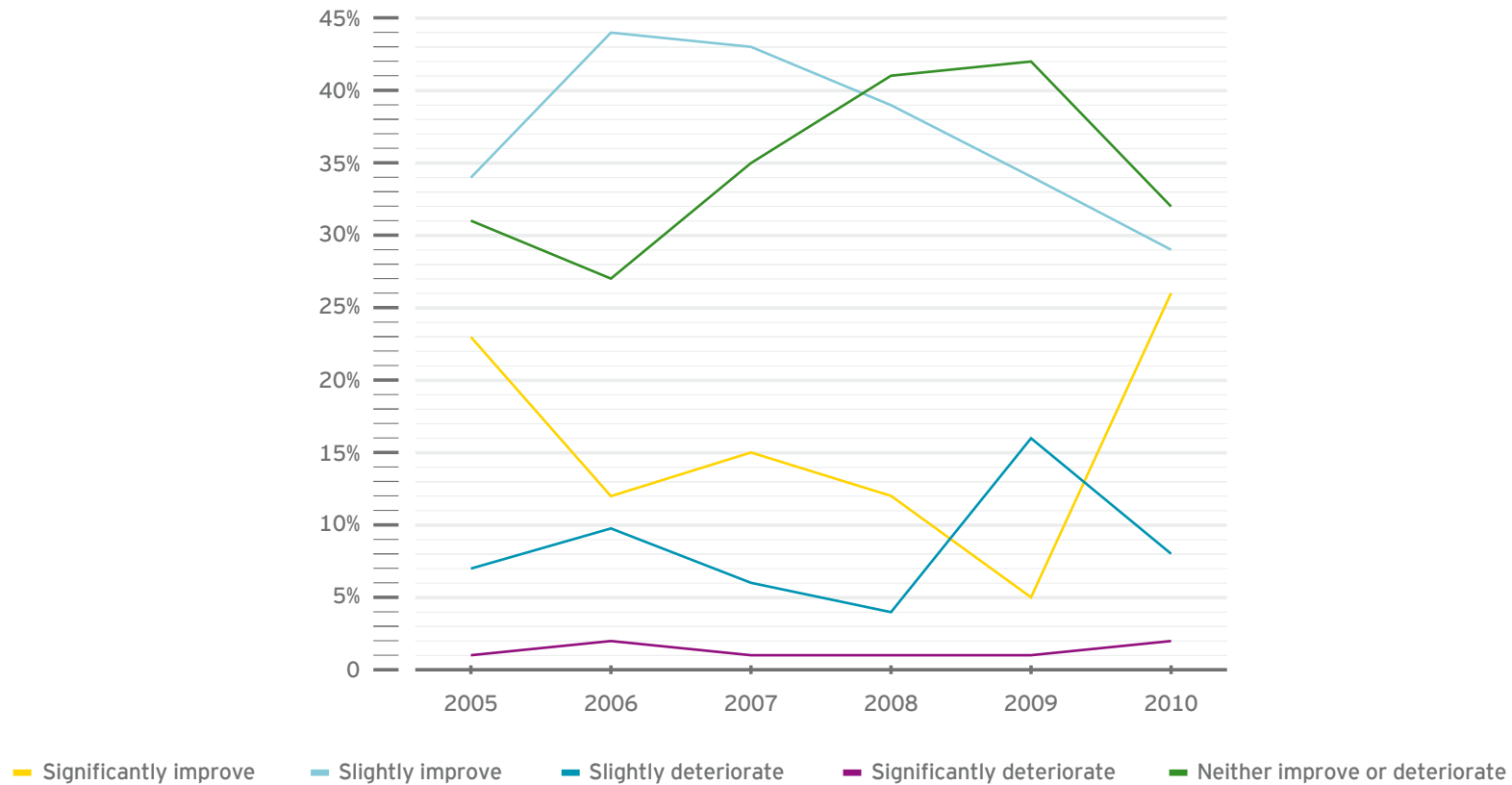
The perception of Portugal's prospects is back to 2008, a temptation to forget the crisis

Over the next three years, do you think the attractiveness of Portugal as a place for your company to establish or develop activities will...?



Portugal's best score on "significantly improve" since 2005

S/T Improve	57%	56%	58%	51%	39%	55%
S/T Deteriorate	8%	12%	7%	5%	17%	10%



Investors already established in Portugal and big companies are particularly optimistic on Portugal's attractiveness

Over the next three years, do you think the attractiveness of Portugal as a place for your company to establish or develop activities will...?

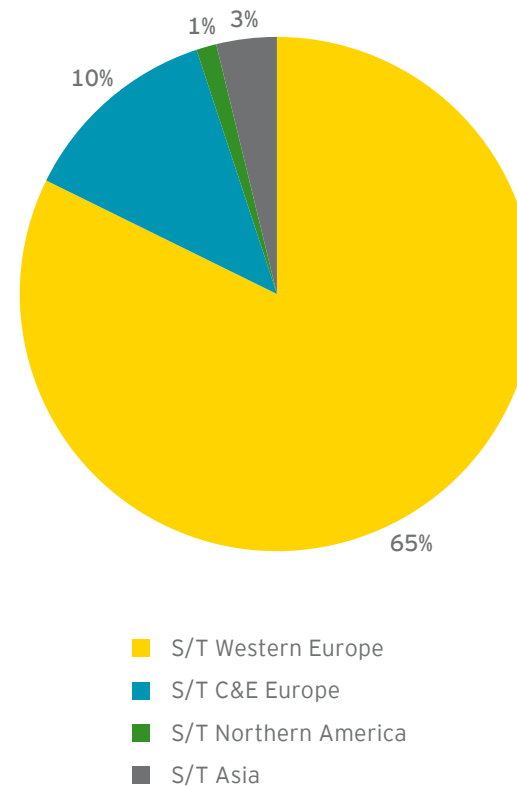
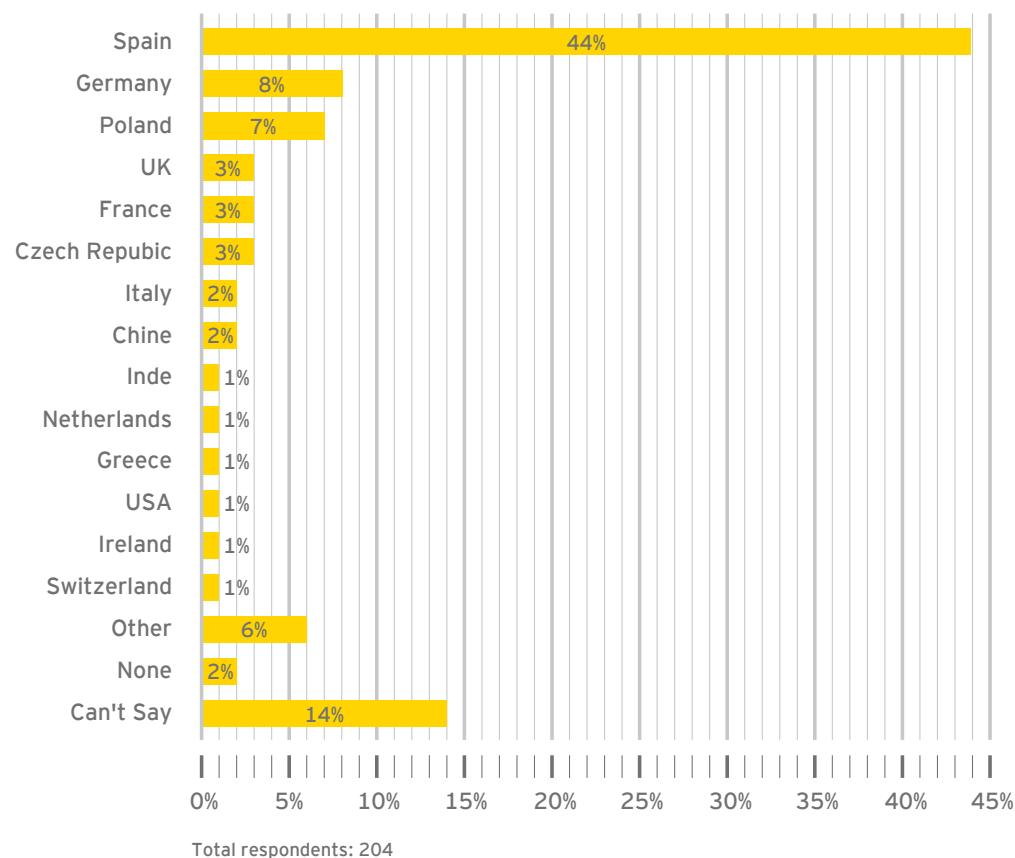
	Total	Interviewed in / out		Size of the company-sales turnover			Sector of activity of the company		
		Inter in Portugal	Inter out Portugal	<150 Million euros	From 150 Million euros to 1,5 Billion euros	>1,5 Billion euros	S/T Private & Business services	S/T Industry Automotive Energy	S/T Consumer
Base	204	102	102	67	67	69	42	82	55
S/T Improve	55%	72%	38%	43%	59%	63%	36%	56%	59%
Significantly improve	26%	36%	16%	18%	24%	37%	22%	27%	17%
Slightly improve	29%	35%	22%	25%	35%	26%	14%	29%	42%
S/T Deteriorate	9%	4%	15%	9%	11%	9%	13%	11%	2%
Slightly deteriorate	8%	3%	13%	9%	7%	6%	8%	10%	2%
Significantly deteriorate	2%	1%	3%	-	3%	2%	5%	1%	1%
Neither improve nor deteriorate	32%	24%	40%	43%	26%	27%	51%	31%	30%
Can't say	3%	-	7%	5%	5%	1%	-	2%	9%



III. Portugal's main competing countries

Spain is still the main competitor of Portugal, Germany moved up to second place, at the expense of Eastern countries

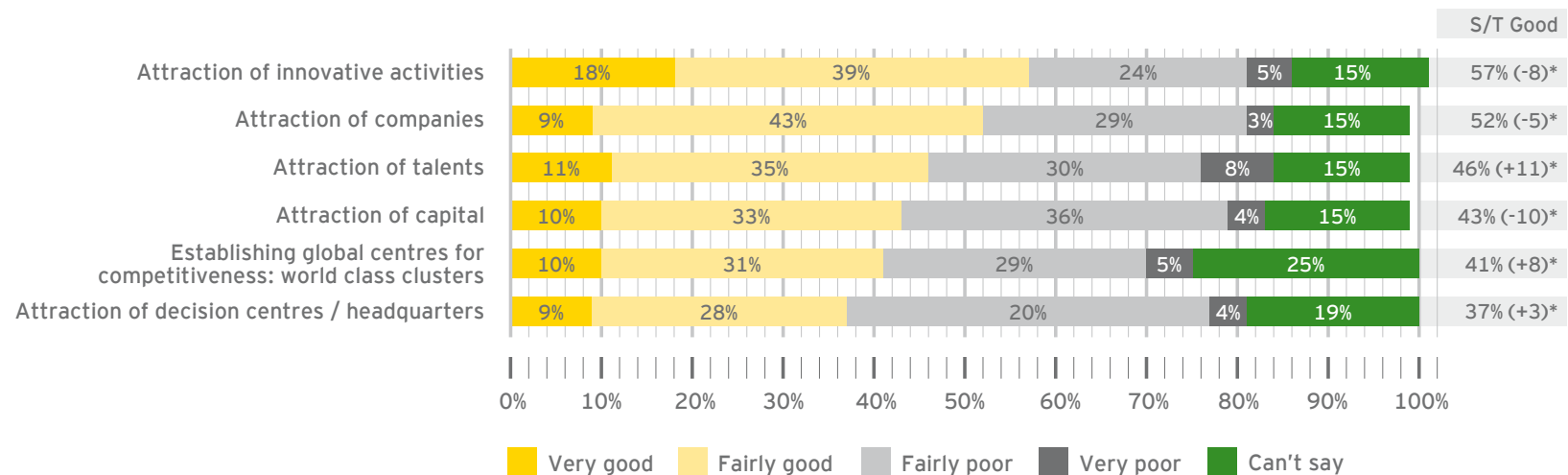
And from a general point of view, in your opinion, which is Portugal's main competing country in terms of attractiveness? *Open-ended question*



Reminder 2009	
Spain	55%
Poland	7%
Czech Republic	6%
France	4%

Uneven perceptions: Portugal progresses in attraction of talents and for establishing world class clusters, but loses ground for attraction of capital and innovative activities

We are now going to speak about different aspects of Portugal's performance. In your opinion, is Portugal's level of performance very good, fairly good, fairly poor or very poor for each of the following aspects?



Total respondents: 204

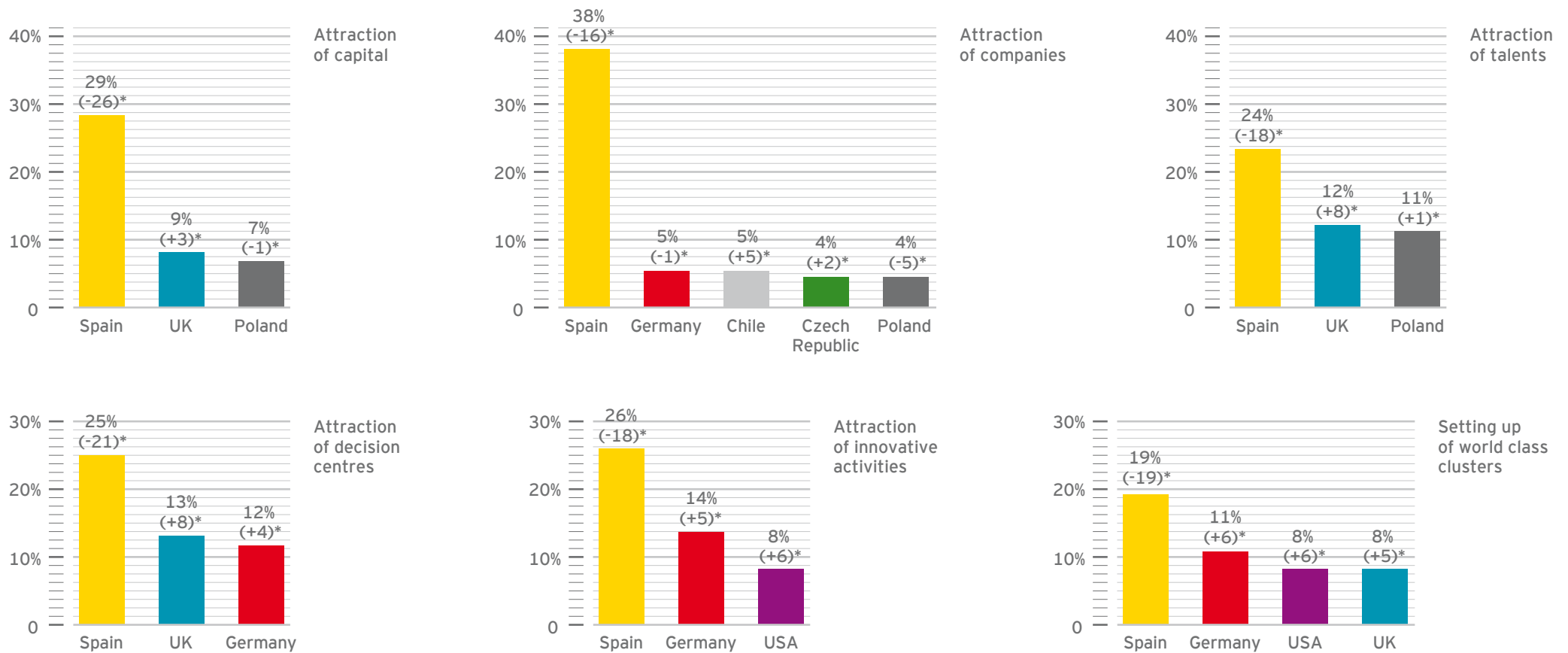
(*)*: Evolution regarding 2008

Portugal should convince outside its frontiers

	Ensemble	Interviewed in / out		Size of the company-sales turnover			Sector of activity of the company		
		Inter in Portugal	Inter out Portugal	<150 Million euros	From 150 Million euros to 1,5 Billion euros	>1,5 Billion euros	S/T Private & Business services	S/T Industry Automotive Energy	S/T Consumer
Ensemble	204	102	102	67	67	69	42	82	55
Attraction of capital									
Very good	10%	18%	3%	3%	15%	13%	1%	15%	8%
S/T Good	44%	60%	27%	47%	39%	46%	39%	52%	27%
S/T Poor	40%	38%	42%	42%	41%	37%	48%	33%	50%
Attraction of companies									
Very Good	9%	14%	5%	2%	13%	12%	2%	13%	10%
S/T Good	52%	64%	41%	49%	55%	54%	58%	52%	43%
S/T Poor	32%	34%	31%	35%	30%	31%	33%	32%	32%
Attraction of talents									
Very Good	11%	18%	5%	3%	13%	17%	8%	14%	10%
S/T Good	46%	57%	35%	34%	48%	57%	48%	50%	40%
S/T Poor	39%	40%	37%	49%	35%	32%	40%	40%	38%
Attraction of decision centres/headquarters									
Very Good	9%	13%	5%	4%	12%	11%	4%	12%	10%
S/T Good	37%	51%	23%	34%	40%	36%	34%	36%	33%
S/T Poor	44%	44%	44%	54%	31%	48%	57%	47%	39%
Attraction of innovative activities									
Very Good	18%	29%	6%	11%	21%	20%	8%	20%	18%
S/T Good	56%	80%	32%	51%	55%	62%	63%	58%	48%
S/T Poor	29%	17%	40%	32%	31%	23%	31%	27%	31%
Establishing global centres for competitiveness: world class clusters									
Very Good	10%	18%	2%	3%	15%	13%	12%	10%	9%
S/T Good	41%	66%	17%	30%	43%	51%	40%	43%	36%
S/T Poor	34%	32%	36%	46%	30%	26%	42%	33%	32%

As in 2008, for the different aspects, Spain represent's Portugal's main competitor in terms of attractiveness but is less dominant than before

And for each of the following aspects, can you tell me which country, in your opinion, represents Portugal's main competitor? *Open-ended question*



Top countries for each aspect

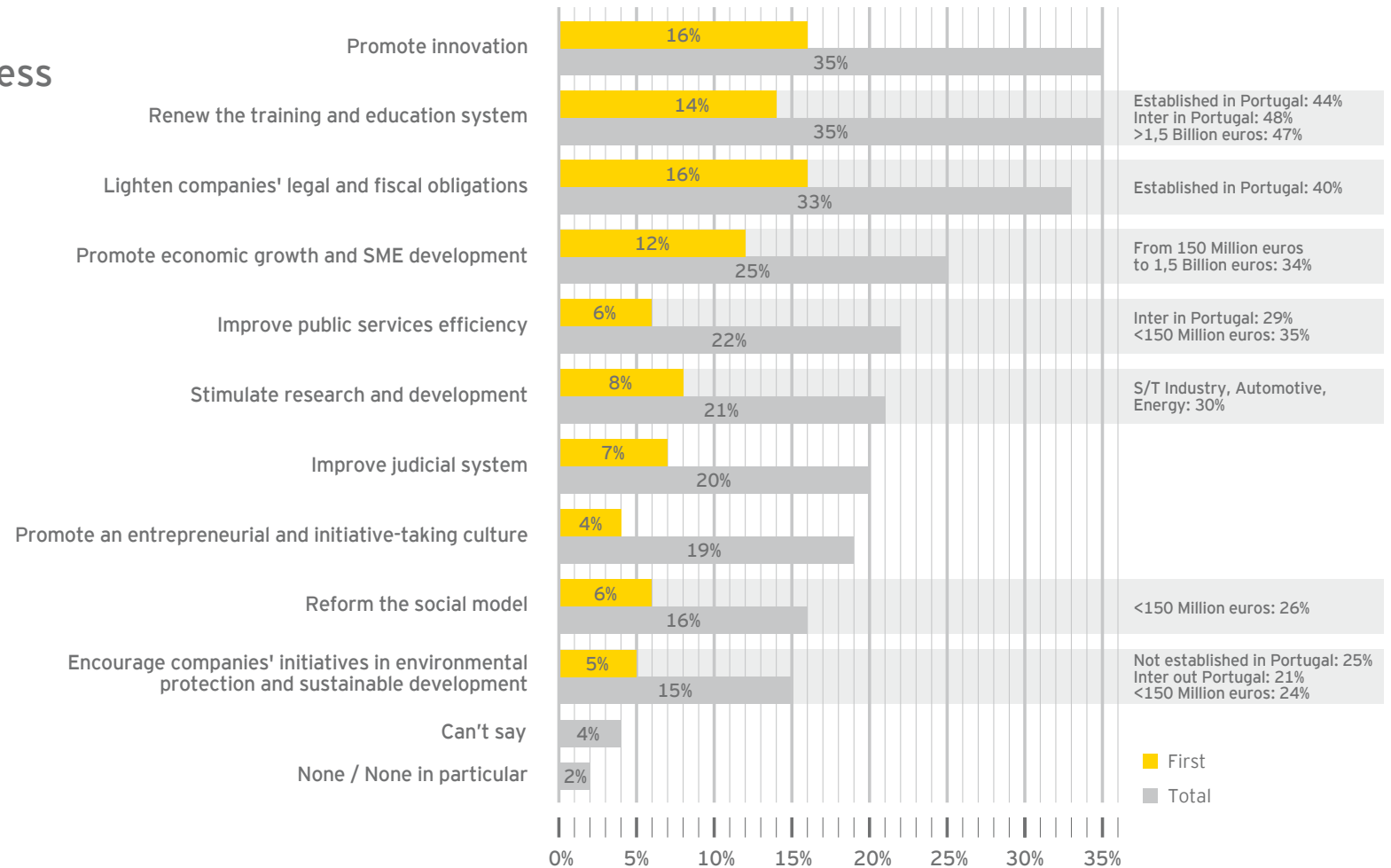
	Attraction of capital	Attraction of companies	Attraction of talents	Attraction of decision centres	Attraction of innovative activities	Setting up of world class clusters
Base	204	204	204	204	204	204
Spain	29%	38%	24%	25%	26%	19%
Germany	5%	5%	10%	12%	14%	11%
UK	9%	3%	11%	13%	7%	8%
USA	4%	2%	12%	2%	8%	8%
China	2%	5%	3%	2%	4%	4%
France	3%	3%	5%	2%	3%	2%
Poland	7%	4%	1%	1%	2%	2%
India	2%	3%	2%	2%	4%	2%
Czech Republic	2%	4%	1%	1%	1%	2%
Switzerland	4%	-	1%	3%	-	1%
Ireland	-	1%	-	1%	3%	2%
Italy	<1%	1%	1%	1%	2%	2%
Netherlands	1%	1%	1%	2%	-	1%
Belgium	<1%	1%	1%	3%	1%	-
Sweden	<1%	1%	<1%	-	2%	1%
Roumanie	2%	1%	2%	-	-	-
Japan	-	1%	1%	-	2%	-
Hong Kong	-	1%	1%	1%	-	1%
Hungary	1%	1%	<1%	<1%	-	<1%
Norway	-	-	-	-	-	1%
Luxemburg	1%	-	-	-	1%	-
Brazil	1%	-	-	-	-	-
Korea	-	-	-	-	1%	-
Finland	-	1%	-	-	-	<1%
Russia	-	1%	-	-	-	-
Canada	-	-	-	-	1%	-
Australia	-	<1%	<1%	<1%	<1%	<1%
Denmark	-	-	-	<1%	-	<1%



IV.
Portugal's attractiveness
in a changing world

In a competitive world, Portugal should continue to reinforce the business environment

In your opinion, which of the following measures should Portugal prioritize to reinforce its attractiveness to foreign investors?
3 possible responses, total >100%



Total respondents: 204

Reminder 2008

Lighten companies' legal and fiscal obligations: 43%
 Renew the training and education system: 40%
 Promote innovation: 23%

Priority measures are more numerous among investors established in Portugal

In your opinion, which of the following measures should Portugal prioritize to reinforce its attractiveness to foreign investors?

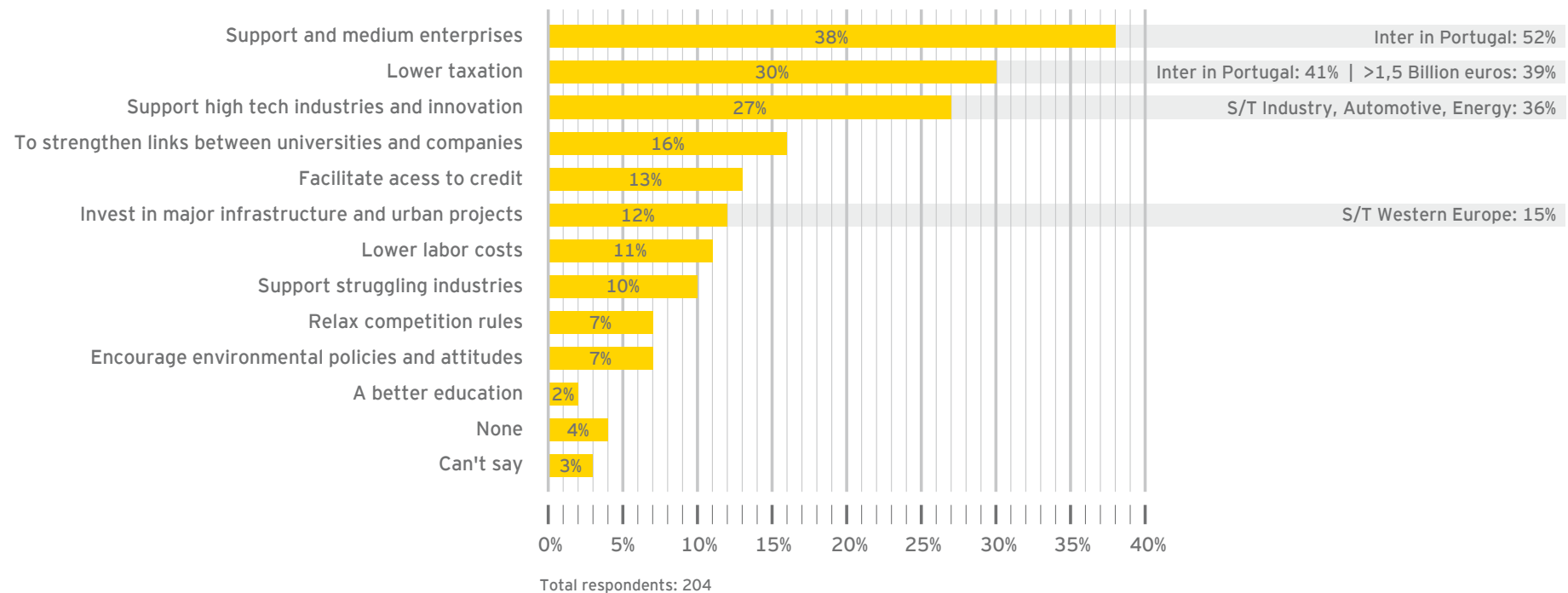
3 possible responses, total >100%

	Total	Interviewed in / out		Size of the company-sales turnover			Sector of activity of the company		
		Inter in Portugal	Inter out Portugal	<150 Million euros	From 150 Million euros to 1,5 Billion euros	>1,5 Billion euros	S/T Private & Business services	S/T Industry Automotive Energy	S/T Consumer
Base	204	102	102	67	67	69	42	82	55
Promote innovation	35%	43%	27%	33%	36%	37%	36%	28%	36%
Renew the training and education system	35%	48%	22%	24%	32%	47%	34%	38%	29%
Lighten companies' legal and fiscal obligations	33%	39%	26%	38%	31%	29%	42%	22%	39%
Promote economic growth and SME development	25%	19%	30%	28%	34%	13%	31%	26%	23%
Improve public services efficiency	22%	29%	15%	35%	15%	16%	31%	22%	12%
Stimulate research and development	21%	21%	20%	26%	14%	22%	7%	30%	20%
Improve judicial system	20%	34%	6%	14%	18%	27%	19%	21%	24%
Promote an entrepreneurial and initiative-taking culture	19%	17%	21%	17%	21%	19%	21%	17%	21%
Reform the social model	16%	19%	14%	11%	12%	26%	18%	19%	9%
Encourage companies' initiatives in environmental protection and sustainable development	15%	9%	21%	24%	14%	8%	24%	12%	13%
Can't say	4%	-	9%	7%	2%	3%	-	3%	8%
None / None in particular	2%	-	4%	-	4%	2%	-	4%	2%

The most urgent measures: support entrepreneurship and innovation, decrease taxes

What measures should Portugal take to stimulate growth in the next 2 years?

2 possible responses, total >100%



The importance of corporate taxation weight is higher among investors established in Portugal and big companies

What measures should Portugal take to stimulate growth in the next 2 years?

2 possible responses, total >100%

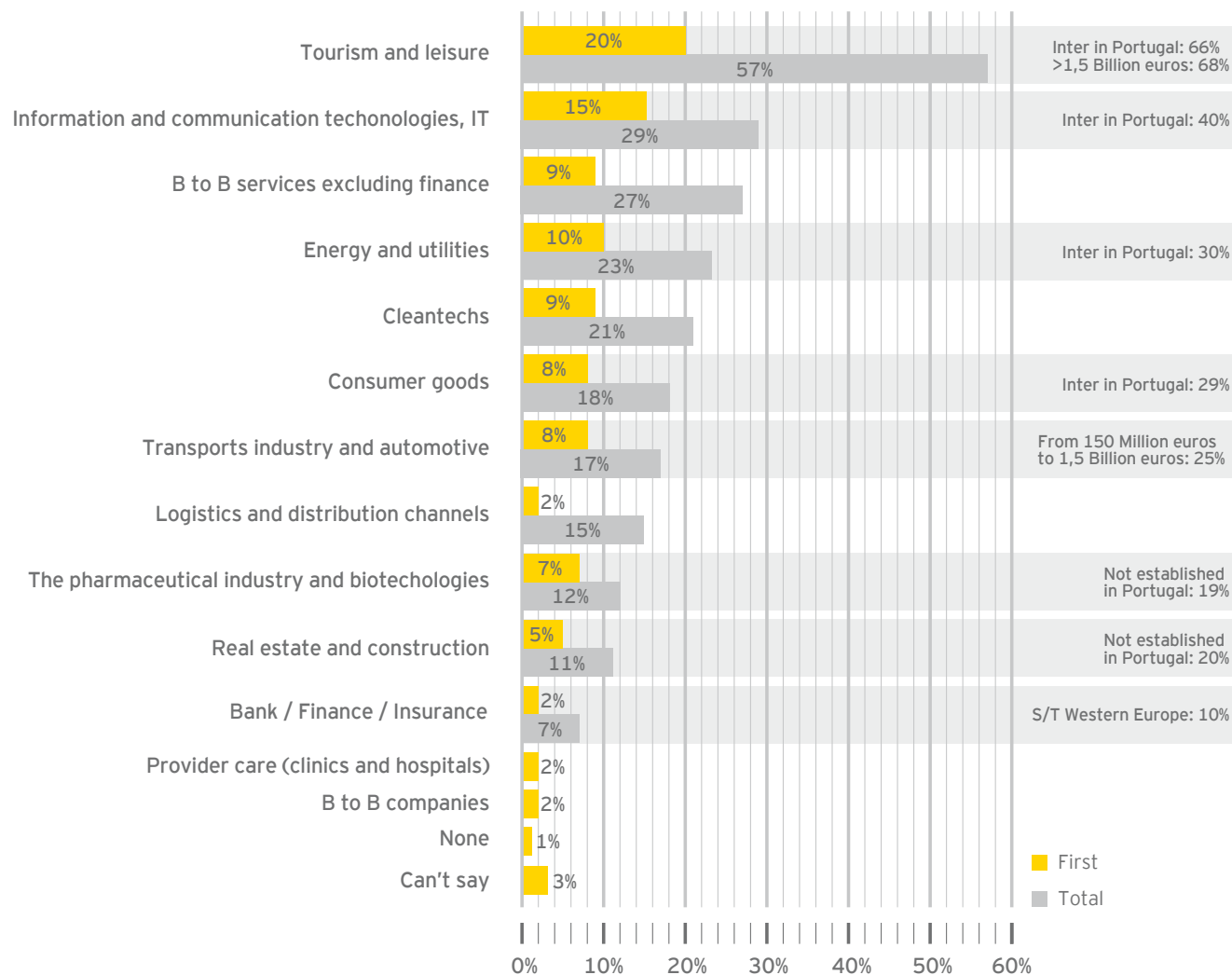
	Total	Interviewed in / out		Size of the company-sales turnover			Sector of activity of the company		
		Inter in Portugal	Inter out Portugal	<150 Million euros	From 150 Million euros to 1,5 Billion euros	>1,5 Billion euros	S/T Private & Business services	S/T Industry Automotive Energy	S/T Consumer
Base	204	102	102	67	67	69	42	82	55
Support small and medium enterprises	38%	52%	24%	39%	47%	28%	40%	31%	45%
Lower taxation	30%	41%	19%	17%	32%	39%	36%	28%	29%
Support high tech industries and innovation	27%	28%	25%	30%	27%	23%	17%	36%	30%
To strengthen links between universities and companies	16%	17%	15%	24%	12%	12%	10%	19%	9%
Facilitate access to credit	13%	11%	15%	15%	10%	14%	14%	15%	12%
Invest in major infrastructure and urban projects	12%	9%	15%	13%	10%	12%	17%	9%	10%
Lower labor costs	11%	10%	12%	4%	16%	13%	17%	10%	4%
Support struggling industries	10%	10%	11%	13%	8%	10%	5%	7%	15%
Relax competition rules	7%	11%	4%	5%	7%	9%	10%	2%	12%
Encourage environmental policies and attitudes	7%	4%	10%	7%	6%	8%	12%	9%	3%
A better education	2%	-	4%	-	4%	2%	-	2%	5%
None	4%	-	8%	5%	5%	2%	-	7%	4%
Can't say	3%	1%	5%	4%	2%	4%	-	4%	3%

Tourism and leisure is the main sector driving Portugal's growth in the next 2 years

Which three of the following business sectors do you perceive as driving Portugal's growth in the next 2 years?
3 possible responses, total >100%

Total respondents: 204

And also (≤1%)	Total
Health	1%
Education	1%
BtoB companies	1%
High quality production	<1%



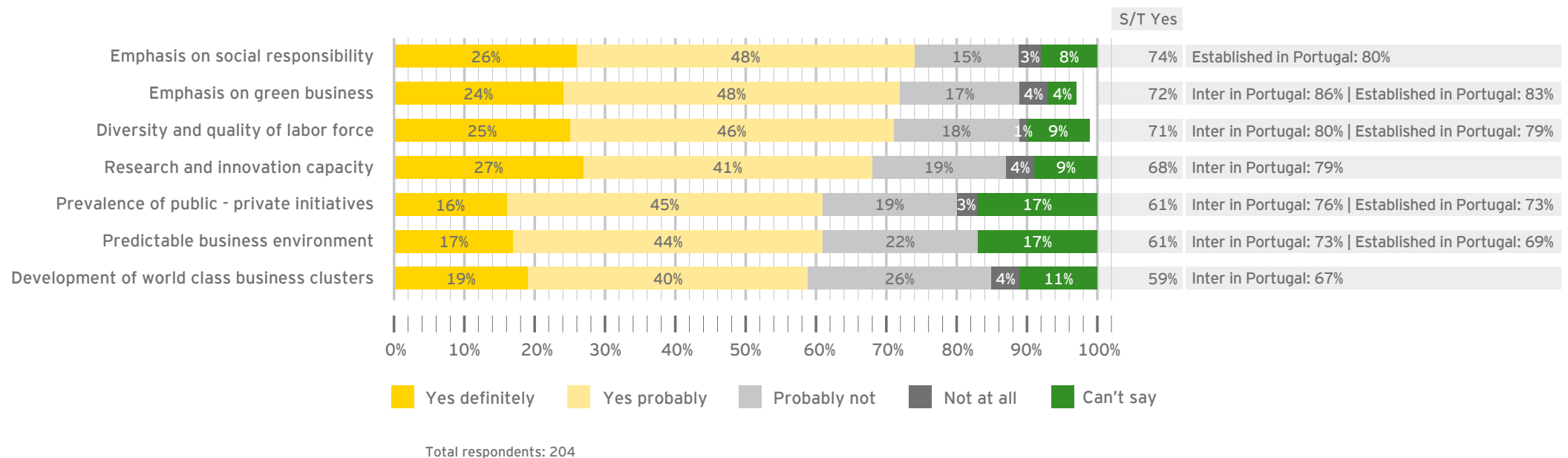
Tourism and leisure is the main sector driving Portugal's growth in the next 2 years

Which three of the following business sectors do you perceive as driving Portugal's growth in the next 2 years? *3 possible responses, total >100%*

	Total	Interviewed in / out		Size of the company-sales turnover			Sector of activity of the company		
		Inter in Portugal	Inter out Portugal	<150 Million euros	From 150 Million euros to 1,5 Billion euros	>1,5 Billion euros	S/T Private & Business services	S/T Industry Automotive Energy	S/T Consumer
Base	204	102	102	67	67	69	42	82	55
Tourism and leisure	57%	66%	48%	47%	55%	68%	54%	61%	55%
Information and communication technologies, IT	29%	40%	18%	35%	24%	28%	35%	23%	31%
BtoB services excluding finance	27%	30%	23%	35%	31%	15%	34%	24%	19%
Energy and utilities	23%	30%	16%	20%	23%	27%	33%	25%	17%
Cleantechs	21%	27%	15%	20%	18%	23%	17%	17%	24%
Consumer goods	18%	7%	29%	26%	20%	8%	17%	15%	24%
Transports industry and automotive	17%	16%	18%	3%	25%	23%	6%	20%	18%
Logistics and distribution channels	15%	16%	14%	12%	15%	19%	14%	19%	10%
The pharmaceutical industry and biotechnologies	12%	9%	15%	12%	9%	15%	17%	9%	13%
Real estate and construction	11%	5%	18%	13%	14%	7%	12%	12%	12%
Bank / Finance / Insurance	7%	5%	9%	7%	8%	7%	11%	7%	7%
Can't say	3%	-	7%	4%	1%	5%	5%	4%	2%
Provider care (clinics and hospitals)	2%	2%	2%	3%	1%	2%	1%	3%	3%
B to B companies	2%	3%	<1%	-	2%	3%	3%	2%	2%
None	1%	1%	1%	-	2%	1%	2%	-	3%

Portugal's best world class features: Emphasis on social responsibility, green business and the diversity and quality of labor force. Wishful thinking?

In the post recession economy, what do you see as Portugal's world class features?



Established or not: a significant criterion

In the post recession economy, what do you see as Portugal's world class features?

	Total	Interviewed in / out		Size of the company-sales turnover			Sector of activity of the company		
		Inter in Portugal	Inter out Portugal	<150 Million euros	From 150 Million euros to 1,5 Billion euros	>1,5 Billion euros	S/T Private & Business services	S/T Industry Automotive Energy	S/T Consumer
Base	204	102	102	67	67	69	42	82	55
Emphasis on social responsibility									
S/T Yes	74%	80%	67%	80%	71%	70%	77%	78%	65%
Yes definitely	26%	30%	21%	21%	26%	31%	26%	30%	26%
S/T No	18%	17%	19%	15%	20%	20%	14%	15%	23%
Emphasis on green business									
S/T Yes	73%	86%	60%	72%	68%	78%	71%	69%	75%
Yes definitely	24%	23%	26%	17%	26%	30%	25%	27%	25%
S/T No	20%	11%	30%	23%	23%	15%	20%	25%	16%
Diversity and quality of labor force									
S/T Yes	71%	80%	63%	73%	67%	73%	65%	69%	74%
Yes definitely	25%	32%	18%	17%	26%	31%	20%	26%	30%
S/T No	20%	15%	24%	19%	24%	16%	23%	21%	17%
Research and innovation capacity									
S/T Yes	68%	79%	58%	71%	62%	72%	61%	66%	70%
Yes definitely	27%	31%	22%	29%	19%	32%	18%	28%	33%
S/T No	23%	18%	27%	22%	29%	18%	24%	27%	21%
Prevalence of public - private initiatives									
S/T Yes	61%	76%	47%	60%	59%	64%	59%	58%	66%
Yes definitely	16%	15%	16%	17%	10%	21%	18%	15%	13%
S/T No	22%	14%	30%	25%	25%	16%	23%	22%	21%
Predictable business environment									
S/T Yes	61%	73%	48%	45%	67%	70%	52%	56%	67%
Yes definitely	17%	19%	15%	13%	15%	23%	8%	22%	16%
S/T No	22%	16%	29%	38%	16%	14%	28%	26%	15%
Development of world class business clusters									
S/T Yes	59%	67%	50%	58%	60%	58%	47%	60%	60%
Yes definitely	19%	20%	18%	17%	19%	20%	16%	20%	19%
S/T No	30%	29%	31%	31%	29%	29%	39%	27%	30%

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