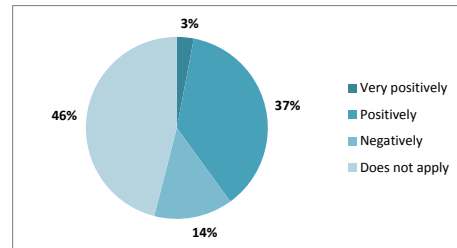


EuroCham Business Climate Index Quarter 2/2014

Hot questions of the quarter

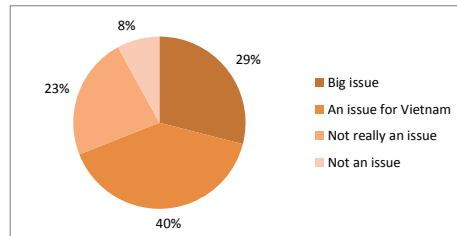
1. The new online Vietnam Customs Information System will soon be a reality – how will it impact your business?

Very positively	a lot simpler to fill out and will help save time	3%
Positively	will facilitate running my business, but issues will still remain	37%
Negatively	this will not resolve anything, but only bring new issues	14%
Does not apply	not enough information / not relevant to my business	46%



2. The new Decree 102 and Circular 3, hiring of foreign staff and experts – how does this impact your company?

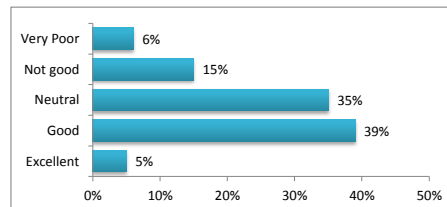
Big issue	it limits my operations in areas where there is a shortage of local talents and I may therefore have to outsource some tasks outside of Vietnam	29%
An issue for Vietnam	in particular as it impacts the process to develop local talents	40%
Not really an issue	I mainly use local staff	23%
Not an issue	Not an issue for my business	8%



General question

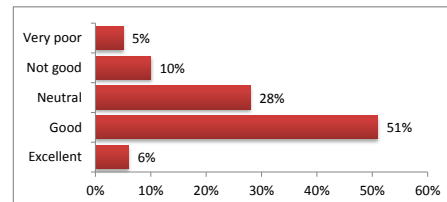
1. Current business situation of your enterprise

Excellent	5%
Good	39%
Neutral	35%
Not good	15%
Very Poor	6%



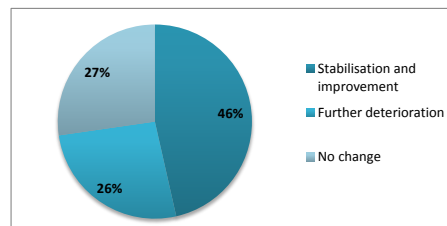
2. Business Outlook for your Enterprise

Excellent	6%
Good	51%
Neutral	28%
Not good	10%
Very poor	5%



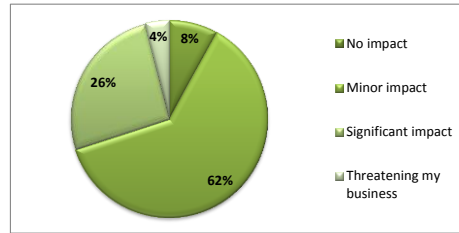
3. How do you assess the Macroeconomic outlook for Vietnam?

Stabilisation and improvement	46%
Further deterioration	26%
No change	27%



4. Will inflation have an impact on your business in Vietnam in the medium-term?

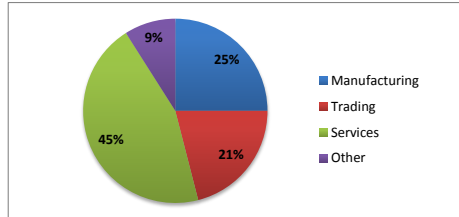
No impact	8%
Minor impact	62%
Significant impact	26%
Threatening my business	4%



5. Expected % of VND depreciation in next 6 months 4.26%

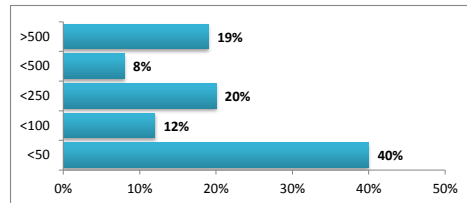
6. Member Sector

Manufacturing	25%
Trading	21%
Services	45%
Other	9%



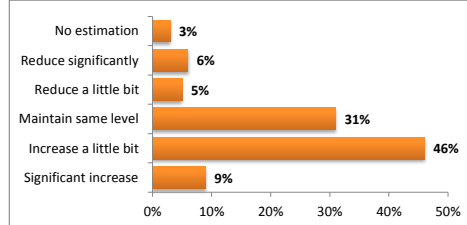
7. Number of Employees

<50	40%
<100	12%
<250	20%
<500	8%
>500	19%



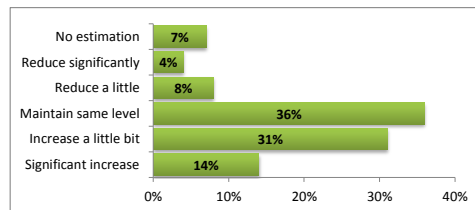
8. Expected headcount development in medium term?

Significant increase	9%
Increase a little bit	46%
Maintain same level	31%
Reduce a little bit	5%
Reduce significantly	6%
No estimation	3%



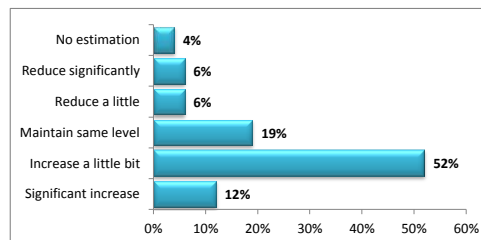
9. Expected investment plans in medium term?

Significant increase	14%
Increase a little bit	31%
Maintain same level	36%
Reduce a little	8%
Reduce significantly	4%
No estimation	7%



10. Expected number of orders/revenue in the medium-term

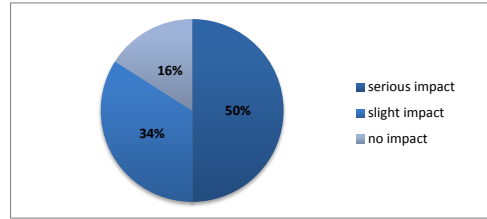
Significant increase	12%
Increase a little bit	52%
Maintain same level	19%
Reduce a little	6%
Reduce significantly	6%
No estimation	4%



Members' questions

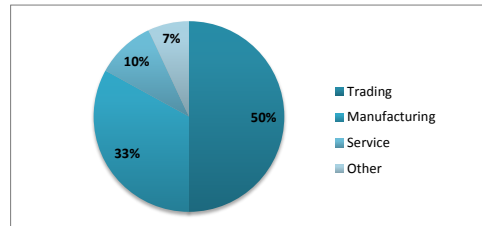
1. How does a shortage of skilled labor due to a lack of advanced vocational training impact your business?

serious impact	50%
slight impact	34%
no impact	16%



2. Which business sector would be most beneficial from the sign of EU-Vietnam FTA?

Trading	50%
Manufacturing	33%
Service	10%
Other	7%



3. How would you assess Vietnam's competitive advantages against other ASEAN countries in different criterias

	labour cost	infrastructure	legal and administrative system	availability of materials
very competitive	30%	1%	2%	4%
comparably competitive	59%	22%	16%	46%
less competitive	9%	75%	80%	45%

