wiiwExecutiveNetwork
COME FOR THE INSIGHTS, STAY FOR THE COMMUNITY

CEE 2027

BUDGETING FOR GROWTH AGAIN

Ambition is back, confidence is up,

and the region has one assumption to get right.

Final results from the Budgeting for 2027 in CEE benchmark · 25 CEE markets

wiiw Executive Network · Prague, 30 September 2026

Three questions every CEE budget has to answer this autumn

1

How will 2026 end, and why?

Budget achievement

2

What are you planning for 2027, and what are you counting on?

Targets, confidence, assumptions

3

Where is the investment going, and what will it take to deliver the 2027 plan?

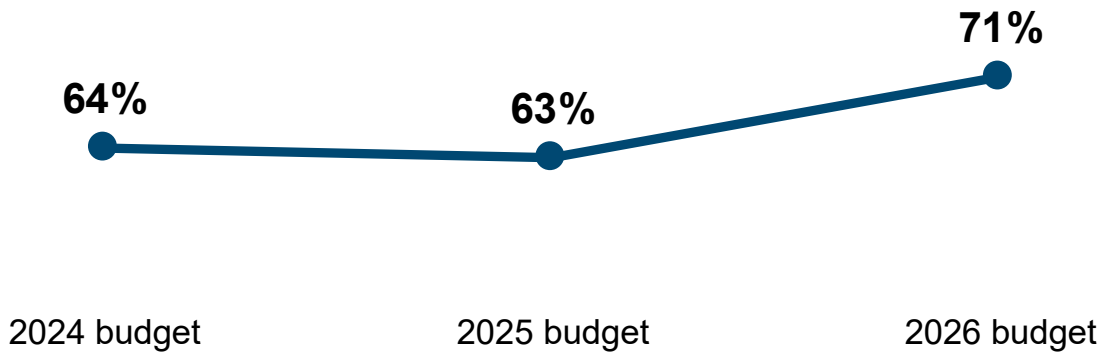
Wages, investment, priorities

Three years of data sets: 2025, 2026 and 2027 budgets · 25 CEE markets · final 2027 dataset

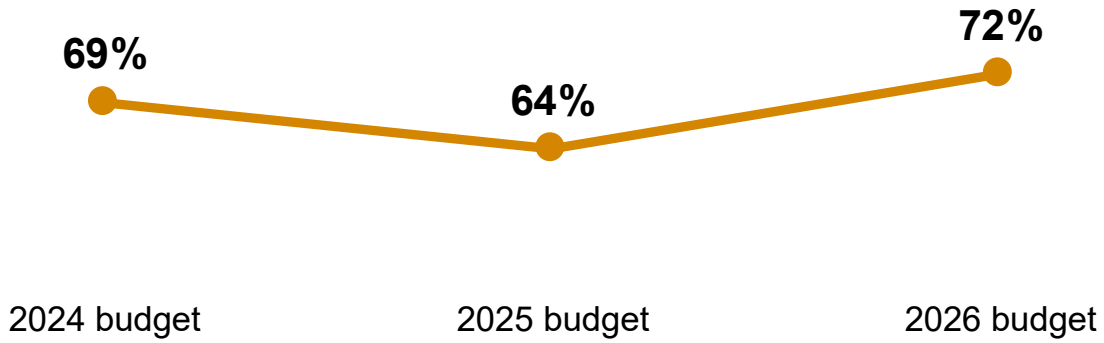
71% expect to meet or beat the 2026 revenue budget. The best reading in three years.

Do you expect to meet your original 2026 revenue and profit budget? (each respondent answers separately for every market they manage)

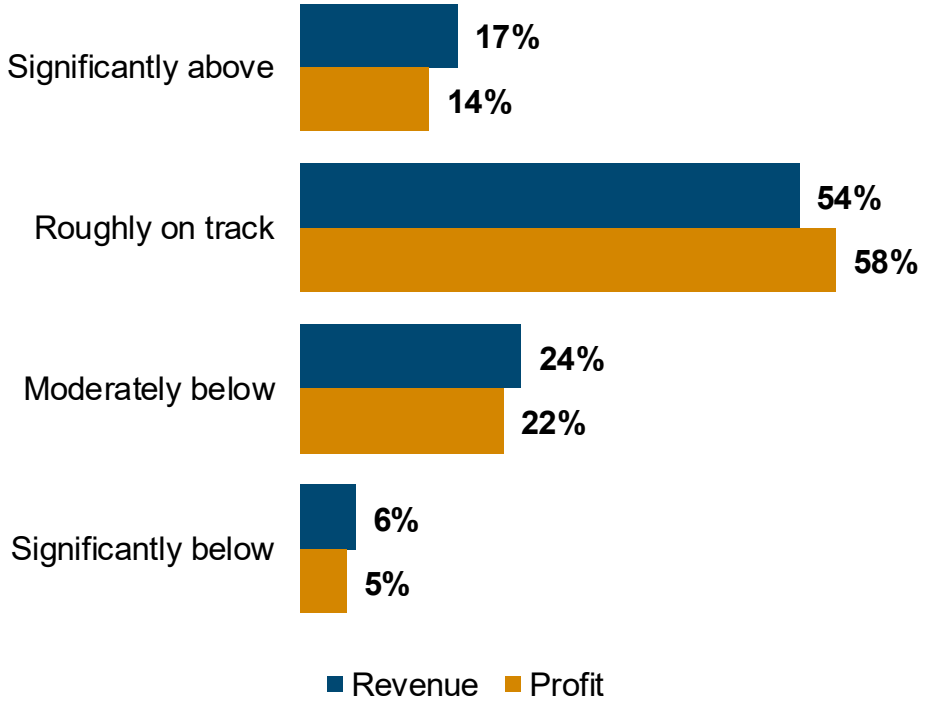
Revenue budget: share of market answers meeting or beating it



Profit budget: share of market answers meeting or beating it



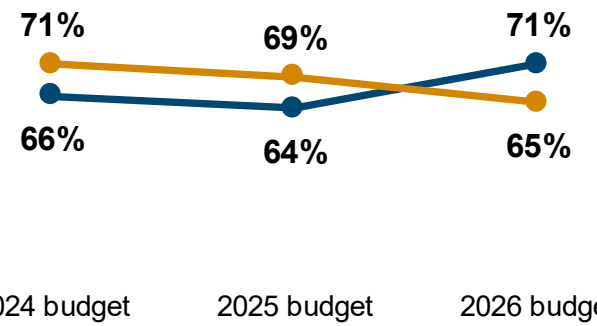
Where 2026 will land against budget



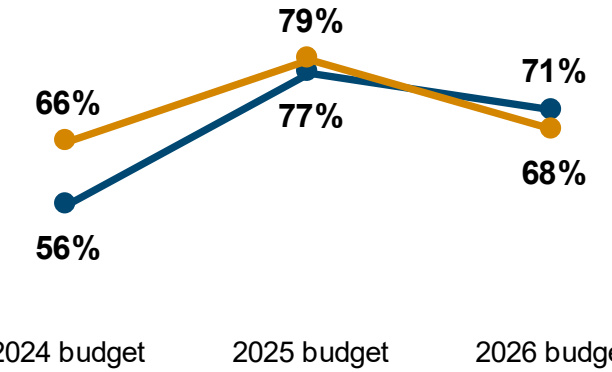
The key markets over three years: resilient delivery on the top and bottom lines.

Share of answers meeting or beating the revenue budget (blue) and profit budget (gold), market by market

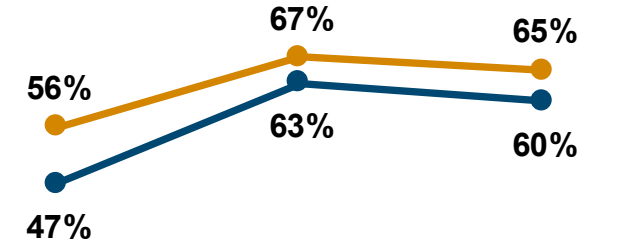
Poland



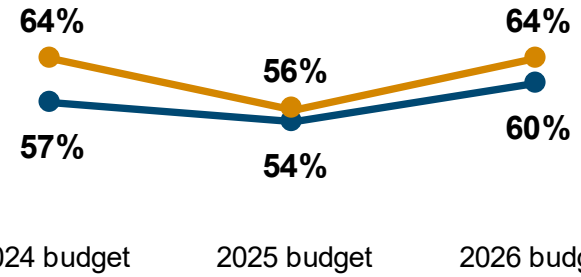
Czechia



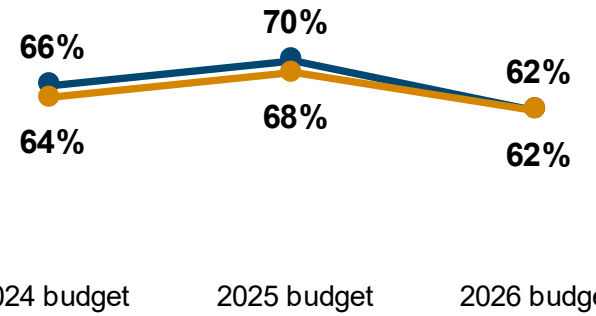
Slovakia



Hungary



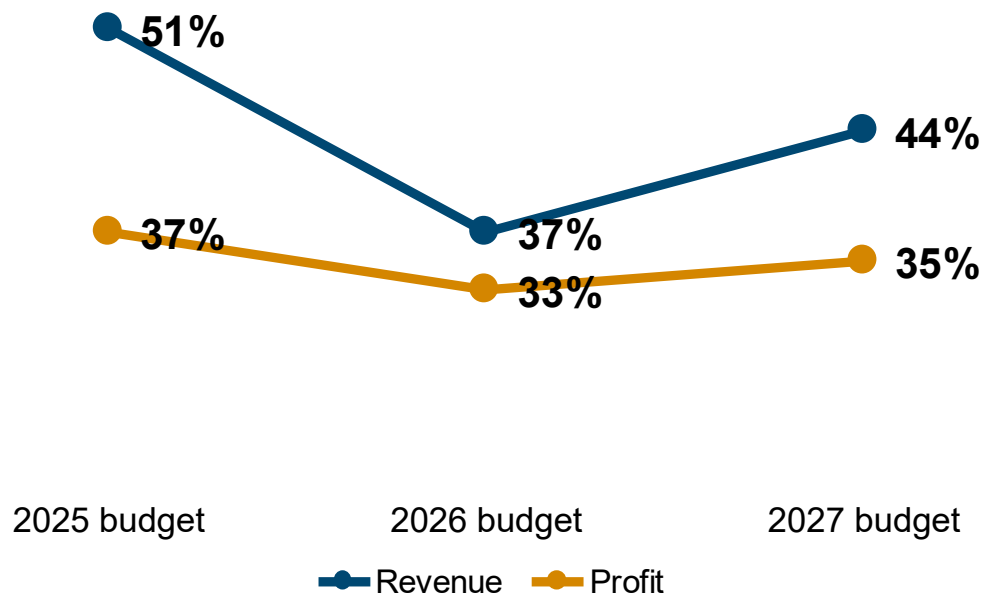
Romania



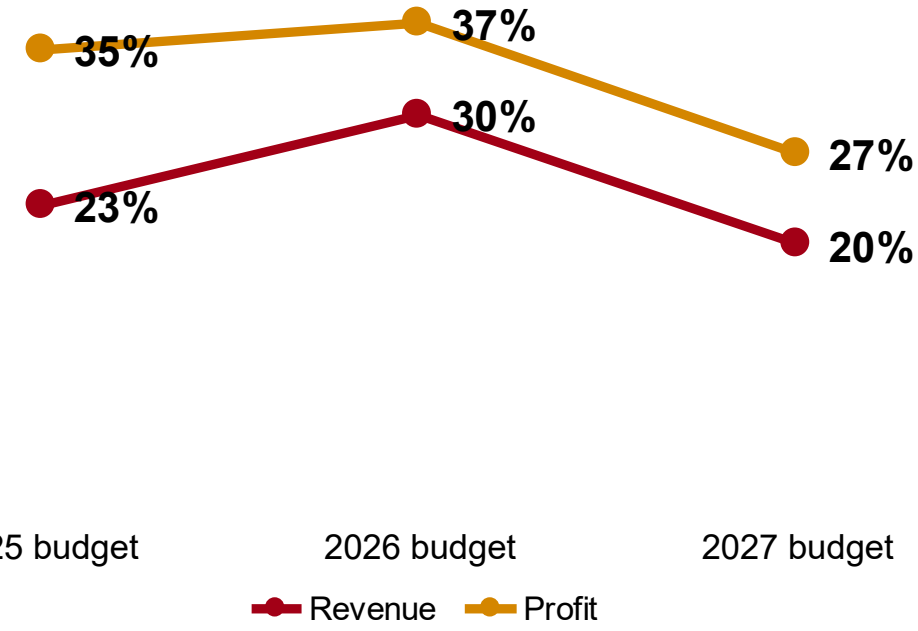
Ambition is back: growth targets have rebounded from last year's low.

What is your budgeted 2027 revenue and profit growth, year on year? (market by market, same bands in all three years)

Targeting growth of +6% or more: share of market answers

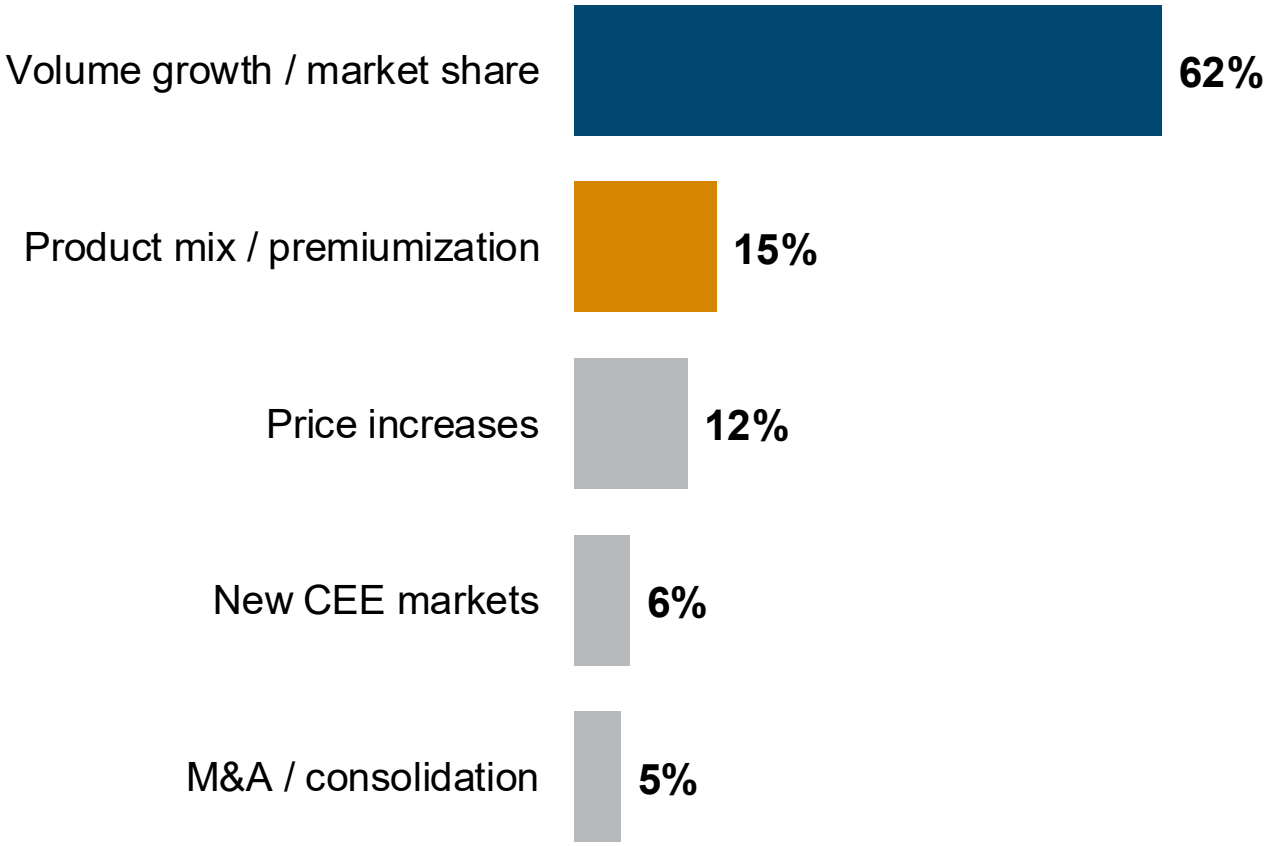


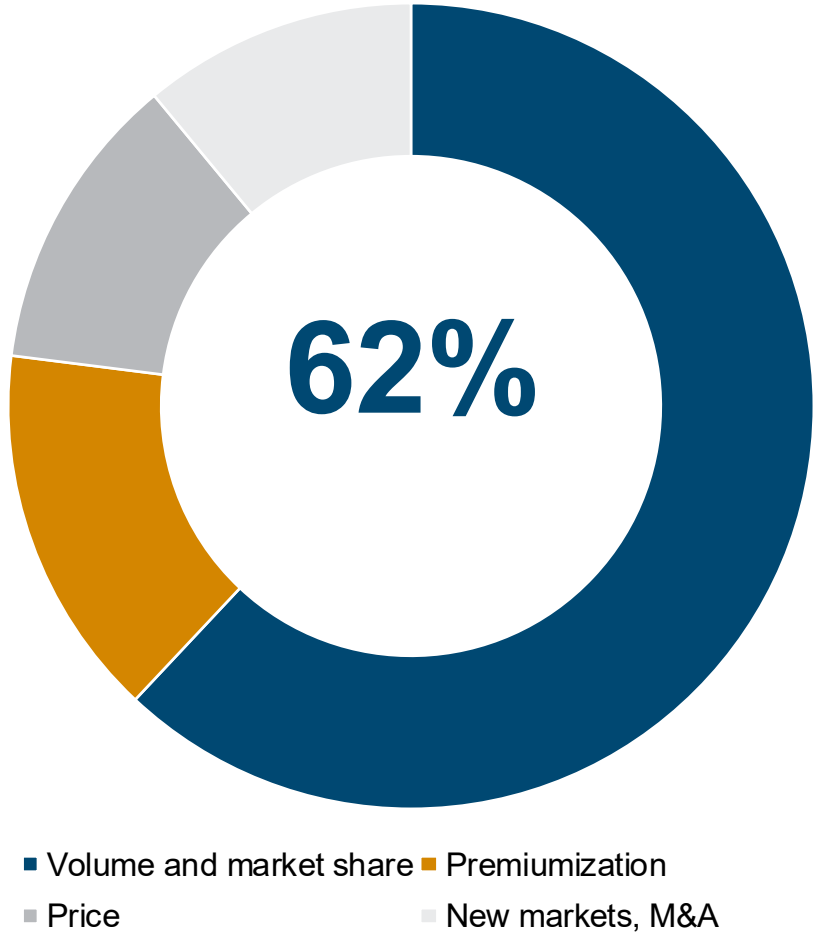
Planning no growth or decline: share of market answers



Growth is planned in units and market share, not in price.

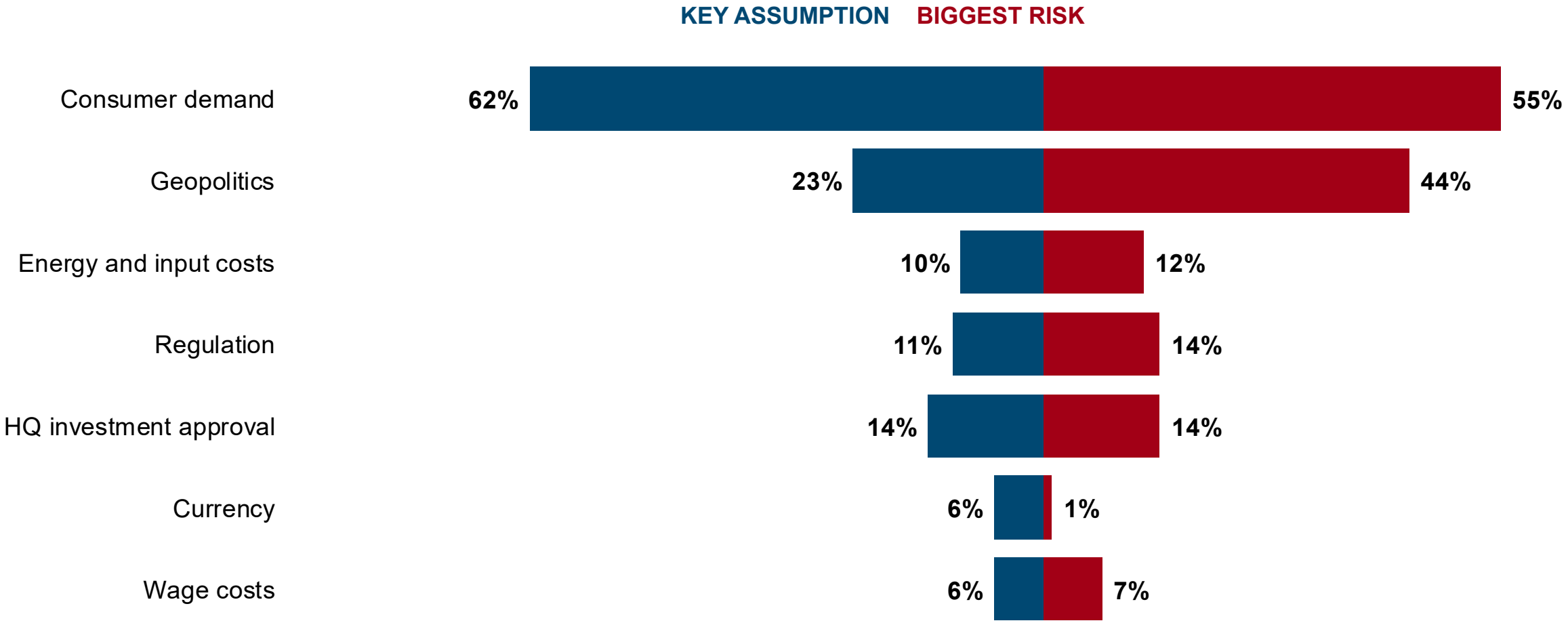
What is the primary driver of your forecasted 2027 revenue growth?





One assumption carries the region: the consumer. It is also the number one risk.

What is the most important assumption behind your 2027 budget, and the biggest risk to it? (up to two answers each)

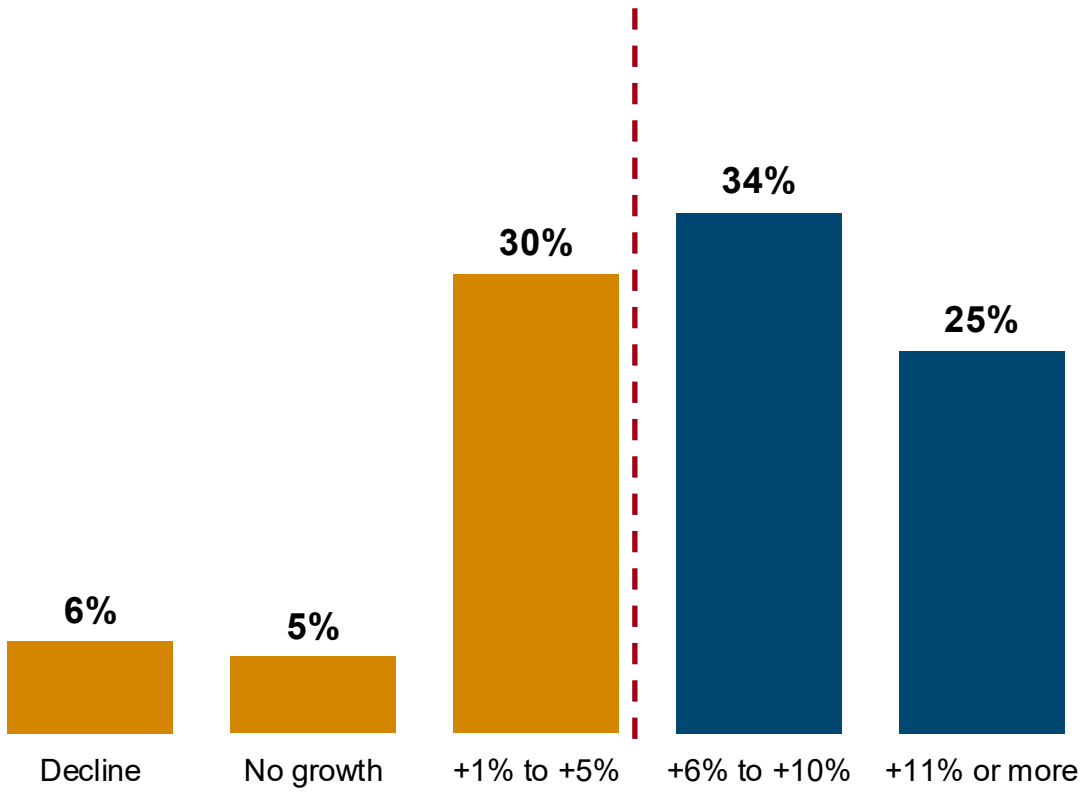


Two markets, two bars: Poland at about +6% nominal, Czechia at about +5%.

Budgeted 2027 revenue growth by market, next to each market's wiiw nominal-growth bar (share of market answers)

Poland

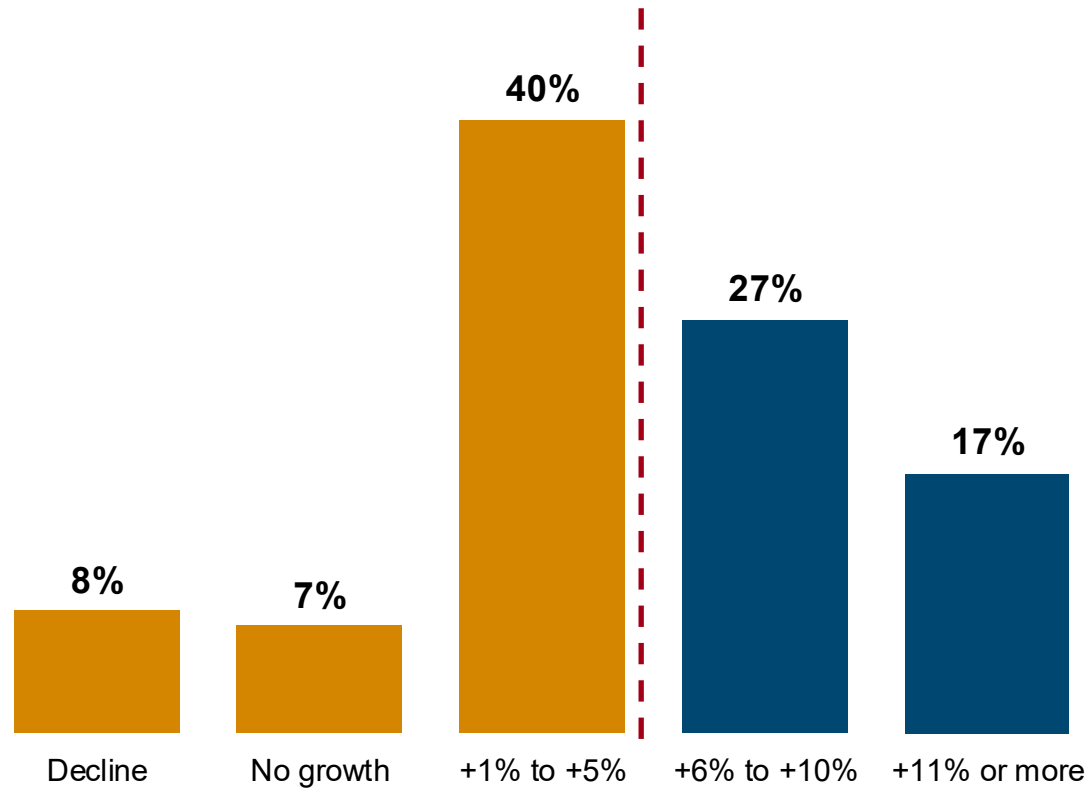
41% below the bar 59% above it



Polish market 2027: about +6% nominal (wiiw: GDP +2.9%, inflation +3.3%)

Czechia

55% below the bar 45% above it

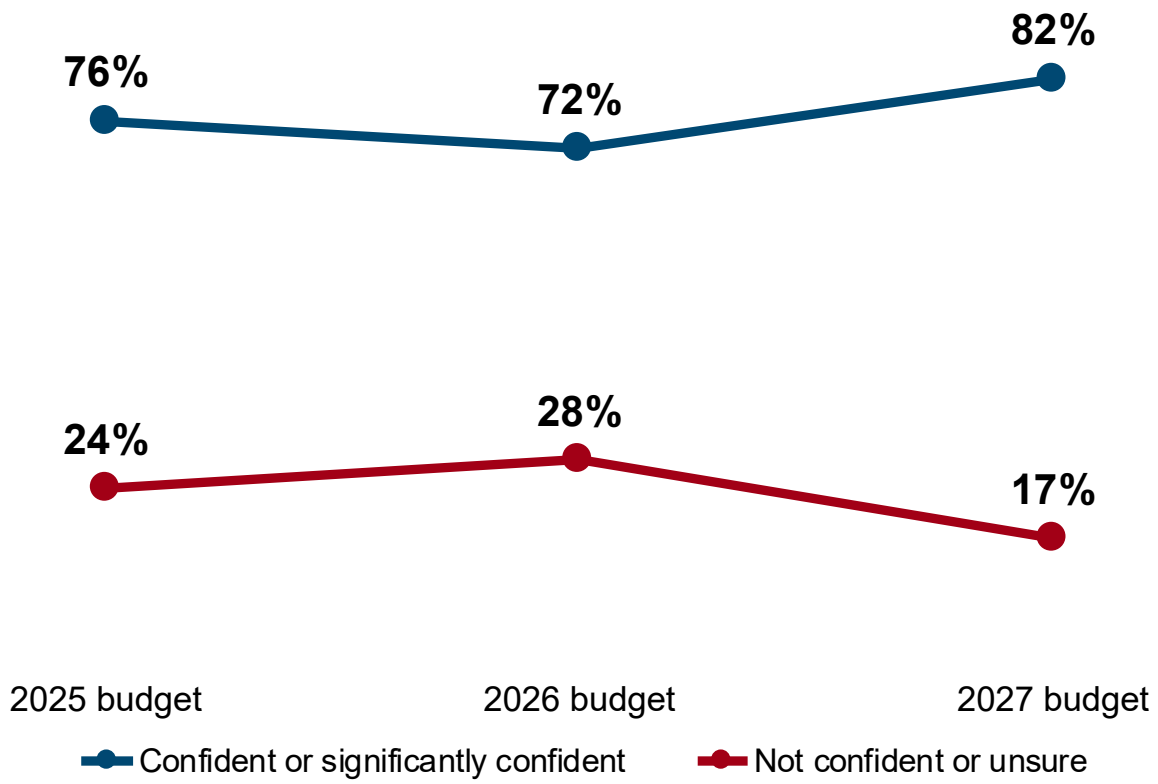


Czech market 2027: about +5% nominal (wiiw: GDP +2.3%, inflation +2.9%)

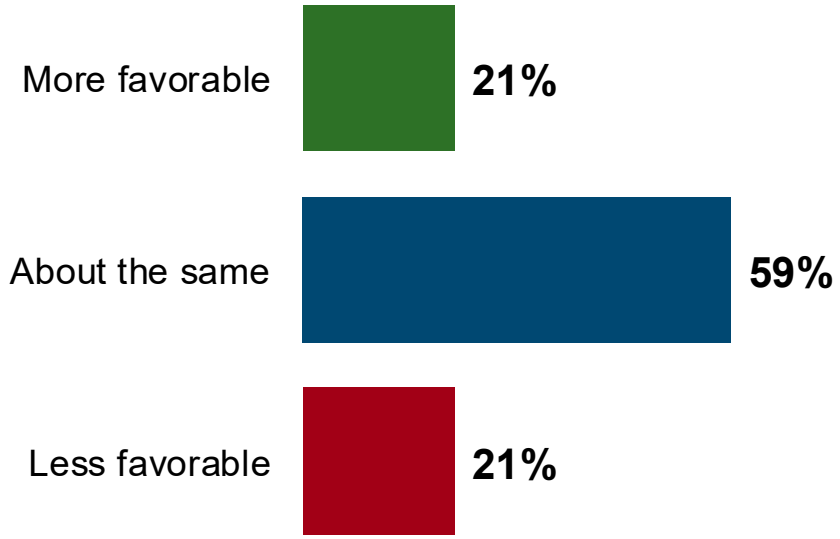
Confidence in hitting the budget is the highest in three years: 82%.

How confident are you that you will achieve your 2027 budgeted targets?

Share of executives



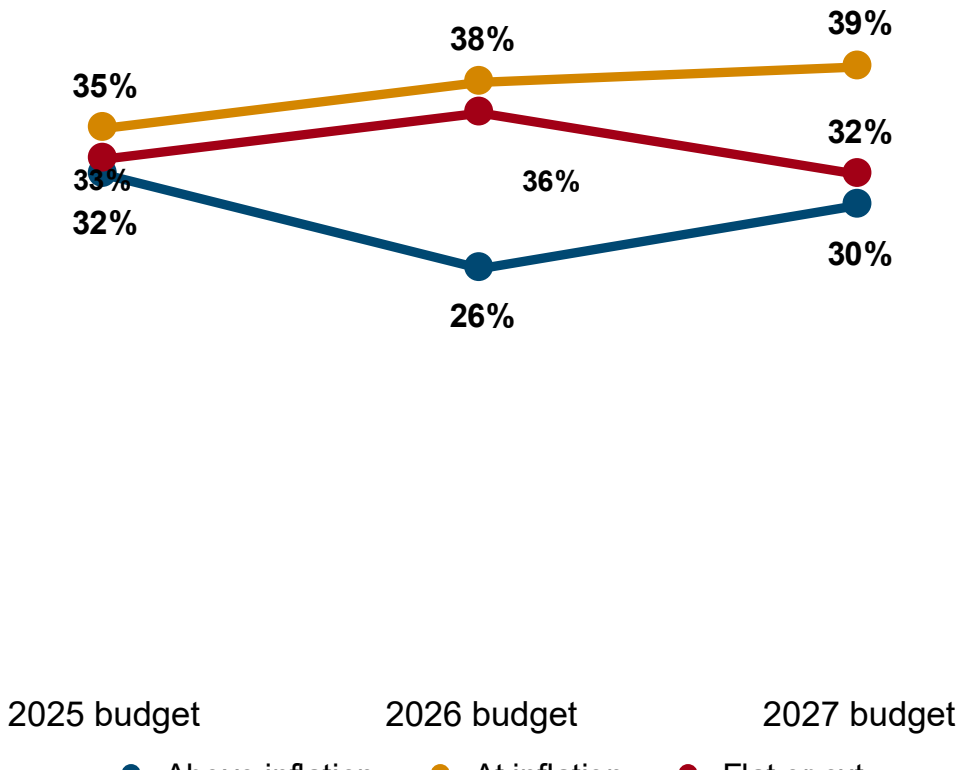
Is the 2027 budgeting environment better or worse than last year?



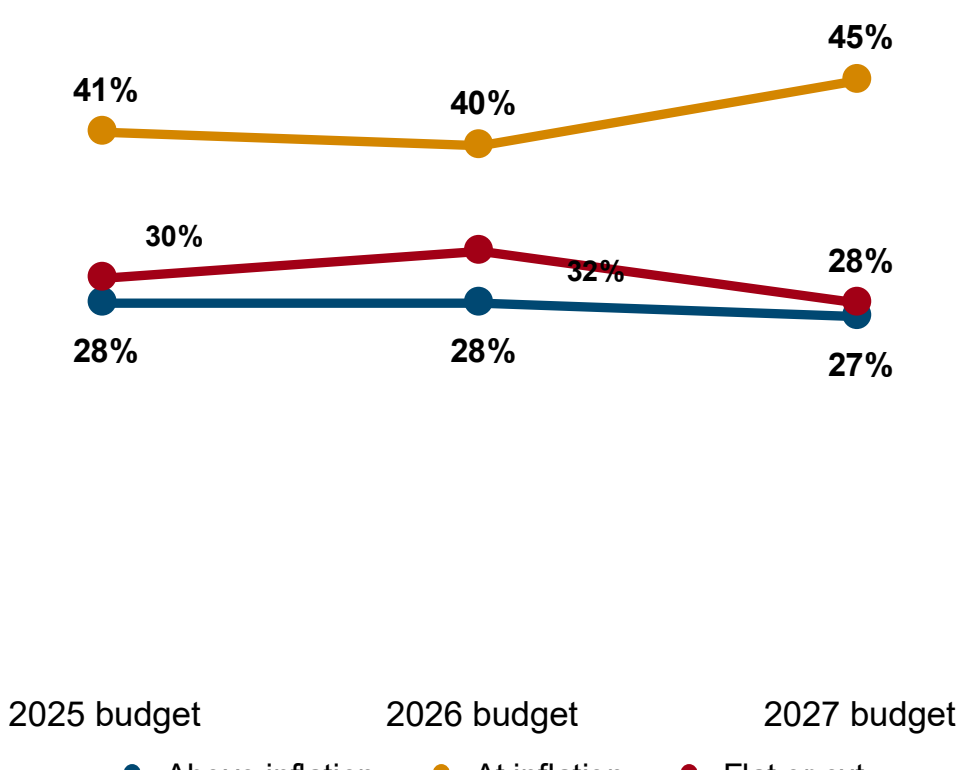
Wage discipline without wage cuts.

How will you change salaries in 2027 relative to local inflation? (CEE regional view)

Blue collar: share of market answers

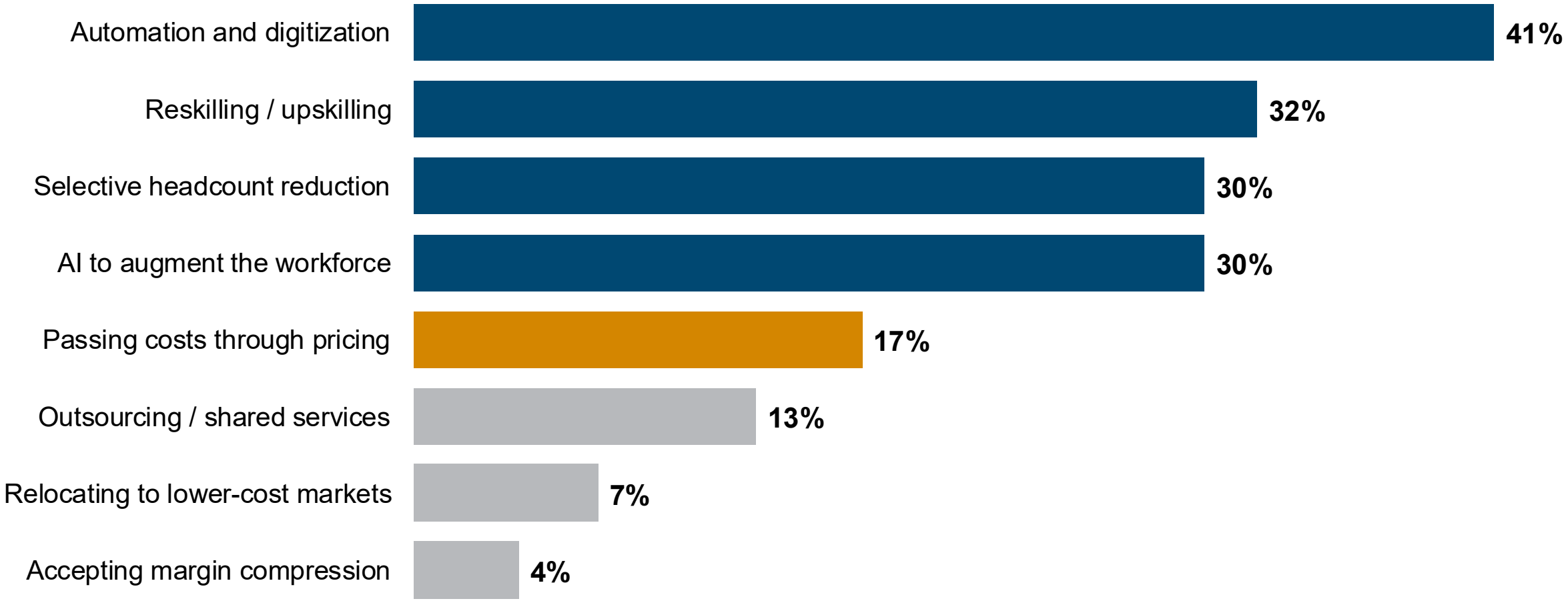


White collar: share of market answers



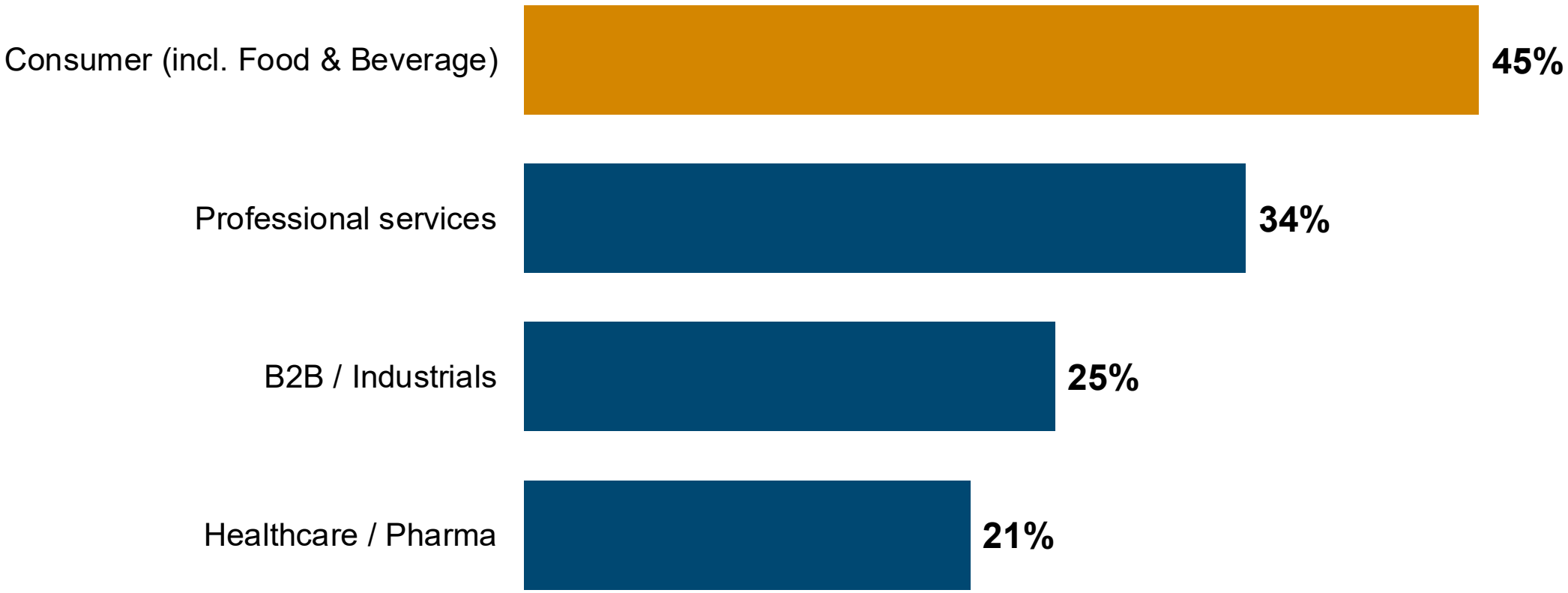
The answer to labor cost is productivity: automation, upskilling and AI, not pricing.

What is your primary strategy for managing labor cost increases in 2027? (up to two answers)



The investment follows the consumer.

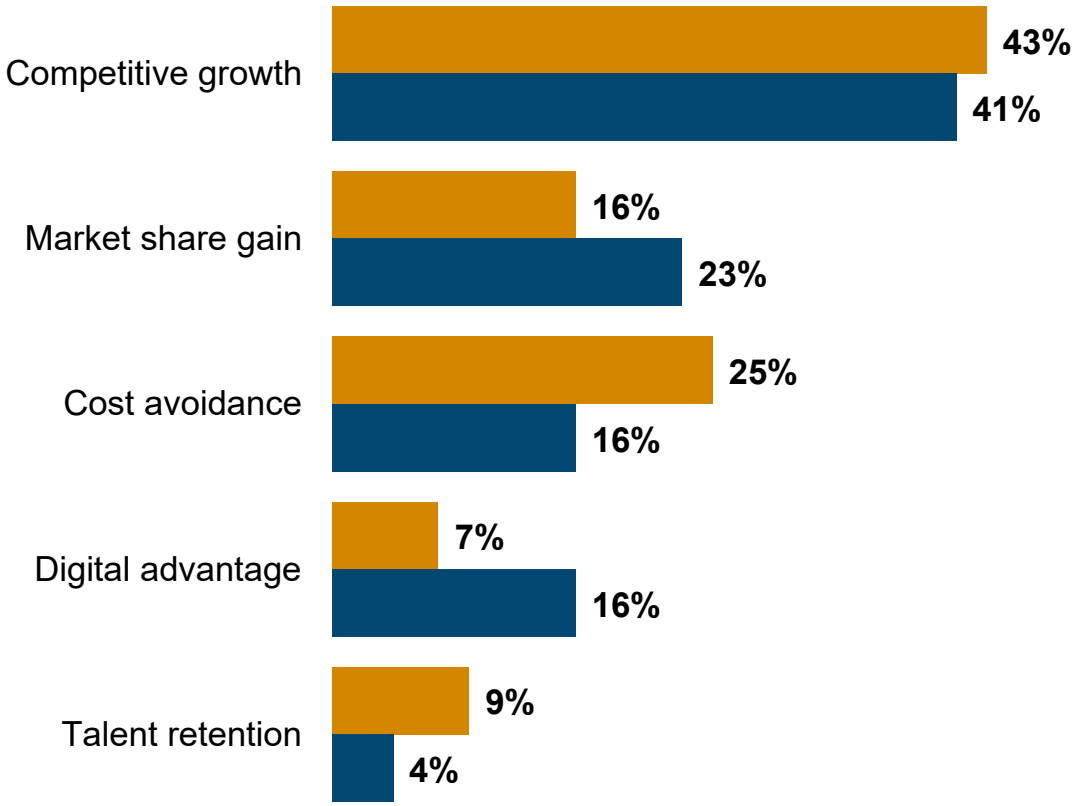
Will you increase or decrease investment in 2027? Share of market answers increasing, by respondent industry



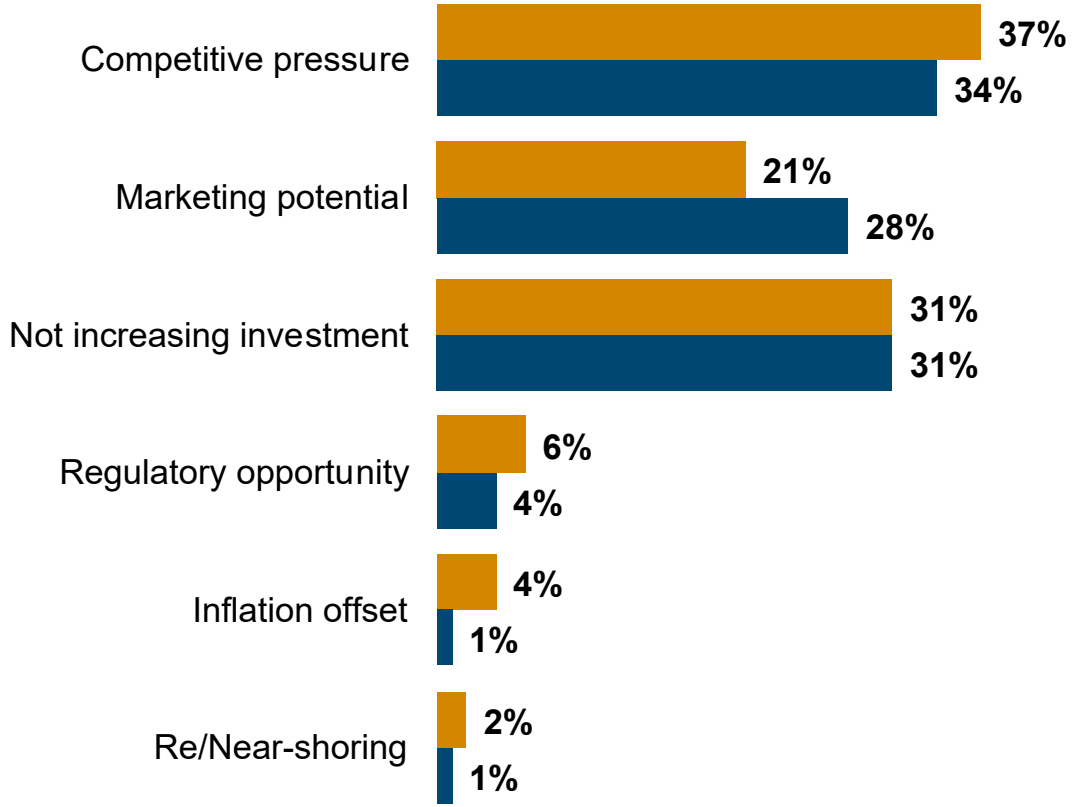
Across all industries: 31% of market answers increase investment in 2027, 59% hold, 10% decrease

The case made to HQ is shifting from cost avoidance to market share.

How do you summarize your investment case to HQ?

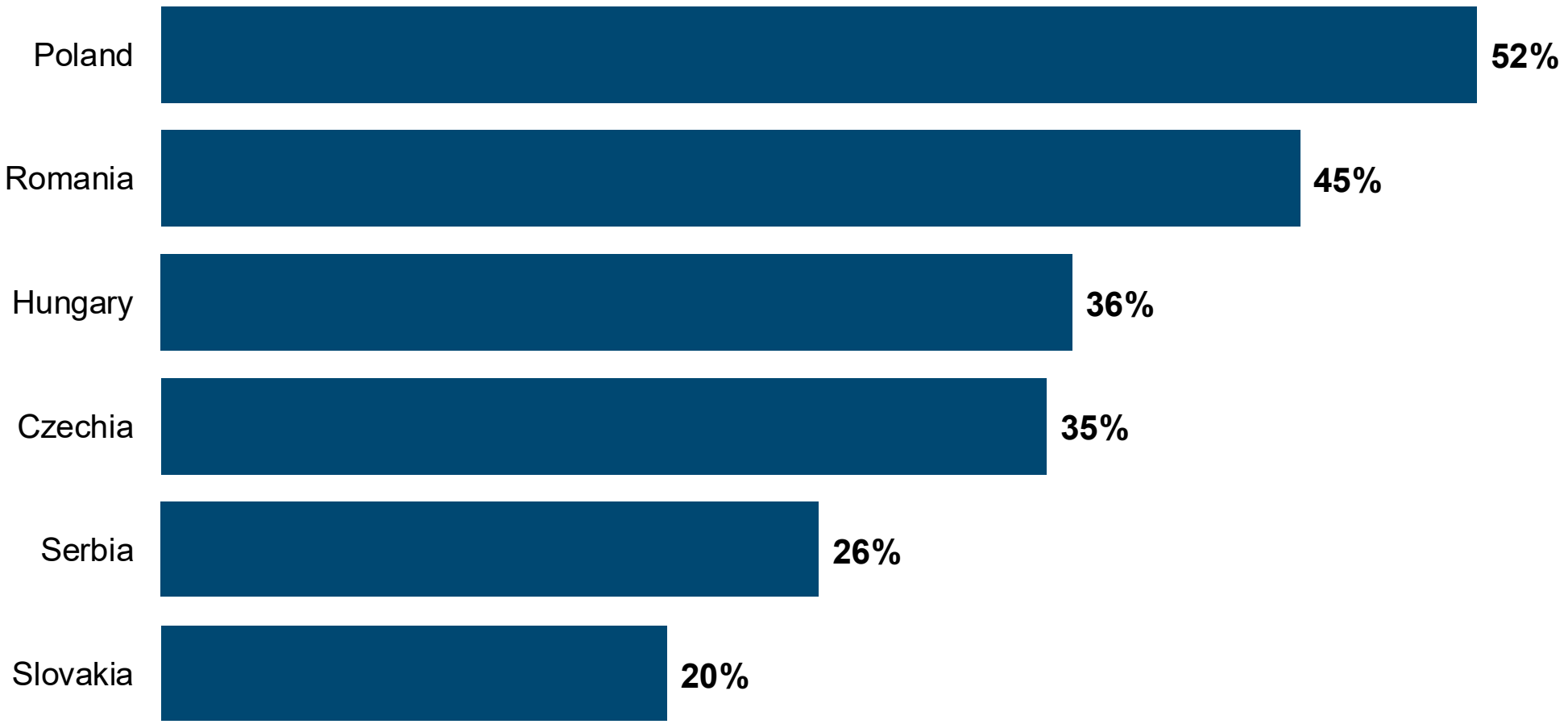


What is the main reason for increased investment?



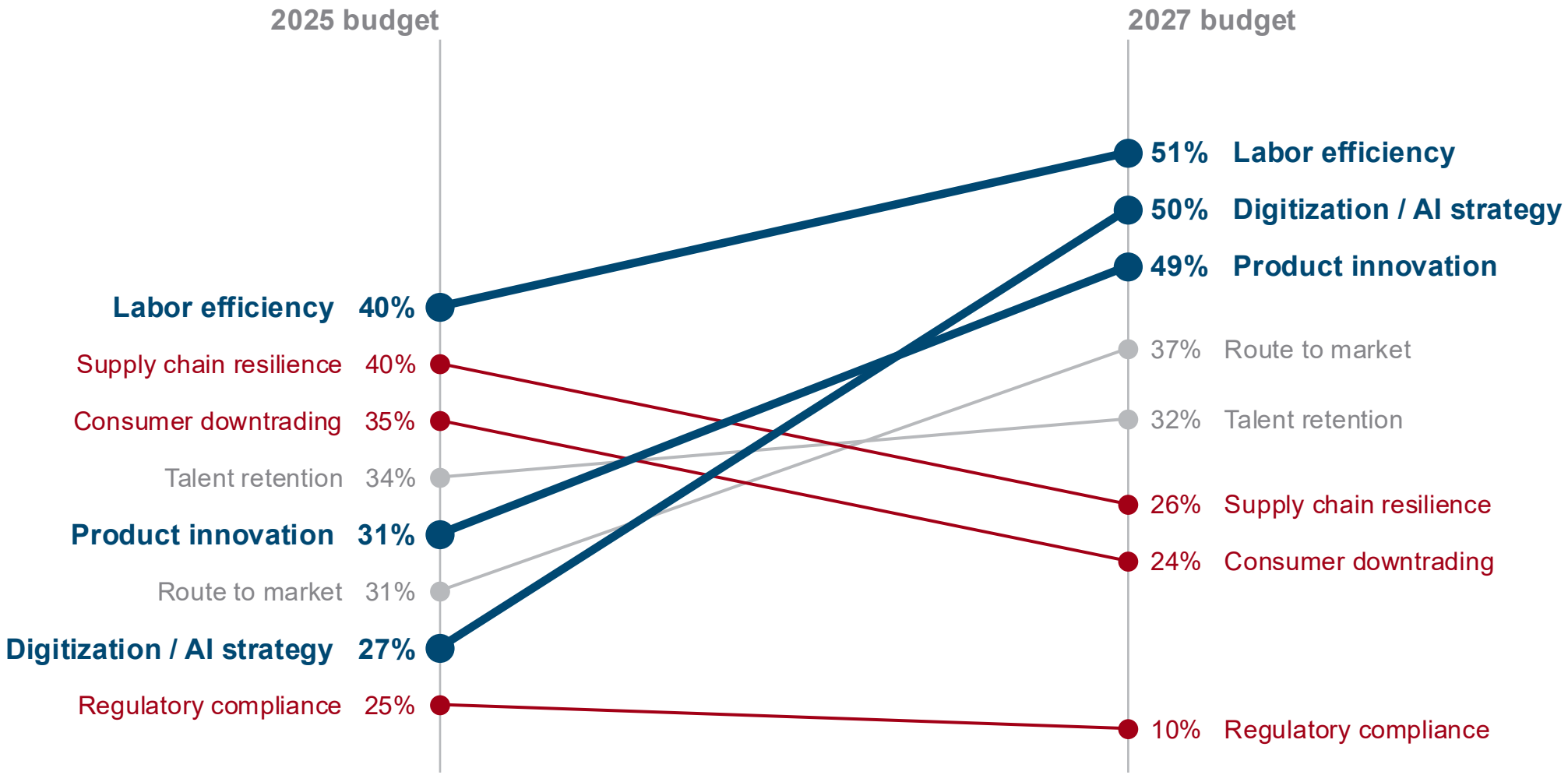
Where investment is going up in 2027.

Share of market answers increasing investment in 2027, by market



Priorities are flowing toward labor efficiency, digitization and product innovation.

What are your top three operational priorities? Share naming each, 2025 budget versus 2027 budget

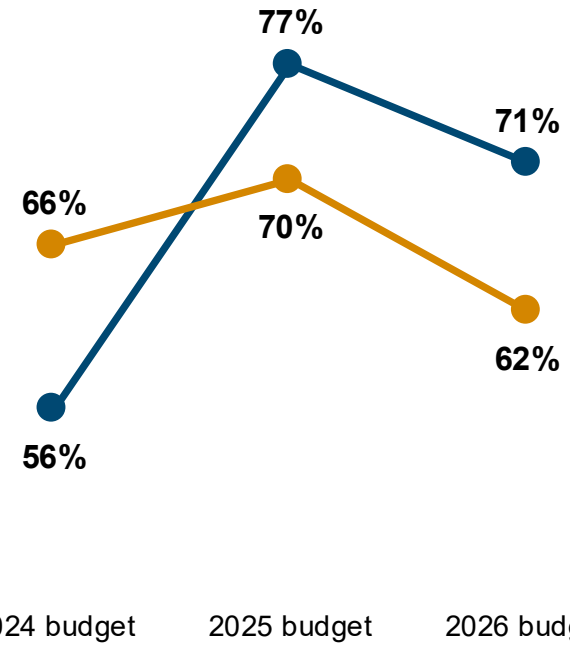


Czechia and Romania: the dependable performer and the ambitious rebound.

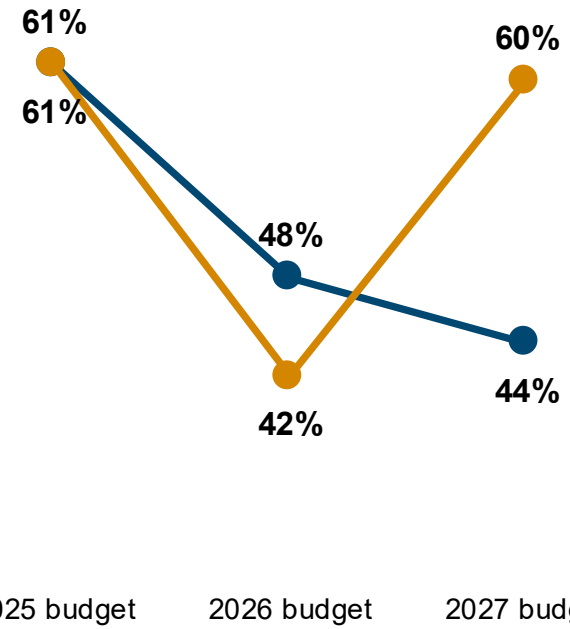
The data behind the benchmark: three-year view, market answers only

Czechia, the dependable performer · **Romania**, the ambitious rebound

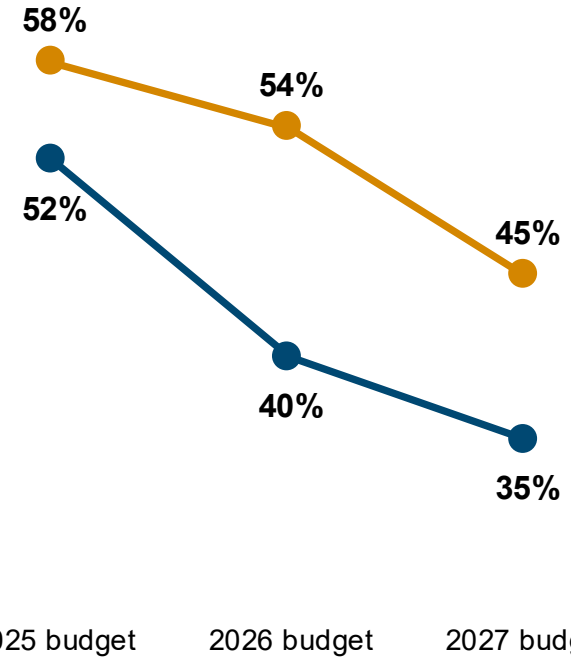
Met or beat the revenue budget



Targeting revenue growth of +6% or more



Increasing investment



Achievement panel reports the year in progress at each survey (2024-2026 budgets); target and investment panels are the budget being set (2025-2027).

Four points to ponder for the 2027 budget conversation

Ambition	• The whole region has moved back toward growth • Fewer budgets set for decline than a year ago
The consumer	• The key assumption is also the top risk • Plan for a baseline, an upside and a downside scenario
Labor cost	• Productivity, not price, is the offset: automation, upskilling, AI • Multi-year investments, not one-year cost lines
Investment	• The case is shifting from cost avoidance to market share • Competitive language lands better at HQ than cost language

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Thank you for your attention.

Fred Schneider, Managing Director

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