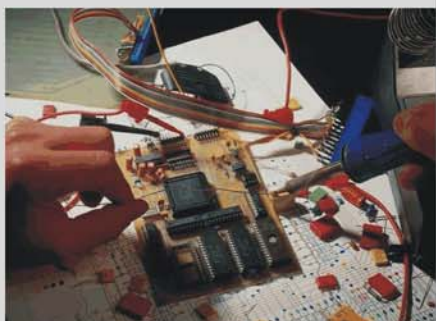


E POLAND'S **ELECTRONICS** INDUSTRY

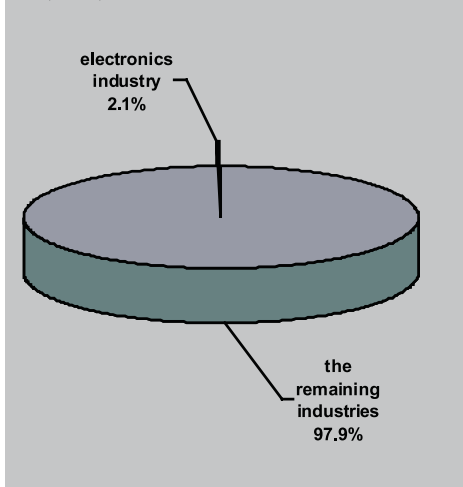


Polish Information and Foreign Investment Agency
www.paiz.gov.pl

KEY POSITIVE ELEMENTS IN POLISH ECONOMY AND ELECTRONICS INDUSTRY

- EU accession on 1 May 2004
- GDP growth rate [2007] = 6.6% (vs. 3.3% in EU 25)
- GDP growth forecast for 2008 = 4.3% (vs. 1.65% in EU 25)
- Decreasing inflation rate (from 4.3% in 2008 to 3.4% in 2009)¹
- 41% of the population of the new EU members
- Around 50% of Polish society is under 34 years of age
- the largest market in Central Europe, 8th largest in Europe and 30th in the world

Fig 1. The electronics industry's share in the generation of Poland's gross domestic product (GDP) in 2007²

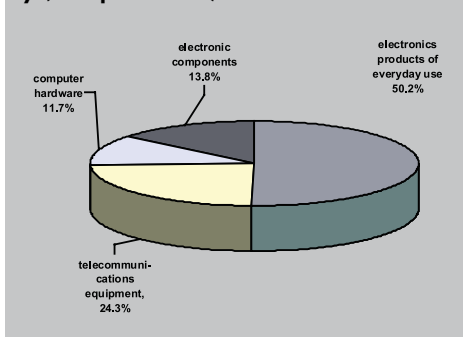


KEY INFORMATION ABOUT POLISH ELECTRONICS INDUSTRY

The electronics industry and market can be divided into 4 main segments:

- electronic products of everyday use,
- telecommunications equipment,
- computer hardware,
- electronic components.

Fig 2. Profile of the Polish electronics industry (sold production) in 2007³



The profile of the products supplied by the Polish electronic industry is dominated by electronic goods of everyday use, which account for over 50% of the total value of the industry's output. Telecommunications equipment forms the 2nd largest group of the electronics industry's products, with its share in the total value of the industry's output reaching over 24%.⁴

Polish electronics industry's sold production

years	EUR million
2003	2,450
2004	2,758
2005	3,275
2006	4,237
2007	5,392

The value of the Polish electronics industry's sold production came close to EUR 5.4 billion in 2007. Almost 90% of this value was accounted for by large and medium-sized enterprises.

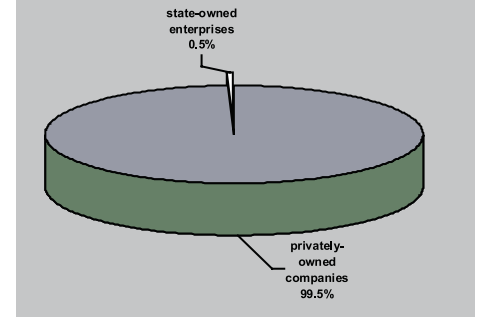
Polish electronics sector enterprises

There are 7,329 enterprises in operation in Poland which manufacture electronic products.

- Enterprises with more than 20 persons employed - jointly employ around 30,000 workers (2007).
- Companies with the participation of foreign capital play an important role in the Polish electronics sector. There were 327 such enterprises at the end of 2007. Among them are such well known international concerns as Thomson Tubes and Displays S.A., Royal Philips Electronics N.V., France Telecom, Alcatel-Lucent, Vivendi Universal, Siemens AG, Sharp, LG Philips LCD and Flextronics International.
- Electronics firms in which foreign capital is engaged belong, as a rule, to the group of large and medium-sized enterprises (employing more than 49 persons each), whereas the group of small firms consists mainly of Polish-owned enterprises.

Ownership profile of Polish electronics industry

Fig 3. Ownership profile of the Polish electronics sector in 2007⁶

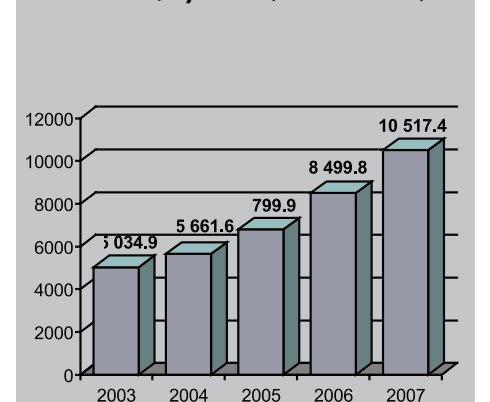


Owing to the reforms implemented in Poland the majority of enterprises from the electronics sector are private entities. They account for 99.5% of all firms operating in this sector.

Polish market of electronic goods

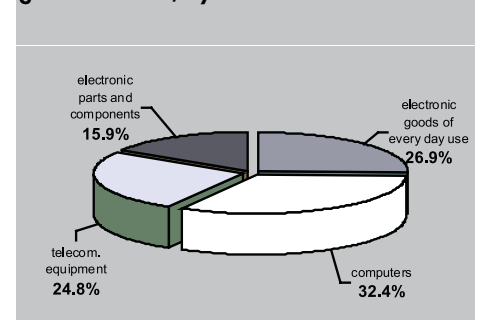
- In 2007 the value of the entire Polish market of electronic goods was over EUR 10.5 billion.

Fig 4. Polish market of electronics goods in 2003 – 2007, by value (in EUR million)⁷



- The largest segment of this market is the computer segment (32.4% by value). The second largest is electronic goods of everyday use – 26.9%.

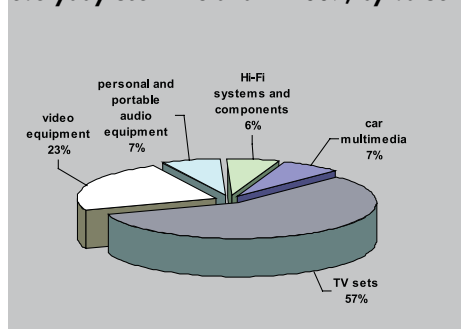
Fig 5. Profile of Polish market of electronic goods in 2007, by value⁸



Polish market of electronic goods of everyday use

According to Instytut Rynku Elektronicznego's estimates, in 2007 the sales of electronic goods of everyday use reached almost EUR 1.5 billion and rose by 21% (in comparison with 2006). By volume the market rose by almost 75%. The TV set segment remained the biggest product segment of this market with market share = 56.6%, mostly thanks to 29-inch (and larger) TV sets as well as LCD and plasma TV sets.

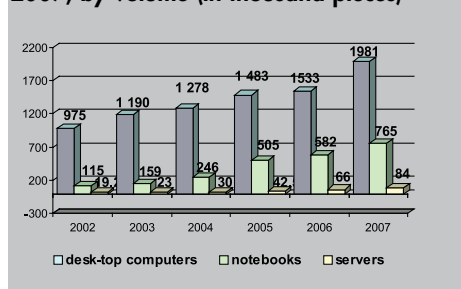
Fig 6. Sales profile of electronic goods of everyday use in Poland in 2007, by value⁹



Polish computer market

- In 2007 sales of computers (desk-top computers, notebooks and servers) on the Polish market were almost 2.85 million units. The quantitative growth in sales exceeded 28%.
- The highest growth, by over 31%, was recorded in the sales of note-

Fig 7. Sales of desktop and notebook computers and servers in Poland in 2002 – 2007, by volume (in thousand pieces)¹¹



book computers, which were 765,000 units.

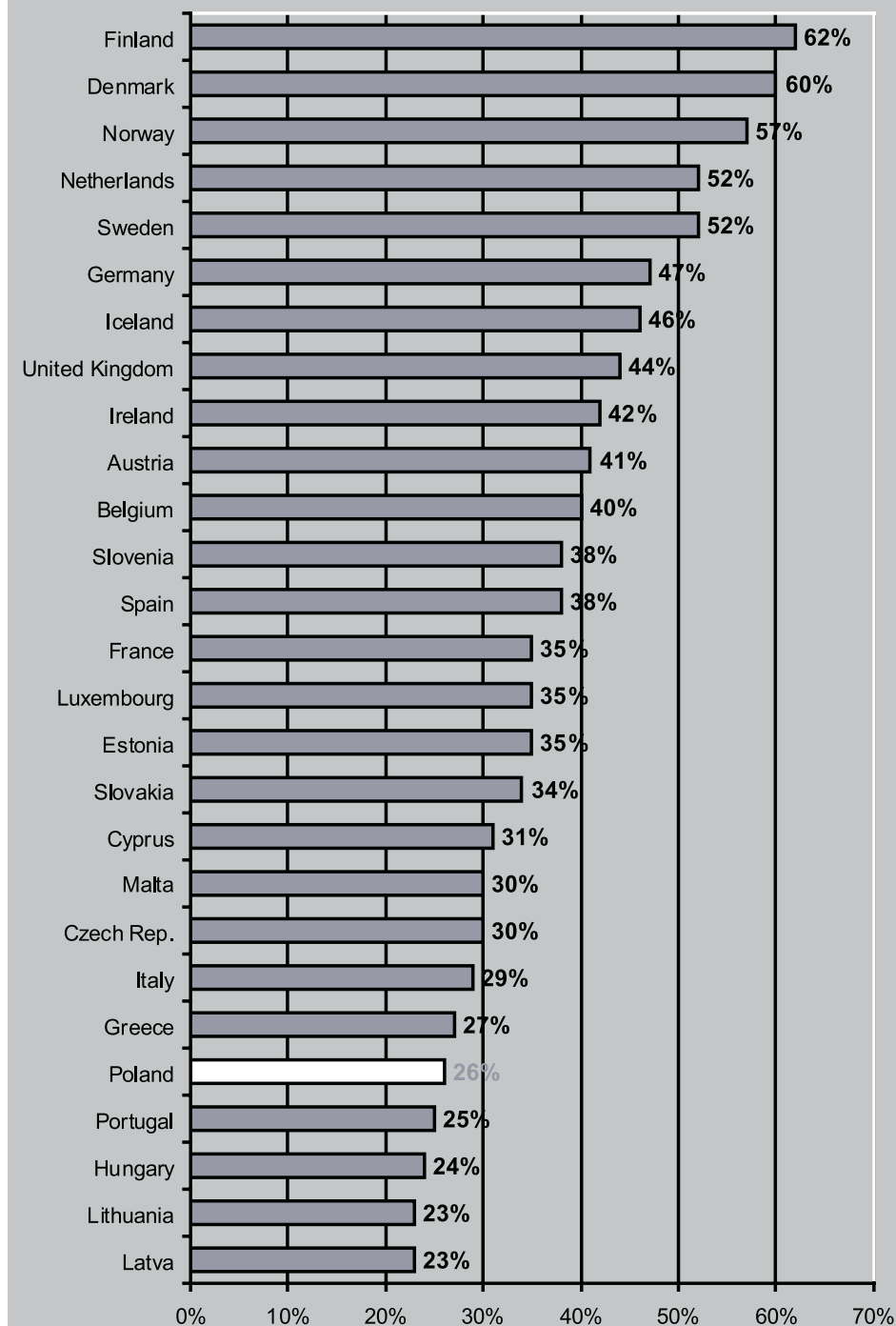
- Desk-top computers account for around 70% of the Polish market of personal computers, with sales in 2007 of nearly 2.0 million units.

Tab. 2 Polish market of electronic goods of everyday use, by value (in EUR million)¹⁰

	2002	2003	2004	2005	2006	2007
<i>Value in EUR million</i>	915	810	890	1,120	1,237	1,497

Comparison of ICT usage in enterprises in Poland and other EU countries

Fig 8. Employed persons' use of computers connected to the Internet in their normal work routine (as a percentage of the total number of employed persons) in 2007 in EU countries¹²



Polish telecommunications market

- In 2007 the value of the Polish telecommunications market (equipment, devices and services) reach almost EUR 13 billion. The growth rate was estimated at about 2.0% (compared with the previous year).
- The value of the total telecommunications equipment and devices market in Poland in 2007 (without telecommunications services) was almost EUR 3.5 billion.
- In 2007 the value of imported telecommunications equipment and devices reached almost EUR 2.5 billion.

Total telecommunications market in Poland in 2003 – 2007 ¹³

Years	2003	2004	2005	2006	2007
total telecommunications market [in EUR billion]	8.5	9.3	10.1	12.3	12.9
year / year		04/03	05/04	06/05	07/06
growth rate [in %]		9.0	8.1	3.9	1.9

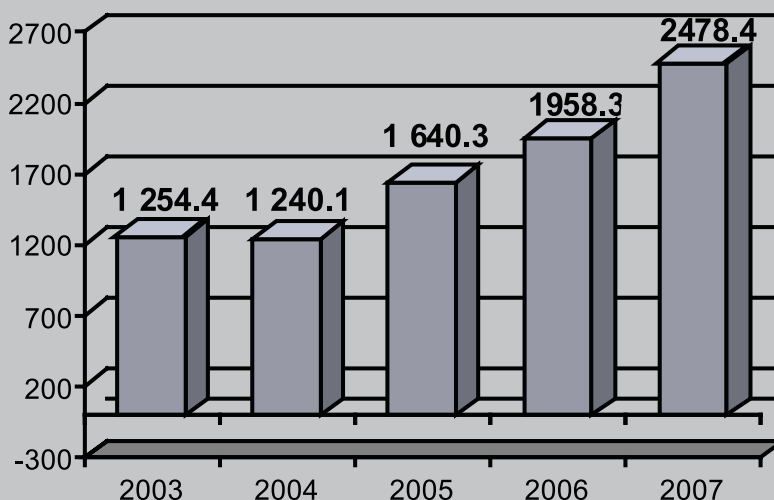
Total telecommunications equipment and devices in Poland in 2003-2007 ¹⁴

Years	2003	2004	2005	2006	2007
Total telecommunications equipment [in EUR billion]	2.78	2.86	3.24	3.37	3.49

Imports of telecommunications equipment and devices – Poland 2003–2007 [in EUR million], according to Polish Combined Nomenclature (PCN) ¹⁵

	2003	2004	2005	2006	2007
8517 - ELECTRICAL APPARATUS FOR LINE TELEPHONY, LINE TELEGRAPHY OR TELECOMMUNICATION	397.3	395.2	600.9	712.0	2,103.0
8525 - TRANSMISSION APPARATUS FOR RADIO-BROADCASTING OR TELEVISION, VIDEO CAMERA RECORDERS	857.0	844.9	1039.4	1,246.3	375.4
Total	1,254.4	1,240.1	1,640.3	1,958.3	2,478.4

Fig 9. Imports of telecommunications equipment and devices – Poland 2003–2007 [in EUR million], according to Polish Combined Nomenclature (PCN) ¹⁶



Polish market of electronics parts and components

- In 2007 the value of the Polish market of electronics parts and components was estimated at almost EUR 2.0 billion.

- Domestic manufacturers have a relatively low share in this market. At present, the production of TV tubes is the most concentrated segment of the entire Polish electronics industry. The other major segments (recording significant domestic production) are:

- production of printed circuits
- production of magnetic and inductive elements.

Value and growth rate of the Polish exports and imports of selected electronic components in 2007¹⁷

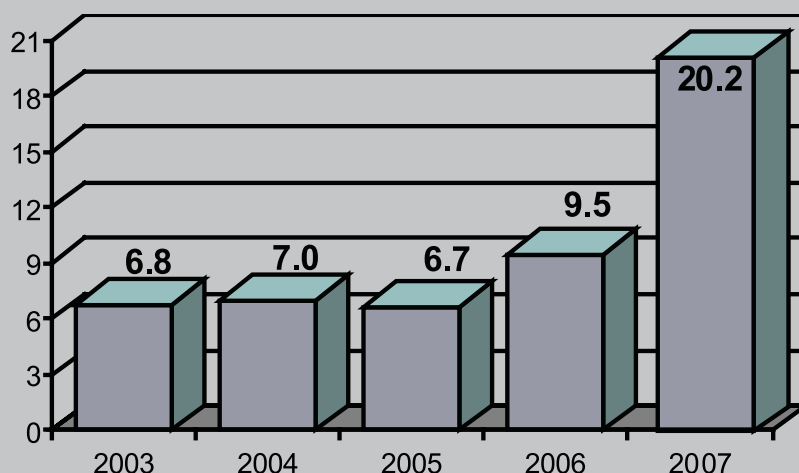
PCN code	Item	Exports		Imports	
		Value (EUR million)	Growth rate (%)	Value (EUR million)	Growth rate
8529	PARTS ASSEMBLIES FOR RECEIVING,RADAR APPARATUS, FOR RADIO-BROADCAST AND TELEVISION RECEIVERS	1,074	131%	2,055	- 6.3%
8534	PRINTED CIRCUITS	31.6	40.4%	163.4	15.7%
8536	ELECTRICAL APPARATUS FOR SWITCHING OR PROTECTING ELECTRICAL CIRCUITS FOR A VOLTAGE<=1000V	657.9	11.6%	791.1	12.4%
8539	ELECTRIC FILAMENT OR DISCHARGE LAMPS, ARC-LAMPS, ULTRAVIOLET LAMPS, SEALED-BEAM LAMP UNITS	611.3	18.2%	396.8	50.2%
8540	ELECTRON TUBES	97.5	-43.3%	70.0	-69.8%
8542	ELECTRONIC INTEGRATED CIRCUITS AND MICRO-SETS	66.4	-58.9%	688.1	-13.7%
	TOTAL	2,538.7		4,164.4	

Production of electronic goods of everyday use in Poland

- Poland is the largest manufacturer of TV sets among EU members (and second in Europe). In 2007 the Polish industry supplied 20.2 million TV sets. In Poland the leading manufacturers of TV sets are the international companies LG Philips, Funai, Sharp, Orion and Thomson.

- In 2007 almost all video equipment (video cassette recorders, DVD players and recorders, video cameras, etc.) and audio equipment (personal, portable, stationary and car audio devices) available on the Polish market were imported. The dominant brands on this market were Sony, Philips, Samsung, LG Electronics, Panasonic and Thomson.

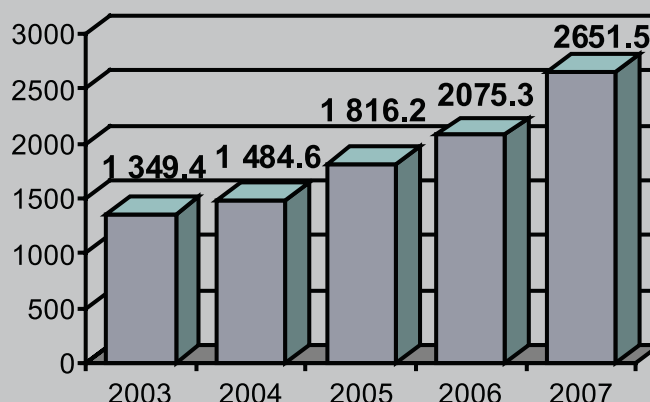
Fig 10. Production of TV sets in Poland in 2003 – 2007, by volume (in million pieces)¹⁸



Sold production of electronic goods of everyday use in Poland in 2003 – 2007, by value¹⁹

	2003	2004	2005	2006	2007
Sold production of electronic goods of everyday use [in PLN million]	5,934.2	6,731.02	7,310.97	8,083.07	10,030.28
Sold production of electronic goods of everyday use [in EUR million]	1,349.4	1,484.6	1,816.2	2,075.3	2,651.5

Fig 11. Sold production of electronic goods of everyday use in Poland in 2003 – 2007, by value (in EUR million)²⁰



Production of computers in Poland

- "Small assembly" is not registered by the Central Statistical Office (GUS) and thus is not reflected in the above data. The volume of "small assembly" is significant; according to Teleinfo 500, in 2007 it was about 1,094,100 pieces (compared with 872,000 in 2006). In this case, total production of computers in Poland in 2007 would be at the level of 1.6 million pieces (in 2006, 1.23 million pieces).

*Sold production of computers in Poland in 2003 – 2007, by value*²¹

	2003	2004	2005	2006	2007
Sold production of computers [in PLN million]	730.23	953.04	1,185.39	1,237.64	1,400.57
Sold production of computers [in EUR million]	166.0	210.2	294.5	317.7	370.2

Fig 12. Sold production of computers in Poland in 2003 – 2007, by value (in EUR million)²²

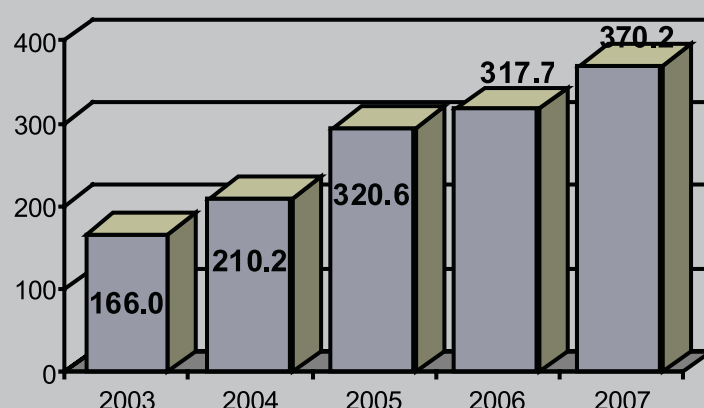
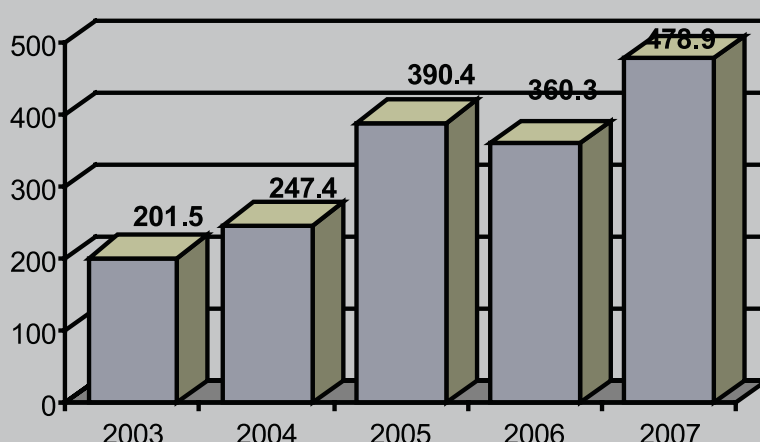


Fig 13. Production of computers in Poland in 2003 – 2007, by volume (in thousand pieces)²³



Production of telecommunications equipment in Poland

- The value of the domestic market of telecommunications equipment in Poland in 2005 was estimated at EUR 1,729.2 million.
- The value of the sold production of telecommunications equipment in Poland has been increasing till the end of year 2005 (from EUR 493.5 million in 2003 to EUR 744.9 million in 2005).

Since 2006 it started to decrease and by the end of 2007 it dropped by over EUR 200.0 million and amounted to EUR 542.9 million.

- The Polish market of telecommunications equipment has been practically monopolised by two foreign concerns: Alcatel-Lucent Technologies and Siemens.
- The Polish market of terminals is much more fragmented. There are the local manufacturers (Platan, Slican and DGT)

*Sold production of telecommunications equipment in Poland in 2003 – 2007, by value*²⁴

	2003	2004	2005	2006	2007
Sold production of telecommunications equipment [in PLN million]	2,170.33	2,788.45	2,998.35	2,542.34	2,054.08
Sold production of telecommunications equipment [in EUR million]	493.5	615.0	744.9	652.7	542.9

as well as foreign suppliers (Panasonic, Siemens, Alcatel, Ericsson and Avaya).

- On the Polish market of fixed-line telephones in 2006, there were practically only foreign suppliers: Doro Atlantel, Panasonic and Siemens. The mobile segment is divided among the world's largest concerns: Nokia, Alcatel-Lucent, Ericsson, Siemens and Motorola.

Production of electronic parts and components in Poland

- Although the domestic market is dominated by imports, there are several large plants in Poland manufacturing electronic parts and components. The most important represent foreign investment projects:

- Sharp, manufacturing LCD modules (located in Łysomice near Toruń)
- LG Philips LCD, manufacturing LCD modules (located in Kobierzyce)
- Videocon (factory sold by Thomson in 2005), manufacturing TV tubes (located in Piaseczno, near to Warsaw)
- Philips Ferpol and Ferroxcube, manufacturing magnetic elements (located in Skierniewice)
- Philips Lighting Poland S.A., manufacturing energy-conserving light bulbs (located in Piła)

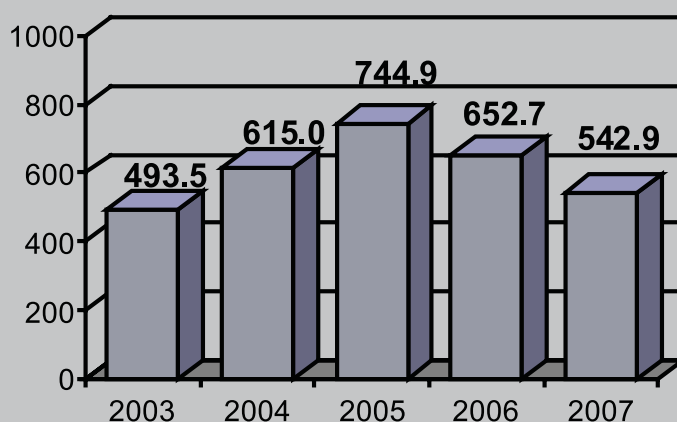
- The value of the domestic market of electronic parts and components in Poland in 2007 was EUR 996.1 million.

Polish imports of electronic products

- Poland imports much more in electronics goods than it exports. The value of imports is more than twice the value of electronics exports.

- In 2007 Poland imported electronics goods worth EUR 9,075.1 million. The growth rate (over 2006) was almost 12.0%.

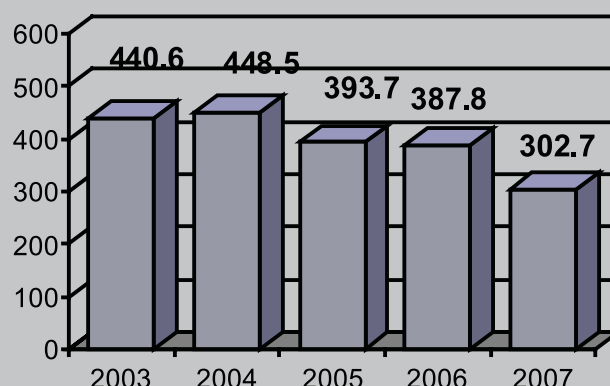
Fig 14. Sold production of telecommunications equipment in Poland in 2003 – 2007, by value (in EUR million)²⁵



Sold production of electronic parts and components in Poland in 2003 – 2007, by value ²⁶

	2003	2004	2005	2006	2007
Sold production of electronic parts and components [in PLN million]	1,937.78	2,033.67	1,584.92	1,510.56	1,145.15
Sold production of electronic parts and components [in EUR million]	440.6	448.5	393.7	387.8	302.7

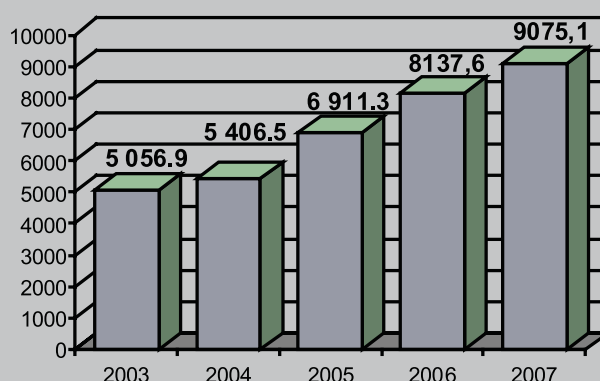
Fig 15. Sold production of electronic parts and components in Poland in 2003 – 2007, by value (in EUR million)²⁷



Polish imports of electronic products in 2003 – 2007, by value (in EUR million) ²⁸

Years	2003	2004	2005	2006	2007
Polish imports of electronic products [in EUR million]	5,056.9	5,406.5	6,911.3	8,137.6	9,075.1

Fig 16. Polish imports of electronic products in 2003 – 2007, by value (in EUR million)²⁹



Profile of electronics imports

- Telecommunication equipment and electronic goods of everyday use are the main commodity groups in Polish imports of electronic products. The value of telecommunication equipment imports was over EUR 2.4 billion (EUR 2,478.5 million), whereas the value of imports of electronic goods of everyday use exceeded EUR 2,250.1 million.

- In 2007 Poland imported electronic parts and components worth a total of EUR 2,245.5 million.

- In 2007 the value of imports of computers EUR 2.1 billion (EUR 2,101.0 million).

Main source of electronics imports:

- China,
- Germany,
- Far East (South Korea, Taiwan and Japan).

Polish exports of electronic products

- In 2005 Polish exports of electronics products exceeded EUR 5.0 billion. The growth rate exceeded 44.0 % (compared to 2006).

Profile of electronics exports

- In 2007 electronic goods of everyday use accounted for over 55% of overall Polish electronics exports. In 2007 the value of these exports exceeded EUR 2.8 billion (EUR 2,840.905 million). TV sets still remain the main export item. Poland exports about 90% of TV sets manufactured by its plants.
- Exports of electronic parts and components reached almost EUR 1.4 billion (EUR 1,385.8 million).
- Exports of telecommunications equipment were almost EUR 600 million (EUR 598.1 million).
- Exports of computers were EUR

Fig 17. Profile of electronics imports in 2007 in Poland³⁰

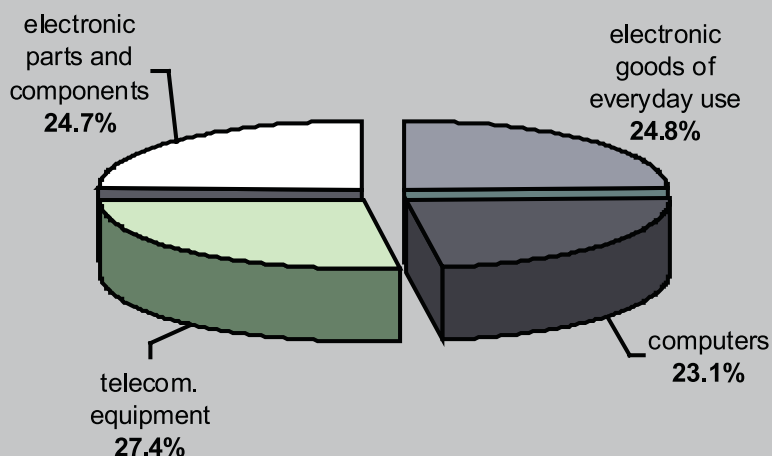


Fig 18. Polish exports of electronic products in 2003 – 2007, by value (in EUR million) ³¹

Years	2003	2004	2005	2006	2007
Polish exports of electronic products [in EUR million]	2,471.5	2,503.1	3,386.8	3,517.6	5,077.9

Fig 19. Polish exports of electronic products in 2003 – 2007, by value (in EUR million)³²

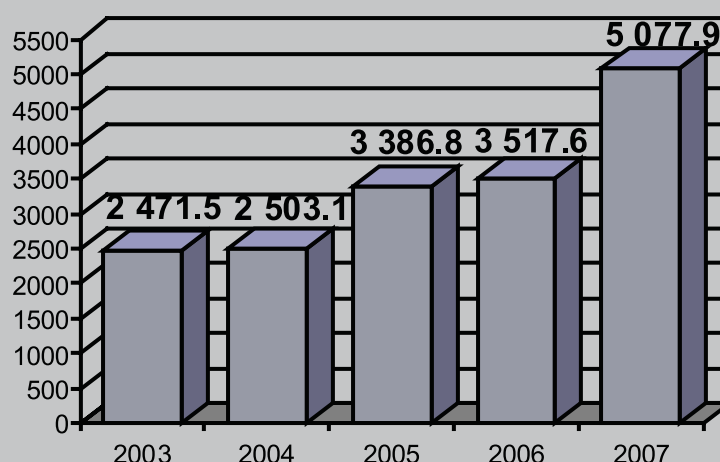
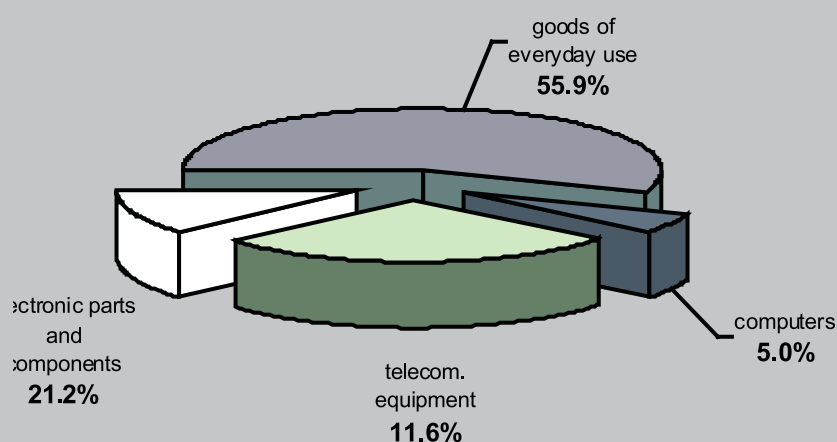


Fig 20. Profile of Polish electronics exports in 2007, by value³³



Main destinations of electronics exports:

- Germany,
- France,
- United Kingdom,
- the Netherlands.

Main exporters:

- manufacturers of TV sets: LG Electronics, Thomson (TTE) and Jabil,
- TV tube manufacturer: Videocon,
- LCD modules: Sharp, LG Philips LCD, Toshiba, Funai Electric, TPV Displays Polska,
- electronic components & devices: Philips (energy-saving lighting bulbs and magnetic elements).

Balance of Poland's trade in electronic products

- In 2007 Poland recorded a deficit in its foreign trade in electronic goods of EUR 3,997.2 million. This deficit was lower than in 2006 by over 13%.

Total balance of trade in electronic goods in 2003 - 2007³⁴

Years	EUR million
2003	-2,585.4
2004	-2,903.3
2005	-3,524.5
2006	-4,620.0
2007	-3,997.2

- A deficit is recorded for 3 out of the main 4 groups of electronic products in the Polish foreign trade. The highest deficit, exceeding EUR 1.8 billion, is recorded for computers and telecommunication equipment.
- A surplus is recorded only for electronic goods of everyday use, EUR 590.8 million.

Balance of Poland's trade in principal electronic goods in 2007³⁵

	EUR million
electronic goods of everyday use	590.8
Computers	- 1,847.9
telecommunications equipment	- 1,880.4
electronic parts and components	- 859.7
Total	-3,997.2

Foreign investment in the Polish electronics sector

- The Polish electronics market is one of the sectors that have attracted the largest amounts of foreign capital in the form of direct investment (FDI) over the last 15 years.

Major foreign investors in Polish electronics sector as of the end of December 2007 (in alphabetical order)³⁶

Investor name	Country of registration	Country of origin	Public comments
ABB	Switzerland	Sweden/Switzerland	Centrum Badawcze ABB Sp. z o. o. - Kraków; ABB Zamech Marine Sp. z o. o. - Elbląg; ABB Zamech Gazpetro Sp. z o. o. - Elbląg; ABB Sp. z o. o. - Warszawa; ABB Instal Sp. z o. o. - Warszawa
Aesculap AG	Germany	Germany	Aesculap Chifa Sp. z o. o. - Nowy Tomyśl
Alcatel	France	France	Alcatel-Lucent Polska S A - Warszawa
Daewoo	South Korea	South Korea	Polskie Towarzystwo Ubezpieczeń S.A. - Poznań; Daewoo Electronics Manufacturing Poland Sp. z o. o. - Pruszków; Daewoo Motor Polska Sp. z o.o.- w upadłości - Lublin
Daewoo Electronics CO ltd	South Korea	South Korea	Daewoo Electronics Manufacturing Poland Sp. z o.o.
Danfoss A/S	Denmark	Denmark	Sauer-Danfoss Sp. z o. o. - ; Danfoss Sp. z o. o. - Grodzisk Mazowiecki
Dell Computer Corporation	USA	USA	Dell sp. z o. o. - Warszawa
Digital View	China	China	Digital View sp. z o. o. - Koszalin
Dong Yang Electronics	South Korea	South Korea	Dong Yang Electronics Sp.z o.o. - Mława
Elbicon	Belgium	Belgium	Visitronics Spółka z o.o. - Warszawa
ENERSYS Holding	Luxembourg	Luxembourg	Energys S.A. - Bielsko-Biała
ENSTO SEKKO OY	Finland	Finland	Ensto Aspol Sp. z o. o. - Straszyn
Ericsson	Sweden	Sweden	Radomska Wytwórnia Telekomunikacyjna Dystrybucja Spółka z o.o. - Radom; Ericsson Sp. z o. o. - Warszawa
Exide Technologies	USA	USA	Centra S.A. - Poznań
Festo GmbH	Austria	Austria	Festo Sp. z o. o. - Raszyn
Finelectric BV	The Netherlands	The Netherlands	ZPEZ Sp. z o. o. - Zabkowice Śląskie; "ZNUT-FAEL" - Zabkowice Śląskie; Legrand Polska Sp. z o. o. - Zabkowice Śląskie
GEMPLUS S.A.	France	France	Gemplus Sp. z o. o. - Warszawa; Gemalto Sp. z o. o. - Tczew
General Electric Corporation (GE)	USA	USA	GE Wind Energy - Warszawa; GE Transportation - Rzeszów; GE TIP Sp.z o.o. - Gądk; GE Rail Services - Rzeszów; Globema Sp. z o.o. - Warszawa; GE Power Controls Sp.z o.o. - Kłodzko; GE Plastics - Warszawa; GE Oil & Gas - Warszawa; GE Multilin - Gliwice; GE Medical Systems Polska Sp. z o. o. - Warszawa; GE International S.A. O/w Polsce - Warszawa; GE Interlogix Polska Sp.z o.o. - Centrala - Gdańsk; GE Consumer Products - Warszawa; GE Capital Bank S.A. - Gdańsk; GE Maney Bank SA - Wrocław; Bently Nevada Poland Sp. z o. o. - Poznań
Heesung Electronics Co., Ltd.	South Korea	South Korea	Heesung Electronics Poland Sp. z o.o. - Kobierzyce
IBM Central Holding GmbH	Germany	USA	IBM Polska Sp. z o. o. - Warszawa
IFS Industrial and Financial Systems AB	Sweden	Sweden	IFS Poland Sp. z o. o. - Warszawa
Kimball Electronics Manufacturing Inc	USA	USA	Kimball Electronics Poland Sp. z o. o. - Poznań
Landis + Gyr	Switzerland	Switzerland	Landis + Gyr (Polska) Sp. z o. o. - Warszawa
Leonische Drathwerke	Germany	Germany	Leoni Kabel Polska Sp. z o.o.; Leoni Autokabel Polska Sp. z o. o. - Ostrzeszów
LG CHEM LTD	South Korea	South Korea	LG CHEM POLAND Sp. z o.o. - Kobierzyce
LG Electronics Inc	South Korea	South Korea	LG Electronics Polska Sp. z o. o. - Warszawa; LG Electronics Mława Sp. z o. o. - Mława
LG INNOTEK CO LTD	South Korea	South Korea	LG INNOTEK Poland Sp. z o.o. - Wrocław
Lucent Technologies Network Systems Netherlands BV	The Netherlands	USA	Lucent Technologies Poland Sp. z o. o.- Spółka jawna - Warszawa
Lucky SMT	South Korea	South Korea	Lucky SMT Poland Sp z o.o. - Wrocław
MacoPharma	France	France	Maco Pharma Polonia Sp. z o. o. - Wrocław
Motorola Inc.	USA	USA	Motorola Polska Sp. z o. o. - Warszawa; Motorola Software Group Poland - Kraków; Motorola Polska Electronics Sp. z o. o. - Kraków
Panasonic Europe LTD	United Kingdom	Japan	Panasonic Battery Poland S.A. - Gniezno
PartnerTech AB	Sweden	Sweden	Rok wejścia Inwestora do Firmy: 1993 PartnerTech Sp.z o.o. - Gdynia
Plati Elettroforniture Spa	Italy	Italy	Plati Polska Sp. z o. o. - Kwidzyn

Among the foreign concerns investing in the Polish electronics sector there are:

- manufacturers of TV sets and TV tubes: LG Electronics, Thomson (TTE, Videocon) and Philips/Jabil,
- manufacturers of electronic devices & components: Philips (energy-saving lighting bulbs and passive elements) ,
- manufactures of LCD modules: Sharp, LG Philips LCD, Toshiba, Funai Electric, TPV Displays Polska,
- foreign concerns investing in the Polish telecommunications services sector (France Telecom, Vivendi Universal) and telecommunications equipment sector (Alcatel-Lucent, Siemens).

Regulatory environment

The principal legal act governing business activity in Poland is the Economic Freedom Act of 2 July 2004. It regulates undertaking, running and closing businesses in Poland, as well as related tasks of the public administration.

For the electronics sector the EU directives RoHS and WEEE are very important.

Directive 2002/95/EC on the restriction of the use of certain hazardous substances in electrical and electronic equipment (RoHS) and Directive 2002/96/EC on waste electrical and electronic equipment (WEEE) are designed to tackle the fast-increasing waste stream of electrical and electronic equipment, and complement EU measures on landfill and incineration of waste. Increased recycling of electrical and electronic equipment will limit the total quantity of waste going to final disposal. Producers will be responsible for taking back and recycling electrical and electronic equipment. This will provide incentives to design electrical and electronic equipment in an more environmentally efficient way, which takes waste management aspects fully into account. Consumers will be able to return their equipment free of charge. In order to prevent the generation of hazardous waste, Directive 2002/95/EC requires the replacement of various heavy metals (lead, mercury, cadmium, and hexavalent chromium) and brominated flame retardants (polybrominated biphenyls (PBB) or polybrominated diphenyl ethers (PBDE)) in new electrical and electronic equipment put on the market from 1 July 2006.

Rauschert	Germany	Germany	Rauschert Mystakowice Sp. z o.o. - Mystakowice
Royal Philips Electronics N.V.	The Netherlands	The Netherlands	Philips Polska Sp. z o.o. - Warszawa; Philips Lighting Poland S.A. - oddział w Kętrzynie - ; Philips Lighting Poland - Piła; PHILIPS LIGHTING Poland S. A. oddział w Pabianicach - Pabianice; Philips Lighting Bielsko Sp. z o.o. - Bielsko-Biała; Philips Ferpol Sp. z o.o. - Skierniewice; Philips DAP Industries Poland Sp. z o.o. - Białystok
Sharp Corporation	Japan	Japan	Sharp Manufacturing Poland Sp. z o.o.
Sumitomo Electric Wiring System Europe Ltd.	United Kingdom	Japan	SEWS Polska Sp. z o.o. - Leszno SEWS Cabind Poland Sp. z o.o. - Żywiec
Telect Holdings	USA	USA	Telect Polska Sp. z o.o. - Wrocław
Thomson Tubes and Displays S.A.	France	India	Thomson Multimedia Polska Sp. z o.o. - Piaseczno
Toshiba Corporation	Japan	Japan	Toshiba Television Central Europe Sp. z o.o. - Kobierzyce

Legislation

- Directive 2002/95/EC of the European Parliament and of the Council of 27 January 2003 on the restriction of the use of certain hazardous substances in electrical and electronic equipment.
- Directive 2002/96/EC of the European Parliament and of the Council of 27 January 2003 on waste electrical and electronic equipment (WEEE).
- Directive 2003/108/EC of the European Parliament and of the Council of 8 December 2003 amending Directive 2002/96/EC on waste electrical and electronic equipment (WEEE).

RoHS and WEEE directives are in force across all 25 EU member states, plus Iceland, Liechtenstein and Norway.

The RoHS Directive came into force on 1st July 2006.

From 2007 manufacturers and retailers are responsible for recycling waste electrical and electronic products under WEEE (the Waste Electrical & Electronic Equipment directive).

- 1 Instytut Badań nad Gospodarką Rynkową estimates from October 2008
- 2 Source: Central Statistical Office (GUS)
- 3 Source: Instytut Rynku Elektronicznego (estimates based on official data published by GUS)
- 4 Source: official data published by the Central Statistical Office (GUS)
- 5 Source: Instytut Rynku Elektronicznego (estimates based on official data published by GUS)
- 6 Source: Central Statistical Office (GUS)
- 7 Source: Instytut Rynku Elektronicznego (estimates based on official data published by GUS)
- 8 Source: Instytut Rynku Elektronicznego (estimates based on official data published by GUS)
- 9 Source: Instytut Rynku Elektronicznego
- 10 Source: Instytut Rynku Elektronicznego
- 11 Source: Instytut Rynku Elektronicznego
- 12 Source: EUROSTAT, Community survey on ICT usage and e-commerce in enterprises
- 13 Source: European Information Technology Observatory 2007 (EITO), Telecommunication market in Poland in 2007, PMR
- 14 Source: European Information Technology Observatory 2007 (EITO)
- 15 Source: Central Statistical Office (GUS)
- 16 Source: Central Statistical Office (GUS)
- 17 Source: Central Statistical Office (GUS)
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- 26 Source: Central Statistical Office (GUS)
- 27 Source: Central Statistical Office (GUS)
- 28 Source: Instytut Rynku Elektronicznego (estimates based on official data published by GUS)
- 29 Source: Instytut Rynku Elektronicznego (estimates based on official data published by GUS)
- 30 Source: Instytut Rynku Elektronicznego (estimates based on official data published by GUS)
- 31 Source: Instytut Rynku Elektronicznego (estimates based on official data published by GUS)
- 32 Source: Instytut Rynku Elektronicznego (estimates based on official data published by GUS)
- 33 Source: Instytut Rynku Elektronicznego (estimates based on official data published by GUS)
- 34 Source: Instytut Rynku Elektronicznego (estimates based on official data published by GUS)
- 35 Source: Instytut Rynku Elektronicznego (estimates based on official data published by GUS)
- 36 Source: Polish Information and Foreign Investment Agency (PALiIZ)



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