PAIH
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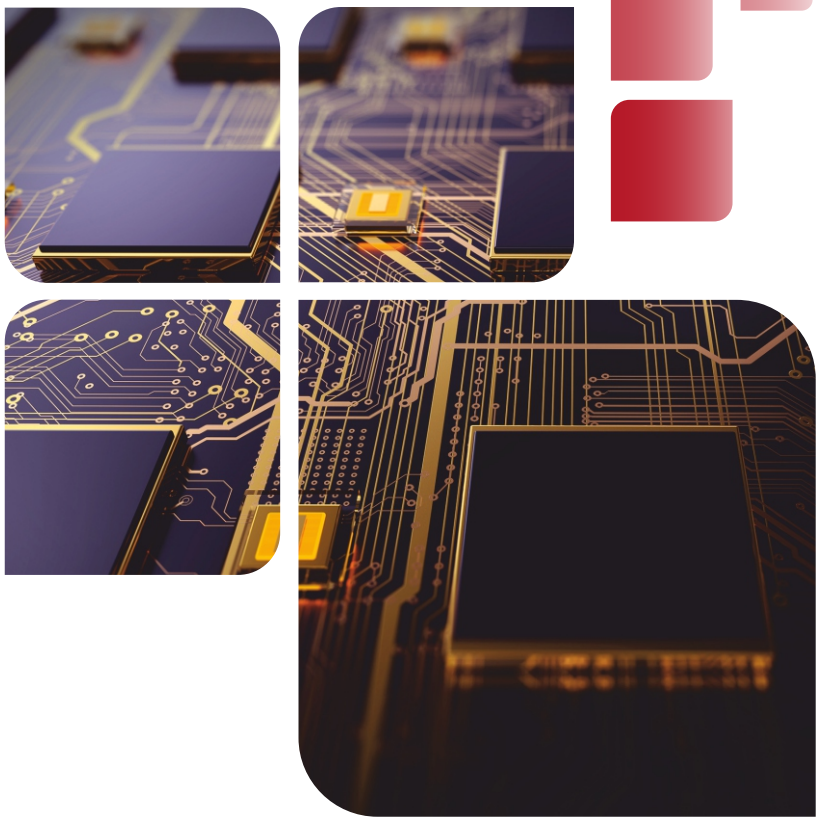
Poland.
Business Forward



Poland's National Pavilion

SEMICON Taiwan 2025
September 10 - 12, 2025

Published by the Polish Investment and Trade Agency

Warsaw, 2025

Why Poland?

Why Poland?

Largest inflow of foreign workers from outside the EU

THE CEE's REGIONAL LEADER

5th population in the EUROPEAN UNION

37+ mln CITIZENS

~ 62 % of the population at WORKING AGE

~9.6 mln Poles under the AGE OF 25

504+ thousand PERMITS ISSUED FOR EMPLOYMENT

Statistics Poland

STABLE AND STRONG ECONOMY

6th largest economy

Poland is the sixth largest economy in the European Union, closely behind Germany, France, Italy, Spain and the Netherlands

Unprecedented growth

Between 1990 and 2023, Poland's GDP per capita (in purchasing power parity) increased by approximately 209%

Resilient economy

Stable economic growth for the last 30 years
Over 10 years of stable growth in foreign trade turnover

Ratings remain high despite turbulent times

Moody's: A2 | S&P.: A- | Fitch: A-

RESISTANT TO CRISIS

Poland has only experienced a recession once since 1989 – in 2001 – and that one lasted just a few months. It was thanks to a diversified and competitive economy that Poland's GDP growth remained strong – even through the financial crisis of 2008.

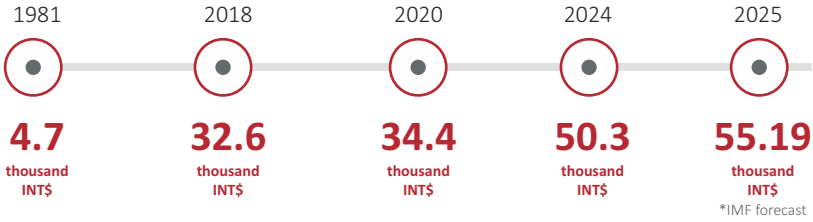
Despite ongoing international turbulence, Poland's economy continues to do well. In 2022, real GDP grew by approximately 4.9% compared to 2021, marking a solid recovery following the pandemic-related slowdown.

Even with increased regional tensions following the war in Ukraine, which led to an influx of over 1.5 million refugees and significant increases in defence spending, Poland maintained robust growth. This resilience was supported by strong domestic demand, exports and substantial inflows of EU funds dedicated to infrastructure and green energy investments.

MACROECONOMIC CERTAINTY

Poland is considered to be one of the most economically stable and fastest developing countries in the world, with real GDP rising by 2.9% in 2024 and projected to expand by 3.3% in 2025. Strong private consumption and investment continue to drive this robust growth. Poland has become the world's 20th-largest economy, and in 2026 is expected to exceed the $1 trillion mark in nominal GDP. This achievement represents a significant milestone in Poland's post-communist journey and highlights its rising role in the global economy.

GDP PER CAPITA (current prices, PPP INT$- international dollars)



GDP Growth 2013-2024 (constant prices)
(CAGR- compound annual growth rate)

~ +3,7%
annually

According to International Monetary Fund

The unemployment rate is one of the lowest in more than 30 years:

5,1%
December 2024

According to Statistics Poland

GENERAL GOVERNMENT GROSS DEBT (% of GDP)

48.8%
of GDP (2022)

49.7%
of GDP (2023)

55.3%
of GDP (2024)

60.7%
of GDP (2025, forecast)

According to International Monetary Fund

LARGE, HIGH-QUALITY TALENT POOL

300k+ of well-educated graduates annually
Academic Hub with over 1.2 million students
350k of well-educated graduates annually
20% engineering | technical majors

~23%
of total Poland's population
with higher education

Incentives in Poland highest levels in the EU:

CIT exemption,
between 12 and 15 years tax free in whole of Poland

Cash grants
for strategic projects

Real Estate Tax
exemption in many muncipalities

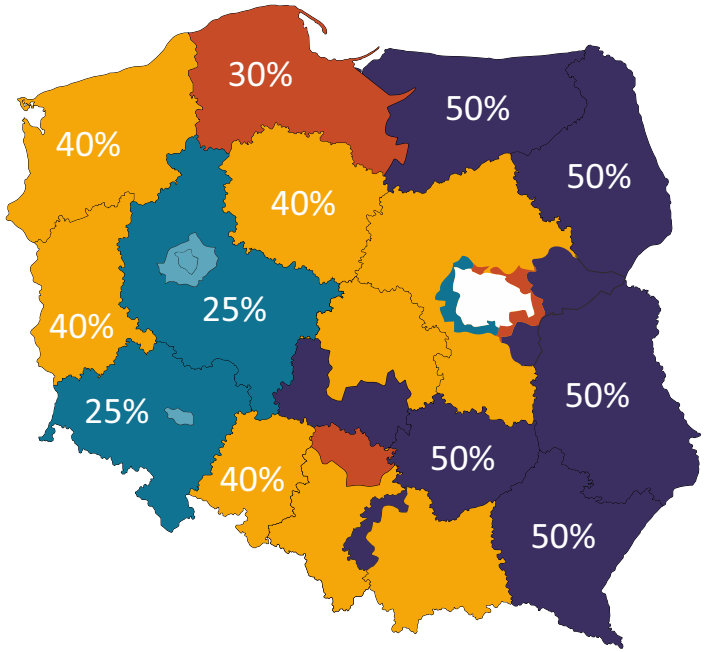
IP BOX 5% tax rate for income generated from intellectual property rights, one of the lowest of all developed countries

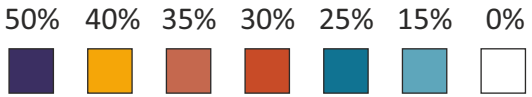
R&D Tax Relief
up to 200% of expences may be deducted from the tax base

EU funds – incentives for innovative projects, research and development, for low-carbon solutions

Other reliefs: prototype tax relief (30% of additional deduction from tax base), robotization tax relief (costs of purchase or leasing of new industrial robots used in the production proces), lump sum CIT (dedicated to companies and partnerships held by investors being natural person)

Maximum levels of support for 2022-2027 in different regions in Poland:



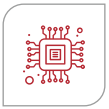


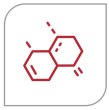
For more information scan the QR Code and go to „Doing Buissnes in Poland” guidebook:

The Polish Microelectronics and Photonics Industry

Due to multiple technological and business links the microelectronics and photonics in Poland is considered one wide industrial ecosystem. This is reflected in the name of the main research institute in this field: The Łukasiewicz-Institute of Microelectronics and Photonics, but most of all it is visible in the ever increasing cooperation between the companies operating on the market.

There are approx. 200 companies in Poland in the area of microelectronics and photonics, with 90% of them being small and medium sized private enterprises. The Polish microelectronics and photonics industry manufactures materials, components, devices, systems and applications. The industry is mostly export-oriented, with The Top 3 markets being: Europe, USA & Canada, Asia (excl. continental China).





Main products and services:

- IC and Photonic IC (PIC) design-services
- Compound semiconductor materials (EPI wafers, GaN, SiC, III-V)
- IR detectors & modules, quantum cascade lasers
- Industrial femtosecond lasers
- Quantum dots, OLED and PV materials
- Computer memory
- Printable semiconductors systems and materials
- Optical metrology devices and systems
- Special applications optics, thin film coatings
- Graphene and photonics crystals
- Specialty optical fibres

The Polish microelectronics and photonics industry has 4 strong development drivers:

- strong talent base
- successful industry & academia collaboration
- commitment to quality
- long-term business links with international partners.

Poland has a large pool of diversified talents with solid prospects for the future, being placed best in the EU in the percentage of female STEM graduates (43%) and successfully attracting IT and technology experts from abroad. There are 6 major academic hubs across the country with over 10 universities educating students and conducting research in microelectronics and photonics. Every year there are more university spin-offs and startups in these areas. The market leaders are also involved in close collaboration with several Polish and international universities.

The major companies in the industry have been present on the international markets for over 30 years. The Polish microelectronics and photonics industry is well recognised for its high quality and unique technologies. Products from Poland are successfully used in the most demanding applications on this and other planets- such as space exploration, EUV lithography, high-frequency trading and defence. New technologies are being tested by global market leaders for semiconductor integration, autonomous mobility or VR.

The industrial base is still expanding, with modern manufacturing plants being built across the country. Polish manufacturers facilities are being complemented by a growing number of global leaders such as Intel, LG, Corning or Trumpf. This trend will increase even more with new investments under the European Chips Act.

Industry integration and collaboration is supported by the Microelectronics, Electronics and Photonics Cluster - an industrial alliance recently established by major Polish businesses and research organisations.








microEPC
Microelectronics, Electronics and Photonics Cluster

Organizer of National Pavilion

Polish Investment and Trade Agency

EXPORT

Support for Polish exports with particular emphasis on SME's. In 2024, with PAIH support 600+ export contracts were signed, worth over 1,1 bn PLN

INVESTMENT

Facilitating investments in Poland and abroad, as well as support of FDI in Poland. In 2024, total declared projects value was 2,4 bn EUR. They will create 7,000 new jobs

PARTNERSHIP

Cooperation with public administration and business environment institutions in the implementation

Where Can You Find Us?

Network of Foreign Trade Offices (ZBH)

COMPANY NAME: Polish Investment and Trade Agency

WEBSITE : www.paih.gov.pl/en

FORM OF COOPERATION: Export and investment consultancy, partnership

PRODUCTS / SERVICES: We offer comprehensive services for entrepreneurs, combining industry competences with international experience. We help entrepreneurs select their optimal foreign expansion path, overcoming administrative procedures for specific projects, the development of legal solutions, finding a suitable location as well as reliable partners and suppliers

We are a leader in export and investment consultancy, operating on dozens of markets around the world. As the first contact point it is a partner for entrepreneurs on the domestic and foreign markets.

PAIH's mission is to increase the inflow of foreign direct investments to Poland, as well as supporting the internationalization of Polish companies. We operate both in Poland and through our Foreign Trade Offices (ZBH) abroad.

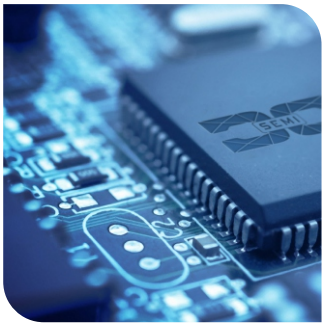
We are committed to promoting Poland and the Polish economy. We aim to increase the awareness of Polish brands on international markets. We promote national products and services, as well as Polish innovative information technology.

Companies at Poland's National Pavilion

COMPANY NAME:	AIUT
WEBSITE :	www.aiut.com
BUSINESS PROFILE:	Robotics and automation
FORM OF COOPERATION:	International trade and distribution, Joint Venture
PRODUCTS / SERVICES:	Automated, robotic workstations and production lines, Designing and turn-key execution of electrical works, automation, and production management systems, Process engineering, Electronic design and manufacturing, Automated intralogistics solutions, Mobile robots and intralogistics management systems

AIUT is a private Polish company and the largest integrator of industrial automation systems in Poland. With over 30 years of experience and a team of over 700 engineers, AIUT delivers innovative automation and robotization solutions globally. The company specializes in manufacturing processes, IT, and the Industrial Internet of Things (IIoT). AIUT operates in over 70 countries, equipping warehouses and logistics centres with automated storage, sorting, picking, and transportation systems. Their intelligent intralogistics system, Qursor, manages logistics and supervises AFORMIC F series robots, complemented by the Romotus system for resource localization and real-time monitoring.

COMPANY NAME:	DCD-SEMI
WEBSITE :	www.dcd.pl
BUSINESS PROFILE:	Semiconductors IP Cores
FORM OF COOPERATION:	International trade and distribution; R&D services; Joint Venture
PRODUCTS / SERVICES:	DCD-SEMI delivers digital IP cores for ASIC and FPGA designs, with over 100 architectures used in 1+ billion electronic devices since 1999. Our portfolio includes the world's fastest 8051 CPU, RISC-V processors with custom extensions, royalty-free IP, and automotive-grade CAN XL. We support both cutting-edge designs and End-of-Life (EOL) replacement. DCD-SEMI's IPs are silicon-proven, configurable, and tailored to project-specific needs, ensuring long-term performance and reliability



From legacy 8051 to modern RISC-V — we power your design.
DCD-SEMI delivers silicon-proven IP cores for embedded applications, from 8051 to RISC-V. Our portfolio supports legacy replacement (EOL) and future-proof designs across FPGA and ASIC. With over 25 years of experience, we meet ISO, Functional Safety, and cybersecurity standards. DCD's IPs are trusted by partners in Taiwan, Japan, USA, and the EU. We're active in MIPI Alliance, CAN in Automation, and CyberMadeInPoland.

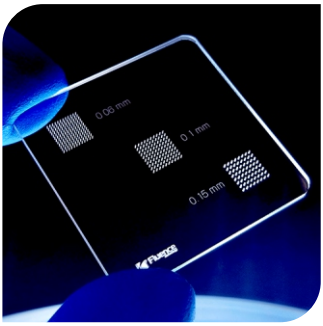
COMPANY NAME: Fluence Technology

WEBSITE : www.fluence.technology

BUSINESS PROFILE: Photonics

FORM OF COOPERATION: International trade and distribution, Joint Venture, Investment

PRODUCTS / SERVICES: Fluence Technology offers advanced femtosecond lasers, all featuring fast warm-up, long-term stability, and robust performance with an all-fiber SESAM-free oscillator. Jasper X1 laser is perfect for high-power microprocessing with Custom Envelope Burst, while the compact, cost-effective Jasper Micro is ideal for OEM applications



Fluence Technology excels in developing and producing femtosecond lasers with a unique all-fiber design, ensuring exceptional stability and performance for industrial applications. With a robust presence in the industry, Fluence has crafted fiber-based femtosecond lasers renowned for their oscillator stability, supported by the industry's first 5-year warranty.

Prioritizing quality and performance, Fluence's lasers are widely used in consumer electronics, semiconductor manufacturing, and display production. Their products are distributed in over 20+ countries, showcasing their global impact and reliability.

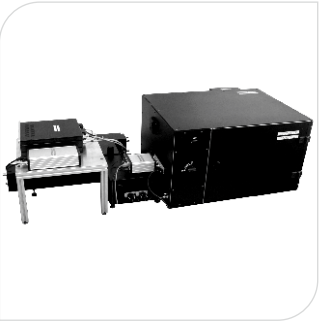
COMPANY NAME: Instytut Fotonowy

WEBSITE : www.fotonowy.pl

BUSINESS PROFILE: Photonics

FORM OF COOPERATION: International trade and distribution, Joint Venture

PRODUCTS / SERVICES: Kelvin Probe for work function and surface photo-voltage measurements, Photovoltaic spectrometer for full characterization of cells for solar panels, DSLA for contactless determination of defects in silicon wafers (in development)



We develop, design, manufacture and distribute worldwide scientific and industrial grade measuring instruments.

Some of them are used for semiconductor properties characterization. We are a leading force in areas of photo-electro-chemistry and in quantum efficiency measurements of materials for solar panels. We are also a rising force in work function measurements.

Currently we are developing a Defect Specific Lifetime Analyzer (DSLA) that is designed to solve the problem of in-line silicon wafer quality control. If successful, the device will help improve yield in semiconductor fabs that employ the most advanced manufacturing techniques.

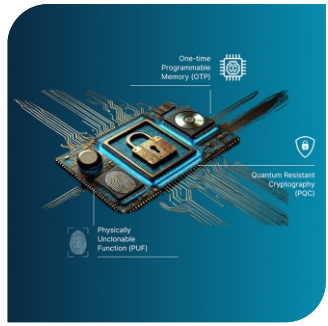
COMPANY NAME: Resquant

WEBSITE : www.resquant.com

BUSINESS PROFILE: Chip security&cryptography

FORM OF COOPERATION: International trade and distribution, Joint Venture, Commercial R&D services, Investment

PRODUCTS / SERVICES: Design and production of cryptographic hardware modules resistant to quantum threats. Production of HSM modules and Identify Friend-or-Foe (IFF) systems. Research and development in the fields of cryptography, integrated circuit architecture, and methods for counteracting side-channel attacks

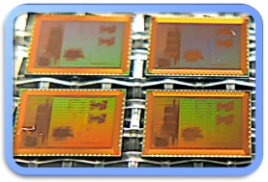


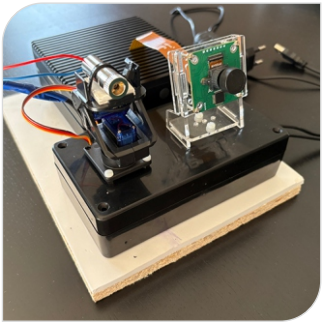
Resquant is launching a secure element chip designed for the next era of connected devices. Built on GF 22nm technology, it delivers hardware-based security for IoT, starting at the silicon level. It features unique keys baked into the hardware, a built-in Root of Trust, secure storage inside, and ultra-low power consumption. It supports secure authentication and encrypted communication across device networks. Scalable, standards-compliant, and easy to integrate—hard to break.

COMPANY NAME:	Semicon Supply Poland
WEBSITE :	www.semiconsupply.pl
BUSINESS PROFILE:	Semiconductor, Electronics, Microelectronics, Automation, Advanced construction, Engineering, Logistics, Staffing & HR, Consultacy (law & tax)
FORM OF COOPERATION:	International trade and distribution, Joint Venture, Investments, Services
PRODUCTS / SERVICES:	As a group of private Polish enterprises, we offer comprehensive support and tangible added value for technology partners planning to expand and localize their operations in Europe and the US

Semicon Supply Poland is an innovative ecosystem of companies dedicated to supporting the expansion of semiconductor and electronics businesses into Europe and the United States. Our mission is to connect businesses from Southeast Asia—particularly Taiwan and South Korea—with the technological strengths and opportunities offered by the Polish, European Union, and US markets. We believe that by working together and integrating the competencies of our members, we can deliver much greater value to our partners and achieve shared business objectives more effectively. we are committed to building long-term partnerships with companies expanding their production and services in the region. Our organisation's aim is to become the go-to solution for Europe's expansion, aligning with the growth of the semiconductor market. We are active in the fields of engineering, automation, implementation, construction, logistic, sales, staffing & HR, consultancy (law & tax), IT and more.

COMPANY NAME:	SEMIQA
WEBSITE :	www.semiqa.com
BUSINESS PROFILE:	Semiconductors
FORM OF COOPERATION:	International trade and cooperation, Joint Venture
PRODUCTS / SERVICES:	Analog Neural Network (ANNET), follower of military targets





SemiQa is a technology startup based in Wrocław, Poland, focused on pushing the boundaries of semiconductor technology through the development of advanced Analog Neural Network (ANNET). Company aims to revolutionize data processing by leveraging the unique advantages of analog computing architectures to overcome the limitations of digital systems (for e.g. von Neumann bottleneck). semiQa's core technology has been specially designed to deliver high power efficiency and improved latency compared to state-of-the-art digital AI accelerators. Their design philosophy centers on using analog signal processing to perform neural calculations directly in hardware, minimizing conversion overhead and reducing both energy consumption and response times for inference tasks.

COMPANY NAME: VIGO Photonics

WEBSITE : www.vigophotonics.com

BUSINESS PROFILE: Semiconductors

FORM OF COOPERATION: International trade and distribution

PRODUCTS / SERVICES: VIGO Photonics develop products dedicated to customer's applications in the following fields: industry (laser power control), environmental protection (gas analysis, water quality control), transport (analysis of temperature distribution in fast-moving objects), defense and security (smart munitions, early warning systems)

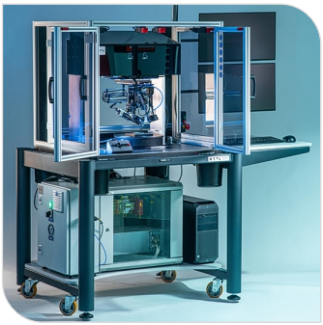
VIGO Photonics is a European leader in the production of epitaxial wafers and infrared detectors operating in the 1–20 µm range without the need for cryocooling. All products are developed and manufactured in-house using proprietary technology.

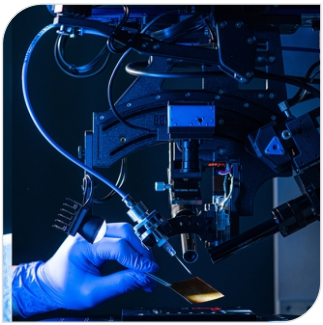
The company supports industries with real-time measurements of temperature, gas and liquid composition, and hazardous substance detection.

The EU-funded HyperPIC project will create Poland's first foundry for mid-infrared integrated photonic circuits.

COMPANY NAME:	XTPL
WEBSITE :	www.xtpl.com
BUSINESS PROFILE:	Microelectronics
FORM OF COOPERATION:	International trade and distribution
PRODUCTS / SERVICES:	Delta Printing System, Ultra Precise Dispensing System, Nonoparticles-based conductive materials: silver nanoinks and pastes, gold paste

shaping global nanofuture





XTPL is a provider of Ultra-Precise Dispensing technology and High Performance Materials for microelectronics. The company is developing and commercializing its globally innovative platform of ultra-precise printing of nanomaterials, protected by international patent applications. The UPD technology allows for the printing of conductive and insulating structures on a range of intricate substrates, thereby pushing the boundaries of what's possible. Our products: Delta Printing System for prototyping and low scale production, as well as our UPD system for industrial integration ensure scalability, cost effectiveness, and precision in the range of 0.50-10 micrometers. XTPL also offers a line of silver based conductive inks and pastes, both off-shelf products and tailor-made solutions.Primarily serving the OLED, MicroLED, flexible displays, sensors and semiconductor industries, XTPL contributes to the advancement of innovative technologies and advanced component manufacturing.

notes:

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