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CZECH REPUBLIC

Eleven years ago, the Ministry of Environment was established to prepare and implement policies to correct many of the mistakes of the past and to provide a healthier environment for Czech citizens. By 1995, **environmental protection policies** were adopted and implemented. These have brought tangible results, such as a large reduction in pollutant emissions, and improvements in air and water quality. These policies were largely based on the effective use of regulatory instruments, accompanied by incentives and sizeable investment. The Czech Republic also uses a system of environment impact assessment that applies to a broad range of projects. Emissions and discharges from polluting installations must now satisfy national standards, and a strong environmental inspection is in place to improve and enforce compliance with national laws. The quality of public information has also greatly improved: economic and environmental data are now easily accessible, environmental reports are published regularly, and international environmental norms and standards are increasingly being used.

In general, large **environmental investments** were approved in the mid-1990s and went ahead mostly in air-pollution abatement, water-pollution abatement and clean-up of contaminated soils. As a result, expenditures on environmental protection have risen

CORINEX

Corinex Global Corp's Canadian office, based in Vancouver, opened its European office in 1998 in Bratislava, capital of Slovakia, due to its strategic location in the region, easy access to other neighbouring markets and low costs. All sales and marketing activities in Europe are planned and co-ordinated from there. Corinex currently offers complete connectivity solutions based on wireless and power-line connections. The Vancouver office focusses on sales and manufacturing, while the Slovak office is responsible for software, R&D and support. Corinex Bratislava employs about 150 people in two facilities. In a consortium with Compaq, Corinex won a tender from Slovak Gas worth over C\$26 million for the supply of a CIS and the building of a call centre. Corinex will deliver CIS-system technologies to replace old technologies that do not meet EU criteria. Like many Canadian investors in the region, Corinex is considering expansion to the Czech Republic, Poland and Hungary, and is exploring other ventures in Austria, Germany and Russia. For more information, contact: <http://www.corinex.com>

IMAX THEATRES IN POLAND

IMAX, the wide-screen cinematographic film-projection system—an original Canadian idea still headquartered in Toronto—was started in the late 1960s after film experiments at Expo67 in Montreal. There are now over 200 IMAX theatres operating in 25 countries. The first Polish IMAX theatre opened at the Sadyba shopping centre in Warsaw in 2000, an operation that also involves Panasonic and the builder/owner of the facility, Israel-based IT International Theatres. Given this success, the developer opened a second IMAX theatre in Krakow in December 2001.

steadily, reaching 3% of GDP today. Most expenditures are financed by the private sector with some limited support from the state. A large part of the total went toward controlling air-pollution from power stations. The overall level of environmental expenditure is not likely to decrease in the future, given the new requirements related to EU legislation—the new environmental laws conforming to EU legislation are now in force.

However, in spite of recent improvements, there still exist continuing high emissions of carbon dioxide; a large portion of the population being exposed to extensive noise from transport; some larger cities and Prague wards being in the category of "slightly polluted air" according to the International Air Quality Index; almost 5,000 municipalities (with 100 to 10,000 people) not having plans for sewer and wastewater-treatment facilities; approximately one third of the total length of monitored water courses (especially smaller streams) remaining in the category of "highly" and "very highly" polluted water; 25.4% of the population still living in houses that are not connected to public sewers; and land-filling remaining as the most common means of waste disposal.

The following areas all offer **opportunities** for Canadian exporters and service firms: energy efficiency, disposal of hazardous waste, waste management, alternative energy sources reduction of carbon dioxide emissions and renewal of ecological systems.

Other Information Sources

Ministry of Environment: <http://www.env.cz>

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INFORMATION AND COMMUNICATION TECHNOLOGY

POLAND

The **information technology (IT) market** was worth US\$2.7 billion in 2000, constituting 1.7% of Poland's GDP. Its strongest segment was hardware (almost 43%), then services (over 36%) and software (almost 21%). Despite the general economic slowdown, the Polish IT market is still expected to grow, mainly due to the further development of the Internet and e-business, the necessity to update equipment, and the need to adjust the country's standards to the EU and the North Atlantic Treaty Organization (NATO). Polish companies constitute the majority of the large players on the market (the largest being Prokom, Tech Data, Optimus and Techmex), although foreign/international firms have been well-established here for many years (HP, IBM and Compaq having the strongest positions). Main IT customers include banking, finance and insurance sectors, transportation and communications, manufacturing industry, government and administration, and the retail sector.

The **telecommunications market**, which was worth about US\$8.38 billion in 2000, has the following structure: operators services (67%), installation and integration services (almost 14%), distribution/sales (almost 10%) and telecommunications equipment manufacturing (over 9%). The national telecommunications Telekomunikacja Polska S.A. is still the major player (almost 95% of the market), although several alternative operators continue to compete. The most successful are three cellular operators with 7.5 million subscribers at the end of 2000 (a dynamic growth of 83%). The number of mobile phones may reach the number of fixed lines within a year. With 10.8 million lines, Poland reached a density of 28 lines per 100 inhabitants by the end of 2000 (on average, 34 lines in the cities and 17 lines in rural areas). The telecommunications market will grow and further evolve as demonopolization and deregulation continue (monopoly on international calls will be lifted as of 2003), and a difficult international situation will result in takeovers/mergers and sometimes bankruptcies, changing the core group of players. Also, the worldwide trend of blurring the line between information and telecommunications industries will affect Poland.

Opportunities exist in Internet and intranet, e-commerce solutions, broadband, multimedia, education/entertainment, integration services, telecommunications operations, UMTS, new telecommunications value-added services and cable TV.

Major Competition

Canadian companies present in the market include Nortel Networks, Teleglobe, Mitel, Corel, Cognos, Hummingbird, Consultronics, EXFO, JDS Uniphase, Eicon, QNX and Vive Synergies, with others just penetrating the market (e.g. NSI, Harris and Positron). Most competition comes from Lucent Technologies, Siemens, Alcatel, Ericsson, Nokia, Motorola, France Telecom, Deutsche Telecom, British Telecom, TeleDanmark, Telia, AirTouch Communications, MediaOne Intl., DeTeMobil, UPC, Compaq, Vobis, Dell, HP, IBM, ICL, Oracle, Microsoft, Unisys, Intel, Cisco, SAP, Sun Microsystems, NCR, 3Com and NEC.

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HUNGARY

The size of the IT market was US\$1.3 billion in 2000, the highest per capita amount in Central Europe. It grew by 6.7% in 2000, and has a projected growth rate of 8.9% for 2001 and 10% to 11.5% for 2002-2004. Significant investment continues in the government, financial services and telecommunications sectors. The manufacturing of telecommunications devices, transmission-technology devices, consumer electronics, electronic parts and components is an important growth sector. Component parts for electronics and electrical machinery-production industries was one of the largest commodity groupings of Canadian exports in 1999. However, a large proportion of these products are imported into Hungary by multinational manufacturing companies for use in production of products for export to other markets. Therefore, direct sales to the market represent only a small part of the overall market. Both