

# THE AEROSPACE SECTOR

**Poland.** Business Forward







# Poland is an internationally acclaimed destination for:



## Pristine nature

A top 10 country to visit according to Lonely Planet



## A place where East meets West

Dynamic business hub at the heart of Europe



## Vibrant food scene

Warsaw among Top 10 Vegan-Friendly Cities in the World



## Great cities

Wrocław – most business friendly medium – sized European city (2022)  
Kraków – a TOP 25 Travellers' Choice 2022  
Łódź – in the „Best of the World 2022” List by National Geographic



## Attractive place for expats

Young, increasingly international society, with a very high level of English proficiency



## Rich history

Vast legacy of bravery and resilience





WHY  
POLAND



FACTS ABOUT  
THE POLISH  
AEROSPACE  
SECTOR



WHAT MAKES  
US DIFFERENT



DID YOU KNOW  
THAT



SUPPORT  
INSTITUTIONS



HOW WE CAN  
HELP YOU

## Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019

## Superb market share

Poland is the sixth largest economy in the European Union in terms of GDP

## Large, high-quality talent pool

300k+ of well-educated graduates annually

## Resilient economy

Poland is considered to be one of the most economically stable and fastest developing countries in the world.

## Transparent

Regional leader (2nd in CEE) in the Transparency International Corruption Perceptions Index

## FDI magnet

In 2022, Poland was ranked highest in the CEE region and eighth in Europe in terms of the number of inward foreign direct investments.

## Top-notch infrastructure

5th longest highway network in the EU  
Over 5,115 km total length of motorways and expressways

## Ratings remain high despite the turbulent times

Moody's: A2, S&P: A-, Fitch: A-, as of the second half of 2023

## Competitive, well-developed cities

European Cities of the Future 2023 (fDi Intelligence):

Warsaw – 6th position overall (ahead of Berlin and Stockholm)  
and 2nd in the business friendliness category among major cities;

The Silesia Region – European Entrepreneurial Region in 2021-2022,

among the top ten European regions in terms of attracting FDI and cost-effectiveness

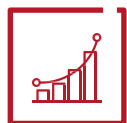


# FACTS ABOUT THE POLISH AEROSPACE SECTOR



## Strategic sector

Establishment of Polish Space Agency in 2014  
Membership in European Space Agency  
First commercial satellite launched in 2019



## Export value

The value of exports from Poland in the Aircraft, spacecraft, and parts thereof category in 2022 was more than €1.16 bn.



## Very strong aviation cluster

The Aviation Valley alone brings together 180 entities and employs more than 35,000 people.



## An expanding ecosystem

In Poland, more than 300 companies and research institutions operate in the space industry, employing 12 thousand workers.



## Specific specialization

Designing, producing and MRO of sports, agricultural and training planes, helicopters, gliders, aviation parts and accessories.



## Regulatory institutions in the aerospace area:

Civil Aviation Authority  
Polish Air Navigation Services Agency  
Polish Chamber of Unmanned Systems



Poland is one of the best countries for aviation manufacturing, with strong links between science and industry, 100 years of aviation history and 80 years of aircraft production.

### Sources:

Statistics Poland  
PAIH Database („Aircraft, spacecraft, and parts thereof” CN Code 88.)  
[www.dolinalotnicza.pl/en/about-us/](http://www.dolinalotnicza.pl/en/about-us/)  
Polish Space Agency (POLSA) Database  
[www.trademap.org](http://www.trademap.org)

# WHAT MAKES US DIFFERENT

## A network of four clusters – strong links between science and industry.

**Aviation Valley** – the cluster located in the capital of the Podkarpackie Voivodeship – Rzeszow is called the Heart of the Aviation Valley in Poland, with the largest concentration of aviation industry companies and pilot training centers in the country. In addition, there are scientific, research and educational facilities within the cluster. Currently, the Association consists of 180 entities from the region employing over 35 000 staff and concentrates 90% of total sector output in Poland.



**Wielkopolska Aerospace Cluster** – a cooperative of six aviation component manufacturing companies: Pratt & Whitney, "PZL Kalisz", Vac Aero, Meyer Tool, Hamilton Sundstrand and Teknequip Kalisz. The cluster cooperates with European Aviation Industry Centre. The employment of these companies reaches a total of nearly 2,500 people. The cluster plays a key role in the area of aerospace development, which has been included in the development policies of the country and the region.



**Lower Silesian Air Cluster** – established in 2015 with the support of the Legnica Special Economic Zone. The cluster works to create attractive conditions conducive to the development of aviation companies, while attracting new aviation industry investments in the south-western Poland.



**Silesian Aviation Cluster** – includes several dozen entities from the Bielsko-Biała area, including universities and business environment institutions. Utilizing EU funds, it works to improve the region's potential within the industry and increase the competitiveness of Polish aircraft enterprises.

Sources:  
[www.dolinalotnicza.pl/en](http://www.dolinalotnicza.pl/en)  
[www.wkl.org.pl/en](http://www.wkl.org.pl/en)  
[www.aerosilesia.eu](http://www.aerosilesia.eu)  
[lsse.eu/opal\\_portfolio/dolnoslaski-klaster-lotniczy/](http://lsse.eu/opal_portfolio/dolnoslaski-klaster-lotniczy/)

# DID YOU KNOW THAT



## Polish satellites in space

The Polish space industry is thriving and Polish companies have an appetite to conquer space. According to information provided by the Polish Space Agency, this year as many as four Polish companies and one university declare to launch their satellites. Polish companies are also cooperating on major international projects, receiving prestigious awards.



## Exploration of Jupiter

The European Space Agency's (ESA) flagship JUICE (Jupiter Icy Moon Explorer) mission – towards the moons of Jupiter – was launched on April 14 this year. Polish entities are also taking part in it.



## Local companies with global contracts

Polish companies are active in the international market. Currently, more than half of the 300 companies are actively participating in tenders of the European Space Agency, which affects their internationalization and strengthens the image of the Polish aerospace sector.



## Parts for F-16 made in Poland

In March 2023, PZL Mielec, one of Poland's longest-established aircraft manufacturing companies, announced the completion of the first two structures for the latest version of the F-16 fighter jet, Block 70/72. Such contracts make the Polish aerospace industry even stronger and relevant in the defense area of Central and Eastern Europe.

Sources:

[www.wnp.pl/tech/polskie-firmy-kosmiczne-w-koncu-beda-rywalizowac-z-najlepszymi,704079.html](http://www.wnp.pl/tech/polskie-firmy-kosmiczne-w-koncu-beda-rywalizowac-z-najlepszymi,704079.html)

[www.rynek-lotniczy.pl/wiadomosci/sektor-kosmiczny-czarnym-koniem-polskiej-innowacyjnosci-14675.html](http://www.rynek-lotniczy.pl/wiadomosci/sektor-kosmiczny-czarnym-koniem-polskiej-innowacyjnosci-14675.html)

[pzlmielec.pl/media/aktualnosci/art,253,pzl-mielec-wyprodukowal-i-dostarczyl-pierwsze-struktury-do-f-16-block-70.html](http://pzlmielec.pl/media/aktualnosci/art,253,pzl-mielec-wyprodukowal-i-dostarczyl-pierwsze-struktury-do-f-16-block-70.html)

# SUPPORT INSTITUTIONS

## The Polish Space Agency (POLSA)

Established in September 2014. The task of the Agency is to support the Polish space industry by combining the world of business and science. The Agency also helps in getting provision for entrepreneurs in obtaining funds from the European Space Agency (ESA). An important aspect of the Agency's activity is to promote the development of satellite technology that can be used in everyday life, including communication, navigation, environmental monitoring and weather forecasting.



## The Polish Air Navigation Services Agency

An agency that coordinates air traffic management tasks through airspace management (ASM), air traffic flow management (ATFM), and air traffic services (ATS) provision.



## The Łukasiewicz Research Network – Institute of Aviation

One of the most modern research facilities in Europe, with traditions dating back to 1926. The Institute closely cooperates with global tycoons of the aviation industry, such as: Boeing, GE, Airbus, Pratt & Whitney, and institutions from the space industry, including the European Space Agency. Strategic research areas of the Institute are aviation, space and unmanned technologies. It also provides research and services for domestic and foreign industries in the field of materials, composite, additive, remote sensing, energy and oil&gas technologies.



## The Space Research Centre of the Polish Academy of Sciences (CBK PAN)

The Space Research Center of the Polish Academy of Sciences (CBK PAN) is an interdisciplinary scientific institute that conducts scientific and technical work in space physics and physical and geodynamic studies of the planets and Earth.





# The Polish Investment and Trade Agency

The Polish Investment and Trade Agency's (PAIH) mission as a Government Agency is:

- To enable small- and medium-sized companies to reach their full potential in exporting their products and services around the world
- To support potential investors in Poland by providing comprehensive and up-to-date information services regarding legal and tax aspects, location and human capital, as well as on the available financial incentives
- To promote 'Poland as a Brand'

## How we can help

PAIH's experienced team of experts with a hands-on approach and excellent understanding of the needs of entrepreneurs will ensure that your projects will move as fast and smooth as possible.



**Information packs**  
macroeconomic, HR,  
legal, sectoral data



**Analysis  
of export  
potential**



**Preparing  
information  
packs**



**Verifying  
business  
partners**



**Organising  
business  
missions**



**Preparing lists  
of possible  
business partners**



**Organising  
B2B meetings**



**Support in contacts  
with Government  
Agencies**

# Contact us

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Social media:



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