The Polish Defense Industry - Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017

Description: This report is the result of extensive market and company research covering the Polish defense industry, and provides detailed analysis of both historic and forecast defense industry values including key growth stimulators, analysis of the leading companies in the industry, and key news.

Why was the report written?

The Polish defense Industry Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017 offers the reader an insight into the market opportunities and entry strategies adopted by foreign original equipment manufacturers (OEMs) to gain market share in the Polish defense industry.

What is the current market landscape and what is changing?

Poland's defense industry is the largest in Central Europe. During the forecast period, the country is expected to spend an estimated US$56.4 billion on strengthening its defense forces, primarily due to the modernization initiatives implemented by the Polish Ministry of Defense. Furthermore, the country's defense expenditure will be driven by a combination of factors such as tensions with Russia, strong economic growth, and increased involvement in NATO and peacekeeping missions. As a result of the restructuring, modernization, and financing plans of the Polish Armed Forces, the country's capital expenditure allocation of the total defense budget will increase over the forecast period.

What are the key drivers behind recent market changes?

Throughout the forecast period, Poland is expected to spend US$56.4 billion on its defense requirements. The main factors that will fuel the country's military expenditure include the country's modernization of existing defense equipment, threats from extremist organizations and organized crime groups, participation in peacekeeping missions, and a strained relationship with Russia. In addition, it is anticipated that Poland will register strong economic growth, which will enable the country to increase its defense expenditure.

What makes this report unique and essential to read?

The Polish defense Industry Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017 provides detailed analysis of the current industry size and growth expectations from 2013 to 2017, including highlights of key growth stimulators. It also benchmarks the industry against key global markets and provides a detailed understanding of emerging opportunities in specific areas.

Key Features and Benefits

The report provides detailed analysis of the current industry size and growth expectations from 2013 to 2017, including highlights of key growth stimulators, and also benchmarks the industry against key global markets and provides a detailed understanding of emerging opportunities in specific areas.

The report includes trend analysis of imports and exports, together with their implications and impact on the Polish defense industry.

The report covers five forces analysis to identify various power centers in the industry and how these are expected to develop in the future.

The report allows readers to identify possible ways to enter the market, together with detailed descriptions of how existing companies have entered the market, including key contracts, alliances, and strategic initiatives.

The report helps the reader to understand the competitive landscape of the defense industry in Poland. It provides an overview of key defense companies, both domestic and foreign, together with insights such as key alliances, strategic initiatives, and a brief financial analysis.
Key Market Issues

The current offset law requires foreign investors to direct the majority of their offset obligations into existing and largely unreformed local defense companies. A significant number of these companies are state-owned, with inefficient cost structures and Soviet-style management. Foreign OEMs often struggle to meet their offset obligations and, as such, are required to pay a penalty. All foreign contractors are contractually obliged to pay the penalty following the non- or under-performance of the offset policy which is specified at the time of offset agreement, regardless of whether the foreign firm was responsible for the failure or not.

In 2010, Polish defense imports registered a massive decline due to the effects of the global economic crisis, and imports in 2011 were 85% less than in 2007. Despite the country's defense imports in 2009 falling to almost one quarter of those in the previous year, imports are anticipated to increase over the forecast period. Imports will be fueled by the country allocating 20% of its budget to upgrade its military hardware.

The Polish Public Procurement Law faces the challenge of excessive interference from high-level government officials with the power to manipulate tenders to the disadvantage of foreign bidders. The acquisition process preceding the 2003 F-16 tender, worth US$3.5 billion, lacked transparency and faced the obstacle of corruption. Three foreign contractors entered the bid for this contact: Lockheed Martin with F-16C/D Block 52+, Saab/BAE Systems with JAS-39 Gripen, and Dassault with Mirage 2000-5 Mk II. The details of the offers made by Saab/BAE Systems and Dassault are not in the public domain, which indicates a lack of transparency and possible corruption in the bidding process.

Key Highlights

Poland's military expenditure valued US$9.1 billion in 2012, after recorded a CAGR of -2.41% during the review period, making it the largest in Central Europe. The country's defense expenditure is expected to record a CAGR of 7.2% during the forecast period, to reach a value of US$12.9 billion in 2017. The Polish defense industry is currently undergoing an infrastructure modernization phase, which will contribute to the country's high military expenditure over the forecast period. Poland's defense expenditure growth will also be driven by the country's strong economic growth, strained relationship with Russia and participation in peacekeeping missions.

Due to the global economic crisis, Polish defense imports reduced by 85% between 2007 and 2011. The US was Poland's main arms supplier over the review period, and the country relies entirely on the US for procuring its air defense systems. In addition to supporting international counterterrorism efforts, Poland partners closely with the United States on issues such as democratization, nonproliferation, human rights, regional cooperation in Central and Eastern Europe, economic growth and energy security, and United Nations reform. Therefore, the bilateral relation between these countries will provide business opportunity for exports during the forecast period.

With approximately 2.1 million unemployed citizens, which equates to 12.9% of the total civilian population in May 2011, organized crime in Poland is increasing. Polish crime groups are primarily engaged in human trafficking, cyber attacks, and the production and illegal distribution of drugs. Poland has emerged as one of the leading global producers of synthetic drugs, and an increase in the demand for recreational narcotics has resulted in a sharp increase in the smuggling of drugs and chemical substances from Russia through Belarus.
3.2. Analysis of Defense Budget Allocation
3.2.1. Capital expenditure allocation is expected to increase during the forecast period
3.2.2. The majority of the defense budget is allocated to military intelligence services and crisis response operations, which are anticipated to increase over the forecast period
3.2.3. Polish Land Forces defense expenditure will grow at a CAGR of XX% during the forecast period
3.2.4. Naval expenditure expected to grow at a CAGR of XX% over the forecast period
3.2.5. Poland will invest US$XX billion in air force modernization during the forecast period
3.2.6. The combination of army support, crisis response operations, and the command and control of armed forces will constitute the majority of Poland's defense budget
3.2.7. Polish defense budget directly correlates with the country's economic growth

3.3. Homeland Security Market Size and Forecast
3.3.1. Polish homeland security market will increase over the forecast period
3.3.2. Homeland security expenditure to be fueled by the country's efforts to counter organized crime
3.3.3. Poland faces no known threat from terrorist organizations

3.4. Benchmarking with Key Global Markets
3.4.1. Poland has the largest military expenditure in Central Europe
3.4.2. Poland faces no known threat from foreign terrorist organizations

3.5. Market Opportunities: Key Trends and Growth Stimulators
3.5.1. S 70i helicopter program will provide business opportunities
3.5.2. Missile defense systems are expected to register a surge in demand
3.5.3. Demand for communication systems is expected to increase
3.5.4. Modernization of naval defense forces will drive maritime equipment demand
3.5.5. Surveillance and detection system expenditure expected to increase

3.6. Key Procurements and Market Size

4 Defense Procurement Market Dynamics
4.1. Import Dynamics
4.1.1. Defense imports registered a decline during the period 2007-2011
4.1.2. Poland plans to diversify arms imports
4.1.3. Aircraft and missiles are the largest imported military hardware
4.2. Export Market Dynamics
4.2.1. Polish defense exports to be outpaced by established arms manufacturing companies
4.2.2. Poland exports the majority of its defense goods to Asia
4.2.3. Armored vehicles and aircraft constitute the majority of Polish defense exports

5 Industry Dynamics
5.1. Five Forces Analysis
5.1.1. Bargaining power of supplier: low
5.1.2. Bargaining power of buyer: high
5.1.3. Barrier to entry: medium
5.1.4. Intensity of rivalry: high
5.1.5. Threat of substitution: high

6 Market Entry Strategy
6.1. Market Regulation
6.1.1. Polish government encourages offsets in order to develop the country's defense industrial base
6.2. Market Entry Route
6.2.1. Joint ventures and acquisitions of domestic companies are the preferred entry routes
6.2.2. Foreign OEMs gain industry access through joint research and development programs
6.3. Key Challenges
6.3.1. Stringent offset policy discourages foreign OEMs from entering the industry
6.3.2. Lack of transparency in the public procurement process proves a major challenge

7 Competitive landscape and Strategic Insights
7.1. Competitive landscape Overview
7.2. Key Foreign Companies
7.2.1. BAE Systems: overview
7.2.2. BAE Systems: main products and services
7.2.3. BAE Systems: recent announcements and strategic initiatives
7.2.4. BAE Systems: alliances
7.2.5. BAE Systems: recent contract wins
7.2.6. The Boeing Company: overview
7.2.7. The Boeing Company: main products and services
8.2.22. Net foreign direct investment as % of GDP
8.2.23. International reserves, including gold
8.3. Energy and Utilities
8.3.1. Conventional Thermal Electricity Net Generation
8.3.2. Hydroelectricity Net Generation
8.3.3. Nuclear Electricity Net Generation
8.3.4. Conventional Thermal Electricity Installed Capacity
8.3.5. Electricity Exports (Billion Kilowatt hours)
8.3.6. Electricity Imports (Billion Kilowatt hours)
8.3.7. Proved Natural Gas Reserves
8.3.8. Petroleum Consumption
8.3.9. Polish Non Hydro Renewable Electricity Net Generation (Billion Kilowatts)
8.4. Infrastructure
8.4.1. Rail Lines
8.4.2. Air transport, freight
8.4.3. Overall Construction (US$ Million)
8.5. Minerals
8.5.1. Mining, Manufacturing, Utilities Output (USD Bn)
8.6. Technology
8.6.1. Research and development expenditure (Local Currency Thousands)
8.6.2. Patents Granted
8.7. Telecommunication
8.7.1. Telephone Lines
8.7.2. Telephone Lines Penetration Rate

9 Appendix
9.1. About Us
9.2. Disclaimer
Table 1: Polish Defense Expenditure, 2008-2012
Table 2: Polish Defense Expenditure, 2013-2017
Table 3: Polish Defense Budget Split Between Capital and Revenue Expenditure (%), 2008-2012
Table 4: Polish Defense Budget Split Between Capital and Revenue Expenditure (%), 2013-2017
Table 5: Polish Defense Expenditure Allocation (% Share), 2008-2012
Table 6: Polish Defense Expenditure Allocation (% Share), 2013-2017
Table 7: Polish Army Defense Budget Allocation (US$ Billion), 2008-2012
Table 8: Polish Army Defense Budget Allocation (US$ Billion), 2013-2017
Table 9: Polish Navy Defense Budget Allocation (US$ million), 2008-2012
Table 10: Polish Navy Defense Budget Allocation (US$ million), 2013-2017
Table 11: Polish Air Force Defense Budget Allocation (US$ million), 2008-2012
Table 12: Polish Air Force Defense Budget Allocation (US$ million), 2013-2017
Table 13: Polish Other Category Defense Budget Allocation (US$ Billion), 2008-2012
Table 14: Polish Other Category Defense Budget Allocation (US$ Billion), 2013-2017
Table 15: Polish GDP Growth vs. Defense Expenditure Growth and Defense Expenditure as Percentage of GDP, 2008-2012
Table 16: Polish GDP Growth vs. Defense Expenditure Growth and Defense Expenditure as Percentage of GDP, 2013-2017
Table 17: Benchmarking with Key Markets - 2008-2012 vs. 2013-2017
Table 18: Terrorism Index
Table 19: Polish Defense Offset Regulations
Table 20: Offset multiplier categories
Table 21: Market Entry Strategies by Key Foreign Companies
Table 22: Competitive Landscape of the Polish Defense Industry
Table 23: BAE Systems, Main Products and Services
Table 24: BAE Systems, Alliances
Table 25: BAE Systems - Recent Contract Wins
Table 26: The Boeing Company, Main Products and Services
Table 27: The Boeing Company, Alliances
Table 28: Lockheed Martin, Main Products and Services
Table 29: Lockheed Martin, Alliances
Table 30: Lockheed Martin, Recent Contract Wins
Table 31: Raytheon, Main Products and Services
Table 32: MBDA, Alliances
Table 33: Sikorsky Aircraft Corporation, Main Products and Services
Table 34: Sikorsky Aircraft Corporation, Alliances
Table 35: Sikorsky Aircraft Corporation: recent contract wins
Table 36: Bumar Group, Major Products and Services
Table 37: Bumar Group, Alliances
Table 38: Bumar Group, Recent Contract Wins
Table 39: PZL Mielec - Main Products and Services
Table 40: PZL Mielec, Alliances
Table 41: PZL Mielec, Recent Contract Wins
Table 42: Radwar, Main Products and Services
Table 43: Radwar, Alliances
Table 44: Wojskowe Zaklady Uzbrojenia SA, Main Products and Services
Table 45: Wojskowe Zaklady Uzbrojenia SA, Alliances
Table 46: Zaklady Mechaniczne Tarnów, Main Products and Services
Figure 1: Polish Defense Expenditure, 2008-2012
Figure 2: Polish Defense Expenditure, 2013-2017
Figure 3: Polish Defense Budget Split Between Capital and Revenue Expenditure (%), 2008-2012
Figure 4: Polish Defense Budget Split Between Capital and Revenue Expenditure (%), 2013-2017
Figure 5: Polish Defense Expenditure Allocation (% Share), 2008-2012
Figure 6: Polish Defense Expenditure Allocation (% Share), 2013-2017
Figure 7: Polish Army Defense Budget Allocation (US$ Billion), 2008-2012
Figure 8: Polish Army Defense Budget Allocation (US$ Billion), 2013-2017
Figure 9: Polish Navy Defense Budget Allocation (US$ million), 2008-2012
Figure 10: Polish Navy Defense Budget Allocation (US$ million), 2013-2017
Figure 11: Polish Air Force Defense Budget Allocation (US$ million), 2008-2012
Figure 12: Polish Air Force Defense Budget Allocation (US$ million), 2013-2017
Figure 13: Polish Other Category Defense Budget Allocation (US$ Billion), 2008-2012
Figure 14: Polish Other Category Defense Budget Allocation (US$ Billion), 2013-2017
Figure 15: Polish GDP Growth vs. Defense Expenditure Growth and Defense Expenditure as Percentage of GDP, 2008-2012
Figure 16: Polish GDP Growth vs. Defense Expenditure Growth and Defense Expenditure as Percentage of GDP, 2013-2017
Figure 17: SDI Terrorism Heat Map
Figure 18: Terrorism Index
Figure 19: Benchmarking with Key Markets - 2008-2012 vs. 2013-2017
Figure 20: Defense Expenditure of the World's Largest Military Spenders (US$ Billion), 2012 and 2017
Figure 21: Defense Expenditure as a Percentage of GDP of Largest Military Spenders (%), 2012
Figure 22: Poland's Air Defense Missile Systems Market Size (US$ Million), 2012-2022
Figure 23: Poland's Armored Personnel Carrier Market Size (US$ Million), 2012-2022
Figure 24: Poland's Main Battle Tank Market Size (US$ Million), 2012-2022
Figure 25: Poland's Infantry Fighting Vehicles Market Size (US$ Million), 2012-2022
Figure 26: Poland's Transport Helicopters Market Size (US$ Million), 2012-2022
Figure 27: Poland's Frigates Market Size (US$ Million), 2012-2022
Figure 28: Poland's Land Based C2C4ISR Market Size (US$ Million), 2012-2022
Figure 29: Polish Defense Imports (US$ Million), 2007-2011
Figure 30: Polish Defense Imports by Country (%), 2007-2011
Figure 31: Polish Defense Imports by Category (%), 2007-2011
Figure 32: Polish Defense Exports by Value (US$ Million), 2007-2011
Figure 33: Polish Defense Exports by Country (%), 2007-2011
Figure 34: Polish Defense Exports by Category (%), 2007-2011
Figure 35: Industry Dynamics: Porter's Five Forces Analysis
Figure 36: Polish Rural Population (In Millions), 2008-2017
Figure 37: Polish Urban Population (In Millions), 2008-2017
Figure 38: Polish GDP Per Capita, 2008-2017
Figure 39: Polish GDP, Current Prices (In US$ Billions), 2008-2017
Figure 40: PolishExports of goods and services, current prices (US$ Billion), 2001- 2010
Figure 41: Polish Exports of goods and services, current prices (US$ Billion), 2001- 2010
Figure 42: Polish Gross NationalDisposable Income (US$ Billion), 2002- 2011
Figure 43: Polish Manufacturing Output (US$ Billion), 2001-2010
Figure 44: Polish Consumer Price Index, 2008-2017
Figure 45: Polish Wholesale Price Index, 2002-2011
Figure 46: Local Currency Unit per US$ - Exchange Rate , 2008-2017
Figure 47: Local Currency Unit per Euro, 2008-2017
Figure 48: Polish Market Capitalization of Listed Companies (US$ Billion), 2002-2011
Figure 49: Polish Market Capitalization of Listed Companies (% of GDP), 2002-2011
Figure 50: Polish Government Cash Surplus/Deficit (LCU Billion), 2001-2010
Figure 51: Polish Government Cash Surplus/Deficit as % of GDP, 2001-2010
Figure 52: Poland's Goods Exports as % of GDP, 2002-2011
Figure 53: Poland's Goods Imports as % of GDP, 2002-2011
Figure 54: Poland's Goods Trade Surplus/Deficit as % of GDP, 2002-2011
Figure 55: Poland's Service Imports as % of GDP, 2002-2011
Figure 56: Poland's Service Exports as % of GDP, 2002-2011
Figure 57: Poland's Service Trade Surplus/Deficit as % of GDP, 2002-2011
Figure 58: Polish Foreign Direct Investment (US$ Billion), 2002-2011
Figure 59: Polish Net foreign direct investment as % of GDP, 2002-2011
Figure 60: Poland's International reserves, including gold (US$ Billion), 2002-2011
Figure 61: Polish Conventional Thermal Electricity Net Generation (Billion Kilowatt hours), 2001-2010
Figure 62: Polish Hydroelectricity Net Generation (Billion Kilowatt hours), 2001-2010
Figure 63: Polish Nuclear Electricity Net Generation (Billion Kilowatt hours), 2001-2010
Figure 64: Polish Conventional Thermal Electricity Installed Capacity (Million Kilowatt hours), 2001-2010
Figure 65: Polish Electricity Exports (Billion Kilowatt hours), 2001-2010
Figure 66: Polish Electricity Imports (Billion Kilowatt hours), 2001-2010
Figure 67: Poland's Proved Natural Gas Reserves (Trillion Cubic Feet), 2002-2011
Figure 68: Poland's Petroleum Consumption (Thousand Barrels Per Day), 2002-2011
Figure 69: Poland's Non-Hydro Renewable Electricity Net Generation (Billion Kilowatts), 2002-2011
Figure 70: Poland's Rail Lines (kms), 2001-2010
Figure 71: Poland's Air transport freight (million ton-km), 2001-2010
Figure 72: Poland's Overall Construction (US$ Million), 2007-2016
Figure 73: Poland's Mining, Manufacturing, Utilities Output (USD Billion), 2001-2010
Figure 74: Polish Research and development expenditure (Local Currency Thousands), 2001-2009
Figure 75: Polish Patents Granted, 2002-2011
Figure 76: Poland's Telephone Lines (In Million), 2001-2010
Figure 77: Poland's Telephone Lines Penetration Rate (Per 100 People), 2002-2011

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