



defence industry

labour market report.



randstad



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The Polish defence sector and its associated job market are currently at a turning point. A growing defence budget, numerous modernization programs for the Polish army, substantial public procurement, high-profile export contracts for Polish defence solutions, and an influx of the latest technologies have all contributed to the sector shifting into high gear since Russia's invasion of Ukraine – and with it, the job market linked to the "arms industry." According to the Industrial Development Agency, the Polish defence industry directly employed **over 50,000 people in 2023**. If we add subcontractors and related sectors to this number, we can speak of as many as **100,000 jobs**. This represents enormous human capital potential, encompassing a wide spectrum of professions – from engineers and technicians, through project managers, to production, logistics, and cybersecurity specialists.

In light of the changing geopolitical situation, **the demand for talent in the arms industry is expected to grow steadily**. Companies in this sector are already hiring extensively. However, they also face a number of challenges related to effectively acquiring talent with the appropriate technical, engineering, managerial, research and development, and administrative competencies. The specific nature of the sector, including issues of security, information protection, and advanced technology, further raises the bar for recruiters and employers.

Even though Polish technical universities annually supply the job market with well-educated talent, and industries related to the defence sector have a solid pool of experienced specialists, **companies need to skillfully compete for the best**. This report discusses what is worth knowing about the job market in the defence sector: the trends shaping it, human resources challenges, and effective strategies to support talent acquisition and retention.

We invite you to read on, hoping that the information presented will allow you to better understand the industry's dynamics, its key challenges, and the immense human capital potential that will determine the success of companies operating in this strategic sector of the national economy in the coming years. ■



the specifics of the defence market in poland.



The defence industry is a complex and heterogeneous segment of the Polish national economy. It's a sector that operates according to specific rules, often misunderstood by outside observers. The defence market is primarily shaped by the strategic defence needs of the state, which translates into [the dominant role of the public sector as the main procurer of defence products and services](#).

main purchasers in the polish defence market

The key institution responsible for the procurement process is the Armament Agency, which oversees the planning, execution, and control of the technical modernization of the Polish Armed Forces – especially in the context of complex combat systems.

Other military entities also play a significant role in the procurement structure of the Polish defence sector:

- [The Armed Forces Support Inspectorate](#), responsible for logistics and equipment operation.
- [Regional Logistics Bases](#) (RBL-OG).
- [Military Economic Units](#) (WOG).
- [and direct military units](#), which have autonomous budgets for purchasing equipment and supplies.

unique organisational challenges related to defence industry procurement

In this organizational environment, a particular challenge remains the alignment of the organizational and competency structures of defence industry enterprises with [the specifics of public procurement procedures](#). These procedures demand high compliance with military standards, appropriate certifications, and a long-term investment horizon. Developmental barriers also include ambiguous regulations, limited access to financing for projects with elevated technological risk, and difficulties in maintaining production continuity under conditions of cyclical orders. ■

the specifics of the defence market in poland.



major players in the polish defence market.

The Polish defence sector is a complex ecosystem, comprising entities with diverse ownership structures, specializations, and operational scales. The largest player in the domestic market remains [Polska Grupa Zbrojeniowa \(PGZ\)](#) – a state-owned holding company that brings together over 50 production, service, and research firms. These companies are closely involved in implementing key modernization programs for the Polish Armed Forces. Within PGZ, specialized companies like Huta Stalowa Wola, Mesko, Jelcz, OBRUM, and Military Armament Works (Wojskowe Zakłady Uzbrojenia) are responsible for the production, modernization, and operational support of various categories of weaponry.

Alongside these domestic leaders, [international defence concerns](#) such as BAE Systems, General Dynamics, Hanwha Defense, Hyundai Rotem, Kongsberg Defence, Lockheed Martin, MBDA, Northrop Grumman, Raytheon, and Saab also play a significant role. These companies are crucial to the market, supplying products and system components not available in Poland. Often, these are key elements of larger modernization projects, like missile systems, aircraft, or tanks. They participate in consortiums, technology transfers,

main suppliers of the defense market in Poland:

- Polska Grupa Zbrojeniowa (PGZ)
- international defense corporations
- private Polish companies
- civilian suppliers of technologies and components
- academic institutions and research & development units

and offset projects, thereby supporting the development of Poland's domestic industrial potential.

In recent years, the presence of [private Polish companies](#) offering services and products to the defence sector has also become increasingly noticeable. WB Group, specializing in electronics, communication, and command systems, is a good example, effectively collaborating with PGZ on defence projects. While smaller, private entities are highly flexible and capable of rapid adaptation, which is invaluable given quickly changing operational needs. ►

the specifics of the defence market in poland.



Civilian suppliers of technologies and components – manufacturers of electronic subassemblies, construction materials, software, and diagnostic systems – are also a vital link in this ecosystem. They feed into the value chains of large defence projects, and their role is growing with the increasing importance of integrating civilian technologies into military systems.

For complex defence projects, forming **industry consortiums** is a market standard, allowing for the pooling of organizational, technical, and financial resources. Partnership models include collaboration between state-owned

and private companies, as well as integration with foreign technological partners.

Academic centers and research and development units, particularly polytechnics and technical universities, are also important market participants. They develop prototypes, conduct technological analyses, and support innovation processes. Their role also extends to providing directional advice and independent verification of the technical parameters of defence systems, which is essential when executing projects involving public funds. ■

the specifics of the defence market in poland.



what are the segments of the defence sector's activity?

The activities of the defence industry span the entire lifecycle of weapon systems, from their initial concept to operational maintenance. A crucial role in this cycle is played by [research and development \(R&D\)](#), which forms the foundation for building technological superiority in modern battlefield conditions. New threats, such as electronic attacks or electronic warfare, as well as cybersecurity concerns, compel the sector to continuously seek resilience and an edge in next-generation technologies.

[Weaponry production](#) covers a broad spectrum of activities, ranging from manufacturing standard mechanical components to producing precise electronic modules, warheads, and advanced sensors. In many cases, production is carried out on demand, tailored to the requirements of a specific operational system.

Another significant segment of the defence industry's activity is [systems integration](#). This involves combining various technologies and components into a cohesive system capable of operating in a combat environment. Examples of such solutions include

integrated command posts, which merge communication, observation, and fire control functions.

[Certification](#) is also an inseparable element of the defence sector's operations. This mandatory process approves a given system or component for military use. It requires compliance with rigorous standards concerning quality, safety, and interoperability with other NATO systems.

Finally, the area covering [service and spare parts supply](#) ensures the technical readiness of military equipment. This includes ongoing repairs, post-warranty inspections, delivery of parts packages, and modernizations aimed at extending the technical lifespan of systems. ■



the specifics of the defence market in poland.



five main domains of the defence industry.



the land domain

encompasses a broad catalog of systems – from armored vehicles, through self-propelled artillery and rocket launchers, to engineering and technical support for ground forces. Examples include the new K2PL tank, Krab self-propelled howitzers, Rak mortars, and Borsuk infantry fighting vehicles.

in the naval domain, projects related to the construction of surface vessels – such as Kormoran-class minehunters and Miecznik-class multi-role frigates – play a significant role, as does the development of capabilities for countering underwater threats and coastal defence.

military aviation

focuses on multi-role helicopters, combat aircraft, and modern unmanned aerial systems (combat and reconnaissance drones), which are gaining increasing importance on the contemporary battlefield.

the weapons and ammunition area covers the production of individual soldier weaponry, caliber and special ammunition, combat agents, and explosives.

the C4ISR domain (Command, Control, Communications, Computers, Intelligence, Surveillance, Reconnaissance) deserves special attention, as it is responsible for integrating command, communication, and reconnaissance capabilities. In the era of digital transformation and the struggle for information dominance, C4ISR systems are becoming a crucial component of an effective battlefield – both nationally and within the NATO alliance.

the specifics of the defence market in poland.



benefits of defence programs.

In recent years, Poland has been **intensely modernizing its armed forces**, focusing on increasing defence capabilities in response to the changing geopolitical situation. The implementation of extensive defence programs not only strengthens the state's military potential but also significantly impacts the domestic labor market and industrial sector.

The vast majority of defence projects carried out in Poland include **an element of industrial cooperation or technology transfer**. This leads to the expansion of technical competencies and an increased demand for specialists in engineering, shipbuilding, and electronics industries. It also results in the creation of new jobs, particularly in regions with strong industrial backgrounds. Defence programs also trigger long-term investments in production and service infrastructure, and their implementation involves both large state-owned entities (such as PGZ, HSW, WZM, and Bumar) and numerous private companies acting as subcontractors. ■



the specifics of the defence market in poland.



key defence programs currently underway in poland.

"Wisła" program – medium-range air defence

This program aims to build an integrated medium-range air defence system based on American Patriot missile systems. It is one of Poland's most costly and technologically advanced defence projects. Its implementation involves Polish companies from the electronics, radar, and command systems sectors, developing domestic capabilities in defence system integration. [The first phase of the program is currently underway and is set to conclude by December 2026.](#) The entire project is planned to be completed by approximately 2030.

"Narew" program – short-range air defence

Its goal is to complement the "Wisła" system with mobile short-range missile systems. British CAMM missiles, produced by the MBDA defence concern, have been purchased, with a targeted integration with Polish radars and command systems. The production of many components takes place in Poland, supporting local factories and increasing demand for engineers and air defence system specialists. [The program is currently in the implementation and integration phase, with completion expected in 2027–2028.](#)

"Abrams" program – new-generation tanks

The purchase of M1 Abrams tanks is a response to the need for increased mobility and firepower for ground forces. Although the first units come from the USA, a training and logistics center is being established in Poland, creating jobs in service, training, and warehousing areas, including in Żurawica and Biedrusk. [Tank deliveries are ongoing, and full operational readiness of the units and completion of support infrastructure construction are anticipated by the end of 2026.](#)

"K2PL" program – tanks produced in poland

This program involves introducing a new type of tank for the army of the Republic of Poland. Developed jointly with the South Korean company Hyundai Rotem, it envisages launching the production of modern K2 tanks in Poland. This is crucial for revitalizing the armored industry and for developing advanced technological competencies in combat vehicle design. The preparation phase for production launch is currently underway, [with the first K2PL tanks expected to be ready in 2027, and the program's completion planned for after 2030.](#)

"Borsuk" program – new infantry fighting vehicle

Developed by a consortium led by Huta Stalowa Wola, the Borsuk is a modern, tracked infantry fighting vehicle designed to replace the BWP-1. Its production will contribute to increased employment in Stalowa Wola and among numerous subcontractors, as well as to the development of modern unmanned turret technologies and armor systems. The program has successfully passed qualification tests and is entering the production phase. [The first deliveries are planned for 2025–2026, with full order fulfillment by the end of the decade.](#)

"Miecznik" program – missile frigates for the navy

The construction of three missile frigates at PGZ Naval Shipyard in Gdynia is a key impulse for the reconstruction of the shipbuilding industry. The project requires advanced competencies in hull construction, armament integration, and electronic systems, which translates into increased employment and the development of the local labor market in Pomerania. The construction of the first unit is currently underway. [All three frigates are planned to be delivered by 2031.](#)

"Homar" program – long-range rocket artillery

This program includes the purchase of HIMARS systems and the development of the "Homar-K" version in cooperation with Hanwha Defense from South Korea. This opens up opportunities for the production of rockets, launchers, and electronic components in Poland. The project generates jobs in defence industry plants, as well as in the logistics and ICT sectors. [Deliveries of the first HIMARS systems have already begun, while full integration of "Homar-K" is expected in 2027–2029.](#)

"Orka" program – submarines

This program involves the acquisition of new-generation submarines equipped with cruise missiles. Although it is currently in the technical dialogue stage, its implementation could create new development opportunities for shipyards and armament system suppliers, and attract foreign investments related to technology transfer. [The progress of work is low – the program remains in the analytical and conceptual phase, with its practical commencement expected after 2026, and completion no earlier than after 2032.](#)

"Gladius" program – unmanned strike systems

Developed by PGZ and WB Electronics, this program concerns reconnaissance and strike drones. It aligns with the global trend of autonomization in military operations. It creates space for the development of innovative competencies in electronics, AI, communication, and precision manufacturing, opening up the job market for engineers, programmers, and unmanned system operators. The program is in an advanced prototype development phase. [The first operational deployments are planned for 2025–2026, with further capability expansion until 2028.](#)

trends, challenges, and development prospects of the polish defence market.



Over the past few years, Poland has transformed from a country with moderate military spending into one of Europe's most dynamically investing nations in defence. This isn't an evolution; it's a drastic acceleration, driven by events to the east, escalating geopolitical tensions, and growing public awareness of threats. Back in 2015, Poland's defence budget was less than 40 billion PLN. By 2023, it had surpassed 100 billion, and in 2024, it exceeded 158 billion PLN. This represents over 4% of Poland's GDP and is the highest proportion among all NATO countries relative to the size of their economy.

policy and time pressure: balancing speed with long-term strategy.

Given dynamic geopolitical changes, Poland is making rapid decisions regarding military equipment purchases. These actions aim to immediately strengthen the country's defence capabilities. However, this fast pace of decision-making can lead to challenges related to integrating new systems with existing infrastructure and ensuring adequate logistical and training support. Another challenge facing Polish defence today concerns the rapid development of military technologies and the evolution of combat tactics. Both phenomena demand a flexible and responsive approach to modernizing

The scale of Poland's defence investments is impressive, but it also raises many questions: How long can this pace be sustained? Can the state effectively manage such a massive flow of funds? And ultimately, what does this mean for the domestic industry and labor market? How can a value chain be built within the defence industry to avoid overinvestment and maintain production flexibility amidst dynamic geopolitical changes?



michał wereszko
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the armed forces, as existing weapon systems and organizational structures can quickly lose their effectiveness. Therefore, it's essential to develop a modernization strategy that can adapt to new threats and technological opportunities. ►

trends, challenges, and development prospects of the polish defence market.



Close cooperation between the armed forces, the scientific research sector, and the defence industry is crucial to ensure that investments meet current and future battlefield requirements. ■

people want security, and to know where their money goes.

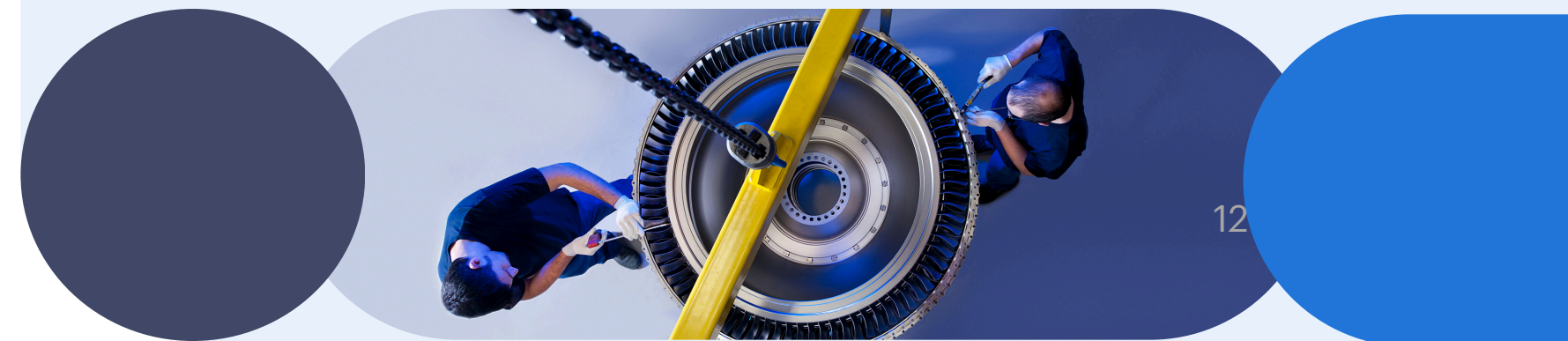
Today, Poles, regardless of their political views, accept high defence spending. At the same time, however, they are increasingly asking: "What exactly are we buying?", "Will it be produced in Poland?", "How many jobs will this create?". This is a new quality in public debate. The "arms industry" is thus no longer solely the domain of the Ministry of Defence – **it is becoming a real part of the economy, regional policy, and the labour market.**

In cities like Stalowa Wola, Gliwice, or Gdynia, military investments drive entire ecosystems: from production plants and engineering firms to technical universities and local vocational schools. It's becoming increasingly clear that the defence industry can become a driver of development for many regions – provided it is well-coordinated. ■

public sentiment in poland regarding defence spending:

- **50.6%** of Poles support increasing defence expenditures, even at the cost of social programs such as welfare benefits or healthcare.
- **42.8%** of respondents declared their readiness to contribute their own financial resources to the country's defence.
- **73.5%** of Poles support investments in civil security, such as building shelters or accumulating reserves, even if it means price increases for certain goods and services.

source: [IBRiS survey](#) conducted on April 11–13, 2025, for PAP.



trends, challenges, and development prospects of the polish defence market.



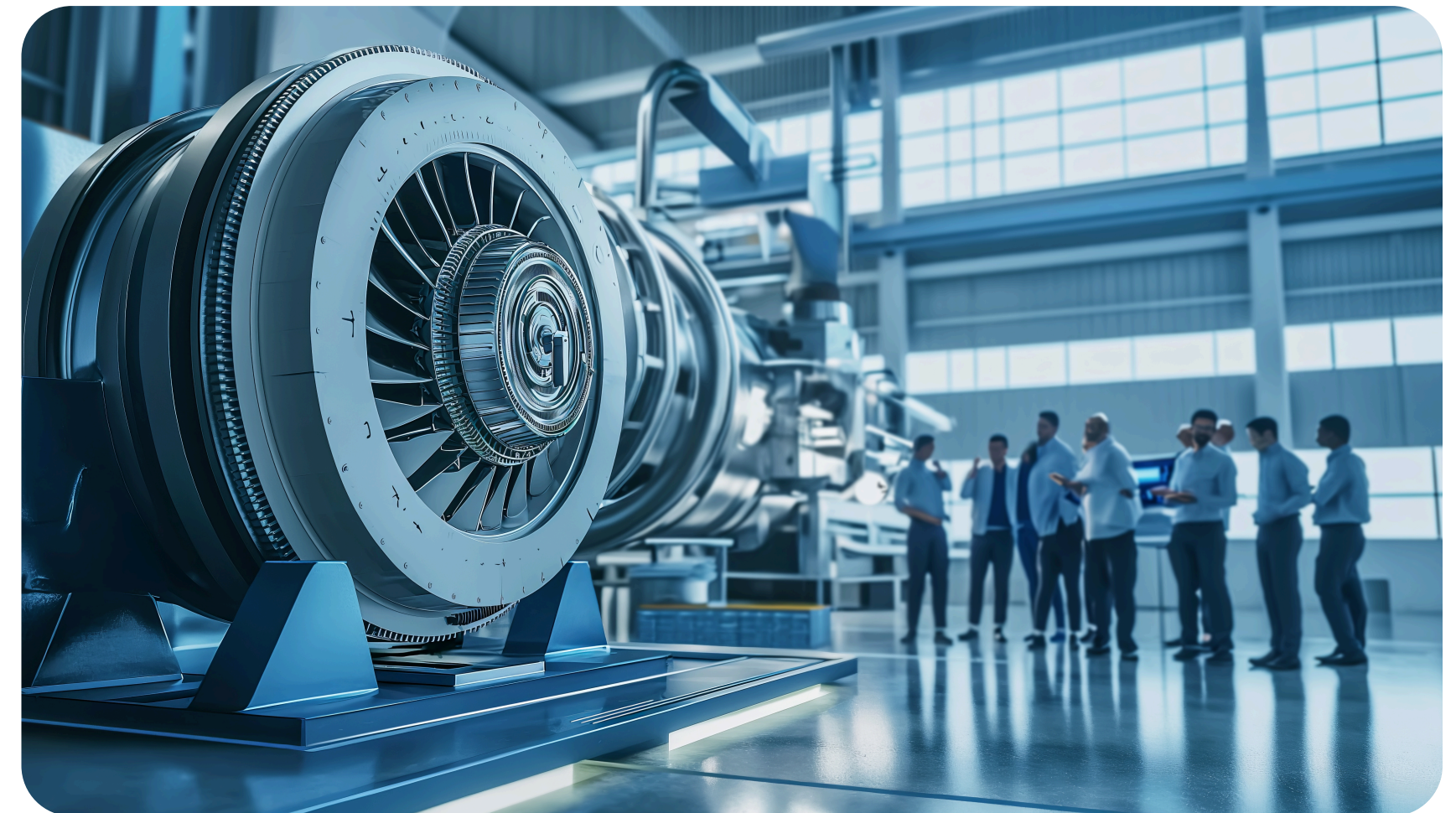
a new role for domestic industry: time for technology transfer and export.

For many years, Poland was primarily a recipient of foreign military equipment. Now, there's growing discussion about the polonization of technology and building our own competencies in this area, not just in assembly, but also in design and export.

Let's remember that entirely new areas of military technology are also developing today, such as unmanned combat systems, precision electronics, and dual-use technologies. For Polish companies – both large ones like PGZ and private high-tech firms – this is a huge opportunity, but also an organizational and staffing challenge.

Defence investments, supported by the increasing involvement of Polish technical expertise in creating weapon systems, directly translate into industrial development at both national and regional levels. As a result, **new production facilities** are emerging in Poland, the demand for **highly skilled personnel** is growing, and local industrial and research ecosystems are gaining **new impulses for innovation**. The defence industry is thus becoming one of the driving forces behind technological and economic transformation in many regions of our country.

If the current pace of development is maintained, **Poland is poised to become one of the most important defence markets in the region by 2035** – with a strong production base, a developed labor market, and significant export opportunities. ■

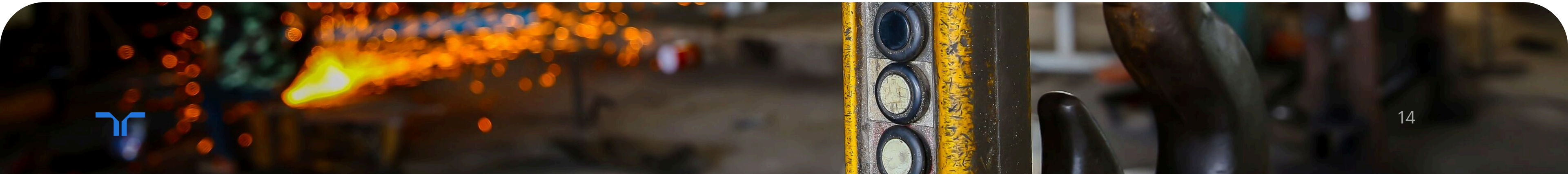


trends, challenges, and development prospects of the polish defence market.



examples of current investments in the polish defence sector.

company	type of investment	location	expected completion date
PGZ Huta Stalowa Wola	production of 48 M903 launchers for the Patriot system	Stalowa Wola	until 2026
Wojskowe Zakłady Łączności nr 1	construction of 2 production halls, modernization of the galvanizing plant, welding shop, and warehouse	Zegrze	Q4 2027
Zakłady Metalowe Dezamet	construction of new production and warehousing facilities, purchase of machinery and equipment, development of 155 mm projectile production	Nowa Dęba	until 2026
PGZ Stocznia Wojenna	construction of an assembly hall (6,000 m², 43 m high) for the Miecznik frigate program	Gdynia	until 2026
PIT-Radwar	construction of a Hardware-In-The-Loop (HWIL) laboratory for missile system simulations	Warszawa, Zielonka	completed in 2024
Mesko S.A.	construction of new production halls for rockets and ammunition as part of "Project 400", increasing the production capacity of 155 mm projectile bodies	Skarżysko-Kamienna, Pionki	until 2027
Huta Stalowa Wola	expansion of production capabilities for the Regina (Krab) and Borsuk programs	Stalowa Wola	until 2026
Fabryka Broni „Łucznik” – Radom	expansion of production capacity for MSBS Grot carbines and VIS 100 pistols	Radom	until the end of 2026
PGZ Stocznia Wojenna	construction of two halls, a social and administrative building, and the expansion of the wharf and storage yard	Gdynia	until 2026
Zakłady Chemiczne „Nitro-Chem” SA	new technological lines for ammunition loading	Bydgoszcz	no data
Zakłady Produkcji Specjalnej „Gamrat”	construction of an installation for the production of gas generators	Jasło	no data



trends, challenges, and development prospects of the polish defence market.



multi-domain production: key to advanced defence solutions.

Modern defence programs demand close cooperation and the integration of technologies across many different production domains. This is no surprise, as a single weapon system often combines mechanical, electronic, IT, and material elements. This requires advanced collaboration between companies from various industries, or the development of competencies within a single group or organization. This approach leads to comprehensive, integrated solutions that enhance a country's defence capabilities, while simultaneously presenting considerable logistical and technological challenges.

In practice, this means that the domestic defence industry **must possess competencies in all these areas**. Production itself becomes more complex, requiring constant access to modern technologies and specialized personnel.

This presents **an opportunity for Polish companies** to become key suppliers, not only of finished defence products but also of components and specialized systems used in armaments. At the same time, however, given economic conditions and the pace at which advanced technologies can be developed, there remains **significant scope**

for foreign capital in the Polish defence market. Within the ongoing modernization programs, foreign investors can supply crucial components and technological solutions that would be too time-consuming, costly, or resource-intensive to develop domestically. This type of cooperation aligns with the global trend in defence industry development, based on international integration and leveraging the potential of allied nations within joint technological and industrial ventures. ■



trends, challenges, and development prospects of the polish defence market.



innovative funding sources drive defence industry development.

Implementing large defence programs and deploying modern defence technologies demands significant financial outlays from the state. Every stage of such an investment – from design and research, through building production facilities, to equipment procurement and modernization – requires ensuring adequate funds.

Today, the production and implementation of defence systems cannot succeed without the simultaneous involvement of multiple entities. It's a complex, multi-faceted network woven from the effective cooperation of state institutions, public and private companies, research institutions, and foreign partners. It's important to understand that the success of such collaboration lies not only in the synergy of competencies, technologies, and know-how, but above all, in a smooth and agile response to emerging challenges, of which there are many in today's reality.

michał wereszko
senior engineering consultant



Given growing security needs, Poland is therefore seeking new funding sources for its defence industry. The most important ones currently are:

offset

One crucial tool for financing large defence projects is offset, which involves special obligations from foreign military equipment suppliers to Poland.

According to the offset law, when Poland purchases modern military equipment abroad, foreign suppliers are obliged to invest in Poland. This can be through technology transfer or production, training for Polish employees, or investments in production plants, research, and development.

Thanks to offset, a portion of the money spent abroad, in a sense, returns to Poland in the form of investments, jobs, know-how, and increased capabilities for the domestic industry. [Some of the largest such commitments were the offset agreements signed in 2024 between the State Treasury and Boeing and General Electric, related to the purchase of AH-64E Apache helicopters.](#) ►

trends, challenges, and development prospects of the polish defence market.



loans and credits for equipment purchases

Polish defence programs are also financed through loans and credits, both domestic and foreign. Using such instruments allows the financial burden to be spread over a longer period, while enabling the rapid finalization of modern defence system acquisitions.

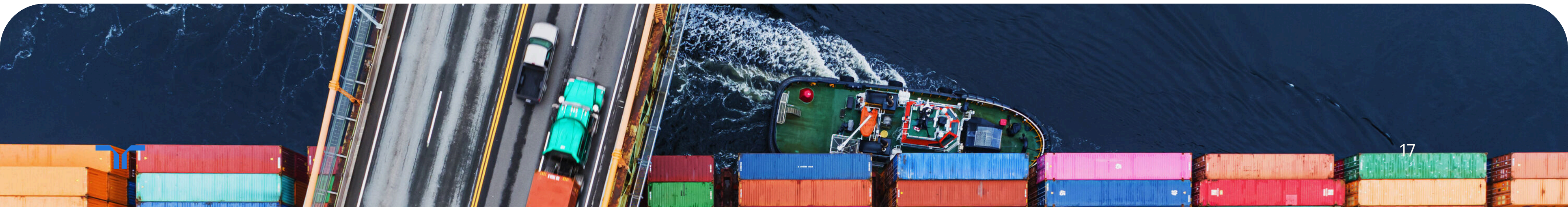
access to EU funding sources

As a member of the European Union, Poland also has access to special financing mechanisms that allow for covering the costs of defence investments through loans from the European Investment Bank (EIB) and funds from other EU institutions. This is particularly important in the context of implementing large defence projects that require substantial financial outlays. [One EU initiative that will provide defence funding in Poland and other European countries in the coming years is the SAFE defence loan program, which envisages €150 billion in loans.](#) ■



małgorzata mudyna
regional director

By leveraging various forms of project financing, the Polish defence sector can effectively pursue ambitious investments and avoid financial constraints. This is especially crucial given the rapidly evolving geopolitical landscape we've witnessed in recent years. A flexible approach to funding sources allows for agile responses to changing market needs and quicker implementation of modern defence technologies.



labour market and the defence industry.



how recruitment practices and employment policy have evolved in the defence industry:

For many years, the job market in the defence industry resembled a closed ecosystem, built on [the long-term development of internal competencies and stable employment](#). One of the main reasons for this situation was limited funding and a lack of dynamic growth in orders. As a result, the sector was characterized by relatively low turnover.

Companies and institutions connected with the sector [invested in developing the knowledge and experience of their scientific and technological employees](#), often collaborating with technical universities, research institutes, and the academic community.

For many years, another important source of new competencies in the defence sector was [the reconversion of military personnel](#). This involved employing former professional soldiers who, after concluding their service, continued their careers in the defence industry – often in technical, analytical, or project management areas.

[Recruitment based on referrals and passive candidate sourcing](#) was also quite common, which worked well in a stable and predictable

environment. The high level of specialization, long project cycles, and relatively small teams fostered slow, organic growth of human resources structures. ■





... and what is the competency and recruitment status of the defence sector now?

The situation has changed significantly in the last two to three years. Due to the substantial [increase in funding](#) for the defence sector and [the intensification of public and international orders](#), the industry has entered a phase of dynamic growth, resulting in a rising demand for employees today.

With the increasing complexity and technological advancement of defence systems, there is a particularly [growing demand for highly qualified technical experts](#). Their involvement is necessary not only during the implementation of modern solutions but, above all, in their design, development, and integration processes. Staff shortages could significantly limit further technological progress and the competitiveness of the Polish defence industry.

Consequently, companies have begun to recognize the necessity of [modernizing their existing recruitment practices](#), scaling HR teams, and utilizing the support of external recruitment partners – we see this especially in situations requiring a rapid increase in employment, the acquisition of niche competencies, or conducting recruitment discreetly, without disclosing the employer's identity in the initial stage of the process. ■

PGZ significantly increases employment

Polska Grupa Zbrojeniowa (PGZ) currently [employs over 20,500 people across its 68 companies \(1\)](#). [PGZ is actively recruiting for nearly 200 positions. \(2\)](#)

For instance, PZL Mielec, a manufacturer of Black Hawk helicopters among other products, hired over 300 individuals in 2024. They plan to recruit another 100 employees in 2025. [\(3\)](#)

Other companies within the PGZ group are also actively seeking skilled personnel. These include: Huta Stalowa Wola, which supplies the armed forces with combat vehicles and artillery equipment, Zakłady Mechaniczne "Tarnów" S.A., a producer of modern sniper rifles and Stocznia Wojenna, responsible for designing and building vessels for the Polish Navy.





skills most commonly sought by employers in the defence sector.

Organizations in the defence sector are currently seeking employees with **highly diverse skill sets, depending on their business profile and the nature of the solutions they offer.** While specific needs may vary across different market segments, we are observing a recruitment demand **cycle typical for industries in a growth phase.**



phase 3
a clear increase in demand for technology specialists with expertise in unique defence industry domains.

Candidates must specialize in areas such as material engineering, precision mechanics, applied electronics, aerospace construction, and weapon system design.

phase 1
intensive recruitment of sales specialists and institutional client relationship advisors.

The demand is for experts who can navigate complex state administration structures, understand public procurement procedures, and have experience selling solutions that require high technological and formal engagement.

phase 2
building operational and strategic backbones by hiring project leaders and business managers.

Organizations are recruiting professionals capable of leading complex ventures and coordinating interdisciplinary teams.

phase 4
parallel search for production specialists.

This includes both experienced employees responsible for launching and optimizing production lines, and process engineers who support the implementation of new technologies. The growing demand also extends to areas related to quality assurance, maintaining production continuity, and overseeing compliance with stringent legal and industry standards.

phase 5
in the longer term, an expected increase in jobs for high-tech solution developers.

Due to the continued development of national military technical modernization programs, the demand for professionals involved in creating and testing modern electronic systems, optoelectronics, and control systems will be particularly high.



what kind of employees does the defence sector need today?

The growth of Poland's defence industry has led to a dynamic increase in demand for **specialists, particularly in technical and engineering fields, in recent years.**

Primarily, the sector is looking for:

- production workers
- research and development (R&D) engineers
- programmers
- electronics specialists

The expertise of these specialists is fundamental for executing projects involving modern weapon systems and military technologies.

Project-oriented positions are **also gaining significance**, including:

- project managers
- analysts

These specialists are responsible for planning, supervision, and integration of work within complex technical projects.

Additionally, to support the work of technical and project specialists and to foster the business development of defence organizations, **experts are also sought in other areas such as:**

- finance
- logistics
- HR
- industrial marketing

This means the development of the defence sector impacts more than just the job market for technical employees; it also significantly influences the entire associated economic ecosystem.

labour market and the defence industry.



how do jobs and recruitment in the defence sector differ from the civilian sector?

While the defence industry is an exceptionally diverse environment in terms of skills, we observe certain recurring patterns that distinguish this sector from civilian industries. This applies to both expectations of candidates and the working conditions of project teams.

sales and commercial positions

This is one area that differs significantly from what we know in the civilian sector. Classic sales competencies – focusing on quickly closing deals, price flexibility, or the ability to work with a large number of clients – give way to entirely different requirements here.

The sales process in the defence sector is long-term and **based on multi-stage negotiations** that often last many months, or even years. **A deep understanding of the technical specifics of the solutions offered**, their integration with existing weapon systems, and compliance with formal requirements set by state institutions are also highly important.

technology roles

Technology roles in the defence industry also differ significantly from their civilian counterparts. This is primarily due to **the need for full control over the manufacturing process** and the desire **to maximize the security of key production competencies within the country**.

what competencies are required from candidates for sales positions in the defence sector?



interpersonal skills related to **building long-term, professional relationships** come to the forefront – both with decision-makers from contracting entities (often public administration structures) and with technological partners.



individuals holding sales positions in this industry **must be able to navigate a highly formalized, regulated environment** where purchasing decisions are closely tied to armed forces modernization schedules, budget availability, and the strategic priorities of the state.



flexibility in relationship management, the ability to operate within **a complex web of dependencies**, and an understanding of technological policy are highly valued. The defence industry operates in a unique model of competitive cooperation. It is not uncommon for the same companies to simultaneously compete, collaborate, or act as client and supplier to each other.

Consequently, many advanced technology solutions are developed within a tightly supervised, closed manufacturing chain, entirely executed by a single entity or a strictly controlled consortium. ►

labour market and the defence industry.



For many technology employees, this work model can be exceptionally satisfying. It allows them to see a product through from concept to implementation and actively participate in its improvement and modification. This environment is **ideal for individuals who value substantive, long-term work** and want to contribute to processes that have real significance for national security and defence.

paweł kopeć

national sales & key account manager, manufacturing



Recruiting for the defence sector – especially for senior specialist and management positions – presents a significant challenge for HR departments. Recruiters aren't just tasked with finding individuals who possess the right technical education and experience; they also need to identify candidates who can operate effectively within an environment characterized by numerous formal constraints, political dependencies, and strict confidentiality requirements.

what competencies are required from candidates for technology roles in the defence sector?



high level of technical knowledge is primarily expected from engineers and programmers.



great flexibility is also enormously important—both in terms of assigned tasks and readiness to work in interdisciplinary project teams.



the sector often requires candidates to be able **to work under time pressure and adhere to rigorous information security standards**.

In summary, all candidates considering a career in the defence industry **should demonstrate significant openness to the specific conditions of this sector**, including different process standards, unique legal requirements, and an organizational culture shaped by its ties to the military and state security. This is precisely why flexibility, readiness to work in a highly formalized environment, and adaptability to complex procedures are major assets that increase one's chances of successfully finding a place in this industry. ■

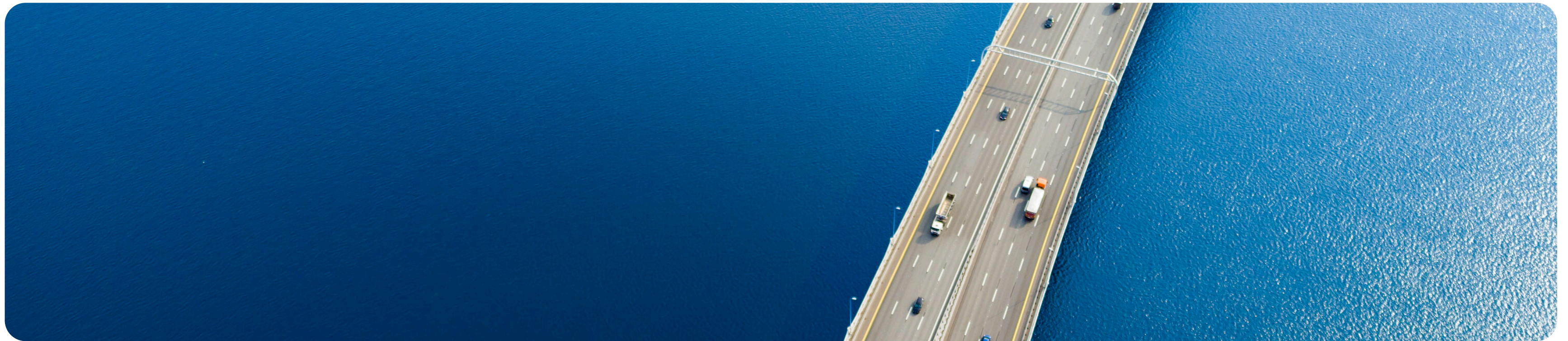
what does the future hold? forecasts for the european and polish labour markets in the defence industry.



the current state of the labour market in europe's defence industry.

The European defence sector is currently undergoing a significant transformation and dynamic growth, primarily driven by increasing defence spending. In 2024, European countries' defence expenditures reached **€290.4 billion**, marking a 10.1% increase compared to the previous year. This trend is also supported by EU funds, including a substantial increase in the budget of the European Defence Fund (EDF). In 2025, the EDF is projected to allocate approximately **€15 million** for digital transformation, an almost 80% rise from 2024. All these factors are profoundly impacting the labour market within the defence industry.

The defence sector **directly supports 1.027 million jobs** across Europe. When considering indirect and induced employment, it creates a total labour ecosystem **for 4.9 million people**. The industry's attractiveness is further enhanced by an average annual salary in Europe of €59,000, which is 43% higher than the EU average across all sectors. ■



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skills challenges in the european defence industry.

Despite robust growth and strategic importance, the European defence industry faces significant labour market challenges. Its primary issues revolve around **talent shortages** and **significant skills gaps**, especially in areas related to key technologies.

shortage of engineering professionals

It's projected that by 2030, the labour market could be short of 100,000 to 150,000 engineers. These shortages are felt across many countries, including Germany, France, Poland, and the United Kingdom, where there's a lack of specialists in fields such as software, autonomous systems, radar, and composite materials. At the same time, the defence industry currently has a massive demand for engineering professionals with digital skills, specializing in areas like data engineering, AI/ML, avionics, and cybersecurity.

Individuals with competencies related to 3D design (CAD, SOLIDWORKS) are also highly sought after.

shortage of manual workers

Additionally, the industry is grappling with a severe lack of qualified manual workers (often referred to as "blue and grey collar workers"). This primarily includes mechanics, CNC machine operators, skilled welders, and assembly technicians. ■



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what are the sources of difficulty in attracting and retaining employees in the defence industry?

an aging workforce

This is one of the main factors hindering the closing of the skills gap in the defence industry. A significant portion of the European defence workforce is approaching retirement age, which is particularly evident in positions requiring physical skills, such as welders or CNC mechanics. Approximately 25% of engineers and research and development (R&D) employees in Europe have already reached or are close to retirement age.

negative perception of the industry

This attitude is particularly noticeable among younger generations. Research indicates that one-third of young Europeans employed in the defence sector are considering changing jobs within the next six months.

competition for talent

The defence industry competes for talent – especially in digital technology areas – with other sectors that are often perceived as more attractive (such as IT or the automotive industry – a sector that ranked first in attractiveness according to Polish employees in the [Randstad Employer Brand Research 2025](#)). It is estimated that approximately 7.9% of engineers transfer

to related sectors. They are tempted by factors such as salaries, which in the IT and FinTech/IT sectors often exceed those offered in the defence sector, further complicating the acquisition of specialists. ►



paweł kopeć

national sales & key account manager, manufacturing

The challenge for the defence industry is not only acquiring highly qualified employees but also adapting to the changing expectations of talent. According to [the Randstad Workmonitor 2025 report](#), talents (especially those from younger generations) are increasingly linking career decisions with their own values, ambitions, and life situation. For companies in the defence sector, this means the necessity of thoughtfully building an employer brand, ensuring transparent communication, and increasing flexibility in organizational culture and recruitment processes. Without this, it will be difficult to acquire and retain talents who may have a negative view of the sector or currently don't see opportunities within it to achieve their individual professional and personal goals.

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skills mismatch

It's important to remember that the defence industry also grapples with significant technical skills gaps. These are further exacerbated by challenges related to discrepancies between the skill sets available in the labour market and those sought by employers (known as mixed skill mismatches). This requires creating a strategic balance between internal training programs and external recruitment.

high requirements for security clearances

Defence companies primarily hire individuals who already possess active security clearances, or candidates who commit to obtaining them after starting work. However, the procedure itself poses a significant barrier: it requires detailed disclosure to counterintelligence services of information regarding one's private life, financial situation, social activities, and foreign contacts. For many specialists, such deep intrusion into their personal sphere is discouraging, which significantly narrows the pool of potential candidates and complicates the acquisition of qualified employees in the defence sector. ▶

sector attractiveness in poland.



source: randstad employer brand research 2025 – poland

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difficulties in retaining talent

European turnover rates in organizations are high - higher than in the USA. The factors that most strongly influence employees' decisions to leave their jobs primarily include compensation, career development opportunities, work-life balance, and organizational culture. In Poland, similar to other European countries, the most common reasons for leaving a job, besides salary, are job stability, limited career paths, and a lack of work-life balance.

Data from the latest [Randstad Employer Brand Research](#) clearly demonstrates this trend. ■

top 3 most frequent reasons for leaving a job.



low
salary

Too low salary in relation to the rising cost of living is the most frequent motivation for changing jobs. This reason was indicated by 53% of all respondents, most often by individuals between 35 and 54 years of age.



lack of company's
financial stability

29% of employees responded that they left their job or could leave due to the lack of financial stability in their organization. The significant rise of this factor (from 5th place last year) indicates that more employees are currently feeling fear of job cuts resulting from the company's financial problems.



limited
career path

A lack of career development prospects as a reason for leaving the job is pointed out by 27% of employees who participated in the study. This reason is particularly frequently indicated by Gen Z and Millennials (30% and 29%), and least important for individuals between 55 and 64 years of age (16%).

source: randstad employer brand research 2025 – poland

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how are states and companies responding to skills challenges in the defence sector today?

In response to the challenges of attracting and retaining talent, both companies operating in the defence sector and European governments are undertaking multi-directional actions, primarily including:

upskilling and reskilling talent

Companies are increasingly investing in upskilling and reskilling programs for employees, as well as developing academies and programs for individuals starting their professional careers. A good example of this is the work of BAE Systems, an international defence industry conglomerate, which plans [to train 6,500 young employees in 2025](#).

Upskilling and reskilling in the defence sector is also supported by the European Union through projects like the "Pact for Skills." This initiative aims to support public and private organizations in upskilling and reskilling their personnel.

To effectively carry out reskilling and upskilling for their workforce, defence companies are increasingly seeking support from specialized partners in this area, such as [Randstad experts](#). These experts diagnose skills gaps within organizations and design and implement effective

development programs aimed at fostering the skills needed for effective work in the defence industry.

public-private partnerships

Public-private partnerships (PPPs) are playing an increasingly important role in developing, retaining, and attracting talent for the defence sector in Europe. Collaboration between the state and private enterprises enables the pooling of resources, [the exchange of know-how](#), and the creation of training initiatives that increase the sector's attractiveness for qualified specialists.

By implementing joint research and development projects, co-financing educational programs, and offering clearly defined career paths, PPPs contribute to creating a more competitive and stable labour market in the defence industry. Additionally, the participation of private companies in the process of training and developing personnel allows for better alignment of employee competencies with real market needs, which promotes their long-term retention within organizations. ►

what does the future hold? forecasts for the european and polish labour markets in the defence industry.



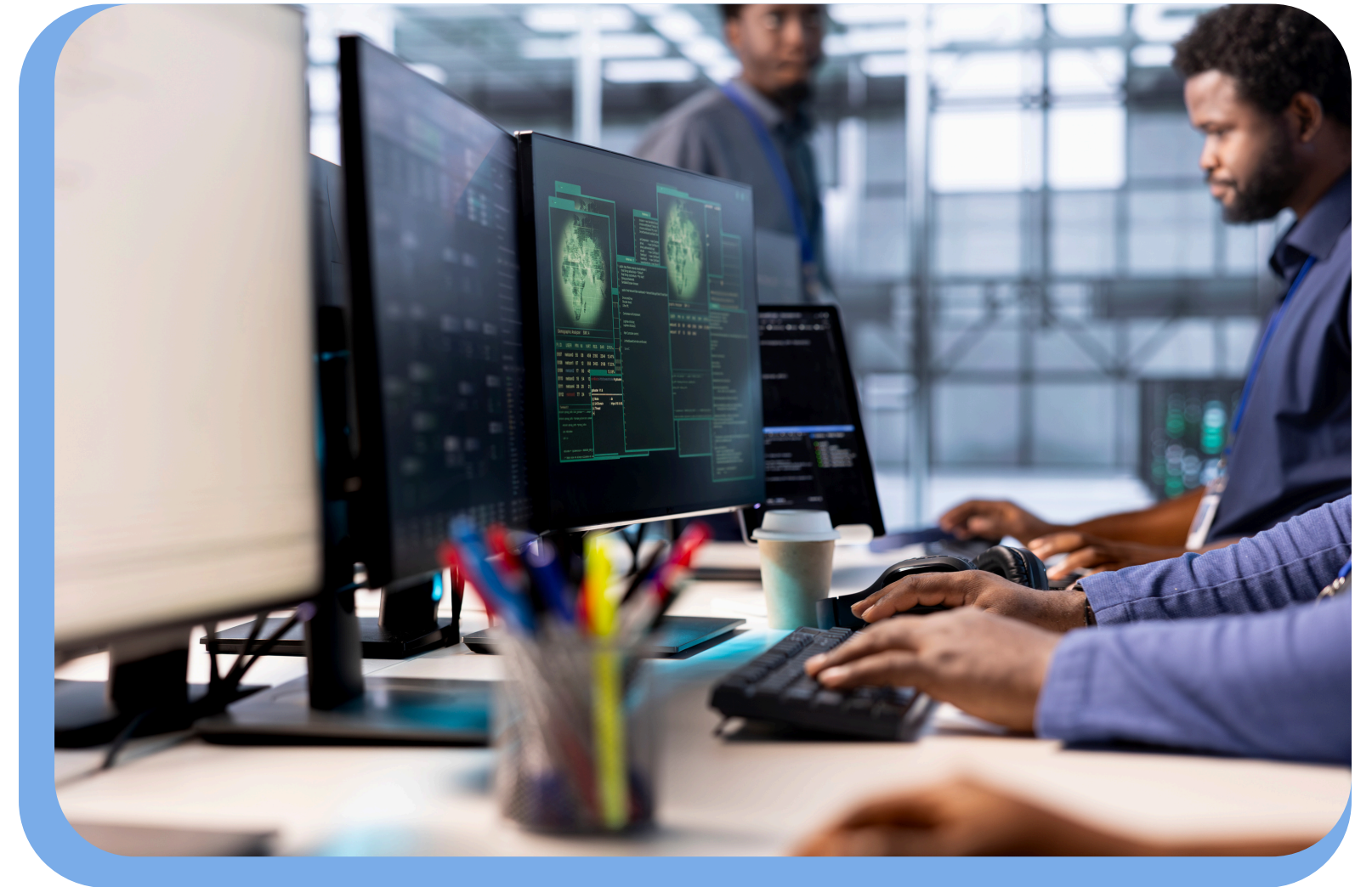
Examples of good practices in PPPs in the defence sector include German investments in modern training centers for helicopter pilots as part of [the NH90 Helicopter Programme](#).

recruiting armed forces veterans

More and more companies operating in the sector are actively recruiting armed forces veterans. In this way, organizations value and utilize the unique experience and skills of professionals who have an excellent understanding of the specifics of working in national defence. ■

the labour market in the polish defence industry. what opportunities and threats will shape its future?

In the face of dynamic geopolitical changes and increased defence spending, the labour market in the Polish defence industry today faces completely new challenges and development opportunities compared to just a few years ago. A SWOT analysis of the Polish labour market in this industry allows us to look at the most important strengths, weaknesses, as well as opportunities and threats that will influence the future of this sector.



what does the future hold? forecasts for the european and polish labour markets in the defence industry.



SWOT analysis of the labour market in the polish defence industry.

strengths

- growing and stable public funding for the defence sector from the state budget.
- prioritization of the industry by the government and strong declarations regarding investments and increased defence production in the country.
- long-term, strategic government orders ensuring predictability.
- growing strategic importance of the industry for national security.
- existing production and research potential of Polska Grupa Zbrojeniowa (Polish Armaments Group).
- dynamic development of innovative private companies.
- access to EU funds and programs supporting research and development (e.g., European Defence Fund).

opportunities

- opportunity for technology and know-how transfer when executing contracts with foreign partners.
- development of Polish armaments and military equipment exports to foreign markets.
- participation in international research and development projects (e.g., within NATO, EU), leading to the development of new competencies.
- ability to attract talent by emphasizing the mission related to national security and offering stable, promising job opportunities.
- development of dual-use technologies, opening new markets and collaboration possibilities.

weaknesses

- significant shortages of qualified staff, especially in new technologies (IT, AI, cybersecurity, unmanned systems) and specialized production skills.
- skills gaps and a mismatch between graduate qualifications and industry needs.
- continued strong dependence on political decisions and one main client (the Ministry of National Defence).
- aging workforce in some traditional specializations and plants.
- limited production capacities of the domestic industry (relative to the scale of modernization needs).
- current image of the industry as an employer that may be less attractive to the younger generation compared to other sectors (e.g., IT).

threats

- negative demographic trends – an aging society and a decrease in the working-age population.
- strong competition for talent (especially engineers and IT specialists) from other economic sectors, which often offer more attractive salaries.
- potential future state budget limitations that could impact the scale of orders.
- risk of top specialists moving to defence companies located in Western Europe, which may offer better conditions.
- insufficient flexibility and speed of adaptation of the education system to the dynamically changing needs of the industry.
- risk of "overheating" the labour market in key, deficit specializations, leading to a sharp increase in employment costs and difficulties in project implementation.

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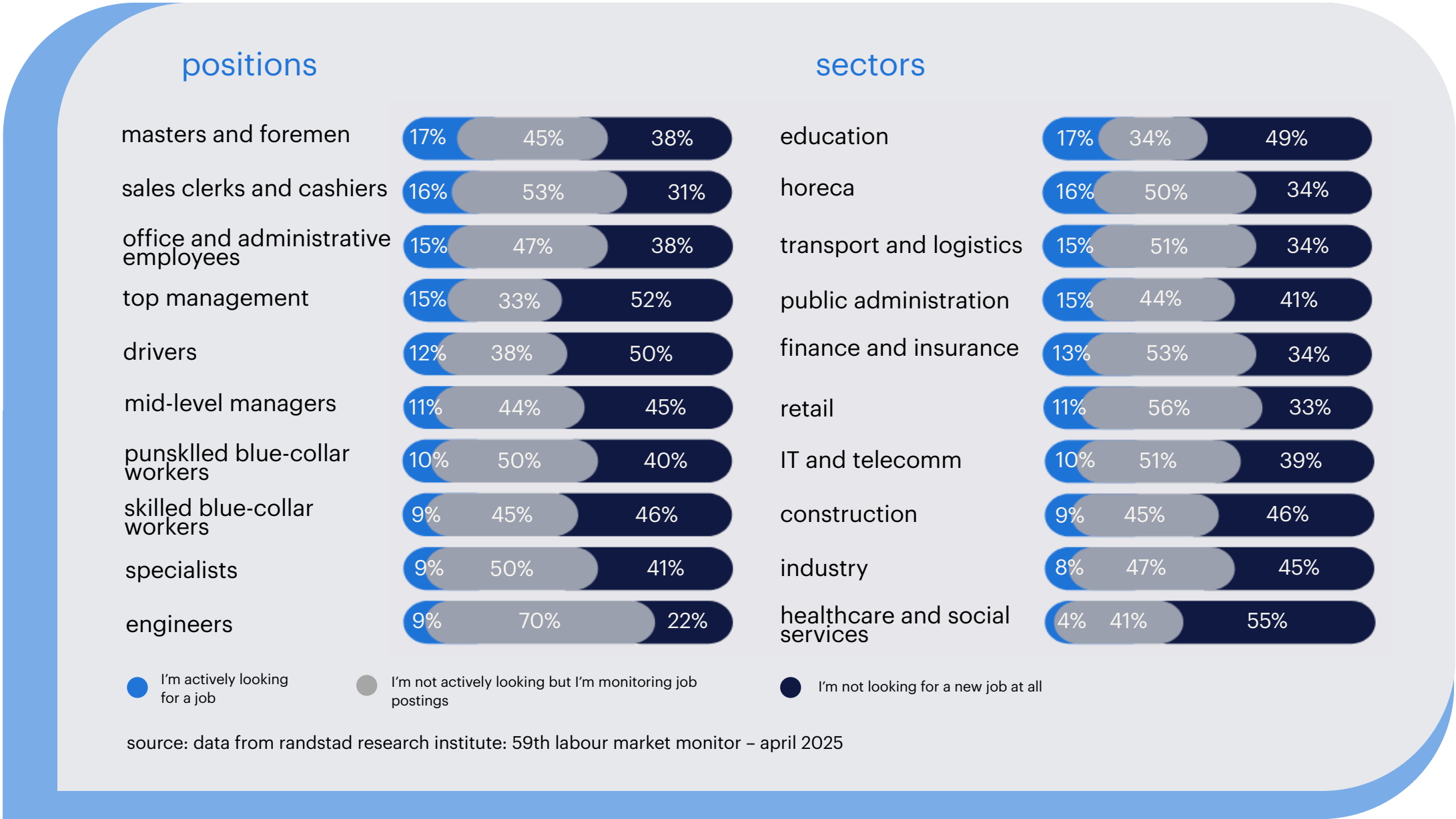


forecasts for the labour market in the defence sector.

Looking ahead, it can be predicted that both the European and Polish labour markets in the defence industry will continue to significantly and sustainably expand their human resources and increase employment.

This growth will be driven by increasing defence budgets and the need to boost production capacities, which is particularly evident in Poland in the context of ambitious plans for the technical modernization of the Polish Armed Forces and a significant increase in defence spending. **Talent shortages**, especially in digital engineering, artificial intelligence, cybersecurity, and advanced manufacturing, are **likely to persist** and may deepen, becoming the biggest constraint on the sector's development in both Europe and Poland.

The defence industry will have to face intense competition for specialists from other technology



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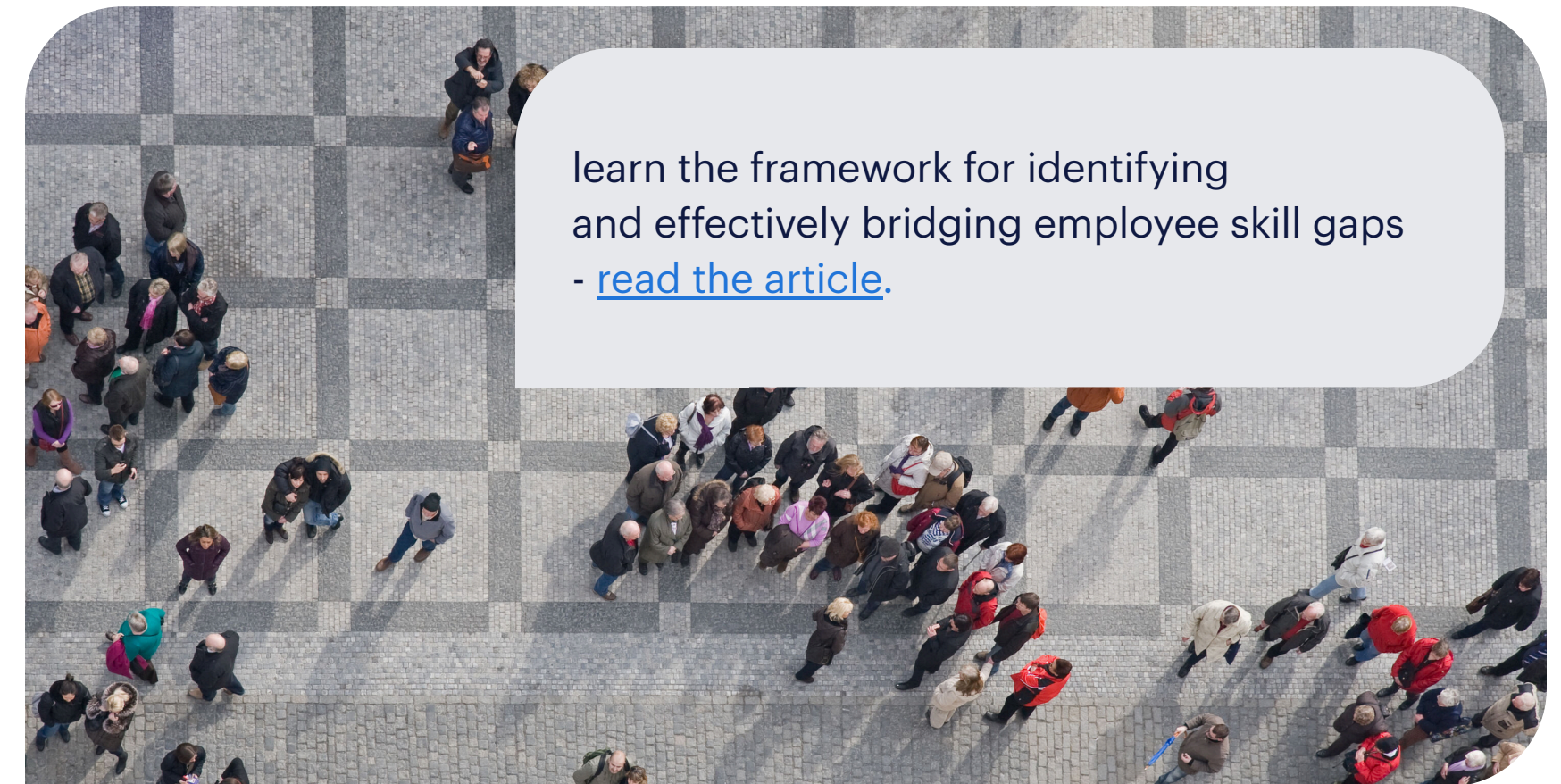


sectors, such as the dynamically developing IT sector, which is already clearly felt in the Polish market today. In turn, the fight for talent will force employers [to invest in attractive remuneration packages, working conditions, and career development opportunities](#).

A significant opportunity to effectively acquire specialists from other economic sectors is evident [in the latest data from the Randstad labour market monitor](#) (59th edition - April 2025). More than half of employees from the IT/telecommunications sector, almost 80% of engineers, and every second skilled manual worker are currently looking for new job offers or actively seeking new employment.

To effectively address both demographic challenges — such as an aging workforce and shrinking young worker resources (which is a problem in both Poland and Europe today) — and competition for talent, employers in the defence industry must already be thinking about [strategic investments in human capital](#). These should include upskilling and reskilling programs, close cooperation with the education sector, programs for young talents, and initiatives to improve the sector's image and attractiveness.

In summary, the prospects for the labour market in the European and Polish defence industry are strongly linked to its growth. However, fully realizing the sector's potential will require an urgent and strategic approach [to attracting, developing, and retaining key talent in the face of complex market challenges](#). ■



effective recruitment and talent development in an unpredictable market environment.



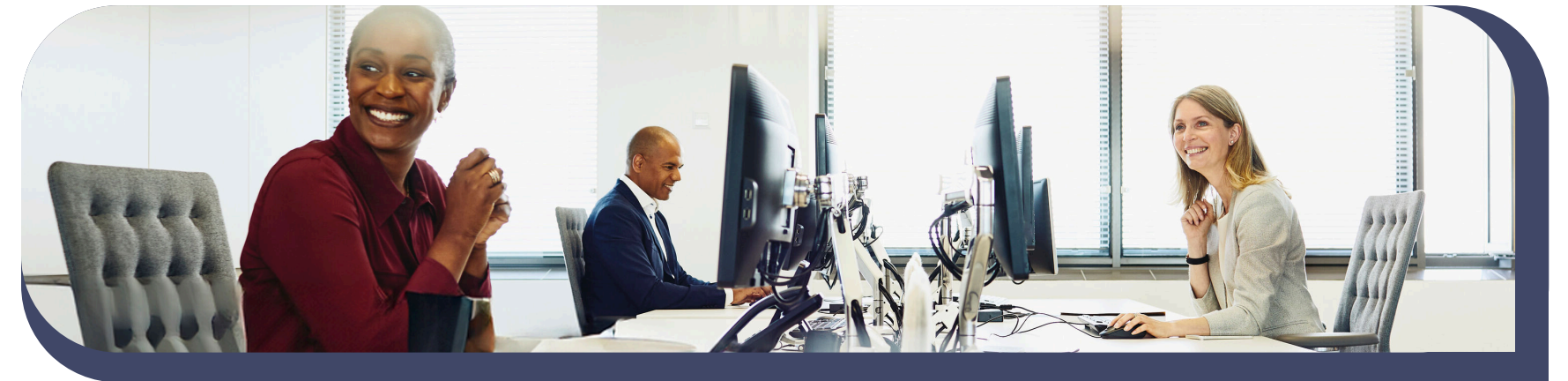
practical tips for the defence sector.

Effectively recruiting and developing talent in the dynamically growing, unpredictable, and complex market environment that the defence industry undoubtedly faces today requires a flexible, strategic, and proactive approach. In the following pages, we suggest strategies and actions worth considering in both these areas.

strategies supporting recruitment in the defence sector.

proactive talent pooling

Continuously identifying and building relationships with potential candidates, even if there are no open positions currently, helps create a strategic talent pool that shortens response time to critical competency needs within an organization. Proactive talent pooling is aided by a company's presence on social media (especially LinkedIn), at industry conferences, and at events connecting employers with potential candidates (e.g., job fairs).

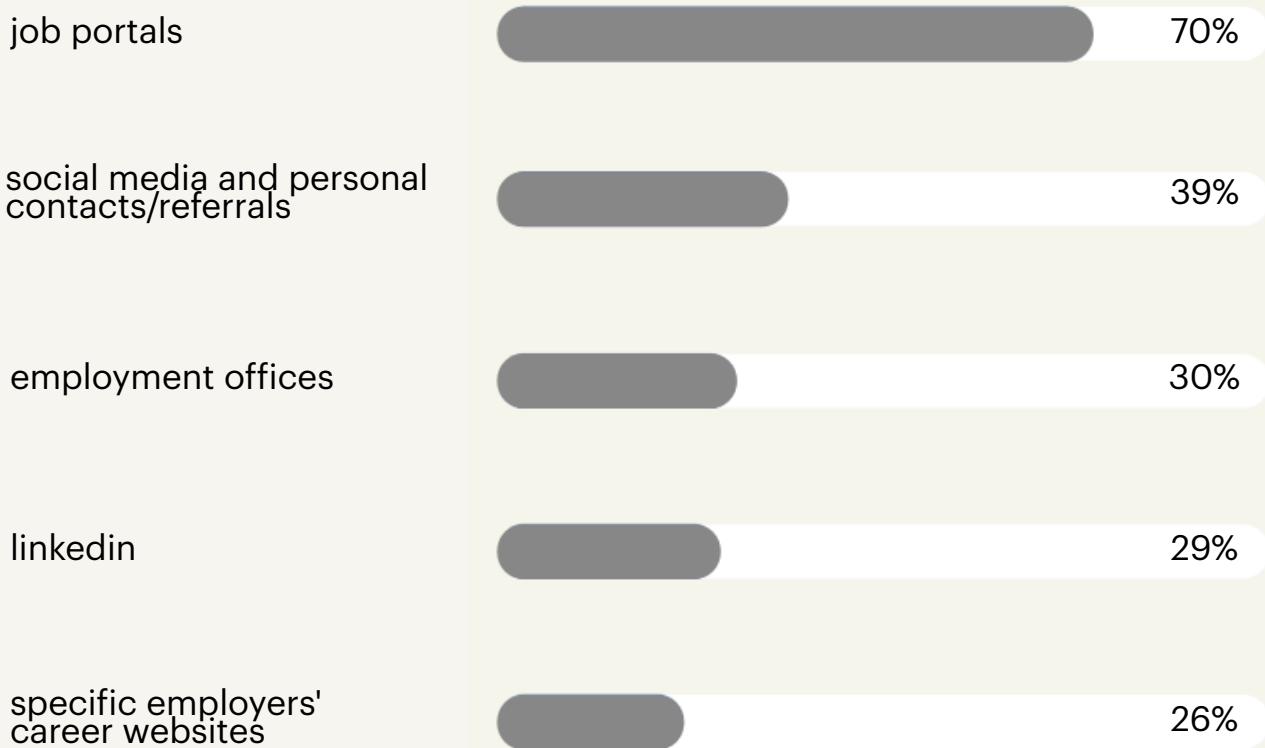


[Utilizing this strategy in the defence industry](#) can involve establishing strategic cooperation with an external recruitment partner who can help reach suitable candidates more quickly. It also includes participating in job fairs organized by technical universities (such as WAT, polytechnics) and building relationships with students and graduates of fields crucial to the industry (e.g., electronics, mechanics, computer science). Organizing open days at the company, during which projects and technologies used in the organization are presented to students and graduates, would also be a good solution. ►

effective recruitment and talent development in an unpredictable market environment.



where do polish employees look for job offers?



source: randstad employer brand research 2025 – poland

More flexible and faster recruitment can be achieved, for example, by **limiting the number of stages**, minimizing recruitment bureaucracy, and moving some process elements **to a virtual space**. Online recruitment tools allow for virtual interviews and competency tests, among other things. This lowers the barrier to entry for candidates while simultaneously easing the burden on HR departments and managers.

In the demanding defence sector, an agile recruitment process enables quicker staffing of strategic positions. However, it's crucial to remember that the digitalization of certain recruitment stages must be carried out while adhering to stringent data security requirements concerning the digitalization of personal data.

utilizing artificial intelligence (AI) and data analysis in recruitment

Leveraging artificial intelligence in recruitment helps increase the speed and precision of candidate selection, significantly reducing the time it takes to acquire talent. Algorithms analyze CVs and extract key competencies, thereby facilitating the matching of candidates to job openings and automating the initial screening of applications.

In defence companies, AI can, for instance, instantly identify engineering candidates with qualifications to work with industry-specific technologies. ►

flexible and fast recruitment processes

Streamlining the recruitment process reduces the time it takes to acquire key specialists, lowers operational costs, and maintains candidate interest.



effective recruitment and talent development in an unpredictable market environment.



It can also help determine which universities or research centers are seeing an increase in the pool of candidates with skills critical to the sector.

building a strong employer brand

A strong employer brand helps attract and retain top talent within a company. Building it involves consistently communicating the organization's unique values in the labour market, effectively responding to employee needs, and fostering positive employee experiences through proper motivation, compensation, ensuring a friendly work atmosphere, and offering opportunities for development and work on attractive projects from an employee's perspective. [For companies operating in the defence sector](#), this could include prestigious initiatives related to army modernization and defence innovations. It's also worth communicating the job stability characteristic of the defence industry.

More about building a strong employer brand and the factors that most often influence employer choice can be found in the [Randstad Employer Brand Research report](#).

competency-based recruitment

Competency-based recruitment allows organizations to more accurately identify and assess the true potential of candidates, without focusing solely on the work experience visible in a CV. It helps to look at what potential employees can do and how they solve real problems.

Competency tests, simulated tasks, and behavioral interviews provide objective data on technical skills and reactions to difficult situations and challenges. This is especially important in environments with high safety and responsibility standards, [such as the defence sector](#). What's more, this approach to recruitment minimizes the risk of incorrect staffing and increases the chances of success for strategically important projects.

flexible forms of employment

Flexible forms of employment—ranging from remote work (where security procedures permit), to B2B contracts, temporary employment, internships, and apprenticeships—broaden the pool of available talent and allow



effective recruitment and talent development in an unpredictable market environment.

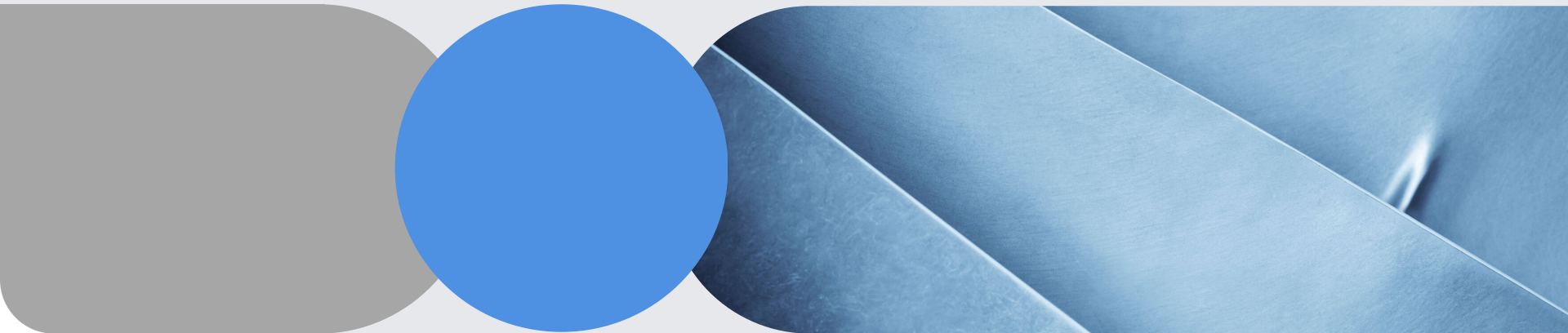


for rapid team scaling. And, as we read in the latest edition of the Randstad Employer Brand Research study, they are one of the factors most frequently influencing the decision to accept employment with a given employer: one in three candidates pays attention to the possibility of remote work when applying for a job. In turn, according to the Workmonitor Pulse 2025 report, autonomy in managing one's own working hours is the most desired form of flexibility by employees—even more important than salary.

Thanks to flexible forms of employment, organizations operating in the defence industry can respond more efficiently to changing project and budget priorities and the resulting changes in talent demand.

However, keep in mind that not all positions in the defence sector can utilize B2B or other flexible forms of employment due to the necessity of overseeing access to information within classified projects. Nevertheless, for many positions, this can be an optimal solution. ■

The specific nature of recruitment in the defence sector directly influences the shape of talent acquisition strategies. Smaller design companies, focused on innovation and research and development (R&D), approach the recruitment process differently than large production plants, for whom quick and scalable hiring of employees for production lines may be crucial. The challenge here is reconciling the restrictive requirements characteristic of the defence industry—especially regarding security and candidate verification — with the need for efficient, and often mass, acquisition of specialists and technicians.



effective recruitment and talent development in an unpredictable market environment.



strategies supporting competency development and talent retention in the defence sector.

continuous upskilling of staff (lifelong learning)

Introducing a culture of continuous learning into an organization helps keep pace with technological, regulatory, and market changes. This enables companies to maintain their team's competencies at a level that allows them to navigate a dynamic and unpredictable reality with ease. Support for expanding competencies is also one of the fundamental ways to increase talent retention. This is especially true given that [over 40% of employees in the Polish labour market state they changed jobs due to a desire for professional development.](#)

Regular employee training, as well as easy access to online courses, workshops, and certifications, fosters the effective creation of a lifelong learning culture within an organization.

[In the defence industry,](#) continuously acquiring new information in areas critical to national and international defence (today, for example, unmanned systems or protection against cyber threats) helps maintain

a valuable technological advantage and respond more quickly to the modernization priorities of the armed forces. ■



effective recruitment and talent development in an unpredictable market environment.



developing soft skills

Adaptability to change, critical thinking, and effective communication skills are just as crucial as technical knowledge today, as they determine the pace and quality of collaboration in a complex and unpredictable environment. That's why communication workshops and problem-solving training help build teams that quickly translate ideas into measurable results.

In the defence sector, strong soft skills facilitate dialogue among all parties involved in a process: engineering and production staff, project roles, managers, and institutional clients. This, in turn, accelerates the exchange of information on requirements and production capabilities, as well as equipment acceptance.

job rotation and interdisciplinary projects

Rotating roles and engaging employees in projects that combine different specializations break down organizational silos and accelerate knowledge transfer. This allows specialists to broaden their perspectives, and the company gains flexible teams that better understand the entire product lifecycle and more effectively identify optimization opportunities.

In the defence industry, rotating employees through different projects, positions, or departments not only helps talent gain a broader understanding of market and process complexities but also brings real value to the organization. For example, rotations between research and development (R&D) project teams and production mean that specialists familiar with both environments can identify potential production risks related to translating a project into a real product earlier. ►



michał wereszko
senior engineering consultant

From our experience, mentoring and coaching programs are not just tools for building professional competencies, but also an integral part of talent retention strategies. Professional individual coaching allows employees to look at their career from a new perspective – and feel that their work is important and aligned with personal aspirations. As a result, the organization gains more engaged specialists and leaders who are aware of their value.

effective recruitment and talent development in an unpredictable market environment.



mentoring and coaching

Mentoring programs facilitate the transfer of company and industry know-how. Through these programs, experienced specialists support younger colleagues, thereby shortening the time it takes to onboard into new responsibilities and gain proficiency in daily work. Mentoring is also an excellent way to strengthen the culture of intergenerational collaboration. Complementing this, individual coaching develops leadership competencies and boosts talent retention. Both initiatives translate into greater company operational stability and guarantee the continuity of long-term, complex projects, which are so **characteristic of the defence sector**.

utilizing technology for competency development

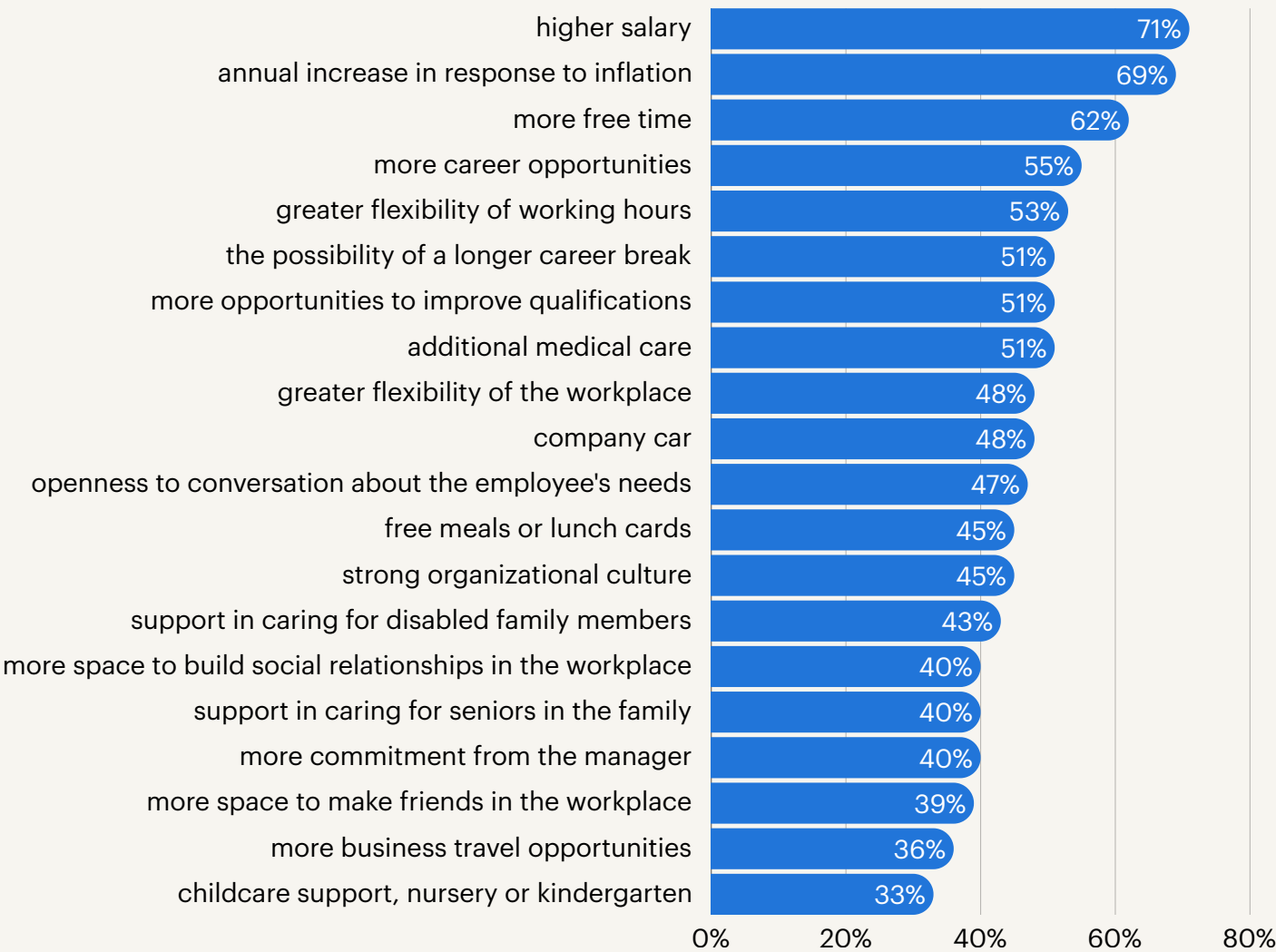
New technologies in the form of e-learning platforms and virtual reality (VR) simulations now allow for more engaging and scalable employee training than ever before. The convenience of such solutions also speaks to their inclusion in company training paths: employees can use them at any time of day and easily fit them into their schedules.

In the defence industry, this digital form of knowledge transfer and competency development facilitates the efficient implementation of new procedures and technological solutions without



what most influences talent retention?

source: workmonitor pulse 2025



effective recruitment and talent development in an unpredictable market environment.



the need for rapid organization of in-person training, which is especially important in a dynamic work environment. And interactive formats for building new skills help translate theory into practice more easily.

building an environment conducive to experimentation and innovation

Introducing a culture that is open to innovation, promotes experimentation, learning from mistakes, and free knowledge sharing helps companies react more quickly to technological and market changes. Companies that successfully implement a culture of innovation provide their employees with systemic support for initiatives that improve work processes or product functionality.

In the defence sector, an atmosphere that promotes creativity shortens the time needed to implement improvements in complex

projects, supports innovation, and facilitates a prompt response to changing client requirements.

monitoring and evaluating the effectiveness of training programs

Systematically assessing the effectiveness of training is typically based on analyzing business indicators, knowledge tests, and feedback from participants. This allows companies to verify whether investments in training programs genuinely enhance team competencies and efficiency. But that's not all. Ongoing monitoring of training effectiveness enables companies to swiftly adapt content to changing company priorities and direct training budgets to areas where there's an immediate need to raise the team's skill level.

In the defence sector, this approach increases confidence that employees always possess up-to-date knowledge in areas critical to the industry, such as cybersecurity or new technologies used in weapon systems. ■

effective recruitment and talent development in an unpredictable market environment.



key takeaways:

In the dynamically changing, unpredictable, and complex environment that the defence industry faces, effective recruitment and talent development require:

- proactivity and flexibility in talent acquisition.
- utilizing modern technologies (including AI) and data analysis in HR processes.
- building a strong employer brand that emphasizes the strategic importance of the industry and responds to employee needs.
- investing in continuous learning and the development of soft skills.
- fostering a culture of innovation.
- monitoring and adapting HR strategies to changing market and technological conditions.





how does Hyundai Rotem Europe acquire talent and address the challenges related to collaboration at the intersection of Polish and Korean cultures?



HYUNDAI
Rotem
EUROPE

case study - Hyundai Rotem Europe.



Hyundai Rotem Company, the parent company of Hyundai Rotem Europe, signed its first major contract with Poland for K2GF tanks in 2022. In 2025, it negotiated another, even larger, project concerning the supply of K2PL tanks. The company anticipates further development in Poland, based on the Polish national defence long-term action plan. Hyundai Rotem Europe plays a key role in this cooperation as a liaison between the Korean headquarters and the Polish client, the Polish Armed Forces. The company also aims to become a platform for Hyundai Rotem's development across Europe, building on the projects implemented in Poland.

Since formally commencing operations in May 2023, Hyundai Rotem

Europe quickly established an administrative center in Warsaw, a warehouse near Gdańsk, and a dispersed service structure in northeastern Poland. This was also when they began searching for their first employees.

Thanks to the strong and recognizable Hyundai Motor Group brand behind Hyundai Rotem Europe, the company had an easier time reaching candidates. Some of them eagerly awaited the project's start date – which was postponed for several months – claiming that "dreams aren't given up on." The second asset, which HRE believes helped in recruitment, was its involvement in the defence industry, currently one of the most stable and dynamically developing sectors of the economy. ►





challenges

Despite significant recruitment successes, Hyundai Rotem Europe also faces challenges:

1. **Location:** The military units where the company provides service are located far from major urban centers, making it difficult to attract employees.
2. **Specialized technical knowledge:** Candidates must possess unique knowledge regarding the construction and operation of tanks.
3. **Cultural fit:** The Korean work culture is unfamiliar to many candidates.

solutions

Hyundai Rotem Europe effectively addresses the first two challenges with **the support of a specialized recruitment partner**. Leveraging their knowledge of the defence sector's specifics, the recruitment partner efficiently reaches candidates with the appropriate technical qualifications.

Hiring retired soldiers who previously had contact with K2 Black Panther tanks during their military service has also proven particularly

helpful. Their prior experience and familiarity with the Korean work style made it easier for them to adapt to the new professional environment.

Regarding cultural differences, the company consistently conducts **educational initiatives** for both Polish and Korean employees. This minimizes misunderstandings and supports effective cooperation. Korean specialists show great openness to changing their own habits and adapting them to the work model of Polish specialists, which further strengthens relationships between the two teams.

how does Hyundai Rotem Europe recruit the best talent on the market?

The recruitment process at Hyundai Rotem Europe is divided into several stages.

Initial recruitment activities are entrusted to proven agencies that fully understand the company's expectations. This allows for effective vetting of candidates at an early stage, both in terms of competencies and cultural fit.

Subsequent stages are managed internally by the recruiter and direct supervisors. The HR department is responsible for all candidate communication, coordinating interviews, and maintaining the high quality





of the entire process. This allows HRE to control which candidates are invited to advance, better tailor the process to the team's real needs, and simultaneously ensure the company's expectations and work style are accurately presented to the candidate.

The HR department's role in the recruitment process **doesn't end when a contract is signed with a candidate**; it also includes comprehensive onboarding support, ongoing communication between teams, and manager assistance. This helps build realistic expectations on both sides, which significantly facilitates the integration of new employees.

In HR's recruitment, it's not just about quick hiring. **The most important factor is fit**. This includes both competency and personality – especially within a structure where some decisions come from headquarters and daily collaboration often occurs at the intersection of different cultures. It's an environment that fosters openness and strengthens the ability to build partnership relationships across differences.

future plans

In the near future, HRE plans to **significantly increase** staffing in its service teams. The company is looking for engineers with experience working with heavy machinery, electronics, and diagnostic

systems. Strong assets for desired candidates will also include previous military experience, flexibility, patience, openness, and the ability to adapt to work in an international, hierarchical environment.

Hyundai Rotem Europe also currently has recruitment ongoing for **support departments** (sales, marketing, project management, administration, HR, and accounting). In these areas, the company emphasizes candidate self-reliance, strong communication skills, and the ability to operate in a multicultural work environment. Beyond hard skills, empathy and the ability to "read between the lines" are crucial here, as they are essential for daily collaboration at the intersection of two distinct cultures. ■



kyungtae kang

ceo, Hyundai Rotem Europe

potential of the polish labour market for defence industry investors.



key information set.

Thanks to its solid technical traditions and still competitive labour costs, Poland today offers companies operating in the defence sector—both those already present in Poland and those considering reinvestment or expansion of existing structures—one of the most attractive labour markets in Europe. What specific factors contribute to the attractiveness of the Polish labour market for defence industry investors? We've gathered some of the most important information on this topic.

technical traditions and education

Poland boasts an extensive network of technical and vocational universities. According to data from the Central Statistical Office, Polish technical universities annually supply the labour market with tens of thousands of graduates in fields crucial for the defence industry, including mechanical engineering, electrical engineering and electronics, computer science, and automation and robotics. A stable supply of educated specialists lowers recruitment costs and facilitates long-term employment planning.

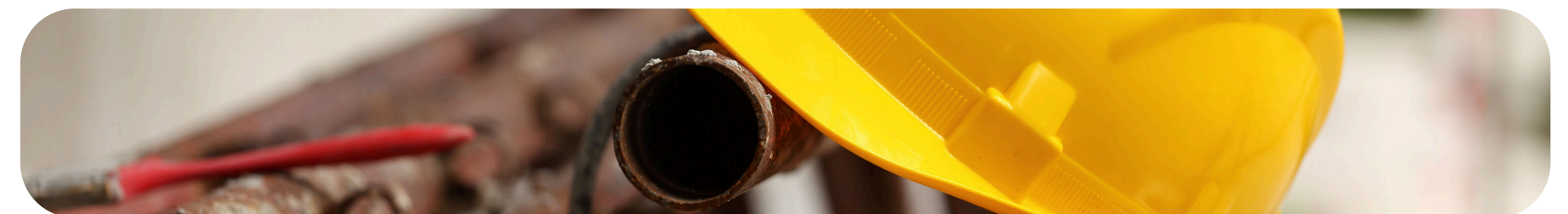
availability of qualified staff from related sectors

A strong machinery, aviation, and automotive industry provides experienced professionals in metal processing, precision assembly,

logistics, and automation. The transfer of competencies between sectors accelerates the launch of new production lines and the modernization of existing plants.

government support for vocational education

Government programs aimed at adapting vocational education to the needs of the labour market and the engagement of enterprises (including Polska Grupa Zbrojeniowa) in vocational education guarantee a steady supply of qualified technicians and specialists. ►



potential of the polish labour market for defence industry investors.



growing demand for specialists – the effect of modernization and exports

The massive technical modernization program of the Polish Armed Forces and the increasing international interest in Polish military equipment (e.g., Krab self-propelled howitzers, Piorun missile systems) are driving demand for weapon system engineers, as well as specialists in fields like electronics, cybersecurity, manufacturing, and military logistics. Investors can count on stable demand for qualified personnel, which secures their investments in human resources.

competitive labour costs

Despite systematic wage increases, the rates for highly qualified engineers and technicians remain competitive compared to Western European countries. This cost advantage translates into higher profitability for investments and reinvestments in Polish facilities.

young, ambitious workforce

A relatively large population of educated individuals in working age, growing interest in technical and engineering fields (partially driven

by the development of modern technologies), and the openness of young people to acquiring new competencies mean that defence companies can count on access to a large pool of young talent. This fosters innovation and further development of their structures. ►

For investors looking to develop structures in the Polish defence industry, competitive labor costs are a significant "pro" – especially for engineering and technical positions. According to Eurostat data, average labor costs in Poland still deviate significantly from those in Western European countries: although they are rising, they remain almost twice as low as the EU average.

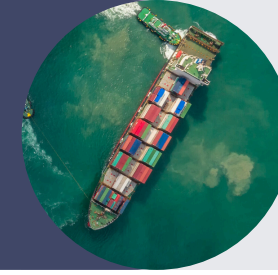
[source](#)



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national sales and account manager

potential of the polish labour market for defence industry investors.



defence sector: attractive for both investors and employees.

With an appropriate strategy for attracting and retaining talent and by building an attractive recruitment offer, companies operating in the defence sector that decide to start investments in Poland or expand their structures here can count on stable access to qualified personnel with technical competencies and a solid industrial and research base at a favourable cost structure. It's important to remember that investments in the defence sector positively impact the condition of the entire Polish employment market—they generate high-quality jobs in many regions of the country, and due to the specificity of defence projects, they ensure stable employment for talents for years to come. All these factors combined make the defence sector an attractive industry not only for investors but also for employees and candidates.

Experts at Randstad help harmoniously connect these two worlds by supporting companies in the defence industry and related sectors in identifying and understanding the trends shaping the labour market, and then translating them into effective strategies for acquiring and retaining talent within organizations.

Contact us to start a conversation about your needs for attracting and retaining qualified employees in your company. ■

>>let's talk<<

