



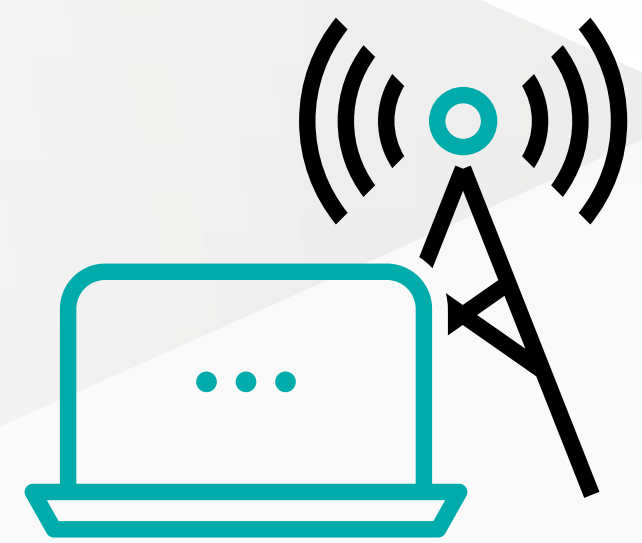
# **CYBERSECURITY MARKET IN POLAND 2023**

**MARKET ANALYSIS AND DEVELOPMENT FORECASTS FOR 2023-2028**

**IMPACT OF INFLATION AND WAR IN UKRAINE**



# About the report



Spending on cybersecurity by companies in Poland is gradually increasing. In 2023, the market will exceed PLN 2.5bn. In addition to a company's infrastructure and systems, there is also a gradual increase in awareness and emphasis on securing the data processed within businesses. **PMR's research shows that the need to secure data and to invest in this area is currently accentuated most strongly by large industrial companies. 65-70% of them (depending on the type of industry) indicated this area as an absolute priority and requiring investment in cybersecurity.** One possible reason for this may be that the industry has highly complex and sensitive systems that are closely linked to production processes.

The cybersecurity market is shaped not only by the laws of supply and demand, but also in a special way by the regulatory authorities, which are setting further security standards in response to changing market realities, including the development of cloud environments.

PMR's "**Cybersecurity market in Poland 2023**" report sizes the cybersecurity market in terms of budget allocation in particular consumer groups and industries in Poland, as well as provides the breakdown of spending on particular types of solutions. The report presents the latest megatrends regarding cyber threats. It assesses the popularity of cybersecurity solutions in Poland compared to global trends. It also analyses the impact of macroeconomic factors on the various market segments and product and service groups in the cybersecurity industry, and contains market development forecasts up to 2028.



# About the report

## Main objective:

To present a comprehensive analysis of the cybersecurity market and its mid- and long-term development forecasts.

## Additional objectives:

The specific objectives of the research and analysis carried out for the report were to identify:

- cybersecurity spending relative to the entire IT market
- key macroeconomic, demand-side, supply-side and legal trends and factors affecting the cybersecurity market
- changes in the threat level in cyberspace
- the major players operating in individual segments of the cybersecurity market, broken down into groups of entities (hardware and application manufacturers, distributors and VARs/VADs, integrators and service providers, including telecom operators (e.g. NOC services) and data centre providers)
- key events in the cybersecurity market

**Time span:** ..... 2013-2022

**Forecast horizon:** ..... 2023-2028

**Geographic coverage:**..... Poland

## What information can be found in the report?

- market value in 2013-2022
- market structure in 2013-2022, by segment
- vertical market structure in 2013-2022, by type of business entity and economic sector
- key events
- macroeconomic, demand-side, supply-side and legal factors affecting the market
- cybersecurity trends in the wake of the war in Ukraine
- major players operating in each segment of the market
- development forecasts until 2028 for:
  - the cybersecurity market in Poland
  - the main segments of the cybersecurity market and its vertical structure, in detail broken down into types of entities (clients) and the most important branches of the Polish economy and public sector (amount of budgets)
  - changes in macroeconomic factors

# Subject matter and scope

## SCOPE

As part of our analysis of the cybersecurity market, we considered two main groups of cybersecurity products and services:

### Breakdown into hardware, software and services

#### Breakdown into individual solutions:

Network and system security

- application protection
- data privacy
- data protection
- infrastructure protection
- network security hardware

Endpoint security

- access control
- endpoint security applications

Consultancy and solution implementation and integration

- risk management
- security services

Security outsourcing and managed security services (MSS)

Cloud security

Other

## SUBJECT MATTER

- macroeconomic situation and its impact on the cybersecurity market
- value and growth rate of the cybersecurity market
- structure of the cybersecurity market, broken down into hardware, services and software
- structure of the cybersecurity market, broken down into network and system security, endpoint security, consulting, solution implementation and integration, security outsourcing and managed services
- structure of spending on cybersecurity, by entity and industry
- cybersecurity trends in the B2B and B2C sectors, in particular in the light of the war in Ukraine
- overview of key regulations affecting the cybersecurity market
- key trends and tendencies identified in the domestic and international markets
- listing of the major players in the cybersecurity market
- profiles of the market players, broken down into distributors/VADs and integrators, integrators and suppliers, hardware and software producers, and telecommunication and data centre operators
- forecasts for the value of the market and each of its segments



# Dedicated survey for the report

For the purposes of this report, PMR conducted a survey on a sample of 603 large companies and SMEs. The survey was conducted in H1 2023 using the computer assisted telephone interviewing (CATI) technique. It covered the population of companies based on the primary code according to the Polish Classification of Business Activity (PKD).

## The following topics were considered in the cybersecurity section:

### ● Tools/solutions used

- anti-virus/anti-spam/anti-spyware – solutions to protect against viruses, unwanted and dangerous e-mail correspondence and against invasive spyware
- UTM (Unified Threat Management)/NGFW (Next Generation Firewall) – hardware solutions, usually in the form of a single device, enabling multi-faceted network security
- IDS (Intrusion Detection System)/IPS (Intrusion Prevention System) – intrusion prevention solutions and systems of detection and continuous monitoring of computer networks to block attacks in real time
- DLP (Data Leak Prevention) – solutions to protect against accidental data loss or theft
- VPN (Virtual Private Network) IPSec, SSL – solutions to securely connect remote computer networks using encrypted channel
- SIEM system (e.g. MicroFocus Arcsight, Splunk, RSA Security Analytics, IBM QRadar)
- Incident management system

- Anti-APT system
- Anti-DDoS system
- DAM database protection system
- WAF web application protection system
- Privileged account management system
- Identity management system
- GRC system (governance, risk management and compliance)
- OT security monitoring and Asset Management system
- SOC/SOAR system

### ● External services

- ICT security audit
- ICT security tests (pentests)
- Cybersecurity training

### ● Additional services

- Backup and archiving
- Disaster Recovery Office (DRO)
- Disaster Recovery Centre (DRC)

### ● Cybersecurity technologies

- AI and deep learning
- Cloud
- User behaviour analytics (UBA)

# Additional information about the report

## FORECASTS

For the purpose of the report, long-term development forecasts were prepared using econometric models and historical time series.

They cover the period of 2023-2028.

In addition to projections for the market value and its segments, the report also covers forecasts for 2023-2028 for selected demographic and macroeconomic indicators, including:

- per capita GDP and GDP real growth rate
- inflation
- average annual LFS unemployment rate and real change of average monthly gross wage in Poland
- value of expenditure covered with European funds
- real change in disposable income of Polish households and private consumption
- number of Poland's residents and share of each demographic group

Together with the report, we provide the most important data in the Excel spreadsheet for individual aggregation.



# Benefits of purchasing the

## The report answers, for instance, the following questions:

- What is the value of the cybersecurity market in Poland?
- What are the major trends in the cybersecurity market?
- What is the impact of the war in Ukraine on cybersecurity and threat risks?
- What is the real growth rate of the cybersecurity market?
- What are the shares of hardware, services and software in the cybersecurity market?
- Which cybersecurity solutions prevail in the market in terms of value?
- What regulations are affecting the cybersecurity market?
- What is the impact of digital transformation on the cybersecurity market?
- Which cybersecurity solutions are most popular in the B2B sector?
- What is the size of companies that spend the most on cybersecurity solutions, and which companies will increase their expenditure most?
- Which industries allocate the largest amounts to cybersecurity?
- Which cybersecurity solutions are developing the fastest?
- What are the global trends in the cybersecurity market?
- What are the trends in the market of cybersecurity software, hardware and services?
- What is the competition in this market and what are the strengths of individual suppliers in the cybersecurity market?





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