



CLOUD COMPUTING MARKET IN POLAND 2024

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2024-2029



PMR's analysis shows that the cloud computing market in Poland has been experiencing high growth rates for over a decade, which will be maintained in the coming years. The development of the cloud computing market is driven by several factors. Recently, the COVID-19 pandemic has been a crucial issue, leading to a surge in investment in solutions improving remote work and the security of company resources. Despite the return to pre-pandemic conditions, the remote working trend continues.

The rise in the value of the cloud computing market is also a result of the ongoing digital transformation of businesses in Poland and the associated increased demand for tools and services based on that technology. The expansion of the largest global providers and the development of so-called cloud regions in Poland have also been contributing to the growing interest in cloud solutions and thus the market value.

PMR's report "Cloud computing market in Poland 2024" measures the cloud computing market broken down into individual categories and segments. It presents key data and trends in the analysed market, based on PMR's B2B survey. The individual market segments are also analysed in the context of the macroeconomic situation. Based on these analyses, development projections up to 2029 have been created.



Main objective:

presentation of a comprehensive analysis of the cloud computing market in Poland together with mid-term and long-term forecasts of its development

Additional objectives:

- **presentation of the value of the cloud** computing market in Poland
- **analysis of the individual segments that** make up the cloud computing market: **models** (public cloud and private cloud, and division into SaaS, IaaS and PaaS), **customers** (microenterprises, SMEs, large enterprises and public institutions), **distribution channels** (manufacturers, partners, resellers) and **economy sectors**
- **discussion of the impact of the macroeconomic and geopolitical** situation on the cloud computing market and its growth rate in 2024-2029
- **presentation of the main trends** in Poland and worldwide
- **mapping of the competition and presentation of profiles of major players** operating in the cloud computing market in Poland

What can be found in the report?

- **value and growth rate** of the cloud computing market in Poland
- **breakdown of spending** in the cloud computing market by segment, including:
 - private and public cloud
 - SaaS, IaaS, PaaS
 - microenterprises, SMEs, large enterprises and public institutions
 - economic sectors
 - distribution channels for cloud services: manufacturer, partner and reseller
- **SWOT analysis** of the cloud computing market
- **regulatory environment of the** cloud computing market
- **PMR's research findings** in the field of the cloud computing market
- **public cloud service prices**
- **market development forecasts**, broken down into segments
- **main trends** in the data processing market in Poland and worldwide, and international comparisons
- **competitive environment and profiles of** cloud computing providers

TIME SPAN: 2014-2023

FORECAST HORIZON: 2024-2029

GEOGRAPHIC COVERAGE: Poland

SUPPLY RANGE:

cloud computing services are provided in the Polish market by the largest global hyperscalers (Amazon Web Services, Microsoft Azure and Google Cloud Platform) as well as other international and local providers

SUBJECT MATTER

- macroeconomic situation and its impact on the cloud computing market
- value and growth rate of the cloud computing market
- structure of the cloud computing market, broken down into segments
- PMR's research findings in the field of the cloud computing market
- analysis of public cloud services prices in the cloud computing market in Poland
- profiles of players operating in the cloud computing market
- regulatory environment affecting the cloud computing market
- trends in the Polish and global cloud computing market
- forecasts for the value of the market and each of its segments

PRODUCT CATEGORIES

In our analysis of the market, we have considered the following segments:

Models

- public cloud
- private cloud
- SaaS
- IaaS
- PaaS

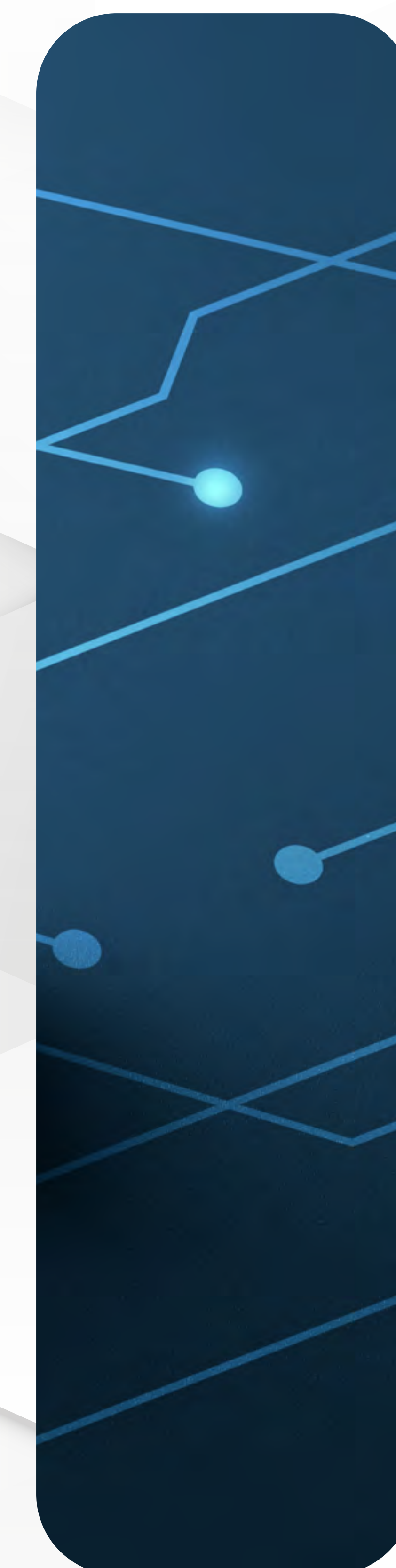
Customers

- microenterprises
- SMEs
- large enterprises
- public institutions

Economic sectors

Distribution channels

- manufacturers
- partners
- resellers



FORECASTS

Long-term market development forecasts were prepared for the report using econometric models and a 10-year time series.

The forecasts cover the period of 2024-2029.

These include detailed forecasts for:

- key macroeconomic indicators
- key demographic indicators and projected number of companies
- value and growth rate of the cloud computing market
- value and growth rate of the markets more or less related to the cloud computing market:
 - IT market in Poland
 - data centre market in Poland
 - outsourcing market in Poland
- value and growth rate of individual segments of the cloud computing market

RESEARCH METHODS

The report on the cloud computing market is based on the analysis of information from both secondary data and PMR's own research.

In January 2024, PMR conducted a survey among businesses in Poland on the use of cloud computing services. 500 interviews were conducted for the purposes of the study. The survey was carried out using the CATI technique.

Secondary sources include:

- corporate financial documents
- monitoring of industry sources and platforms operating in the market
- data from statistical offices (GUS, Eurostat)
- data from industry organisations.

Why to buy this report, i.e. what important questions it answers:

- What is the value of the cloud computing market in Poland?
- What trends prevail in the cloud computing market?
- How do new technologies affect the cloud computing market?
- What legislation has influence on the cloud computing market?
- Which segments of the cloud computing market grow the fastest?
- Which cloud services distribution channel brings in the most revenue?
- What is the value of individual segments of the cloud computing market?
- Which types of cloud are used by companies in Poland?
- What are the development prospects for the cloud computing market?
- What is the competition environment in this market and what are the strengths of individual providers in the cloud computing market?
- What are the price ranges for public cloud services in the cloud computing market?
- What is the impact of the war in Ukraine on the cloud computing market?

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





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