

ICT MARKET IN POLAND 2023

MARKET ANALYSIS AND DEVELOPMENT FORECASTS FOR 2023-2028

— **IMPACT OF INFLATION AND WAR IN UKRAINE**

About the report

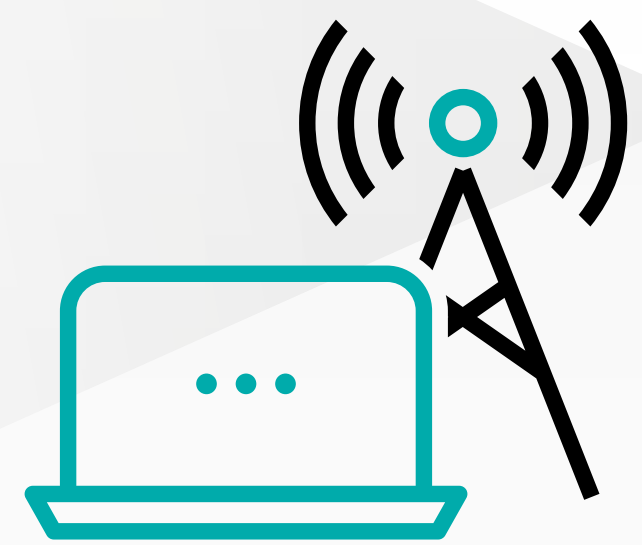
Recent years have been a period of intense ICT sector development owing to the dynamic digital transformation. Despite worldwide uncertainties related to the pandemic, the war in Ukraine, the energy crisis and high inflation, the industry continues to experience growth.

Particularly in times of difficult macroeconomic conditions, it is vital to increase the competitiveness of companies, and the key to this is digitisation and process automation.

The consumer sector is also an important factor in market development. The IT industry consistently performs well in challenging external conditions. In 2022, growth in the IT services sector in Poland reached double digit levels, exceeding 13%. The growth of the whole market was slightly lower; however, it is worth noting that the entire ICT industry in Poland already has its 'mass' - our forecasts for 2023 indicate the value of the market exceeding PLN 120bn.

Despite the promising results, the industry is looking to the future with caution due to the economic downturn, high inflation and geopolitical uncertainty. Transformation processes and investments in individual economic sectors, on the other hand, must continue.

PMR report **"ICT Market in Poland 2023"** is a detailed analysis of the sales of hardware, services and software, and of the structure of IT spending of particular customer groups and industries in Poland. The publication contains the latest data, obtained through: direct contact with market players, the analysis of their financial results and PMR's own research studies. The report analyses the impact of current trends in digital transformation in business, consumer trends and the macroeconomic environment on different market segments and product and service groups in the diversified IT industry.



About the report

Main objective:

To present a comprehensive analysis of the IT 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:

- IT market segments and their development forecasts
- key macroeconomic, demand-side, supply-side and legal trends and factors affecting the IT market
- trends in the use of IT solutions in business and households
- major players operating in each IT market segment
- key events in the IT market

Time span: 2009-2022

Forecast horizon: 2023-2028

Geographic coverage:..... Poland

What information can be found in the report?

- market value in 2009-2022
- market structure in 2009-2022, by segment
- vertical structure of the market in 2009-2022, by type of business entity and economic sector
- key events
- macroeconomic, demand-side, supply-side and legal factors affecting the market
- trends in the use of IT solutions in business and households
- major players operating in each segment of the market
- development forecasts until 2028 for:
 - the ICT market in Poland
 - main segments of the IT market
 - changes in macroeconomic factors

Subject matter and scope

SCOPE

IT hardware

- Laptops
- Desktop computers
- Servers
- Tablets
- Printing devices
- Smartphones
- Other

IT services

- Integration services
- Consulting/advisory services
- Training
- Outsourcing services (by subcategory)
- Maintenance
- Other

Software (including SaaS model)

- CRM
- ERP
- BI
- Databases
- Games and education software
- Operating systems and office software
- Security applications and systems
- Other

SUBJECT MATTER

- macroeconomic situation and its impact on the ICT market
- value and change of the ICT market, broken down into IT market and telecommunications
- structure of the IT market, broken down into hardware, services and software
- breakdown of IT expenditure, by business entity and industry
- IT trends in particular industries
- volume and value of hardware sales: laptops, desktop computers, tablets, printing devices and smartphones
- smartphone sales, by B2B and B2C segment
- value of software and IT services markets, by segment
- key trends and tendencies identified in the market
- major players in each segment
- value and volume forecasts for the hardware market



Additional information

FORECASTS

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

The forecasts 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 REPORT

The report answers, for instance, the following questions:

- What is the value of the IT market in Poland?
- What are the prevailing trends in the IT market?
- What are the shares of hardware, services and software in the IT market?
- What are prospects for the market in the face of negative macroeconomic and demographic forecasts and changes in the household structure?
- What is the impact of digital transformation on the IT market?
- What IT solutions are used in each industry?
- What is the size of companies that spend the most on IT solutions, and which companies will increase their expenditure most?
- Which industries invest the most in digitisation?
- What are consumer trends in the use of IT hardware?
- Which IT services are developing the fastest?
- What factors most severely affect the prices of IT products and services?
- What are the trends in the software market?
- What is the outlook for the market for each type of hardware?



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