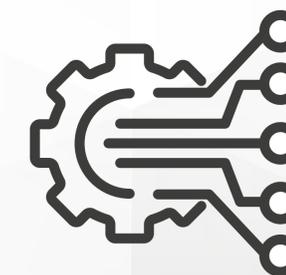




DIGITAL TRANSFORMATION MARKET IN POLAND 2024

MARKET ANALYSIS AND DEVELOPMENT FORECASTS FOR 2024-2028

IMPACT OF INFLATION AND WAR IN UKRAINE



About the report



Digitalisation is a trend that now covers almost every aspect of life for both consumers and entrepreneurs. It is of particular importance in the business sector, where the degree of implementation of modern technology has become one of the key aspects of a company's competitiveness. The pace of digitalisation has accelerated considerably in recent years, and the ongoing AI revolution has provided a further stimulus.

The approach to digital transformation and individual technology solutions is very much dependent on the industry in which a company operates, which is why **PMR vertically targets detailed profiling of the most important sectors of the economy in its analysis and research. In addition, an attractiveness index covering as many as 23 industries was modelled for the analysis of digital transformation potential.**

PMR's report "**Digital transformation market in Poland 2024**" provides a mapping of the digital transformation market in terms of the allocation of budgets by individual industries in Poland, as well as a survey of companies in terms of the use of various solutions and an assessment of objective fulfilment in individual business areas. The report also presents an analysis of industry trends and touches on legal and regulatory issues, as well as examines the impact of macro factors on the market and provides market development forecasts up to 2028.

A comprehensive analysis along with development forecasts can be found in PMR's latest report "Digital transformation market in Poland 2024".



Objectives and subject matter

Main objective:

To present a comprehensive analysis of the digital transformation market in Poland and its mid- and long-term development forecasts.

Additional objectives:

For the purposes of the report, a number of surveys and analyses were carried out, the precise objectives of which were to identify:

- value and growth rate of the market in 2019-2023
- vertical market structure in 2019-2023, broken down into economic sectors
- attractiveness metrics for industries in terms of their appeal from the perspective of ICT providers
- macroeconomic, demand-side, supply-side and legal factors affecting the market
- key trends of digital transformation in Poland
- major players providing ICT solutions for individual industries

and to prepare forecasts until 2028 for:

- the digital transformation market in Poland
- detailed vertical structure, broken down into the most important sectors of the Polish economy (amount of budgets)
- macroeconomic factors

Subject matter:

- macroeconomic situation and its impact on the digital transformation market
- value and growth rate of the digital transformation market
- vertical structure of the digital transformation market, by industry:
 - trade and e-commerce
 - ICT
 - healthcare
 - construction
 - heavy industry
 - finance
 - transport
- business attractiveness index in terms of potential implementation of digital transformation solutions (23 economic sectors, by PKD code)
- overview of key regulations affecting the digital transformation market
- identification of key trends and tendencies in the domestic market and international benchmarks
- listing of major players providing ICT solutions for individual industries
- value forecasts for the digital transformation market and its vertical structure, by industry



Scope of the report

SCOPE

The report examines companies in detail in terms of their use of the following digital transformation solutions:

Business management solutions

- ERP
- Order management
- BPM
- RPA
- IoT

Analytical solutions

- AI
- Big data, data warehouse, business intelligence
- Decision-making, analytical, predictive and adaptive analytical solutions

Project and document management solutions

- Solutions supporting digital project management
- Digital document workflow solutions
- CMS and document management solutions
- Collaborative working solutions
- Mobility solutions

Sales, marketing and customer service solutions

- CRM
- E-commerce solutions for developing online sales
- Multichannel customer communication solutions
- Customer service solutions

Technology and integration solutions

- IT department automation solutions
- Rapid application development solutions for business applications
- Integration solutions and microservices

Time span: 2019-2022
and estimates for 2023

Forecast horizon: 2024-2028

Geographic coverage: Poland



Dedicated survey for the report

For the purposes of the report, PMR conducted a survey on a sample of 611 large companies and SMEs.

The survey was conducted in H1 2023 using the computer assisted telephone interviewing (CATI) technique.

The study covered the population of companies based on the primary code according to the Polish Classification of Business Activity (PKD). In the digital transformation section, questions were asked not only about specific digital transformation solutions, but also about the assessment of digital transformation objectives fulfillment in the following areas:

- customer relations and sales,
- process, flexibility and business,
- cost, efficiency, infrastructure,
- product and innovation,
- communication, collaborative working, compliance.



Attractiveness index – methodology

The attractiveness index covers 23 sectors of the Polish economy in terms of potential digital transformation. It was developed on the basis of the pattern method, which is one of the linear ordering methods.

For its preparation, data from reports on companies' revenues, costs and financial results, as well as on the use of ICT in companies, were used.

From the available pool of statistics, **49 indicators have been selected** that PMR analysts have identified as key to properly assess the attractiveness of a given industry in relation to digital transformation. Depending on the indicator, these included its level, growth rate, CAGR or share. In order to mitigate distortions in the data resulting from, among other things, the pandemic, we used averages for the last 3-5 years where possible. In addition, to achieve comparability between variables, the figures were standardised.

For each of the industries under consideration, statistical distances were determined within the selected 49 areas between the industry in question and the "benchmark object", i.e. the industry that ranks first for the given indicator. The distances obtained are the components of the final index (subindices). At this stage, for each indicator, the suitable direction of influence (stimulant, destimulant, nominant) was also determined.

The final index represents a so-called "measure of development" calculated on the basis of the weighted Euclidean distance derived from the individual indicators, with weights determined by PMR's analysts.

The resulting index provides reliable, comparable and consistent results, enabling proper inferences about the attractiveness of the industries under study.

Additional information about the



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 2024-2028.

In addition to projections for the market value and its segments, the report also covers forecasts for 2024-2028 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 digital transformation market in Poland?
- Which sector of the economy is the most attractive in terms of potential deployment of new digital solutions?
- How do company representatives from various industries perceive the state of digital transformation in their own enterprises?
- What are the prevailing trends in the digital transformation market?
- What regulations affect the digital transformation market?
- Which digital transformation solutions are the most popular?
- Which industries invest the most in digital transformation?
- What are the global trends in the digital transformation market?
- Which companies sell ICT solutions for each economic sector?
- What are the companies' plans for implementing the next stages of digital transformation?





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