

CYBERSECURITY MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030





Main objective

To provide a comprehensive analysis of the cybersecurity market in Poland and to present mid-term and long-term forecasts for its development.

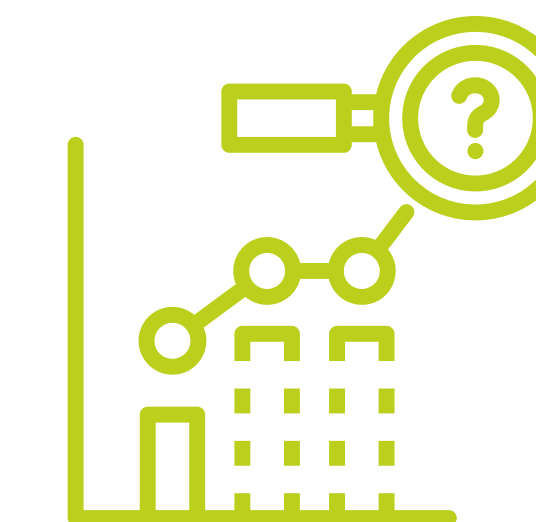
Additional objectives

- to identify the market volume, structure and consolidation level
- to develop forecasts for the market
- to identify the standing of market leaders and analyse the competitive potential of companies operating in the sector
- to analyse the impact of macroeconomic, legal and geopolitical factors on the demand for cybersecurity solutions
- to identify key trends and barriers to market development
- to identify new development prospects arising from increasing digitalisation, the advancement of AI, cloud computing and security
- to analyse the direction of market development in the context of EU regulatory changes and global technological trends



Time span

2015-2024



Forecast horizon

2025-2030



Geographic coverage

Poland

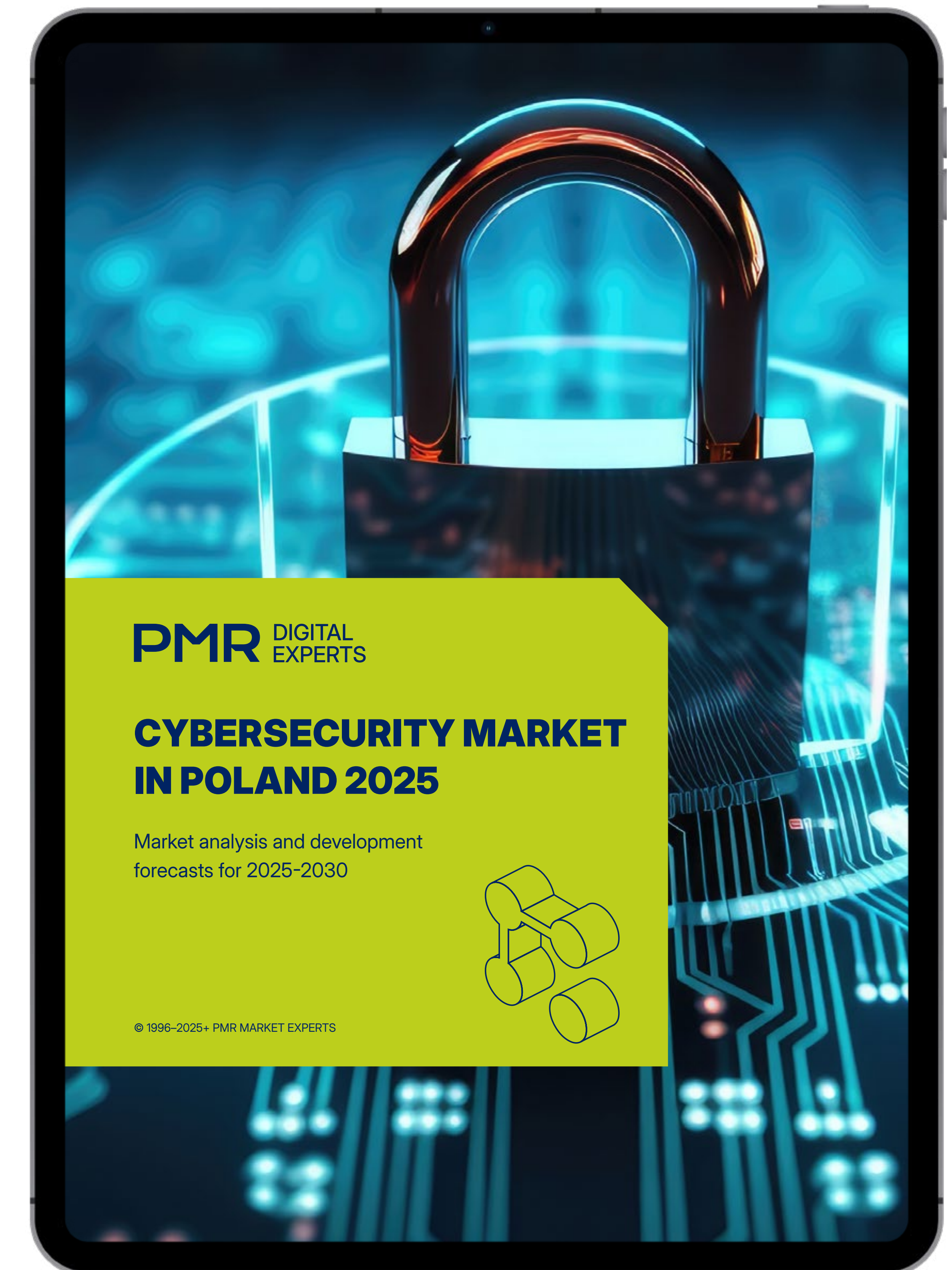


What is included in the report?

- **value and growth rate** of the cybersecurity market in Poland
- **breakdown of the cybersecurity market** in Poland by segment (hardware, software and services) and by individual solutions (e.g. network and system security, endpoint security, consulting, outsourcing)
- **breakdown of the cybersecurity market** in Poland by type of entity and industry
- **companies' spending on cybersecurity** – which types of entities and industries spend the most, how companies' budgets are changing, share of cybersecurity in total IT spending
- **international comparisons** – global spending on cybersecurity vs cybercrime costs, global attack vectors, companies' approach to security budgets, shortage of specialists, role of AI in cybersecurity
- **key market events and developments** – regulatory changes, major contracts, consolidations and acquisitions, introduction of new services and solutions
- macroeconomic, demand-side, supply-side and legal **factors affecting the market**
- **results of a survey** conducted by PMR Market Experts by Hume's on, among other things, which companies in Poland use SOC/SOAR, what their investment plans look like, and who their providers are
- **analysis of the competitive landscape and major players** operating in each segment of the market
- **forecasts up to 2030** for:
 - ↳ cybersecurity market in Poland
 - ↳ main segments of the cybersecurity market and its vertical structure by type of entity and industry
 - ↳ changes in macroeconomic factors

Subject matter

- macroeconomic situation and its impact on the cybersecurity market
- value and growth rate of the cybersecurity market
- breakdown of the cybersecurity market by hardware, services and software
- breakdown of the cybersecurity market by network and system security, endpoint security, consulting, solution implementation and integration, security outsourcing and managed services
- breakdown of cybersecurity spending by type of entity and industry
- cybersecurity trends in the B2B and B2C sectors
- overview of key regulations affecting the cybersecurity market
- key trends identified in the domestic and international markets
- listing of the major players in the cybersecurity market
- profiles of players broken down into distributors/VADs and integrators, integrators and service providers, hardware and software manufacturers, telecommunications operators and data centres
- forecasts for the value of the market and each of its segments





Scope

The report analyses in detail the cybersecurity market in Poland. As part of our analysis, we considered two main groups of cybersecurity products and services:

Breakdown into segments

- hardware
- software
- services

Breakdown into solutions

- network and system security
 - ↳ application protection
 - ↳ data privacy
 - ↳ data protection
 - ↳ infrastructure protection
 - ↳ network security hardware
- endpoint security
 - ↳ access control
 - ↳ endpoint security applications
- consulting, solution implementation and integration
 - ↳ risk management
 - ↳ security services
- security outsourcing and managed security services (MSS)
- cloud security
- security systems for operational technology and industrial automation (OT)
- other



Forecasts

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

The forecasts cover the period 2025-2030.

In addition to projections for the market value and its segments, the report also covers forecasts for 2025-2030 for selected demographic and macroeconomic indicators, including:

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

Accuracy of forecasts in the previous edition of the report

Indicator	Period	MAPE
Value of the cybersecurity market in Poland	2022-2023	3.8%
	2023	2.1%

The forecasts by PMR Market Experts published in the reports are highly accurate – the typical error rate (MAPE) is usually below 3%





10 reasons to invest in the report "Cybersecurity market in Poland 2025"

1 **Comprehensive overview of market value and growth rate**
Value of the cybersecurity market in Poland in 2015-2024 and 5-year forecasts based on PMR models.

2 **Access to accurate econometric forecasts**
5-year forecasts based on ARIMA/VAR models, taking into account GDP, inflation, wages, investments and EU funds.

3 **Complete picture of the user and B2B/B2C client**
Data on the behaviour of Polish companies and consumers: most frequently used solutions, number of incidents, perception of threats, methods of securing passwords and phones.

4 **Understanding current market barriers and opportunities**
The impact of regulations, the shortage of specialists, the rising costs of cyberattacks, and opportunities related to AI, the cloud and digitalisation.

5 **International comparisons and global megatrends**
Comparison of the Polish market with global spending and trends, including AI in cybersecurity, automation, etc.

6 **Assessment of the competitive strength and position**
Profiles of key companies: distributors, integrators, operators, manufacturers, including an analysis of revenues and strengths.

7 **Unique data on company expenditure**
Structure of cybersecurity spending in Poland by company size and industry, including forecasts up to 2030.

8 **Roadmap for the future of cybersecurity**
Identification of segments with the highest growth potential: cybersecurity for OT and industry, cloud security, development of MSS and SOC/SOAR services, and the endpoint security market.

9 **Additional materials - source data in an Excel spreadsheet**
Enable independent data aggregation, analysis and in-house model development.

10 **Proprietary survey and experience**
Combined data sources (primary, secondary), 20+ years of expertise in the market, methodology based on dozens of variables.

What questions does the report provide answers to?

- What is the value of the cybersecurity market in Poland?
- What are the major trends in the cybersecurity market?
- 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 software, hardware, and service cybersecurity market?
- What is the competitive landscape in this market, and what are the strengths of individual providers?

DATASET – together with the report, we provide the most important data in an Excel spreadsheet for independent aggregation.



PMR Market Experts is a brand of market reports prepared by Hume's Institute

At PMR Market Experts, we have been preparing cyclical industry reports for over 20 years. Our core specialisations:

- Digital & ICT
- Retail
- Pharma & Healthcare
- Construction

Our reports are more than just a compilation of facts - they are reliable knowledge based on proven methodology. We combine primary and secondary data, proprietary algorithms and econometric models to provide precise information about the market, its values, growth rates, segments and key players.

We are part of Hume's Institute - a 360° research agency specialising in quantitative and qualitative research, forecasting and market predictions.

PMR Market Experts' **data analysis and verification expertise, unique insights and proven forecasts** provided by Hume's Institute give real insight and advantage to our Clients.

More than 600 clients worldwide have already benefited from our services. **We have analysed more than 5,000 brands, operating in over 50 markets.** We are trusted by major companies – we work with 70% of the prestigious Fortune 500 brands.

20+

years of experience

600+

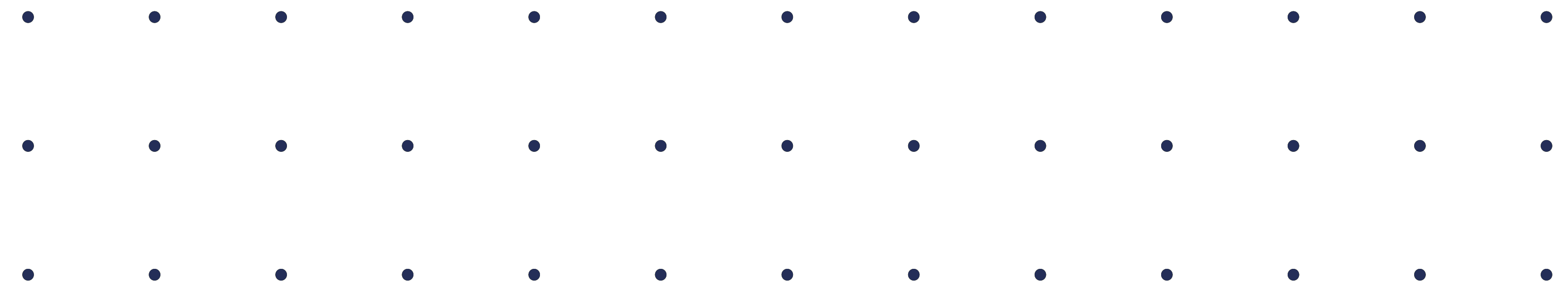
global clients

5,000+

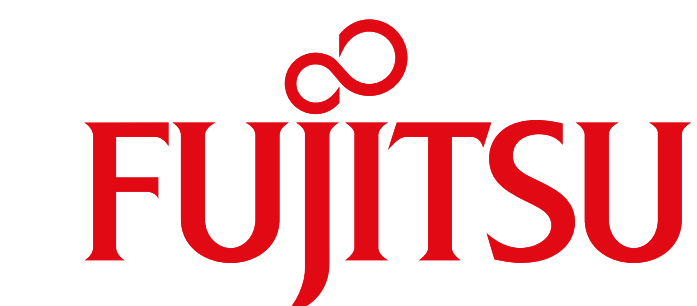
brands studied

50+

analysed countries



Our clients





DIGITAL & ICT

**MARKET ANALYSIS AND 5-YEAR
DEVELOPMENT FORECASTS**

- **AI market in Poland**
 - **Cloud computing market in Poland**
 - **IT equipment and consumer electronics resale market in Poland**
 - **Internet of Things market in Poland**
 - **Data centre market in Poland**
 - **Online services market in Poland**
 - **Gaming market in Poland**
 - **Pay TV and VOD market in Poland**
 - **Integrated telecommunications services market in Poland**
 - **Telecommunications services for business and carrier segment in Poland**
 - **ICT market in Poland**
 - **Mobile internet and value-added services market in Poland**
 - **Cybersecurity market in Poland**
 - **Telecommunications market in Poland**
 - **Digital transformation market in Poland (2024)**
- **Business systems and applications market in Poland**
 - **IT services market in Poland**
 - **Labour market and IT wage structure in Poland**
 - **ESG reporting – challenges and development prospects in Poland**
 - **Smart home market in Poland**
 - **Wearables market in Poland**

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