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Poland Information Technology Report Q1 2016

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Abstracts

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BMI View: Poland's IT market slowed in 2015 as a result of a downturn in the hardware segment, where zloty depreciation and downturns in the product cycle resulted in a contraction in spending.

The mediumterm outlook is much brighter than 2016 and we consider Poland to be one of the more attractive IT markets in the region as it develops economically including an expansion of the middle class.

This will occur alongside improvements to supporting infrastructure such as network reach and capacity which will have positive spillover effects, particularly for the software and services segments in product categories such as cloud computing and Internet of Things solutions.

We forecast IT market spending will grow at a CAGR of 6.0% over 2015-2019 in Poland.

Latest Updates & Industry Developments

Computer Hardware Sales: PLN12.2bn in 2016 to PLN13.6bn in 2019. After a deceleration in 2015 resulting from product cycles and zloty depreciation, we expect the market to return to growth from 2016.

Software Sales: PLN6.0bn in 2016 to PLN7.3bn in 2019. Cloud software availability is deepening the market among SMEs, while we believe there are also opportunities in more complex deployments for large enterprises.

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IT Services Sales: PLN13.8bn in 2016 to PLN17.8bn in 2019. Wider adoption of cloud computing and Internet of Things solutions will underpin IT services outperformance over the medium term.

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