

Poland Cybersecurity - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Poland Cybersecurity Market size is estimated at USD 1.52 billion in 2024, and is expected to reach USD 2.02 billion by 2029, growing at a CAGR of 5.85% during the forecast period (2024-2029).

The Cybersecurity Strategy of the Republic of Poland for 2019-2024 supplanted the National Framework laid out for 2017-2022. It considered the need to enable the Armed Forces of the Republic of Poland to conduct military operations in the event of cyber warfare requiring defensive operations.

Key Highlights

- The Polish government plans to improve the structure of the Armed Forces of the Republic by establishing and strengthening establishments tasked with conducting tasks in cyberspace, which can identify, prevent and combat cyber threats. The Ministry of National Defense is currently working towards developing innovative methods and tools to ensure operational effectiveness in this domain.
- Also, in 2022, Poland raised its nationwide cybersecurity terror threat in the wake of a cyberattack on Ukraine, adding that the new alert level was preventative. The introduction of this alert level means that public administration will be obliged to conduct increased monitoring of the security of ICT systems. It is due to a possible security breach of electronic communications.
- In Poland, very few professionals are willing to work in the public sector due to the significantly higher wages offered in the private sector. To address this, a Cybersecurity Fund was established in December 2021. The fund aims to raise the salaries of cybersecurity professionals in major public institutions such as the Polish Prime Minister's Office and intelligence services, thus driving the demand for the market.
- In February 2022 Poland's defense minister appointed an army general to officially head a new Cyber Defense Force to launch the unit's operation. In 2021, Canadian experts determined that a Polish senator, Polish lawyer, and a Polish prosecutor, all three

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critics of Poland's ruling Law and Justice party, were hacked with NSO's Pegasus spyware.

- However, no specific regulations are enforced in Poland concerning cybercrimes committed regarding intellectual property. Computer-related crimes committed against intellectual property rights are punishable under the same conditions as other crimes committed against property rights. Moreover, the country also dropped in the cybersecurity rankings by Check Point Software.
- Due to the ongoing COVID-19 outbreak, Poland is implementing precautionary measures. With schools closed and communities asked to stay home, several organizations have found ways to enable their employees to work from home. Hence, this has increased the adoption of cybersecurity solutions across the country.

Poland Cybersecurity Market Trends

Cloud Security Segment Drives the Market Growth

- The use of cloud-based solutions in Poland is below the European average. However, the introduction of cloud computing solutions has been a trend in the Polish market for quite some time, especially for large companies (including financial institutions). It is expected that the trend will continue and grow in the future, considering the opening of the Google Cloud region in Poland in 2021, as well as the planned opening of Azure, Microsoft, and AWS regions (local zones) in Poland in 2022.
- Cloud computing has transformed how businesses use, share, and store data, applications, and workloads. However, it also brought many new security threats and challenges. Exposure is further increased when large amounts of data are sent to the cloud and public cloud services.
- Currently, Poland is at the forefront of cloud adoption, augmented by the end-user drive for digitalization. Due to the growing demand for content, edge services, and last-mile connectivity for transport-led data volumes, the interconnection bandwidth capacity has been increasing.
- The Polish Prime Minister's Office reported a rising number of DDoS attacks since 2021 against Polish institutions and domestic entities, which may cause difficulties accessing e-services.
- Several global IT players are present in Poland, and there are currently very few cybersecurity start-ups. The National Framework Policy states that the Polish government aims to invest in developing industrial and technological resources for cybersecurity by creating the conditions needed for developing enterprises, scientific research centers, and start-ups in cybersecurity amid the growing demand for cloud options.

BFSI holds a significant highest market share

- BFSI is one of the most important sectors in the country for cyberattacks, especially during the Ukraine-Russia conflict. Since Poland has been supporting Ukraine since the beginning, it could lead to multiple cyberattacks on the Polish banking sector from Russia to cripple its economy.
- To battle this, the country's defense ministry appointed a new force in February 2022. This force is expected to protect Poland's armed forces and other segments from exterior attacks.
- Further, the growing BFSI sector also demands more data center construction in the country. Many data center companies are expanding their presence across the country by expanding their data center locations. For instance, in June 2022, Vantage Data Centers launched new data center campuses in Poland. The Warsaw data center is the company's first facility of many more to come in Poland.
- The growing number of online and card transactions in the country is also driving the demand for cybersecurity services in the BFSI sector in the country. According to a study by the National Bank of Poland, the country surpassed 40 million card payments in 2021.

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- More recently, a total of 43 million card payments were executed via the internet in Poland. The numbers are expected to rise in the future, further increasing the demand for the market in the studied segment.

Poland Cybersecurity Industry Overview

Poland cybersecurity market is moderately fragmented. Players in the market adopt strategic initiatives such as mergers and acquisitions, partnerships, and new product offerings due to increasing awareness regarding mobility security among enterprises.

- March 2021 - IBM Security announced services designed to manage cloud security strategy, policies, and controls across hybrid cloud environments. The expanded suite of IBM Security Services for Cloud is designed to assist companies in adopting a consistent security strategy across their hybrid cloud environments. Also, the services leverage AI and automation to help identify and prioritize risks.

- March 2021 - Check Point Software partnered with SimilarWeb to increase consumer security awareness. The collaboration enables Check Point and SimilarWeb to provide proactive detection and enriched threat intelligence assessment, assisting in the prevention of phishing attacks.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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