



UNLOCKING POLAND'S AI POTENTIAL 2026

The next wave of AI is here – Poland must act to harness its impact

Poland continues to establish itself as one of Europe's fastest-moving AI markets. Adoption continues to rise rapidly, with more firms integrating AI into their operations, prioritising it strategically, and reporting early gains in productivity, efficiency, and innovation. Poland's trajectory is strong: AI adoption has reached **48%** of Polish businesses, up from **34%** [last year](#) – a **41%** year-on-year increase, the second fastest in Europe – while cloud adoption has climbed to **61%**, up from **44%**. These trends reflect not only growing uptake, but a broader shift toward digital-first business models and a strong appetite to harness new technologies for growth. However, the next phase of AI will not be defined by adoption alone.

A new wave of AI is now taking shape – one that moves toward more advanced, autonomous, and integrated systems – and is reshaping what is possible. Technologies such as agentic AI, advanced machine learning, and AI-driven automation are beginning to fundamentally reshape how businesses operate. These systems can plan, reason, and act across complex workflows, enabling companies not just to optimise existing processes, but to redesign them entirely, create new products and services, and unlock new sources of growth.

At the same time, innovation timelines are rapidly compressing. As AI capabilities advance, the speed at which businesses can develop, test, and deploy new products and services is accelerating significantly. This is reshaping competitive dynamics: firms are expected to move faster from idea to execution, iterate more quickly, and respond in real time to changing market conditions. These productivity gains and shorter innovation cycles are critical in driving growth, enabling businesses to bring new offerings to market more rapidly, and enhancing their ability to compete. They also have wider societal implications, supporting the development of new solutions that can improve quality of life, particularly in areas that citizens prioritise for digital transformation, including healthcare, education, and energy.

This shift marks a turning point. The real economic value of AI will increasingly be captured not by those who simply use it, but by those who deploy it at scale in advanced, transformative ways.

While many Polish businesses have begun adopting AI, only a small share have moved into advanced use cases, where AI is embedded into core systems, combined across multiple functions, or used to drive end-to-end transformation. As next-generation AI technologies compress innovation cycles and lower the barriers to disruption, this gap between basic adoption and advanced deployment is becoming more consequential.

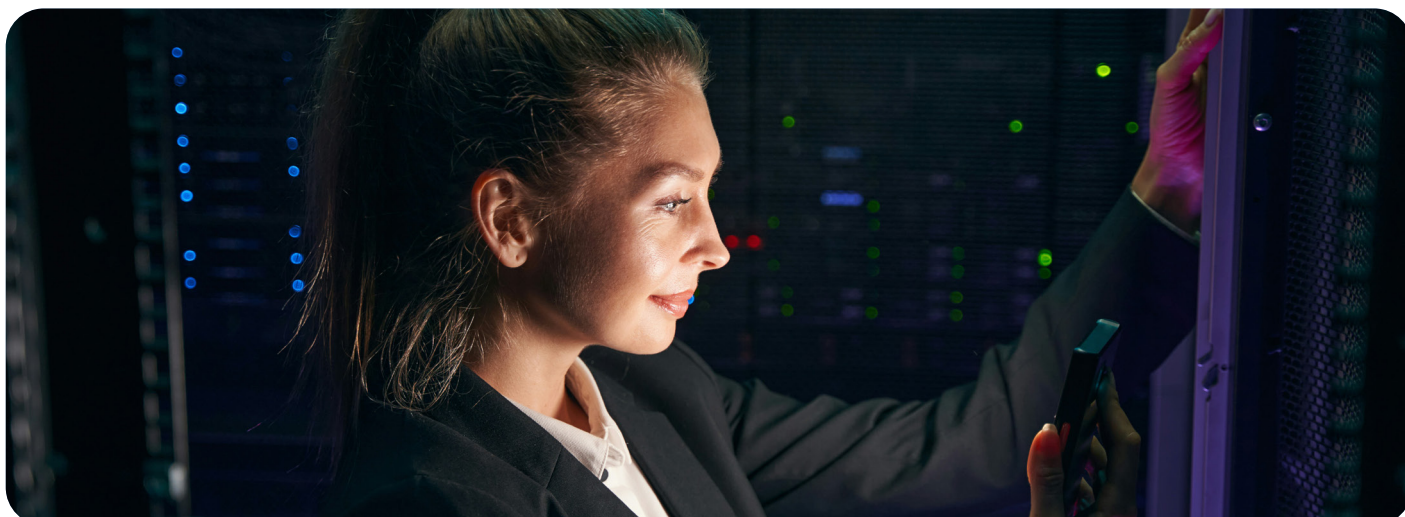
Poland has built strong momentum in AI adoption, but capturing its full economic value will depend on how quickly businesses move into this next phase. Without faster progress toward advanced and next-generation AI, and without addressing key barriers such as skills shortages, financing constraints, and regulatory complexity, Poland risks a widening divide between firms that lead and those that fall behind.

The challenge now is not whether Poland adopts AI, but whether it can harness the next wave of AI to drive real business value: accelerating innovation, enabling new business models, and strengthening long-term competitiveness in an increasingly AI-driven global economy.

This report draws on a nationally representative survey of 1,000 Polish businesses and 1,000 Polish citizens to assess the state of AI adoption, its economic impact, and the barriers to further progress. It explores how businesses are using AI today, their readiness for next-generation technologies, and the challenges they face in scaling adoption. It also captures public attitudes toward digital transformation and investment priorities, providing a holistic view of how AI is reshaping Poland's economy and society, and where action is needed to ensure its benefits are widely shared.

Key findings at a glance

- AI adoption in Poland continues to increase rapidly, with **48%** of Polish businesses now having adopted AI, up from **34%** [last year](#). This represents a **41%** year-on-year growth rate – the second fastest year-on-year growth rate in Europe.
- However, only **16%** of Poland's AI-adopting businesses have adopted AI's most advanced use cases – slightly lower than the European average of **22%**.
- **47%** of Polish SMEs report adopting AI technologies overall, with **15%** using advanced AI use cases and **32%** using basic AI tools.
- Startups lead AI adoption – **72%** have adopted AI, and of these, **41%** are at the most advanced stage.
- AI adoption in financial services stands at **58%** – a leading industry in Poland – compared to other important industries in Poland such as telecommunications (**52%**) and energy (**43%**).
- Cloud adoption is similarly strong: **61%** of businesses have adopted cloud technologies, up from **44%** last year, representing **39%** year-on-year growth.
- AI is now a strategic priority for most businesses: **69%** of businesses say AI adoption is a top or high priority, while **72%** say AI plays a critical or important role in their overall business strategy.
- **74%** of AI adopters say that their timeline for innovation has accelerated over the past two years, rising to **92%** of startups. AI is the number one driver of these changes (**44%**).
- Industries leading in harnessing advanced AI adoption include financial services (**26%**), telecommunications (**23%**), and technology and IT services (**21%**), reflecting higher levels of digital maturity and investment in data-driven technologies.





A growing digital divide: Many businesses are not using advanced AI tools

While adoption is accelerating, celebrating headline adoption figures alone risks masking a more structural shift underway in Poland's economy. Only **16%** of AI-adopting Polish businesses are harnessing AI's most advanced use cases for transformation, where they are deploying advanced AI systems, combining multiple models, building custom solutions, or integrating agentic and autonomous capabilities across their operations. This is up from **13%** last year, but still below the European average of **22%**.

At the current pace of progress, it would take around five years¹ for even half of Poland's AI-adopting businesses to reach this level of advanced use. This matters because it is at this stage that the greatest productivity gains, competitive advantages, and innovation spillovers are realised. Transformational AI is not simply about improving efficiency in existing workflows; it enables entirely new products and services, new routes to market, and fundamentally different operating models.

There is evidence of a divide between businesses adopting advanced AI use cases and the rest of AI adopters. While **28%** of AI-adopting businesses² report having launched a new AI-driven product or service in the last year, the majority continue to use AI primarily to optimise existing processes rather than to create new sources of growth. This suggests that, for many firms, AI adoption has yet to translate into business model innovation or market differentiation.

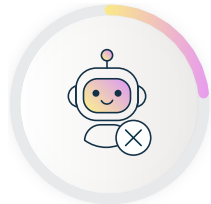
For businesses across Poland, progress toward integrating AI's most advanced use cases – and with it, transformative innovation – is therefore not advancing as quickly as it could. This represents a significant pool of untapped economic potential. As next-generation AI technologies continue to emerge and compress innovation timelines, the cost of delay is rising. Businesses that do not move beyond basic adoption risk being locked into lower productivity trajectories and reduced competitiveness, both domestically and internationally.

This poses a core competitiveness challenge. As innovation cycles compress, the ability to deploy advanced AI safely and at scale becomes a key differentiator. In practice, this means moving beyond isolated pilots toward AI that is embedded into core systems, supported by high-quality data, strong governance, and AI-ready talent.

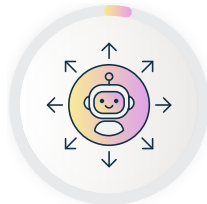
Businesses say they aren't yet prepared for the next wave of AI

Next-generation AI technologies – such as agentic AI, physical AI, and advanced robotics – will play a defining role in the next phase of AI-driven innovation. These technologies move beyond traditional AI tools by enabling systems to plan, reason, and take actions autonomously across complex tasks. As these capabilities mature, they have the potential to reshape industries, accelerate innovation cycles, and unlock entirely new business models.

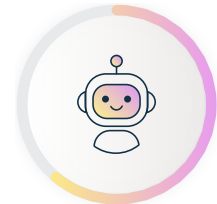
Awareness of agentic AI is increasing, but the gap between familiarity and deployment remains significant:



23% of Polish businesses say they have heard of agentic AI



Of those familiar, only **3%** report fully deploying agentic AI, while **11%** report experimenting or piloting it



When the technology is explained, **61%** say they have plans to use agentic AI or are considering it, while **16%** say they have no plans to adopt it

Among those that have adopted agentic AI, benefits are already clear: **45%** report faster decision-making and execution, **34%** report increased operational efficiency or productivity, and **24%** report improved scalability of operations.

The majority of businesses do not feel ready to adopt these emerging technologies, but startups emerge as a bright spot. Only **21%** of businesses say they feel fully or very ready to adopt next-generation AI technologies, compared to **79%** of startups that say they are ready.

For those who report being unprepared for next-generation AI tools, **40%** cite skills shortages as a barrier to adopting next-generation AI technologies, and **35%** cite insufficient internal financial resources.

These findings point to a clear readiness gap as the next wave of AI approaches. While awareness of emerging technologies such as agentic AI is growing, most businesses remain at an early stage of adoption and lack the capabilities required to deploy them effectively at scale. Without stronger foundations in skills, investment, and organisational preparedness, many firms risk being left behind as these technologies move from experimentation to mainstream use. Closing this readiness gap will be critical to ensuring that businesses can fully capture the benefits of next-generation AI and remain competitive in an increasingly fast-moving innovation landscape.

Cybersecurity is a key consideration in Poland and businesses are using AI to tackle key threats:

Businesses rank cybersecurity and resilience highly as a priority for public investment in the tech and innovation space, with over a third (**37%**) viewing cybersecurity and digital resilience as a key area for investment. Spending on cybersecurity products and services in Poland increased by around **25%** in 2025, reaching [approximately 1 billion USD](#).

Over the past year, businesses most commonly report improved internal processes using AI (**52%**) and enhanced data analysis and decision-making capabilities using AI (**47%**), with **28%** launching new AI-driven products or services and **31%** enhancing cybersecurity through AI.

Case study: T-Mobile Poland: Turning conversations into connections with AWS



Most organisations today don't struggle with a lack of data - they struggle with using it. As much as **70–80%** of available data never makes it into day-to-day decisions, leaving customers feeling unheard: "You don't understand what I need" or "I called three times and was redirected every time without a solution". T-Mobile Poland, serving more than 13 million customers, knew this reality well. The real challenge wasn't a lack of information, but the inability to activate the right insights at the moment they mattered most.

As a result, T-Mobile Polska redesigned the way data empowers people to make business decisions, leveraging modern technological solutions, including those offered by AWS. The result was two AI-powered solutions built on a shared principle: technology should serve people, not the other way around.

The first solution, ZapytAI, is an AI assistant seamlessly embedded in consultant's daily work, delivering fast, context-aware support. Powered by a Retrieval-Augmented Generation approach and Amazon Bedrock, it provides relevant insights, contexts, and clear next-best actions in real time. Complementing this, AI-powered Voice Analytics turns call recordings into meaningful business insights. Using Amazon Transcribe and Amazon SageMaker, it helps organisations move from issue handling to a more proactive, customer-centric understanding.

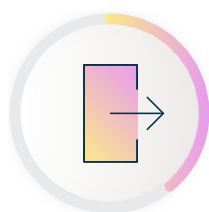
The impact is measurable and, above all, human. ZapytAI reduced time spent searching for information by approximately **40%** and improved answer accuracy by 20 percentage points. Voice Analytics has contributed to reduced churn and increased cross-sell opportunities. Beyond the numbers, however, the change is structural: issues that once happened are now resolved at the root, and employees who once searched for answers are now supported in real time.

T-Mobile Polska has evolved from simply listening to customers to truly understanding them, building a strong foundation for real-time, AI-driven experiences that anticipate customer needs before they even emerge.

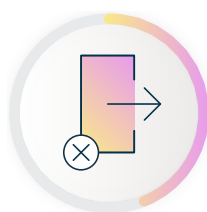
Poland risks losing its leaders

Even as startups lead the charge on not just adopting, but integrating AI, this widening gap is now beginning to reshape Poland's ability to retain these advanced innovators. The high-potential AI startups that Poland incubates are growing fast, and as they do so, they are running quickly into constraints when growing their business and scaling internationally. This raises a question about whether these Poland-founded startups can scale at home, or whether they will be forced to look abroad for better growth conditions and incentives. The priority is therefore to turn Poland into an environment where scaling is as straightforward as starting.

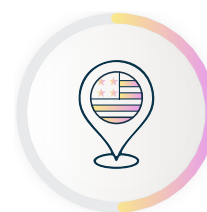
A substantial share of startups indicate openness to relocating to secure faster growth.



39% of Polish startups say they would consider leaving Europe to scale their business



44% say they would not consider leaving



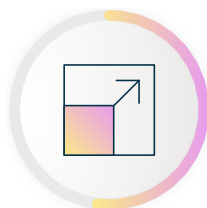
Of those who said they would consider leaving Europe, by far the most commonly cited destination is the United States (**49%**).

When asked why they would consider leaving Europe, startups consistently point to their ability to grow and scale.

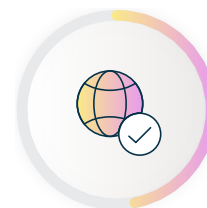
The top reasons are:



1. Greater availability of funding or investment, cited by **58%**



2. Faster ability to scale internationally, cited by **52%**



3. Better access to global markets, cited by **47%**

These findings reinforce a central theme of this year's report: in an accelerated innovation cycle, the global race is increasingly shaped by speed – and founders will follow the pathways that reduce friction and shorten time-to-market.

However, founder flight is not inevitable. Startups are clear about what would make Europe a more attractive environment for scaling. Among startups that say they would consider relocating, the following factors would encourage them to stay:

1. Greater availability of venture and growth funding (**56%**)

56%

2. Faster ability to scale within Europe (**54%**)

54%

3. Clearer and more proportionate AI regulation (**51%**)

51%

4. A more predictable and stable tech policy environment (**49%**)

49%

5. Better access to advanced technology and infrastructure, including cloud and data centres (**46%**)

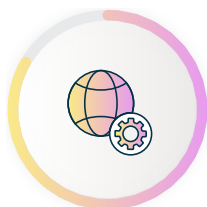
33%

These levers align with a broader competitiveness agenda: making sure Poland is the best place to scale a business, as well as to start one.



Businesses value choice and flexibility in the AI and cloud landscape

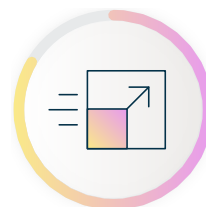
Polish businesses consistently emphasise the importance of access to global technology providers, particularly as they seek to innovate and scale beyond domestic markets.



83% of businesses say access to global technology companies is important for their AI adoption.



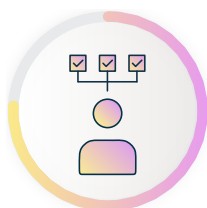
81% say it is important for innovation.



84% say it is important for scaling quickly.

Businesses report that, when selecting AI tools and providers, their priorities are speed, scalability, resilience, and security, and the ability to make the right technology choices based on customer needs – regardless of where the provider of the tools is based.

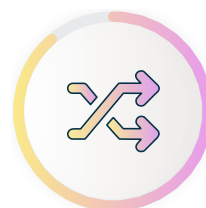
Rather than relying exclusively on domestic providers, many organisations operate across mixed ecosystems, selecting technology partners based on capability and performance. This reflects a pragmatic approach to technology adoption, where businesses prioritise access to the most effective solutions available, regardless of where they are headquartered or where infrastructure is located.



76% say they have adequate choice to select and switch between different providers of AI technologies.



71% say this ability to choose and switch is extremely or very important to supporting AI adoption.



89% report using a mix of providers from different regions, rather than working primarily with providers from their home country.

For businesses that use providers outside their home country, the rationale is clear and consistent. The most commonly cited reasons include access to a wider range of features or product offerings (**56%**), better scalability, performance, or integration options (**52%**), and perceived technological leadership or more advanced capabilities (**48%**). In addition, **45%** point to easier deployment across multiple countries, reflecting the importance of interoperability and global reach for firms operating in international markets.

When considering where to direct public investment, businesses are focused on key priorities other than AI infrastructure. The most frequently ranked as the highest priorities for public investment over the next 5-10 years are skills, education, and workforce training (**51%**), followed by healthcare and life sciences (**47%**) and energy security and green transition (**43%**), with defence and security (**38%**) also identified as a key priority.

Similarly, among citizens the areas most frequently ranked as the highest priorities for public investment over the next 5-10 years are healthcare and life sciences (**58%**), followed by skills, education, and workforce training (**49%**) and transport and physical infrastructure (**44%**), with defence and security (**41%**) also identified as a key priority.

Data also suggests a limited appetite for sovereignty strategies that increase cost without clear competitiveness outcomes. While public investment in European infrastructure can play an important role, particularly in building research, skills, and strategic capacity, businesses appear cautious about investments that would raise costs without delivering greater capability: Only **9%** would support greater public investment in Europe-based AI and cloud infrastructure if it results in higher costs for their business.

AI is rapidly transforming how we use technology to address some of the world's biggest challenges, from health care to climate change. As business and citizen use of AI scales, research commissioned by AWS and conducted by Accenture shows that businesses can minimise their environmental footprint by moving IT workloads from on-premises infrastructure to AWS data centres around the globe. The report estimates that AWS's [infrastructure is up to 4.1 times](#) more efficient than on-premises.

Case study: PayPo: How a Polish fintech startup scaled from a single server to billions in transactions - with AWS



Poland's startup ecosystem is producing companies that don't just grow - they reinvent themselves continuously while the business keeps running. PayPo is one of them.

It started in 2016 under a different name - NaKreske.pl, loosely translated as "on a tab" - with three applications, a single server, and fewer than ten people. What the founding team lacked in scale, they made up for in strategic clarity: from day one, the decision was made to build cloud-native system and very soon a decision on strategic partnership with AWS followed. Not because it was fashionable, but because they understood what was coming - explosive growth, strict financial regulation, and the need to scale without limits.

That conviction proved well-founded. As digital payments accelerated through COVID-19 and Black Friday-alike traffic became an everyday baseline, PayPo evolved continuously. The original architecture was broken into tens of microservices, databases were migrated to Amazon Aurora for automatic scaling, and as background processes multiplied - from identity verification to anti-money laundering monitoring - the platform moved to a fully event-driven architecture. The business kept running throughout. Not a single major redesign required a pause.

This is precisely the challenge our study identifies: Polish startups are fast movers, but scaling without the right infrastructure raises the cost of growth. PayPo's story shows what's possible when the foundation is right from the start. Operating in one of Europe's most strictly regulated sectors, AWS became more than infrastructure - it became a compliance partner. When new European financial regulations arrived, PayPo was ready.

The results speak to a decade of deliberate evolution. In 2025, PayPo processed 22.5 million transactions and managed a projected GMV of 6.6 billion PLN, with **99.95%+** availability. The team grew from fewer than ten to approximately 300 employees. In Q4 2024, the launch of a digital card with Visa unlocked the entire offline BNPL market - with 2.8 million customers projected by 2026.

PayPo didn't just migrate to the cloud. It evolved with it - and built the resilience to grow into whatever comes next

Tackling barriers to deeper AI adoption

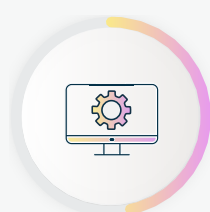
1. Access to a skilled workforce and finance pathways

Skills shortages remain a major structural constraint on the adoption and expansion of AI. Deploying AI solutions at scale often requires sustained investment not only in infrastructure and data systems, but also in talent and organisational capabilities. However, many businesses report that they lack the internal resources required to move from experimentation to full deployment.

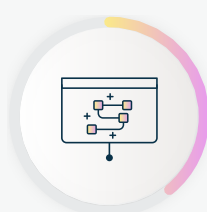
- **46%** of Polish businesses cite shortages of AI and digital skills as a barrier to adopting or expanding AI
- **41%** cite insufficient internal workforce capacity

These challenges are reflected in businesses' self-assessment of capability. Only a minority report having a strong AI skillset today, while most say their skills need improvement:

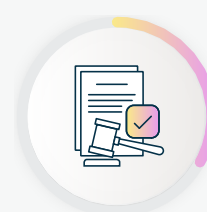
- Only **18%** say they currently have a strong AI skillset.
- **56%** say they have some AI skills but need improvement.
- **26%** say they are only just beginning to develop AI skills.
- **82%** expect AI skills to be important in their industry over the next five years.
- The technical roles businesses expect to become more important in the next five years are:



Software developer (**47%**)



Solutions architect (**39%**)



Data governance or privacy officer (**33%**)

- Skills shortages are reported most frequently in the technology and IT services industry (**54%**), followed by financial services (**49%**) and healthcare (**47%**).
- Overall, the AI skills barrier is cited by **45%** of SMEs, indicating that limited access to technical expertise continues to slow the deployment and scaling of AI solutions across the Polish SME ecosystem.

Without stronger access to AI and digital skills, many businesses will remain stuck at the experimentation stage. Closing this gap is essential not only for increasing adoption but for enabling firms to deploy AI at scale and translate it into productivity and growth.

Finance remains the second structural constraint. Many businesses report that they lack dedicated AI budgets, and those that do often allocate only a small share of IT spend toward AI – limiting their ability to move beyond pilots and narrow use cases:

- **37%** cite insufficient internal financial resources as a barrier.
- **29%** cite an unclear ROI or business case.

This suggests that, alongside funding constraints, many businesses may lack the tools, frameworks, or internal expertise needed to assess and articulate the return on AI investments, particularly for more advanced or longer-term use cases.

- **43%** say they do not have a dedicated AI budget.
- **81%** expect AI to take a larger share of IT spend over the next three years, predicting it to rise to **27%** of their total IT budget.

Without sufficient financial capacity, businesses risk limiting AI to small-scale pilots rather than embedding it across operations. Unlocking access to funding and improving confidence in AI's return on investment will be critical to moving from adoption to transformation.

2. Navigating fragmentation when scaling

Polish businesses report that even where adoption is advancing, scaling AI internationally introduces legal complexity, higher compliance costs, and operational friction, particularly for firms operating across multiple markets and regulatory environments.

This scaling friction is compounded by the broader compliance burden Polish businesses already face as they navigate regulatory fragmentation:

- Polish businesses estimate that **40%** of their total tech spend goes toward compliance with national and international regulations, compared to **38%** last year.
- When asked what makes up this **40%**, **38%** of Polish businesses cite relationship management with supervisors and responsible government authorities, followed by legal consultations or external advisory services (**36%**), and employee training on compliance requirements (**35%**).
- **79%** say compliance costs have increased over the past three years, and **82%** expect these costs to rise further over the next three.

As businesses scale across borders, regulatory complexity risks becoming a brake on innovation. Reducing fragmentation and improving clarity will be key to enabling firms to deploy AI efficiently and compete at scale in a global market.

3. Innovation without incentives

Businesses report that limited external support, weak demand signals, and complex procurement processes make it harder to justify the risk and investment required to scale AI across operations or develop new AI-driven products.

- **59%** of Polish companies say government support - such as grants or tax incentives - is important to their decision to adopt AI.
- **34%** say a lack of incentives or external support discourages AI investment.
- **31%** say other business priorities take precedence over AI investment.

Public sector demand can help accelerate diffusion, but procurement remains a consistent barrier:



35% cite complex or slow public procurement processes as a challenge to scaling AI solutions.



46% say opportunities to sell to the government are crucial or very important in their decision to adopt AI.

Without clear incentives, businesses may delay or deprioritise AI investment. Strengthening public sector demand and simplifying procurement processes can play a crucial role in accelerating adoption and supporting market growth.

Taken together, these barriers highlight a common challenge: while interest in AI is high, the conditions required for widespread, transformative adoption are not yet fully in place. Addressing skills, finance, regulatory, and demand constraints in parallel will be essential to ensure that AI adoption in Poland is not only widespread, but deep, scalable, and capable of driving long-term competitiveness.

Recommendations: Unlocking Poland's AI future

1. Scale on Poland's own strengths

Poland already has many of the foundations required to compete in an accelerated AI era. Businesses report having the ability to select tools based on performance, scalability, and customer needs – key to their AI adoption and innovation. It allows firms not only to access leading-edge AI capabilities but also to adapt rapidly as technologies evolve. Together with a growing digital base and an increasingly innovation-oriented business environment, this creates a solid platform for Poland to move from adoption toward transformation.

When asked what matters most for supporting growth in their business and industry, Polish businesses point to:

- Access to the most advanced AI tools and services (**62%**)
- Private investment and venture capital (**58%**)
- Skilled AI talent (**55%**)

Businesses also highlight the importance of demand-side opportunities, particularly through the public sector. **46%** say that opportunities to sell to the government are crucial or very important in their decision to adopt AI, underlining the role that public procurement can play in supporting adoption and scaling.

Confidence in the broader European ecosystem also remains relatively strong. **71%** of businesses agree that Europe has the infrastructure and ecosystem needed to scale globally, while **57%** rate Europe as highly or somewhat competitive as a global hub for AI and innovation.

The challenge now is not to build these foundations from scratch, but to scale what already works. This means ensuring that access to advanced tools, cloud infrastructure, talent, and capital is not limited to a small group of leading firms, but is diffused across the wider economy. Accelerating this diffusion will be key to ensuring that innovation is not concentrated in isolated pockets, but becomes a broad-based driver of productivity, competitiveness, and growth across Poland.

2. Accelerate digital transformation across industries

Businesses consistently emphasise that sustained digital transformation is critical to supporting growth and competitiveness across industries. Many point to the importance of a virtuous cycle of investment and innovation, underpinned by modernised business processes, the commercial application of new technologies, and continued investment in R&D. Firms highlight that strengthening these areas would enable them to move beyond incremental improvements and fully capture the value of digital and AI-driven transformation.

There is also a strong recognition among businesses that access to a skilled workforce is a central enabler of this process. Together, these factors are seen as essential to helping Polish companies scale innovation, remain globally competitive, and build on the dynamism that has characterised the country's innovation landscape.

3. Establish the Polish government as a leading adopter of digital technology

Businesses consistently highlight the importance of a digitally advanced public sector in supporting wider AI adoption and innovation. Many see government leadership in digital transformation as a key signal that can build confidence, create demand, and accelerate uptake across the economy. In particular, firms point to areas such as healthcare, education, and public services as high-impact domains where the use of AI could both improve outcomes for citizens and demonstrate the practical value of these technologies at scale.

This is reflected in business sentiment: **53%** of Polish businesses say they are more likely to adopt AI when the public sector does. A more digitally enabled public sector is therefore seen not only as a service improvement, but as a catalyst for broader market development – helping to stimulate innovation, create opportunities for businesses, and support the diffusion of AI across the wider economy.

4. Increase access to skills

Poland's businesses consistently report that they are held back from increasing their AI adoption by a lack of digital skills. Governments and businesses must work together to close this skills gap and provide citizens with the digital skills they need to succeed - this includes those already in jobs and the workforce of the future.

The window for AI transformation is narrowing – Poland must act to translate adoption into impact

Poland enters the next phase of AI adoption with clear momentum, but also with a growing need to translate that momentum into deeper and broader-based transformation. Adoption is rising, investment is increasing, and many businesses are already reporting tangible productivity and growth benefits. Yet, progress remains uneven. Advanced AI use is still limited, readiness for next-generation AI technologies is low across much of the business landscape, and too many businesses remain constrained by gaps in skills and finance, while reporting that regulatory fragmentation limits their ability to scale. As innovation cycles compress and AI capabilities continue to evolve, the distinction between basic adoption and transformative use will become increasingly important.

The challenge, therefore, is not simply to increase the number of firms using AI, but to ensure that more businesses are able to deploy it at scale to innovate and disrupt their industry. That will require reducing fragmentation, improving access to skills and funding, supporting businesses as they scale, and ensuring that businesses have the flexibility to choose the technologies that best meet their needs. Without these shifts, AI adoption risks remaining broad but shallow, with the benefits concentrated among a relatively narrow group of firms. With these shifts, Poland will be better placed to ensure that the next wave of AI contributes to productivity, resilience, and innovation across the wider economy.



Appendix

Glossary of Terms:

- **Adopted AI:** Currently consistently use at least one artificial intelligence tool.
- **Startup:** A business founded in the last 2 years which provides a new product/service or innovation and is aiming for rapid growth in terms of employees and turnover.
- **SME:** A small or medium-sized enterprise employing fewer than 250 people.
- **Large enterprise:** A large enterprise (also referred to as a large business or established enterprise) is a business with 500 or more employees, founded 10 years ago or more.
- **Basic AI adoption:** These organisations are using AI primarily for incremental improvements such as efficiency gains and process streamlining rather than for innovation. They rely on publicly available chatbots for routine tasks or purchasing ready-made AI solutions.
- **Advanced AI adoption:** These firms are integrating the most advanced use cases of AI, combining multiple models, developing custom AI solutions, or using agentic and autonomous AI. At this stage, organisations are rapidly innovating with AI and, in turn, disrupting their industry.
- **Next-generation AI technologies:** Emerging AI capabilities such as agentic AI, physical AI, and advanced robotics that extend beyond traditional predictive or generative models.
- **Agentic AI:** AI systems capable of autonomously planning, executing, and optimising tasks or workflows with limited human intervention.
- **Physical AI:** AI embedded directly into physical equipment, machinery, and real-world systems — such as production lines, robots, and vehicles — enabling them to perceive their environment, make real-time decisions, and act autonomously without relying on cloud connectivity.
- **AI readiness:** A measure of how prepared a business is to adopt advanced and next-generation AI technologies, considering skills, infrastructure, governance, and financial capacity.
- **Digital skills gap:** The mismatch between the digital and AI-related skills organisations require and the skills currently available within the workforce.

Methodology

The fieldwork for this study was undertaken by Strand Partners' research team for Amazon Web Services. This research has followed the guidance set forth by the UK Market Research Society and ESOMAR. For the purposes of this study, business leaders are defined as founders, CEOs, or members of the C-suite in organisations.

'Citizens' are nationally representative members of the public based on the latest available census.

For inquiries regarding our methodology, please direct your questions to: polling@strandpartners.com.

In Poland:

- We conducted a survey targeting 1,000 nationally representative members of the public, ensuring representation based on age, gender, and NUTS 1 region.
- Additionally, we surveyed 1,000 business leaders, representative by their business size, sector, and NUTS 1 region.

Sample

Our sampling process used a mix of online panels that are recognised for their validity and reliability. These panels are carefully curated to ensure diverse representation across various demographics. For the business leaders, the panels are selected with a consideration for organisational size, sector, and position within the company. Our objective with the sampling strategy is to achieve an optimal mix that mirrors the actual distribution of our target populations in the respective markets.

Weighting Techniques:

Post-data collection, we applied iterative proportional weight to correct any discrepancies or over-representations in the sample.

Survey:

This study was designed with the objective of delving deep into the digital landscape:

- **Usage Patterns:** This survey gauges the evolving patterns of digital technology usage. We are particularly interested in examining the adoption and implementation levels of technologies, focusing on cloud computing and artificial intelligence.
- **Perceptions and Attitudes:** The survey seeks to unearth the prevailing perceptions and attitudes towards digital technologies, understanding the perceived benefits, challenges, and potential ramifications of both present and emerging tech solutions.
- **Barriers and Opportunities:** The survey scrutinises the predicted challenges and potential avenues that both businesses and individuals anticipate on their digital trajectory. This involves pinpointing challenges, from skill deficits to regulatory complications, and recognising opportunities for growth, innovation, and market development.
- **'Size of the Prize':** The survey shed light on the economic repercussions and growth prospects linked with digital transformation. By elucidating the 'size of the prize', we aspire to stress the importance of digital transformation and foster further investments and technology adoption.

References:

1. Based on year-on-year growth in advanced AI adoption (13% to 16%, ~23% annual growth), this projection estimates the time required for 50% of AI-adopting businesses to reach the advanced stage, assuming the current rate of growth is sustained.
2. This figure refers to all AI-adopting businesses, not only those using advanced AI use cases.