



SAP labour market in Poland.

Analysis and forecasts, 2024-2026.



The dynamic business environment, growing importance of modern technology, and complexity of business processes demand efficient process management from companies. SAP is currently the largest and most widely used ERP system that supports and streamlines these processes. The system is used by 26 industries in 130 countries around the world. According to official data from the Walldorf-based company, it has 400,000 registered customers and 24,000 partners, and its cloud solutions are used by nearly 300 million users. SAP has been present in Poland for nearly 30 years. It is used by approximately 2,000 companies, of which 250 are consulting companies, and the rest use the system to manage their own business processes. More than 120,000 consultants, developers, managers, and key SAP users (“key users”) have SAP competencies.

This report was created to provide the SAP community in Poland with knowledge that will help specialists plan their professional development and companies to develop their employment and talent management policies in this area. It presents the most important data that allows you to predict market changes in the next

3 years and prepare for them.

The SAP labour market is particularly important to us, because for 7 years, we have been building our expertise in this area, supporting the improvement of the quality of business processes of the largest Polish and foreign companies, along with the professional development of the best consultants in Poland. This report would not have been possible without the involvement of the SAP community in Poland, for which we are extremely grateful. Nearly 1,200 SAP experts and managers took part in the research. They answered nearly 70 questions concerning, amongst others, salaries and plans for the future. Nearly 80% of the respondents further provided detailed answers to non-mandatory open-ended questions, which accurately allowed us to understand their work motivation and plans for the near future.

Thank you - this report is for you.

Anna Jaglińska-Prawdzik
Head of Marketing & Market Reports
at Awarson

01. Economic Environment and Competition

+0.2%

GDP growth in Poland in 2023

3.9%

FDI GDP in Poland

+81%

Global IT investment growth

20.7%

of companies have completed migration to S/4HANA

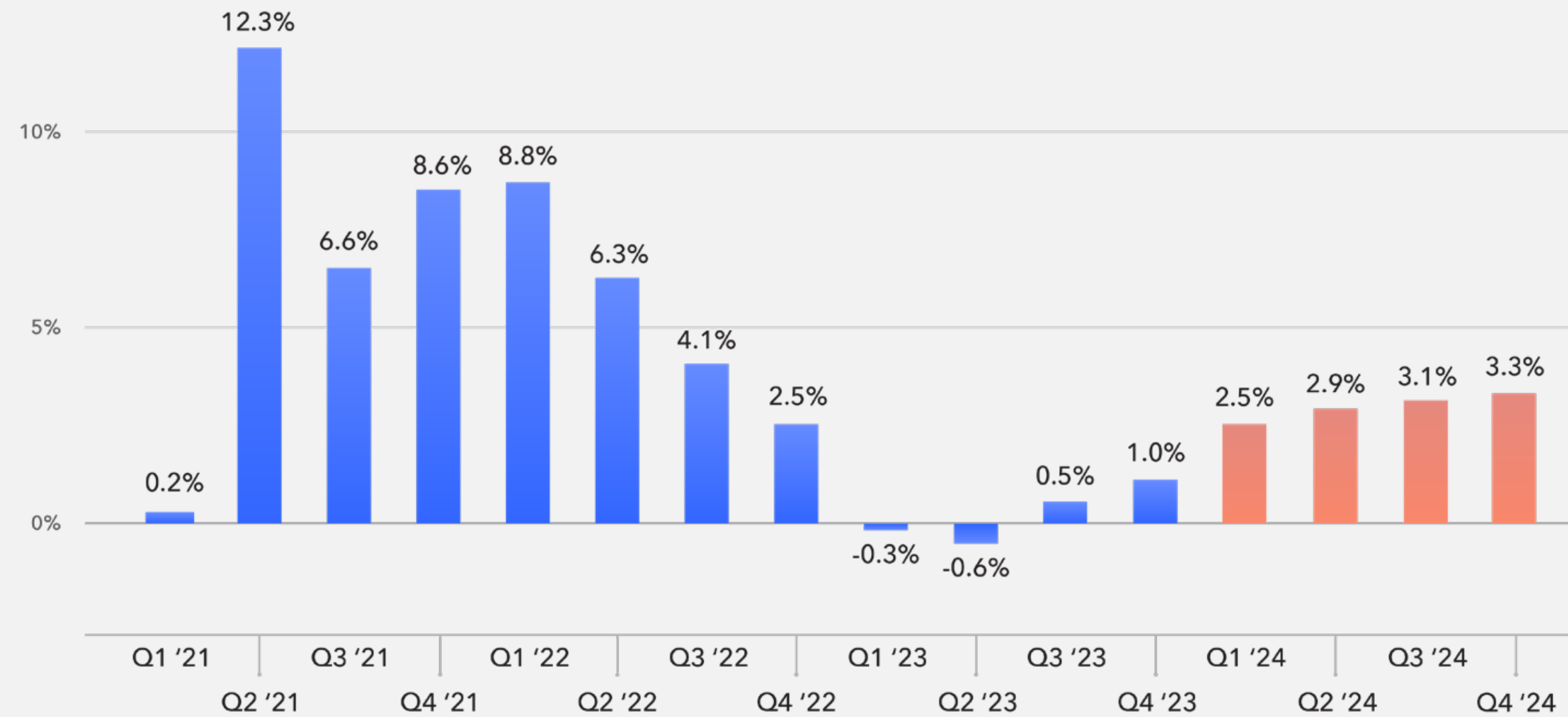
51.7%

of companies have increased SAP specialist employment

72.4%

of companies experience a shortage of SAP specialists

Economic growth in Poland



Source: GUS, Pekao SA (forecasts).

When analysing the SAP labour market in Poland, it is undoubtedly necessary to focus on three forces: economic slowdown, foreign investment, and migration to S/4HANA. How do these forces affect the market? More than half of the companies employing SAP specialists in Poland declare that they increased employment in 2023. Lay-offs affected only 13% of them. Considering the economic environment, including economic growth of 0.2% (the second worst result in 20 years), a technical recession in the first half of the year, and widespread lay-offs in the IT industry as a whole, this is a very good result.

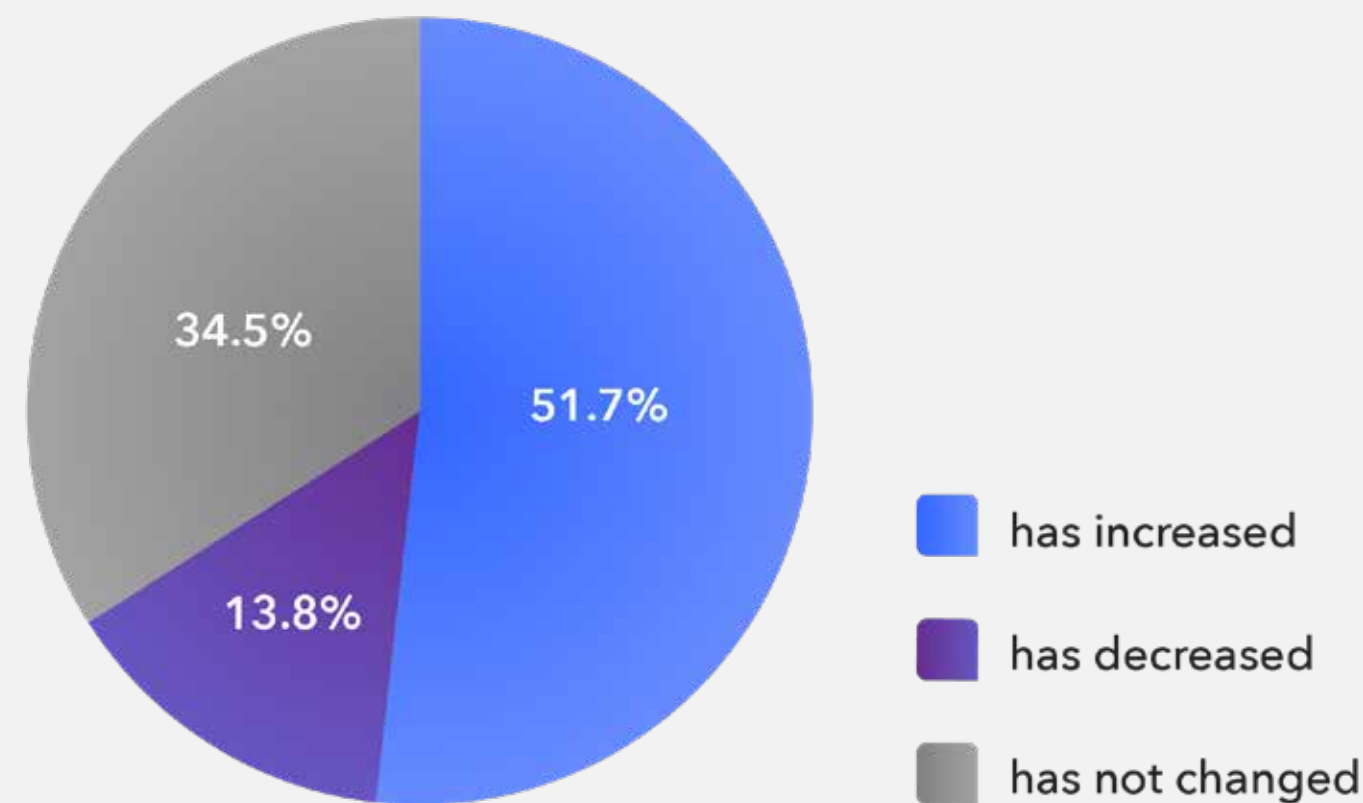
One of the reasons for the relatively good condition of the SAP labour market is the specificity of ERP systems, which must reflect key changes in the economic environment and business decisions of organisations. Certain actions must be taken regardless of whether the economy is growing, stagnating, or slowing down. While some non-priority projects could be put on hold, those needed for the day-to-day operations of the company, cannot. Any takeovers, mergers and improvements, direct foreign investments or changes in regulations required changes in ERP systems.

The second important factor stabilising the SAP labour market during the economic slowdown, is the migration of the system from version R/3 and ECC 6.0 to S/4HANA. The current support expiration date for old versions is 2027. Whilst many experts expect the final deadline to be postponed again, it undoubtedly motivates many companies to transform.

20% of companies have already completed the migration. Considering

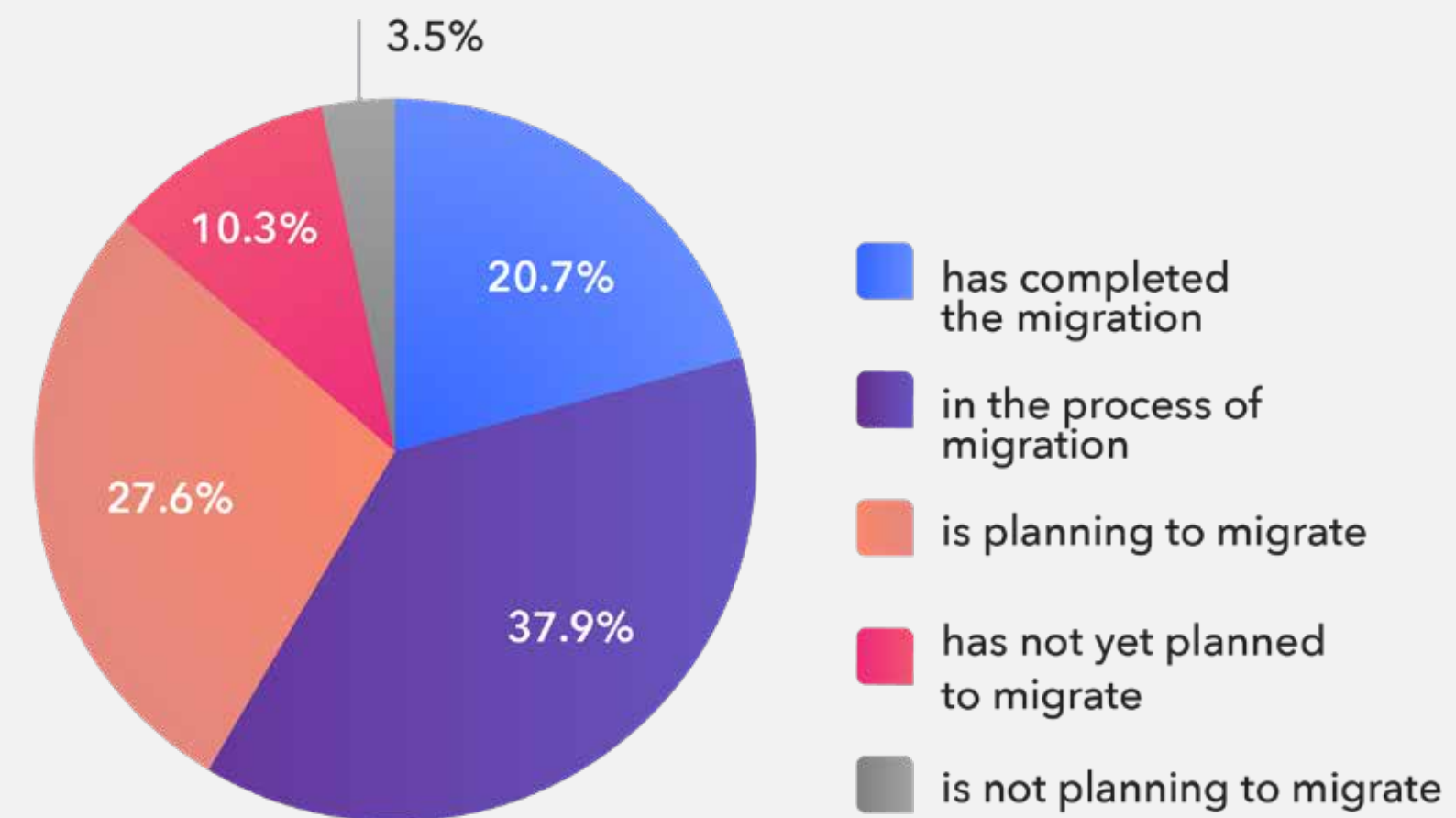
that these are long-term and complex projects, this is a fairly high percentage. Another 33% of companies using SAP are in the process of transformation, and others are still preparing for it. This means a further increase in demand for specialists, who must carry out this migration, and those who will deal with the maintenance of the new system after the transformation.

Has the number of SAP specialists in your company changed in the last 12 months?



Source: Awarson study.

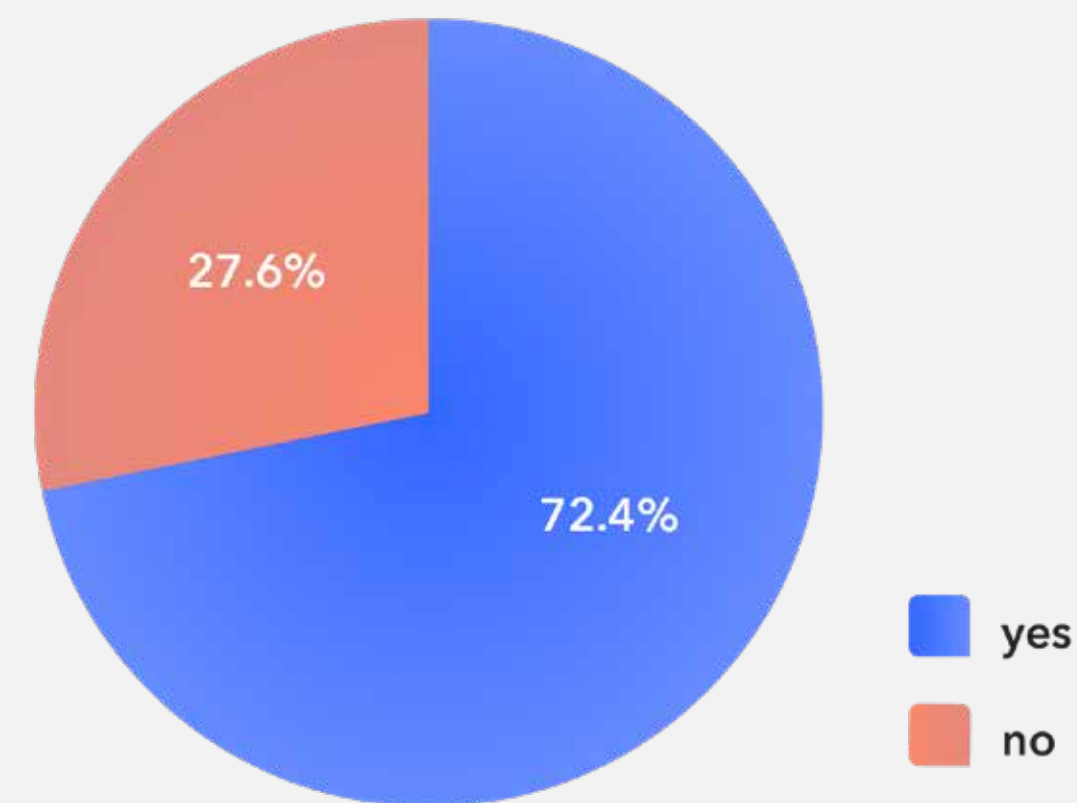
At what stage of migration to S/4HANA is your company?



Source: Awarson study.

It is, therefore, not surprising that 72% of companies signal a shortage of SAP specialists. At the same time, only a part of them declare that they will increase employment this year, while as many as 41% do not know whether they will expand their teams. The reason seems obvious: limited project budgets and a lack of adequate specialists, in terms of competence and salaries.

Is your company experiencing a shortage of SAP specialists?



Source: Awarson study.

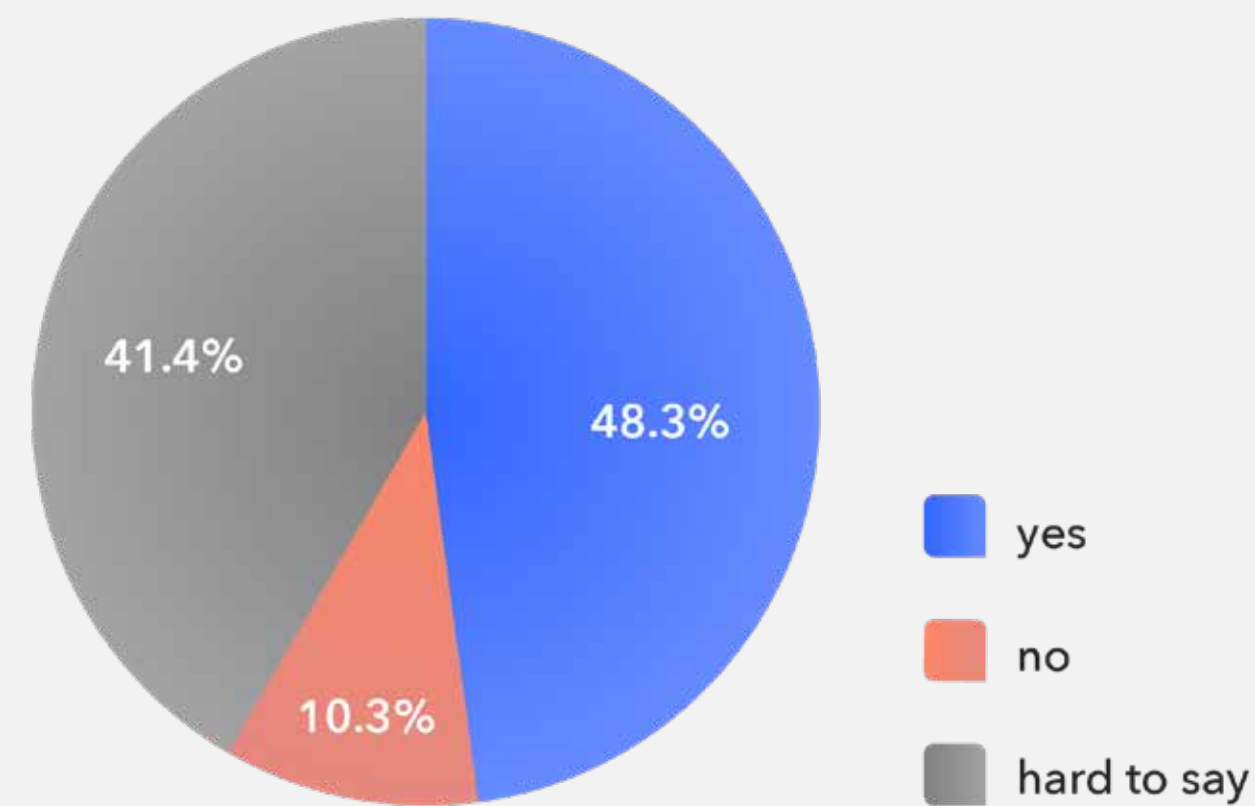


The forced transformation to S/4HANA by SAP compels companies to seek resources beyond their own backyard, and Poland is an excellent place for this. We have many competent, motivated professionals eager to develop. The desire for growth is the primary motivator for IT specialists to either stay in their current company or seek new opportunities. The SAP community in Europe is ageing, while the American market, having relied on alternative ERP systems for years, hasn't had the time to cultivate its own workforce. Polish consultants still offer competitive rates, and are an attractive alternative for foreign companies. Due to unpredictability, economic uncertainty, inflation, war, and a decrease in security, over

60% of consultants in Poland still work on a full-time basis, but there's a growing courage and willingness to work on B2B short-term projects. The more experienced ones opt for contracts, as they don't want to limit themselves to working for a single client. Many of them have rich experience in international projects, and provide excellent support for managers grappling with a multitude of complex challenges.

Anna Szczepowska
CEO Awarson

Does your company plan to increase its employment of SAP specialists in the next 12 months?



Source: Awarson study.

It is worth adding that despite the economic slowdown and the war in Ukraine, Poland remains an important destination for foreign direct investment (FDI). According to the Polish Economic Institute, in the years 2020-2022, FDI accounted for as much as 3.7% of GDP, with only Chile and Hungary having a higher rate in the world. In 2023, this indicator is even higher and amounts to 3.9% of GDP (PLN 133 billion). The trust of foreign investors, not only supports economic growth in Poland, but also generates a strong demand for the work of domestic IT specialists.



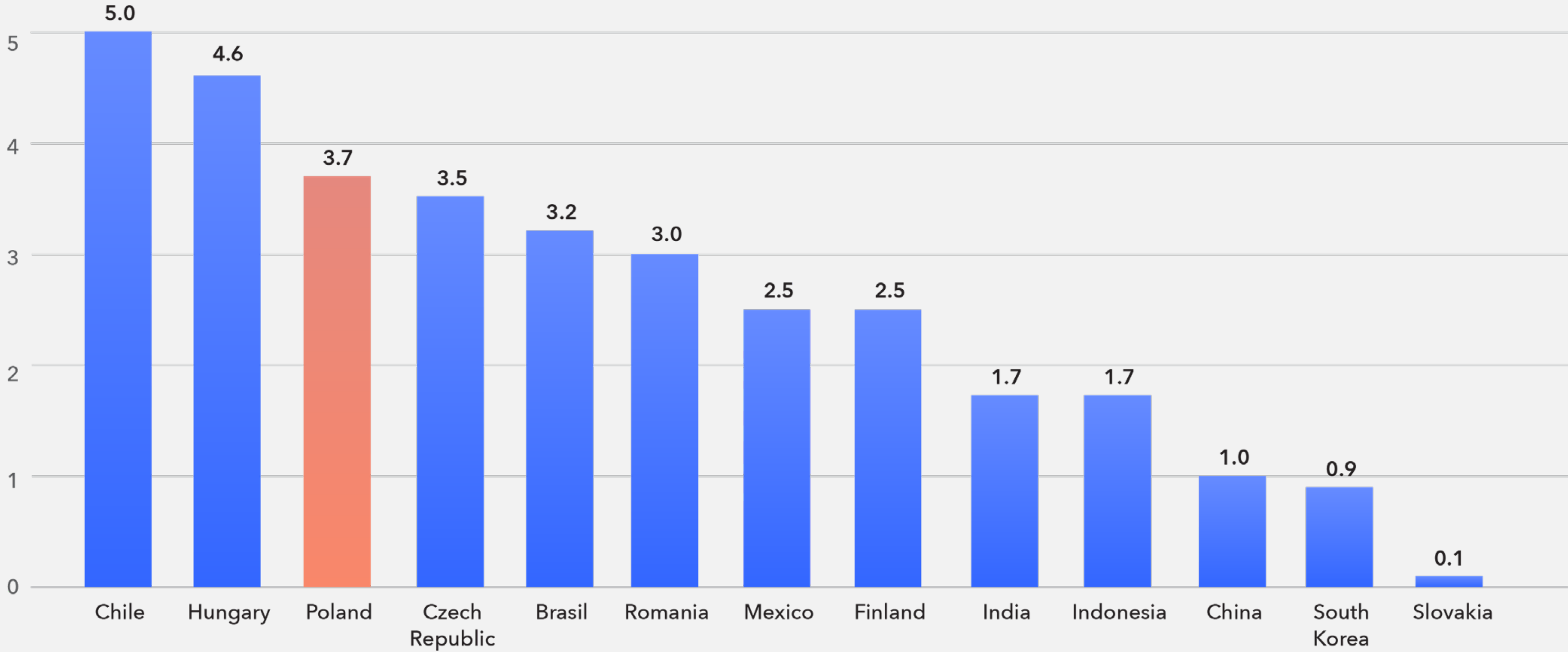
clients to undergo a thoughtful and efficient digital transformation, opening up enterprises to a new era of innovation delivered by cloud solutions, as well as investing in their own development and team competency.

Bartłomiej Wołoszyn

**Director of the Partner Channel
at SAP Poland**

Migration to S/4HANA is a pivotal step in a company's evolution. The challenge of the ERP system change is not only a technological necessity, driven by the end of support for SAP ERP ECC in 2027, but above all, is an opportunity for business process optimisation, leading to increased operational efficiency and competitiveness in the market. SAP, along with its partners, offers support in this transformation, providing various migration methods tailored to specific company needs. As the director of the partner channel at SAP Poland, I witness how our partnerships take on a new dimension in light of these changes. It's the perfect time for business development and, in particular, offering services that enable

FDI inflows 2020-2022 (as a percentage of GDP)



Source: Polish Economic Institute, UNCTAD.

02. Demographics and Market Outlook

52%

of SAP specialists
are aged 30-39

26%

of the SAP community
are women

30%

of consultants were
"key users"

93%

have had a higher education

96%

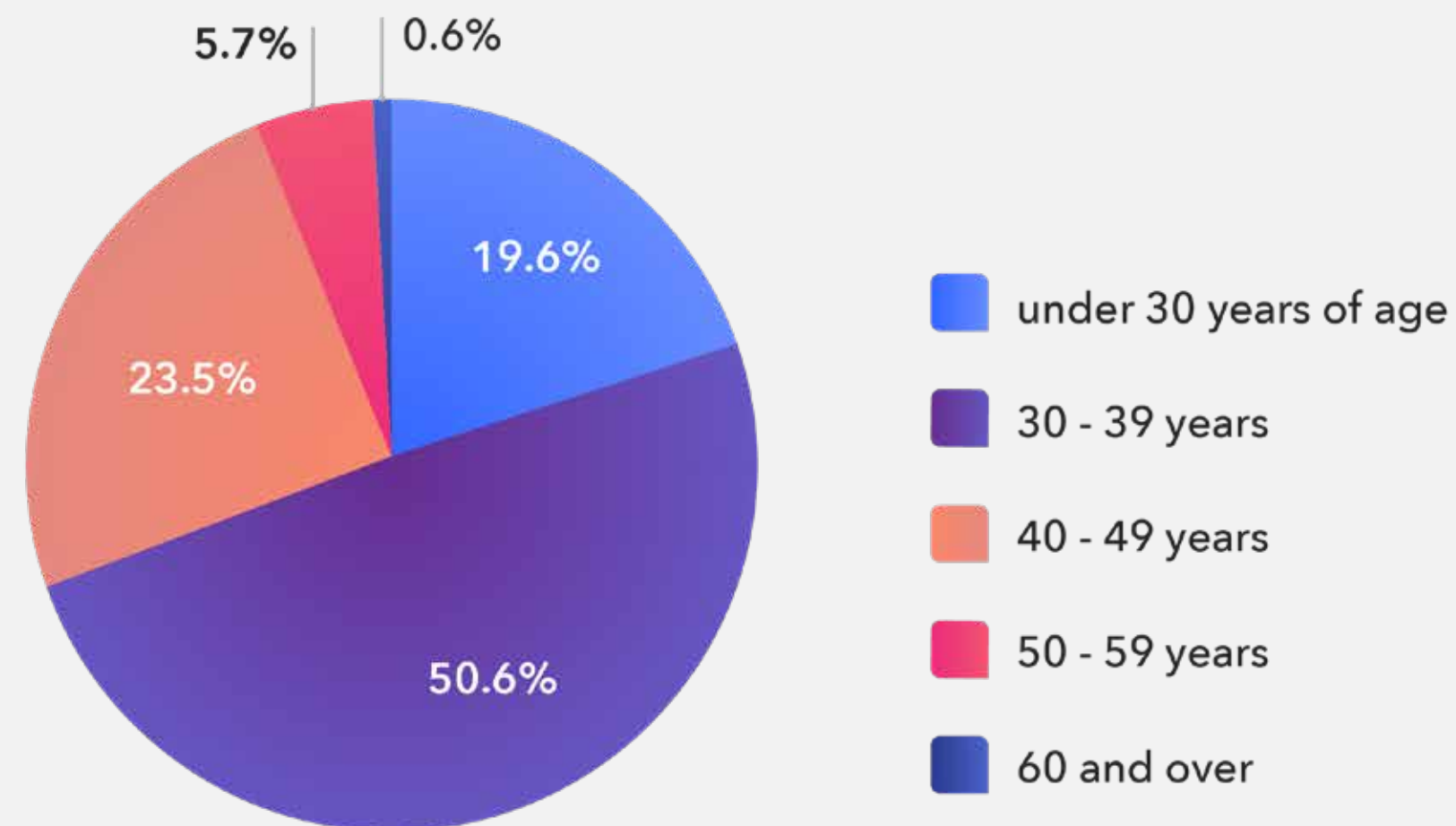
know English well,
or very well

51%

have at least basic
knowledge of German

The analysis of the age of SAP specialists in Poland provides reasons for optimism. The dominant age groups are those in their 30s and 40s. Millennials are described by labour market experts as hardworking, flexible, mobile, and innovative. Crucially, with the current retirement age at 60 for women and 65 for men, we can plan employment policies and knowledge

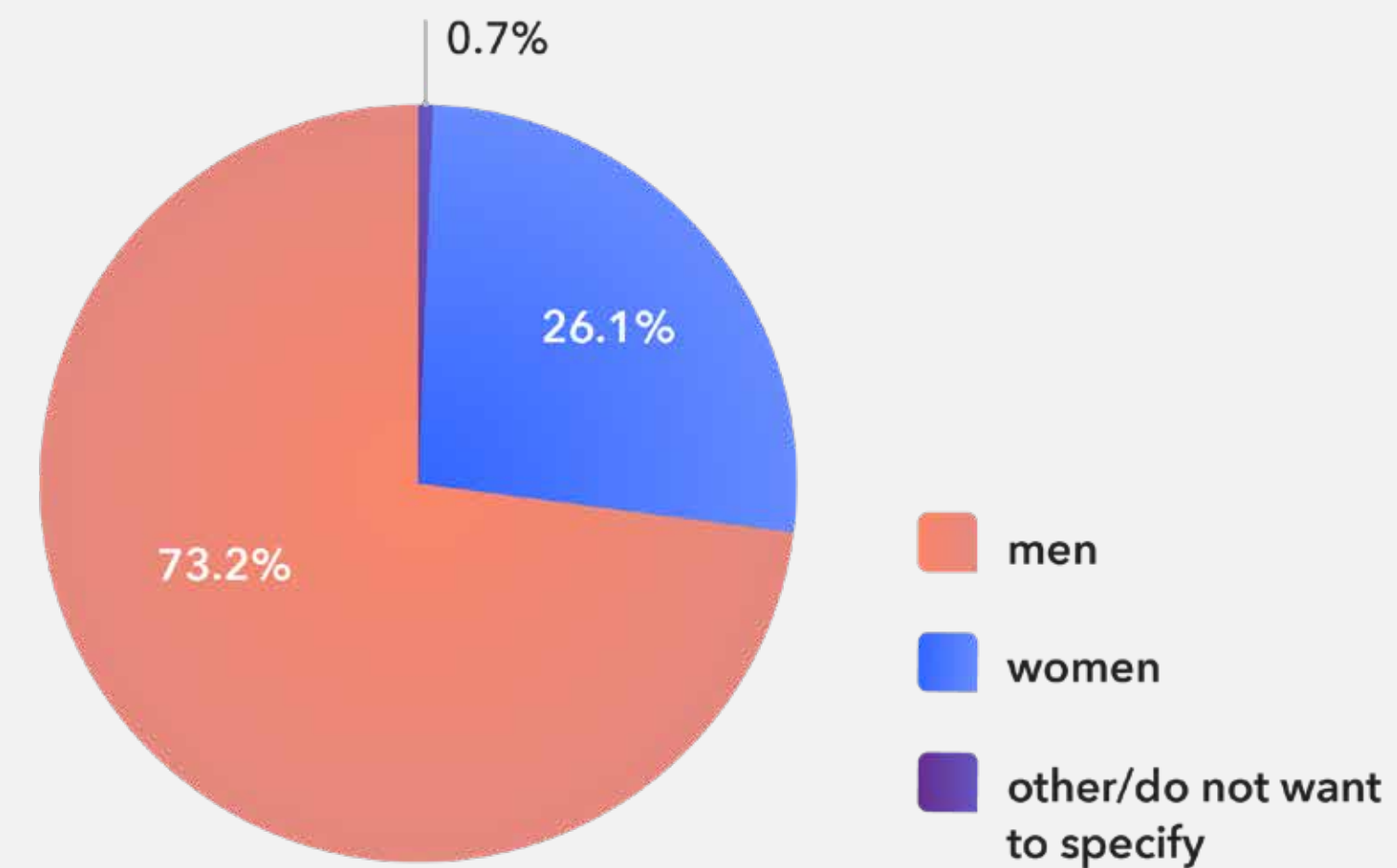
Age



Source: Awarson study.

transfer, even within a perspective of 20-35 years. However, the influx of the youngest group of SAP specialists should be seen as a warning signal. Currently, SAP specialists under 30 make up 19.6% of the entire community, which is a few percentage points too low.

Gender



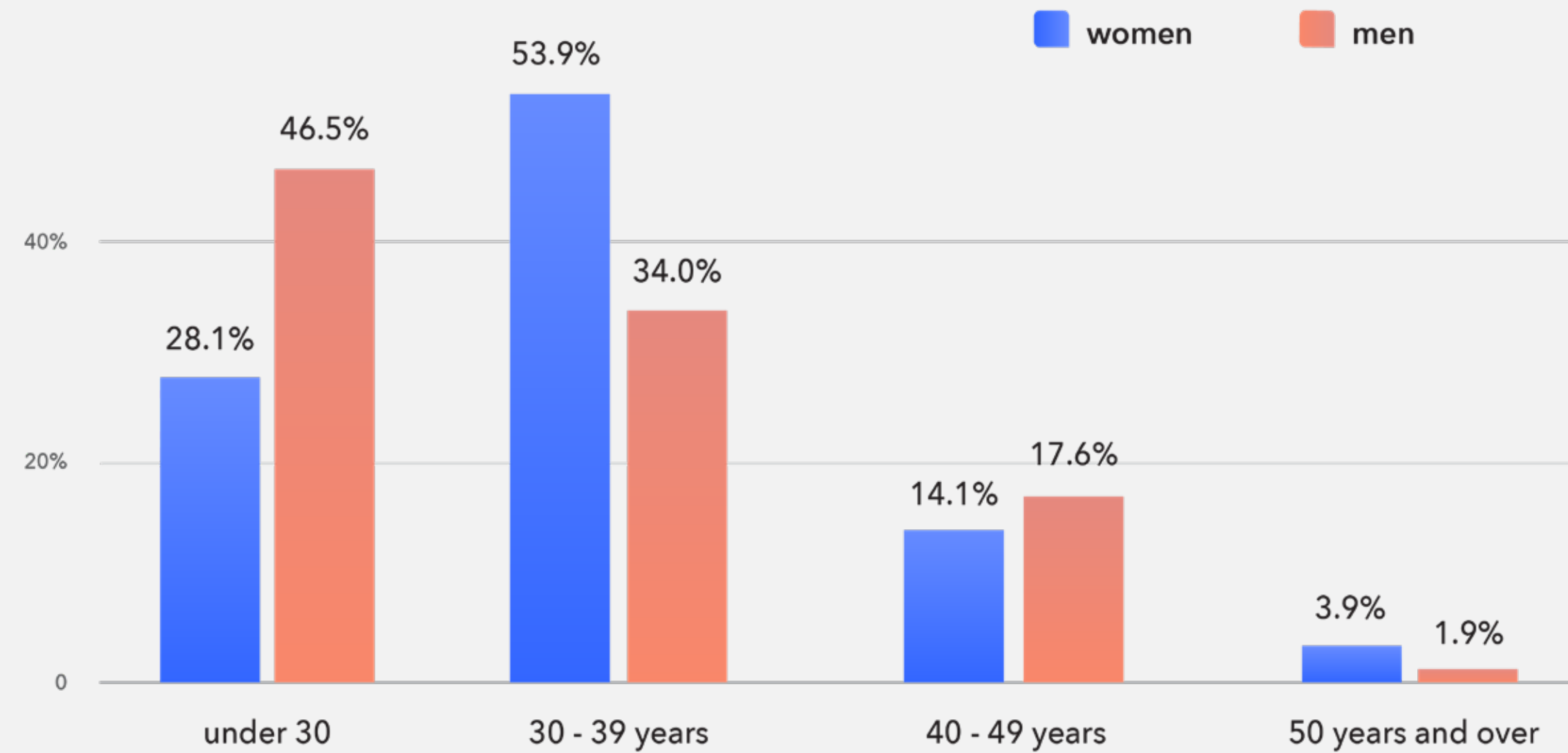
Source: Awarson study.

For comparison, in Scandinavian and DACH countries, the group of specialists over 50 dominates, and the market suffers from a deepening talent shortage. Poland can avoid similar problems, provided that we more effectively promote SAP work among those entering the job market today.

Just over a quarter of the SAP community are women. This is a result twice as good as for the entire IT industry, although still only half as good as the share of women in the entire labour market. SAP attracts

female specialists, by requiring not only technical knowledge, but also an understanding of business, relationship-building skills, meticulousness, and good work organisation. The data also shows that women often enter SAP later than men - for example, after several years of work as "key users." Empowering women can be one way to fill the competency gap in this industry.

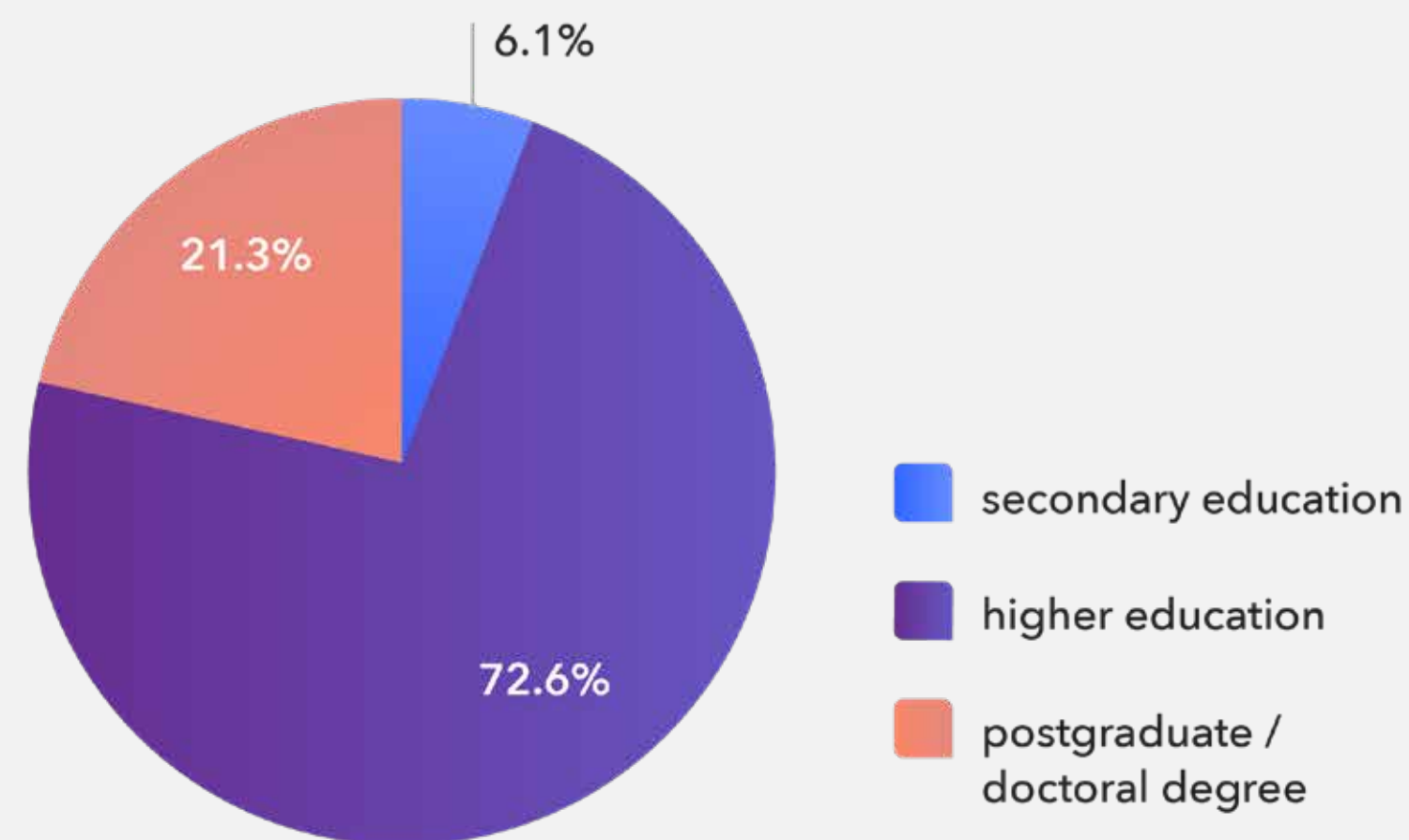
Age vs gender



Source: Awarson study.

The level of education among SAP specialists in Poland is impressive. It's clear that the choice of study field doesn't determine the choice of this profession. IT education is as common as economic-financial education. At the same time, specialists often opt for post-graduate studies in the business area they work in, such as logistics, management, or finance. They also eagerly pursue SAP certifications, because work requires continuous improvement and keeping up with changes in the business environment.

Education



Source: Awarson study.



Data analysis regarding the demographics of SAP consultants in Poland confirms the tremendous potential of this job market. An advantage is the age - the 30-39 age group constitutes as much as 51% of the respondents. These are workers characterised as flexible, quick to adopt new technologies, and open to international challenges. Another asset is their high level of education and proficient knowledge of English, enabling effective engagement in global projects or expansion into international markets.

A positive signal is also the significant percentage of SAP specialists under the age of 30. It is worth noting that the demand for young, albeit less experienced consultants,

is also evident in business practice, indicating the dynamic development of the IT sector in the country.

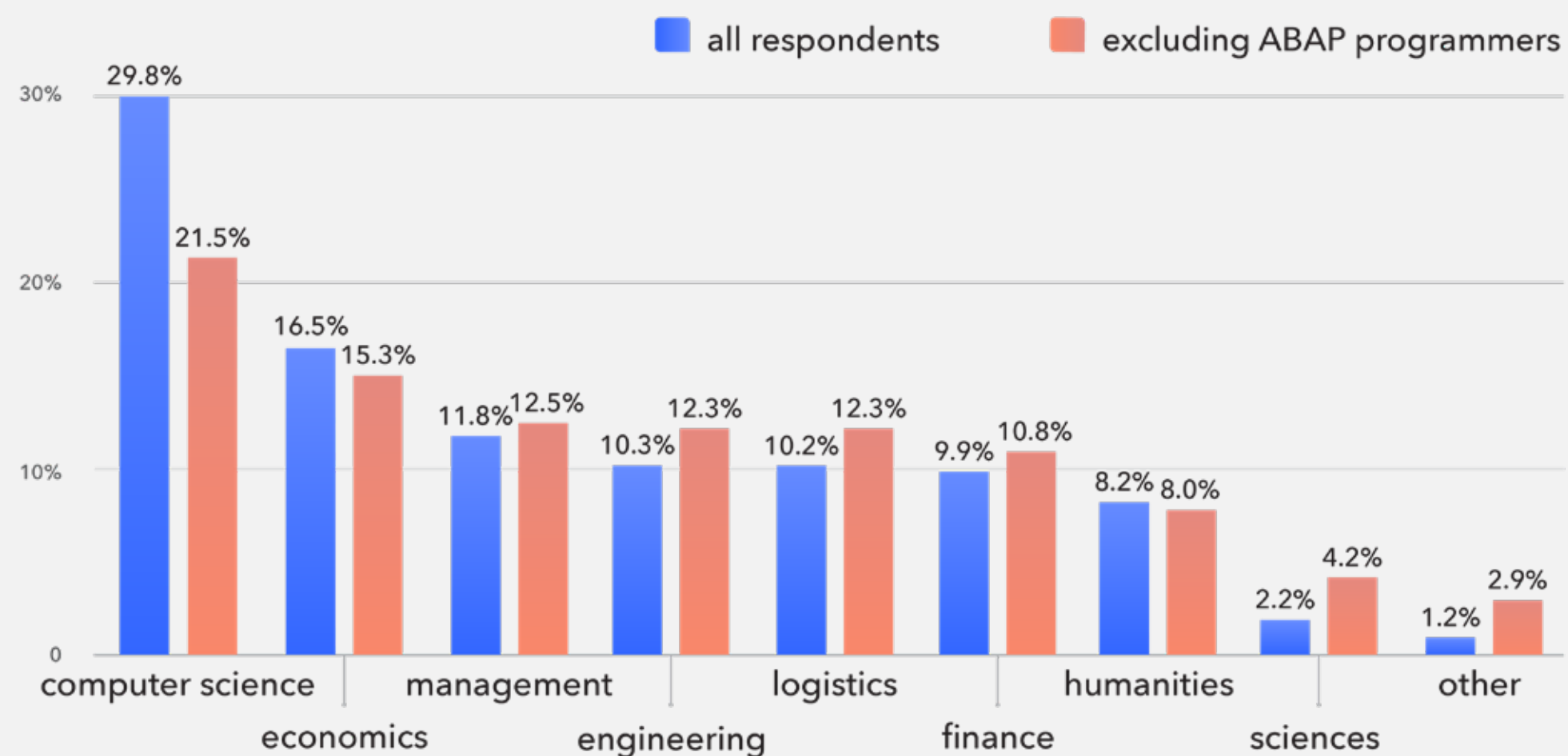
In the context of global trends in digital transformation and the growing importance of SAP solutions in business, the development prospects for specialists in this field are promising. Therefore, it is worthwhile continuing to invest in skills development and further education, to effectively meet the growing market needs, and build a solid career in SAP consulting.

Agata Paliwoda

Senior Key Account Manager at Awarson

However, studies are not a significant source of knowledge about working with SAP. Consultants and developers primarily learn by themselves, in practice. Each subsequent project provides additional experience. Other specialists, both with skills in the same area and related areas, are an important source of knowledge.

Fields of study



Source: Awareson study.



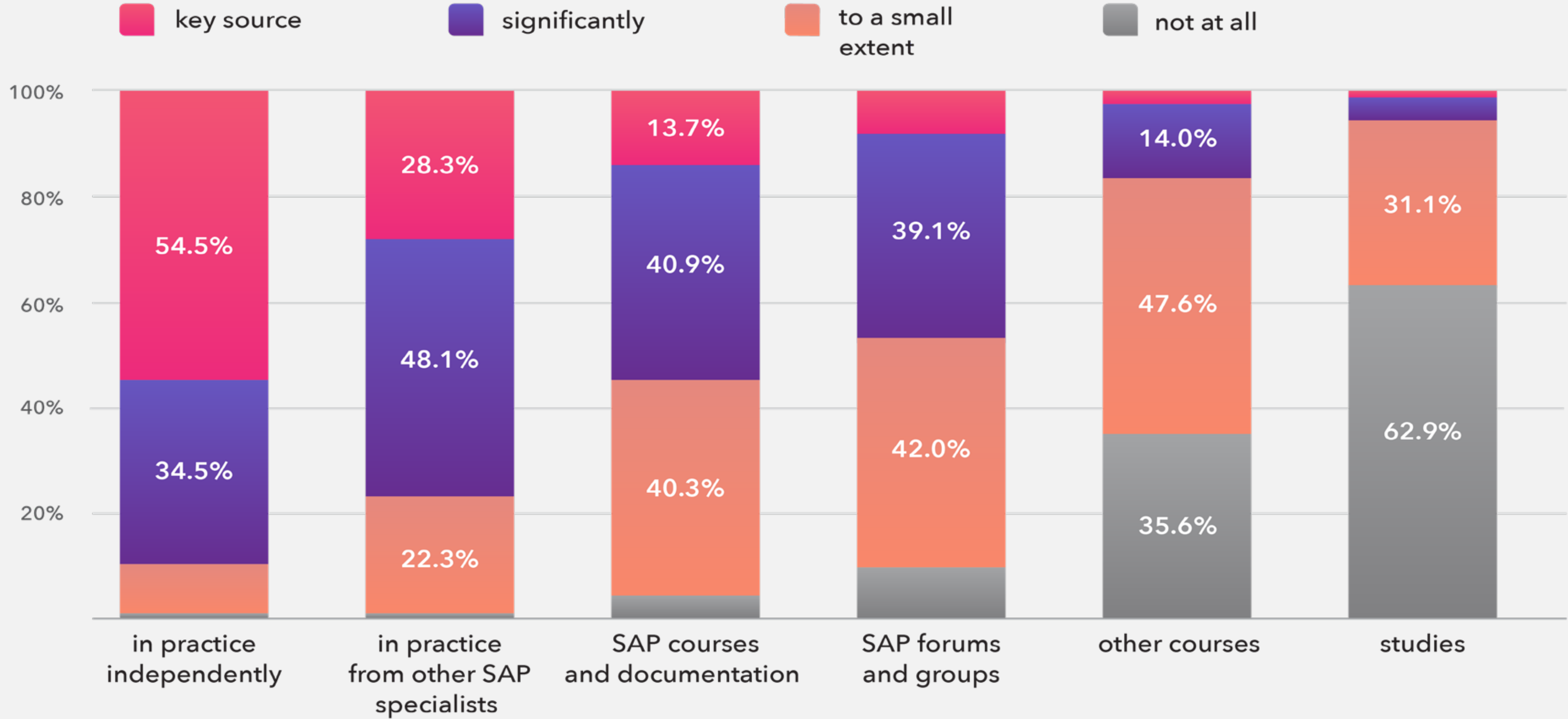
Reviewing the report on the SAP market in Poland, I can see that the dominance of individuals aged 30-39, indicates the maturity of the industry. The noticeably smaller number of consultants under 30, suggests the need to attract younger talents. It is interesting to note how many start as “key users,” underscoring the importance of experience. The career path to the role of SAP consultant is an evolution of skills, especially with the transition to S/4HANA. The popularity of post-graduate studies among experienced individuals, demonstrates the value of specialised knowledge.

From my perspective, promoting a career in SAP among young people,

through educational initiatives is crucial. Offering internships and courses that combine theory with practice, can not only showcase professional potential in the industry, but also attract young talent, addressing the market demand for SAP specialists. This path highlights the importance of combining business experience with technical skills.

Małgorzata Chustecka,
SAP job market specialist, lecturer in SAP post-graduate studies.

Sources of knowledge about SAP

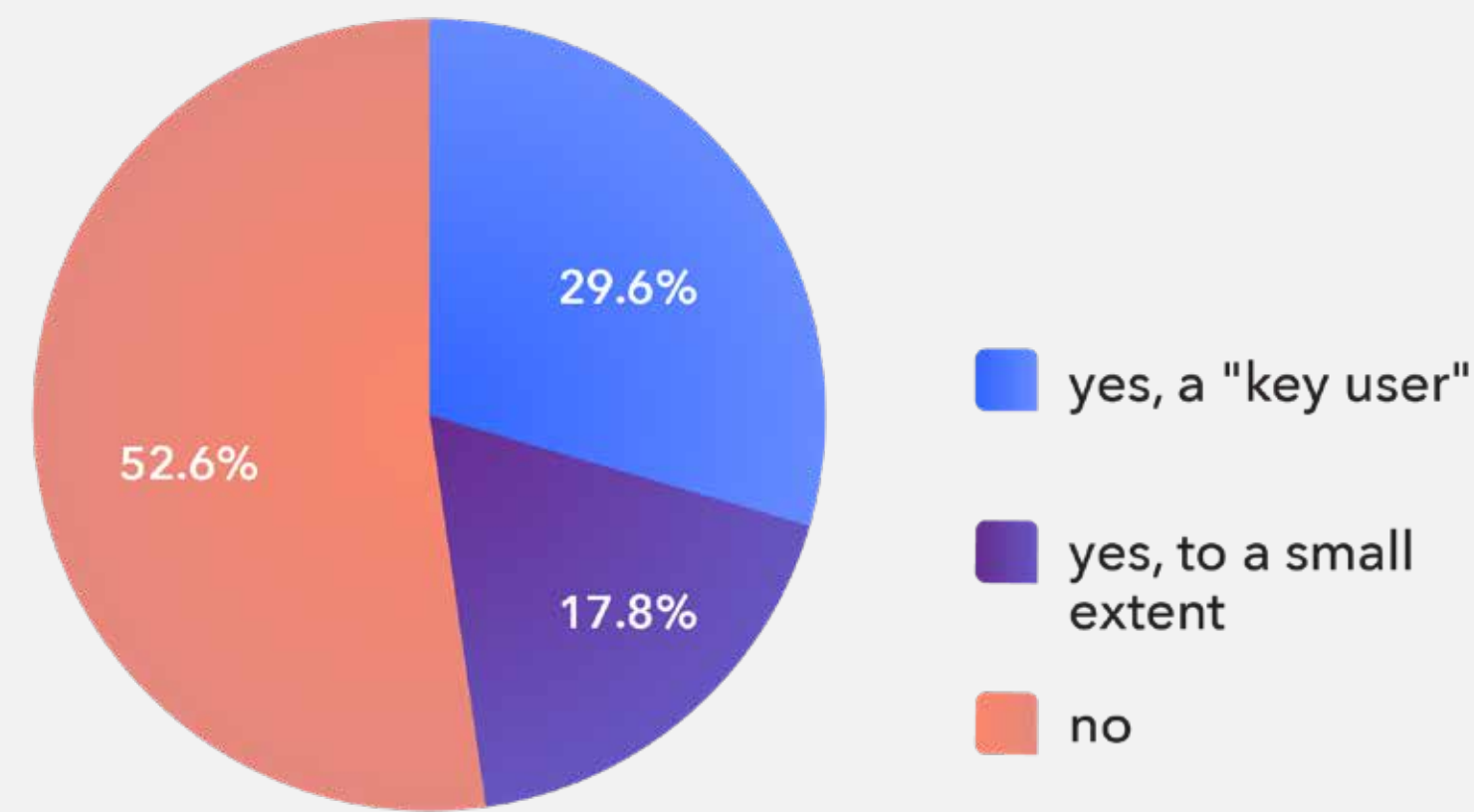


Source: Awarson study.

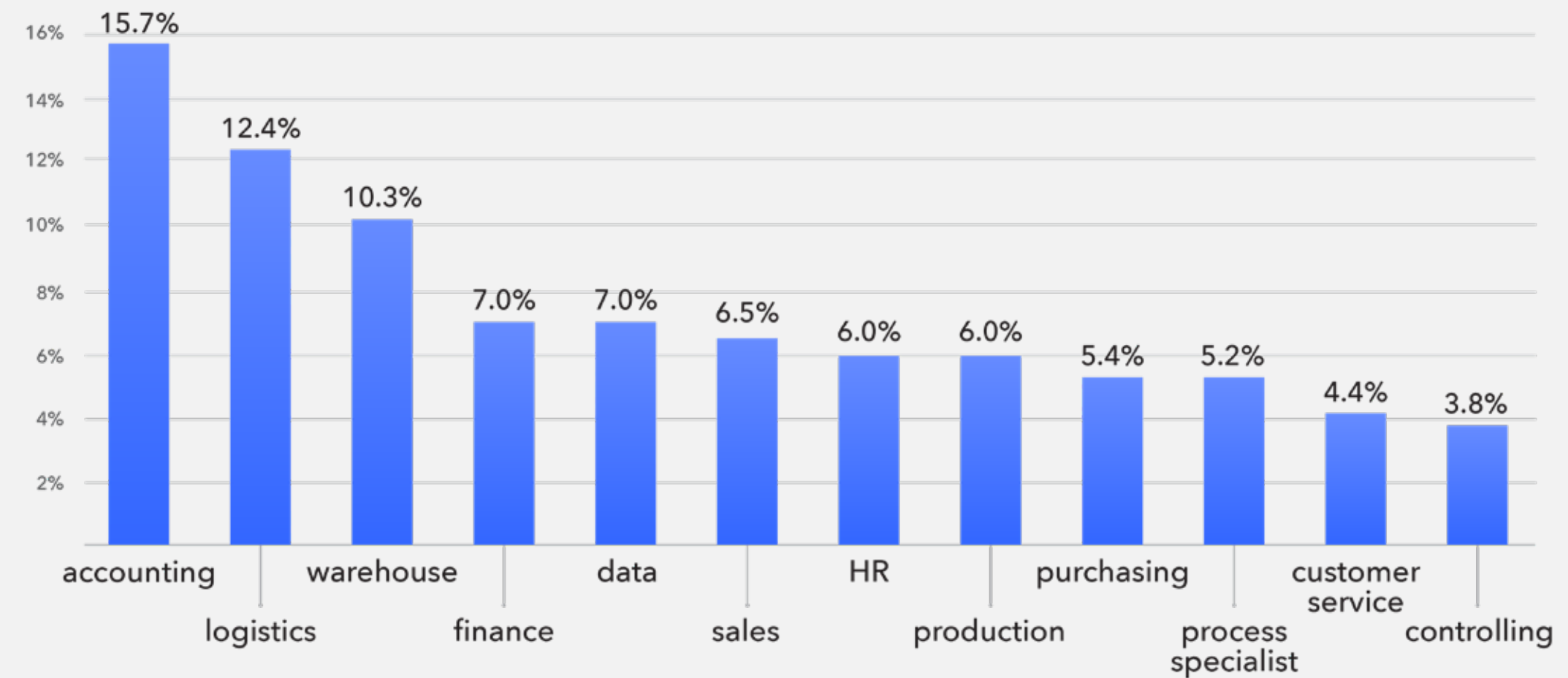
The data confirms market observations that the natural career path in SAP is from "key user" to consultant or developer. Experience in working with

the system from the user side is not itself an advantage in the recruitment process, but it significantly facilitates work and development afterwards.

Were you an SAP user before you became a consultant?



"Key user" in what area you were/are:



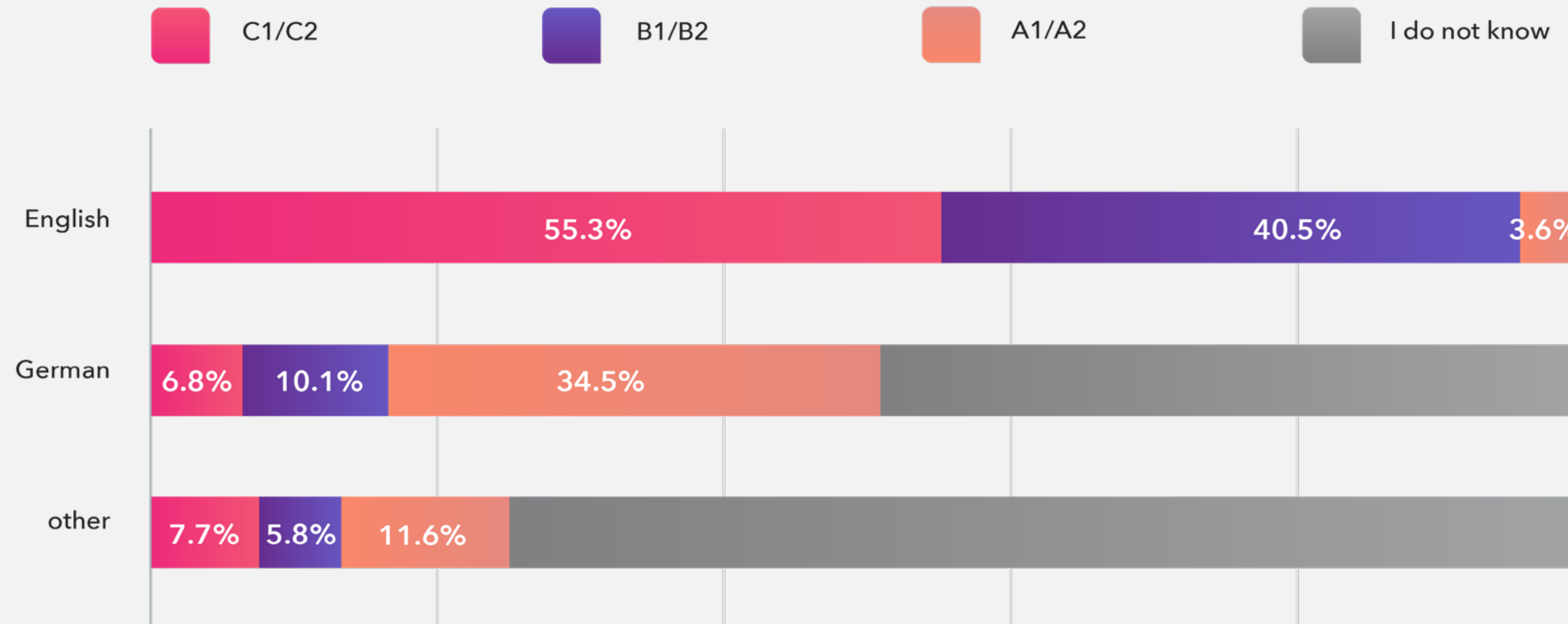
Source: Awarson study.

Source: Awarson study.

Knowledge of foreign languages, especially English, is usually a basic requirement in SAP work. Projects and teams are often international and require good communication. Knowledge of German is also an advantage. In

the case of contracts for German-speaking companies, proficiency in German can increase a candidate's rate by up to 15%. Other popular languages among consultants include: French, Spanish, and Russian.

Knowledge of foreign languages



Source: Awarson study.

03. Skills and Development Directions

29%

of SAP specialists have
5-9 years of experience

92%

of companies will be hiring
seniors

36%

of consultants are familiar
with S/4HANA

MM

is the most popular module.
38% of respondents are
familiar with it

45%

of respondents are
deepening their knowledge
of S/4HANA

32%

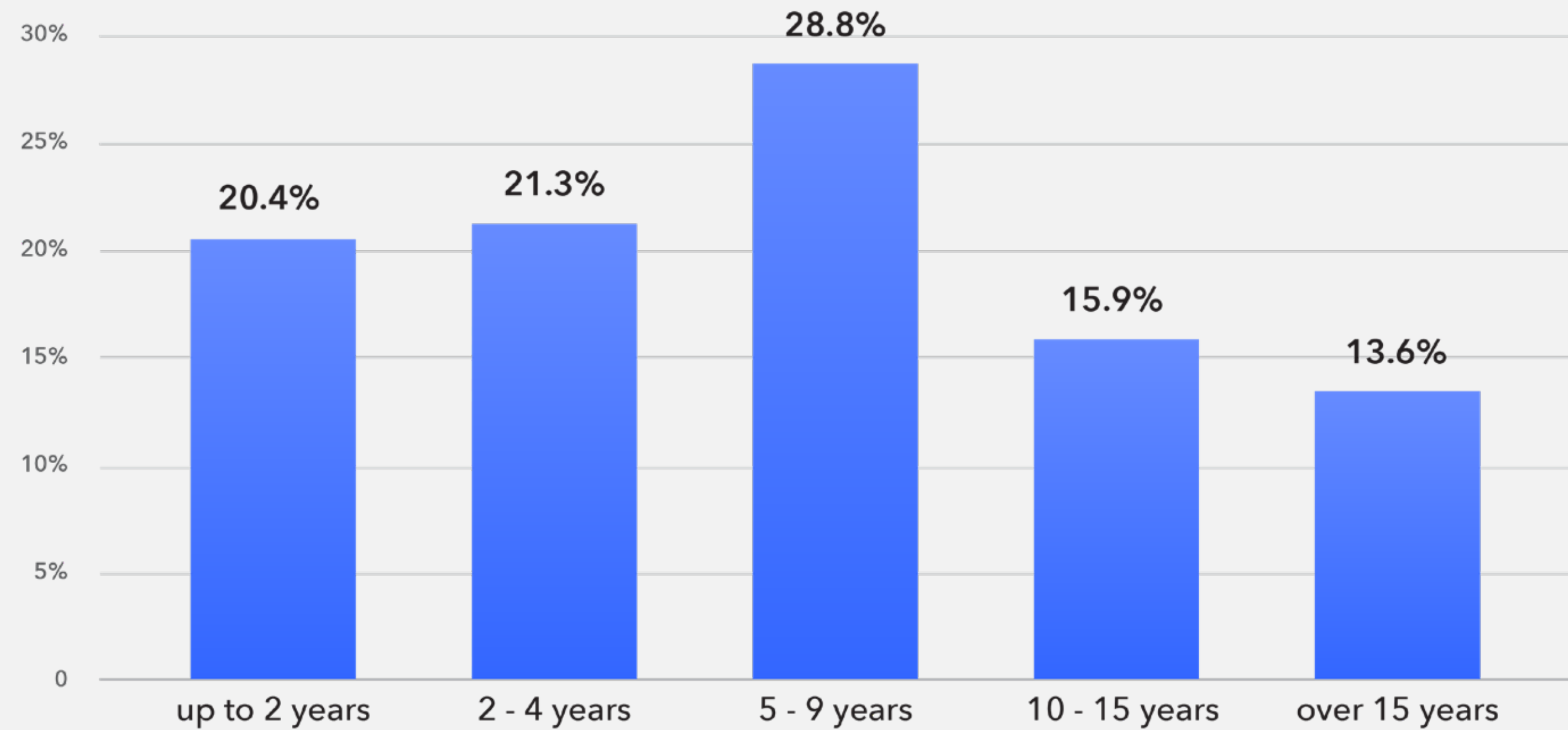
of consultants want to learn
ABAP language

The German SAP system has been present in Poland for just under 30 years, and we can already boast a sizeable group of experts with over 15 years of experience. This speaks to the maturity of the market. Its potential is still firmly growing. The largest group consists of specialists with 5-9 years of experience, and they are the most sought after by employers - they are

already independent, yet still flexible, and expect reasonable compensation for their work.

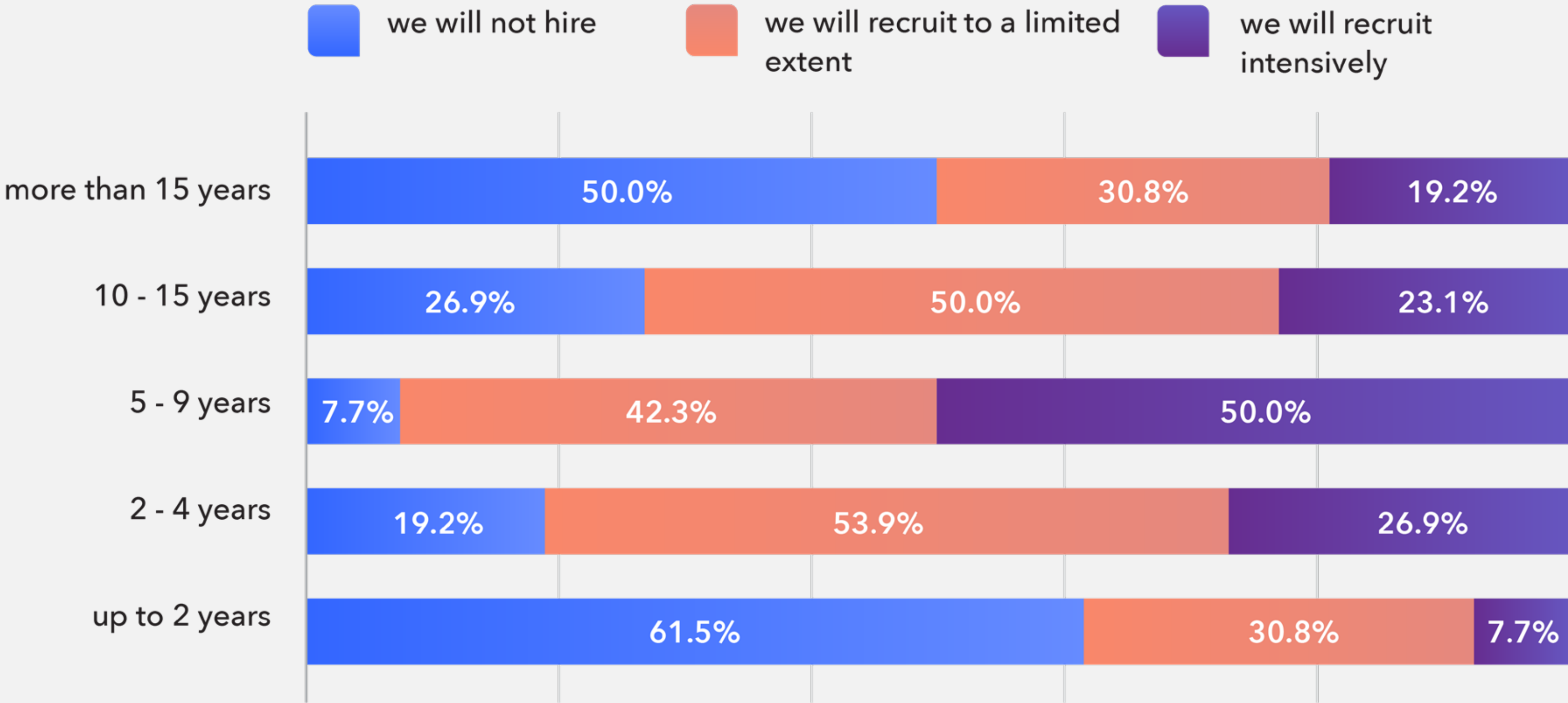
High salaries, lack of formal entry barriers into the profession, and innovations introduced into SAP attract juniors to it, albeit though somewhat slowly.

Experience



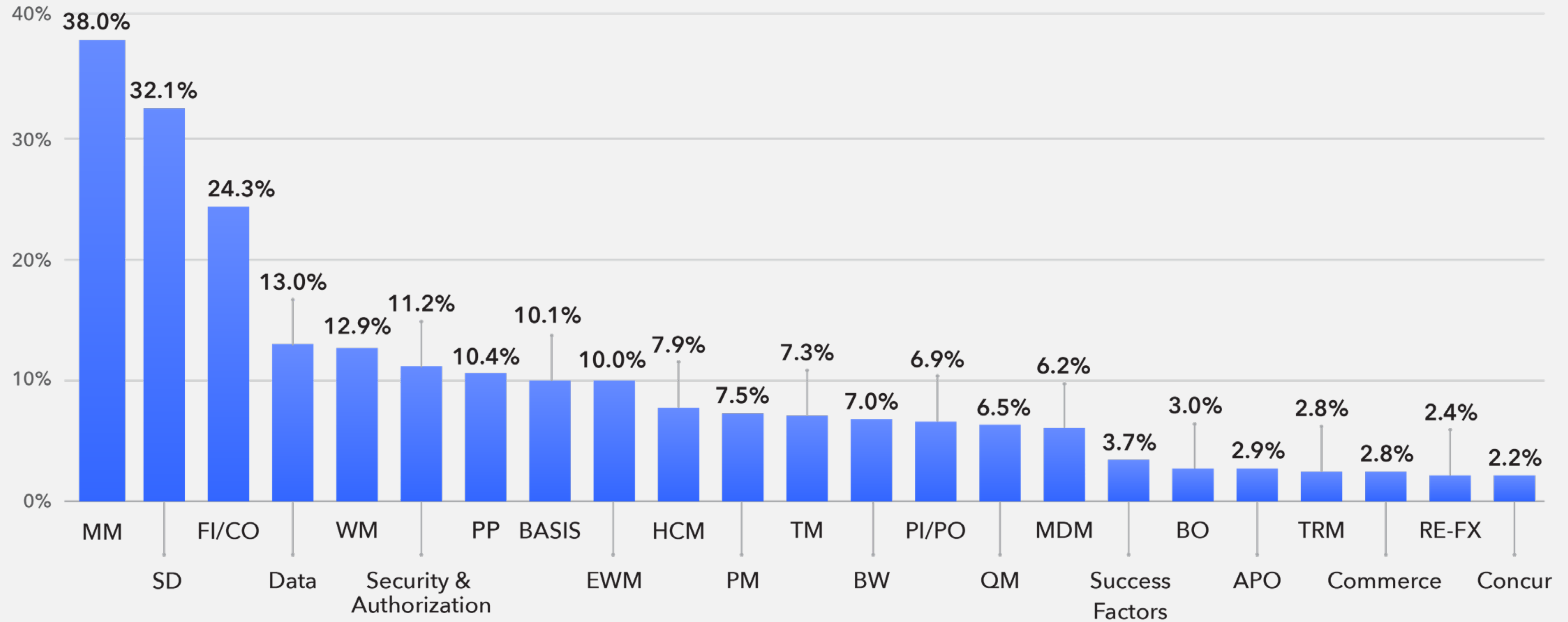
Source: Awarson study.

Specialists with what level of experience will you employ?



Source: Awarson study.

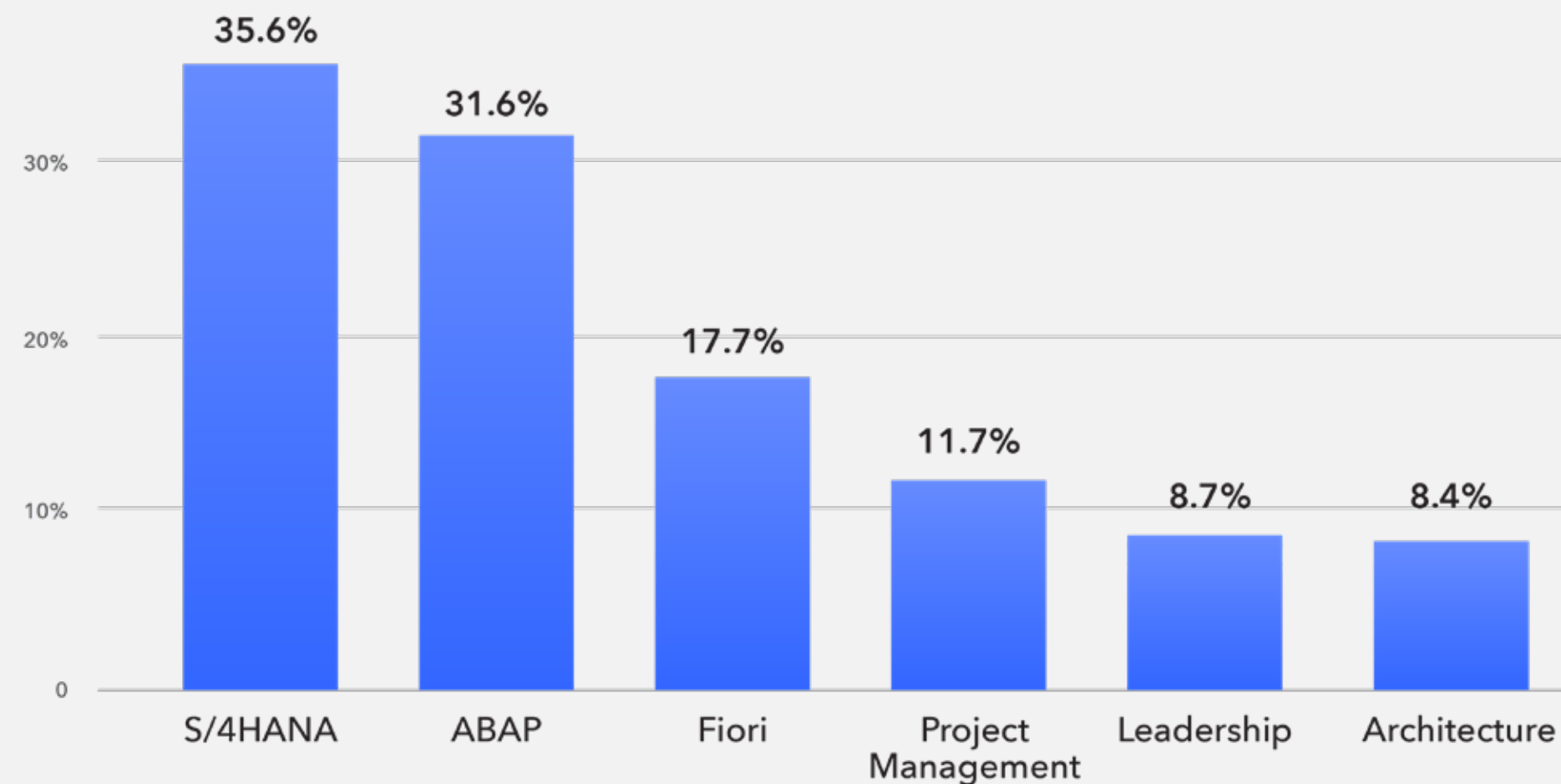
Knowledge of SAP modules



Source: Awarson study.

Competencies in the SAP area reflect business needs: production, sales, and logistics, which is a logical consequence of the fact that many manufacturing organisations have chosen Poland as the location for their factories. There is also a high percentage of specialists in financial modules, which are used by most companies. Consultant knowledge in the area of security is also growing dynamically (a little over 5% a year earlier).

Other competences in the SAP area



Source: Awarson study.



I look at the market from the perspective of someone just before go-live on S/4HANA. From this point of view, the fact that only 33% of respondents declare familiarity with the new system version is not much. Even more surprising is that in the next 3 years, 45% of respondents want to gain or deepen their knowledge of S/4HANA - I would have expected about 70%. Perhaps this approach stems from the fact that working with some modules in S/4HANA, differs only slightly from that in the ECC version.

I suspect that over the next few years, demand for SAP experts with S/4HANA will increase, as will team rotation. Already today, managers have a big problem with

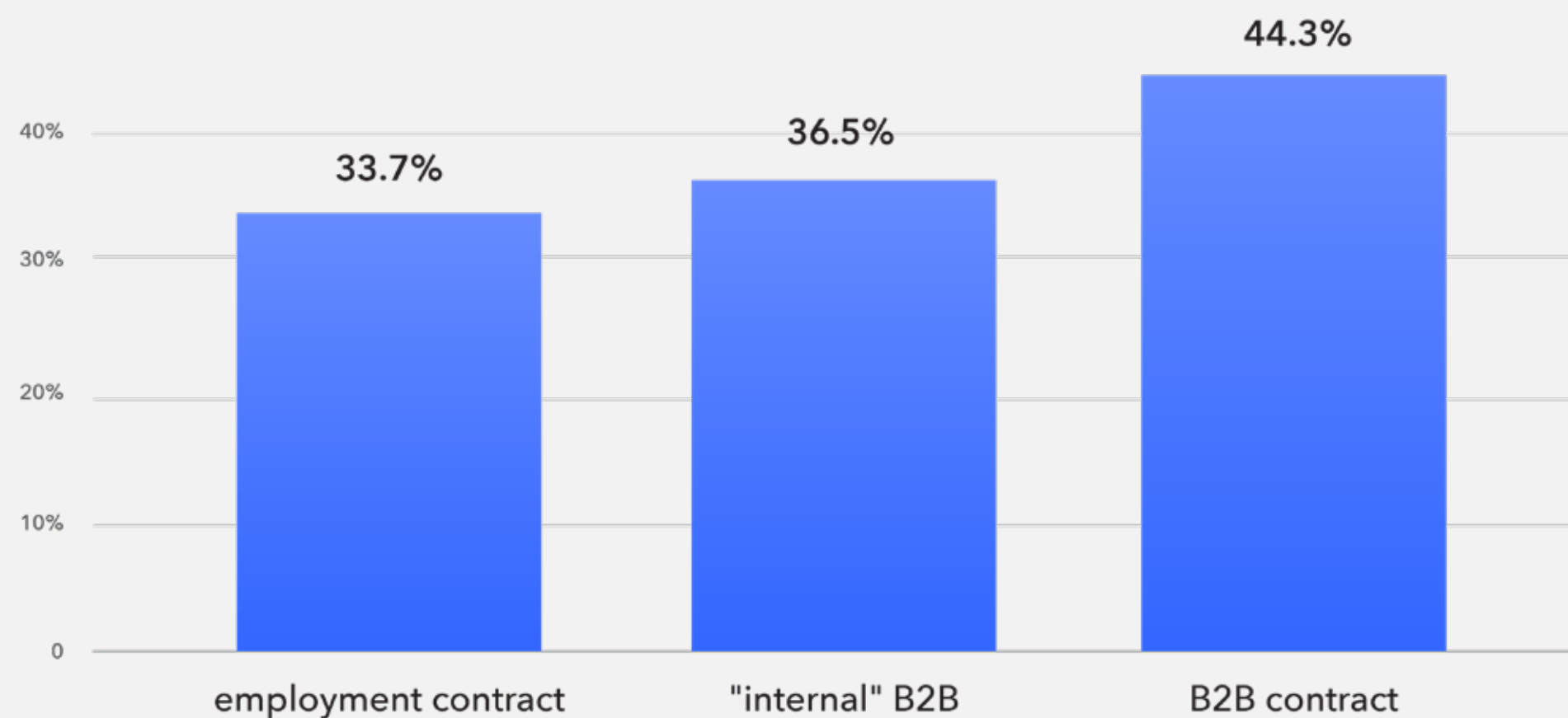
hiring consultants and developers, and many companies are only planning their migration. Finding SAP experts for permanent positions takes up to 6-8 months, and no one who has decided to migrate will spend that much time building a team. Therefore, companies that are starting or planning a transformation, first look for smaller and larger partners in the outsourcing area. On the other hand, after switching to the new version, many managers will be looking for permanent staff to maintain and develop the system after the changes.

Klaudiusz Pastuszka

SAP Program Manager, CANPACK

Consultants respond promptly to the business needs of clients and changes introduced by the system manufacturer. Competencies in the area of S/4HANA are already declared by over 33% of respondents, which aligns with company data on the level of migration progress to the new system. Nearly 18% of respondents also know SAP Fiori (just 2% a year ago).

Knowledge of S/4HANA vs type of contract



Source: Awarson study.



The presented data indicates the maturity of our SAP market, but also the continuous improvement of consultants. The median of their experience is about 7-8 years, which means that we have many consultants, who started working back in the days of classical ERP, and about 20-25% have seen and probably implemented, an even older version of the system - SAP R/3.

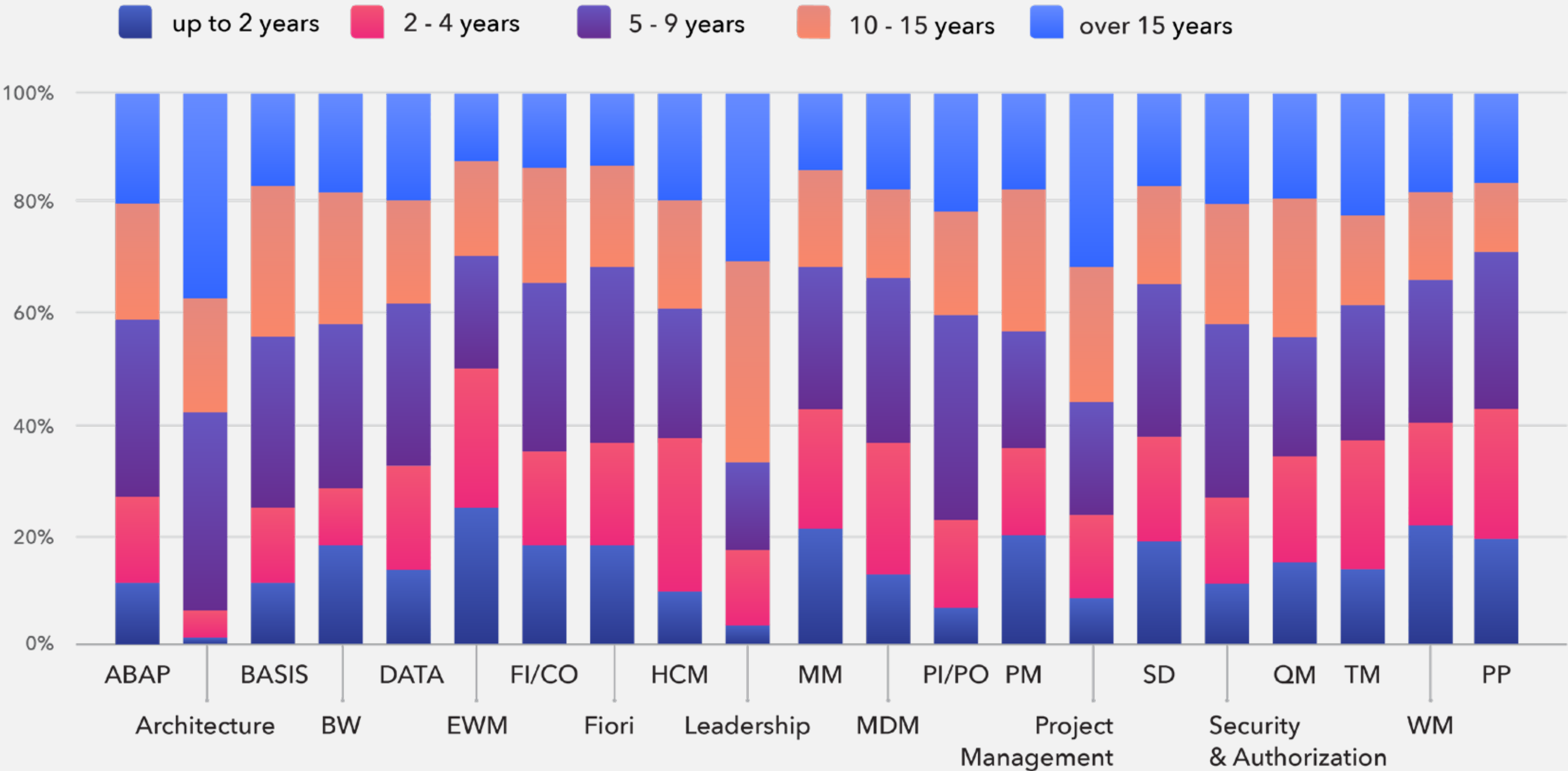
Looking at the distribution of expertise among Polish specialists, logistics, financial, and technical areas come to the forefront. Based on this, it can be inferred that we have many consultants significantly influencing the architecture of supply chains, in combination with finances and settlements with contractors.

Worth mentioning is also the development of technical consultants in the area of the latest user interface - SAP Fiori.

Polish SAP experts are appreciated for their business knowledge and their ability to adapt the SAP system to the specific needs of clients. Unlike their counterparts from Western Europe, they usually specialise in 2-3 business areas instead of just one. It can be argued, therefore, that they will also be pioneers in the implementation of modern technologies, setting the direction for business leaders using SAP solutions.

.Michał Wierzbowski
SAP Business Strategic Advisor
at Awarson

Seniority vs competence in SAP

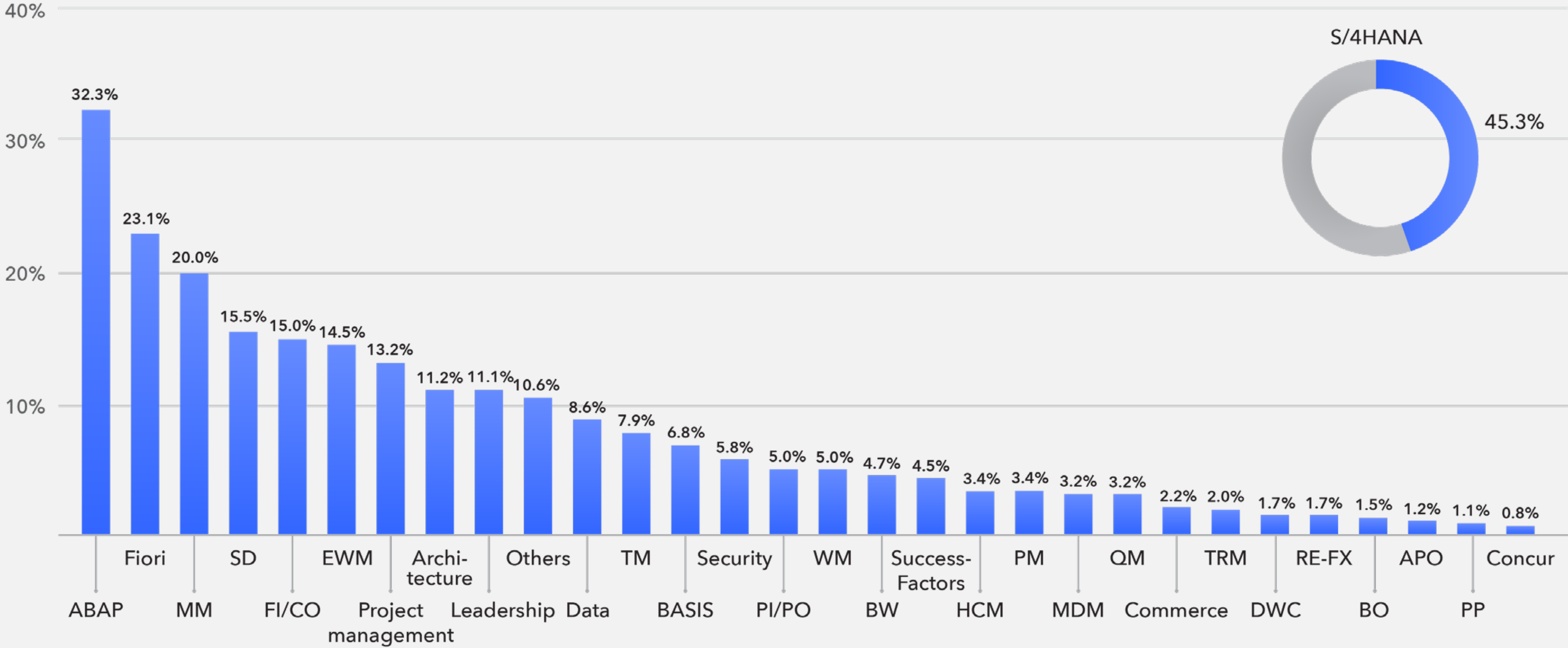


Source: Awarson study.

Over the next 3 years, the majority, almost half of the respondents, want to gain or deepen their experience in the area of SAP S/4HANA, which is not surprising in the context of ongoing and planned migrations in companies. The second area of interest is ABAP, which is not only taught to developers,

but also to consultants, who want more independence in implementing simple changes and extensions to standard functionalities. Interest in the new interface - SAP Fiori - is also growing.

What SAP areas do you want to develop in the next 3 years?



Source: Awarson study.

04. Employment Forms

65%

of SAP specialists work under an employment contract

37%

of experts with 15+ years of experience choose an employment contract

85%

of women choose an employment contract

12 months

is the most common contract length (30%)

1/5

of respondents work for more than 1 company

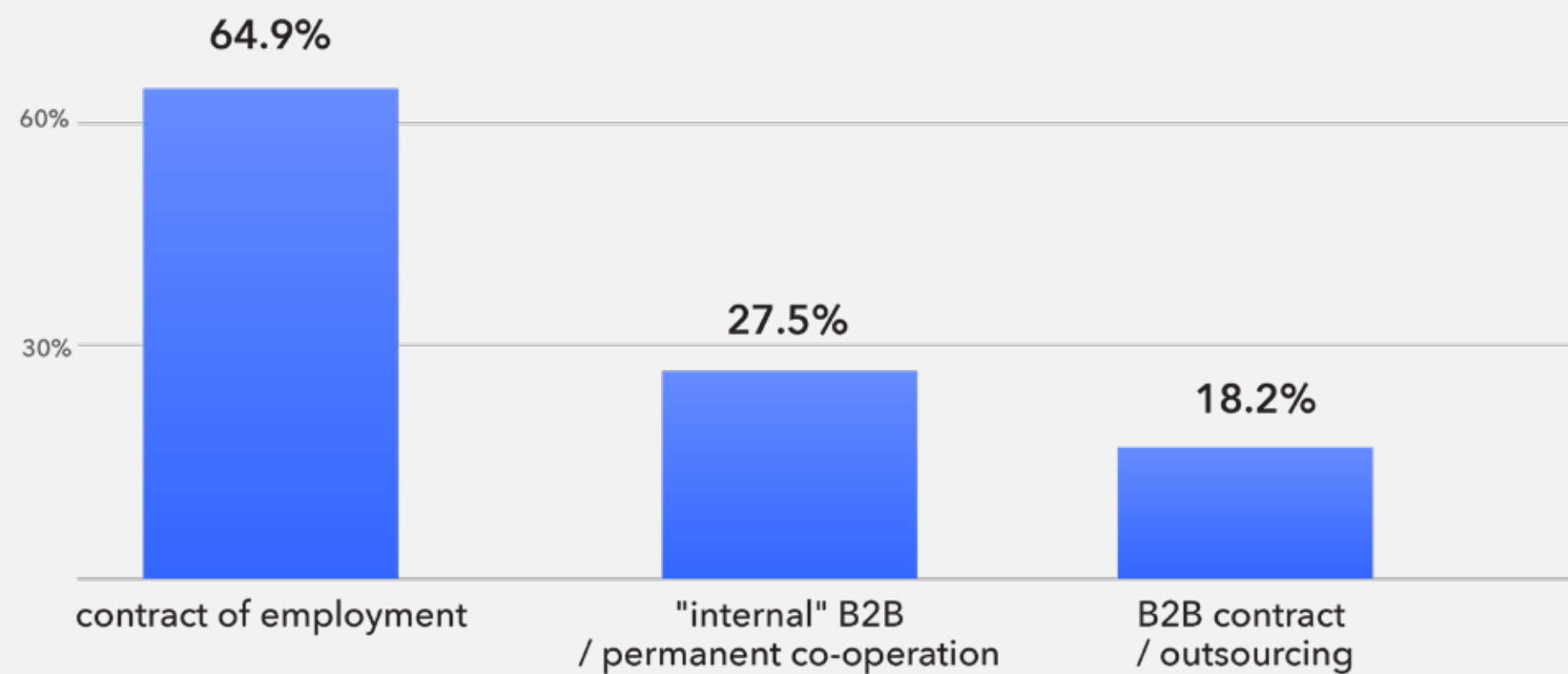
54%

of the SAP community work for consulting firms

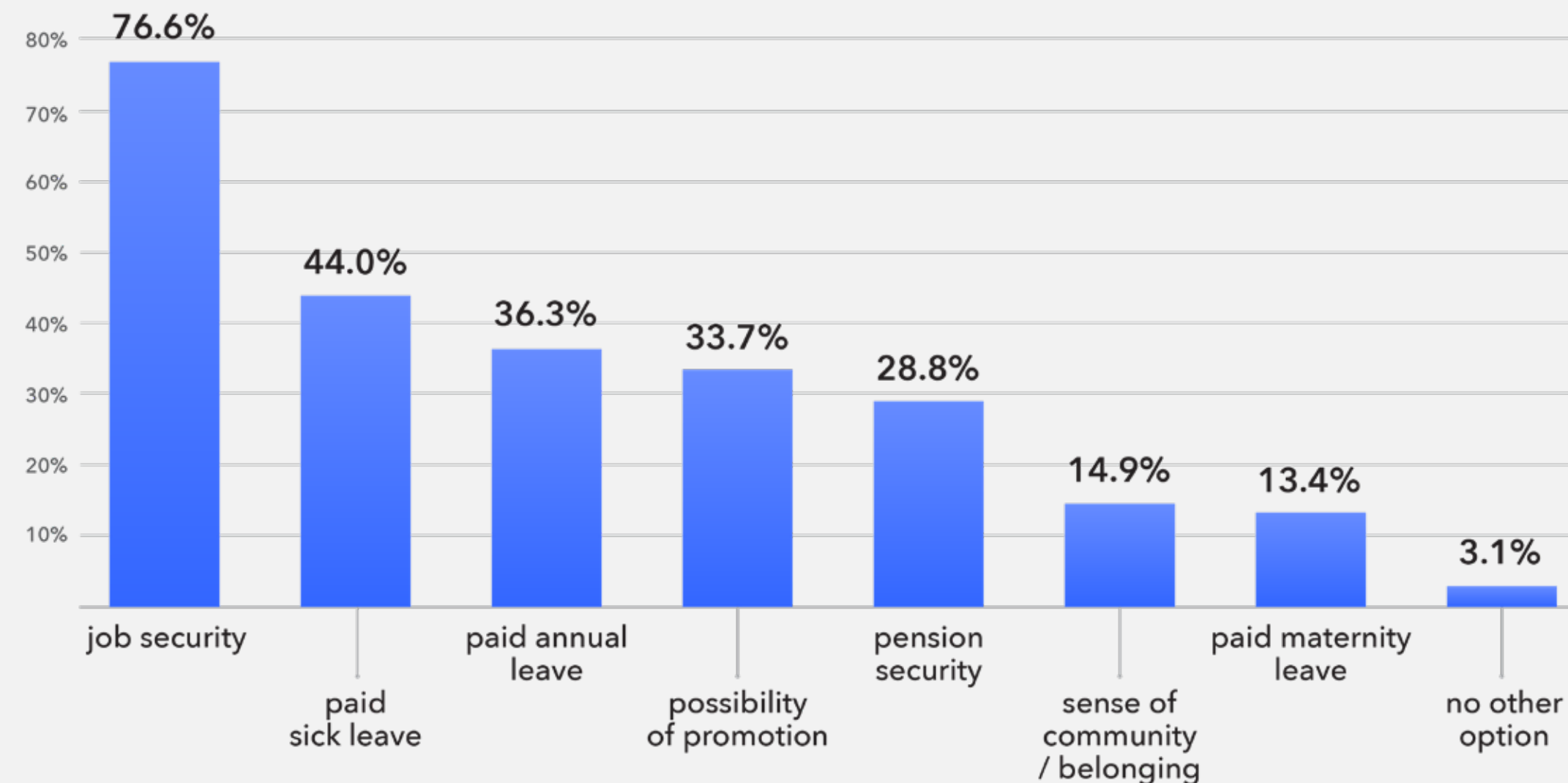
An employment contract is the dominant form of employment for SAP specialists. It is most commonly chosen by women (81.5% of survey participants) and juniors. With experience (and increasing earnings), interest in alternative types of contracts grows. The increase in labour costs drives both sides to co-operate through B2B partnerships via consulting and outsourcing firms or through "internal" B2B, which is a long-term and direct collaboration between the company and a self-employed consultant.

However, over the past years, it is evident that both companies and candidates are increasingly leaning towards 'insourcing', or building internal teams. Employers rightly see this as a way to reduce turnover and build more effective long-term relationships with employees. Contracts are chosen where there is limited time to build a project team and limited time to complete tasks.

Form of employment



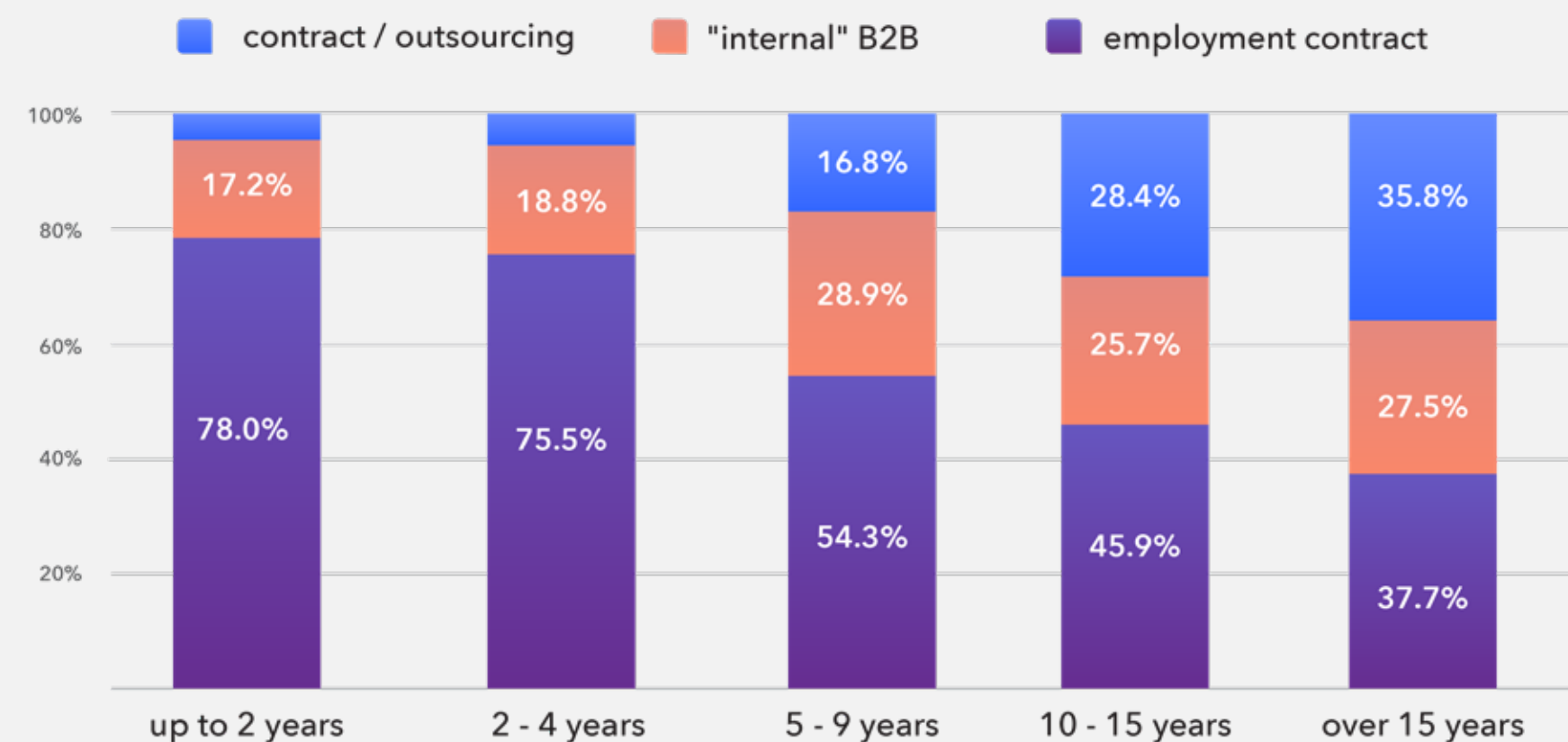
Reasons for choosing an employment contract



Source: Awarason study.

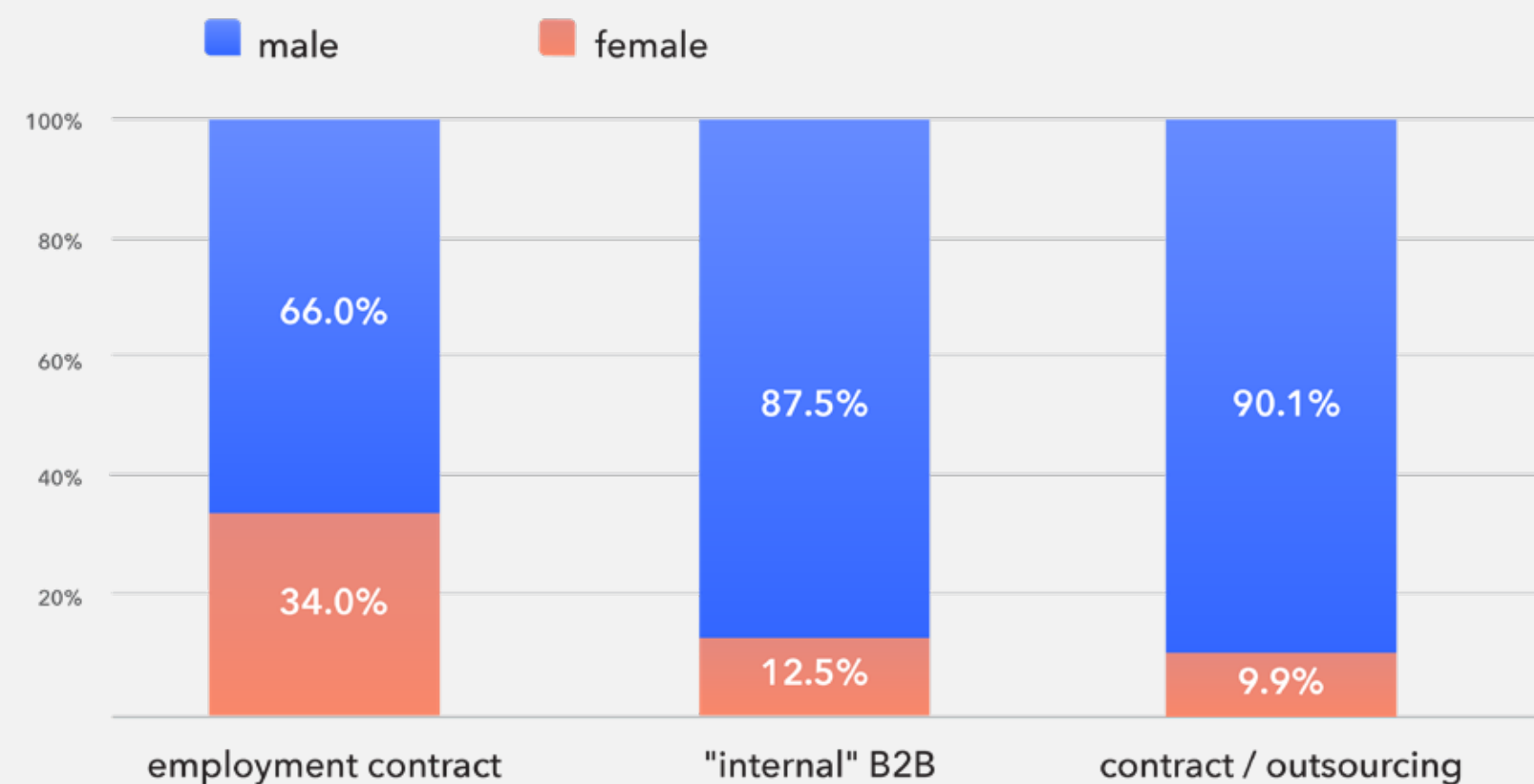
Source: Awarason study.

Seniority vs form of employment



Source: Awarson study.

Form of employment vs gender



Source: Awarson study.

expert comment

From the perspective of a freelancer who has been working on contracts for 15 years (previously about 8 years on a permanent contract), I would not change this form of work for any other. Globally, the choice of employment form depends on many factors, including:

- Psychological resilience to the instability of professional situations. An employee on a permanent contract always has a more stable and secure professional situation than a contractor. Personally, I have participated in a project where the client laid off the entire team of 150 consultants overnight. The employees of that company were covered by permanent employment contracts, so they

did not feel the change as much as I did. Some people find it difficult to cope with such situations, while others consider it a normal professional risk.

- Financial factors - A contractor earns more for the same work than an employee on a permanent contract (there are no such tax burdens and is not a constant financial burden for the employer). This is the reward for the risk.
- Independence and flexibility - A freelancer sets their own terms for onsite/remote work. They also have greater flexibility in choosing projects.
- Professional development - Here, an employee on a permanent contract definitely benefits, as they have access to training paid for by the employer. SAP knowledge is expensive. A freelancer has to self-educate.

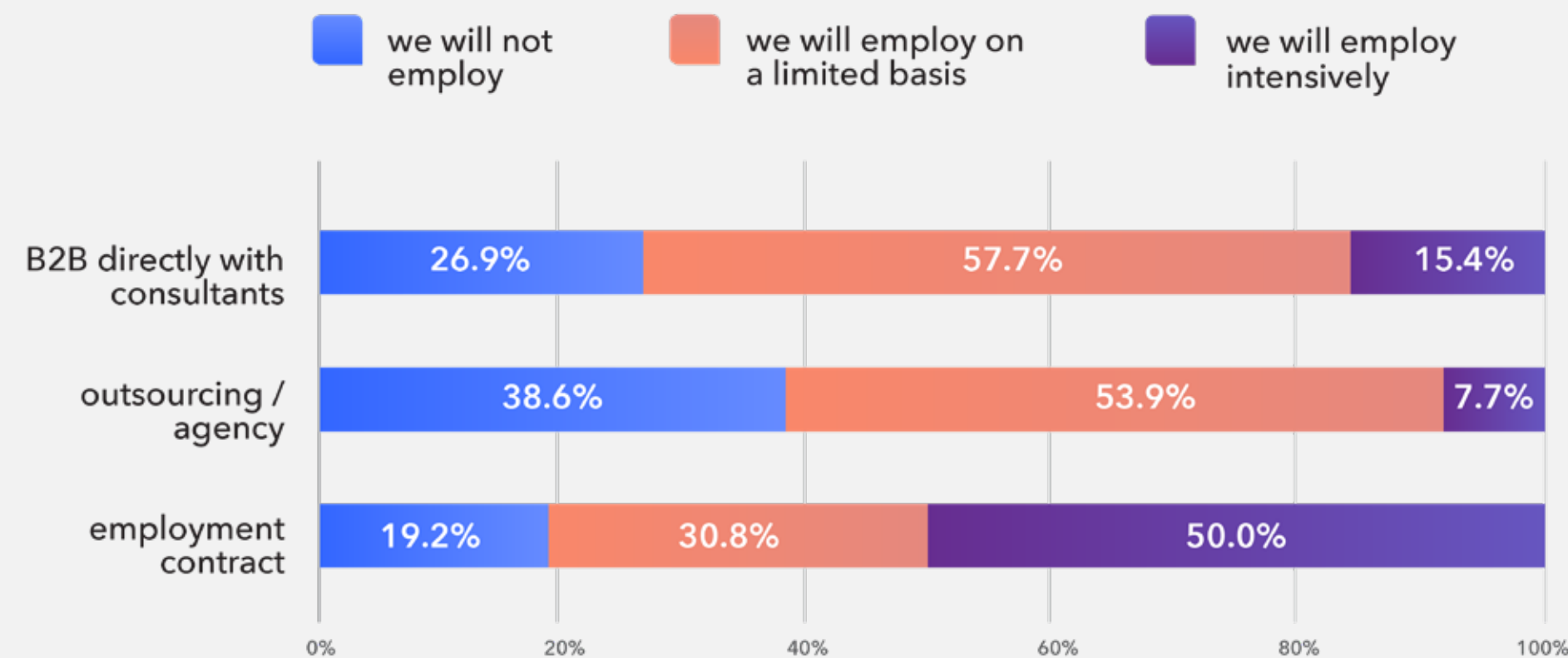
Grzegorz Majewski
SAP FI/CO Consultant at Awarson

Contracts are most commonly targeted for a year, which results from budget planning in companies and the fact that implementation and migration projects are usually long-term.

A significant 20% of respondents declare that they work for more than one company, which does not always mean simultaneously working on two or more projects. A substantial 54% of respondents are

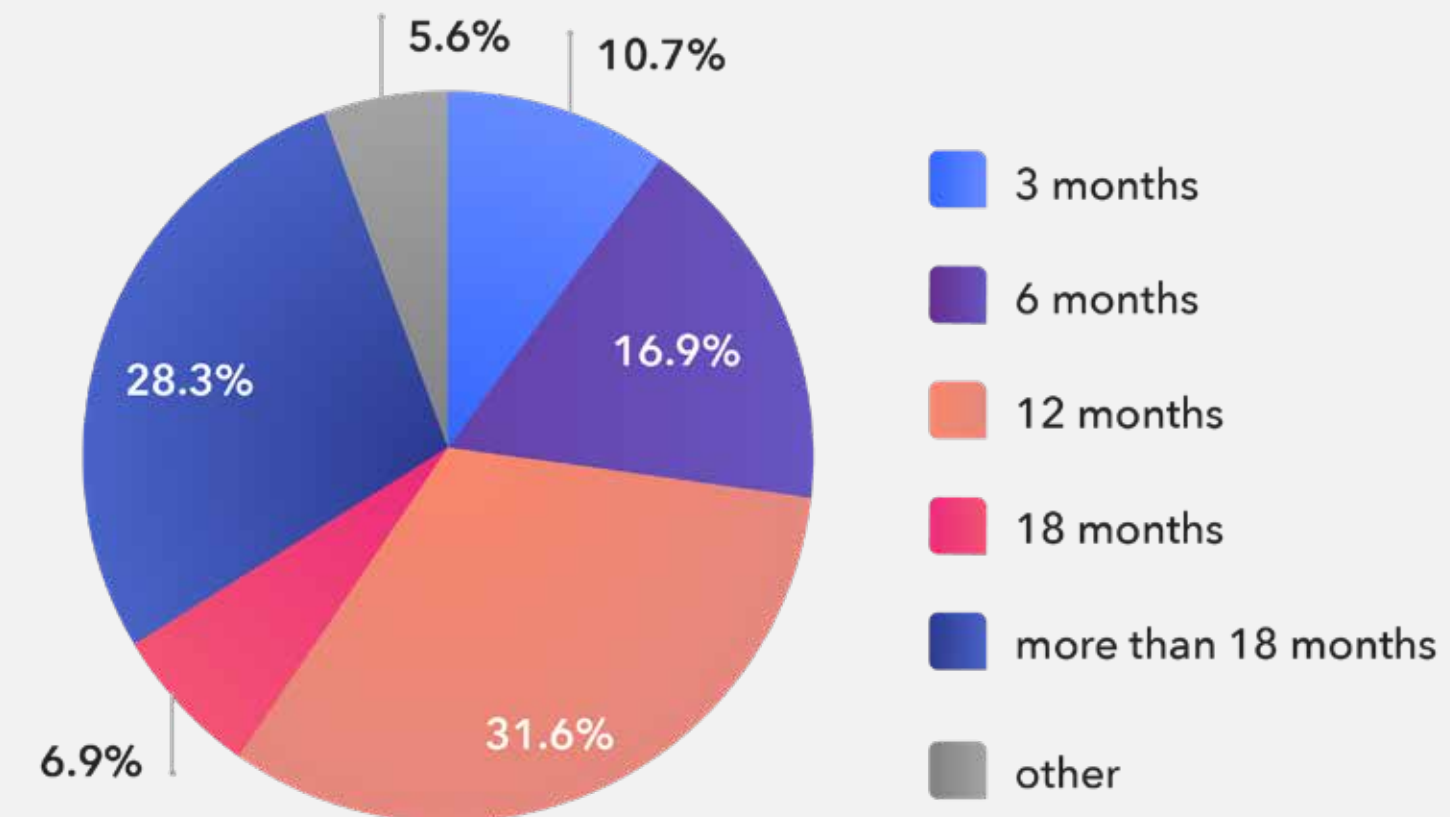
associated with consulting firms that carry out tasks for their clients, which somewhat automatically means co-operation with more than one entity. It is also common for experienced consultants to support several projects simultaneously, but within a limited time frame, such as a few hours per week. More than 40% of respondents work this way amongst experts.

Under which contracts will you employ SAP specialists?



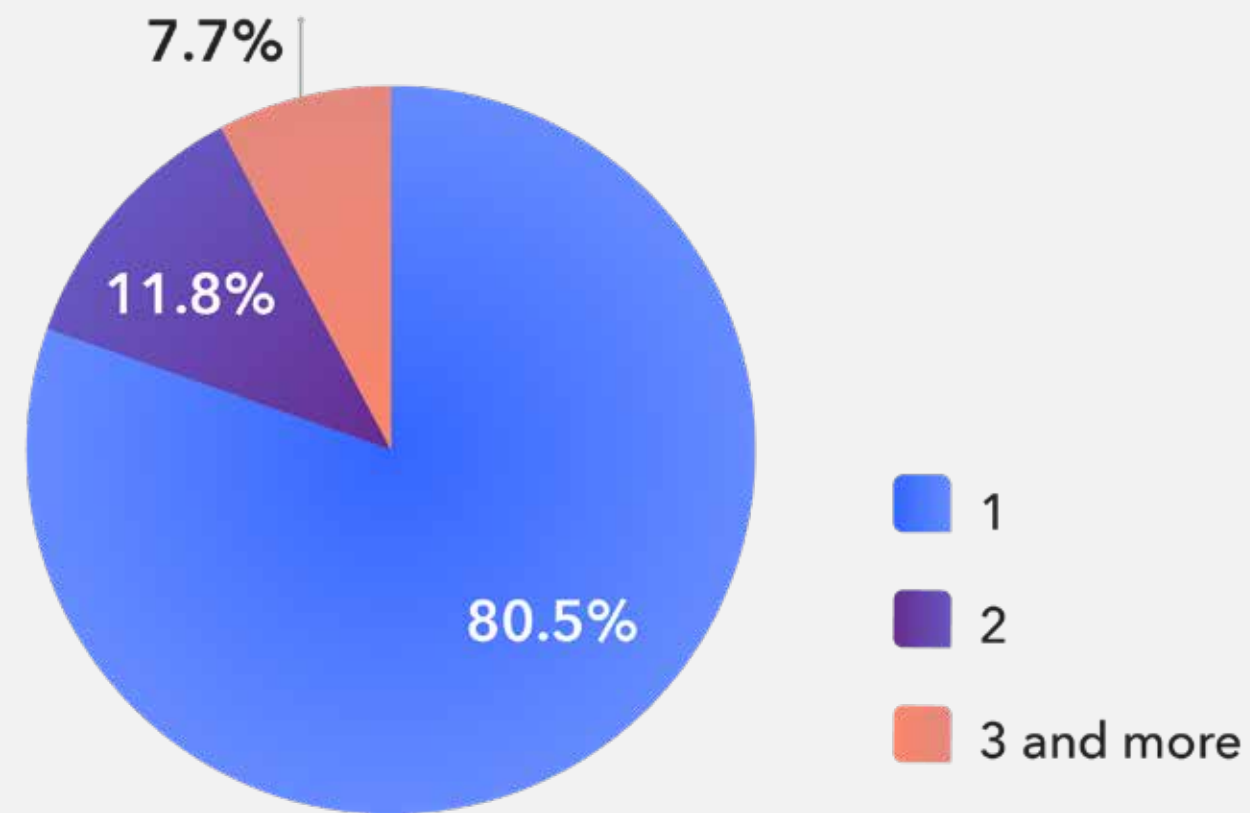
Source: Awarson study.

Length of current contract

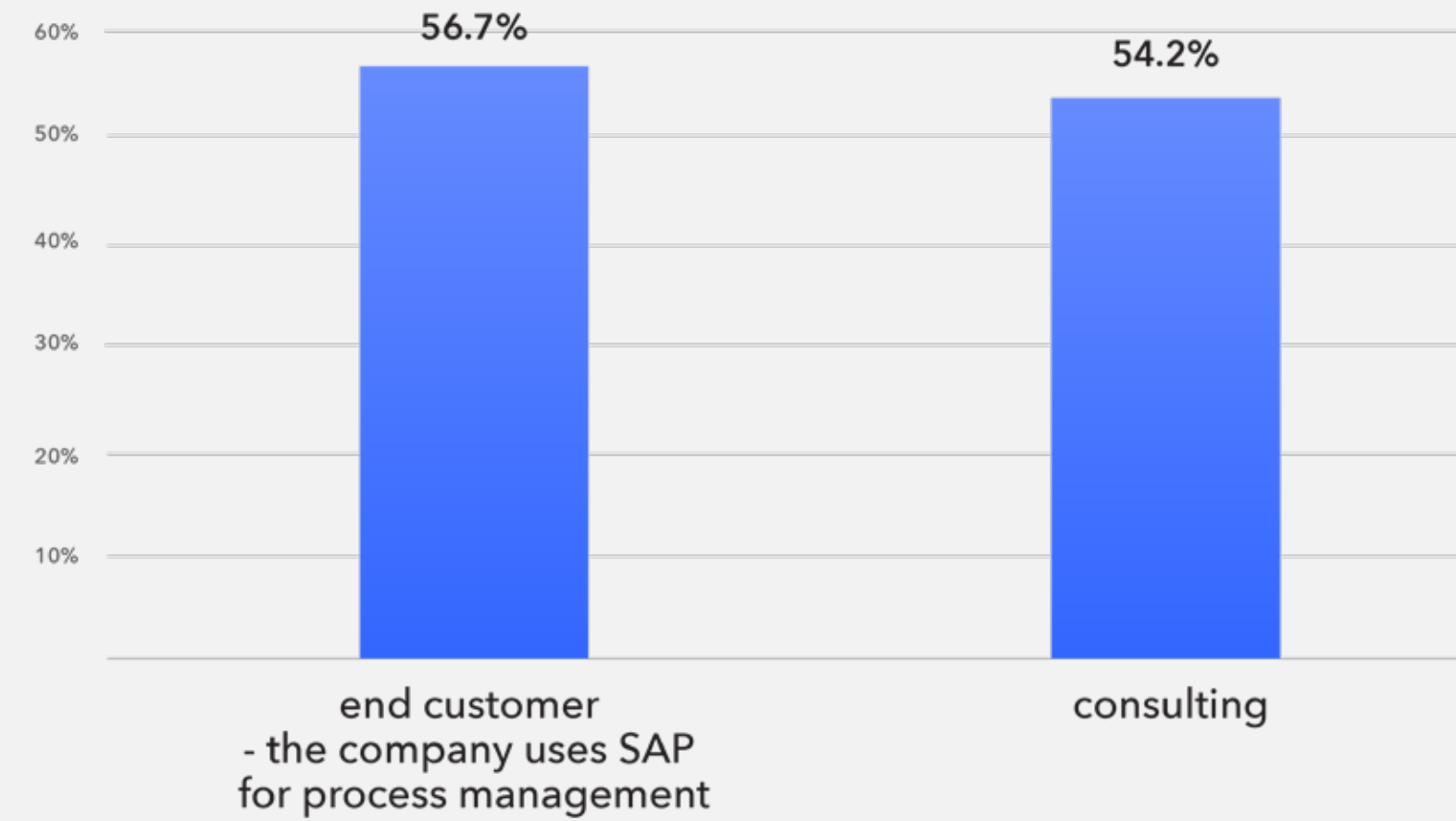


Source: Awarson study.

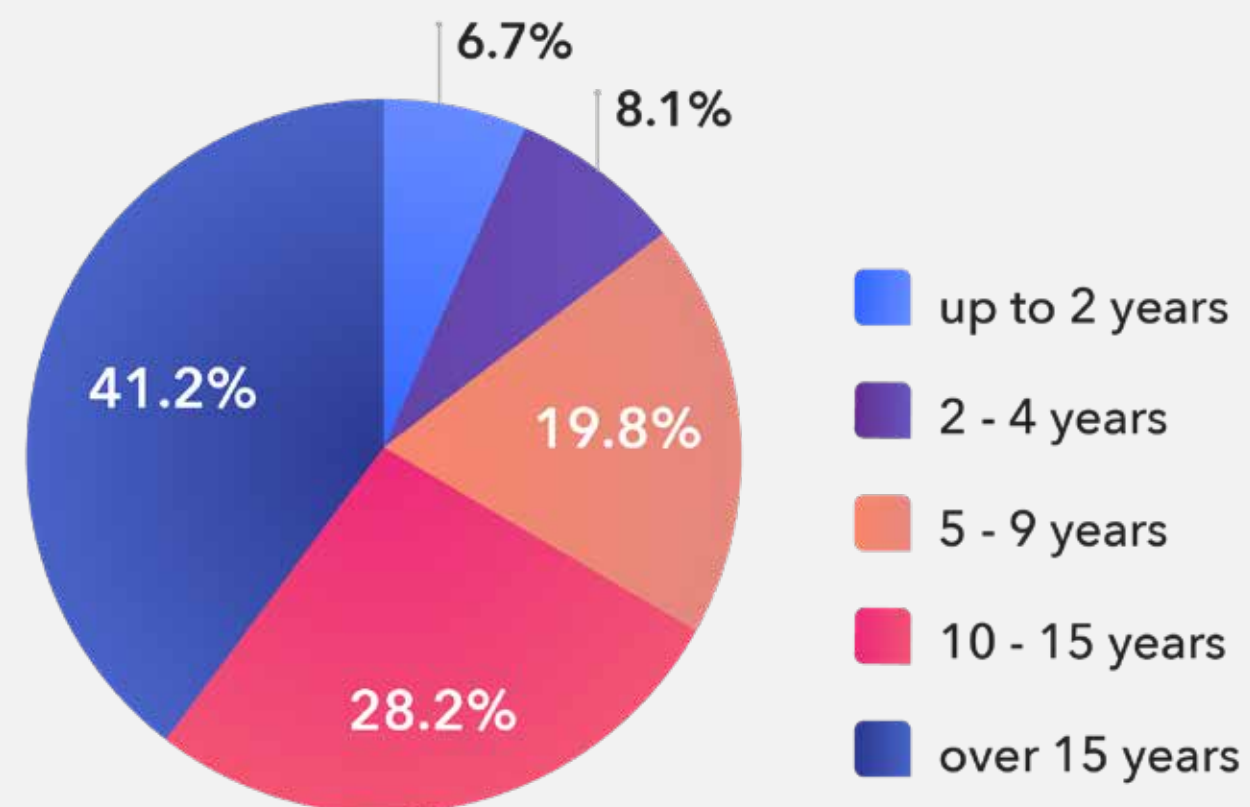
How many companies do you work for?



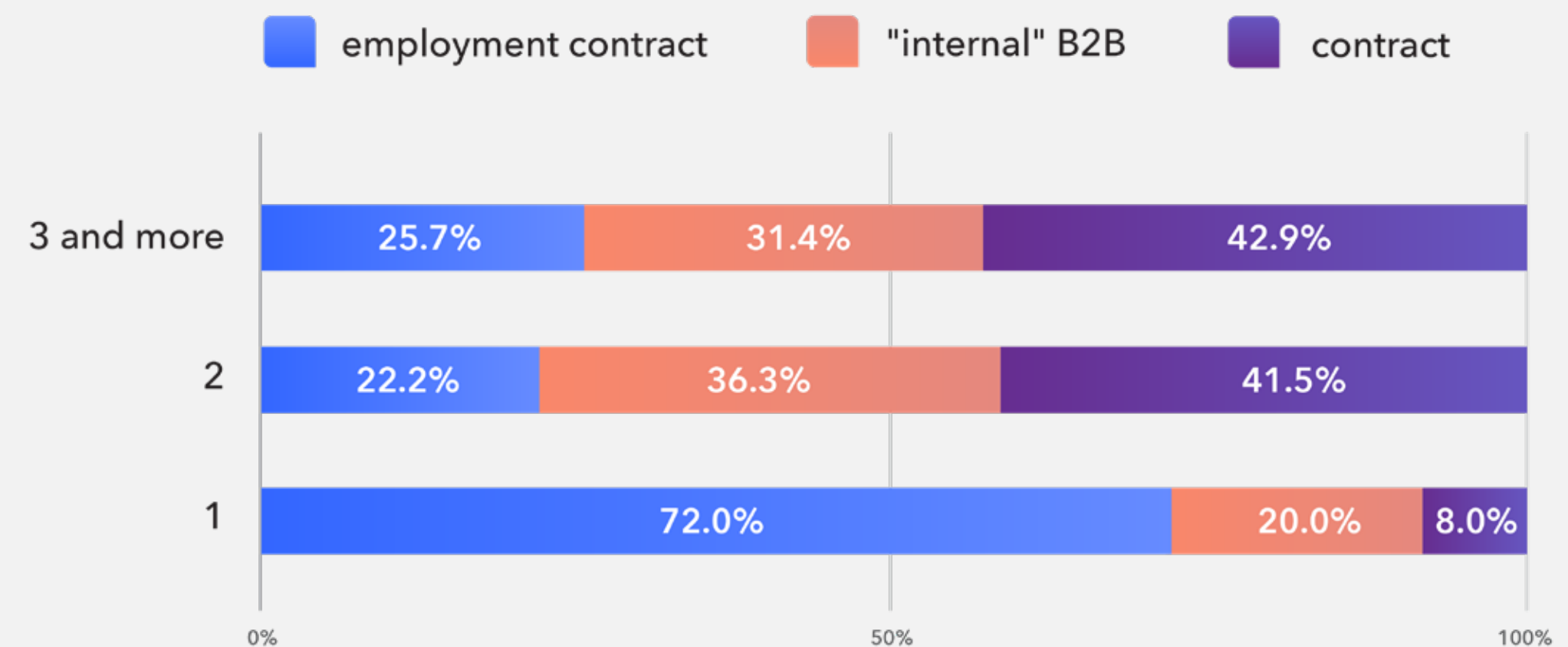
What type of company do you work for?



Multiple employers vs experience



Form of employment vs number of employers

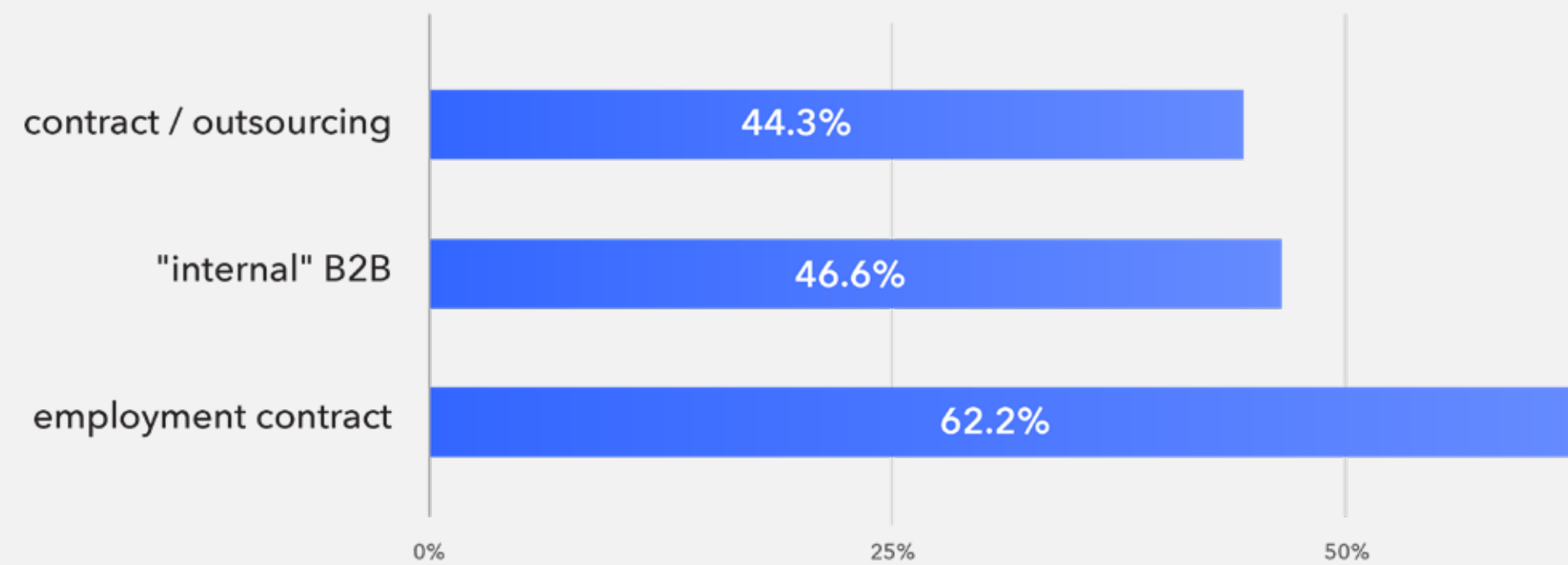


Source: Awarson study.

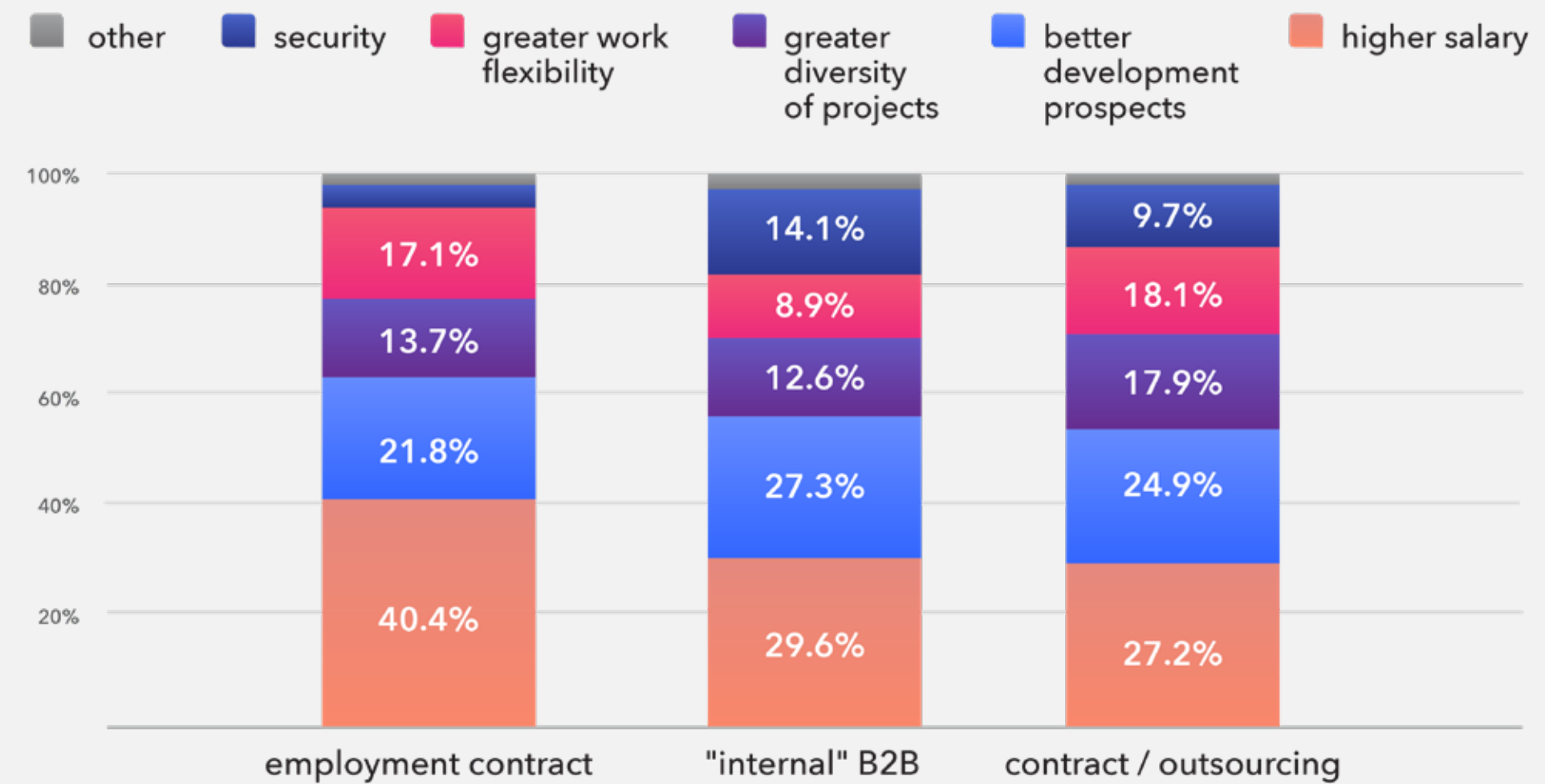
For a significant group of SAP specialists, the form of employment is secondary, so they declare an openness to change. This is particularly evident in the case of those employed under an employment contract, which

stems from the frequent choice of this form of employment by younger people. In any case, the dominant motivation is an increase in salary, followed by career development.

Openness to change of employment



Reasons for being open to a change in employment



Source: Awarson study.

Source: Awarson study.

05. Work Location

25%

of SAP specialists live in the Masovian Voivodeship

23%

of SAP specialists live in the Lower Silesian Voivodeship

53%

of SAP specialists work remotely 100% of the time

12%

of respondents want to work exclusively remotely

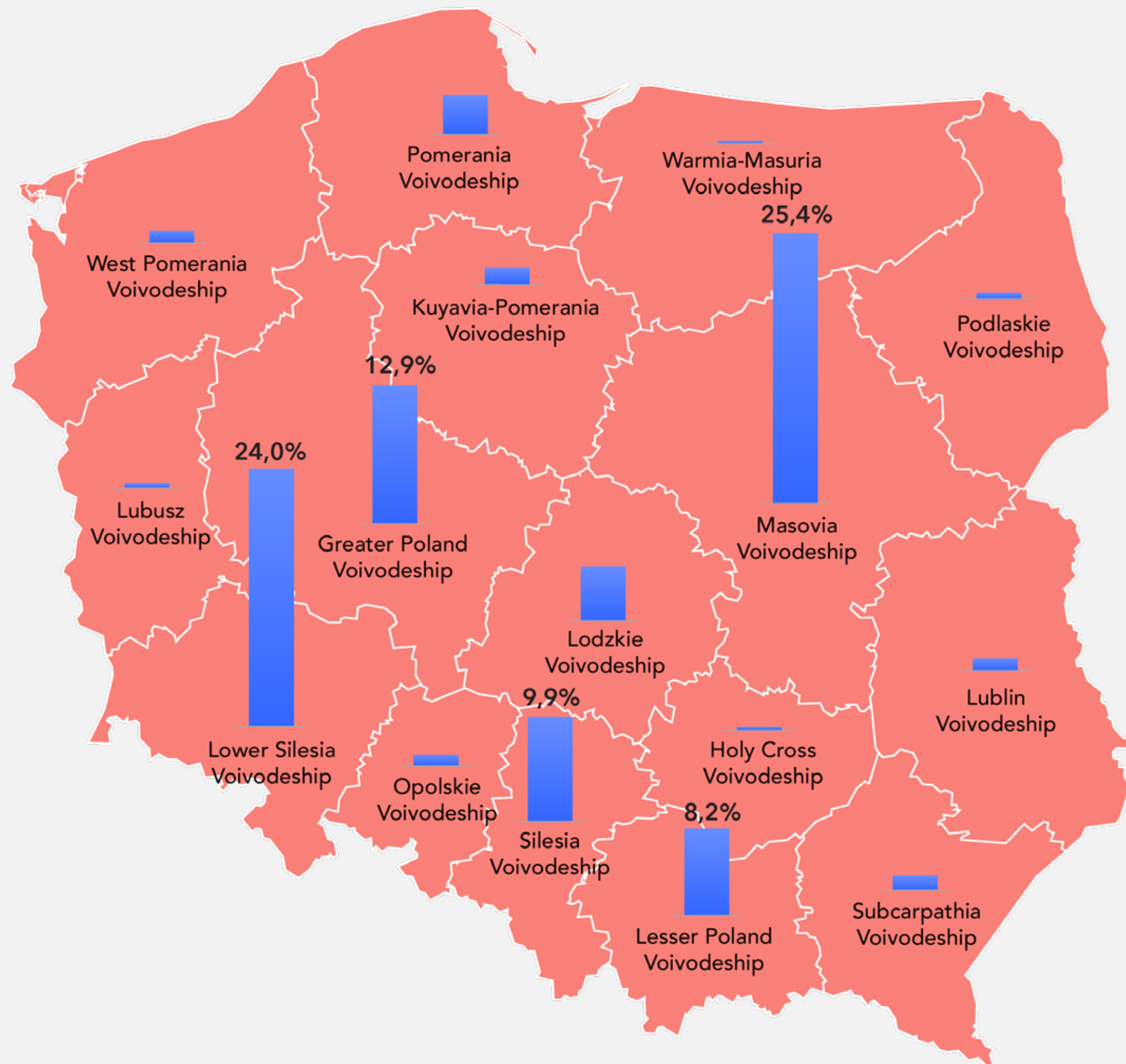
56%

of consultants execute contracts for foreign companies

37%

of foreign contracts are executed for companies from Germany

What province do you live in?



Source: Awarson study.

expert comment

More than half of SAP consultants declare that they work on foreign projects. In most cases, this is done through large consulting firms that have international teams, and “juggle” them, according to market needs. I do not perceive this interest in our consultants as a threat to companies in Poland. The number of SAP specialists is currently sufficient to meet demand. We also see an influx of consultants to Poland from other countries, especially Romania, Turkey, and Ukraine.

Foreign companies, more often than Polish ones, also require office work. This is a trend created by large technology companies with a strong brand that are able to impose their rules on employees. Smaller companies try to follow them, which does not always succeed. In Poland, I anticipate maintaining a compromise in the form of hybrid work with 2-3 days in

the office. In IT, many tasks can be efficiently performed remotely.

As for business trips, juniors and mid-level employees have no problem with them, as long as they are not too frequent. Seniors are less inclined to travel.

Robert Wasilewski

IT EUROPE / CESS

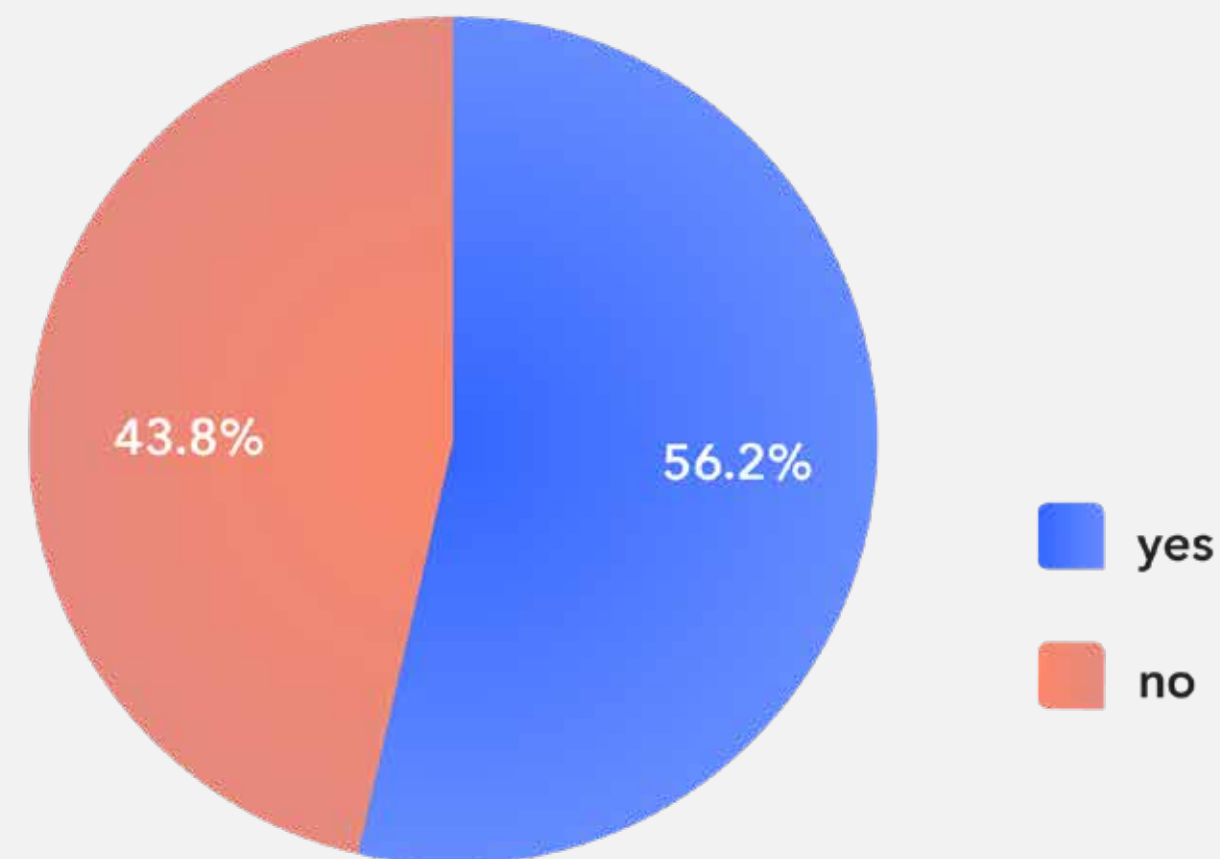
**Operations & Finance Service Delivery
Manager at L’Oreal**

Years of onsite work have led consultants to live and work in several main industrial centres in Poland, where the headquarters of Polish and international companies, as well as shared services centres, are located. Over half of the respondents indicate that they execute projects directly for foreign companies, mainly from the DACH countries, USA, Denmark, and the Netherlands. Most of them work through consulting and outsourcing firms,

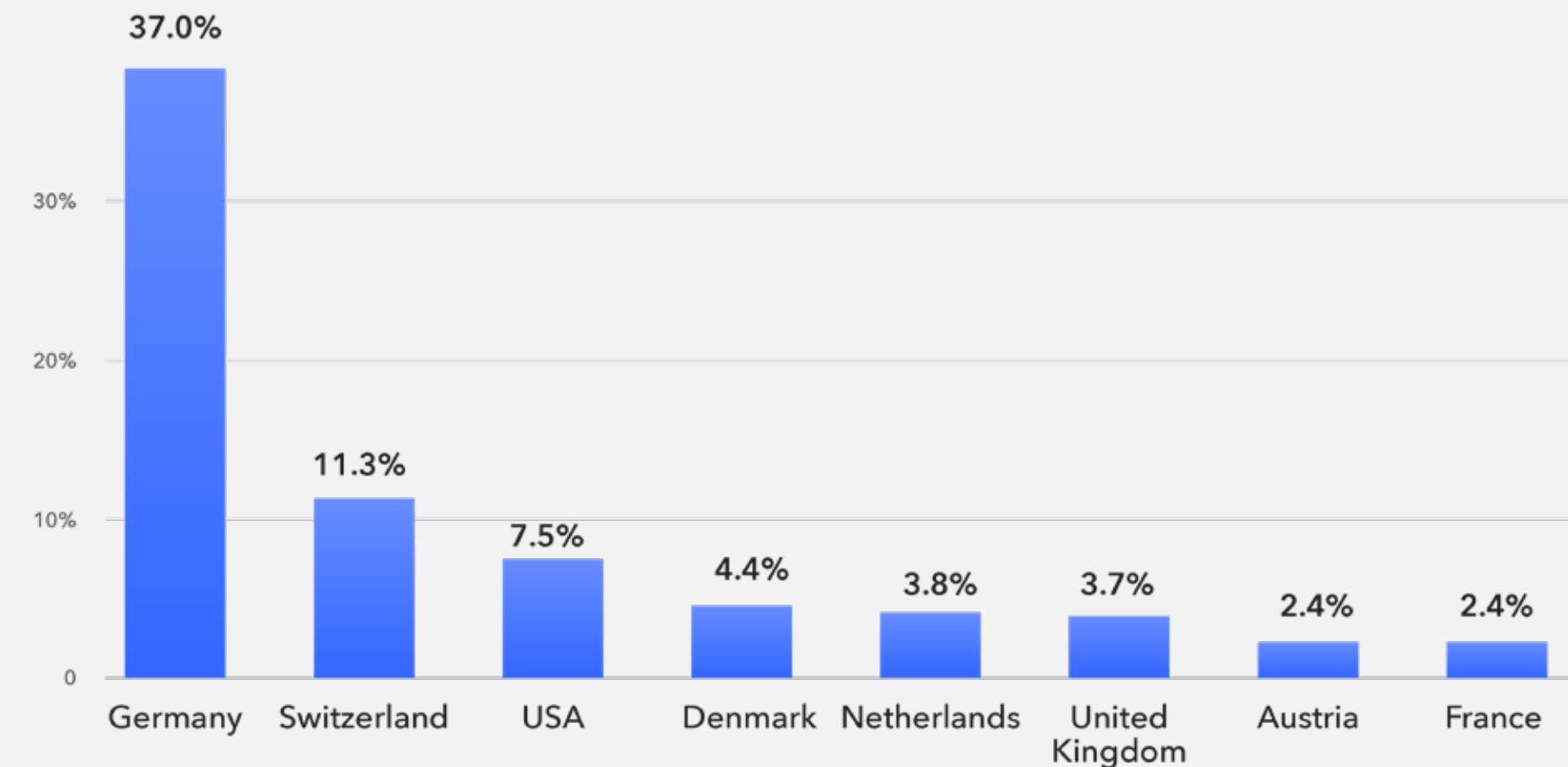
and less than 10% earn directly in foreign currencies.

The popularity of working for foreign companies, in addition to the high quality and cost availability of candidates from Poland, is also due to the pandemic. The ubiquity of remote work has encouraged companies outside Poland to seek support from our experts.

Do you carry out a project directly for a foreign company?



In which country is the company you work for based?



Source: Awarson study.

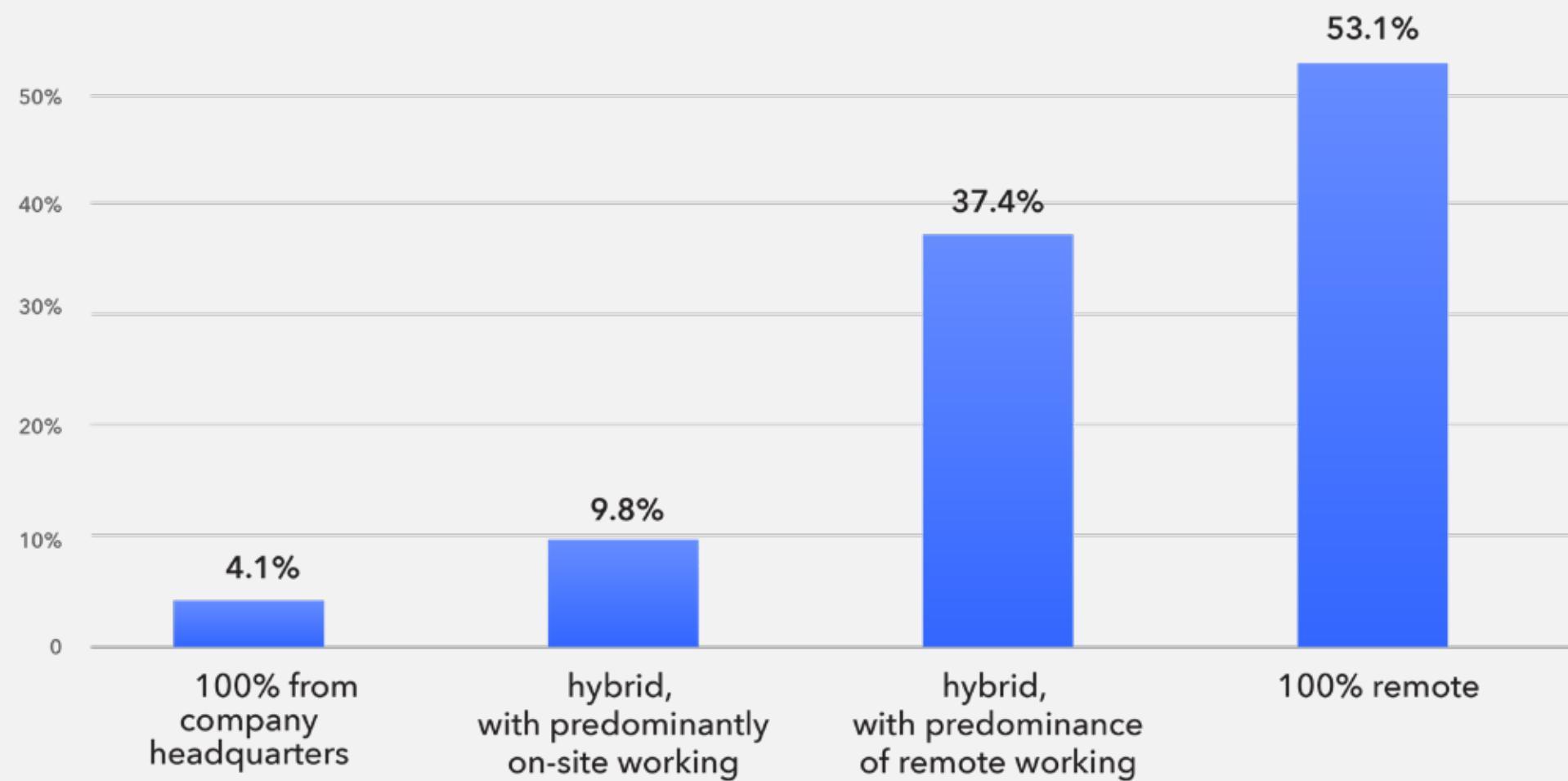
Source: Awarson study.

Currently, most consultants and developers work remotely, and only 4% of respondents perform tasks 100% from the company's premises. The longer the tenure, the greater the reluctance to work onsite, which stems, not only from comfort, but also from the involvement of experts in more than one project. Unfortunately, the popularity of remote work, as well as the multitude of duties of the most experienced specialists, makes it difficult to

transfer knowledge to juniors.

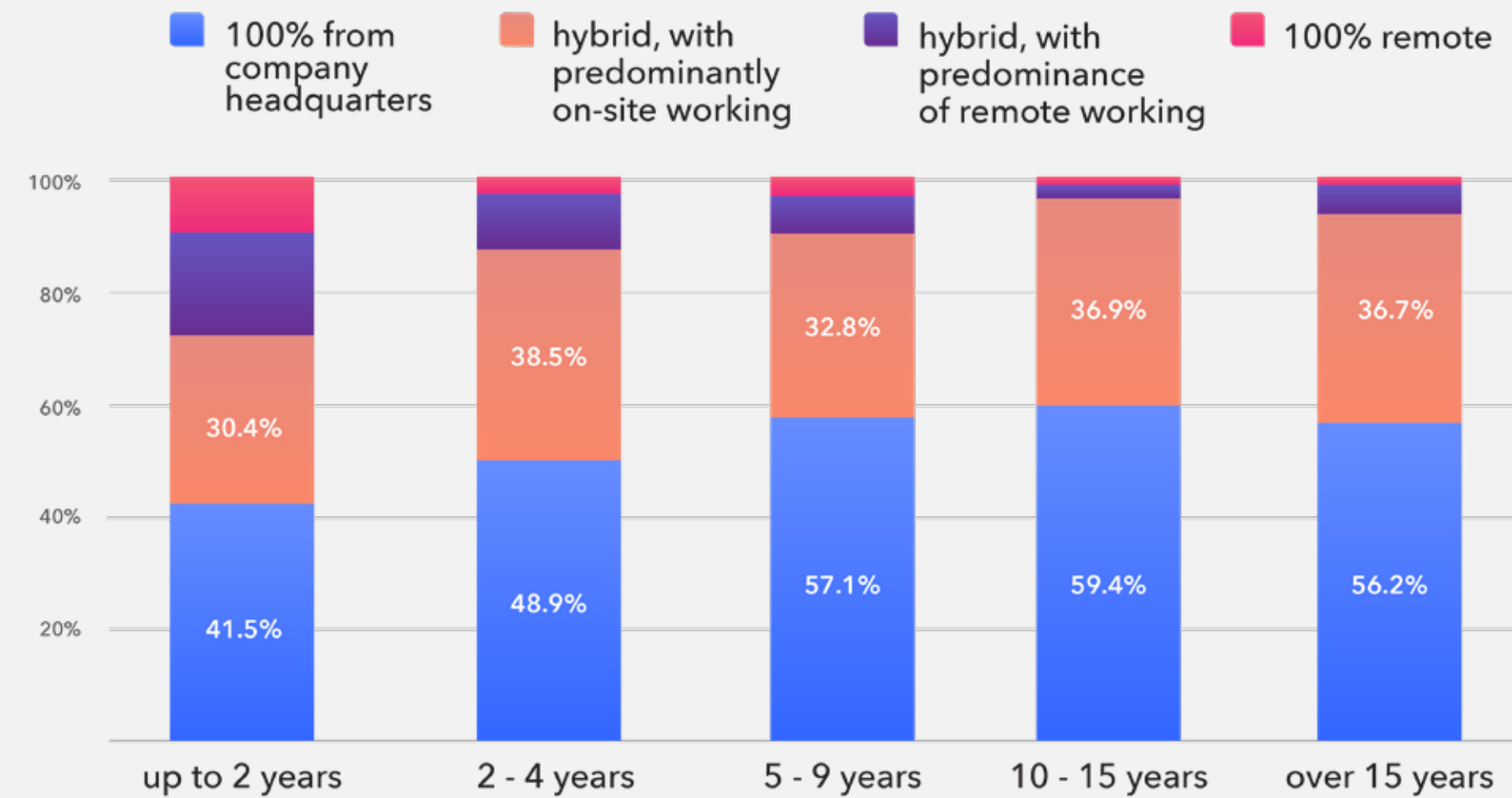
Openness to office work is slowly increasing. Almost three-quarters of respondents are willing to come to the company's premises at least 3 days a week. Just last year, such proposals were rejected by the majority of candidates.

Where do you work from?



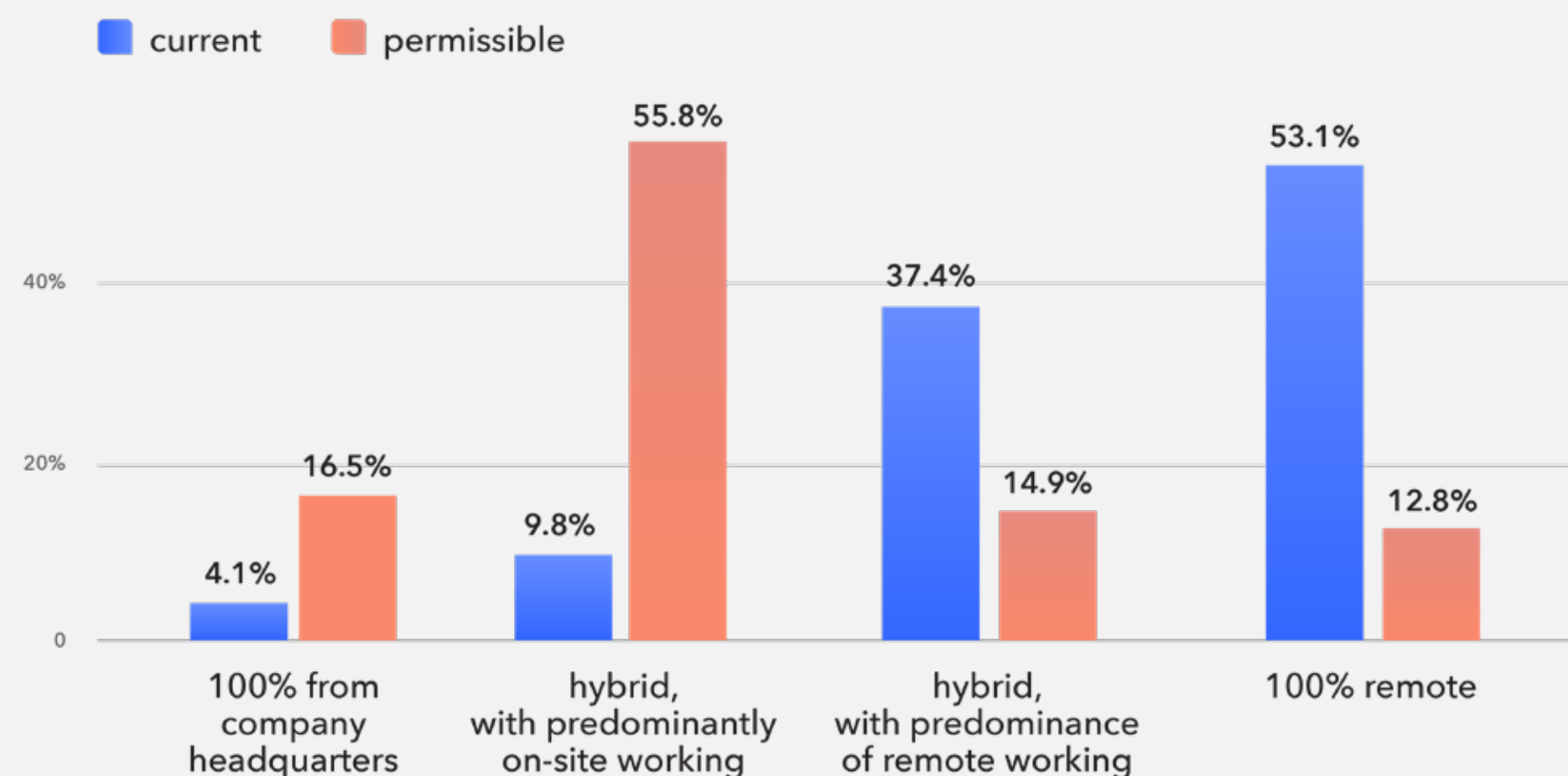
Source: Awarson study.

Place of work vs seniority



Source: Awarson study.

Current and maximum permissible number of days of work from the office



Source: Awarason study.

Travelling within projects is not as common as before the pandemic, but some companies still expect visits from the project team to factories and other parts of the company where SAP is being implemented.

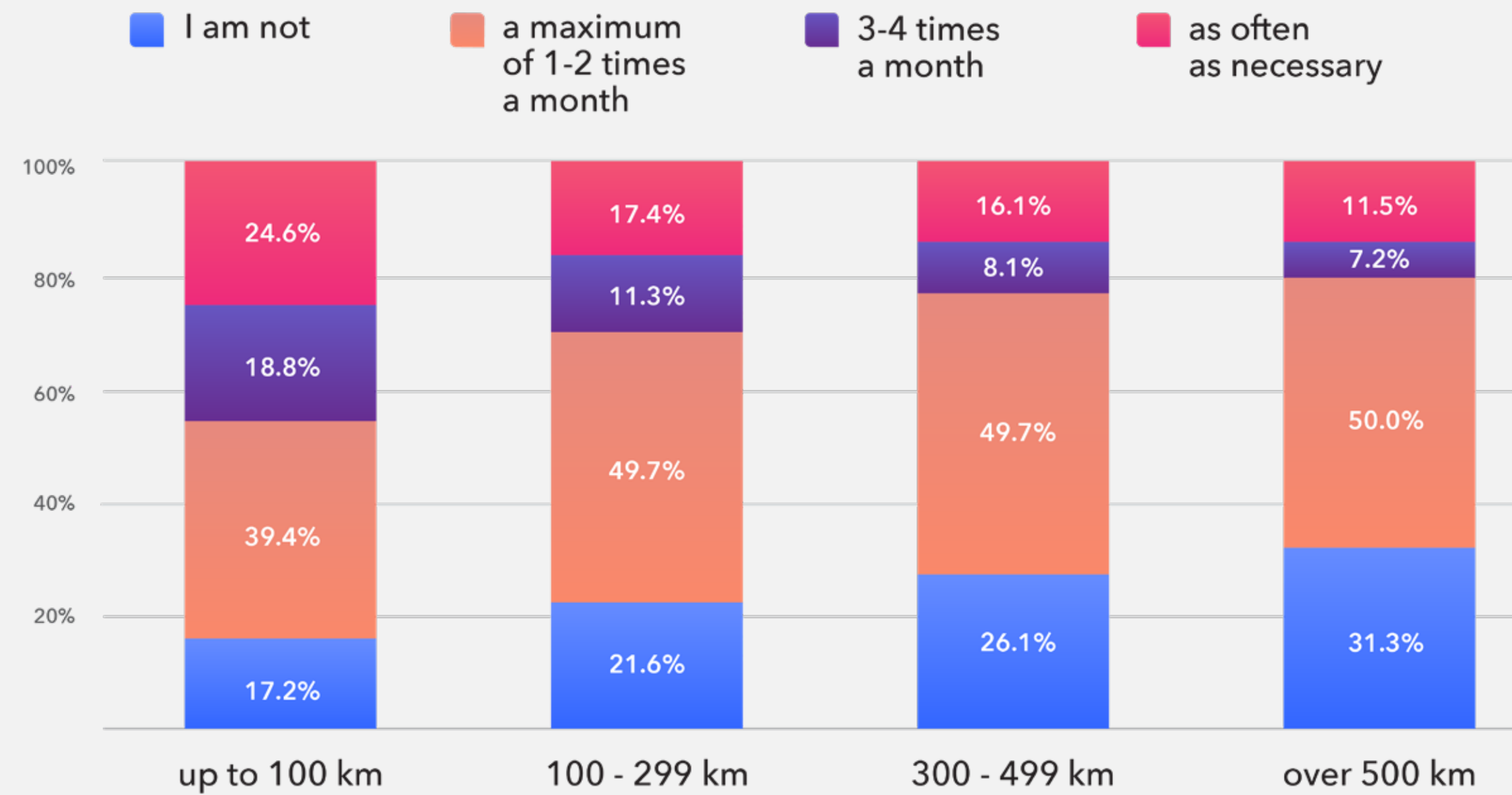
expert comment

Currently, our market relies on specialists who gained experience before the pandemic by working in large teams. They benefited from direct support and the practical knowledge of other specialists, and working in the office gave them the opportunity for experience exchange and mentoring. Now, such experts choose remote work. Meanwhile, the market still needs to train new personnel. Young people starting their professional careers are unfamiliar with teamwork in the same way as seniors. Sometimes, they have never seen members of their team, which makes it difficult for them to acquire knowledge and experience. For now, the market is based on "pre-COVID personnel," but over time, the lack of experience exchange may negatively impact the market. This is one reason why many foreign companies encourage employees to work from the office.

In Poland, compared to other countries, managers have greater freedom in organising work. Abroad, we also see a growing concentration of specialists around large urban areas or technological hubs. Data concerning Poland also shows 4-5 such clusters, but due to remote work, companies can still access talents from different regions.

Aleksandra Stachowiak-Klimek
Regional IT Manager for Finance & Legal
EUR at Nestle

Willingness to pore over



Source: Awarason study.

About 80% of consultants are willing to travel regularly - frequency is key, not distance. Half of the respondents declared a willingness to visit clients 1-2 times a month, and 1/5 as often as required.

06. Turnover and Work Motivation

28%

of SAP specialists changed jobs last year

44%

of SAP contractors changed jobs last year

in 77%

of cases, it was the employee's decision

49%

of respondents do not know if they will change employers in 2024

for 72%

of candidates, salary is the key motivation for change

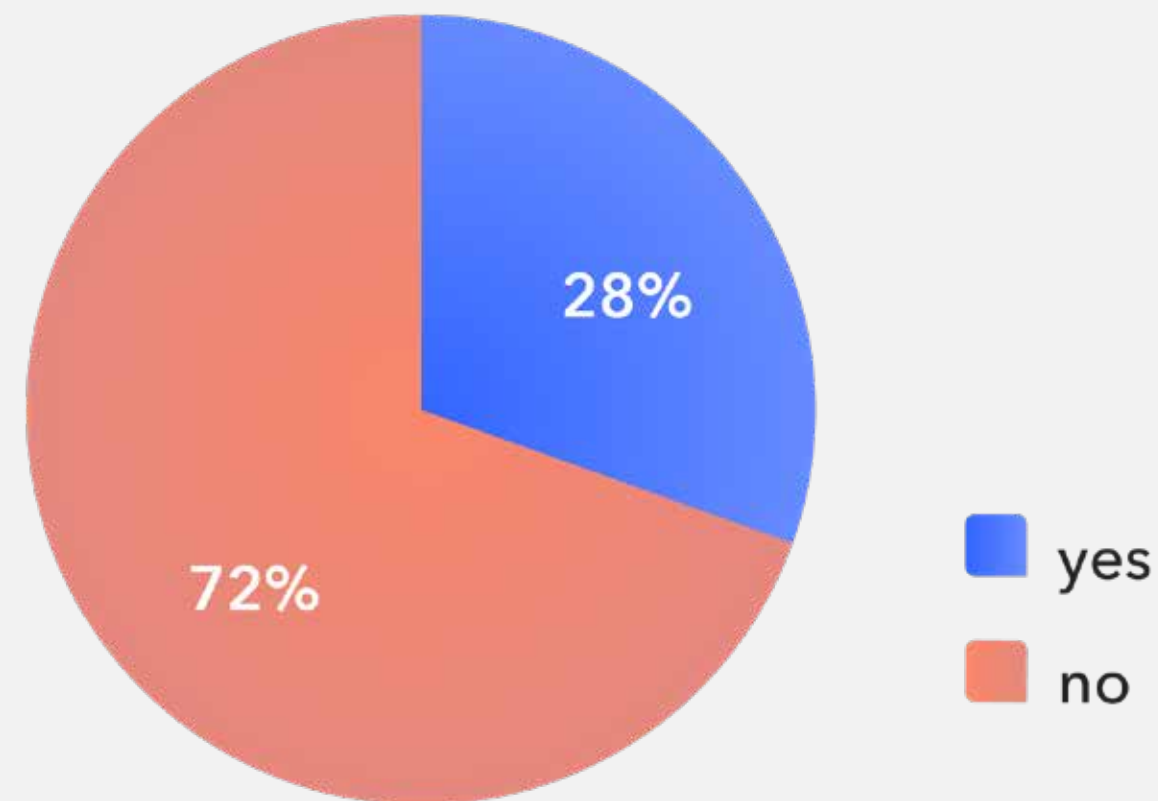
for 47%

the main motivation to stay in the company is remote work

Turnover remains one of the key challenges in the labour market. According to Gallup, globally, 51% of respondents plan to change jobs in 2024, while in Europe, this percentage is 34%. This problem also affects Poland, including the IT job market. In 2023, over 28% of SAP specialists

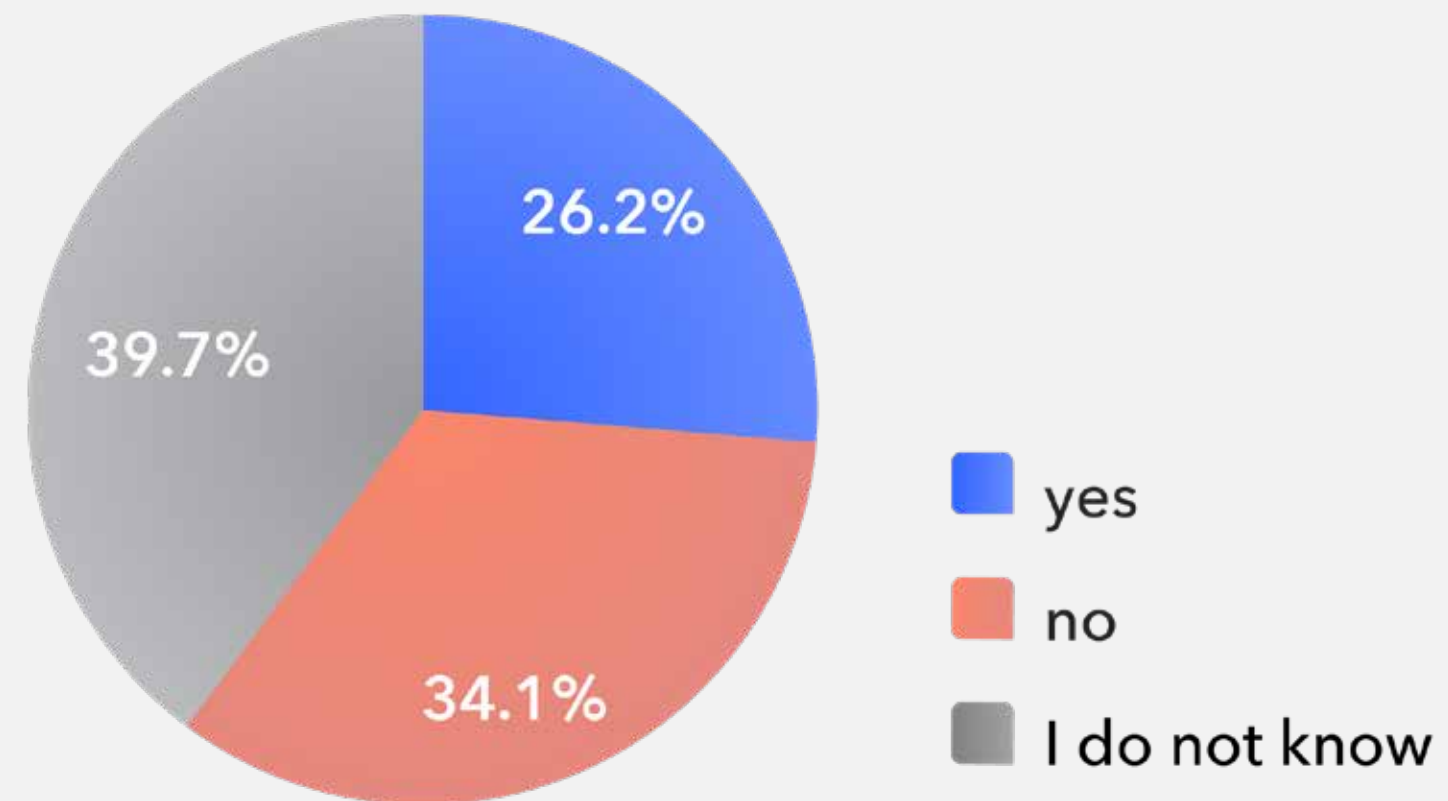
changed jobs, which is consistent with their declarations from the previous year. The relatively low turnover is a consequence of previous years. At the end of the pandemic, the propensity to change jobs in IT was record-breaking, which naturally reduced turnover in the following period.

Have you changed job in the last 12 months?



Source: Awarson study.

Declarations of potential job change one year earlier



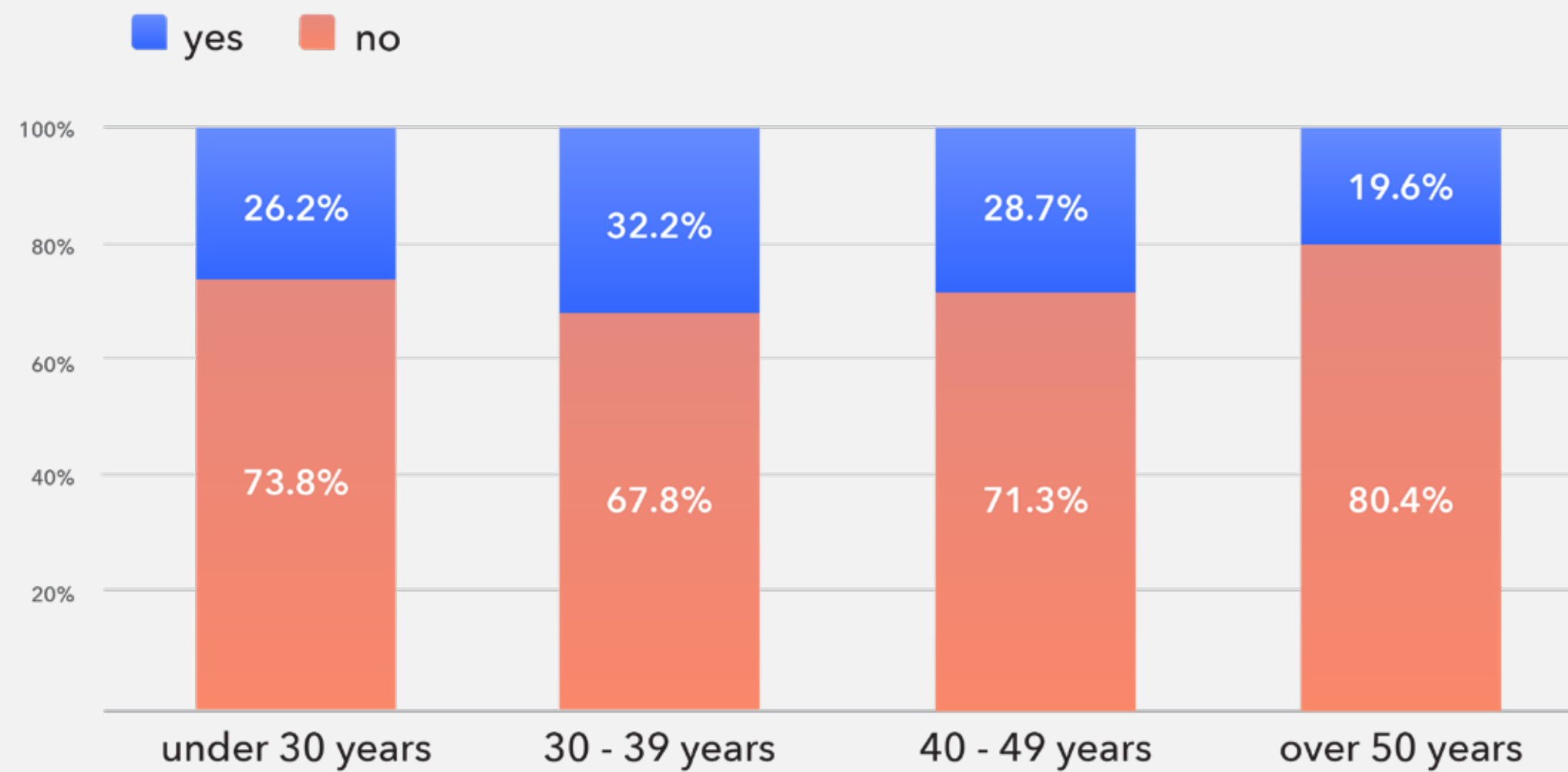
Source: Awarson study.

What definitely distinguishes the SAP job market from others is the minimal correlation between age and turnover. In the under-30 age group, this indicator can be twice as high when compared with employees aged 50 and older. In the case of SAP, the differences are minimal, indicating a high demand for skills in every age group.

It is often consultants, not employers, who decide to end co-operation,

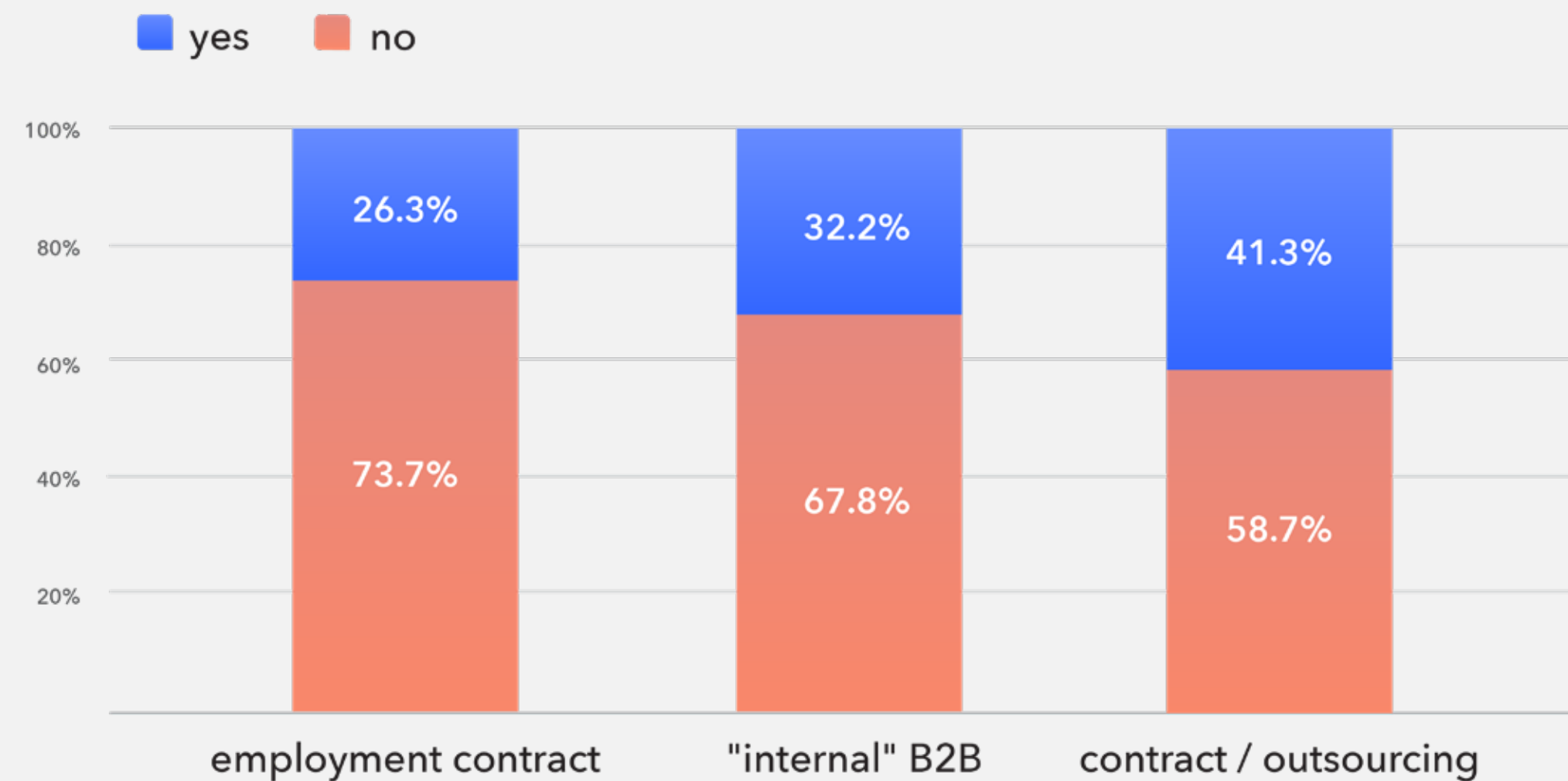
which clearly indicates a so-called employee market. Traditionally, permanent employment binds specialists to a company more strongly than other forms of employment, although considering that in the case of outsourcing, the end of the project is often the reason, this is not a significant difference. It is also evident that permanent employment does not protect against dismissal more than other types of contracts.

Change in employment in the last 12 months vs age



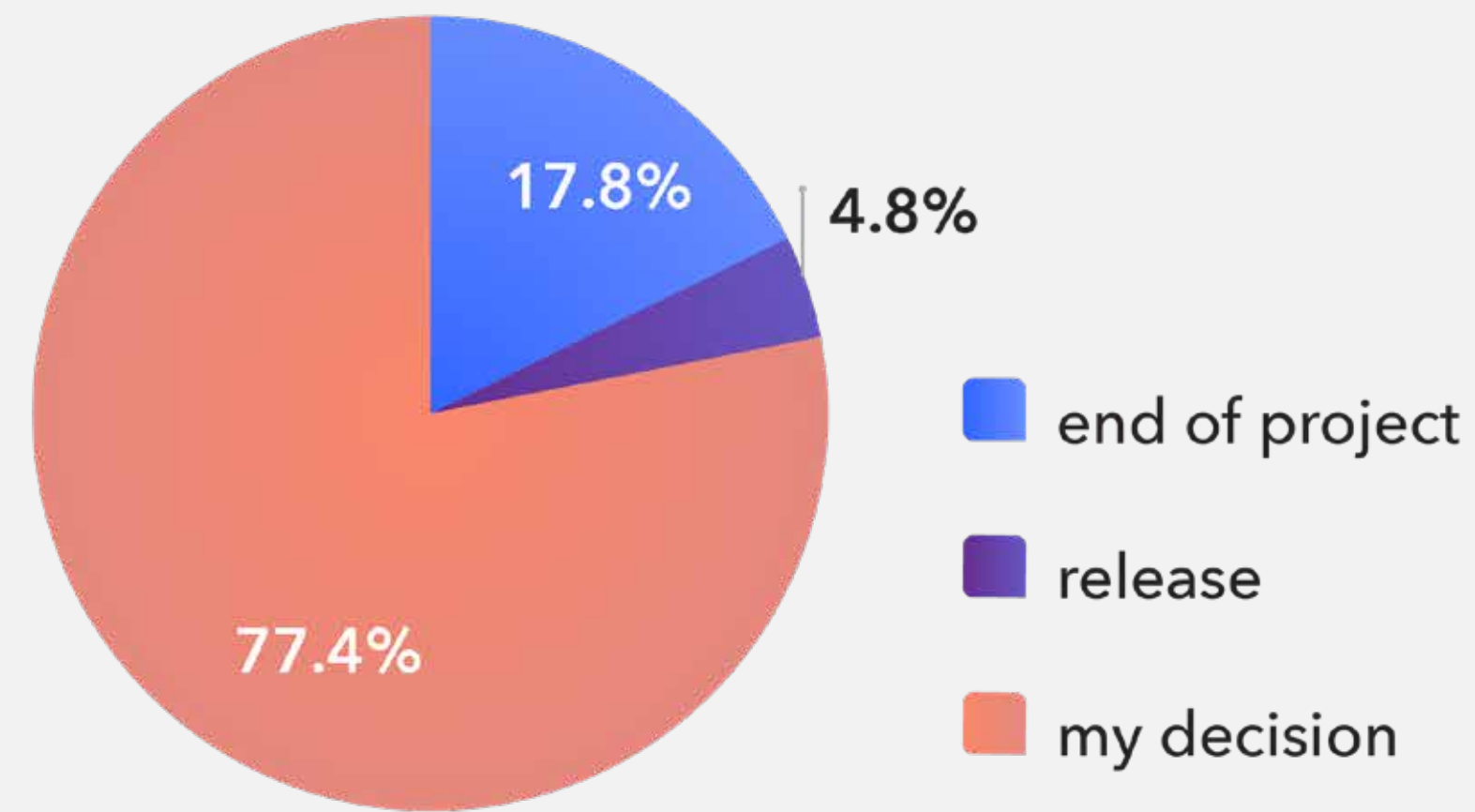
Source: Awarson study.

Rotation vs form of employment



Source: Awarson study.

Reason for job change in the last 12 months



Source: Awarson study.

The reasons for job changes by consultants and developers have remained unchanged for several years: it is practically equal between money and development. Specialists are not afraid of losing their jobs, which is not surprising given the high demand for their skills. They also do not feel the need for advancement.



Data collected from SAP specialists shows an increasing uncertainty regarding potential job changes. Half of the respondents do not know if they will be taking on a new challenge this year. In my opinion, this is a consequence of events in recent years. We are tired of the pandemic, war, inflation, and economic slowdown. On one hand, for economic reasons, more candidates than last year are seeking employment, but on the other hand, they are not making a final decision to change. They are exploring the market and realising that where they are employed, might not be so bad after all. This is confirmed by my practical observations of the market and the growing number of rejected offers.

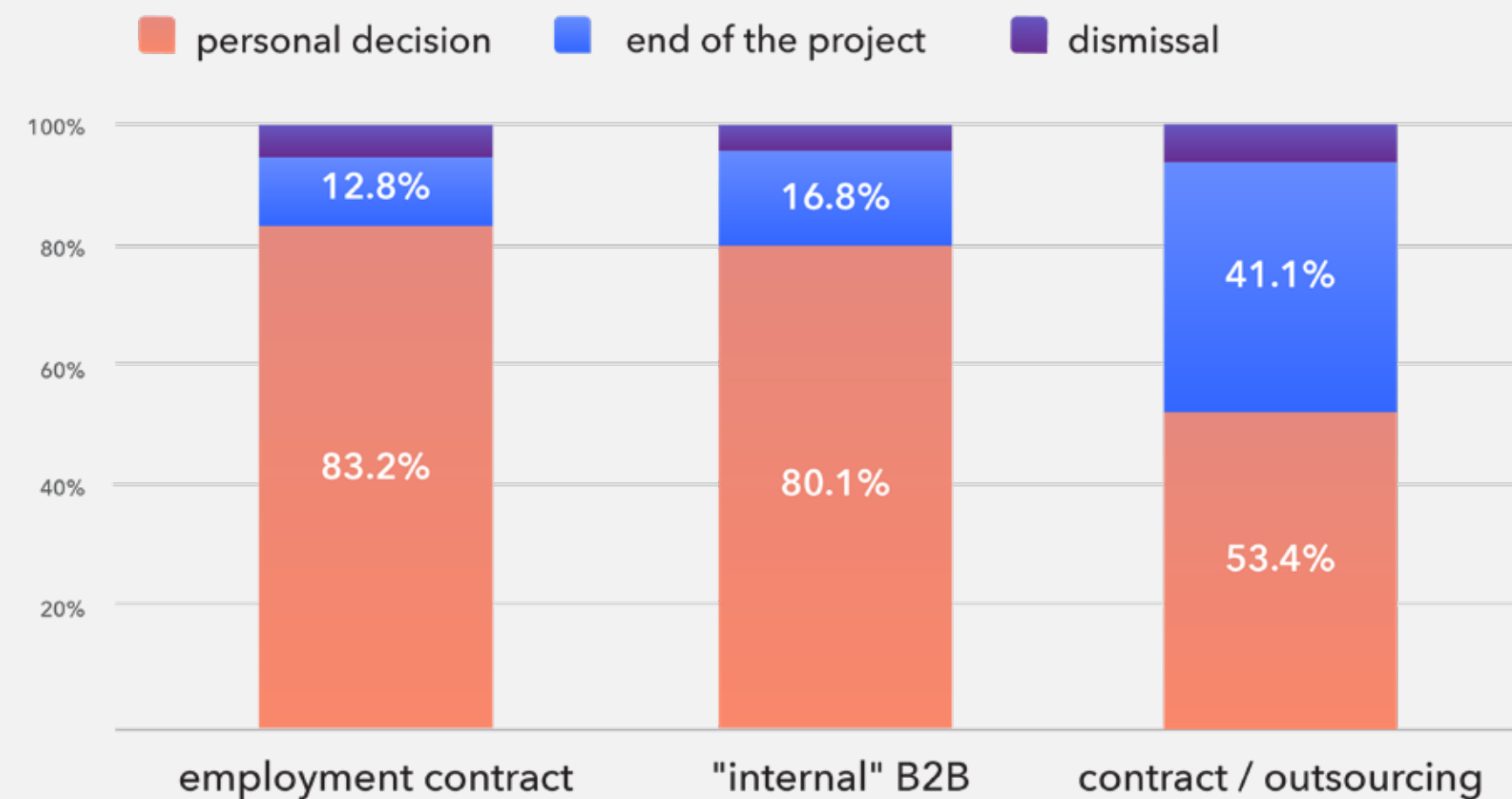
Candidates sometimes go through 3-stage recruitment processes, only to ultimately decline an offer that meets all their requirements. This suggests that they are driven by curiosity, and the decision is influenced by fear of the future, but they do not decide to change because the benefits of taking the risk are not sufficient.

We also see that permanent employment still binds candidates to the company more than other forms of employment. Besides the obvious fact that in the case of outsourcing, some turnover simply results from the end of the project, it is evident that collaboration based on "fully-fledged employment, on fully-fledged terms" is better cared for in terms of long-term development. Matching a candidate to a company is more precise, more restrictive, and takes into account the plans of both parties.

Marta Prudel-Hankus

Head of Perm at Awarson

Reason for change of job vs form of employment



Source: Awarason study.

A few years ago, the desire for advancement was a significant reason for changing jobs, but today, what matters is gaining practical knowledge and deepening expertise in a specific area. The concept of being an outstanding specialist, not a leader, is the main professional goal of this group.



Both in the case of plans and actual decisions of employees, we have two key arguments: salary and development. However, in the case of declarations, salary is indicated much more frequently. SAP specialists have become accustomed to significant salary increases in previous years, and if these increases have been insufficient lately, due to the economic situation, they express a willingness to change. However, during their search, the market verifies their expectations, and ultimately, financial motivation does not play as significant a role.

Data also shows that in employees' perceptions, permanent employment does not guarantee security. On the other hand,

advancement is perceived as additional responsibilities that do not translate into higher earnings as much as deepening technical knowledge.

Remote work, on the other hand, is an important reason for staying with the company longer. Rates in different companies are similar to each other. It is precisely the potential for development and the opportunity for remote work that can be bargaining chips.

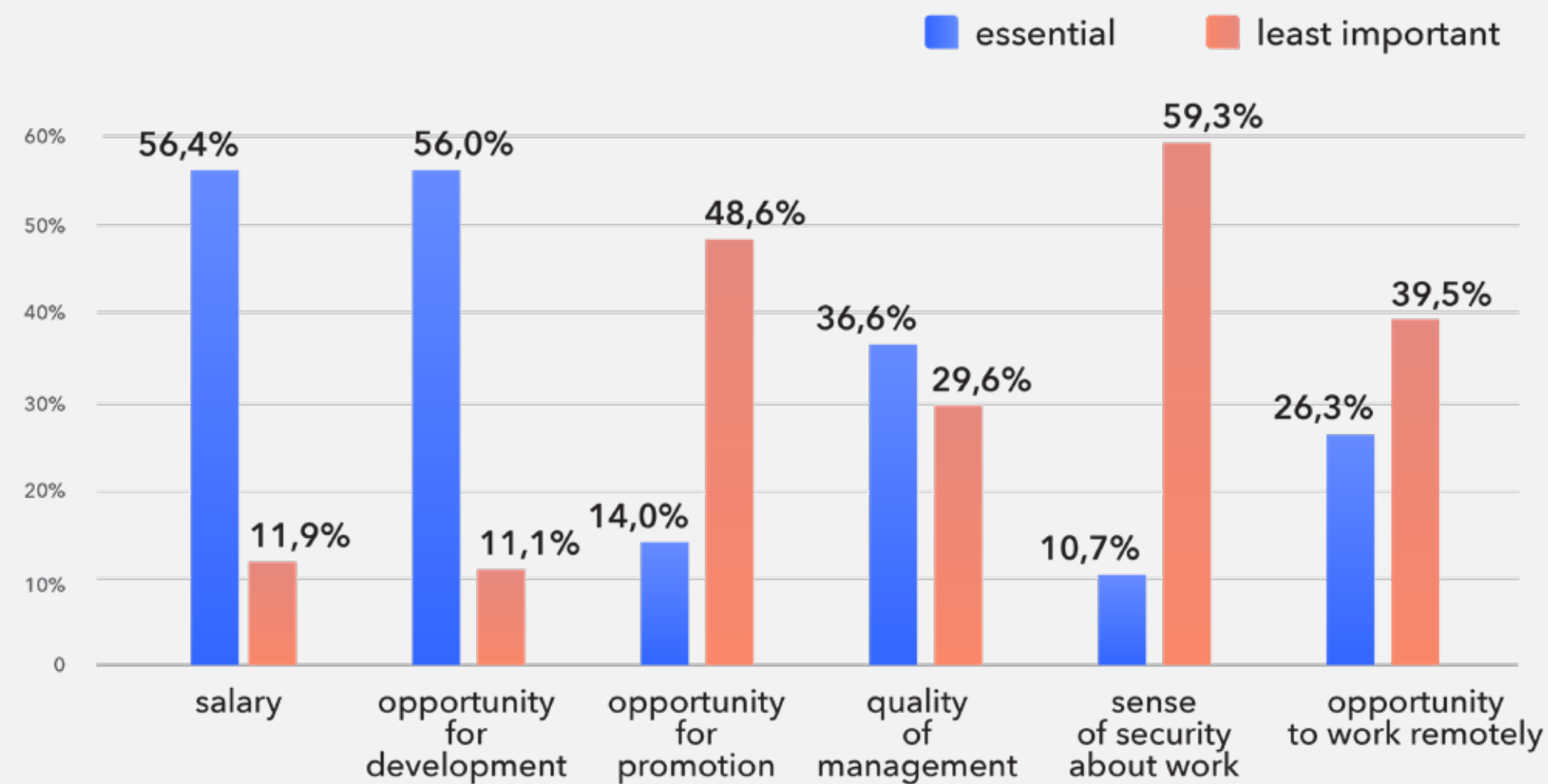
In the context of turnover, an important piece of information is that mature employees apparently have no problem finding new employment. Competencies are in demand. This is positive news.

Przemysław Ostrowski

Head of Data & Analytics, Ørsted

What awaits the market in 2024? The declared willingness to change jobs is increasing, which is natural after a year of relative stagnation. Indecisiveness is significantly increasing - half of the respondents do not have clear career plans for this year.

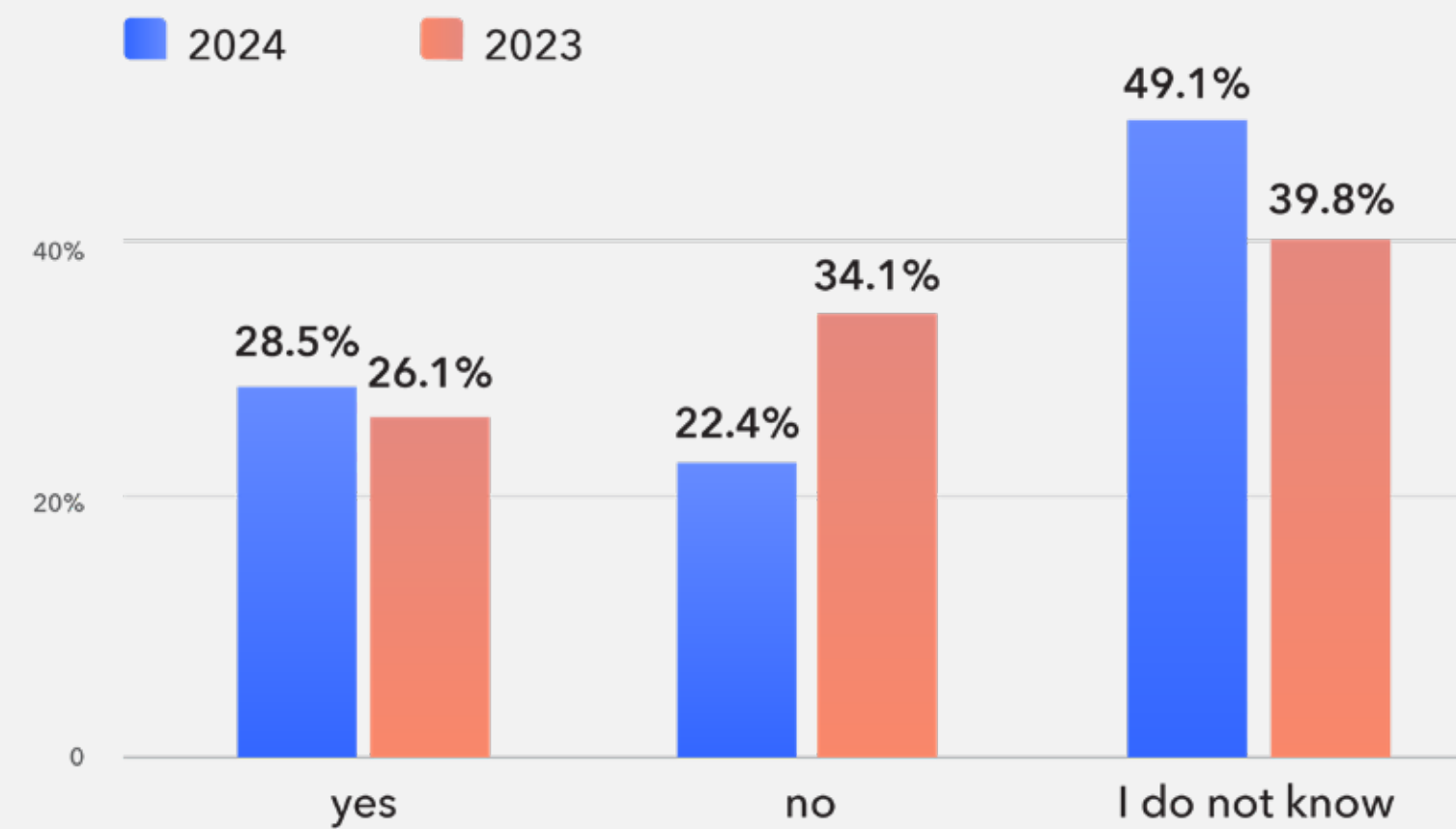
Reason for job change in the last 12 months



Source: Awarason study.

In terms of job changes in the previous 12 months, salary and development had essentially the same significance, and when expressing a desire to leave, money seemed crucial. One reason is inflation, and another, perhaps more significant reason, is that the market effectively verifies candidates' financial expectations.

Are you planning to change your job in the next 12 months ?



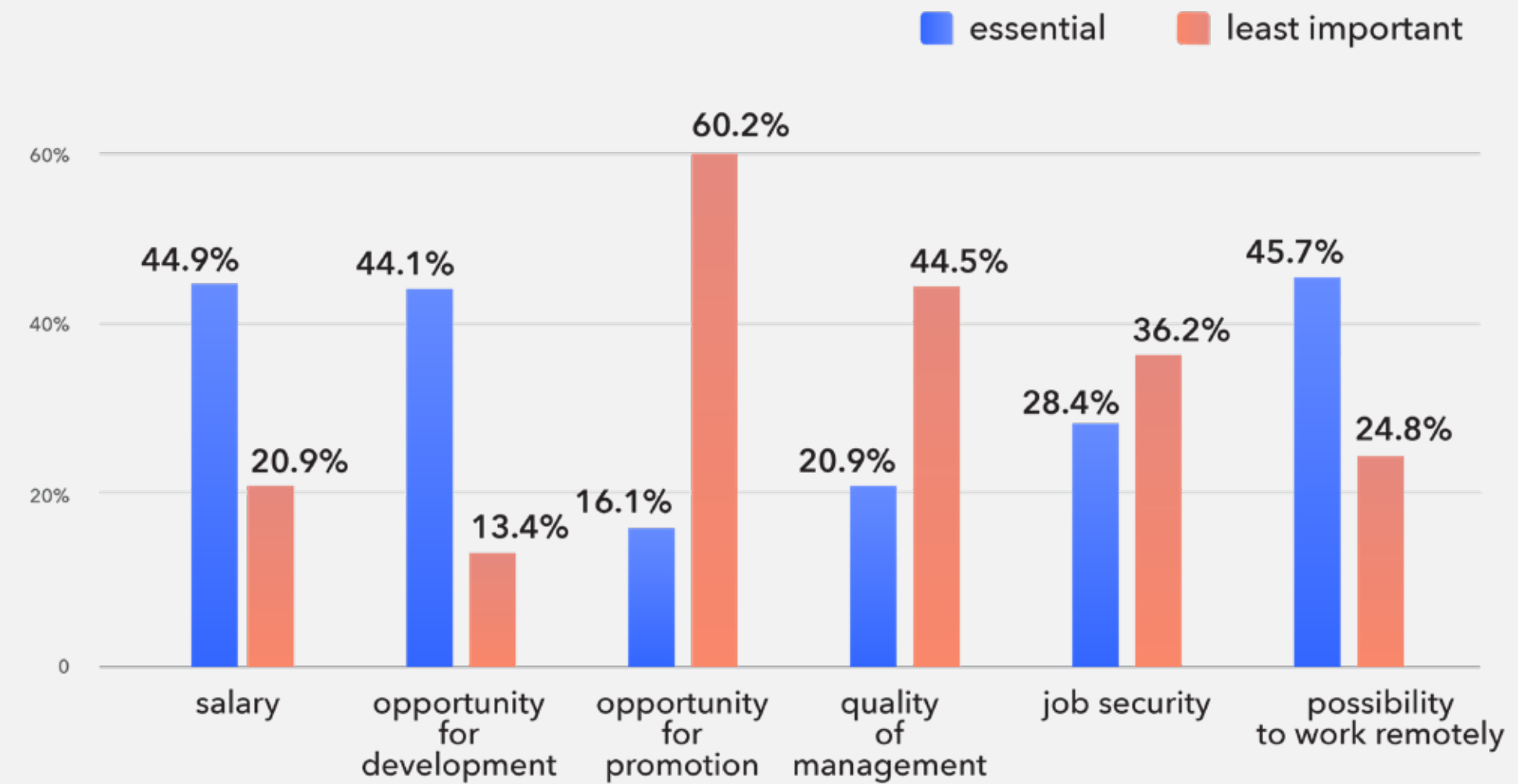
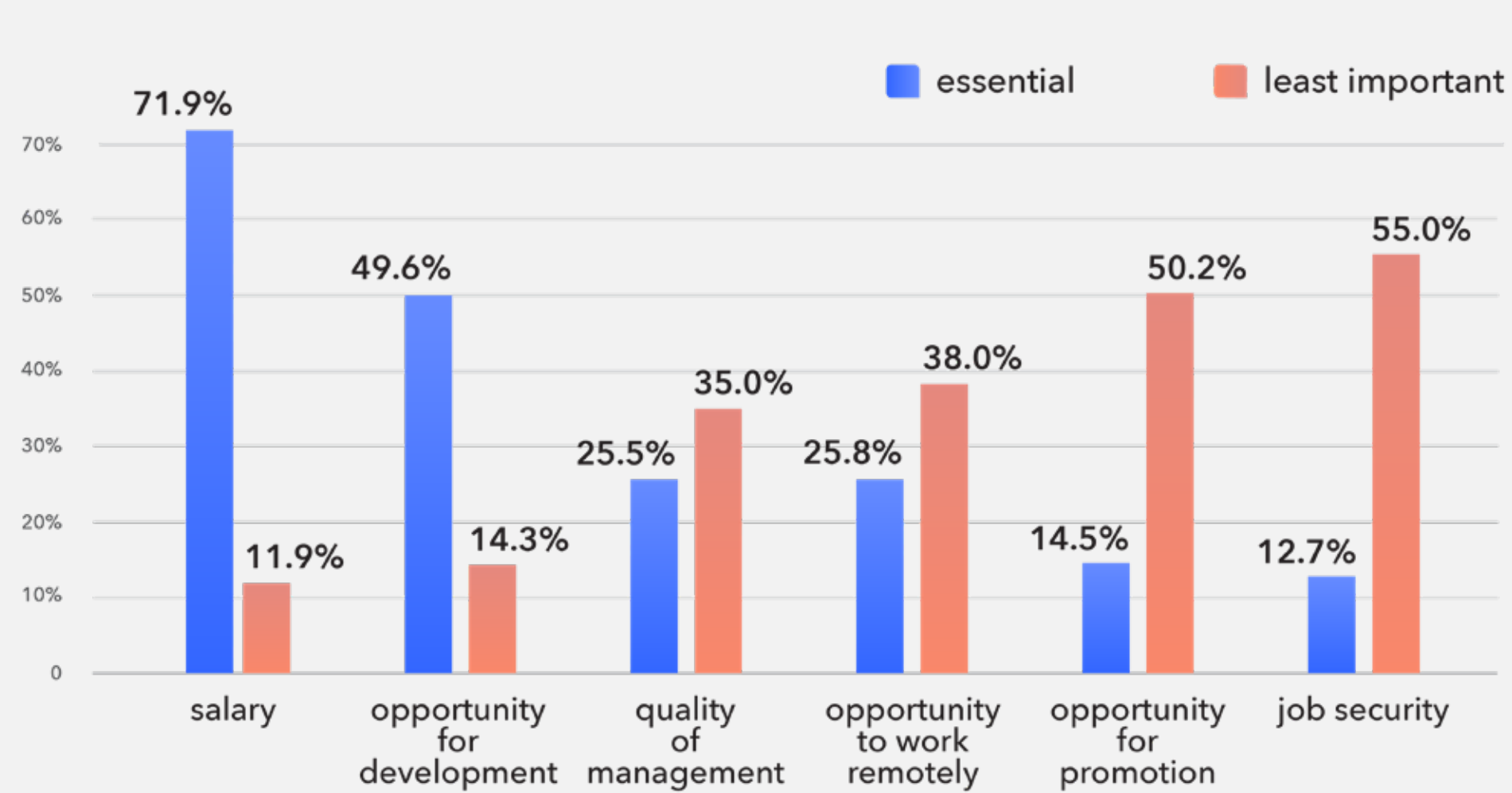
Source: Awarason study.

How to retain the best? Equally important as the salary and development prospects have become for candidates, the opportunity for remote work is

an increasingly key factor. Since salaries and development opportunities are similar in many companies, comfort of work may well determine the decision.

Motivation to change job in the next 12 months

Motivation to stay in the current company for longer



Source: Awarson study.

Source: Awarson study.

07. Salaries

3/4

of SAP specialists earn more than they did a year ago

1/2

of SAP specialists earn over 10% more

64%

of respondents expect a rise of over 10% in 2024

62%

of SAP Managers plan rises, but only up to 10%

175-225

PLN/h

net is the most common rate for a contractor

20 000 - 25 000

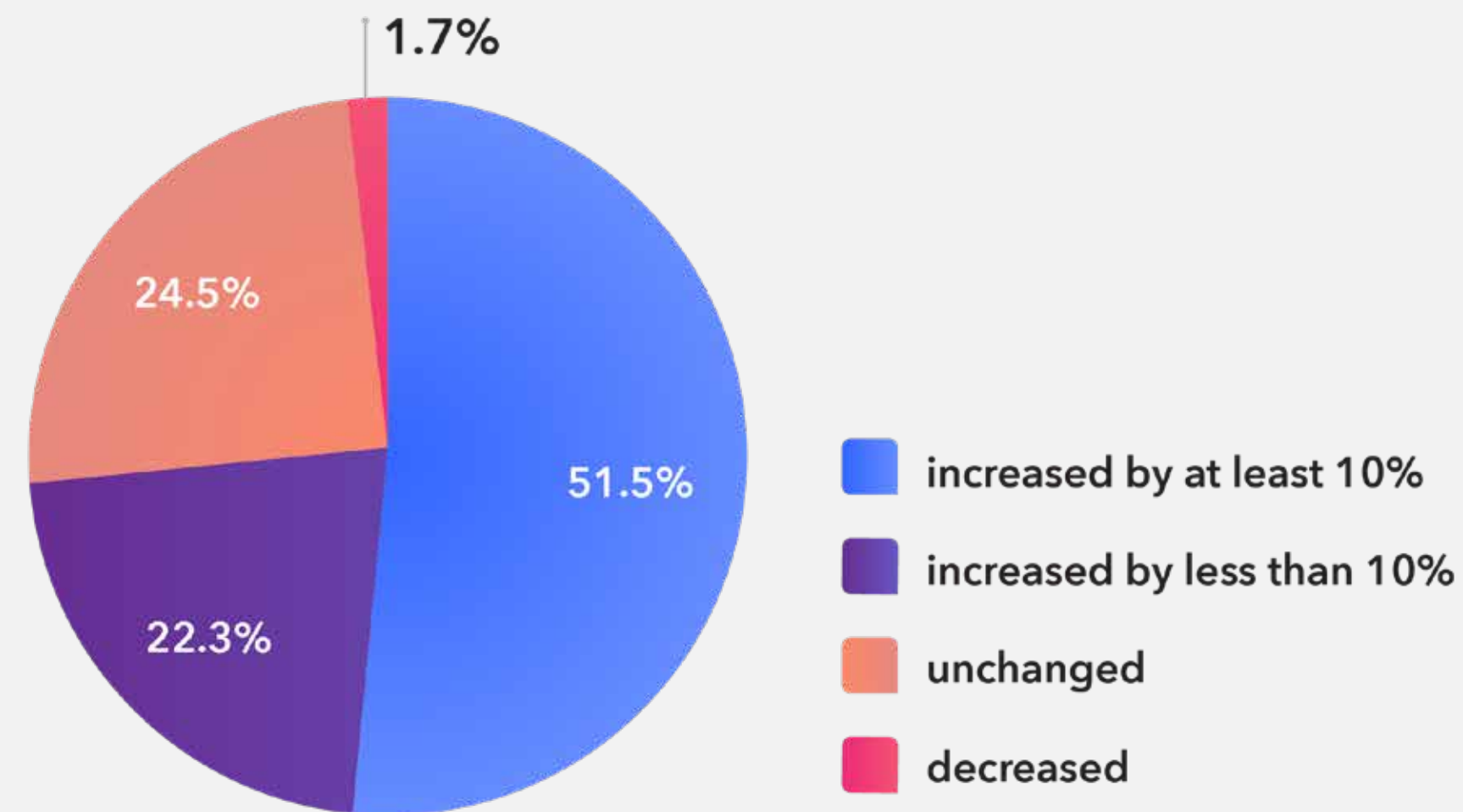
PLN/month

gross is the most common salary for a full-time position

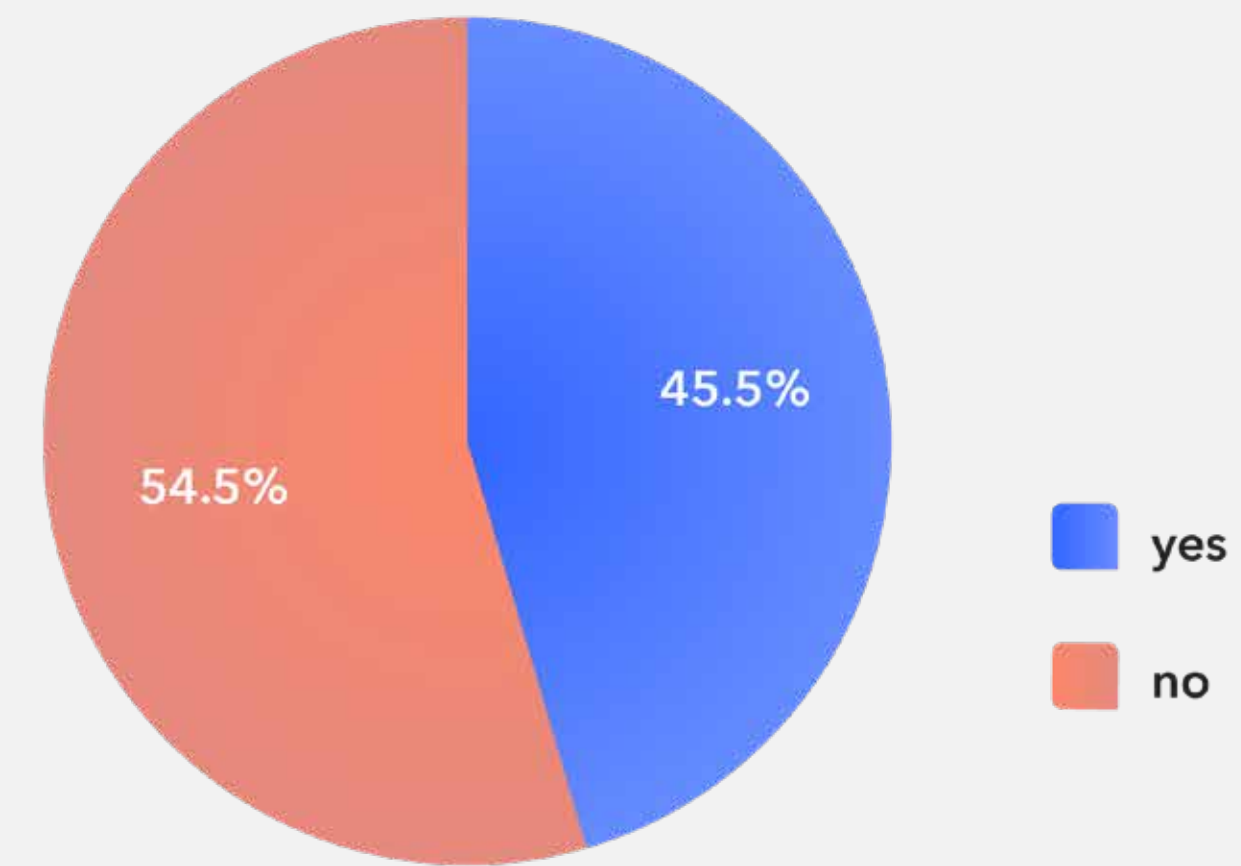
Analysing the data on SAP specialists' salaries, it is difficult, at first glance, to find signs of a slowdown experienced by the IT job market. The salaries of 75% of respondents increased in the past year, with half of them seeing an increase of over 10%. However, it is worth noting that by the end of 2023, inflation in Poland had reached 6.2%, with an average annual price increase of 11.4%.

SAP specialists are satisfied with their salaries, especially among seniors and experts. It is worth taking into account the fact that when it comes to financial satisfaction surveys, respondents always tend to under-estimate it. After all, why not earn more?

Has your salary changed in the last 12 months?



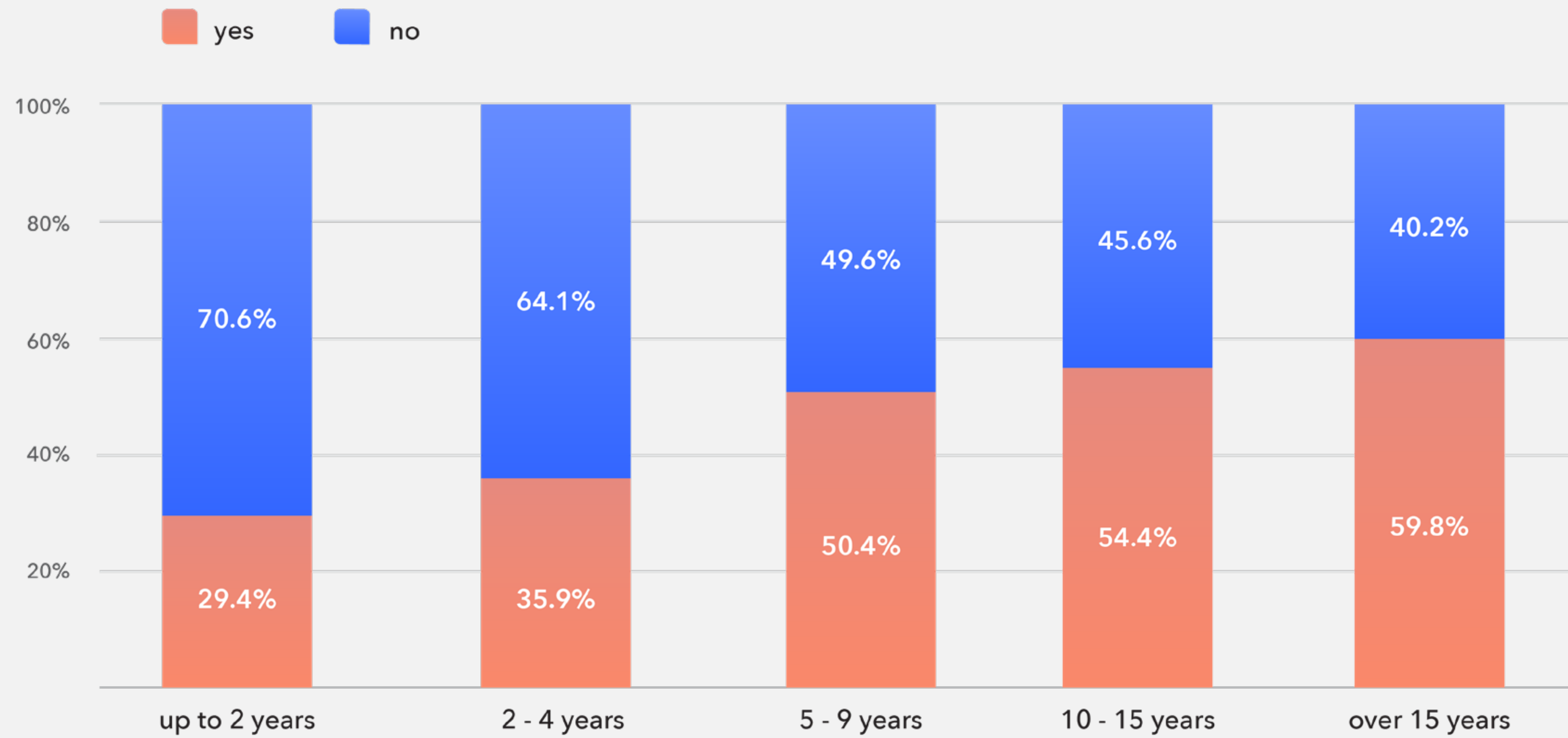
Is your current salary satisfactory?



Source: Awarson study.

Source: Awarson study.

Salary satisfaction vs experience

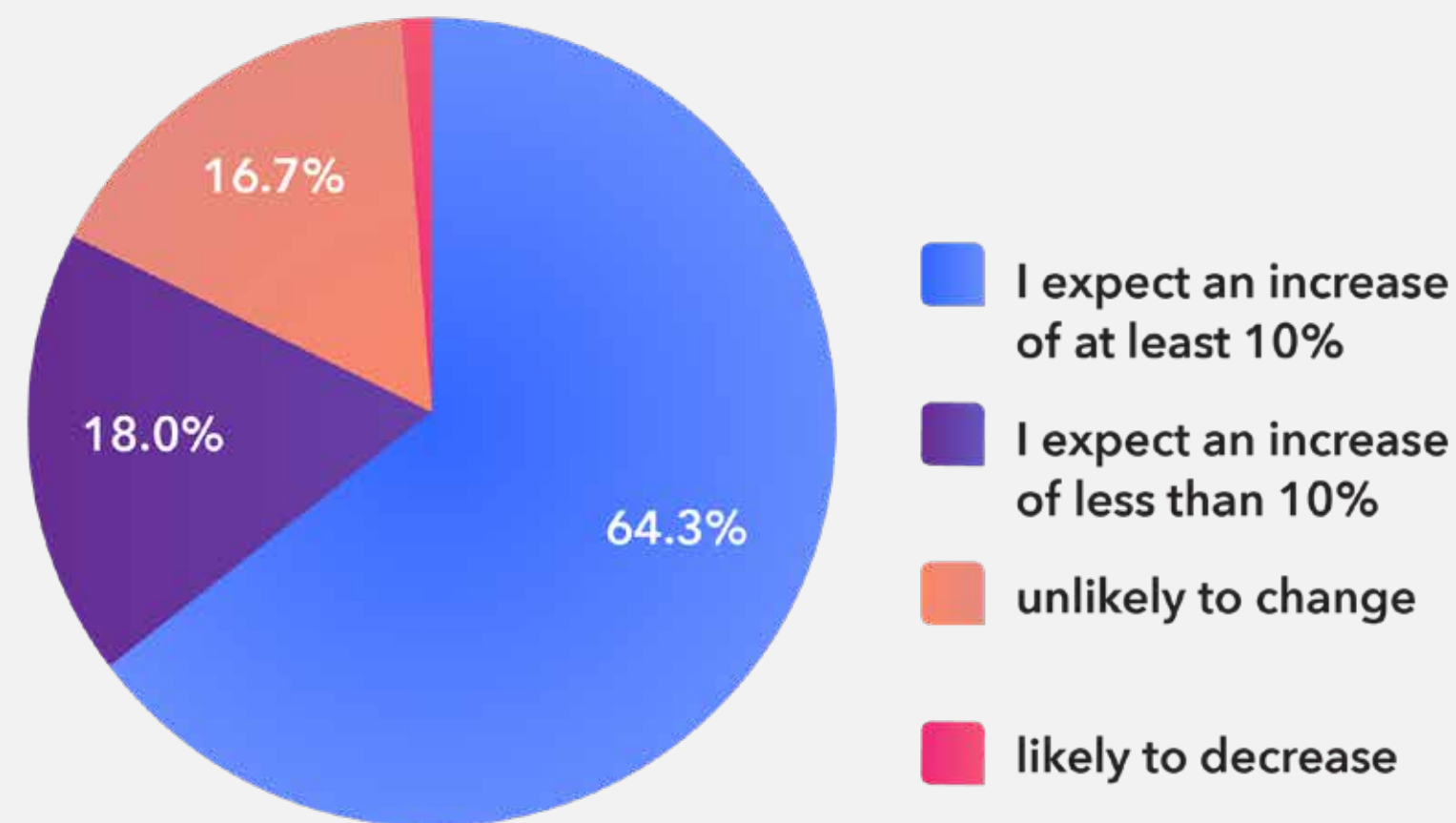


Source: Awarason study.

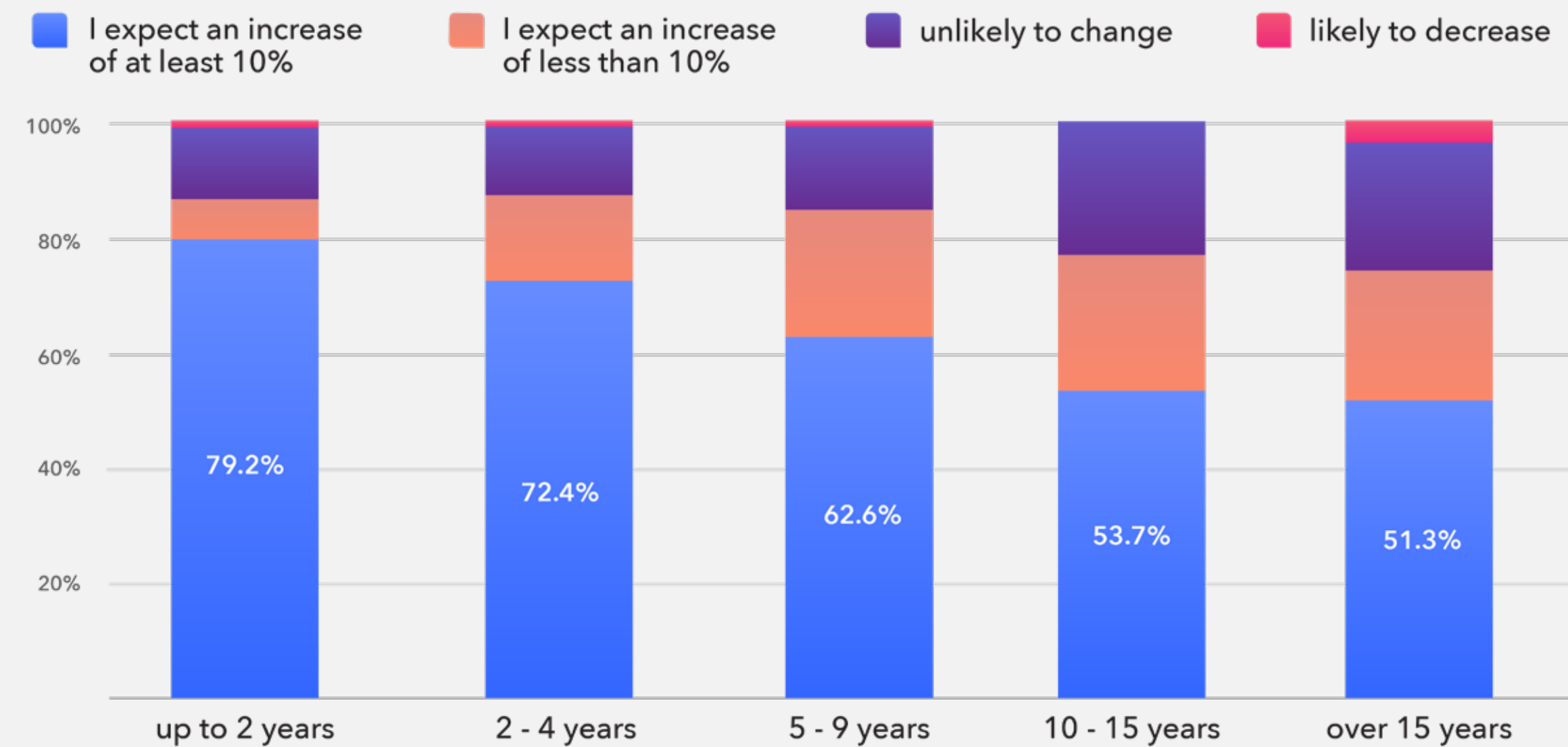
An interesting comparison can be made regarding SAP consultants' salary expectations year over year, for instance, the salary pressure in 2023 was significantly weaker. Slightly over 50% of respondents expected a rate increase of at least 10%, despite rampant inflation. Today, more than 60% are considering a rise of this magnitude, which is about 10 percentage points

higher. We can perceive this as a result of an improvement in economic conditions and, consequently, the job market situation. Another factor reinforcing SAP specialists' expectations is the desire to "make up for losses" suffered last year, when their rates did not keep up with the inflation level.

Expected salary development in the next 12 months



Expected salary development vs seniority



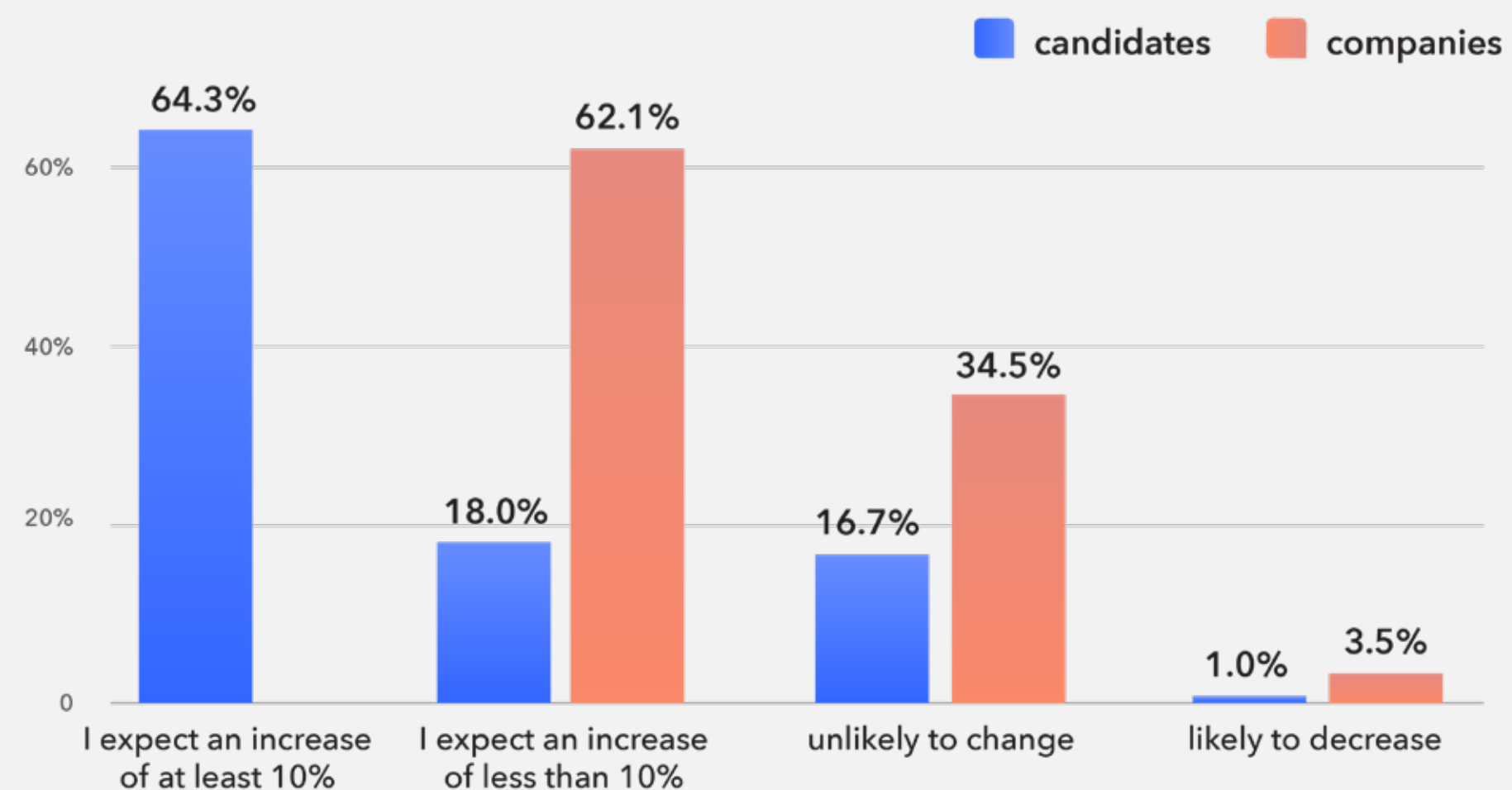
Source: Awarson study.

Source: Awarson study.

This year, the expectations of candidates and companies differ significantly. Two-thirds of respondents expect a salary increase of at least 10%. Companies do declare rises, but significantly lower ones.

This means that some of the most experienced consultants are seeking direct employment abroad. In Scandinavian or DACH countries, SAP specialists' rates are still 20-30% higher. On one hand, this makes it easier for Polish specialists to find jobs abroad, whilst on the other hand, it attracts investors to Poland interested in creating competence centres here.

Expected salary change: candidates vs companies



Source: Awarson study.



economic context and business strategies of companies, aiming to maintain a balance between meeting employees' expectations and ensuring the financial stability of the enterprise.

Joanna Supryk

IT Recruitment Team Leader at Awarson

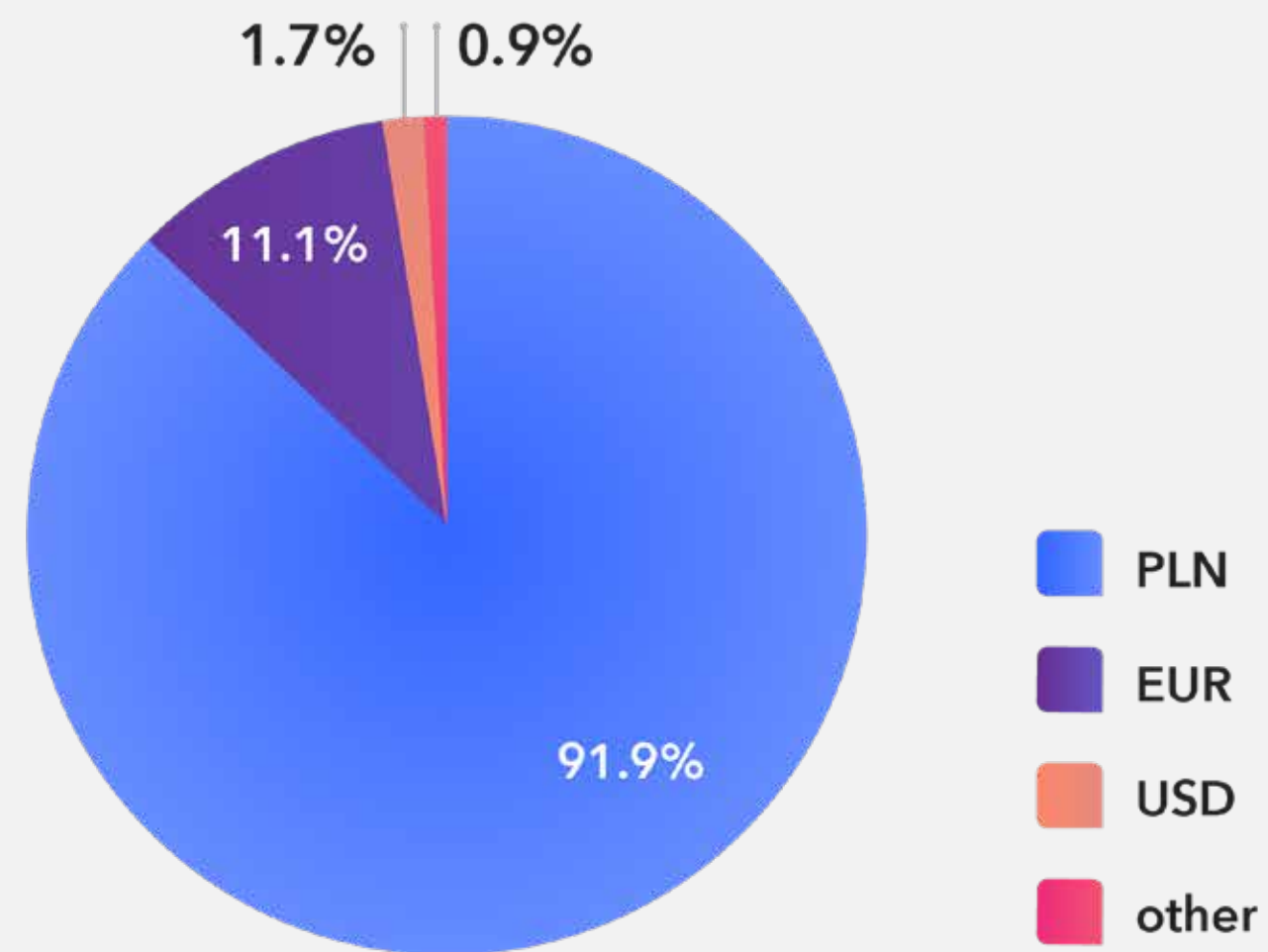
Forecasts for SAP consultant salaries in Poland, reflect the complexity of both the labour market and the expectations of both employees and employers. Although a vast majority, about 80% of consultants, are counting on a rise, actual company plans may be more conservative. The expected lack of spectacular rises may stem from employers' concerns about the uncertain economic situation, external factors, or simply caution in budget allocation for the coming quarters. Companies often also expect confirmation of first-quarter results, to better assess their ability to continue their development strategy.

Decisions regarding SAP consultant salary increases are clearly linked to the global

Despite the growing popularity of contract work, monthly settlements still dominate. The prevalence of time & material remuneration increase with

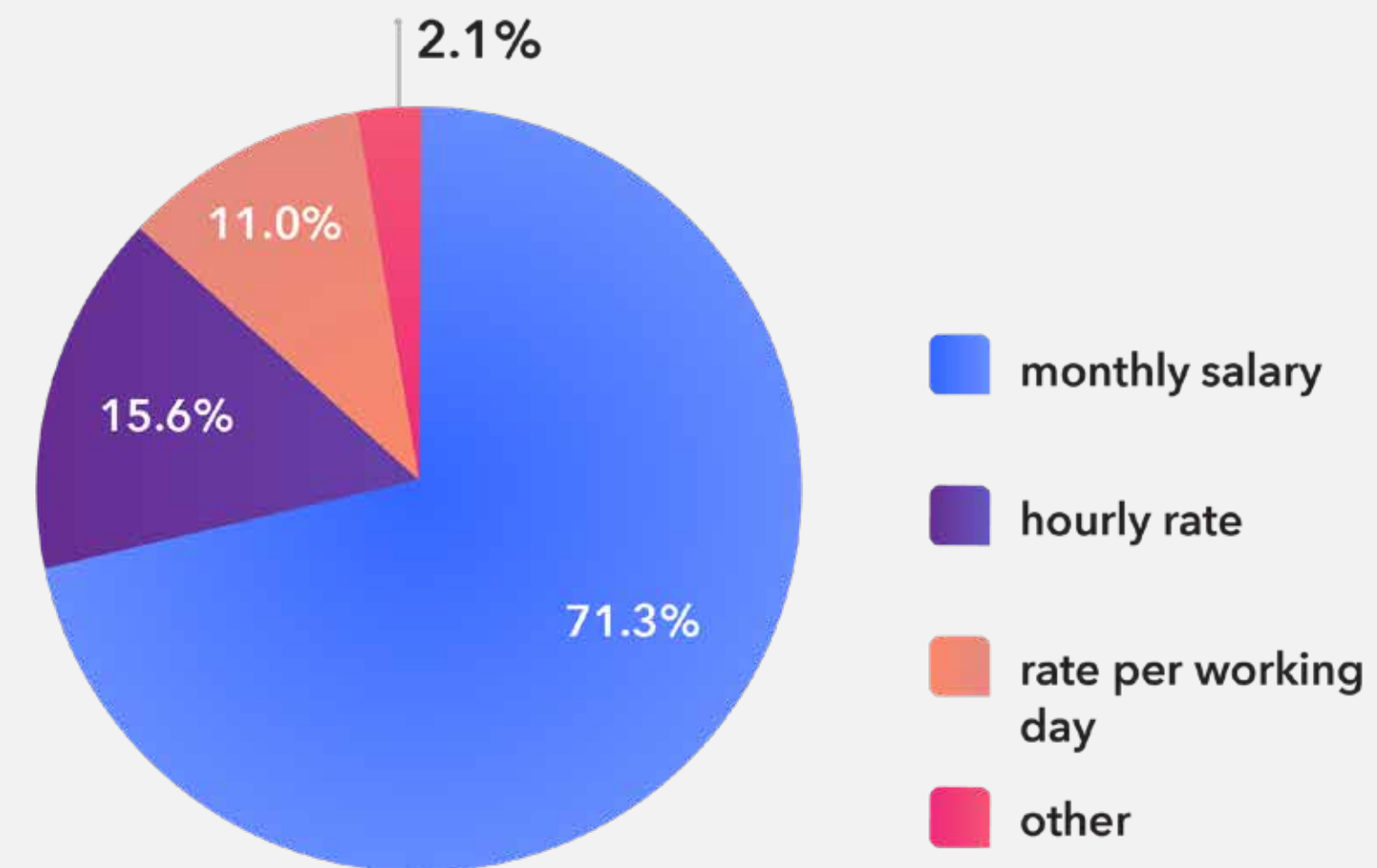
seniority. Experienced specialists switch to B2B contracts for tax reasons, and to be able to support multiple projects, simultaneously.

In what currency do you receive your salary?



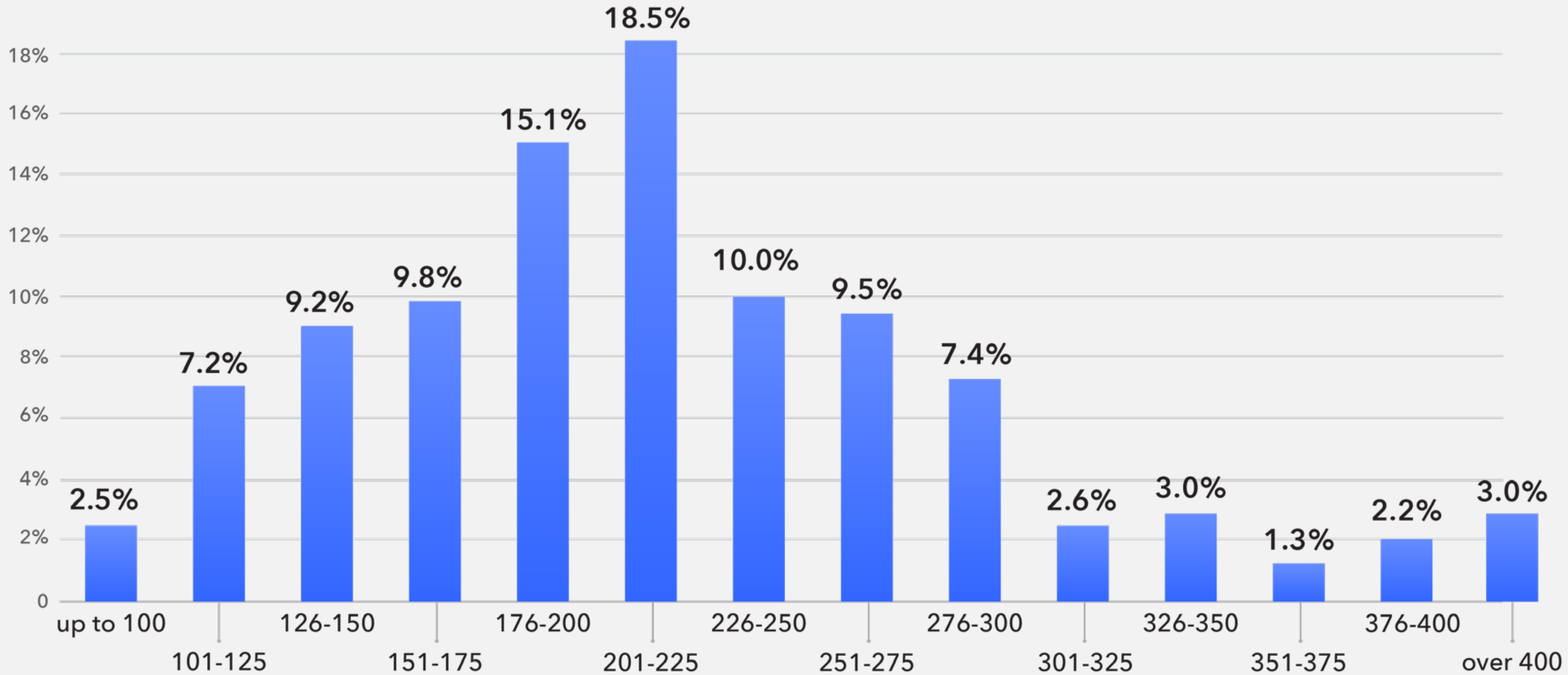
Source: Awarson study.

How is your salary calculated?



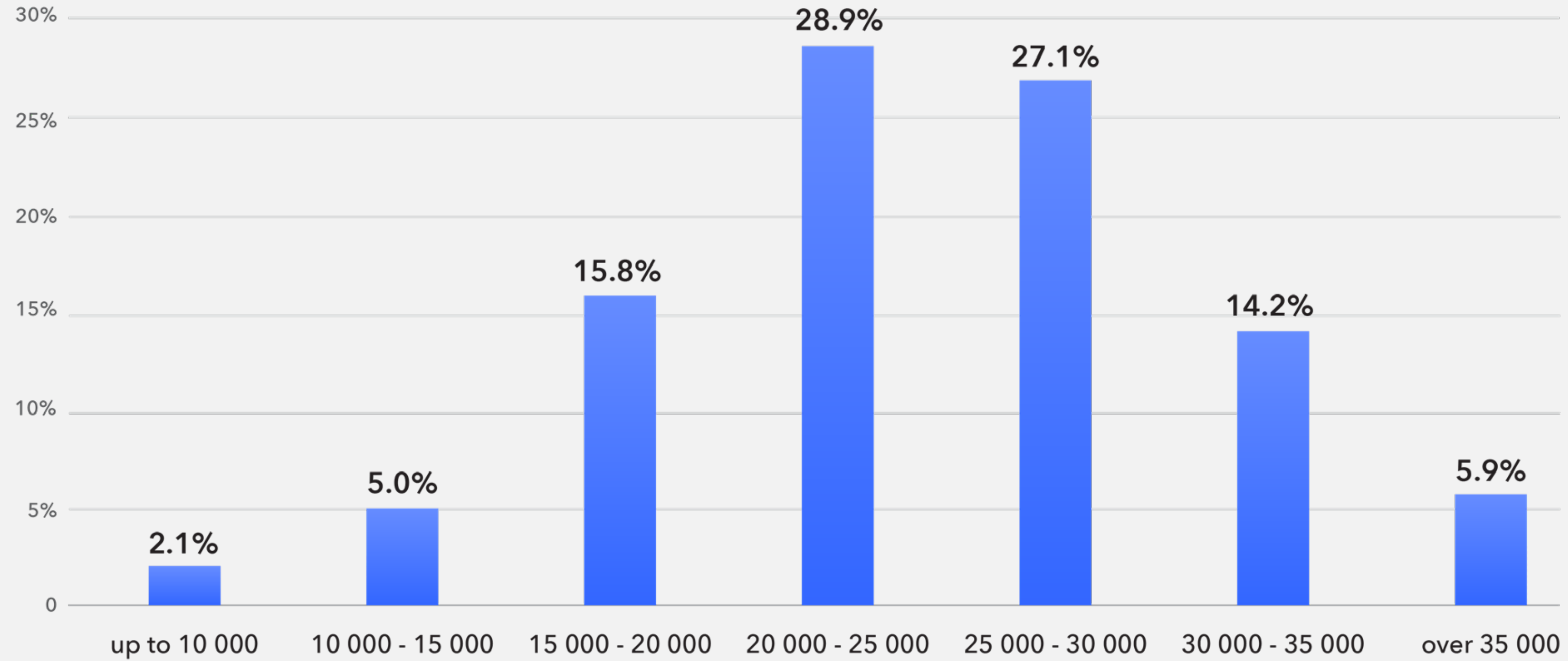
Source: Awarson study.

Salaries of SAP specialists - PLN/hour net



Source: Awarson study.

Salaries of SAP specialists - gross PLN/month



Source: Awarson study.

Salaries of SAP specialists

Salaries of SAP specialists on contract (PLN/h net)	junior	mid	senior	expert	Salaries of full-time SAP specialists (PLN/month gross)	junior	mid	senior	expert
ABAP	70 - 150	150 - 190	190 - 215	215+	ABAP	22 000 - 24 000	25 000 - 28 000	29 000 - 34 000	35 000 +
APO	120 - 190	190 - 250	250 - 300	300+	APO	16 000 - 22 000	23 000 - 31 000	32 000 - 42 000	42 000+
Architecture	bd	210 - 250	250 - 330	330+	Architecture	bd	25 000 - 28 000	34 000 - 42 000	42 000+
BASIS	70 - 140	140 - 185	185 - 220	220+	BASIS	14 000 - 22 000	22 000 - 26 000	26 000 - 28 000	28 500+
BW	90 - 160	160 - 210	210 - 230	230+	BW	22 000 - 26 000	26 000 - 28 000	29 000 - 34 000	35 000+
Concur	100 - 180	180 - 220	220 - 270	270+	Concur	21 000 - 24 000	24 000 - 28 000	29 200 - 34 000	35 000+
Data/Data Migration	bd	200 - 250	250 - 300	300+	Data/Data Migration	14 000 - 20 000	21 000 - 27 000	28 000 - 31 000	32 000+
EWM	150 - 200	200 - 260	260 - 295	295+	EWM	16 000 - 22 000	23 000 - 27 000	27 000 - 30 000	30 000+
FI/CO	95 - 180	180 - 220	220 - 290	290+	FI/CO	15 000 - 24 000	24 000 - 28 000	28 000 - 34 000	35 000+
Fiori	110 - 190	190 - 235	235 - 285	285+	Fiori	16 500 - 21 000	22 000 - 29 000	30 000 - 32 000	33 000+
HCM	90 - 150	150 - 200	200 - 230	230+	HCM	13 000 - 19 000	20 000 - 27 000	28 000 - 30 000	31 000+
Leadership	bd	bd	bd	bd	Leadership	28 000 - 33 000	34 000 - 40 000	40 000 - 45 000	46 000+
MM	100 - 160	160 - 220	220 - 260	260+	MM	15 000 - 24 000	24 000 - 28 000	29 000 - 34 000	35 000+
MDM	bd	200 - 240	240 - 290	290+	MDM	14 000 - 16 000	17 000 - 28 000	29 000 - 30 000	31 000+
PI/PO	150 - 200	200 - 250	250 - 310	310+	PI/PO	18 000 - 23 000	24 000 - 27 000	28 000 - 33 000	34 000+
PM	100 - 160	160 - 185	185 - 250	250+	PM	16 500 - 18 500	19 000 - 26 000	27 000 - 31 000	31 000+
PP	100 - 180	180 - 240	240 - 280	280+	PP	15 000 - 24 000	25 000 - 29 000	30 000 - 34 000	35 000+
Project Management	120 - 170	170 - 240	240 - 300	300+	Project Management	15 000 - 20 000	22 000 - 27 000	28 000 - 30 000	30 000+
RE-FX	120 - 170	170 - 200	200 - 260	260+	RE-FX	17 000 - 23 000	24 000 - 28 500	29 000 - 31 500	32 000+
SD	100 - 160	160 - 220	220 - 260	260+	SD	15 000 - 24 000	24 000 - 28 000	28 000 - 30 000	31 000 +
Security & Authorization	120 - 190	190 - 230	230 - 270	270+	Security & Authorization	15 000 - 26 000	27 000 - 30 000	30 000 - 39 000	40 000+
SuccessFactors	100 - 180	180 - 220	220 - 250	250+	SuccessFactors	14 000 - 17 000	18 000 - 27 000	28 000 - 29 000	30 000+
QM	110 - 190	190 - 250	250 - 290	290+	QM	16 500 - 17 000	18 000 - 27 500	28 000 - 30 000	31 000+
TM	110 - 190	190 - 240	240 - 330	330+	TM	14 000 - 18 000	19 000 - 28 000	29 000 - 32 000	33 000+
TRM	120 - 200	200 - 250	250 - 350	350+	TRM	14 000 - 20 000	21 000 - 29 000	30 000 - 33 000	34 000+
WM	100 - 160	160 - 190	190 - 250	250+	WM	13 000 - 19 000	20 000 - 26 000	27 000 - 28 000	29 000+

Source: Awarson study.

08. Opportunities and Challenges for the Future

52%

of companies plan to migrate to S/4HANA

19%

of consultants aim to expand the use of current modules

The top 3

most needed competencies are S/4HANA, FI/CO, and Fiori

93%

of companies will hire mid-level specialists

29%

of companies believe there will be no demand for juniors

14%

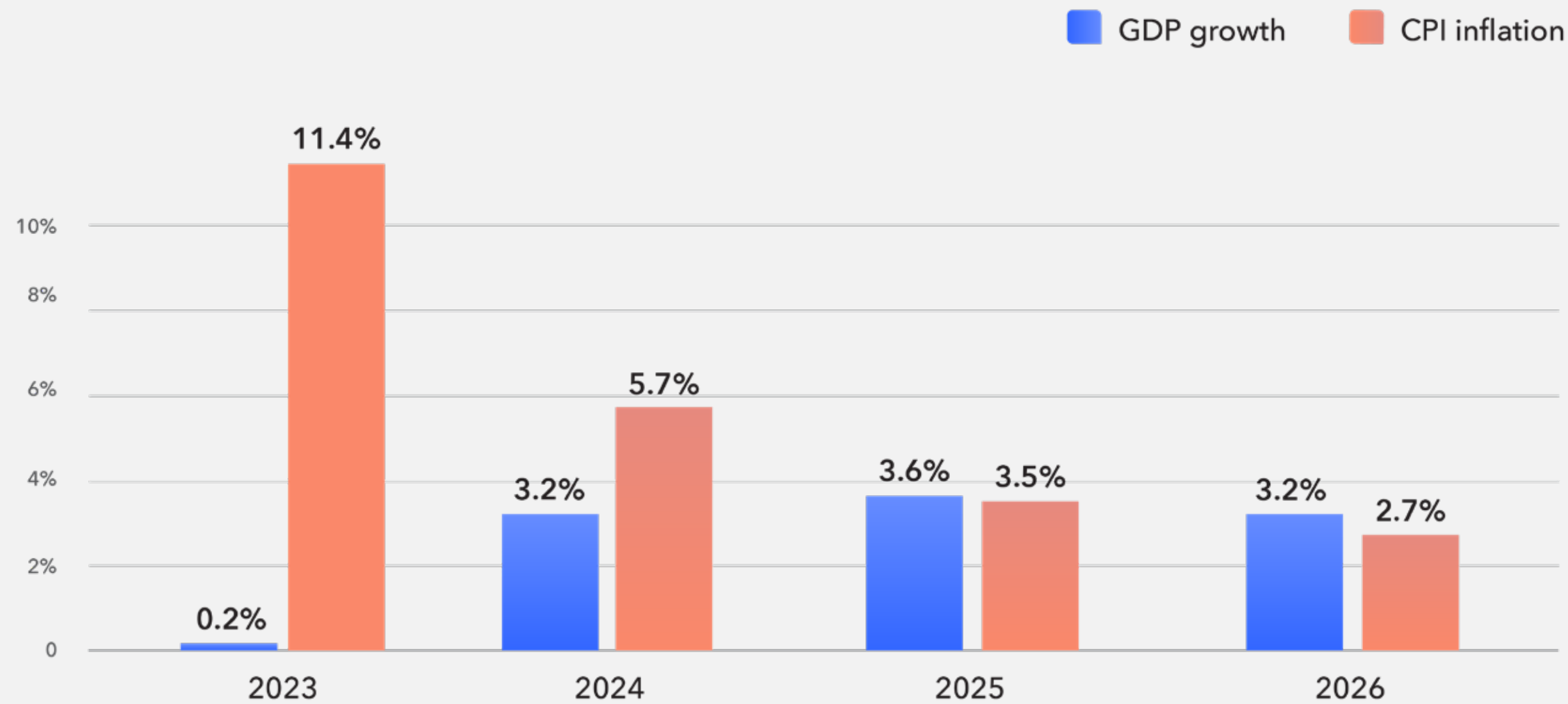
of juniors will learn S/4HANA within 3 years

Running a business in Poland has been a significant challenge in the past year. With over 11% inflation and minimal economic growth, coupled with high interest rates, development has been strongly hindered. Forecasts for the coming quarters and years look much better now. Assuming the non-extension of inflation-shielding measures, while price growth may not return to the NBP target level, the pressure on wage increases and the cost of raw materials will significantly decrease. The Polish economy is expected to again be one of the fastest-growing in Europe, and growth above 3% should have

a positive impact on the job market. This will encourage Polish and foreign companies to initiate new investments, whilst business development relates to ERP system development.

However, the migration of companies to the new version of the SAP system, to S/4HANA, will have a crucial impact on the market. More than half of the system users plan it. However, there are voices - visible in the survey and during meetings with clients - that the transformation will be so complex and costly, some companies may be inclined to seek alternatives to SAP.

GDP growth and inflation

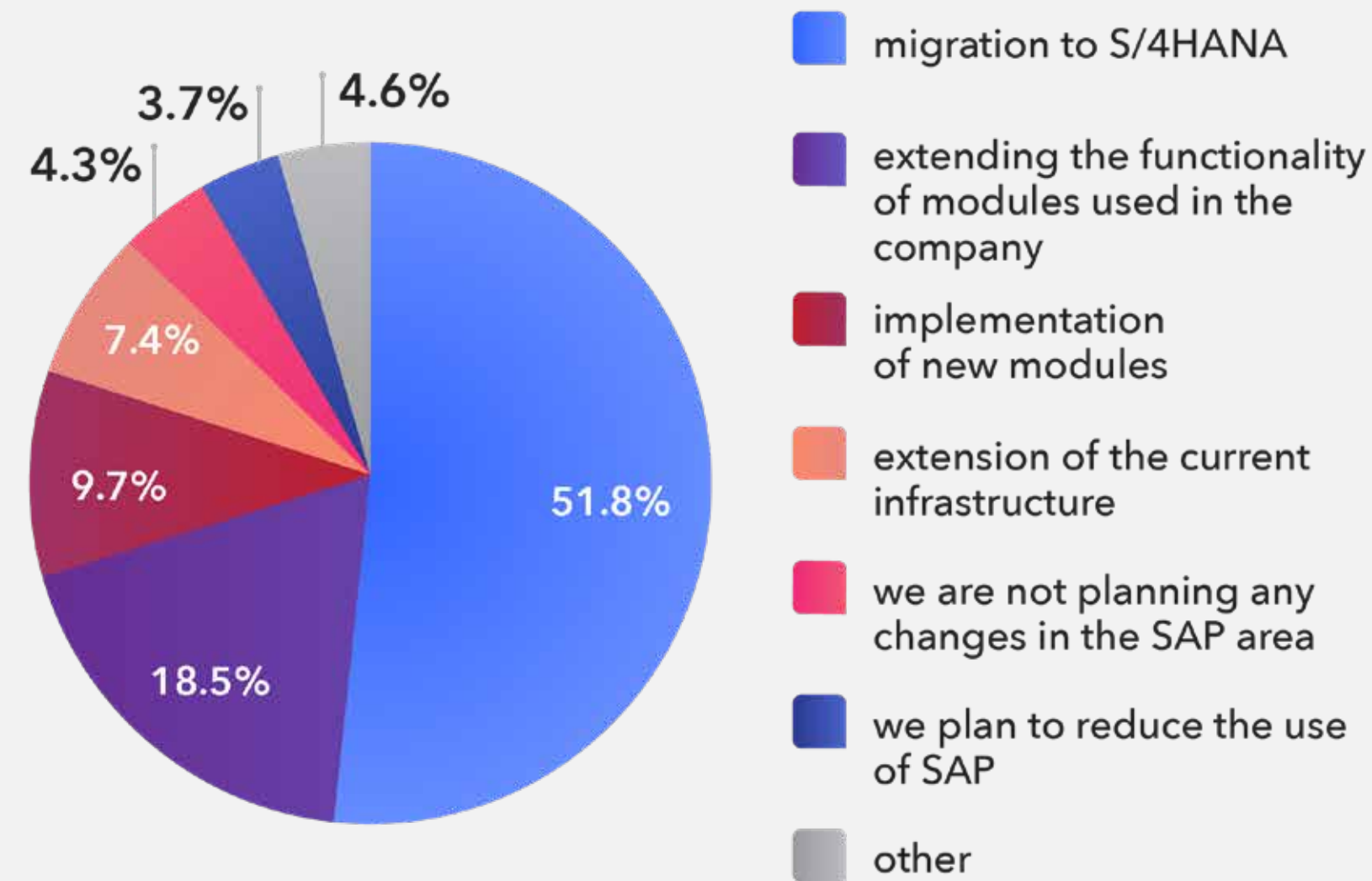


Source: NBP

Polish SAP consultants are gaining increasing experience and recognition in the European market, and interest in them will only grow in the coming years. This is due, not only to the upcoming wave of migration to new technology, but also to the retirement of specialists from Western markets. Polish society is still relatively young, active, and ready for new challenges, which is especially evident in its involvement in international projects.

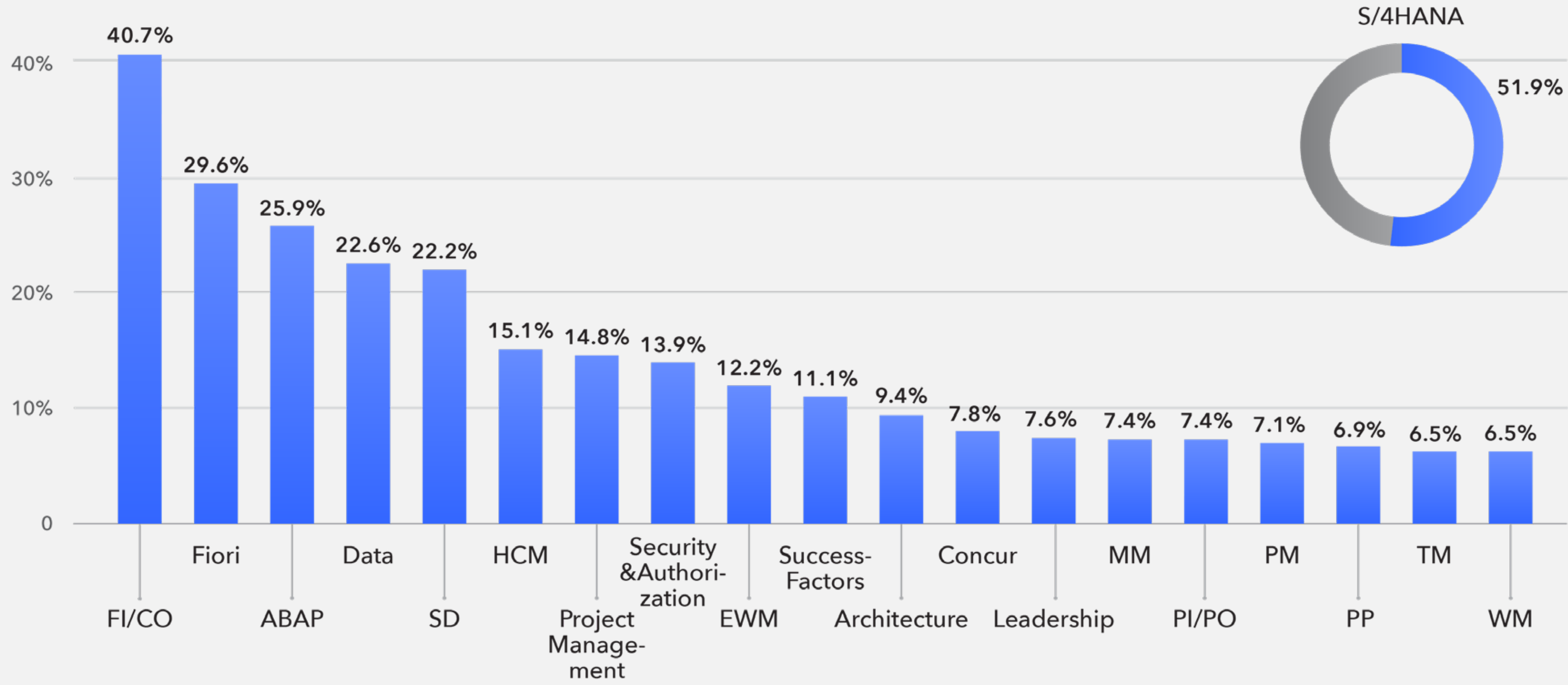
One of the key lessons we can draw from observing our Western neighbours, is investing in the new generation of SAP consultants. These specialists, for whom personal development is as important as their finances, are a key driving force for project stability and organisational development. Therefore, it is important for companies operating in the SAP area to support the activation of new specialists and assist in the development and careers of current experts.

What changes to the SAP system is your company planning?



Source: Awareson study.

The most desired SAP competencies by companies in the next 3 years



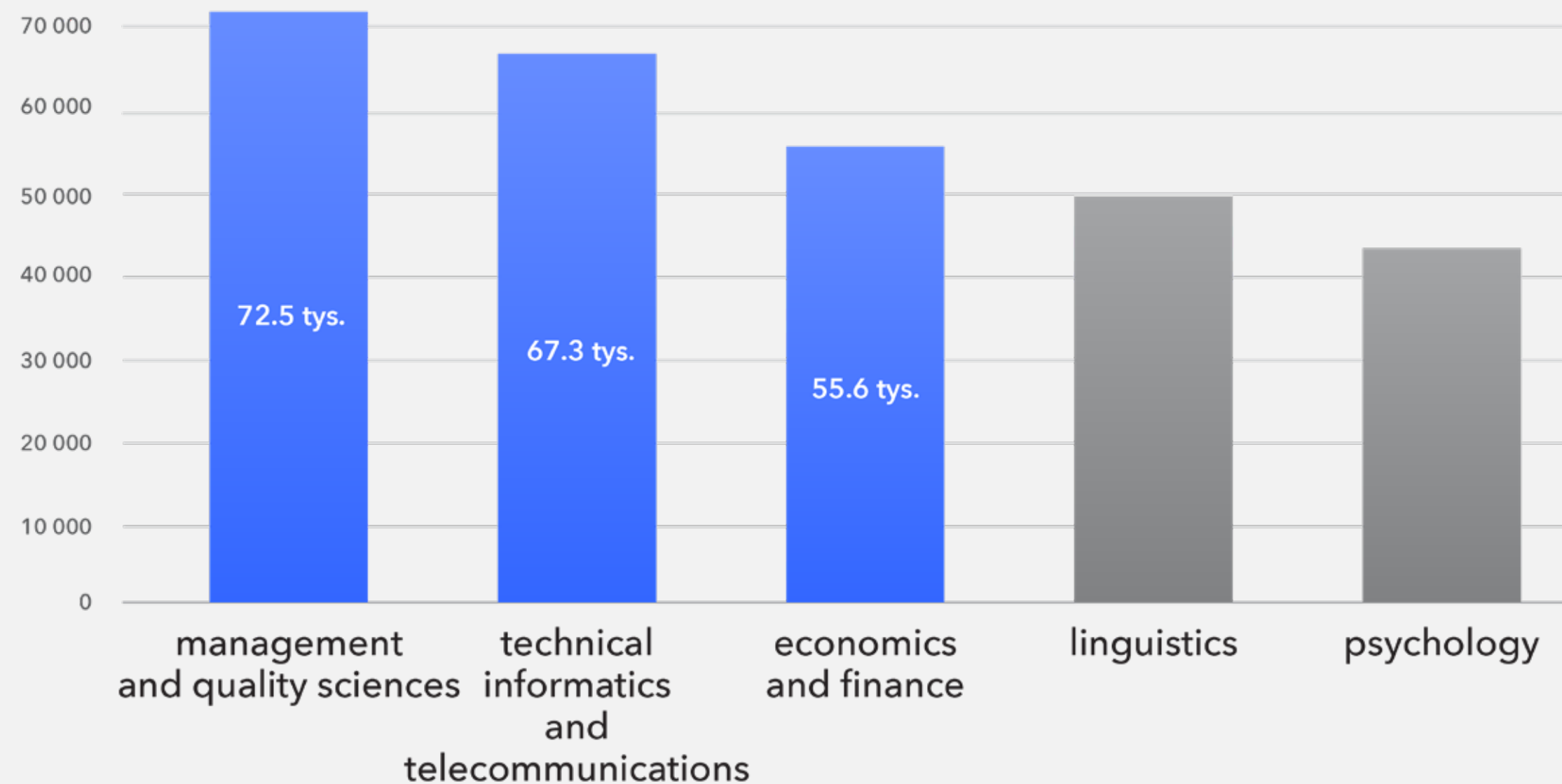
Source: Awarson study.

Where to look for them? Data in the report clearly shows that the direction of studies does not determine the choice of this profession, but there are specialisations that facilitate entry into the SAP job market: computer science, management, economics, finance and accounting, as well as logistics. Data from the Ministry of Science and Higher Education reveals that these areas are of interest to young people.

However, an even more important source of SAP specialists may be

shared service centres - as much as 33% of respondents have transitioned from "key user" to consultant. It is estimated that the number of such centres in Poland has exceeded 1700 (ABSL data), and they employ nearly half a million people. Over half of SSC/BPO sector companies emphasise that they provide their employees with opportunities for skills enhancement, and acquiring technical competencies is currently the most pronounced trend in the job market.

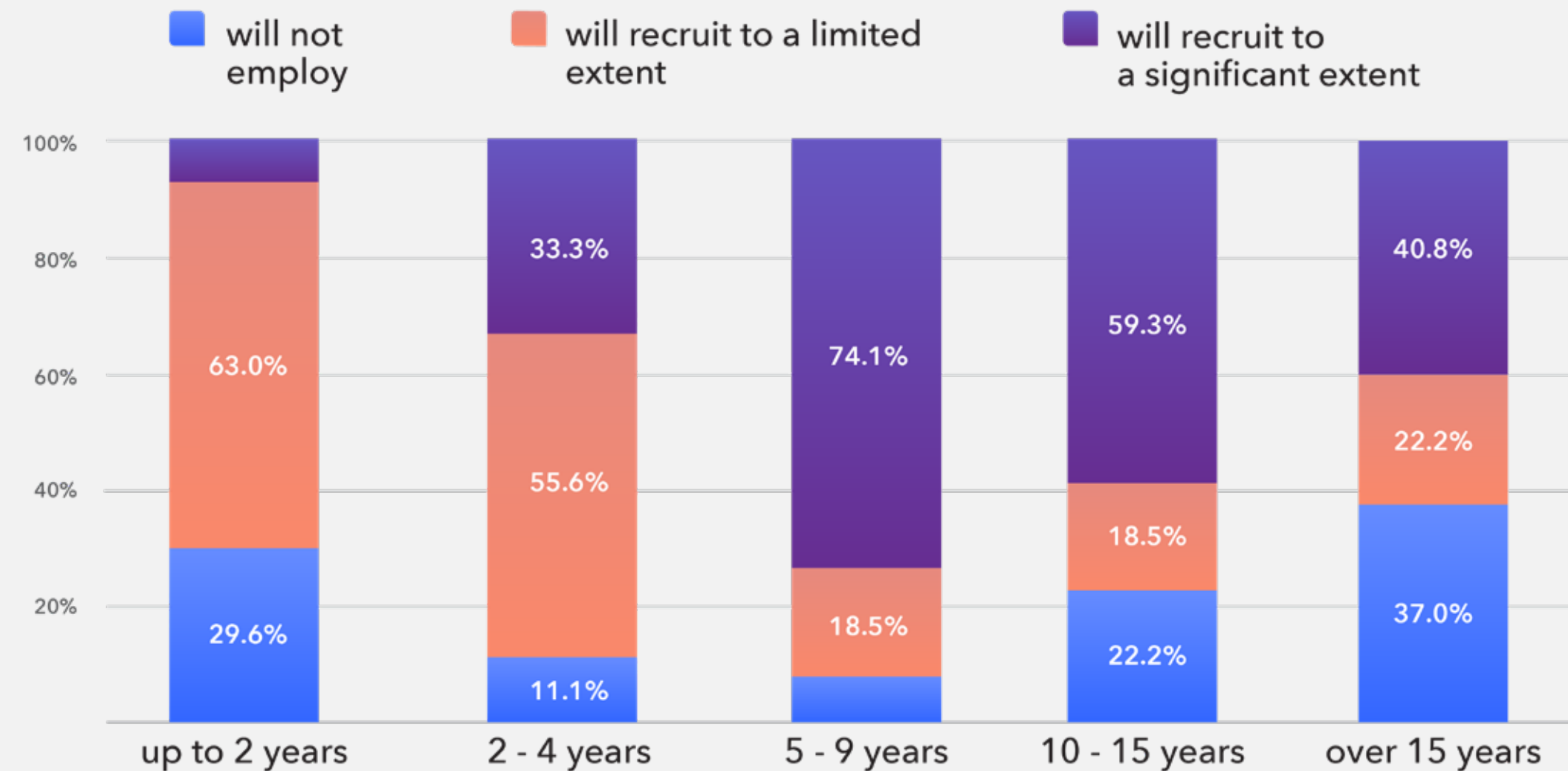
The most popular disciplines among candidates' for studies



Source: Ministry of Science and Higher Education.

Another good idea may be more effective promotion of SAP work among women, due to their low representation in the entire community. Working with ERP systems has the advantage over other IT fields in that, besides technical skills, it requires an understanding of business processes and relationship-building. Travel - a barrier for many women - once very common, has taken a 'back seat' in the post-pandemic reality.

What levels of specialists' experience will companies seek to hire in the next three years?



Source: Awarson study.



The IT market is constantly evolving, undergoing successive breakthroughs. Currently, we are in a phase of another transformation, where artificial intelligence (AI) plays a leading role.

AI not only enjoys tremendous media interest, but also brings financial benefits to organisations in a relatively short time. Particularly significant changes are taking place in the area of software development, which encompasses a wide range of technologies, both long-term and short-term, where technology can emerge, develop, and end its functioning within a few years, such as Xamarin.

At the same time, SAP tools, although accompanying large organisations for years and considered the foundation of business

processes, are often perceived by the software development community as outdated. However, in recent years, there has been a change in this perception, thanks to the introduction of new interfaces and updates that have refreshed their image. Nevertheless, their role in key business processes and the stability they provide, especially in times of crisis, remains unchanged.

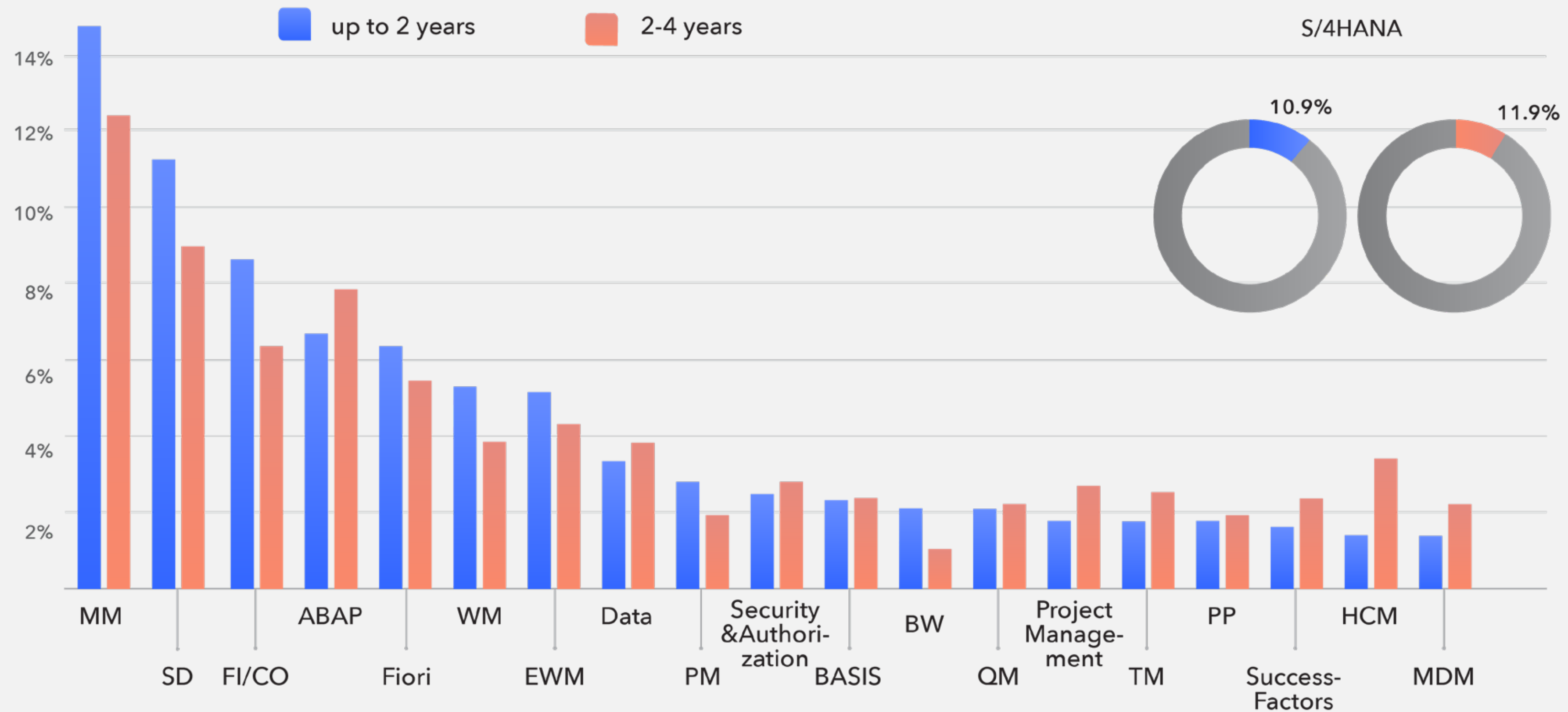
Investing in SAP specialists becomes even more important, being a key element in preparing for future changes.

Piotr Aftewicz
CCO at Awarson

As a result of the post-COVID-19 pandemic situation, many companies are now opting to change their business models to be based on “nearshore”, to shorten supply chains and secure their operations. In a study by the

Polish Economic Institute, Poland has been identified as the main direction of investment by these companies. This, therefore, presents a great opportunity for the IT market in Poland.

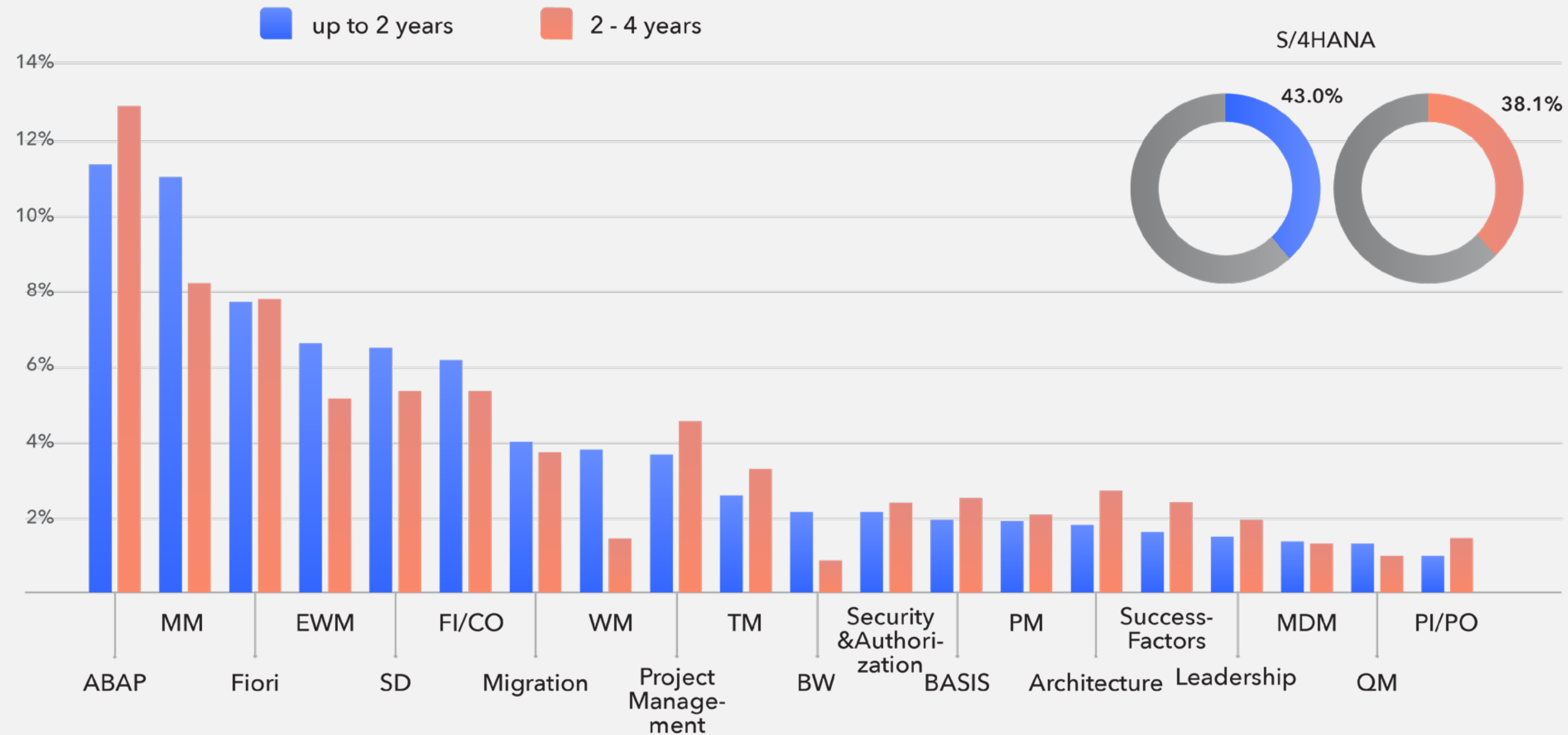
Competences of juniors



Source: Awarson study.

It can be confidently stated that Poland may be heading towards dynamic development for the entire technology sector. becoming the European Silicon Valley for SAP solutions, which promises

In which areas of SAP do juniors want to develop in 3 years?



Source: Awarson study.



For the past 7 years, Awareson has been supporting the digital transformation of Polish and international companies. We provide organisations with access to specialised knowledge and top-notch IT experts. We focus most of our attention on the areas of SAP, Software Development, Security, Data, and DevOps.

Our IT outsourcing and recruitment services include:

- body leasing
- IT recruitment and HR consulting
- establishing competency centres
- managed services.

Our advanced SAP consulting services encompass:

- analysis and creation of SAP project RFPs (Request for Proposals)
- analysis and evaluation of proposals in response to RFPs
- supervision of project quality during implementation



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