



Polish Investment  
& Trade Agency  
PFR Group

# THE INFORMATION & COMMUNICATION TECHNOLOGY SECTOR

**Poland.** Business Forward



## Poland is an internationally acclaimed destination for:



### Pristine nature

A top 10 country to visit according to Lonely Planet



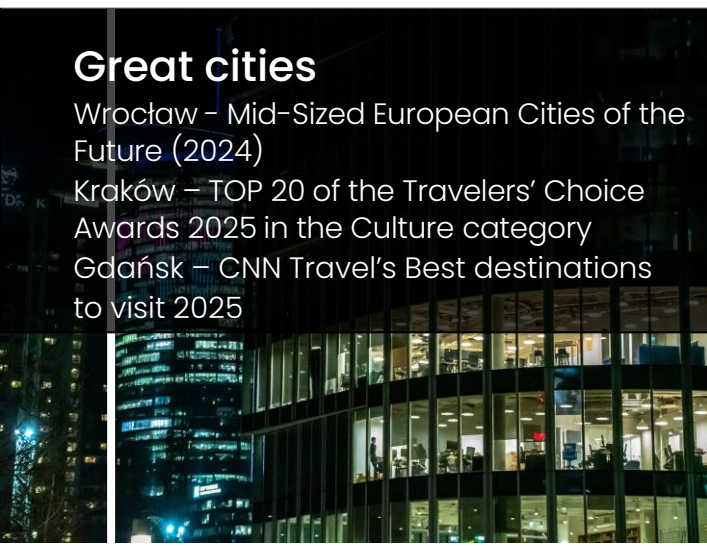
### A place where East meets West

Dynamic business hub at the heart of Europe



### Vibrant food scene

Warsaw among Top 20 Vegan-Friendly Cities in the World (HappyCow 2024)  
Poland ranked 11th in the TasteAtlas awards 24/25 of the 100 best cuisines in the World



### Great cities

Wrocław – Mid-Sized European Cities of the Future (2024)

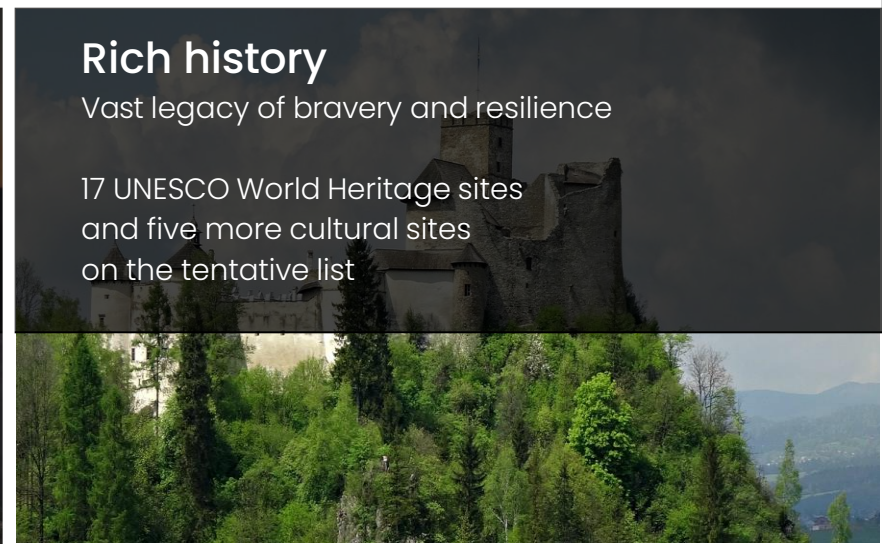
Kraków – TOP 20 of the Travelers' Choice Awards 2025 in the Culture category

Gdańsk – CNN Travel's Best destinations to visit 2025



### Attractive place for expats

Young, increasingly international society, with a very high level of English proficiency



### Rich history

Vast legacy of bravery and resilience

17 UNESCO World Heritage sites and five more cultural sites on the tentative list



WHY  
POLAND



FACTS ABOUT  
THE POLISH ICT  
SECTOR



WHAT MAKES  
US DIFFERENT



DID YOU KNOW  
THAT



SUPPORT  
INSTITUTIONS



HOW WE CAN  
HELP YOU

## Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019

## Superb market share

Poland is the sixth largest economy in the European Union in terms of GDP

## Large, high-quality talent pool

Nearly 300k of well-educated graduates annually

## Resilient economy

Poland is considered to be one of the most economically stable and fastest developing countries in the world.

## Transparent

Regional leader (2nd in CEE) in the Transparency International Corruption Perceptions Index

## FDI magnet

In 2023, Poland was ranked highest in the CEE region and sixth in Europe in terms of the number of inward foreign direct investments.

## Top-notch infrastructure

5th longest highway network in the EU  
Over 5,205 km total length of motorways and expressways

## Ratings remain high despite the turbulent times

Moody's: A2, S&P: A-, Fitch: A-, as of the second half of 2024

## Competitive, well-developed cities

European Cities of the Future 2024 (fDi Intelligence):  
Warsaw – 4th position overall (ahead of Paris and Munich)  
and 2nd in the business friendliness category among major cities;  
The Silesia region ranked 3rd in the “cost-effectiveness” category;  
Western Pomerania – European Entrepreneurial Region in 2022–2023,



# FACTS ABOUT THE POLISH ICT SECTOR



## Europe's top talents

According to the *IT Competitiveness Index\**, in the "Talent" component Poland is number 5 out of all the rated countries. In addition, Poland also ranked 5th in the IT infrastructure, 9th in the Economic Environment and 8th in Business Environment.



## 4th Most Favoured Offshore CX Delivery Location

Poland is the only European nearshore location in the list, which has been ranked in the top 5 for the fourth year running.



## Large talent pool

Studies related to the ICT sector have shown an increase in the number of students for another consecutive year. In the 2022/2023 academic year, more than 70,000 people studied these majors.



## The most dynamic development of the digital economy

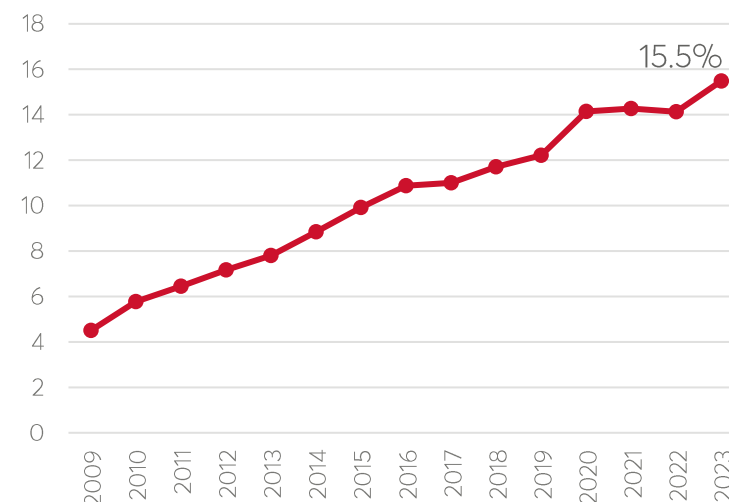
According to PwC forecasts, e-commerce to consumers alone will reach more than €42 billion in Poland by 2027. Such a fast growth rate of e-commerce value puts Poland at the forefront of countries that are the most dynamically developing the digital part of their economy.



## The ICT market is growing in strength

The value of Poland's ICT exports in 2023 was \$16.85 bn, compared to \$13.48 bn in 2022 and \$11.58 bn in 2021.

The export of ICT services in 2023 amounted to 15,5% of the total export of services from Poland



Poland is gaining more and more importance as a leader in the field of IT in Central and Eastern Europe. Investments by global players such as Google, Amazon, Microsoft and Data4 in data centers in Poland confirm the country's attractiveness for the technology industry.

Sources:

\*Future of IT Report 2024, Emerging Europe

The Most Favoured Offshore CX Delivery Locations, *India is the Most Favored Offshore CX Delivery Location in 2024* - Ryan Strategic Advisory

<https://www.statista.com/statistics/1023007/poland-number-of-ict-students-and-graduates/>

Decade of Polish e-commerce, e-Chamber Report Report 2023

Poland ICT Industry Outlook 2022 – 2026, Report Linker

<https://data.worldbank.org/indicator/BX.GSR.CCIS.ZS?locations=PL>

# WHAT MAKES US DIFFERENT

## A land of smartest people

Poland ranks 10th in Top 10 Smartest Countries Based on Reading, Math and Science according to OECD.



## Competence in English – no problem!

The majority of Polish programmers boast higher education. In addition, Poles have an excellent command of English (598 points in the English Proficiency Index), which places us 13th out of 113 ranking countries.

## An environment of development for programmers

Poland has the largest pool of technology talent in Europe, with approximately 600,000 programmers working here, accounting for more than 25% of the entire development community in CEE.

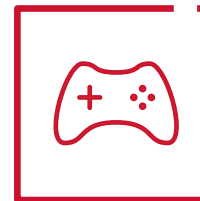


## Your data is secure with us

Poland attaches great importance to international standards of intellectual property protection. As a result, it is recognized by major international corporations as a safe place for IT outsourcing.

## Recognized as one of the best

Many global technology companies, such as Microsoft, Intel and Google, have invested in Poland, because of the quality of our IT environment. With data centers and R&D facilities, the Polish IT sector continues to grow.



## Gaming-geeks

Games are one of Poland's strongest assets. Companies such as CD Projekt, Techland, PlayWay, Huuuge, Ten Square Games and 11 bit studios are proof that Polish companies provide the best experiences for gamers around the world.

Sources:

EF English Proficiency Index 2023

<https://worldpopulationreview.com/country-rankings/smarter-countries>

<https://qubit-labs.com/software-outsourcing-to-poland/>

# DID YOU KNOW THAT



## A strategic hub for the BSS sector

More than 85% of all IT professionals in Poland are employed in one of the seven largest IT hubs. Three Polish cities, Warsaw, Krakow and Wroclaw, are the most recognized globally as IT/ICT basins.



## Krakow – the royal city for start-ups

Krakow is one of the most rapidly growing start-up centers, with 60,000 IT professionals and more than 500 technology companies. Every year Krakow's talent pool grows by 10%, increasing 10-fold in the past 25 years.



## We have the best programmers

Poland maintains its strong position in the top three countries with the best programmers in the world. In the Emerging Europe – Future of IT 2023 Report, Poland was also ranked 1st in the evaluation of the talent availability factor.



## More and more software companies

There are currently more than 50,000 IT companies in Poland. This includes more than 1,300 software development companies, a number that's been increasing by about 10% each year.

Sources:

Where to open an IT Hub in Poland Report Talent Place 2023

Krakow IT Market Report 2024, Motife

Emerging Europe – Future of IT 2023 Report

# SUPPORT INSTITUTIONS



## Digital Affairs – The Chancellery of the Prime Minister

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### PARP

Develops Polish entrepreneurship through innovation and discovering new directions of development

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### NCBR

A Government institution overseeing the development of innovativeness

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### Startup Poland

The main advocate and think-tank dedicated to Startups in Poland

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### Software Development Association Poland

Supports and integrates Polish software companies

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### Digital Poland Foundation

Turns digital challenges into opportunities for the Polish economy

# The Polish Investment and Trade Agency

The Polish Investment and Trade Agency's (PAIH) mission as a Government Agency is:

- To enable small- and medium-sized companies to reach their full potential in exporting their products and services around the world
- To support potential investors in Poland by providing comprehensive and up-to-date information services regarding legal and tax aspects, location and human capital, as well as on the available financial incentives
- To promote 'Poland as a Brand'

## How we can help

PAIH's experienced team of experts with a hands-on approach and excellent understanding of the needs of entrepreneurs will ensure that your projects will move as fast and smooth as possible.



**Information packs**  
macroeconomic, HR,  
legal, sectoral data



**Analysis  
of export  
potential**



**Preparing  
information  
packs**



**Verifying  
business  
partners**



**Organising  
business  
missions**



**Preparing lists  
of possible  
business partners**



**Organising  
B2B meetings**



**Support in contacts  
with Government  
Agencies**

# Contact us

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Strategy and Analysis Division  
Promotion Department  
2025



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