



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 10 Vegan-Friendly Cities in the World

**Great cities**  
Wrocław – most business friendly medium – sized European city (2022)  
Kraków – a TOP 25 Travellers’ Choice 2022  
Łódź – in the „Best of the World 2022” List by National Geographic

**Attractive place for expats**  
Young, increasingly international society, with a very high level of English proficiency

**Rich history**  
Vast legacy of bravery and resilience

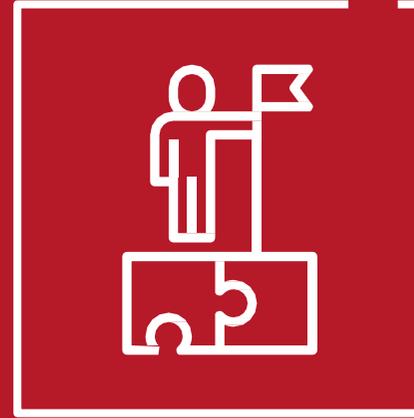




WHY  
POLAND



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

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 2021, Poland was ranked highest in the CEE region and ninth in Europe in terms of the number of inward foreign direct investments.

## Top-notch infrastructure

5th longest highway network in the EU  
Over 4,880 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 first half of 2022

## Competitive, well-developed cities

European Cities of the Future 2023 (fDi Intelligence):  
Warsaw – 6th position overall (ahead of Berlin and Stockholm)  
and 2nd in the business friendliness category among major cities;  
The Silesia Region – European Entrepreneurial Region in 2021-2022,  
among the top ten European regions in terms of attracting FDI and cost-effectiveness



# FACTS ABOUT THE POLISH ICT SECTOR



## Europe's top talents

According to the *IT Competitiveness Index\**, in the "Talent" component Poland is number one over all the rated countries. In addition, Poland ranked in the top four in eleven of the forty five categories.



## 4th Most Favored Offshore CX Delivery Location

Poland is the only European nearshore location in the list, which has been ranked in the top 5 for the third 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 2021/2022 academic year, more than 67,000 people studied these majors.



## The most dynamic development of the digital economy

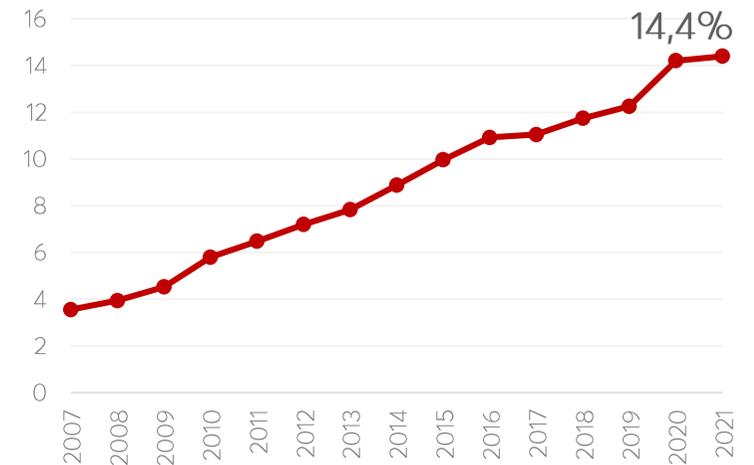
According to PwC forecasts, e-commerce to consumers alone will reach more than €42 billion in Poland by 2027. Today, Poland has the largest digital economy in the CEE region with a value of more than €44 billion.



## The ICT market is growing in strength

It is estimated that the value of Poland's ICT exports will be close to €12bn by 2026, compared to €9bn in 2021 (an average annual growth rate of around 3.6%).

The export of ICT services in 2021 amounted to 14,4% of the total export of services from Poland



In 2021 and 2022, such global players as Google, Amazon, Microsoft, Data4 announced further large investments in data centers located in Poland.

With investments of this scale, Poland could become one of the leading data center hubs in the CEE region by 2026.

Sources:

\*Future of IT Report 2023, Emerging Europe

The Most Favoured Offshore CX Delivery Locations, <https://ryanadvisory.com/india-is-2023s-most-favored-offshore-cx-delivery-location/>

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

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

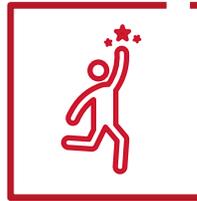
Poland ICT Industry Outlook 2022 – 2026, Report Linker

<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 (600 points in the English Proficiency Index), which places us 13th out of 111 ranking countries.

## An environment of development for programmers

Poland has the largest pool of technology talent in Europe, with 250,000 programmers working here, accounting for 25% of the entire development community in CEE (in 2022)..

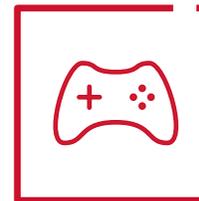


## Your data is secure with us

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, 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 2022  
<https://worldpopulationreview.com/country-rankings/smartest-countries>

# 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 55,000 IT professionals and more than 500 technology companies. Every year Krakow's talent pool grows by 10%.



## We have the best programmers

Poland maintains its strong position in the top three countries with the best programmers in the world.



## More and more software companies

There are currently more than 1,300 software development companies in Poland, increasing by about 10% each year.

Sources:

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

Krakow IT Market Report 2023, Motife

# 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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