

MOTIFE



**2026**  
**Krakow**  
**IT Market**  
**Report**



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# Intro



# MOTIFE

## Michał Piątkowski

CEO at MOTIFE



Krakow's IT talent pool grew by 5% over the past year and has now reached 65 000 specialists. That is roughly 40% more than in 2021. IT specialists now account for almost 12% of everyone employed in the city.

These numbers are not estimates pulled from a distance. Each year, we map Krakow's IT employer base company by company. The picture is clear: Krakow remains one of Europe's most international technology hubs. US companies employ 42% of local IT talent, Polish companies 16%, and French companies 7%, making France the largest EU contributor. Our research also shows that salaries have stabilized. Hiring a new IT specialist is now 1-2% cheaper than a year ago.

Then there is AI.

AI will change the skills expected of IT specialists. It will push universities to redesign parts of their curricula. It will increase the amount of software that companies build. But the deeper question is still open: how will AI change the structure of the IT industry itself?

My bet is that we will need more IT specialists, not fewer. But the profile of those specialists will change. The market will reward people who can combine technical depth, product thinking, domain expertise, and the ability to use AI as an engineering tool rather than a novelty.

Krakow is already adapting. The city is also building momentum in the space sector and paying more attention to dual-use technologies. These - together with AI - are the foundations of the next phase of Krakow's development as a technology hub.

There is also a more strategic question to face. Around 80% of Krakow's IT specialists work for non-Polish employers. This has been a major strength. International companies helped make Krakow globally relevant. But such concentration also deserves attention. The next stage of the ecosystem should include not only more international investment, but also stronger Polish technology companies.

I am proud to present the 2026 edition of the Krakow IT Market Report. Thank you to the MOTIFE team, our partners, and all contributors who made this report possible.

A handwritten signature in black ink, which appears to read 'Michał Piątkowski'. The signature is fluid and cursive, written in a professional style.



# Aleksander Miszalski

Mayor of Krakow



Krakow continues to strengthen its position as one of Europe's leading technology hubs. A strong talent pool, a well-developed academic environment, and a mature labor market make our city an attractive destination for investment and for the development of advanced knowledge-based services.

The information and communication technology sector now plays a key role in shaping Krakow's modern economy. Growing demand for skills in areas such as advanced software development, cloud services, cybersecurity, and data analytics confirms both the dynamic transformation of the labor market and the increasing level of specialization within our ecosystem.

For years, the MOTIFE report has served as a reliable source of insight into the condition and development trends of Krakow's ICT sector. By providing up-to-date data and analysis, it supports entrepreneurs, investors, and public institutions in making strategic decisions, while also helping to identify better the opportunities and challenges facing the local economy.

Krakow's strength lies in collaboration between universities, business, and local government. This cooperation enables us to effectively develop future skills, implement innovative solutions, and create the conditions for long-term, sustainable growth. As a city, we will continue to support the development of modern technologies and invest in infrastructure, education, and quality of life, ensuring that Krakow remains a place where innovation, entrepreneurship, and ambitious global projects can thrive.

A handwritten signature in black ink, reading "Aleksander Miszalski". The signature is written in a cursive style.

# About Krakow

Krakow is Poland's second-largest city and the economic and academic center of the Malopolska region. With a metropolitan population of around 1.5 million, it plays a structural role in the country's economy and serves as one of its most internationally embedded urban markets.

Located in southern Poland, Krakow sits at the intersection of Central and Western Europe. The city is well-connected to major European business hubs via its international airport. It benefits from a time zone that enables smooth collaboration across Europe and a partial overlap with North America. This geographic positioning supports Krakow's role as a coordination point for distributed international operations.

Over the past 25 years, Krakow has developed into a knowledge-driven economy. International companies have established shared service centers, R&D hubs, and centers of excellence employing tens of thousands

of professionals, with a strong concentration in IT, engineering, and advanced business services. As a result, the city has transitioned from a cost-oriented location to one defined by specialized competencies and operational maturity.

Krakow's academic base underpins this model. The city hosts 17 universities and higher-education institutions educating more than 130 000 students annually. Close cooperation between academia and industry supports a steady talent pipeline and applied research.

More recently, Krakow has strengthened its strategic position through artificial intelligence. The city is now part of the European network of AI factories and has been selected as one of two locations in Poland for this initiative. The Krakow AI factory, a specialized, high-performance data center infrastructure, supports AI research, model development, and industry collaboration, positioning the city as an emerging node in Europe's AI ecosystem.

**1.5<sub>M</sub>**  
Population of Krakow  
Metropolitan Area

**2<sup>nd</sup>**  
Largest city  
in Poland

Sources: [krakow.stat.gov.pl](http://krakow.stat.gov.pl), [krakow.pl](http://krakow.pl), 2026





# Przemysław Roth

Chairman at ASPIRE



Krakow has become something that very few European cities have managed to build - a technology and business services ecosystem of genuine scale and genuine depth, one in which many of the largest global companies have chosen to locate and grow operations through successive cycles of economic pressure and strategic change.

Of course, if you are reading this, then the chances are this is something you already know. The question you are looking to answer is rather how is Krakow placed for the next wave of change and transformation - in particular, how ready is Krakow to meet the challenge and opportunity of AI. In which case you have come to the right place, and it is why this report this year is especially timely. The short answer to the question is positive; the long answer contained in the pages of this report is the proof.

To understand what lies behind this, you have to start with the connection between Krakow's IT market and its global business services base. GBS has been the mechanism by which enterprise technology, automation, data capability and digital transformation entered this city and became local competence. That transformation continues - it remains the most important driver of what comes next.

And the ecosystem it has generated is not a fixed thing. It has evolved through the choices and commitments of the organisations operating within it, which is precisely why the intelligence those organisations are willing to share about themselves and their market is so valuable. Reports like this do not produce themselves. The organisations and individuals who contribute data and expert assessment do so because they understand that honest, shared intelligence is a community asset - and that a city willing to interrogate itself honestly has moved to a different stage than one that simply promotes itself.

The fullest praise must go to MOTIFE, whose knowledge of how international technology companies actually find their footing in this city gives this report its particular authority - and who have grown it, over 7 editions, into something this market can rely on.

The key finding of the report - beyond the impressive numbers, beyond let's say the traffic light signals - is the rich complexity of the IT ecosystem in Krakow, some areas mature, some less mature, but existing in a constant state of emergence. That complexity is not a problem to be managed. It is what a living ecosystem looks like - and it is, in the end, the true measure of a place.

Technology is everywhere. Advantage is local.



ASPIRE – Association of IT and Business Services Companies

**ASPIRE** is the association of technology and business services companies operating in Krakow. It is the network that the ecosystem has built around itself - the shared intelligence, the peer exchange, the institutional memory of two decades of multinationals growing, competing, and evolving in this city. ASPIRE does not speak about the market from outside. It is constituted by the people who run it.

[aspire.org.pl](https://aspire.org.pl)

# Focus

## Economic update

### Regional leader, now a trillion-dollar economy

Poland has crossed a defining threshold: with nominal GDP of USD 1.04 trillion in 2025, it is now the 6th-largest economy in the European Union and the undisputed regional leader in Central and Eastern Europe.

#### Stability and resilience

Since joining the EU in 2004, Poland has averaged 3.8% real GDP growth per year for 22 consecutive years – nearly 3x the EU-27 average of 1.4%.

Poland has weathered the recent shock cycle – bringing CPI inflation down to 3.0% in March 2026, and continuing to grow. GDP grew 3.6% in 2025, with the forecast of 3.5% in 2026 – outpacing the EU average. This resilience is underpinned by a diversified industrial base, a flexible exchange rate, and Next Generation EU funds now flowing into public investment through the remainder of the decade.

# USD 1.04<sub>T</sub>

Poland's nominal GDP, 2025

Poland has absorbed roughly 1 million Ukrainian refugees since 2022 with a net-positive fiscal contributions. Over the same period, Russian gas was eliminated from the energy mix, replaced by supplies from Europe (specifically EEA) and expanded LNG capacity, while trade flows have reoriented toward Germany, the US, and Nordic partners.

The Polish Złoty continues to remain stable against the Euro: daily rates have traded in a tight 4.13 to 4.40 band since the start of 2024 – a ~6% range and the most stable period in over a decade.

#### Regional leader

Poland's GDP is 2.5x the size of Romania – the next-largest CEE economy – and roughly equal to Romania, Czechia, and Hungary combined. For Western firms evaluating nearshore destinations, this scale translates into deeper talent pools, more mature service-provider ecosystems, and greater operational resilience than smaller CEE markets can offer individually.

# 3.8%

Average annual real GDP growth, 2004 to 2025

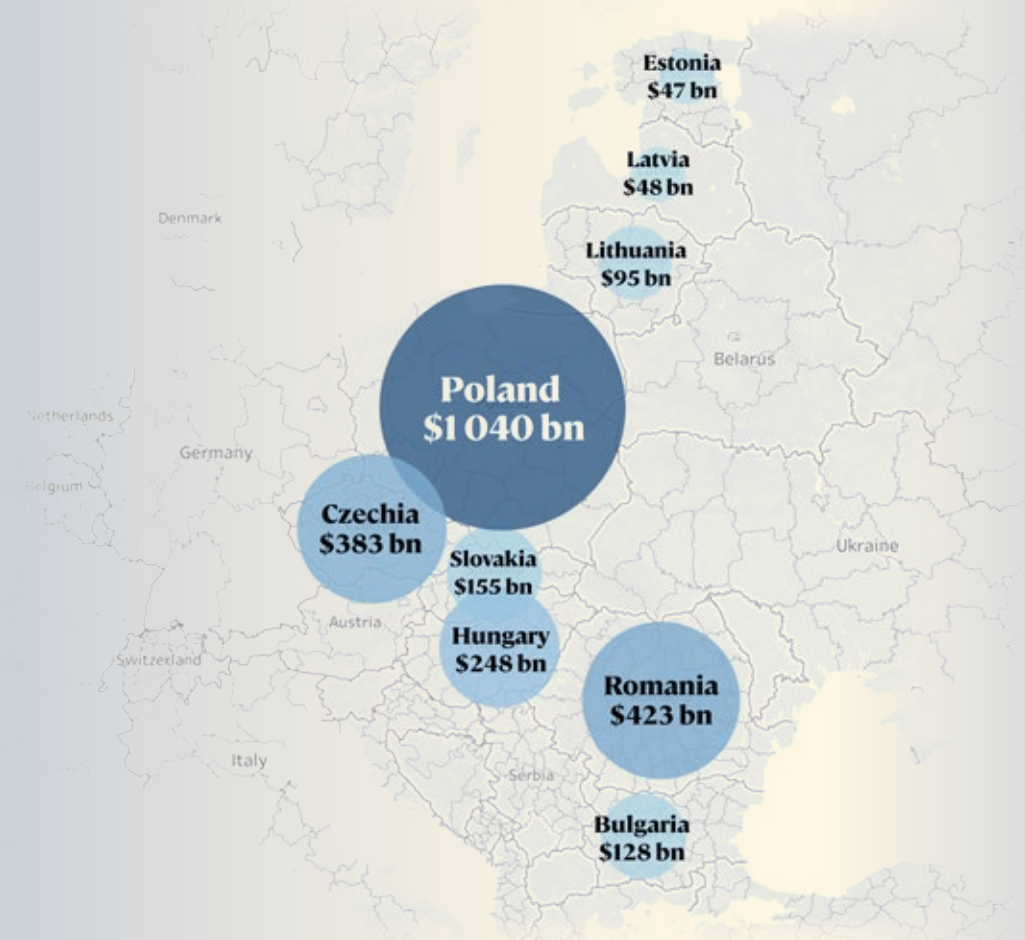
#### Quality of life

The economic changes had significant influence on society. Poles have experienced a notable improvement in the quality of life over the past decades. This progress is reflected not only in rising GDP per capita, but also in significant investments in infrastructure, education, and public services. Poles generally report higher levels of life satisfaction, particularly among younger generations.

# 12<sub>of</sub> 37

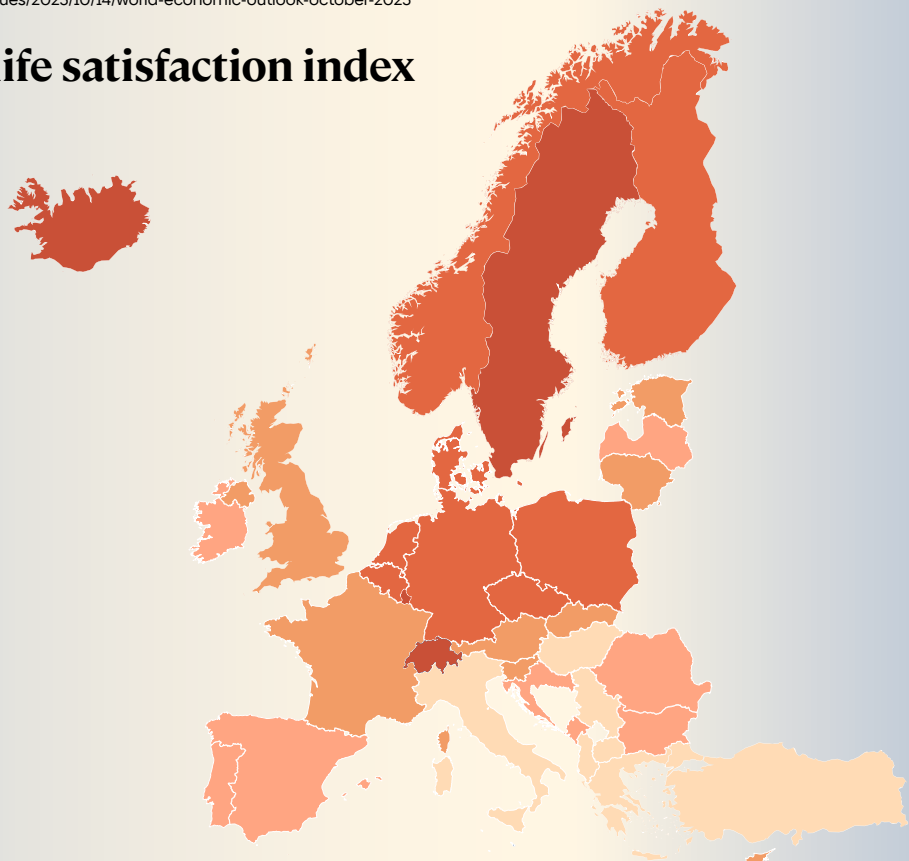
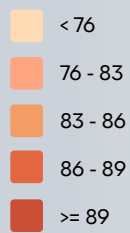
Rank of Poland in Europe by life satisfaction index

## Size of CEE economies (2025)



Source: [imf.org/en/publications/weo/issues/2025/10/14/world-economic-outlook-october-2025](https://imf.org/en/publications/weo/issues/2025/10/14/world-economic-outlook-october-2025)

## Quality of life: life satisfaction index



Source: [ec.europa.eu/regional\\_policy/information-sources/maps/quality-of-life\\_en](https://ec.europa.eu/regional_policy/information-sources/maps/quality-of-life_en)

# Key findings

## Growth of the talent pool

### 65K total in Krakow 5% up YoY

Krakow's IT talent pool has reached around 65 000 specialists, up 5% year over year, driven by both companies' expansion and steady influx of new market entrants.

## ICT graduates

### 2.9K ICT graduates 30% up in 5 years

Krakow's academic pipeline produces around 2 900 Computer Science graduates annually, with the number of ICT students in the city growing by 30% over the past five years.

## Largest IT employer

### Cisco

US-originated Cisco, specializing in networking products, ranks as the largest single IT employer in Krakow, hiring 2 150 IT specialists among the total headcount of 6 500 people.

## International companies

### 250+ in Krakow

International companies play a leading role in Krakow's tech scene, employing 84% of IT talent, led by US firms (42%) and supported by a strong European presence (34%).

## Top countries employing IT talent

### 42% from the US 7% from France (top EU)

The United States leads Krakow's IT market, employing 42% of the talent pool. France is the top EU contributor, with 7%, ranking 4th overall after the United States, Poland and the UK.

## New international IT players

### 12 in the last 12 months

Krakow keeps attracting international companies to settle their IT hubs here. The influx of new companies has stabilized at the level of around 10 - 15 companies a year in the past 2 years.

## Industry clusters

### 10 emerged industry clusters

These sectors employ approximately 43 000 IT specialists, representing 66% of the city's total talent pool and underscoring the strong concentration of expertise across key industries.

## Salaries and demand

### New hires cost on avg 1-2% less 6% attrition

New hires salaries declined by 2% for senior roles and by 1% for mid level specialists - to 17 000 PLN (~4 000 EUR). The attrition level in Krakow companies remained stable at 6%.

## City's innovation pillars

### AI, Dual Use, Space, and Startups

Krakow's refreshed innovation perspective is based on pillars such as AI, dual-use technologies, and the space sector, supported by initiatives including FORT DIANA, the AI Factory, and the Startup Poland Foundation.

chapter 1

# Krakow IT market snapshot



This chapter explores Krakow as a dynamic and growing tech hub, highlighting its skilled IT talent pool, established companies, emerging players, and expanding startup scene. It also offers insights into the city's academic institutions, active tech communities, and events landscape, as well as the evolving office market that supports business growth.

# Why Krakow?

Krakow has become a top destination for international companies looking to grow their IT teams by establishing their own sites. Today, Krakow hosts over 250 international IT hubs, with more than 60 new international tech players having entered the market in the last five years. The following section outlines the reasons for Krakow to be a compelling location.

## Proven business location

### Established tech & business ecosystem

Krakow hosts hundreds of software employers, including large international organizations such as Google, IBM and ABB as well as medium-size and smaller organizations across different industries, originating from over 30 countries. New IT players continue to open their hubs every year.

### Cost-effectiveness

Krakow offers a favorable cost-to-quality ratio for building IT hubs. Engineers in Poland earn, on average, 2.5 times less than their US counterparts. Salaries in Western European markets such as Germany and the UK also remain higher than in Poland. Beyond salaries, Krakow provides cost advantages in other key areas, including office space, utilities, and general business overheads.

### Supportive business environment

Krakow offers a business-friendly environment, supported by public institutions that promote investment and innovation, offering aid for companies entering the local market. Poland provides incentives encouraging foreign investment. R&D centers can benefit from the R&D tax relief, and businesses setting up operations in designated areas, such as the Special Economic Zones, may qualify for income tax exemptions under the Polish Investment Zone program.

### Strategic location and connectivity

Situated in the heart of Central Europe, Krakow offers convenient access to major European cities through a well-connected airport and modern transport infrastructure. The city's location and time zone make it suitable for collaboration with teams in Europe and North America.

## Exceptional IT talent pool

### Scalability

The IT talent pool in Krakow grows each year. This growth is driven by recent graduates, international professionals, and people relocating from other parts of the country and from abroad.

### Maturity

More than 80% of IT professionals have over five years of experience. Most have worked with several international companies of different sizes and cultures.

### Sophistication

Poland is a go-to location for hiring experts in niche tech roles, from software and DevOps engineers to data engineers, scrum masters, product owners, and UI/UX designers.

### Quality

Each year, around 2 900 students graduate with ICT degrees. Combined with a strong STEM education system and the consistently high rankings of Polish engineers, Poland offers the quality of talent that is often unaffordable to companies in their home countries.

### Cultural proximity

Polish professionals share a similar work culture with their Western European and North American counterparts, which makes international collaboration smoother. Shared values around communication, work ethics, and business practices help teams integrate quickly and work effectively across borders.



# Jacek Liguziński

Director of the Entrepreneurship and Innovation Department at Krakow Municipality



## Why Krakow?

For years, Krakow has been strengthening its position as one of the most advanced economic ecosystems in Poland, combining a strong academic base with a rapidly growing business services, technology, and R&D sector. The city particularly stands out in terms of human capital – both employment potential and educational capacity. Krakow's quality of life, well-developed infrastructure, strategic location, and high availability and quality of office space have also long been key advantages. This is reflected in Krakow ranking 1st in the Human Capital and Lifestyle category in fDi Intelligence's European Cities and Regions of the Future 2025.

A strong hub for modern business  
Krakow attracts investors as the home of numerous business centers and companies operating in the modern business services sector. The city hosts 312 business services centers, employing over 107 000 specialists, which represents 22% of the entire BSS workforce in Poland.

## A mature market

Krakow is one of the most important and mature IT hubs in Poland, having completed the full cycle of industry development, from simple outsourcing services to advanced R&D centers, product development teams, and global decision-making

hubs. More than 50 000 professionals in the sector have over 10 years of experience, a unique characteristic that is difficult to find in any other European city.

## A diversified, multi-industry IT ecosystem

Krakow's IT sector spans multiple industries, with strong presence in IT services, telecommunications, software, and finance, together employing over 75% of talent. At the same time, sectors such as travel, retail, manufacturing, and consumer goods drive demand for specialized, domain-focused IT expertise.

## A strong office market

Krakow's office market is the largest regional office market in Poland, with 1.85 million m<sup>2</sup> of office space, representing over 14% of the country's total office stock. More than 420 000 m<sup>2</sup> has been delivered in the past five years alone, ensuring a modern, high-quality office portfolio. Krakow is one of the most attractive cities in Poland for business investment. The city's stable economic foundations and strong position as one of the fastest-growing technology and business services hubs in the country make it a welcoming destination for investors. Our ambition is to continue strengthening this potential and to create an environment where innovative companies can grow, compete globally, and scale successfully.

# Krakow's IT talent pool

## Key figures

**65<sub>K</sub>**

Estimated number of IT specialists working in Krakow region

**2.9<sub>K</sub>**

Computer Science students graduating yearly in Krakow

**37%**

Share of the IT talent pool employed by large, 1000+, IT hubs

**84%**

Share of Krakow IT specialists working in foreign companies

**4<sub>K</sub> EUR**

Median salary of a mid-level software engineer with 3 to 5 years of experience (gross, monthly, nationwide)

**10**

Companies each employing 1 000+ IT specialists

# Spotlight section

## Krakow as an AI hub

This section provides an overview of Krakow's evolving artificial intelligence ecosystem, covering local AI startups as well as international R&D teams developing advanced systems. It also highlights the city's active AI communities, and a significant recent initiative, the AI factory, which aims to strengthen Krakow's position as a key European center for AI development.

Krakow is emerging as one of the leading artificial intelligence hubs in Poland, combining a strong academic base with a rapidly evolving business ecosystem. Recognized in the national AI strategy as a key center, the city is strengthening its role in developing data-driven technologies and advancing AI adoption across industries.

A key milestone in this development is the Gaia AI Factory, a project backed by nearly EUR 70 million in public funding and co-financed by the European Commission. The initiative will introduce a new AI-optimized supercomputer equipped with over 1 000 GPUs, enabling large-scale model training, testing, and deployment. The system is expected to deliver computing power several times greater than the existing Helios supercomputer, positioning Krakow as a critical infrastructure hub for AI development in Poland and the region.

At the same time, global technology leaders such as IBM, Google, ABB, and Ericsson continue to expand AI-related R&D activities in Krakow, spanning enterprise software, cloud computing,

telecommunications, and robotics. This is complemented by strong adoption on the local side, with companies like InPost and Comarch applying AI in large-scale operations.

The ecosystem is further strengthened by a growing startup scene supported by venture capital. Companies such as Skarbe, which secured USD 600K in pre-seed funding, and Replenit, which raised USD 2.5M for AI-driven marketing solutions, highlight the ability of Krakow-based teams to attract international investment.

Alongside them, AI startups like Airly, Intelliseq, and Orbify demonstrate strong specialization across climate tech, medtech, and geospatial analytics.

Equally important is the role of local communities supporting collaboration and talent development. Organizations such as GenAI Krakow, Krakow AI Meetup, or Krakow Robotics & AI Club contribute to knowledge exchange and ecosystem growth.

# 37 PFLOPS

Computing power of the Helios supercomputer at AGH Cyfronet

# 78%

Of Krakow companies have AI software development tools officially deployed and integrated into their process, N = 23



# Dominika Walec

Plenipotentiary of the Mayor  
of Krakow for Business Cooperation



**Krakow is entering a new phase of strategic acceleration-one in which AI becomes the defining layer of value creation.**

The city has exceptionally strong scientific and economic foundations, providing a powerful launchpad for AI-driven growth. At the same time, as highlighted in Anthropic's recent report by M. Massenkoff and P. McCrory, "Labor Market Impacts of AI: A New Measure and Early Evidence" (2026), real-world AI adoption still covers only a fraction of what is technically possible - indicating that the most significant wave of productivity gains is still ahead. This gap between potential and implementation creates a unique window of opportunity for cities like Krakow to position themselves at the forefront of applied AI transformation, leveraging both talent and institutional capacity.

Krakow is uniquely positioned to lead this wave. With GBS workforce of 120 000 people, including more than **50 000 specialists with over a decade of process expertise**, the city offers a concentration of talent capable of training AI systems and building value-added digital solutions at scale. This evolution is already visible: Krakow hosts over **65 000 IT professionals** and is shifting from delivery to strategic development across global organizations.

The city's AI infrastructure is equally transformative. Cyfronet AGH, home to Poland's fastest supercomputers, is becoming a European-level **AI Factory**, backed by **EUR 70 million** and focused on such areas as healthcare, space technologies, and large language models. Meanwhile, **Cisco's new 4-MW data-center investment** (PLN 200 million) adds critical R&D capacity for AI, cloud, and sustainable computing – and signals strong corporate commitment to Krakow's innovation ecosystem.

Krakow's startup ecosystem, with **50+ AI startups** and global-scale innovators like Synerise, IntoDNA provides another engine of growth, with emerging synergies between founders and enterprise hubs. Cisco's startup-focused initiatives only strengthen this alignment.

Add to this the natural convergence with Krakow's high-value sectors, **life sciences, space, and dual-use technologies**, and the availability of large investment plots at **Nowa Huta Przyszłości**, ideal for data centers and next-generation AI gigafactory infrastructure, and the city's trajectory becomes clear:

**The vision is clear and executable: a city where world-class infrastructure, vertical sector expertise, and nearly 3 000 annual IT graduates converge into a self-reinforcing innovation engine – one that shapes European AI, rather than simply adopting it.**

## Focus

# AI factory in Krakow

Krakow is set to strengthen its position as one of the leading AI hubs in Poland and Europe with the development of the Gaia AI Factory. Approved by EuroHPC JU in 2025, the project has a total budget of around EUR 70 million, financed jointly by the European Commission and the Polish government. It is being developed at the Academic Computer Centre Cyfronet at AGH University of Science and Technology, with full operations expected in 2026.

The Gaia AI Factory will function as a high-performance computing platform for AI research and deployment. Its role is to provide the infrastructure needed to train, test, and scale advanced AI systems. The project expands Cyfronet's computing capacity beyond the Helios supercomputer and adds new AI-focused infrastructure equipped with more than 1 000 next-generation GPUs.

Source: cyfronet.pl, MOTIFE Insights 2026.

The facility is intended to support researchers, public institutions, start-ups, and commercial users. Its priority areas include healthcare, space technologies, and large language models. It will also support the development of Polish-language AI models and their use in public services, strengthening Poland's digital autonomy and enabling more advanced AI applications in the public sector.

Gaia AI Factory will also strengthen Poland's position in the European AI infrastructure landscape. Through cooperation with institutions such as NASK, OPI, and other research and implementation partners, it is designed to connect computing infrastructure with research, commercialization, and public-sector use cases. The project is also aligned with the EU AI Act, with a focus on trusted, secure, and transparent AI systems.



SYNERISE

# Jarosław Królewski

CEO and Founder at Synerise



Krakow has evolved from a traditional outsourcing destination into one of Central and Eastern Europe's most important hubs for advanced data engineering and artificial intelligence development.

Over the last few years, the local technology ecosystem has increasingly shifted toward high-value competencies related to machine learning, cloud infrastructure, predictive analytics, and generative AI. This transformation is driven not only by global technology companies operating in the region, but also by locally founded firms building proprietary AI products and platforms with international ambitions.

One of the most visible changes in the IT market is the growing importance of data-centric architectures and real-time decision systems. Companies are investing heavily in technologies that allow them to process massive volumes of behavioral and operational data in order to automate business decisions, improve customer experience, and optimize internal processes. As a result, demand for specialists in AI engineering, MLOps, data infrastructure, and large-scale distributed systems continues to grow rapidly.

The rise of generative AI is accelerating this transition even further. Organizations are no longer treating AI solely as an experimental innovation area, but increasingly as a core business capability. This creates new opportunities for Krakow's technology sector, particularly because the region combines strong engineering talent, academic research capabilities, and international business experience.

In the coming years, Krakow is likely to strengthen its position not only as a delivery center for global corporations, but also as a place where advanced AI products and foundational technologies are created and developed at scale.

## Selected large companies developing AI products in Krakow

Company	Country of origin	AI focus areas	AI products/services summary
<b>IBM</b>	USA	Enterprise solutions	IBM's Poland Software Lab in Krakow is the company's first and largest innovation hub in Central and Eastern Europe, focusing on developing AI solutions for enterprise applications.
<b>ABB</b>	Switzerland	Robotics and automation	ABB's Corporate Research Center in Krakow specializes in industrial robotics and automation, advancing AI-enabled robots and machine learning for autonomous navigation.
<b>Ericsson</b>	Sweden	Telecommunications	Ericsson operates one of its largest R&D centers in Krakow, employing over 500 engineers to develop AI-driven solutions for 5G and telecommunications networks.
<b>Aptiv</b>	Ireland	Automotive	Aptiv in Krakow develops advanced mobility solutions, including AI- and machine learning-based systems for driver monitoring and intelligent vehicle technologies
<b>Google</b>	USA	Cloud AI, Infrastructure	Google's Krakow engineering team contributes to the development of AI-enabled cloud computing products and tools.
<b>Motorola Solutions</b>	USA	Public safety	Motorola Solutions' Krakow R&D center develops mission-critical communication and security technologies, including AI-driven video security and data analytics solutions.
<b>InPost</b>	Poland	Logistics	InPost uses AI for real-time logistics optimization, customer service, and document digitization, prioritizing practical, efficient solutions over complexity.
<b>Nokia</b>	Finland	Telecommunications, Networking	Nokia's Krakow technology center contributes to the development of next-generation telecom solutions, including AI-RAN and AI/ML tools supporting the evolution of 5G and 6G networks.
<b>GE HealthCare</b>	USA	MedTech	GE HealthCare's Krakow center focuses on developing AI applications for medical imaging and diagnostics to enhance patient care.
<b>HERE Technologies</b>	Netherlands	Location services	HERE Technologies leverages AI to improve mapping and location-based services, with R&D operations in Krakow contributing to these advancements.

Source: MOTIFE Insights 2026



# Krystian Sperka

Vice President at Tenarai



**When Tenarai opened its Krakow centre in 2020, we bet on a city known for technological excellence. Six years on, the results speak for themselves.**

Powered by Ignis, our proprietary AI platform, and our Agentic AI frameworks, we turn AI potential into measurable business impact, guiding enterprises from ideation to scale. Our AI & Cloud CoE supports 20+ global clients across travel, insurance, and technology with custom-built AI solutions that drive speed, productivity, and tangible business outcomes.

We walk the talk when it comes to AI implementations. For a travel tech company, we deployed an AI-supported customer assistant to automate insights and improve query resolution, reducing triage time by 50%, improving ticket deflection by 20%, and accelerating resolution time by 30%. A leading Food & Beverage brand achieved success with an AI-powered insight engine we built, leveraging NLP to surface consumer-brand data and deliver a holistic view that sharpened decision-making with actionable insights.

For a global retail brand, we used GenAI to build a defect-prevention platform that aggregates data from 25 sources into a single view of top defects, streamlining information flow and enabling smarter resource allocation. One of our largest successes was with a global logistics brand, helping them migrate from ETL graphs to PySpark notebooks using an automated tool, seamlessly moving 7+ years of data. By combining data lakes and data warehousing with Azure integration, our solution delivered 40% faster reporting and analytics, and increased data transformation efficiency by 30%.

2026 is the year of Enterprise Scale Agentic AI. As we enter this future, our diverse, expertise-rich workforce in Krakow will take the lead. And we're growing!

Our Talent Acquisition Team is focusing on new-age roles such as Forward Deployed Engineer and Agentic Design Lead, which will be crucial to building an AI-ready workforce with local talent to power our global aspirations.

## Selected Krakow start ups developing AI solutions

Company	AI focus areas	AI products/service summary
<b>AILIS</b>	Medtech	Developer of a non-invasive breast health monitoring system. This system uses Dynamic Parametric Imaging (DPI) and AI algorithms to detect changes in breast tissue.
<b>Brainly</b>	EduTech	Global peer-to-peer learning platform for students, now integrating AI as a personalized “AI learning companion” for homework help.
<b>Synerise</b>	Marketing automation	AI-driven customer data platform for large enterprises – collects and analyzes behavioral data to automate personalized marketing, loyalty, and pricing in real time.
<b>Lekta AI</b>	Customer service	Conversational AI solutions for customer support and business communication, combining LLM-based and neurosymbolic technologies to automate interactions and improve service quality.
<b>Civer</b>	Computer vision	Developer of AI software for film restoration, video enhancement, and image upscaling, helping improve visual quality and automate post-production processes.
<b>Digital First AI</b>	Marketing	AI platform that automates creation of marketing strategies and ad content – analyzes company data and trends to generate campaign plans and copy, saving marketers time.
<b>Elmodis</b>	Machine monitoring	Integrated hardware–software solution that uses AI to monitor industrial machinery performance and predict failures, improving operational efficiency.
<b>Cardiomatics</b>	Medtech	Cloud AI platform that automates ECG interpretation – detects ~20 heart abnormalities and generates diagnostic reports in minutes.
<b>MedApp</b>	Medtech	Developer of CarnaLife platform – FDA-approved software using mixed reality 3D holograms for medical imaging and AI analytics, plus a telemedicine system for remote patient monitoring.
<b>Mentalio</b>	Medtech	Mentalio uses AI to support the early diagnosis of mental health disorders in children and adolescents, empowering kids, parents, and specialists to take control of emotional well-being through innovative technology.
<b>Vivis Mind</b>	Medtech	Developer of a smartphone-based platform using voice analysis algorithms to detect and monitor cognitive disorders like dementia. Delivers results in under 5 minutes and integrates easily into existing medical workflows.

Source: MOTIFE Insights 2026

# Use of AI tools in SDLC

This section is based on survey data collected from IT leaders representing 23 organizations operating in Krakow. The analysis focuses on how engineering teams are adopting AI in daily development work, what governance models are emerging, where measurable business value is observed, and what barriers companies face when scaling usage.

## AI usage: adoption and organizational approach

AI adoption in Krakow-based companies has largely moved beyond the experimental phase and become part of day-to-day operations. Most companies already use AI tools in their development processes, showing that AI is no longer a future capability, but a current operational standard.

At the same time, organizational policies are still evolving, with many companies transitioning from individual experimentation toward more structured, company-wide adoption.

# 78%

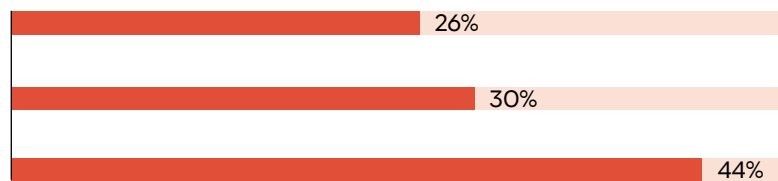
Surveyed companies report that AI tools are integrated into development process.

### AI usage policy

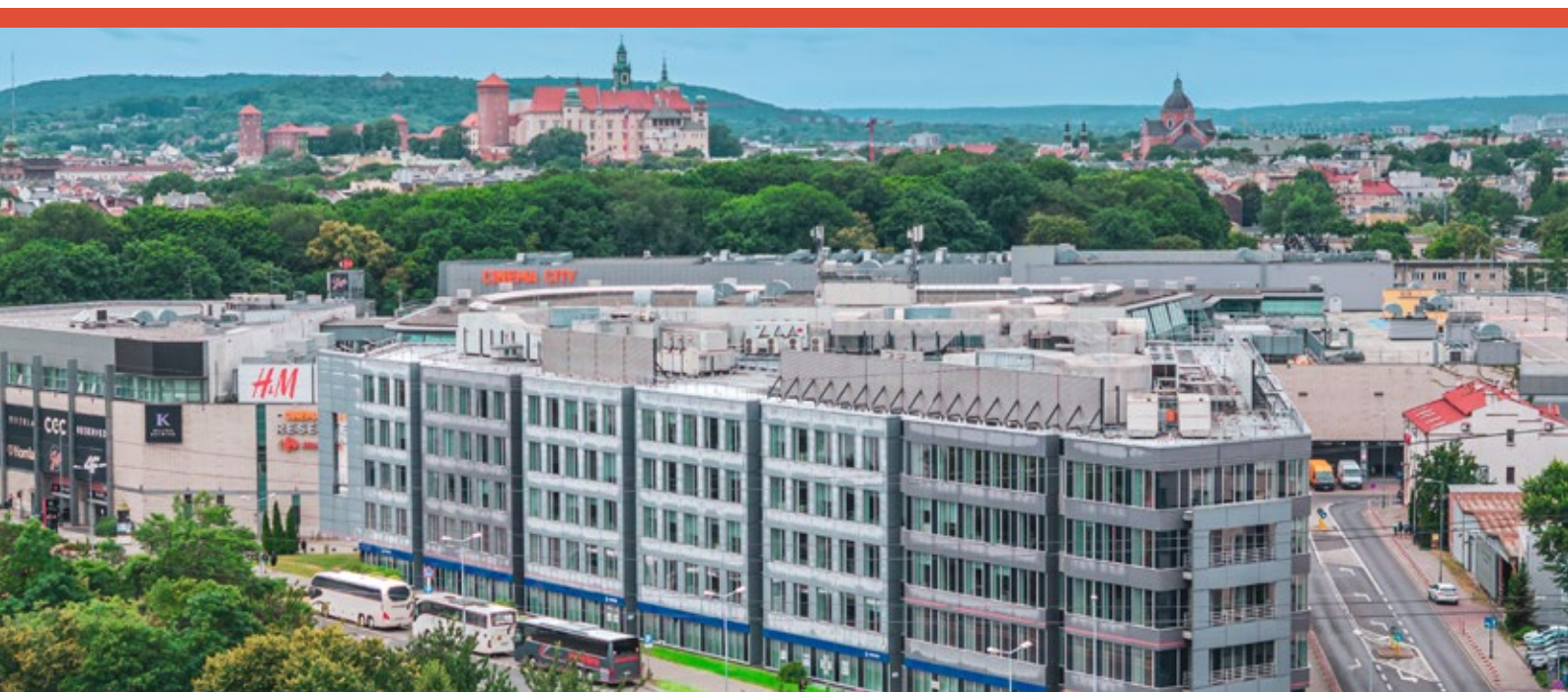
Mandatory (Developers are required to use specific AI tools)

Voluntary (Developers may use AI tools at their discretion)

Transitional (Currently voluntary, but we plan to make it mandatory soon)



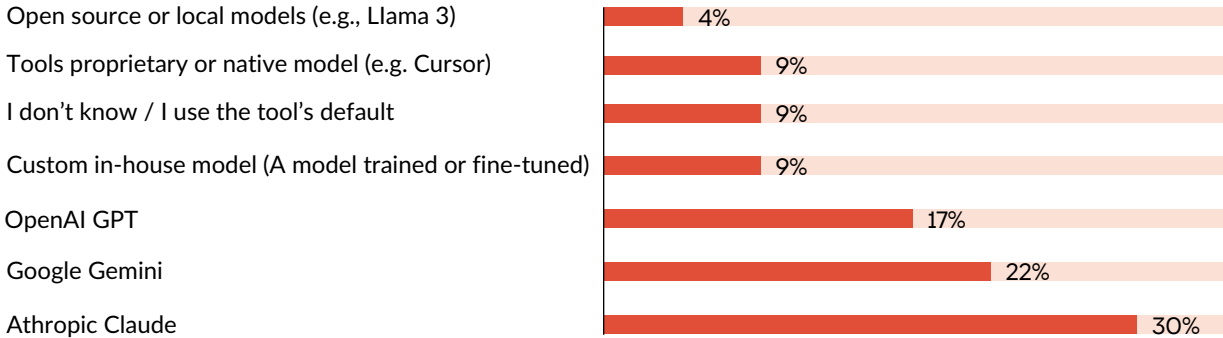
Source: MOTIFE Insights 2026, AI adoption in Krakow companies survey, 2026, N=23



# Preferred AI models

The data shows a diversified AI landscape, with companies relying on multiple leading providers rather than a single dominant ecosystem. At the same time, the adoption of custom in-house models, proprietary solutions, and open-source tools remains relatively limited.

## AI models

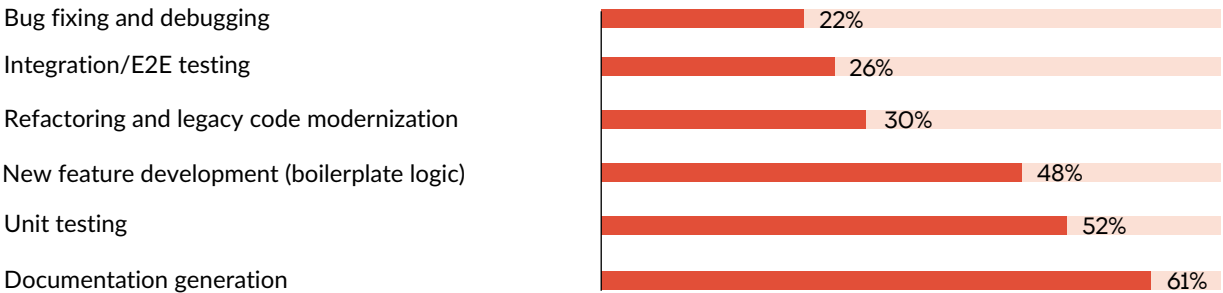


## AI ROI by use case

The highest efficiency gains from AI are seen in routine, repeatable development tasks, particularly documentation, testing, and feature development. More complex areas such as refactoring, integration testing, and bug fixing show lower impact.

At the same time, a notable share of companies either does not track AI ROI or have not yet observed clear efficiency gains.

## AI ROI by use case

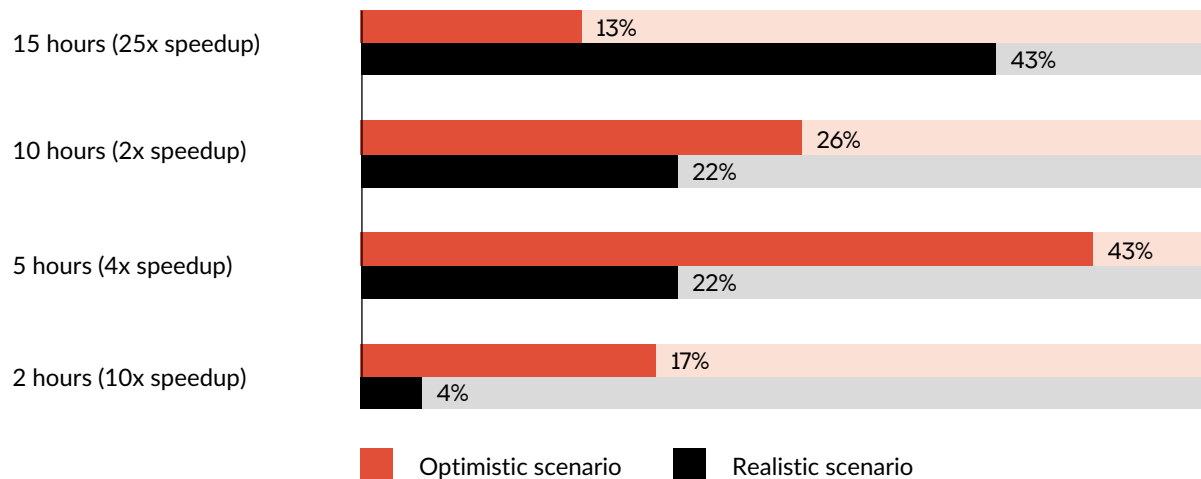


Source: MOTIFE Insights 2026, AI adoption in Krakow companies survey, 2026, N=23

## AI impact on task execution time

The data highlights a clear gap between optimistic expectations and the typical outcomes of AI usage. While some companies report significant gains in best-case scenarios, particularly in highly automated tasks, real-world results are generally more moderate.

In practice, companies most often achieve incremental efficiency improvements rather than transformational speedups, although a smaller group reports substantial productivity gains in selected use cases.



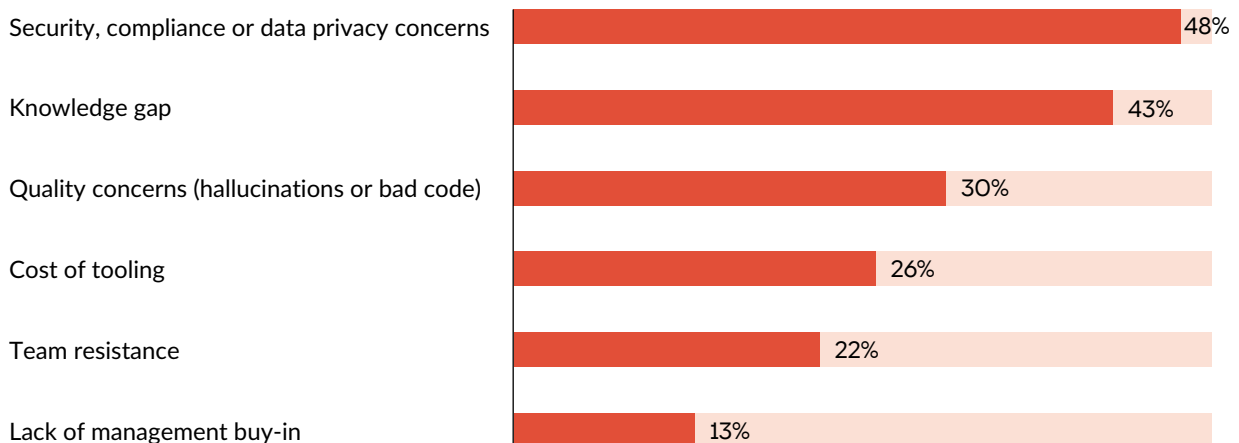
Source: MOTIFE Insights 2026, AI adoption in Krakow companies survey, 2026, N=23

## Barriers to AI adoption

The main barriers to AI adoption are linked to risk, internal capabilities, and organizational readiness rather than cost alone. Security, compliance, and data privacy remain the biggest challenges, alongside knowledge gaps and concerns about AI reliability.

Overall, the key constraints are tied to trust, expertise, and the safe integration of AI into existing processes.

### AI adoption barriers



## AI upskilling approaches

AI upskilling is primarily driven by internal and flexible learning formats, with companies focusing on continuous, accessible skill development rather than formal centralized programs.

Overall, organizations rely on a mix of internal knowledge sharing, self-paced learning, and vendor-supported training to build AI capabilities.

### AI upskilling approaches

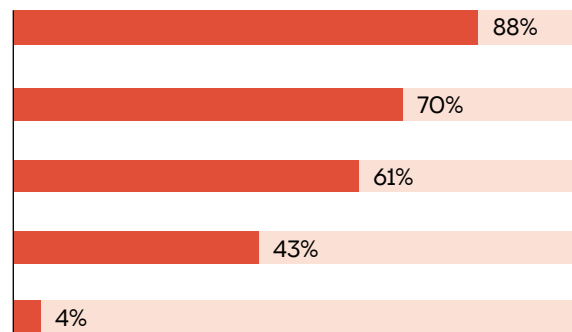
Internal knowledge sharing (brown bag sessions, internal workshops run by employees)

Self-paced (Access to platforms like Udemy, Pluralsight or Coursera)

Vendor-specific training (official training from Microsoft (Copilot), GitHub or other tool providers)

External training (paid courses, conferences or certifications provided by vendors)

None (employees are expected to upskill themselves)



Source: MOTIFE Insights 2026, AI adoption in Krakow companies survey, 2026, N=23

## Limitations of this research

This analysis is based on a relatively small sample size, which may limit the generalizability of the findings across the broader market. Additionally, the field of AI is evolving rapidly.

Tools, capabilities, and adoption patterns change quickly, meaning that some of the insights presented may become outdated in a short period of time.



# MOTIFE

**Hire niche AI talent  
with a local partner.**

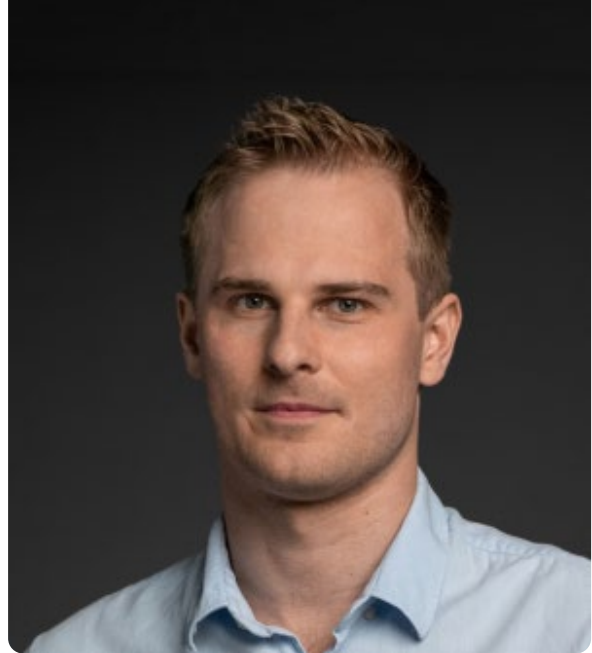


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# Konrad Bujak

Founder at CEE AI Hub



The community around generative AI in Krakow represents a structured and increasingly visible layer of the city's technology ecosystem, built around recurring events, academic institutions, and practitioner-led initiatives.

At the grassroots level, communities such as Krakow AI Meetup show consistent engagement, with over 600 members and regular in-person events attracting 70–90 participants. Alongside this, initiatives like GenAI Cracow indicate a more specialized, engineering-focused approach, covering areas such as LLM operations, data preparation, and multi-agent systems. This reflects a shift from general discussion toward building production-ready solutions.

This activity is supported by a strong academic backbone. AGH University of Science and Technology, through initiatives like the Center of Excellence in Artificial Intelligence, plays a key role in connecting research with industry. Events such

as AGH AI Days and AI for Science Krakow create regular interaction between researchers, students, and practitioners, ensuring that developments in generative AI translate into practical use cases. The AI ecosystem also extends into the broader developer community. Events such as “Build with AI” and local hackathons focused on generative models highlight an emerging builder culture, where experimentation and product development are central. This aligns with Krakow's position as a mature tech hub, where communities are closely linked with companies and startup networks. From an infrastructure perspective, national-level AI investments around AGH and Cyfronet further strengthen the ecosystem, providing long-term support for its development.

Overall, the AI community in Krakow can be seen as a network of engineers, researchers, and founders connected through events, academia, and industry. While its exact scale is difficult to quantify, its consistency and institutional support indicate that it is becoming a stable and growing part of the city's tech landscape.

## Selected AI communities and events in Krakow

Name	Category	Short description
<b>Krakow AI Meetup</b>	Community	A Krakow-based meetup group exploring generative AI and ML, launched in late 2024. Has held two events to date, attracting tech professionals and enthusiasts. <a href="http://www.meetup.com/krakow-technology-society-meetup-group/">www.meetup.com/krakow-technology-society-meetup-group/</a>
<b>Cracow Robotics &amp; AI Club</b>	Community	A community focused on robotics, AI, and IoT. Active since 2022 with regular meetups for tech practitioners, hobbyists, and academics. <a href="http://www.meetup.com/cracow-robotics-ai-club/">www.meetup.com/cracow-robotics-ai-club/</a>
<b>AI Safety Polska – Krakow Local Group</b>	Community	A local community exploring AI safety and long-term risks. Hosts regular discussions for engineers, students, and researchers. <a href="http://www.meetup.com/ai-safety-polska-krakow-local-group/">www.meetup.com/ai-safety-polska-krakow-local-group/</a>
<b>GenAI Krakow</b>	Community	A Krakow-based meetup group focused on generative AI. Launched in late 2024, and has held multiple events for professionals and enthusiasts. <a href="http://www.linkedin.com/company/genai-cracow/">www.linkedin.com/company/genai-cracow/</a>
<b>AI for Science Krakow</b>	Event	A major conference held on March 21, 2025, focused on AI in scientific research. Organized by the Polish Ministry of Science and AGH Cyfronet. <a href="http://www.kpk.gov.pl/wydarzenia/konferencja-ai-for-science-krakow">www.kpk.gov.pl/wydarzenia/konferencja-ai-for-science-krakow</a>
<b>CyberSecurity AI Days</b>	Event	A one-day event at AGH in January on the intersection of AI and cybersecurity. Included talks by IBM and AWS, as well as academic presentations. <a href="http://www.agh.edu.pl/wydarzenia/detail/s/cybersecurity-ai-days">www.agh.edu.pl/wydarzenia/detail/s/cybersecurity-ai-days</a>
<b>AGH AI Days</b>	Event	The third edition of AGH AI conference, scheduled for May. Features workshops and lectures led by students, academics, and industry experts. <a href="http://www.agh.edu.pl/studenci/wydarzenia/detail/s/agh-ai-days-1">www.agh.edu.pl/studenci/wydarzenia/detail/s/agh-ai-days-1</a>

Source: MOTIFE Insights 2026

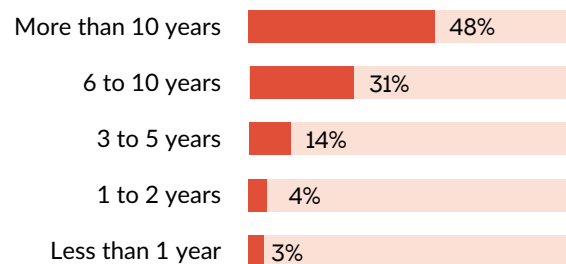
# Krakow's IT talent pool

## Demographics and skills

### Seniority

Krakow's developer community is marked by a high level of seniority, with almost a half bringing over 10 years of professional experience. This suggests a mature talent pool capable of handling complex projects and contributing at a strategic level. At the same time, thanks to the steady influx of young STEM graduates, a significant portion of the talent pool are young professionals with less than 10 years of experience.

### Estimated distribution of developers in Krakow by years of experience



### Education

Polish IT professionals tend to be well-educated, with a strong foundation in technical disciplines. In Krakow, 75% of IT specialists hold degrees in computer science or related fields. This reflects the strength of Poland's educational system, particularly in STEM (Science, Technology, Engineering, Mathematics) areas, where universities are known for consistently producing skilled and well-prepared graduates for the tech industry.

### Gender

As in many parts of the world, the IT sector in Krakow and across Poland has been male-dominated, with roughly 82.5% of professionals male and 17.5% female. However, the gender balance is gradually shifting. A positive sign of this change is the growing participation of women in ICT education, reaching up to 45% in disciplines such as Data Engineering and Analysis, indicating a more inclusive future for the industry.

### English proficiency

English proficiency among IT professionals in Krakow remains high and continues to support collaboration within international teams. In the 2025 EF English Proficiency Index, Poland ranked 15th globally, maintaining a "high proficiency" classification and reinforcing the country's position as a reliable location for globally integrated technology operations.

# #15<sub>/123</sub>

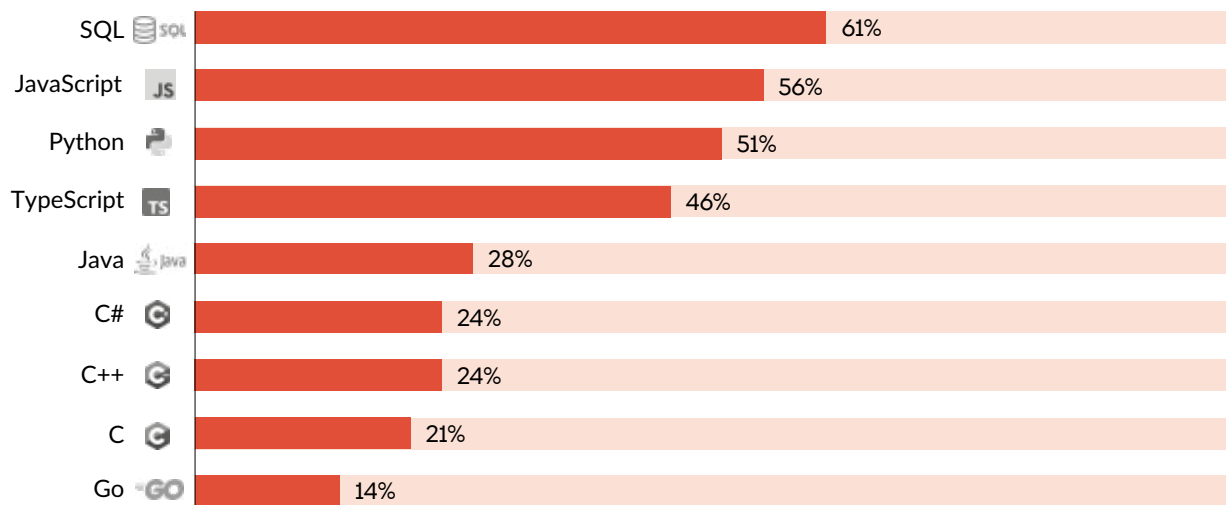
Rank of Poland in 2025 EF English Proficiency Index, out of 123 countries

Sources: MOTIFE Insights 2026, LinkedIn, Eurostat, EF Education First.

# Tech skills

The most common programming language skills among Polish professional developers are SQL, JavaScript and Python. The chart below presents self-reported professional experience with leading technologies, based on data from the 2025 Stack Overflow survey.

## Share of developers in Krakow having experience with a specific programming language



Sources: Stack Overflow's 2025 Developer Survey of 1250 Polish professional developers.





# Michał Kucharczyk

AI and Automation Director at PwC



**Krakow's IT talent market is entering a new phase. The shift is no longer from simple to complex delivery, but from narrow specialization toward broader, more integrated roles.**

In practice, this means companies increasingly need people who combine technical foundations with the ability to work across architecture, process, AI tools, and business context. A developer is no longer expected to focus only on one language or one task. The value lies in understanding how to use AI well, where to apply it, how to supervise it, and how to connect it with real organizational needs.

This change is visible across functions. In software engineering, AI already supports coding, testing, and iteration. In operations and service environments, it can shorten onboarding, improve productivity, and help teams handle repetitive tasks faster. At the same time, companies are becoming more aware that speed alone is not enough. AI must be implemented with the right architecture, governance, cybersecurity, and regulatory oversight. Otherwise, it creates more risk than value.

This has direct implications for talent in Krakow. The market continues to benefit from strong academic foundations, especially in mathematics, computer science, and English proficiency. Local universities produce graduates

with solid fundamentals, while companies add the practical layer through internships, experimentation, and on-the-job learning. As a result, Krakow is well-positioned for the next stage of IT development: not only building delivery teams but also developing AI Centers of Excellence, product roles, architects, and specialists who can orchestrate increasingly automated environments.

This shift also changes the outlook for junior talent. The market may need fewer entry-level roles based on repetitive execution, but it still needs young professionals who understand foundations, can learn fast, and can work with AI tools in a structured way. In that model, junior talent is not disappearing. It is being redefined around coordination, problem framing, and value creation. For Krakow, this is an advantage. The city combines mature engineering talent with a younger generation that is comfortable experimenting with new tools, making it a strong base for the next wave of IT and AI-driven roles.

As AI continues to reshape the industry, value is increasingly defined by how effectively technology is used to solve real business problems. This is why diverse leadership is no longer optional—it is a strategic necessity. Supporting women in IT is not only the right thing to do; it is essential for building a strong, competitive, and future-ready tech ecosystem in Krakow.

# IT talent by IT hub size

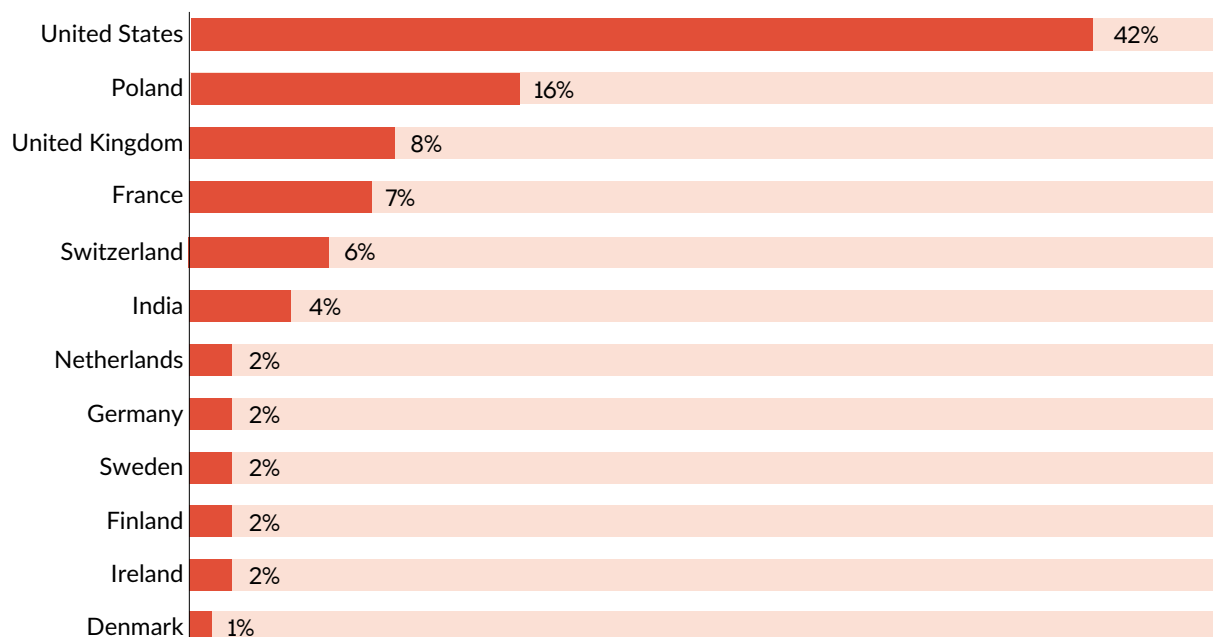
There are over 500 companies employing a total of 65 000 IT specialists in Krakow. The IT landscape is dominated by small and mid-sized companies, with 77% of firms employing up to 100 people. Large enterprises with over 1 000 employees make up just 3% of companies but account for 37% of the IT talent. Mid-sized firms with 101–500 employees employ 31% of IT specialists.

## Overview of companies employing IT specialists in Krakow, by IT hub size

Company size (IT FTE)	% of total companies	Share of IT talent pool
1-10	21%	1%
11-100	56%	18%
101-500	17%	31%
501-999	2%	13%
1000+	3%	37%

# IT talent by companies' origin

American companies employ the largest portion of Krakow's IT workforce, accounting for 42% of the total IT talent pool. Western European firms also make up a substantial share, with United Kingdom contributing 8%, France 7% and Switzerland 6%. Meanwhile, Polish companies represent 16% of the workforce, highlighting the dominant role of the international hub in the local IT market.



Source: Dataset by MOTIFE Insights 2026

## Focus

# Women in IT in Krakow

The continued growth of Krakow's IT market, the sector remains structurally male-dominated. However, gender diversity is increasingly recognized as a strategic factor for long-term talent availability and business performance.

Recent data indicate that women on average account for approximately 21% of IT workforce in Krakow, compared to around 17.5% nationally. This positions Krakow among the more progressive tech hubs in Poland, although the gap remains significant.

Beyond overall representation, the focus increasingly shifts toward the share of women in senior and leadership roles. Companies are moving from awareness-driven initiatives to more structured approaches, including mentorship programs, internal mobility frameworks, and targeted leadership development.

Krakow's ecosystem actively supports this shift through a growing network of communities and initiatives. Organizations such as Women in Technology Poland (including the Tech Leaders mentoring program), Mamo Pracuj w IT

(supporting career transitions and return-to-work paths), and technical communities like Girls.js, PyLadies, or Rails Girls provide access to mentoring, reskilling, and peer learning.

While such promotional efforts are important for raising awareness, they may not fully reflect the industry's actual gender diversity. Ultimately, the true measure of gender diversity in IT is reflected in the hard data, the share of women in the IT headcount.

### Survey on women in IT

The analysis, based on data from 60 Krakow-based IT companies, reveals several notable trends in gender representation. There is significant variation among companies, with those at the top end employing women in IT roles at a rate nearly three times higher than those at the bottom. Company size appears to be a contributing factor, as larger organizations (those with over 100 IT specialists) tend to report a higher share of women in technical roles. Additionally, the average female representation among the surveyed companies stands at approximately 21%, which is above the Polish national average of around 17.5%.

# 17.5%

Share of women in IT countrywide

# 21%

Average female representation among the surveyed companies



# Anna Szwiec

President at the Association Women in Technology Poland



The IT industry is rapidly evolving toward greater specialization, deeper expertise, and broader adoption of AI. In this context, strong leadership has become the true differentiator. Bringing more women into tech is therefore essential to building resilient, innovative environments that can grow, scale, and remain competitive.

Women currently make up around 17.5% of IT professionals in Poland and approximately 21% in Krakow, according to industry surveys. The wide variation across organizations (5-50%) highlights significant untapped potential, particularly in technical and leadership roles.

Ecosystem-driven initiatives play a critical role in developing a strong pipeline of future female leaders. The Women in Technology community, led by the Imagine Inclusive Technology Foundation, provides practical, hands-on support to women in the industry. Increasing visibility, amplifying the female perspective, building relevant skills, and fostering partnerships are key for companies that want to stay ahead.

The Be Visible in IT program addresses major barriers to career advancement, such as limited access to expert and decision-making roles. It focuses on developing practical leadership

skills—including strategic communication, public speaking, and personal branding—that are often underrepresented in existing support structures. After all, even the best ideas only matter if they are heard.

The first edition of the program exceeded expectations. Participants became more confident and visible, actively engaging in the tech community by speaking at conferences, contributing to industry discussions, and sharing their expertise. The program also creates a powerful ripple effect: graduates return to co-organize future editions and support new participants, fostering a strong sense of ownership and shared purpose.

While people remain at the heart of the program, scaling its impact required a new approach. This led to the creation of Luma.

Built on over 11 years of experience from the Tech Leaders mentoring program, meetLuma leverages generative AI to expand access to mentoring. It supports women's leadership development by providing continuous guidance and helping build skills essential for senior roles in a rapidly changing tech landscape.

Luma addresses one of the key limitations of traditional mentoring: scalability. As a virtual mentor, it enables continuous, on-demand learning through a multi-agent system and

thoughtfully designed interactions that maintain high quality and relevance. It also reflects a broader shift in the industry—the ability to work effectively with AI is becoming a critical skill for career growth.

From a wider ecosystem perspective, these initiatives deliver impact across three key areas: developing future leaders, building capabilities such as AI fluency and adaptability, and fostering more inclusive organizations that drive innovation.

As AI continues to reshape the industry, value is increasingly defined by how effectively technology is used to solve real business problems. This is why diverse leadership is no longer optional—it is a strategic necessity.

Supporting women in IT is not only the right thing to do; it is essential for building a strong, competitive, and future-ready tech ecosystem in Krakow.



## Largest employers of women in IT in Krakow

#	Company	Industry	Share of women among IT employees	Total number of women ▼
1	HSBC	Finance	34%	578
2	Comarch	Software	30%	510
3	EPAM	IT Consulting, IT Services	35%	508
4	Motorola Solutions	Telecommunications	17%	289
5	IBM	Software	29%	289
6	Cisco	Telecommunications, Networking	12%	260
7	Sii	IT Consulting, IT Services	24%	228
8	ABB	Engineering, Manufacturing	30%	180
9	Zendesk	Software	38%	146
10	Akamai	IT Consulting, IT Services	20%	113
11	Pegasystems	Software	25%	113
12	Lufthansa	Transport, Logistics, Aviation	50%	110
13	GE Healthcare	Health, Medical	37%	75
14	Keepit	IT Consulting, IT Services	46%	70
15	Genuine Parts Company	Engineering, Manufacturing	20%	67

Source: Dataset by MOTIFE Insights 2026

# Large companies

## The largest IT employers in Krakow

### Industries and countries of origin

Among Krakow's 30 largest IT employers, the top industries by IT headcount are IT Consulting and IT Services, Telecommunications and Networking, and Finance. The telecom cluster, led by Cisco, Motorola Solutions, Ericsson, and Nokia, accounts for more than 5 900 IT roles. Finance hubs such as HSBC, UBS, and StoneX employ about 4 000 IT specialists, reflecting the strong presence of banking and fintech operations in the city. IT services firms, including HCL Technologies, EPAM Systems, Capgemini, and Sii, remain the largest segment overall, employing over 8 100 IT professionals.

By origin, the US-headquartered companies dominate, making up over one-third of the list. European firms also have a strong presence, along with a few Polish companies, including Alior and Software Mind. This distribution reflects Krakow's role as a delivery and R&D center for global enterprises with strengths in enterprise software, banking tech, embedded systems, and telecom infrastructure.

### The role of large IT hubs in shaping Krakow's tech talent ecosystem

Large technology hubs in Krakow continue to serve as anchor institutions within the local ecosystem. Their scale supports the development of advanced capabilities in areas such as cloud computing, data engineering, AI, embedded systems, and cybersecurity. At the same time, these organizations shape the wider market by influencing hiring practices, setting salary benchmarks, and generating demand for specialized expertise.

Over time, they also drive knowledge transfer, as experienced professionals transition into smaller firms or establish their own startups.

## Cisco

Largest IT employer hiring 2150 IT specialists

## 10

Companies with IT headcount over 1000 people

## 18<sub>K</sub>

IT specialists employed by the top 10 largest IT employers

Sources: Dataset by MOTIFE Insights

## Map of Krakow's 30 largest IT employers



COMARCH

# Łukasz Bolikowski

Chief AI Officer at Comarch



We stand on the threshold of the greatest revolution in the history of software engineering. Code is now produced at scale with the help of AI, and the traditional role of the programmer, the craftsman writing code line by line, is becoming obsolete. In a world dominated by autonomous agents, the key competencies are rigorous specification, uncompromising verification, and the ability to orchestrate a digital army. This is not the end of the developer profession; it is its radical new beginning.

### The end of the writing era, the beginning of the management era

Until recently, programming was associated with thousands of keystrokes. Today, that proportion is being turned upside down. Modern AI agents can easily handle entire code repositories, and their productivity is growing exponentially. The statistics are striking: in public repositories on GitHub, about 4% of code already comes from AI agents, and it is estimated that by the end of the year, this figure will rise to 20%. Traditional manual “keyboard coding” is becoming the domain of an ever-narrower and most critical part of systems.

Does this mean the programming profession will disappear? Absolutely not. What we are witnessing is a classic example of the Jevons paradox: increased efficiency in using a resource (code) paradoxically leads to higher demand for that resource. As code becomes “cheap,” we will produce ten times more of it. This, however, forces a complete shift in the required skill set. Humans move into the role of specification architects, test authors, and process managers.

### The art of specification and logical rigor

In this new paradigm, we must operate at a higher level of abstraction. Long ago we stopped programming in machine code, and now we are also stopping “thinking in syntax.” We work in the language of requirements specification. The greatest challenge becomes precision of thought. AI can execute almost any task, but it is the human who must know what they want and describe it flawlessly.

Project “under-specification,” which used to surface during a two-week sprint, becomes a critical error in the AI world. We must adopt the rigor of engineering practices used in critical systems—there is no room for assumptions. We see this clearly at Comarch: a recent AI Hackathon we organized demonstrated that those who succeed are the ones who define the problem with the greatest precision and effectively navigate the work of AI agents.

## Verification as the new heart of engineering

If machines produce code at scale, the key question becomes: who verifies it? Humans have limited attention spans and a natural tendency to lose focus. As a result, the center of gravity in software engineering is shifting dramatically toward verification. The role of testers will rise to that of a crucial guardian of system integrity. The traditional benchmark of 70% test coverage is no longer enough, we must aim for 100%.

That is precisely why we launched the AI Academy. Our goal is to fully adapt the organization to an AI-native model. We are not focusing only on developers, we want to give every employee, regardless of department, the opportunity to learn and understand this new reality. We believe that in the AI era, everyone must become an auditor of quality and a safeguard within the processes they participate in.

## The 24-hour sprint and “one-person unicorns”

Traditional frameworks of work in IT are beginning to crack. Although today we still operate within a human rhythm, the market is inevitably moving toward a model where what used to take two weeks will happen within a single day. In the near future, it will become standard for AI agents to work overnight for 12 hours, performing the tedious implementation work and delivering ready-to-review results by morning.

Humans will start the day by verifying whether the code produced by the agents aligns with the specification, and then move on to preparing precise specifications for the next task. This workflow requires a completely new arrangement of roles, tools, and meetings. There are no ready-made “playbooks” for such teams yet, we are creating them now, in real time. It is a fascinating but demanding shift, as the developer of the future becomes a manager of machines, which also brings psychological challenges due to fewer human interactions in the creative process.

Behind the scenes, there is also increasing discussion about the emergence of the first one-person unicorn startup, a company valued at one billion dollars run by a single founder. With AI, one creator can orchestrate an army of agents and accomplish tasks that once required fifty employees.

## Conclusion: an explosion of possibilities

The market will change radically, and at a pace we have never seen before. Yet there is no reason to fear for the future of the industry; rather, we are likely to witness an extraordinary explosion of possibilities. The key to success will be abandoning old habits and accepting that our greatest value is no longer knowledge of syntax, but the ability to rigorously define the world that artificial intelligence will build for us.



# Przemysław Broniek

Software Engineering Manager,  
Site Lead of Android & Business  
Communication at Google Krakow



RCS for Business bridges discovery and action by turning Google search surfaces into entry points for direct, two-way conversations. Our Poland engineering hub supports this vision across all steps of the journey.

Google Krakow has emerged as a critical location for Engineering and Research & Development. Google Krakow has earned a reputation as a high-stakes R&D hub - where "deep engineering" happens. Here, teams are not just maintaining products; they are architecting the future of Google Cloud, pioneering the next generation of Global Networking, and reimagining mobile communication through Rich Communication Services (RCS).

The Google RCS for Business Poland engineering team is critical to scaling RCS for Business globally. As business messaging shifts from one-way outreach to two-way, intent-driven conversations, building a trusted environment is our top priority. We implement Google's advanced spam and fraud detection, providing an extra layer of protection so consumers can be confident that every interaction is authentic. By integrating

carrier-regulated compliance and Verified Sender Profiles, we ensure businesses can connect safely and securely.

This foundation of trust unlocks a powerful channel for user-initiated, two-way communication. We build the infrastructure that allows customers to seamlessly go from searching for what they want to directly messaging a brand. By turning Google Search, Maps, and ads into conversational entry points, businesses can use RCS for Business as a highly effective lead generation tool. Instead of navigating clunky forms, users can instantly initiate conversations about their specific needs, allowing brands to capture and convert customer intent exactly when they are ready to act.

The true power of this platform emerges when we combine these conversations with artificial intelligence. Advances in AI and automation enable real-time, personalized engagement at scale. AI agents can provide immediate answers at moments of need, qualifying leads instantly and solving customer inquiries without the bottleneck of call queues. We are proud to engineer the robust, intelligent, and secure platform that makes these frictionless experiences possible.

## List of the largest IT employers in Krakow (1-10)

Company	IT headcount in Krakow ▼	Total headcount in Krakow	Country of origin	Krakow office setup year
<b>Cisco</b>	2150	6500	United States	2012
<b>HSBC</b>	1700	5000	United Kingdom	2010
<b>Comarch</b>	1700	2500	Poland	1993
<b>Motorola Solutions</b>	1700	2870	United States	1998
<b>HCL Technologies*</b>	1550	1850	India	2007
<b>EPAM</b>	1500	1700	United States	2011
<b>Sabre</b>	1300	1600	United States	2000
<b>Capgemini*</b>	1300	5000	France	2003
<b>Aptiv*</b>	1200	2470	United States	2011
<b>IBM</b>	1000	3000	United States	2005

Sources: based on data provided by companies mentioned.

\* Estimation based on online sources.

## List of the largest IT employers in Krakow (10-20)

Company	IT headcount in Krakow ▼	Total headcount in Krakow	Country of origin	Krakow office setup year
<b>UBS</b>	990	3800	Switzerland	2008
<b>Sii</b>	950	990	France	2011
<b>Ericsson*</b>	890	1150	Sweden	2003
<b>Luxoft*</b>	770	1000	Switzerland	2010
<b>Hitachi Energy*</b>	770	1200	Switzerland	2019
<b>Nokia Networks*</b>	620	850	Finland	2010
<b>Heineken*</b>	620	2000	Netherlands	2012
<b>ABB</b>	600	1850	Switzerland	1997
<b>Akamai</b>	570	830	United States	2011
<b>Accenture*</b>	520	1350	Ireland	2013

Sources: based on data provided by companies mentioned.  
\* Estimation based on online sources.

## List of the largest IT employers in Krakow (21-30)

Company	IT headcount in Krakow ▾	Total headcount in Krakow	Country of origin	Krakow office setup year
<b>Assa Abloy</b>	480	490	Sweden	2013
<b>Alior*</b>	470	1300	Poland	2008
<b>LTM*</b>	450	500	India	2020
<b>Pegasystems</b>	450	500	United States	2005
<b>StoneX</b>	450	500	United States	2018
<b>Brown Brothers Harriman</b>	420	2000	United States	2012
<b>Avenga</b>	440	450	Poland	2019
<b>Google</b>	400	400	United States	2007
<b>Software Mansion</b>	400	430	Poland	2012
<b>Qualtrics</b>	390	450	United States	2017

Sources: based on data provided by companies mentioned.  
 \* Estimation based on online sources.

This section highlights the largest domestic IT employers in the city, offers expert perspectives from leaders at top Polish firms, and provides an overview of Krakow-based software houses.

# Polish companies

## Overview of the landscape

Polish companies account for approximately 16% of Krakow's IT talent pool, making them the second-largest group after American companies.

41% of the IT specialists hired by the Polish companies work in the IT Services and IT Consulting industry, followed by the Software (37%) and Finance (8%) industries.

## Structure of Polish IT companies in Krakow

Polish companies in Krakow form a diverse part of the local IT landscape. Comarch remains the leading domestic employer, with around 1 700 IT specialists, and stands out as Krakow's own software company with an international footprint. The group also includes large B2C and sector-driven organizations such as InPost (400), Allegro (120), and Alior Bank (470), where technology supports logistics, e-commerce, and financial services at scale.

Beyond these larger players, the market is shaped by numerous smaller Polish firms employing fewer than 100 IT specialists, mostly across IT services, software development, and niche business applications, including companies such as Saldeo. This structure is complemented by Krakow's startup community, which adds a product and innovation layer to the domestic ecosystem.

# Comarch

Largest Polish IT employer in Krakow

# 16%

Share of IT talent pool that works in Polish companies

# 40%

Share of IT talent pool working in Polish companies works in IT Consulting, IT Services industry

Source: MOTIFE Insights 2026

**Diagnostyka+**

# Robert Tomaka

CIO at Diagnostyka



Digital transformation is inherently embedded in Diagnostyka's DNA, as the largest network of medical laboratories in Poland. Given the scale of our operations, technology has naturally become one of the Group's key strategic growth drivers.

Our Krakow-based IT teams develop proprietary laboratory platforms that connect sample collection points, laboratories, doctors, and patients into a single, seamless flow of information. These include the x-Lab laboratory system, a mobile application for patients, and an integration layer linking us with thousands of healthcare facilities across the country.

We consistently invest in artificial intelligence and machine learning, as well as in telemedicine, data platforms, cloud solutions, and cybersecurity—areas that are critical for a modern healthcare provider. Our plans for the coming years remain equally ambitious.

Choosing Krakow as the location for the development of our IT function was a natural decision. The city offers an exceptionally deep talent pool, shaped by leading academic institutions such as the Jagiellonian University, AGH University of Science and Technology, and the Cracow University of Economics. These universities educate not only software engineers, but also data scientists, biostatisticians, and bioinformaticians—profiles essential for a technology-driven healthcare organization.

Equally important is Krakow's mature IT ecosystem. The presence of global technology employers, a strong start-up environment, and active professional communities facilitates talent acquisition, knowledge exchange, and collaboration on innovative projects.

For a Polish company building digital healthcare products with strong growth ambitions, Krakow offers the right combination of talent, infrastructure, and momentum.

# Polish software houses

Polish software houses play a central role in Krakow's IT ecosystem, employing a significant share of the local workforce and demonstrating Poland's engineering capabilities on the global stage. Known for delivering high-quality software development services, they support clients across industries including fintech, healthcare, retail, and media.

Companies based in Krakow frequently collaborate with international start-ups, offering end-to-end development teams or staff augmentation. This model enables clients to scale operations efficiently and accelerate product delivery while maintaining high engineering standards.

While historically focused on general software development, many of these firms have expanded into more specialized areas in recent

years. Strong competencies have emerged in fields such as fintech, cybersecurity, data analytics, and cloud solutions, reflecting increasing global demand and the growing complexity of digital products.

This shift toward specialization, combined with operational flexibility and deep technical expertise, positions Krakow's software houses as long-term partners for both start-ups and large enterprises.

# 4<sub>k</sub>

IT specialists working in Polish software houses in Krakow

## Polish software houses with the largest teams in Krakow

Company	IT HC Rounded	Year founded	Technologies / Domains
<b>Avenga</b>	440*	2019	Java, Scala, Python, React, Embedded, Android, DevOps, Azure for digital transformation projects
<b>Software Mansion</b>	400	2012	JavaScript, Java and Agile Methodologies for Pharma, Insurance, Finance and Banking, Automotive industries
<b>Ailleron</b>	330*	2011	Java, JavaScript, C#, ML, AI, Mobile, Digital process automation for Fintech industry
<b>VirtusLab</b>	300*	2010	Java, JavaScript, C++, C#, Python, Scala, Google Cloud, and Data for custom software development
<b>Software Mind</b>	270*	1999	Java, Python, JavaScript, Node, AWS, C++ for tailor-made software solutions
<b>j-labs Software Specialists</b>	270	2010	Java, Python, JavaScript, Node, AWS, C++ for custom software development projects
<b>Miquido</b>	190*	2011	JavaScript, Java, React.js, Android, iOS, AI for Entertainment, Fintech, eCommerce and other industries
<b>Codibly</b>	100*	2011	Java, JavaScript, Spring, Hibernate, PHP, and Docker for eMobility, Renewable energy, Environment Sustainability industries

Source: MOTIFE Insights 2026, companies career sites, LinkedIn data.

# SoDA

## Piotr Żurawlow

CEO at Softiq, Board Member at SoDA



The Polish software house sector is entering a new phase of development. After years of rapid growth driven by global demand for IT outsourcing, the market is maturing and becoming increasingly competitive. As a result, the country's technology landscape is undergoing a clear transformation.

The long-standing dominance of traditional tech hubs—such as Warsaw, Krakow, and Wrocław—is beginning to shift. Emerging cities once seen as secondary hubs, including Gliwice, Rzeszów, Białystok, and Kielce, are gaining traction. The rise of remote work, increasing operational costs in major cities, and a strong academic base in smaller urban centers mean that innovation is no longer confined to a handful of large metropolitan areas.

At the same time, artificial intelligence is accelerating the democratization of technology. AI-powered tools are giving small teams capabilities that, just a decade ago, were reserved for organizations with multi-million-dollar budgets. As a result, success in the global market is increasingly driven by specialization and agility rather than sheer headcount.

These trends are further reinforced by ongoing market consolidation.

M&A activity in the Polish IT sector is intensifying, with foreign capital increasingly targeting local companies. Importantly, acquisition targets are no longer limited to boutique software houses, they now include major players and integrators such as Asseco and Comarch.

As a result, the number of large, independent technology firms with Polish roots is declining, as the sector becomes more deeply integrated into the global ecosystem.

# European companies

European companies employ 34% of Krakow's IT professionals. Of this group, 18% works for EU-based companies, while 16% are employed by non-EU European companies. Leading countries investing in Krakow's tech talent include United Kingdom, France and Switzerland.

The significant presence of European companies among Krakow's top IT employers, with 10 out of the 30 largest being European firms such as HSBC, Capgemini, UBS or Sii, and European companies constituting 5 out of 12 new IT players in Krakow over the past year, highlights Krakow's emergence as a strategic hub for European IT operations extending far beyond simple cost reduction. Krakow's appeal extends beyond established corporations seeking to expand their operations.

The city has cemented its reputation as an innovation hub, notably demonstrated by being home to R&D centers for European startups that have achieved Unicorn status.

## Why Krakow is a strategic choice for European IT and R&D hubs

Krakow offers a business environment shaped by the benefits of EU membership, combining regulatory consistency with practical advantages for international companies.

# 34%

Share of the Krakow's talent pool employed by European companies excluding Poland

# 10 of 30

Largest IT employers in Krakow are European companies

**Harmonized regulations and standards.** As an EU member, Poland operates within a legal and regulatory framework consistent with other member states. This alignment simplifies compliance and reduces administrative complexity. Shared EU directives ensure uniform treatment of key areas such as intellectual property and data protection (e.g., GDPR), while the common legal heritage supports consistency in corporate and employment law across jurisdictions.

**Simplified financial operations.** Companies can apply the VAT reverse charge mechanism in their home country, easing cash flow management. Additionally, the stable exchange rate between the Polish zloty (PLN) and the euro (EUR) minimizes currency risk.

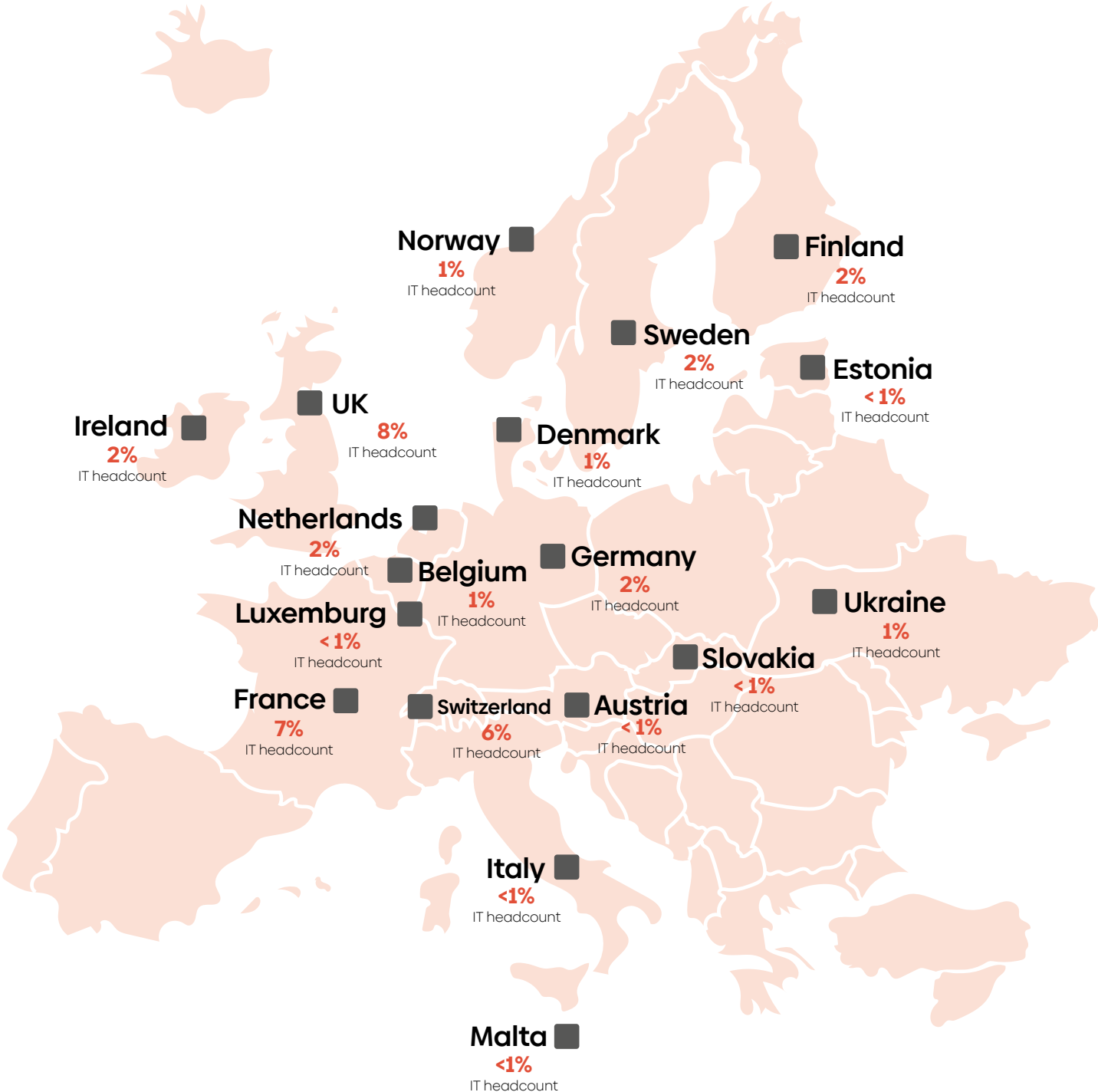
**Efficient travel connections.** Krakow is easily accessible, with direct flights to over 120 European airports. Most destinations are within a 1-4 hour flight, facilitating frequent and convenient travel.

**Robust talent pool.** Unlike many smaller European markets with limited local IT talent, Krakow offers access to a broad and skilled workforce, making it a strong alternative for sourcing technology professionals.

**Intra-EU mobility.** EU freedom of movement enables seamless employee relocation across borders, supporting flexible staffing and expansion across European locations. Krakow benefits from this mobility, making it a practical hub for international operations.

**Multilingual talent.** Krakow's workforce includes a significant number of multilingual professionals, with fluency in all major European languages. This is further strengthened by an active expat community, offering native-level language skills combined with technical expertise.

**Share of Krakow IT talent pool by the country of origin of employer, European employers only**



Source: Database by MOTIFE Insights, 2026.



# Yan Kalbaska

Director of Engineering  
at HERE Technologies



HERE Technologies is the global leader in mapping and location technology. For more than 40 years, the company has been powering innovation by bringing people, ideas and technology together: from launching our first digital map in 1985, to shaping the future of software-defined vehicles today.

HERE has a long-term presence in Krakow, attracting local and neighboring talent. The local team currently consists of 240 professionals, working mostly in software engineering. The city has a lot to offer for employees located in Poland and those willing to relocate. This includes substantial flexibility, a convenient time zone, travel opportunities, and a rich local cultural landscape.

Being part of the Polish technology scene for many years, HERE benefits from both the business stability of the country as well as the dynamic nature of its economy which is showing strong growth and attracting investments.

Together they create an ideal environment for the company to further grow its local footprint, scale its operations and drive more innovation.

HERE is heavily invested in the recent AI paradigm shift with most of our talent adopting and experimenting with multiple AI tools in their daily activities helping with faster tech stack onboarding, discovery and codebase analysis. HERE provides exciting opportunities and meaningful challenges that empower talent and sustain the company's leadership in a highly competitive industry.



# American companies

The United States has reinforced its position as a strategic pillar of the Polish economy, remaining the second-largest foreign investor with a 12% share, behind Germany and ahead of France. The cumulative value of American investments reached approximately \$26.8 billion, with total assets significantly exceeding this level.

In Krakow, U.S. companies continue to play a defining role in shaping the IT sector. They employ over 42% of the city's IT specialists and account for 12 of the top 30 IT employers, underscoring the strategic importance of American capital in the development of Poland's technology landscape.

# 42%

Of the IT talent pool works in US companies

# 1998

The first US company, Motorola, opens an IT hub in Krakow

## 10 largest American IT hubs in Krakow

Company	IT headcount in Krakow	Industry
Cisco	2150	Telecommunications, Networking
Motorola Solutions	1700	Telecommunications, Networking
EPAM	1500	IT Consulting, IT Services
Sabre	1300	Travel, Aviation
Aptiv*	1200	Automotive
IBM	1000	Software
Akamai	570	Telecommunications, Networking
StoneX	450	Finance
Pegasystems	450	Software
Brown Brothers Harriman	420	Finance

Source: MOTIFE Insights 2026



# Mateusz Jurczyk

Branch Director Krakow & Katowice  
at Amcham



**The technology job market globally is on everyone's lips now. Media headlines warn of mass layoffs. How does it propagate to Poland and Krakow, are these locations impacted by global trends?**

Available data suggests otherwise. Even with some layoffs at IT employers, overall pool of talent employed in the technology functions grows. What about new job offers? In 2025, there were fewer than the previous year, yet in percentage terms Krakow still outperforms the national average.

Daily conversations with large American companies point to one clear conclusion: genuine optimism about Krakow as a top location. Companies that established themselves here some time ago - such as Cisco, IBM, Google, and Zendesk - continue to grow their teams. It's not just about numbers - the shift toward more advanced and knowledge-intensive processes is impossible to overlook. At the same time, we see a constant inflow of U.S. investors, visible both in sectors traditionally associated with Krakow and in less obvious ones. All of these companies form the foundation of Krakow's future growth.

Can we, then, sit back with a smile on a bench in Planty Park, enjoying a traditional obwarzanek, and simply watch how events unfold? Absolutely not.

This is a time to seek solutions and implement them. A time to invest in education and in building a stronger, more resilient local ecosystem that will support companies at every level - regardless of their size, technological sophistication, or degree of internationalization. An ecosystem that provides businesses with talent equipped with the right skills, while at the same time giving young people real prospects and the conviction that the question is no longer "Why Krakow?" but confidently, "Yes - Krakow."

Let's remember that for many future specialists, their journey begins with a single career guidance lesson in elementary or high school. But are these lessons truly preparing them for the future? Do they teach the skills that tomorrow demands - or those of yesterday? It's time to take a closer look and take action. Now.



# Sebastian Adamczyk

Director of Engineering & Poland Site  
Lead at Dover Fueling Solutions



At Dover Fueling Solutions® (DFS), I lead the development team responsible for DFS Anthem UX®, one of our flagship products, while also overseeing engineering operations in Poland. This dual role allows me to view Krakow not only as a software engineering hub, but also as an important contributor to the broader goals of a global technology organization.

Our presence in Krakow in its current form dates back to 2018. The initial decision to build a team here was driven by access to highly skilled engineering talent that could support our digital transformation initiatives. Krakow offered a strong technology ecosystem and a deep pool of software engineers, particularly in modern areas such as cloud platforms, including Azure. In practice, we discovered a community of engineers who not only possess strong technical expertise but also demonstrate a high level of adaptability and a willingness to quickly learn and apply new technologies.

In a global product organization, the ability to respond to continuous technological change is critical. The Krakow engineering community has proven exceptionally well suited to this environment. Engineers here are comfortable

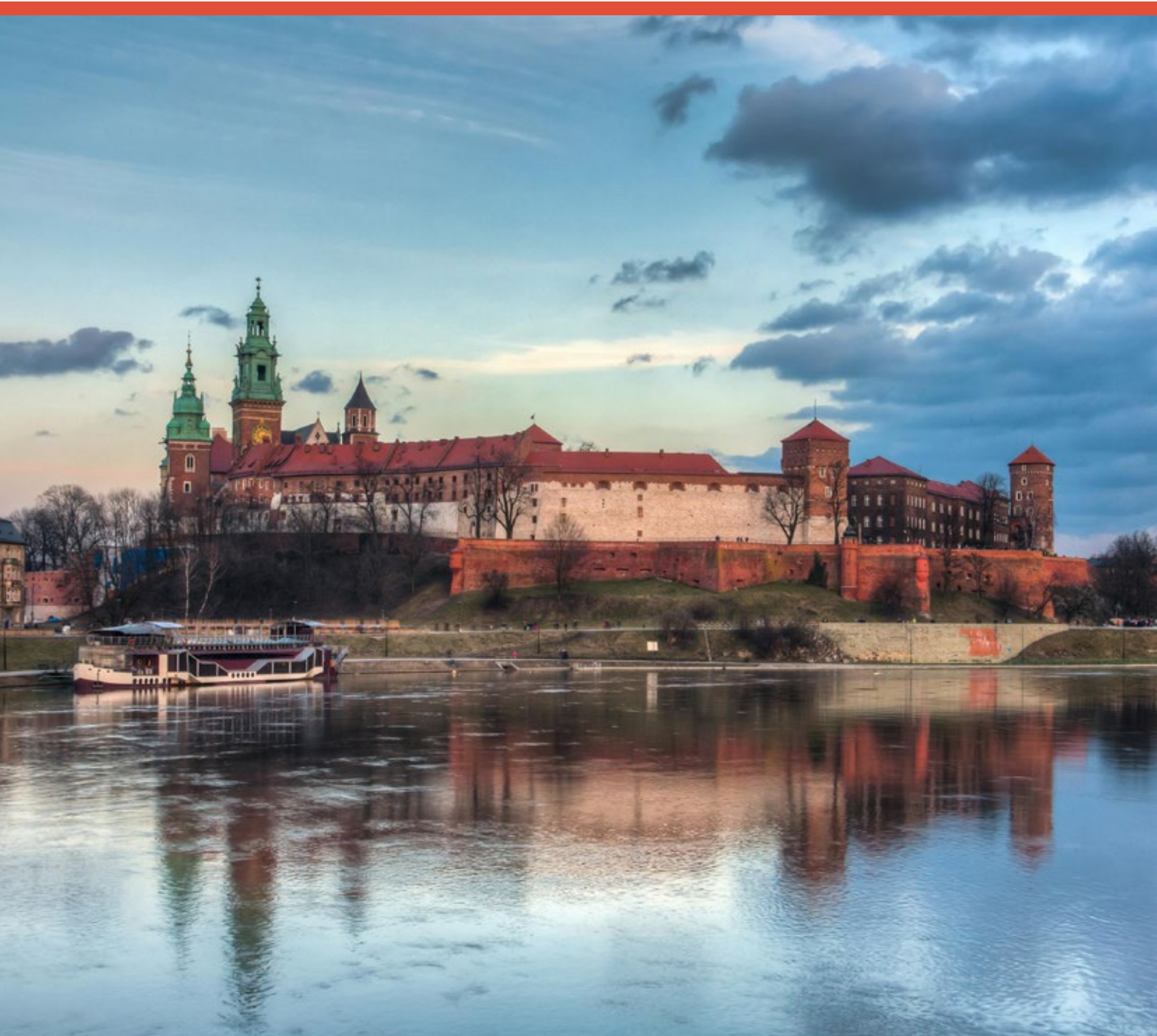
operating in fast-paced development cycles and adapting to evolving architectures, tools, and market expectations. In several areas, the quality and capability of the talent pool have exceeded the expectations global teams initially had when evaluating Krakow as an engineering location.

Today, our teams in Krakow contribute to the development of multiple products across the Dover Fueling Solutions portfolio. This includes software supporting fueling systems as well as solutions related to emerging technologies such as EV charging (EVC). These projects require engineers to work across different domains—from cloud software and data platforms to communication protocols that connect physical devices and sensors. The result is an environment where engineering teams contribute directly to complex, globally deployed products that support critical energy and mobility infrastructure.

One cultural characteristic that often surprises colleagues from other regions is how engineers in Poland approach problem-solving. There is a strong tendency to ask questions and challenge assumptions. Engineers here typically want to understand not only how a system works, but also why it was designed in a certain way and what value it delivers to the business. In practice, this curiosity leads to stronger engagement with the product and a deeper sense of responsibility for outcomes.

From my perspective, this mindset reflects a broader strength of the Krakow engineering community. Many engineers combine technical expertise with a strong awareness of business context and operational efficiency. Their contribution therefore extends beyond writing code—they actively look for ways to improve processes, optimize solutions, and create greater value for the organization and its customers.

For international companies considering building engineering teams in Krakow, the key is to view the location as a center for ownership and innovation rather than purely execution. Engineers here are highly motivated by autonomy and the opportunity to work on complex technical challenges. When organizations empower them with that responsibility, the results can be exceptional.



# New foreign IT players

## Sustained momentum

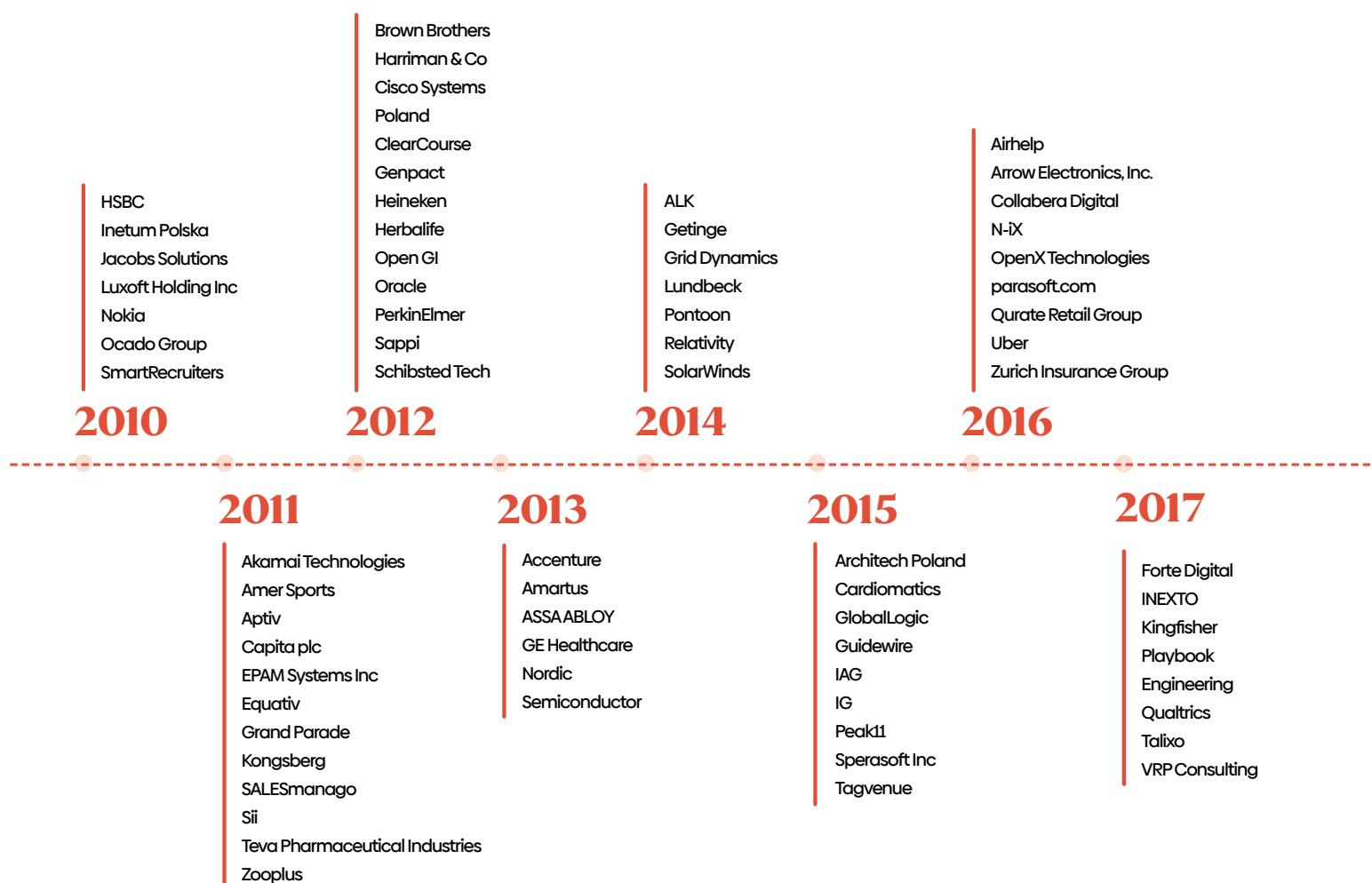
Over the past five years, Krakow has welcomed more than 60 new international IT players. The pace of market entry has stabilized, but it has not slowed.

While the record-breaking surge observed in 2021 and 2022 has normalized, the city continues to attract approximately 10-20 new international companies annually. This consistency signals structural strength rather than short-term momentum.

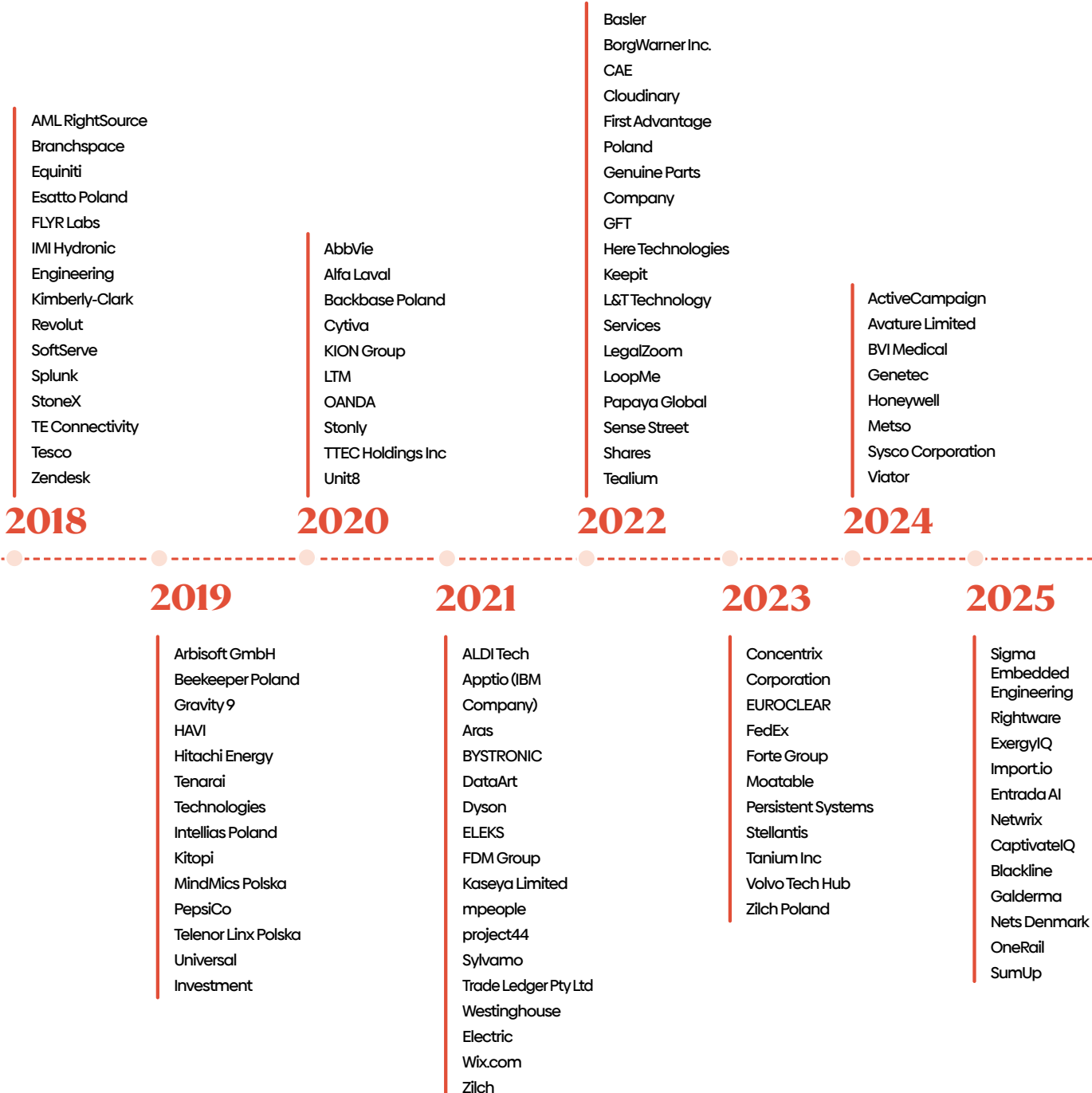
# 60+

60+ new IT players  
in the last 5 years

### Timeline of new foreign IT hubs in Krakow (2010-2025).



Source: MOTIFE Insights 2026



# Michał Porzożyński

VP Software Engineering at Blackline



BlackLine built its engineering hub in Krakow with full product teams in mind, not a support center or outsourcing operation. Engineers working in Krakow are part of the company's global organization: they own specific product areas, contribute to architectural decisions, and build solutions used by companies like Google, Apple, and Adobe.

The choice of Krakow was deliberate. The city has strong academic traditions, a thriving technology ecosystem, and a deep pool of experienced engineers. The people we talk to are looking for more than just a good salary. They want to solve hard problems and have a real impact on what they build.

The Krakow hub today brings together four teams: Studio 360, UI Platform, Invoice-to-Cash, and SAP Engineering. We build software that automates financial processes for some of

the largest organizations in the world, develop infrastructure handling billions of transactions, and deliver AI-powered solutions in the accounts receivable space. This is complex engineering in a domain where precision and reliability have direct consequences for our customers' financial outcomes.

By the end of 2026, we expect to reach several dozen engineers in Krakow. Over the next three to four years, the hub is expected to grow to 150 engineers and become one of the core pillars of BlackLine's global engineering organization. We are looking for experienced engineers with backgrounds in backend systems, platforms, and infrastructure, engineers who have built and deployed AI-based solutions at scale, and strong frontend developers. Our software development lifecycle is AI-native, so we expect the people who join us to be comfortable working in that way - it is an industry transformation that is happening right before our eyes.

# List of new international IT players



**BlackLine**  
Software / USA  
[blackline.com](https://blackline.com)

BlackLine develops cloud-based software that automates and manages financial close, accounts receivable, and intercompany accounting processes.

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## CaptivateIQ

**CaptivateIQ**  
Software / USA  
[captivateiq.com](https://captivateiq.com)

CaptivateIQ is a sales commission management platform that automates the administration, calculation, and reporting of complex variable compensation plans, helping revenue teams align incentives with business goals.



**IT Services**  
IT Consulting / USA  
[entrada.ai](https://entrada.ai)

Entrada is a Databricks-focused consulting and implementation partner backed by Databricks Ventures. It helps companies accelerate AI and data initiatives through data engineering, governance, and advanced analytics solutions.

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## EXERGYIQ

**ExergyIQ**  
IT Services, IT Consulting / USA  
[exergyiq.com](https://exergyiq.com)

ExergyIQ is a senior-only software engineering partner focused on delivering reliable, scalable, and high-performing digital products across backend, frontend, mobile, cloud, and AI technologies.



**Galderma**  
Pharmaceutical  
manufacturing / Switzerland  
[galderma.com](https://galderma.com)

Galderma is the world's largest independent dermatology company, offering products across injectable aesthetics, dermatological skincare, and therapeutic dermatology.



**Import.io**  
Software / USA  
[import.io](https://import.io)

Import.io provides an AI-powered web data extraction platform that helps enterprises convert unstructured web content into structured, analysis-ready data without coding, serving e-commerce, market research, and business intelligence use cases.

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## nets

**Nets Denmark**  
Financial services / Denmark  
[payments.nets.eu](https://payments.nets.eu)

Nets provides digital payment solutions for merchants, including in-store and online payments, card acquiring, and related transaction services across the Nordic market.

# MOTIFE

**Set up your IT hub  
in Poland with  
one partner.**



**One partner** across entity  
setup, recruitment, and  
back-office operations.

**[motife.com/setup](https://motife.com/setup)**

# List of new international IT players

## netwrix

Netwrix  
Software / USA  
[netwrix.com](https://netwrix.com)

Netwrix is a cybersecurity company specializing in identity and data security solutions. It helps organizations identify and protect sensitive data, detect threats, ensure compliance, and recover from attacks across hybrid cloud environments.

## OR OneRail

OneRail  
Logistics / USA  
[onerail.com](https://onerail.com)

OneRail provides an AI-native last mile delivery orchestration platform that helps retailers and logistics operators manage courier capacity, automate routing decisions, and handle delivery exceptions in real time.

## R RIGHTWARE

Rightware  
Software / Finland  
[rightware.com](https://rightware.com)

Rightware develops automotive graphics software tools and services, including the Kanzi UI framework. It enables automakers to design and deploy stunning digital user interfaces for vehicle cockpits, clusters, and HUDs.

## SIGMA Software

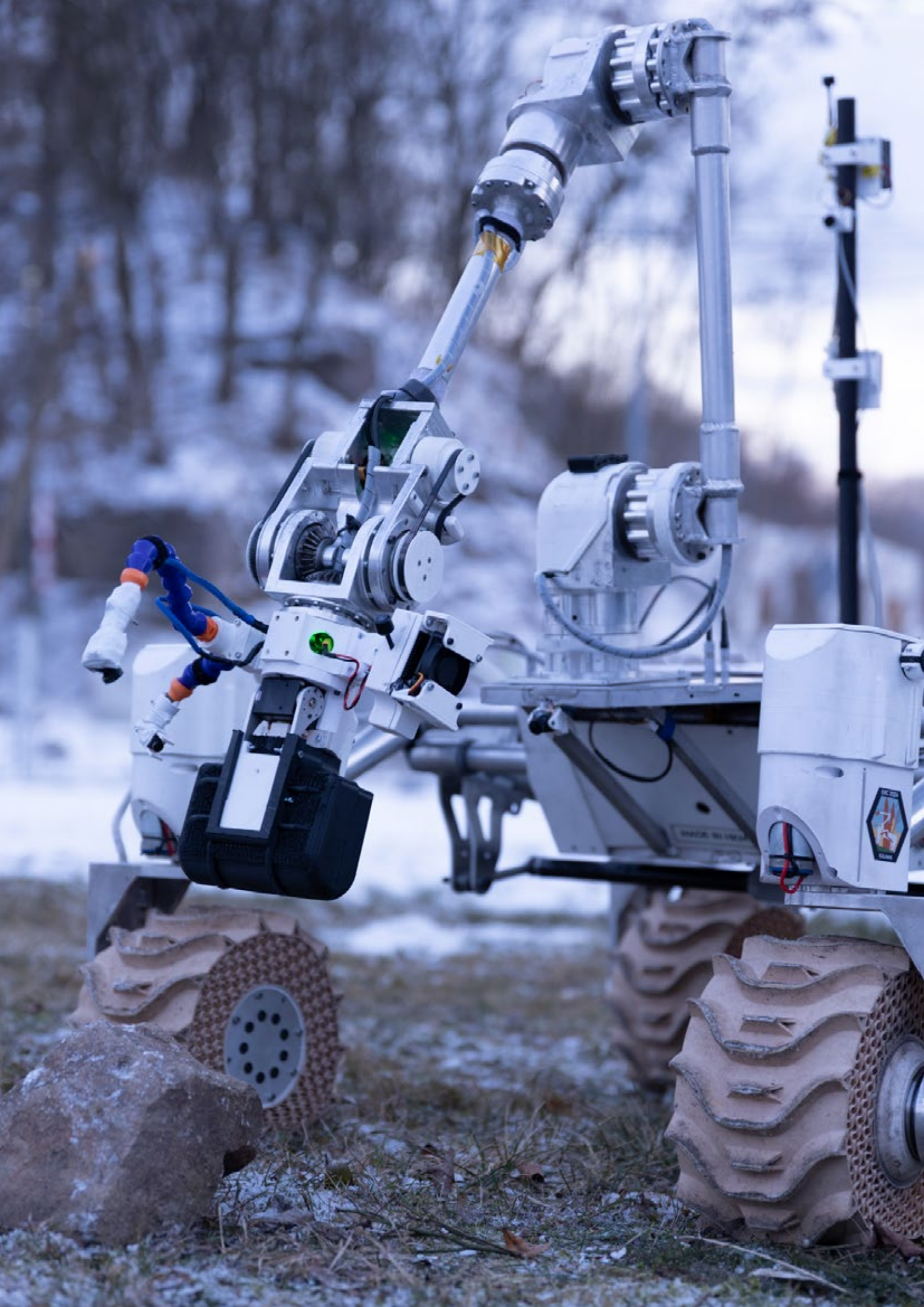
Sigma Embedded Engineering  
IT Services, IT Consulting /  
Sweden  
[sigmaembeddedengineering.se](https://sigmaembeddedengineering.se)

Sigma Embedded Engineering specializes in R&D, embedded systems, and software development. It delivers solutions for electrification, AI, digitalization, and connectivity across automotive and industrial sectors.

## sum up®

Financial services / United  
Kingdom  
[sumup.com](https://sumup.com)

SumUp is a global fintech company offering card payment processing, point-of-sale tools, business accounts, and related financial services for small businesses and merchants.



# Spotlight section

## Dual Use and Space

Krakow is strengthening its position as a center for dual-use and space technologies, building on its established IT, engineering, and research base. Growing demand for security, resilience, and technological sovereignty is accelerating this shift. Supported by institutions such as AGH University of Science and Technology and a growing deep-tech sector, Krakow is evolving beyond a traditional IT hub toward technologies with both commercial and defense applications.

### A new dual-use ecosystem

A key milestone was the launch of FORT Krakow in 2026, operated by AGH and Krakow Technology Park as Poland's only NATO DIANA accelerator site. It supports startups such as AegisX, Picogrid, and Wave Sciences in areas including autonomous systems, cybersecurity, and sensing. The ecosystem is reinforced by national programs such as DUET and IDA, as well as regional funding focused on security and infrastructure resilience. The Polish Dual-Use Chamber supports standardization and cooperation between industry and public institutions.

### From research to applied technologies

Krakow's dual-use capabilities are driven by strong academic and industrial collaboration. AGH contributes through its Space Technology Centre and computing infrastructure, while Cracow University of Technology focuses on materials and infrastructure safety. Jagiellonian University adds expertise in biosecurity. On the company side, DefendEye develops autonomous drones, SATIM provides AI-based satellite imagery analysis, and Widmo Spectral Technologies delivers ground-penetrating radar used in both civil and defense applications. These examples highlight the adaptability of local technologies to security use cases.

### Space as a strategic specialization

Space technologies are an emerging specialization. The Krakow Space City initiative, supported by the city and Krakow Technology Park, aims to develop capabilities in satellite systems and data processing. Creotech Instruments, active in ESA projects, has expanded to Krakow, alongside companies such as Eycore (SAR payloads) and Orbify (geospatial intelligence). The ecosystem is supported by academic projects like KRAKsat and HYPE at AGH and events such as the European Rover Challenge, positioning Krakow as a growing space and dual-use technology hub.

## FORT Krakow

Poland's only NATO DIANA  
accelerator site

## PLN 1 billion (~€230M)

from the regional operational  
program for Malopolska  
(2021-2027), reallocated to  
security, dual-use technologies,  
and resilience infrastructure



# Bartosz Józefowski

Management Board Plenipotentiary  
for Dual use Technologies



## Dual use as a strategic shift

In recent years, defense spending and dual use technologies have moved to the center of strategic discussions across Europe. The scale of investment and the pace of technological adoption suggest a lasting structural shift rather than a temporary trend. For technology companies, this development expands the range of markets in which innovation can be applied.

## Civilian innovation shaping defense

While historically many breakthrough technologies originated in the military sector, today armed forces increasingly rely on solutions first developed for commercial use. Artificial intelligence, autonomy, data analytics, advanced imaging, and cybersecurity are now driven primarily by private-sector R&D. As a result, the civilian market has become a key source of innovation that can later be adapted to defense needs. This creates entry opportunities for technology firms that understand the operational and regulatory specifics of the sector.

## Agility versus scale

Defense procurement remains dominated by large international contractors experienced in managing complex public contracts. Their scale and procedural requirements can slow experimentation and deployment. This opens space for startups and SMEs able to develop and

test solutions faster, often in cooperation with major system integrators. In Poland, however, the limited number of strong integrators continues to constrain ecosystem growth.

## Security demand in a changing environment

Recent conflicts, including the war in Ukraine, illustrate how security challenges are expanding across cyber, information, and physical domains. Commercial technologies such as drones or AI-based systems are increasingly used in operational contexts, while the barrier to entry for disruptive activities has decreased. This reinforces the long-term importance of innovation in both military and public security institutions.

## Dual use as a business strategy

Dual use should be understood primarily as a strategic approach rather than a separate market. Companies combine scalable commercial products with selective participation in defense procurement, accepting longer sales cycles and higher regulatory requirements in exchange for access to large, long-term contracts. Importantly, defense demand extends beyond the armed forces to public security services and operators of critical infrastructure. For technology ecosystems such as Krakow, this shift represents both a strategic responsibility and a growing economic opportunity.

# Focus

## NATO DIANA

NATO DIANA (Defence Innovation Accelerator for the North Atlantic) is a key initiative aimed at maintaining the Alliance's technological edge in response to rapid advancements in Emerging and Disruptive Technologies (EDTs). Established following NATO's 2021-2022 strategic decisions, DIANA focuses on accelerating the development of dual use technologies, solutions originating in the civilian sector with applications in defense and security. Its core objective is to bridge the gap between commercial innovation cycles and military needs, particularly in areas such as AI, cybersecurity, quantum technologies, and autonomous systems.

Krakow plays a central role in this ecosystem through the FORT Krakow - DIANA Accelerator Poland, launched in January 2026. As the first DIANA accelerator on NATO's eastern flank, it reflects Poland's growing strategic importance and Krakow's position as a mature technology hub. The initiative leverages the city's strong academic base, R&D capabilities, and established business environment.

The accelerator is operated by AGH University of Krakow and the Krakow Technology Park (KPT). AGH provides research infrastructure and technical expertise, supporting deep tech development and validation. KPT is responsible for business acceleration, offering mentoring, commercialization support, and access to industry and defense networks. This structure combines scientific potential with market-driven scaling.

DIANA operates through annual challenge programs addressing key defense problems defined by NATO. Selected startups receive non-dilutive funding, mentoring, and access to a network of test centers for technology validation. In 2026, the program included 150 companies across NATO countries. The Rapid Adoption Service (RAS) ensures developed technologies can be tested and deployed with military end-users. Poland supports DIANA through a national network of test centers specializing in AI, cybersecurity, robotics, and advanced materials, enabling full-cycle development. Backed by the €1 billion NATO Innovation Fund, the initiative strengthens Poland's and Krakow's role in the European defense and innovation ecosystem.





# Jarosław Chojnacki

Head of the SpaceUp BSA  
at Krakow Technology Park



## The space sector: from media buzz to hard geopolitics and business

Space technologies are increasingly moving from symbolic narratives into the core of geopolitical and economic strategy. In Poland, rising public attention – often linked to the so-called “Stawosz effect” following the mission of a Polish astronaut – has strengthened awareness of the sector. However, its real importance stems from structural trends shaping global technology markets. The space economy is expanding rapidly, and Poland is becoming a more active participant in this transformation.

## Falling launch costs: the democratization of space

A key driver of change is the sharp decline in launch costs. Commercialization and the emergence of private operators have improved efficiency and introduced new business models, significantly lowering the barrier to entry. Technologies once accessible only to major national agencies are now becoming available to smaller countries and private companies, enabling them to build products and services based on orbital infrastructure.

## Poland: a small but increasingly integrated ecosystem

Although still relatively small, Poland’s space ecosystem is becoming more structured and internationally connected. Companies such

as Creotech Space Technologies, KP Labs, SatRev, PIAP Space, and Astronika are already participating in international missions, developing satellite platforms, onboard software, robotics systems, and specialized mechanisms. The value chain extends beyond hardware to include data processing and downstream applications across industries.

## Technology transfer: from orbit to the chip factory

Technology transfer remains one of the most tangible dimensions of the sector. Innovations developed for space missions often find commercial uses in unexpected areas – from household water filtration systems to control algorithms applied in food manufacturing processes. These examples illustrate how space technologies can deliver practical competitive advantages beyond the aerospace domain.

## Krakow as a natural competence hub

Krakow is gradually positioning itself as a competence center in this field. Initiatives such as ESA BIC Poland incubation programs, micro-grants supporting commercialization, and research projects in satellite engineering at AGH University of Science and Technology contribute to building local expertise. Together with companies operating within the Krakow Technology Park, these efforts strengthen the city’s ambitions to develop space technologies as a new area of specialization.

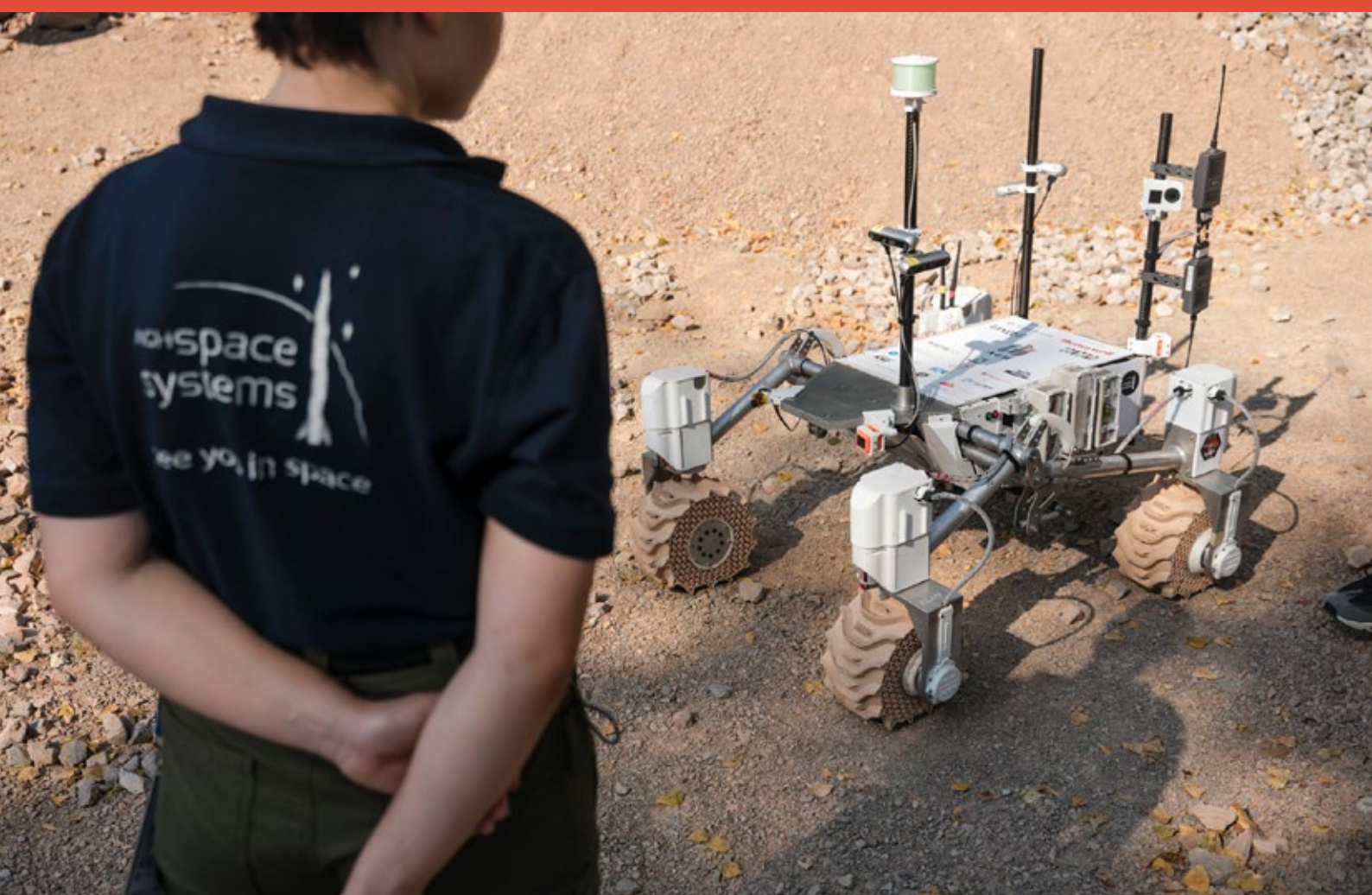


## Selected Dual-use and Space technology companies in Krakow

Company	Country of origin	Area	Key projects/activities
<b>6ROADS</b>	Poland	Space	Tracking and monitoring satellites and space debris via observatory networks
<b>Creotech Instruments</b>	Poland	Space	Satellite platforms (HyperSat), ESA missions (Plasma Observatory), space debris monitoring (SBOM), lunar mission Twardowski, 5G satellite communication
<b>DefendEye</b>	Poland	Defence	Autonomous AI-powered drones for ISR, rescue, and emergency missions
<b>Eycore</b>	Poland	Space	Development of SAR payloads and satellites for sovereign Earth observation
<b>Honeywell Aerospace</b>	USA	Defence	Engineering and R&D in aerospace and defense-related technologies
<b>ICEYE</b>	Finland	Space	SAR satellite constellation, Earth observation for defense and government clients
<b>IS-Wireless / Revobeam</b>	Poland	Dual-use	5G/6G and advanced antenna systems for resilient and secure communications
<b>Liftero</b>	Poland	Space	Propulsion systems for small satellites, validated in orbit
<b>Orbify</b>	Poland	Dual-use	Satellite data analytics for infrastructure monitoring, energy, and compliance
<b>SATIM (AGH spin-off)</b>	Poland	Dual-use	AI-based SAR satellite imagery analysis (OREC platform) used in ISR and intelligence workflows
<b>SmallGIS</b>	Poland	Dual-use	Remote sensing, GIS systems, and geospatial software development
<b>Spectator</b>	Poland	Dual-use	Satellite image processing and AI-driven geospatial analytics tools
<b>Widmo Spectral Technologies</b>	Poland	Dual-use	Ground-penetrating radar (SGPR) for subsurface scanning (civil engineering & military applications)










































## Ecosystem initiatives supporting Dual-use and Space technologies

Project / Initiative	Type	Key projects/activities
<b>FORT Krakow / NATO DIANA</b>	Defence accelerator	Acceleration of dual-use startups; coordination of 10 national test centers
<b>Krakow Space City</b>	Strategic initiative	Development of space and AI ecosystem; positioning Krakow as a space hub
<b>AGH Space Technology Centre</b>	Academic R&D	Research, education, and development of space technologies
<b>KRAKsat</b>	Academic satellite project	Nanosatellite testing ferrofluid behavior in space
<b>HYPE (PocketQube)</b>	Academic satellite project	One of the smallest Polish satellites, developed by AGH students
<b>European Rover Challenge</b>	International event / platform	Space robotics competition and industry networking platform



# Industries

The top 10 of Krakow's sector clusters reflect three decades of successive company arrivals, where established players helped attract further entrants from the same industries and reinforced the city's specialization patterns. The logos below represent selected organizations in each cluster.

IT Consulting, IT Services	    
Software	    
Telecommunications, Networking	    
Finance	     
Engineering, Manufacturing	    
Travel, Aviation	     
Automotive	    
Retail, Ecommerce	     
Consumer goods	    
Energy	   

Krakow's IT talent distribution reflects a high level of concentration, with three leading industries accounting for nearly 60% of the workforce. IT Consulting & Services (28%), Software (18%), and Telecommunications & Networking (13%) together represent 59% of the total talent pool. This confirms the city's strong positioning as a delivery and product development hub, while the telecommunications segment underlines Krakow's role in building and maintaining global digital infrastructure.

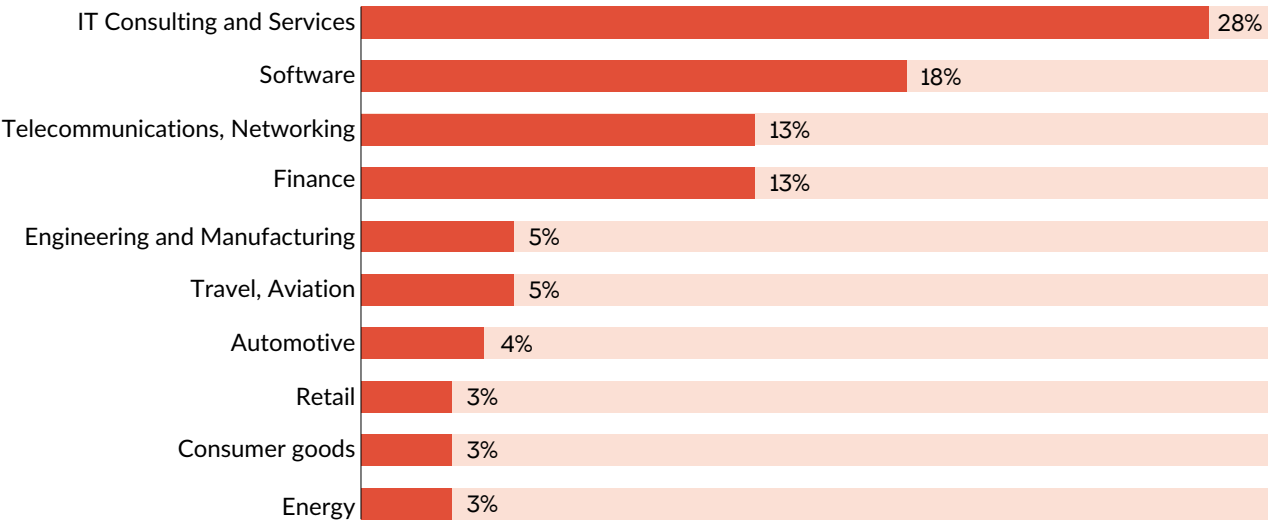
Beyond the top three, Finance (13%) remains a key pillar of the ecosystem, reflecting sustained investment from global financial institutions developing banking platforms, payment systems, and compliance technologies. Together, these four industries account for over 70% of the city's IT talent, indicating a mature and highly specialized market aligned with global demand for software, data, and infrastructure capabilities. This concentration pattern is consistent with the broader evolution of Krakow from a service delivery location to a center of advanced IT and R&D activities .

At the same time, a diversified layer of mid-sized sectors contributes to the ecosystem's resilience. Engineering & Manufacturing (5%) and Travel & Aviation (5%) highlight the presence of industrial and domain-driven IT applications, including embedded systems and large-scale operational platforms. Automotive (4%) further strengthens this profile, reflecting Krakow's role in developing mobility and software-defined vehicle solutions. Retail (3%), Consumer Goods (3%), and Energy (3%) illustrate the growing importance of digital platforms, e-commerce, and sustainability-focused transformation.

Smaller sectors, including Health & Medical (1%), Transport & Logistics (1%), Hardware & IoT (1%), and Media (1%), represent niche but strategically important domains where IT supports specialized, often global operations. Although individually limited in scale, these segments contribute to cross-industry knowledge transfer and reinforce Krakow's transition toward a more diversified, domain-driven technology hub.

# IT talent by industry

Our analysis highlights eight core industries employing IT specialists in Krakow, with the top three alone accounting for 59% of the talent pool.



Source: MOTIFE Insights 2026

# Focus

## IT Consulting, IT Services

Krakow is one of the largest IT consulting and engineering hubs in Central and Eastern Europe. The city hosts a dense network of global service providers and engineering companies delivering software development, digital transformation, and managed services.

### Custom software engineering and product development

Companies such as EPAM, GlobalLogic, Grid Dynamics, and SoftServe operate large-scale engineering centers in Krakow, delivering custom software development and product engineering services like cloud-native platforms, data systems, and digital products. SoftServe and EPAM, for example, focus on AI, data, and cloud transformation projects, while Grid Dynamics specializes in digital commerce and high-scale data platforms.

### Digital transformation and enterprise services

Global consulting firms, including Accenture, Capgemini, HCL Technologies, Atos, and Genpact, provide end-to-end digital transformation services, supporting enterprise clients in system integration, cloud migration, cybersecurity, and business process transformation. Capgemini and Accenture deliver large-scale transformation programs, while HCL Technologies and Atos focus on infrastructure, engineering, and managed services.

### Financial services and domain specialization

A strong specialization has developed around financial services. Luxoft, GFT Technologies, Ailleron, and Asseco Poland deliver software for banking, payments, and fintech platforms. These include core banking systems, trading platforms, and digital banking applications.

### Nearshore engineering and scaling hubs

Companies such as N-iX, Intellias, Avenga, Infogain Technologies, and Software Mind operate nearshore development centers supporting European and US clients, focusing on scaling engineering teams, offering full-cycle development, QA, and DevOps services. Many of them expanded in Krakow as part of regional delivery strategies, including relocations and distributed team models.

# 28%

Share of IT talent working in IT Consulting, IT Services companies in Krakow

# 18<sub>K</sub>

The estimated number of IT specialists working in IT Consulting, IT Services companies in Krakow

### The largest IT employers in Krakow – the IT Consulting, IT Services industry

Company	Country of origin	IT headcount ▾
HCL Technologies	India	1500
EPAM	United States	1450
Capgemini	France	1300
Sii	France	1000
Luxoft	Switzerland	770



# Ryszard Pytko

Chief Commercial Officer at Sii Polska



For years, Krakow has been strengthening its position as one of the most important technology hubs in CEE. What role does the Sii Krakow branch play in the operations of Sii Poland?

Krakow has been one of our key operational centers since 2011, when the office was opened. Today, nearly 900 specialists working for the Sii Krakow branch support projects for companies that run their operational, R&D, and technology centers in the region.

We operate both in a project-based model and through long-term technology partnerships, where our teams act as an extension of the client's internal structures. This approach works particularly well for global organizations developing or scaling their technological capabilities.

**Technology partnerships are increasingly seen as an alternative to the traditional service provider model. What does it look like in practice?**

As a long-term technology partner, our teams work in full integration with the client's organization – together we plan, develop, and maintain digital platforms and products. This model accelerates digital transformation and helps build sustainable technological competencies within organizations.

**Why is Krakow an attractive location for technology companies today?**

Krakow offers a strong ecosystem for technology development. Renowned universities such as AGH University of Science and Technology and Cracow University of Technology educate highly skilled specialists, while the presence of global technology companies creates a dynamic and competitive environment.

**Sii Poland has been growing dynamically for the last 20 years. What has the company's journey looked like?**

Since 2006 we have grown organically, responding to the increasing demand for advanced IT services. Over time, we have evolved into a large organization delivering end-to-end technology services and taking responsibility for business outcomes.

Today, Sii Poland is the #1 partner for technology consulting, digital transformation, engineering, and business services in Poland and one of the largest IT employers in the country, with over 7 500 experts.

## Which clients and industries are key to Sii Poland's business?

We work with global leaders across sectors such as Banking, Industrial Manufacturing, Retail & E-commerce, Automotive, Healthcare, and High-tech. Our delivery model combines local expertise with nearshore and offshore capabilities, allowing us to scale teams efficiently and deliver strategic projects for international organizations. We support clients in areas such as Artificial Intelligence and Generative AI, data analytics, cloud transformation, cybersecurity, platform engineering, and DevOps.

## What is the foundation of Sii's success?

Above all, people. We invest heavily in developing our specialists' skills and a work environment that fosters collaboration and innovation. But also new technologies that enable hundreds of managers to work together to deliver top-quality services efficiently.

## What are Sii Poland's plans for further development in Krakow?

We see strong potential for further growth in the region and plan to continue strengthening our local teams while actively contributing to Krakow's innovation ecosystem, remaining one of the city's key IT employers.





# Focus

## Software

Krakow has become one of Central and Eastern Europe's most dynamic software development hubs, attracting both global tech giants and high-performing product companies. Software companies employ 18% of the total IT talent pool, 2nd largest portion after IT Services, IT Consulting.

### Enterprise software

Companies such as Comarch develop enterprise-grade software including ERP systems, billing platforms, customer loyalty solutions, and healthcare IT. These systems are deployed globally across Europe, Asia, and the Americas, often integrating analytics, asset management, and supply chain functionalities.

### Marketing automation

Companies such as Zendesk, SALESmanago, Pegasystems, and ActiveCampaign develop AI-driven platforms focused on CRM, sales automation, and customer engagement. These solutions support customer lifecycle management, communication automation, and data-driven personalization.

### Cloud computing and infrastructure

Companies such as IBM develop cloud and infrastructure software in Krakow, with a focus on hybrid cloud environments, container orchestration, and observability tools supporting large-scale enterprise systems.

### Data analytics and AI/ML

IBM develops enterprise AI and machine learning solutions within its Software Lab. Qualtrics focuses on platforms for analyzing customer and employee experience data, while Relativity builds e-discovery software leveraging advanced analytics and AI to process large-scale datasets for legal and compliance use cases.

# 18%

Share of IT talent working in Software in Krakow

# 12<sub>K</sub>

The estimated number of IT specialists working in Software companies in Krakow

## The largest IT employers in Krakow – Software industry

Company	Country of origin	IT headcount ▼
Comarch	Poland	1700
IBM	United States	1000
Pegasystems	United States	450
Google	United States	400
Qualtrics	United States	380



# Tomasz Krzyżak

VP, Software Engineering at Zendesk



The industry is rapidly shifting to adoption of GenAI, and Zendesk and our Poland teams are at the center of this transformation and revolution.

When I look at our broader strategy, Zendesk is positioning itself as the definitive AI-first "Resolution Platform". We aren't just managing support tickets anymore; we are driving actual resolutions by seamlessly blending human expertise with AI agents. Our platform now powers nearly 5 billion customer resolutions annually. We've aggressively expanded our capabilities through strategic acquisitions—like Ultimate for virtual agents, Klaus for QA, and Local Measure for voice AI — ensuring we deliver exceptional service to every person on the planet.

But we don't just sell AI; we live it in our own engineering culture. Internally, also in Krakow, we've made a massive push for GenAI adoption to accelerate how we build software. By the end of 2025, over 75% of our code-contributing engineers were using GenAI tools daily, which exceeded our own targets.

The impact has been tangible: our high-usage engineers increased their throughput by 24% year-over-year and cut their cycle times in half compared to low users. On average, our engineers reported saving about 46 hours a month—essentially gaining a '5-week month' in productivity. Moving into 2026, we are shifting our internal focus from pure adoption to 'Workflow Automation at Scale' - Agentic Workflows - targeting high-toil tasks like PR reviews to keep our teams fast and efficient.

Poland, and Krakow in particular, continues to be seen as an attractive location for building product development teams, especially when companies are looking to access strong engineering talent. At the same time, scaling AI and ML teams can be more demanding, mainly due to the still-developing depth of experience in these fields.

This creates a clear opportunity for further growth. Strengthening university programs and investing in upskilling existing employees can help accelerate the development of advanced AI expertise and support the next phase of the market's evolution.

## Focus

# Engineering, Manufacturing

Engineering and manufacturing accounts for roughly 5% of Krakow's IT headcount – a smaller share than software or finance, but disproportionately senior and embedded in mission-critical engineering work. The cluster sits inside three distinct areas, each anchored by global names that have run R&D, controls, and engineering capability out of Krakow for over a decade.

### Industrial equipment

Krakow has emerged as a serious engineering site for global industrial-equipment makers – automation and electrification platforms at ABB, aerospace and energy control systems at Woodward, and connectors, sensors, and embedded electronics at TE Connectivity. The work here sits closer to product engineering than back-office IT: firmware, embedded software, mechanical and electrical design, and the test and validation infrastructure that supports global manufacturing programs.

### Materials

Industrial-materials majors run lean but technically deep teams in Krakow – Air Liquide on industrial gases and process digitalization and International Paper on packaging and supply-chain platforms. These centers skew toward SAP, data engineering and applied analytics.

### Security, access, and electronics

The Krakow security and electronics cluster pairs hardware-led incumbents with data-platform vendors – physical and logical access at ASSA ABLOY and HID, electronics at Samsung, and data infrastructure and storage at Hitachi Vantara. The roles here cut across firmware and device software, identity and credentialing platforms, cloud and edge analytics, and the cyber-security disciplines that increasingly bind those layers together.

5%

Share of IT talent working in engineering and manufacturing companies in Krakow

3.3K

The estimated number of IT specialists working in engineering and manufacturing companies in Krakow

Company	IT headcount in Krakow	Country of origin
ABB	600	Switzerland
ASSA ABLOY	480	Sweden
Air Liquide	170	France
International Paper	160	United States
HID	150	United States



# Gabriel Jatzak

Senior Director Engineering  
at HID Global



Organizations worldwide are fundamentally reshaping how they manage identities. HID's research-based on insights from over 1 500 security and IT professionals, end users and partners-shows a strong focus on building trust, strengthening protection and preserving user choice across increasingly converged physical and digital environments.

Key trends shaping this shift include:

- **Mobile credentials** moving from emerging innovation to a standard expectation.
- **Biometrics** evolving from a secondary MFA tool to a primary access method.
- **Real-time location solutions** expanding into mainstream use, especially in safety critical industries where compliance and worker protection are essential.

- **Physical digital identity convergence** becoming an expected capability as organizations recognize that separating these domains creates risk and inefficiency.
- **AI enhanced verification** accelerating adoption as organizations seek stronger, more adaptive authentication, balanced with evolving data privacy regulations.

Across the board, organizations now see **integrated identity management** as essential. Unifying physical and digital security-powered by real time data and analytics-enables better protection, improved efficiency, smoother user experiences and stronger compliance, delivering business value far beyond basic security.

# International unicorns in Krakow

Krakow has established itself as a strategic location for international unicorns building R&D teams. As of 2026, the city hosts 19 unicorn companies across fintech, AI, cybersecurity, SaaS, and e-commerce, including Revolut, Zendesk, Papaya Global, Grammarly, H2O.ai, Tanium, and project44.

These companies develop core products in Krakow, covering areas such as AI systems, financial platforms, and logistics infrastructure. Their presence strengthens the local ecosystem by transferring product know-how and exposing engineers to global-scale technologies.

Globally, the number of private companies valued at \$1 billion now exceeds 1 300 companies, according to CB Insights. While Krakow has not yet produced a local unicorn, companies such as Brainly and Synerise remain strong candidates.

# 19

International unicorns with R&D centers in Krakow

## International unicorns in Krakow



Artificial intelligence  
Mountain View, United States



E-commerce  
Austin, United States



Fintech  
New York, United States



Supply chain  
Chicago, United States



E-commerce  
Marina del Rey, United States



Fintech  
Amsterdam, Netherlands



Fintech  
San Francisco, United States



Fintech  
London, United Kingdom



Fintech  
London, United Kingdom



Fintech  
London, United Kingdom



Foodtech  
Dubai, United Arab Emirates



IT services and consulting  
Kirkland, United States



Software  
Chicago, United States



Software  
Redwood City, United States



Software  
Sunnyvale, United States



Software  
Santa Clara, United States



Software  
San Francisco, United States



Software  
Miami, United States



Software  
Chicago, United States

Source: cbinsights.com, The Complete List Of Unicorn Companies, 2026

# Startups

## In collaboration with OMGKRK Foundation, [omgkrk.com](https://omgkrk.com)

Krakow's start-up ecosystem continues to evolve, driven by innovation across tech domains and industries. From AI and MedTech to cleantech and enterprise software, local ventures are responding to global challenges with advanced digital solutions. This chapter explores the key technology specializations, industry focus areas, and founding trends among Krakow-based start-ups—offering a snapshot of the city's dynamic entrepreneurial landscape in 2025.

### Krakow startups landscape

Krakow is home to over 250 start-ups, led by ambitious entrepreneurs with an international outlook. These ventures operate across a range of industries, reinforcing the city's growing reputation as a hub for innovation in Central and Eastern Europe. Backed by a strong talent pool, academic excellence, and a supportive ecosystem, Krakow continues to attract interest from investors, accelerators, and global partners.

The region's commitment to innovation is further underscored by Małopolska's designation as a European Entrepreneurial Region 2024, reflecting ongoing efforts to strengthen entrepreneurship and support start-up growth across the region.

### Specializations of Krakow start-ups

Krakow's start-up scene showcases a diverse range of domains, with a growing focus on advanced digital solutions across industries. AI remains the leading specialization among Krakow-based start-ups, followed by business automation, enterprise software, and MedTech.

In 2024, 54 start-ups reported AI as their core technology focus—up from 37 the previous year. This rise underlines the growing confidence in AI-driven innovation and its potential to drive transformation across sectors such as finance, healthcare, and manufacturing.

There is also a visible uptick in interest in sustainability and cleantech, with 17 start-ups focusing on green solutions, as environmental impact becomes a more prominent factor in product development and investment decisions.

# 250+

Estimated number of start-ups in Krakow

# 59%

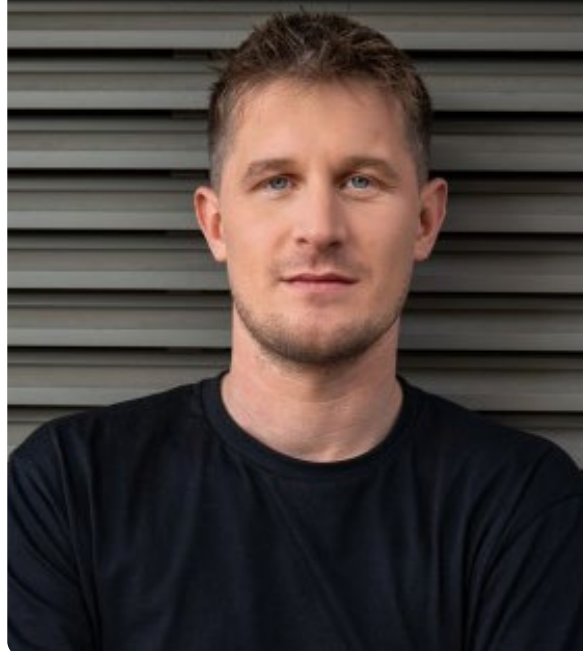
Of Krakow startups were established in the last 5 years

Source: Krakow Startup Report 2024, OMGKRK

# tequipy

## Tomasz Stawarski

CEO & Founder at Tequipy



We come from Krakow and it's here that Tequipy was born. Two years ago, we were a team of two. A year later, six. Today, we're over 20 strong. Why did we choose this city? It's hard to point to just one reason, but the mature ecosystem and access to truly exceptional talent are what won us over.

The truth is, we want Krakow to be a place where products solving real, global problems are built. And that's exactly what we do at Tequipy. We bring order to one of the most overlooked yet critical areas of business operations: the entire lifecycle of company hardware and software.

Tequipy was founded on a simple belief: modern, global companies shouldn't have to waste time dealing with the chaos of hardware management.

Today, we're building a global platform that enables companies to purchase, onboard, service, offboard, and manage employee equipment across more than 180 countries. We have one clear goal: to lift the operational burden from IT and HR teams so they can focus on growth—not on tracking laptops, chasing couriers, or coordinating returns.

We combine technology with a strong operational backbone, which is why our clients see us not just as a tool, but as a true partner in scaling their business. Our average delivery time is three business days, and the results speak for themselves: since the start of our partnership, Booksy has saved over 3 200 hours, Remofirst saves more than 25 hours and \$3 500 each month, and Gigs has achieved savings of over 100 hours and \$16 000.

Who else has chosen to trust us? Today, more than 150 companies from around the world are already our clients.

# Industries in which Krakow startups operate

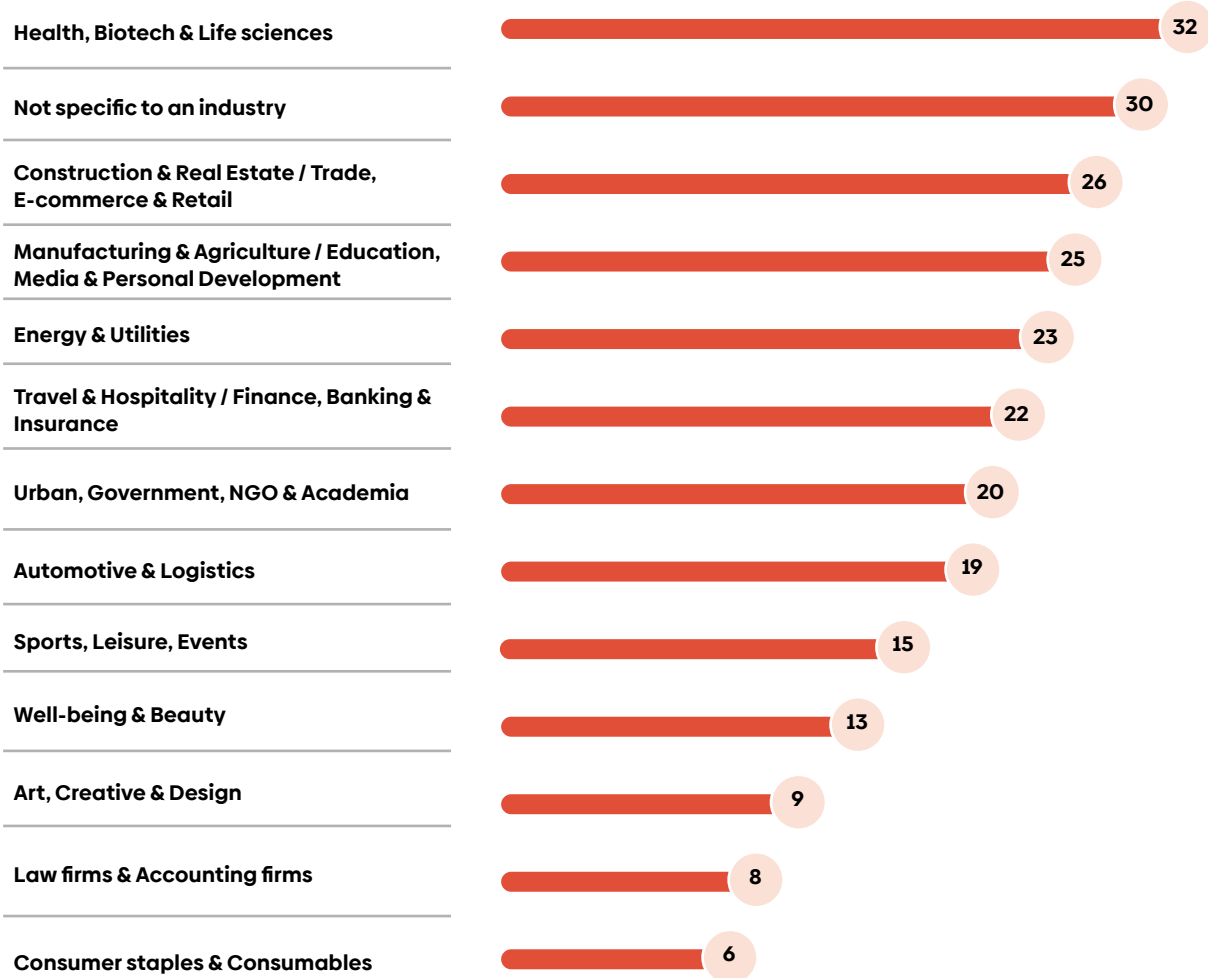
Krakow's startup ecosystem spans a broad range of industries, reflecting its versatility and depth. Among 123 surveyed start-ups, the most common focus is Health, Biotech & Life Sciences, with 32 companies (26%), underscoring continued interest in digital health and biotech innovation.

Construction & Real Estate and Trade, E-commerce & Retail follow with 26 startups each (21%), driven by demand for infrastructure and online commerce solutions.

Education, Media & Personal Development and Manufacturing & Agriculture also rank high, with 25 companies each, signaling activity in digital learning, personal development, and modern production tech.

Notably, 30 startups reported no specific industry, suggesting multi-sector models or cross-industry product focus.

## Number of startups operating in particular industries\*



Source: Krakow Startup Report 2024, OMGKRRK, \*based on a survey of 123 Krakow startups

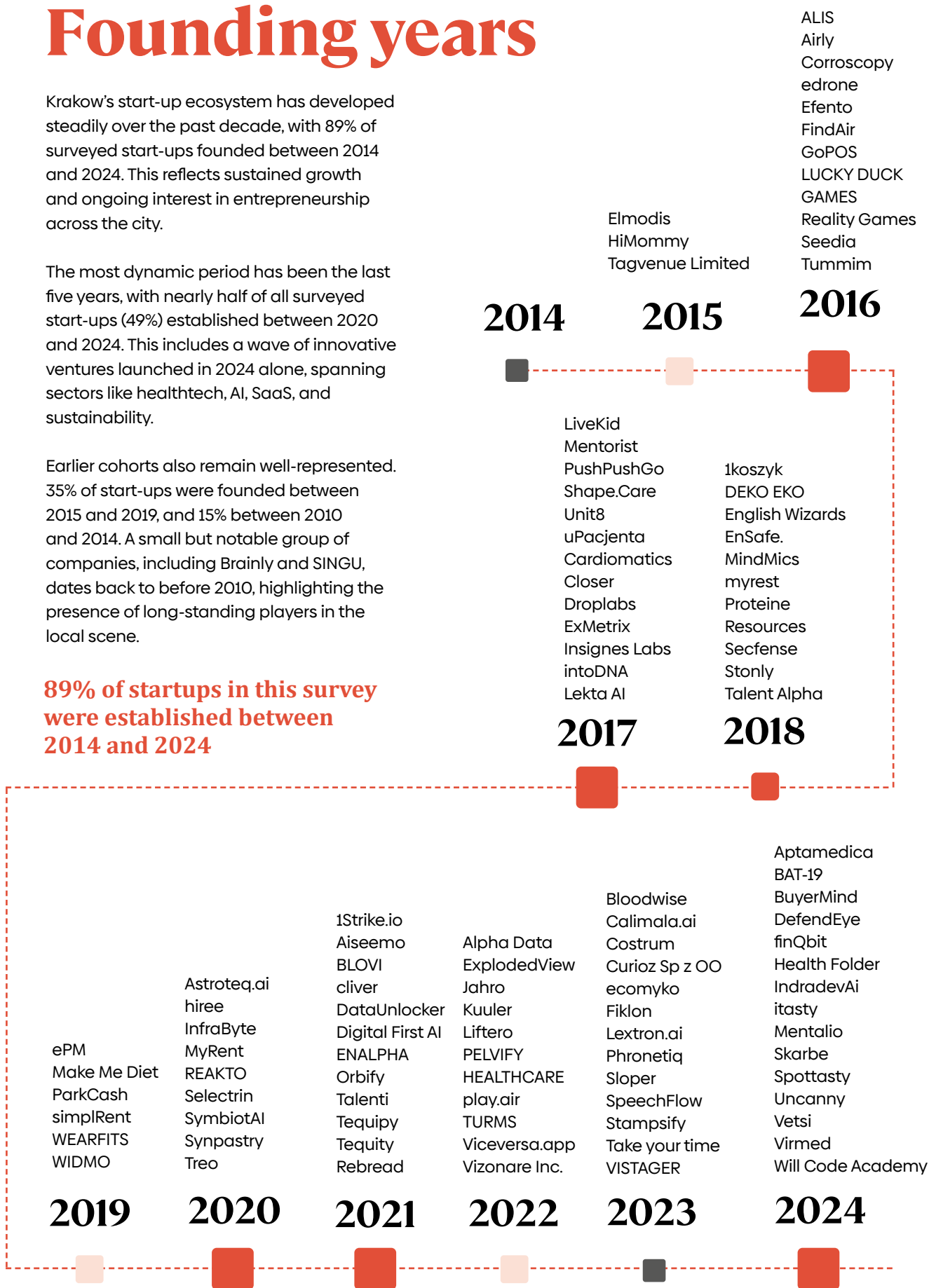
# Founding years

Krakow's start-up ecosystem has developed steadily over the past decade, with 89% of surveyed start-ups founded between 2014 and 2024. This reflects sustained growth and ongoing interest in entrepreneurship across the city.

The most dynamic period has been the last five years, with nearly half of all surveyed start-ups (49%) established between 2020 and 2024. This includes a wave of innovative ventures launched in 2024 alone, spanning sectors like healthtech, AI, SaaS, and sustainability.

Earlier cohorts also remain well-represented. 35% of start-ups were founded between 2015 and 2019, and 15% between 2010 and 2014. A small but notable group of companies, including Brainly and SINGU, dates back to before 2010, highlighting the presence of long-standing players in the local scene.

**89% of startups in this survey were established between 2014 and 2024**



Source: Krakow Startup Report 2024, OMGKRK

# Most successful Krakow startups

Krakow is home to a number of high-performing start-ups that have scaled their operations, attracted international investors, and achieved global success. These success stories illustrate the strength of the local ecosystem and serve as inspiration for the next generation of founders.

Company	Description
<b>Airly</b>	Airly, founded in 2016, develops air-quality monitoring systems combining IoT sensors and analytics. It operates 2 800+ sensors across 500+ cities, including Krakow deployments and the nationwide #PolskaOddycha initiative.
<b>Brainly</b>	Brainly, founded in 2009, operates a global learning platform with AI tools. Key products include the AI Learning Companion and Test Prep feature for personalized exam preparation.
<b>edrone</b>	edrone, founded in 2016, provides e-commerce CRM and marketing automation. Core use cases include abandoned cart recovery, product recommendations, and automated omnichannel campaigns.
<b>HCM Deck</b>	HCM Deck, founded in 2017, offers an HR platform for onboarding and development. It supports structured onboarding, skills tracking, and performance workflows.
<b>LiveKid</b>	LiveKid, founded in 2017, provides SaaS for daycare management. It covers attendance, billing, communication, and daily operations for childcare centers.
<b>Omni Calculator</b>	Omni Calculator, founded in 2015, builds a platform of specialized calculators. It offers thousands of tools across finance, health, and science for global users.
<b>Orbify</b>	Orbify, founded in 2021, develops satellite data analytics tools. Use cases include carbon monitoring, climate risk analysis, and energy infrastructure tracking.

Source: Krakow Startup Report 2024, OMGKRRK

<b>Reality Games</b>	Reality Games, founded in 2015, develops location-based mobile games. Titles like Landlord and Monopoly World use real-world geospatial and property data.
<b>Synerise</b>	Synerise, founded in 2013, builds enterprise AI for behavioral data processing. Its technology powers real-time recommendations and automated decision systems.
<b>Tequipy</b>	Tequipy, founded in 2022, manages global IT equipment lifecycle. Its platform covers procurement, deployment, and recovery, improving onboarding efficiency.





# Karolina Paluch

VP of Marketing at OMGKRRK,  
Foundation supporting Krakow's startups



Krakow is expanding its tech ecosystem identity with high-growth startups building products locally.

The ecosystem thrives on a blend of world-class engineering talent, a steady pipeline of ambitious graduates, and a network of both mature and early-stage founders.

The rise of AI has further accelerated this growth and local startups are leveraging it to deliver value, achieve sales and scale faster. For instance, **Synerise** uses behavioral AI to provide real-time predictive analytics for global brands, while **Orbify** utilizes AI and Earth observation data for geospatial applications. In HealthTech, **Cardiomatics** automates ECG analysis, delivering clinical reports in minutes. Meanwhile, **edrone** revolutionizes e-commerce through autonomous CRM and voice commerce tools.

There are steady new batches of early stage startups entering the market, raising angel and pre-seed investments. **Gaius Lex** disrupts the legal sector with automated document

analysis, **Mentalio** uses AI to personalize mental health support while **The Swarm** utilizes advanced algorithms to optimize social recruiting and network-driven hiring. Examples like this represent a broader trend where deep tech meets practical application.

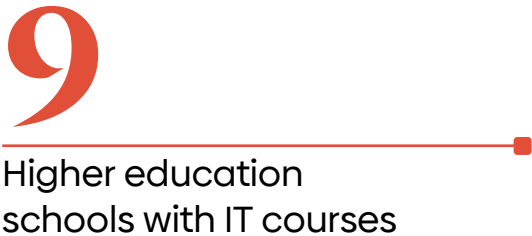
Krakow has now produced its first generation of successful entrepreneurs who are supporting the next generation, completing a healthy ecosystem cycle. With the active backing of the Malopolska Region and the City of Krakow, the startup community is strategically positioned to help Krakow become a competitive European technology ecosystem.

At the same time, international interest in Krakow's startups and scaleups is rising, with TECH-ON and Summer Jam serving as key innovation diplomacy events. That's why ecosystem actors like the **Foundation Supporting #OMGKRRK** play a crucial role, connecting founders with international partners through programs and networking events that accelerate growth and foster a culture of constant innovation.

# Education and science

Walking through Krakow, the city's academic character is immediately visible. With around 137 000 students, universities and campuses play a central role in shaping both the urban landscape and the long-term supply of talent for the local technology sector. This strong student presence contributes to a steady inflow of graduates who enter the job market each year and support the growth of international and Polish technology companies operating in the city.

Krakow is home to 17 higher education institutions, including 9 universities offering IT-related programs. Together, they educate approximately 13 800 computer science students, with close to 2 900 ICT graduates joining the workforce annually. A notable share of students begins gaining professional experience during their studies, often combining academic education with internships or part-time roles in technology companies.



Source: stat.gov.pl, agh.edu.pl 2026



# Jacek Drabik

Director of Education Division  
at Krakow Municipality



The world is transforming faster than ever before. Artificial intelligence, automation, robotics and digitalization are reshaping economies and redefining the nature of work. In the coming decade, AI, biotechnology, quantum computing and green energy will not just support innovation – they will define it.

Cities like Krakow face demographic challenges and a competitive global environment. The competition for highly skilled professionals is intensifying. Cities are no longer competing only for investments but also for talent, innovation capacity, and adaptability. In today's reality, education must act as an active partner to the labor market - anticipating trends, working closely with business, and constantly adapting curricula to change.

The talent of tomorrow learns continuously, adapts quickly, combines critical and creative thinking with strong digital background including AI, data analytics, IoT, cybersecurity, and immersive technologies. Mental resilience, stress management, collaboration in diverse teams with leadership, empathy, emotional intelligence, and communication skills are becoming more important. Education therefore must be interdisciplinary, flexible, and closely aligned with economic transformation.

Krakow builds systemic cooperation between education institutions, academia and business. Ex. Krakow Career Center drives Step Into Your Career and Go For Your Dreams projects with reference visits at IBM, Hitachi, Volvo, Google, Sabre, Infogain and GE Healthcare. Technical High School of Communications organizes workshops, laboratory trainings, internships with ELTEL, Salumanus, DCN Europe, Emitel and 3CX. Specialists from Astor, Cisco, Satel, Elsta, Huawei, Finder and Unical deliver lessons to Electrical School Complex nr 1 pupils. Nokia, Cisco deliver programming languages workshops to 31st General Secondary School pupils. And many more.

Recently, we opened new education lines like cybersecurity, waste management, ports and terminals operations or freight forwarding technicians at technical high schools. Cybersecurity, AI, Geospatial Informatics, GBS, Additive Manufacturing are only selected examples of new education specializations opened recently at Krakow UJ, AGH or PK universities.

These examples clearly show that the Krakow education system must not remain reactive – it must continuously observe, anticipate, and respond to change, evolving at the same pace as the world it serves.

# Main universities

## AGH University of Science and Technology

AGH University of Science and Technology has been recognized as the number 1 top technical university in Poland in 5 foreign rankings in 2024/2025 including Academic Ranking of World Universities 2025 and The Center for World University Rankings 2023. The quality of education is reflected in the graduates of the university being well-received in the job market with over 65% finding employment before graduation.



### At a glance

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Founded in **1913**

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**18 500** students

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**5 500** ICT students

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**1 300** ICT graduates yearly

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**10** ICT courses offered

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[agh.edu.pl](http://agh.edu.pl)

### Computer science courses offered at diverse faculties

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- Electronics and Telecommunications
- Software development methods
- Data Science
- Modern Technologies in Forensics
- IT technologies and business processes
- ERP systems on the example of SAP ERP
- Database systems
- Cybersecurity in practice
- Machine Learning and AI
- Automatics and Robotics



## Jagiellonian University

Jagiellonian University itself is the oldest university in Poland with over 600 years of tradition and this year the faculty of Mathematics and Computer Science at the Jagiellonian University celebrates its 20th year. The year 2023 also brought recognition of the Computer Science course by the national ranking by Perspektywy magazine as the 2nd best in the category in Poland. And as of the academic year 2024-25 a new Bachelor's degree program is offered - Artificial Intelligence.



UNIWERSYTET  
JAGIELLOŃSKI  
W KRAKOWIE

### At a glance

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Founded in **1364**

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**34 000** students

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**1 500** ICT students

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**320** ICT graduates yearly

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**3** ICT courses offered

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[uj.edu.pl](http://uj.edu.pl)

### Courses offered

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- Computer Science, including software engineering, modeling, artificial intelligence, and machine learning
- Analytical Computer Science, including algorithms, software engineering, programming, operating systems, and web
- Computer Mathematics, including mathematics analysis, combinatorics and probability theory, programming languages, algorithms, and software engineering



## Krakow University of Technology (Politechnika Krakowska)

Krakow University of Technology (Politechnika Krakowska) is a university focusing on educating Krakow's engineering staff and persistently improving local scientific and technical thought, with their involvement in the creation of KPT in 1997 as an example. It was recognized in the 2024 edition of QS World University Rankings along with 33 other universities from Poland. The graduates of University of Technology ICT courses are well recognized and appreciated in the job market.



**Politechnika Krakowska**  
im. Tadeusza Kościuszki

### At a glance

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Founded in **1945**

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**12 000** students

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**3 000** ICT students

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**400** ICT graduates yearly

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**3** ICT courses offered

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[pk.edu.pl](http://pk.edu.pl)

### Courses offered

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- Computer Science, including Python and Java programming, operational systems, data analysis, and Artificial Intelligence
- Data Science, including data analysis, statistics, machine learning, and symbolic programming languages like R, Python, and more
- Cybersecurity, including databases, AI in cybersecurity, and blockchain technology





# Bogna Halska-Pionka

Plenipotentiary of the Mayor of Krakow  
for Cooperation with the Scientific  
and Academic Community



Krakow remains one of the most important scientific and academic centers in Central and Eastern Europe, as well as one of the leading locations for research and innovation development in Poland. Its significance is not determined solely by its long academic tradition, but above all by its ability to creatively evolve in response to the changing conditions of the modern economy.

The city is home to 17 higher education institutions, including 8 universities, representing a wide range of educational profiles and organizational models. These include, among others, the Jagiellonian University, AGH University of Science and Technology, Cracow University of Technology, and the Cracow University of Economics. In total, 137.8 thousand students are enrolled in Krakow, including 9.6 thousand international students, giving the academic environment a distinctly international dimension.

The prominence of Krakow's academic ecosystem is defined not only by its scale, but also by its diversity and its ability to transcend traditional boundaries between disciplines. Alongside the social sciences and humanities, fields related to computer science, artificial intelligence, and broadly understood digitalization are developing intensively, increasingly entering into dialogue with other areas of knowledge and setting new directions for research.

Equally important is the well-developed infrastructure supporting collaboration between academia and industry. Specialized units operate within major universities, such as the Technology Transfer Center at the Jagiellonian University, the Center for Technology Transfer at AGH University of Science and Technology, and analogous structures at other institutions. These entities support the commercialization of research outcomes, from identification and intellectual property protection to cooperation with businesses and the creation of spin-off companies. As a result, knowledge generated within academia extends beyond theoretical circulation and finds practical application.

A significant role is also played by advanced research infrastructure. Institutions such as the Jagiellonian Center for Innovation, the Malopolska Centre of Biotechnology, the National Synchrotron Radiation Centre SOLARIS, and the Academic Centre for Materials and Nanotechnology AGH conduct high-level research across areas including biotechnology, nanotechnology, energy, materials engineering, as well as applications of artificial intelligence in natural and technical sciences.

Scientific institutions also play an important role, including the Polish Academy of Arts and Sciences and units of the Polish Academy of Sciences, comprising 11 institutes, 2 centers, 4 departments, and 3 laboratories. This landscape is further complemented by institutes within the Łukasiewicz Research Network and the LifeScience Krakow Cluster, which holds the status of a National Key Cluster and integrates scientific,

business, and public sector activities around health and quality of life.

In recent years, the impact of digitalization has become increasingly visible, both in the way research is conducted and in the functioning of the city itself. The development of the digital twin concept exemplifies the use of advanced analytical tools in urban planning and management.

At the same time, new forms of collaboration and solution testing are emerging, such as urban innovation labs and incubators, including

initiatives planned within the Zabłocie 20.22 Social and Economic Innovation Cluster. These initiatives enable the implementation of pilot projects and their evaluation in real-life conditions, while actively involving residents in identifying needs and co-creating solutions.

In this context, Krakow continues to strengthen its position as a center where scientific activity, technological development, and socio-economic practice remain closely interconnected, and where knowledge, rather than being an end in itself, serves as a foundation for further application and transformation.



# Public institutions

Krakow's position as a leading technology and business hub is driven not only by talent and innovation, but also by strong collaboration between the public and private sectors. Key regional stakeholders including the City of Krakow, the Malopolska Region, and the Krakow Technology Park playing an active role in shaping a supportive environment for investment, business development, and innovation.

Over the years, Krakow and the wider region have built a stable ecosystem that encourages growth and entrepreneurship. Public institutions work closely with businesses, academia, and the local community, providing targeted support for both new entrants and companies scaling their operations.

At the regional level, Malopolska focuses on strengthening the business climate through partnerships, infrastructure development, and funding initiatives that support innovation and enterprise. This approach is aligned with the needs of the business community and contributes to the region's long-term economic direction.

Krakow Technology Park complements these efforts by supporting companies at different stages of development, facilitating investment, and enabling digital transformation through collaboration with industry and academia.

Together, these institutions form a coordinated framework that supports the development of a resilient and forward-looking economy. Their role and impact are further explored in the following sections.





# Stanisław Mazur

Vice Mayor of Krakow



**Krakow is entering a new phase as one of the most dynamic technology hubs in Central Europe. Our ambition is to build a city that combines advanced expertise, innovation, and global competitiveness. To achieve this, we consistently support sectors with the strongest export, scientific, and economic potential.**

Krakow's economy is undergoing a transformation toward a model in which advanced skills and specialized knowledge play a central role. The city is becoming a space where cutting-edge information and communication technologies, research and development centers, and data analytics continue to thrive. As a result, IT and digital technologies have become key priority areas for growth. Once a supporting sector, IT has evolved into the core of Krakow's competitiveness, while related fields such as AI, cybersecurity, deep tech, and dual-use technologies are gaining increasing importance.

Krakow is one of the largest IT hubs in the region, with a mature business environment, numerous R&D centers, a vibrant startup ecosystem, and a strong academic base. Local universities provide highly qualified specialists, creating solid foundations for the development of

advanced technologies. A notable example is the space sector, where Krakow is emerging as one of Poland's leading centers for space technologies and is seeking to host a Research and Development Center of the European Space Agency (ESA), supported by the strength of the local scientific and business ecosystem.

At the same time, the local government actively reinforces this potential by offering investors comprehensive support at every stage of project implementation. A key role is played by the Municipal Investor Support and Innovative Economy Center, which provides professional assistance to both domestic and international investors ([dlabiznesu.krakow.pl](http://dlabiznesu.krakow.pl)). Another initiative that fosters entrepreneurship and innovation is the Zablocie 20.22 Social and Economic Innovation Cluster, a modern urban space that brings together business, social initiatives, creativity, and local community development. In addition to a business incubator and coworking zones, the cluster offers training programs and expert advisory services ([zablociespace.pl](http://zablociespace.pl)).

Krakow continues to strengthen its position as a metropolitan center that brings together technology, science, creativity, and responsible development. We believe the future of our city lies in a knowledge-based economy, strong, innovative, and open to the world.



MAŁOPOLSKA

# Rafał Kosowski

Director of Corporate Governance  
and Economy Department  
at Marshal Office  
of the Malopolska Region



Malopolska is recognized as a dynamic economic center and a highly attractive environment for business development, where companies benefit from a supportive and innovation-oriented ecosystem. With a strong academic base, access to skilled talent, and a growing innovation ecosystem, the region offers significant potential for the development of new companies.

Importantly, Malopolska has been twice awarded the title of European Entrepreneurial Region by leading European institutions, recognizing both its strong economic potential, the effectiveness of its policies in fostering entrepreneurship and supporting business development.

The initiatives we carry out in the region focus mainly on developing companies' capabilities. Without this, we cannot talk about growth or

competitiveness in global markets. For example, the **#StartUP Malopolska** program offers tailored incubation and acceleration paths for innovative companies, providing mentoring, expert services, and access to international events. With our support startups can refine their ideas, build MVPs, and scale globally.

Complementary initiatives such as the **Hackathon for Malopolska** and **Business Idea program** foster early-stage entrepreneurship. They engage students and aspiring founders in solving real challenges, offering mentoring and networking opportunities, as well as helping transform innovative ideas into viable, market-ready ventures. **The Business in Malopolska Center** plays a key role in supporting investors and companies by providing comprehensive information, advisory services and assistance in navigating the regional business environment. It acts as a one-stop-shop, facilitating investment processes and connecting businesses with relevant partners, institutions and opportunities across the region.



# Andrzej Kulig

President of the Board  
at Krakow Technology Park



Being long involved in developing Malopolska's innovation ecosystem, we can clearly see how entrepreneurs' needs are evolving, and how essential it is to combine strong foundations with forward-looking thinking. Krakow Technology Park consistently serves as a trusted partner in this process.

One of our key instruments remains the Polish Investment Zone (Polska Strefa Inwestycji), offering tax incentives and comprehensive investment support. For many companies, this is a strong impulse to scale operations and locate high-value-added projects in the region, particularly in IT and advanced manufacturing.

At the same time, we strengthen companies' technological competitiveness. Through

hub4industry, we support the digital transformation of SMEs, enabling safe and effective implementation of Industry 4.0 solutions. Through KPT ScaleUP, we help startups test technologies with large industrial partners, accelerating the path from concept to market. In 2026, we are placing special emphasis on defence and space innovation. We are co-creating FORT Krakow and advancing dual-use projects, while strengthening regional capabilities in space technologies by supporting know-how transfer and access to European funding programs.

A strategic approach that combines economic security with investment in breakthrough technologies is essential. Our role is not only to respond to trends, but to help shape Malopolska as an attractive location for ambitious, innovation-driven companies.

# Communities

## Navigating the Krakow IT network

Krakow's reputation as a leading academic hub continues to attract a dynamic population of young people passionate about technology. This group includes students, recent graduates, and aspiring professionals who are actively exploring and developing their interests in various tech domains.

In recent years, many of these individuals have organized themselves into focused community groups centered around specific technologies and disciplines. These communities bring together tech enthusiasts, developers, and professionals for regular meetups that foster knowledge sharing and peer learning.

Beyond creating space for connection and collaboration, these communities also offer opportunities for companies to engage with local talent - whether through sponsorship, partnerships, or guest speaking at events - strengthening their presence within the tech ecosystem.

The following section highlights a selection of Krakow's IT communities, grouped by theme: Start-ups, Technology & Programming Languages, Software Development, Women in Tech, and QA & Technical Communication. Each listing includes key information about the community's focus and activity.

Start-ups	
<b>#OMGKRK</b>	The leading startups and innovation foundation in Krakow. OMGKRK aims to create an innovation environment in Krakow by helping to build a community, promote the ecosystem, and educate tech professionals and entrepreneurs. <a href="http://omgkrk.com">omgkrk.com</a>
<b>Krakow Miastem Startupów</b>	The purpose of the Foundation's activity is to support start-ups by building relationships between them and businesses, government administration, and higher education institutions. <a href="http://kms.org.pl">kms.org.pl</a>
<b>Krakow Technology Park</b>	A community committed to enhancing Małopolska's economy and innovation. Offers support across all technology sectors, with a focus on Industry 4.0 and gaming. <a href="http://kpt.krakow.pl">kpt.krakow.pl</a>
<b>OpenCoffeeKRK</b>	The community organizes meetings for start-up representatives, offering a platform for discussion and knowledge sharing in the industry. <a href="https://meetup.com/pl-PL/opencoffekrakow/">meetup.com/pl-PL/opencoffekrakow/</a>
<b>La French Tech Krakow</b>	A dynamic community connecting the French and Polish technology ecosystems, dedicated to fostering partnerships and cultivating success stories across borders. <a href="http://krakow.lafrenchtech.community">krakow.lafrenchtech.community</a>
<b>hub:raum</b>	Deutsche Telekom's tech incubator, bridges early-stage start-ups with leading European telecom companies, facilitating innovation transfer and creating business opportunities. <a href="http://hubraum.com/initiatives/prototyping-campus/campus-krakow">hubraum.com/initiatives/prototyping-campus/campus-krakow</a>

## Technologies & Programming languages

<b>Krakow JS</b>	<p>The community organizes regular meetups aimed at bringing together JavaScript professionals for learning and networking, fostering a vibrant environment for enthusiasts in the city.</p> <p><a href="https://meetup.com/pl-PL/krakowjs/">meetup.com/pl-PL/krakowjs/</a></p>
<b>Polish Java Users Group</b>	<p>A community of people who enjoy programming on the Java Virtual Machine (JVM). They host frequent gatherings to share tips, learn, and meet fellow users of Java.</p> <p><a href="https://meetup.com/pl-PL/polish-java-user-group/">meetup.com/pl-PL/polish-java-user-group/</a></p>
<b>Pykonik</b>	<p>The community serves as the meeting point for Krakow's Python community, focusing on face-to-face exchanges of experiences and channeling their interest in this programming language into actions.</p> <p><a href="https://pykonik.org">pykonik.org</a></p>
<b>AWS User Group</b>	<p>A community for developers and enthusiasts passionate about the potential of cloud technology. The group offers a platform for enhancing AWS knowledge and networking.</p> <p><a href="https://meetup.com/pl-PL/aws-user-group-krakow/">meetup.com/pl-PL/aws-user-group-krakow/</a></p>
<b>KGD .NET</b>	<p>A community that brings together .NET technology enthusiasts, welcoming both experienced professionals and beginners. They offer a platform for talks and meetups.</p> <p><a href="https://meetup.com/pl-PL/kgd-net/">meetup.com/pl-PL/kgd-net/</a></p>
<b>Krakow Scala User Group</b>	<p>The group connects enthusiasts of the Scala programming language and its related technologies through regular meetups, offering a community of learning and exchange.</p> <p><a href="https://meetup.com/pl-PL/krakow-scala-user-group/">meetup.com/pl-PL/krakow-scala-user-group/</a></p>
<b>Krakow Ruby User Group</b>	<p>A community of Ruby developers and enthusiasts gathering in Krakow for meetups. Open for those interested in speaking or assisting with event organization.</p> <p><a href="https://krug.org.pl">krug.org.pl</a></p>
<b>Angular Krakow</b>	<p>A community for Angular enthusiasts, hosting regular meetups in and around Krakow to unite web developers in sharing knowledge, trends, and best practices in Angular development.</p> <p><a href="https://facebook.com/AngularKrakow">facebook.com/AngularKrakow</a></p>
<b>Erlang &amp; Elixir Group Krakow</b>	<p>The group unites enthusiasts eager to explore Erlang and Elixir languages through knowledge sharing and networking. They welcome everyone from architects to newbies in an inclusive environment.</p> <p><a href="https://meetup.com/pl-PL/elixir-krakow/">meetup.com/pl-PL/elixir-krakow/</a></p>
<b>React Native Community Krakow</b>	<p>The community invites mobile app developers and offers a platform for networking, sharing ideas, and tackling diverse challenges in an open-source environment.</p> <p><a href="https://meetup.com/pl-PL/react-native-community-krakow-rnck/">meetup.com/pl-PL/react-native-community-krakow-rnck/</a></p>
<b>Flutter Krakow</b>	<p>An open community welcoming individuals eager to explore Flutter technology. Their events offer a platform for learning, sharing experiences, and connecting with fellow Flutter enthusiasts.</p> <p><a href="https://meetup.com/pl-PL/flutter-cracow/">meetup.com/pl-PL/flutter-cracow/</a></p>

## Software Development & Data

<b>GDG Krakow</b>	A community for users and developers of Google technologies, sharing their knowledge. The group is independent of the company Google. <a href="https://gdg.community.dev/gdg-krakow/">gdg.community.dev/gdg-krakow/</a>
<b>OWASP Poland</b>	A non-profit dedicated to enhancing software security through visibility, enabling informed decisions about software risks globally. Open to all interested in software security. <a href="https://meetup.com/pl-PL/owasp-poland/">meetup.com/pl-PL/owasp-poland/</a>
<b>Data KRK</b>	The group promotes Data Science, focusing on Big Data, NoSQL, and Machine Learning. They organize regular meetups for data enthusiasts and professionals seeking to explore and share innovative ideas. <a href="https://meetup.com/pl-PL/datakrk/">meetup.com/pl-PL/datakrk/</a>
<b>DDD-KRK</b>	The community focuses on the learning and adoption of Domain-Driven Design, aiming to share knowledge, ideas, and experiences while promoting DDD in Krakow. <a href="https://meetup.com/pl-PL/ddd-krk/">meetup.com/pl-PL/ddd-krk/</a>
<b>PyData</b>	The Krakow group is a part of the global PyData.org network. A community dedicated to Data and Machine Learning enthusiasts, fostering a space for sharing knowledge and innovations. <a href="https://pydatakrk.pl">pydatakrk.pl</a>
<b>CocoaHeads Krakow</b>	The Krakow Mac and iOS specialists community inspires innovation and collaboration among Apple technology enthusiasts. They provide a hub for exchanging the latest trends and networking. <a href="https://meetup.com/pl-PL/cocoaheads-krakow/">meetup.com/pl-PL/cocoaheads-krakow/</a>
<b>Data Community Krakow</b>	The Krakow branch of the Data Community brings together professionals focused on Microsoft's data platform, fostering a network for sharing expertise and innovations in the field. <a href="https://datacommunity.pl/tag/krakow/">datacommunity.pl/tag/krakow/</a>
<b>Hackerspace</b>	A creative playground and meeting hub for IT enthusiasts, offering a space where great ideas meet the tools and community needed to bring them to life. <a href="https://hackerspace-krk.pl/">hackerspace-krk.pl/</a>
<b>Krakow Cloud Native Group</b>	The community, focused on modern cloud tooling and building cloud-native applications, that organizes regular meetups for enthusiasts to share and explore the latest in cloud technologies. <a href="https://meetup.com/pl-PL/krakow-cloud-native/">meetup.com/pl-PL/krakow-cloud-native/</a>



## Women in tech

<b>Women in Technology</b>	A community of women united by a passion for IT and new technologies, for both experts and those looking to develop their skills, creating a supportive space that encourages knowledge exchange and growth. <a href="http://womenintechnology.pl">womenintechnology.pl</a>
<b>Women Techstyle Krakow</b>	The community connects IT professionals with leading global tech voices and innovative companies. They organize the Women TechStyle Summit, one of Poland's largest IT conferences for women. <a href="http://womentechstyle.pl">womentechstyle.pl</a>
<b>Try IT</b>	The foundation aims to empower women to enter the IT industry and encourage them to pursue education in the field. It builds a community supporting women in starting their education and professional careers. <a href="https://linkedin.com/company/fundacja-try-it/">linkedin.com/company/fundacja-try-it/</a>
<b>Girls Go IT</b>	A community built around a free course by AGH University of Science and Technology and Try IT Foundation aims to equip women with tools and skills for a career in technology, promoting their rise as valued experts in the tech sector. <a href="http://szkolenia.informatyka.agh.edu.pl/oferta/girlsgoit/">szkolenia.informatyka.agh.edu.pl/oferta/girlsgoit/</a>
<b>Mamo Pracuj w IT</b>	This community dispels myths that IT is not for women, offering guidance on entering the industry, finding jobs, and showcasing IT as an inclusive, rewarding field for women, especially moms after a maternity break. <a href="http://mamopracuj.pl/mamo-pracuj-w-it/">mamopracuj.pl/mamo-pracuj-w-it/</a>

## Quality Assurance & Technical Communication

<b>KRAQA</b>	Connects Krakow software quality enthusiasts, from testers to QA professionals, offering a platform for learning, networking, and creativity through regular educational and social events. <a href="http://kraqa.pl">kraqa.pl</a>
<b>TechWriter.pl</b>	The community is a group of professionals passionate about creating, distributing, and managing technical documentation. Members range from humanities to engineering graduates. <a href="http://techwriter.pl">techwriter.pl</a>

# Tech events

Krakow's well-established tech ecosystem is supported by a vibrant calendar of events that includes conferences, job fairs, and community meetups. These gatherings provide space for knowledge exchange, professional development, and brand visibility, bringing together talent, companies, and innovators from across the region.

## A key location for IT industry events

As one of Poland's leading tech hubs, Krakow regularly hosts major industry events. Each year, the city welcomes 10+ large-scale tech conferences, drawing a combined audience of approximately 10 000 participants. Alongside these, hundreds of smaller events - from specialized meetups to expert tech talks - take place throughout the year, offering frequent opportunities to connect and share insights.

Krakow's strength as an event host lies in the combination of a mature IT environment and a wide range of event infrastructure. This makes the city a natural destination for industry professionals looking to engage with the tech community.

## Venues for conferences and job fairs

The city offers a broad selection of venues that support events of varying scale and format. These include large, modern facilities such as Tauron Arena Krakow, Expo Krakow, and the ICE Krakow Congress Centre, as well as versatile locations like the Manggha Museum and CKF\_13 Centrum Konferencyjne Fabryczna.

Name & Occurrence	Description
<b>Mobile Trends Conference</b>  Paid entry Once a year in March	The event connects experts and enthusiasts of mobile technology, offering knowledge about creating and implementing apps. It is for both beginners and pioneers, promoting collaboration and knowledge sharing. It presents case studies, trends, and tips from market leaders. <a href="http://mobiletrends.pl">mobiletrends.pl</a>
<b>SFI Academic IT Festival</b>  Free entry Once a year in April	An annual international conference organized by students, welcoming IT enthusiasts from all professions. Attendees have the opportunity to listen to speakers, participate in practical workshops, and expand their skills in a diverse range of IT topics. <a href="https://facebook.com/sfikrakow">facebook.com/sfikrakow</a>
<b>Hacknarök</b>  Free entry Once a year in April	An original hackathon event where participants embark on a 24-hour journey through the worlds of Norse mythology, where battles are fought with code lines written by participating teams. <a href="http://hacknarok.eestec.pl">hacknarok.eestec.pl</a>
<b>Lambda Days</b>  Paid entry Once a year in May	A conference on functional programming, covering Scala, Erlang, Haskell, F#, and Elixir languages. It is suited for IT professionals, software developers, ICT students, and functional programming enthusiasts. The two-day event features around 40 experts across six tracks. <a href="http://lambdadays.org">lambdadays.org</a>

<p><b>Confidence</b></p> <p>Paid entry Once a year in May</p>	<p>One of the leading European IT security conferences. IT professionals, security experts, and developers can anticipate in-depth discussions and learning opportunities about the latest trends in cybersecurity technologies.</p> <p><a href="http://confidence-conference.org">confidence-conference.org</a></p>
<p><b>Code Europe</b></p> <p>Paid entry Once a year in June</p>	<p>One of the largest coding conferences in Poland for software developers, architects, DevOps Engineers, Security Experts, Product Owners, and more. It offers an array of workshops, lectures, and presentations on the up-to-date trends in coding and software development.</p> <p><a href="http://codeeurope.pl">codeeurope.pl</a></p>
<p><b>ACE</b></p> <p>Paid entry Once a year in June</p>	<p>The largest IT and Agile community regional conference, highlighting lean thinking, Agile methodologies, and management innovations. Attendees engage with international experts in interactive sessions across process and product paths.</p> <p><a href="http://aceconf.com/home">aceconf.com/home</a></p>
<p><b>Devoxx Poland</b></p> <p>Paid entry Once a year in June</p>	<p>This conference for developers and IT professionals hosts international speakers and covers the latest technologies and methodologies in software development in Java, Android, cloud, Big Data, artificial intelligence, robotics, programming languages, and more.</p> <p><a href="http://devoxx.pl">devoxx.pl</a></p>
<p><b>HackYeah</b></p> <p>Paid entry Once a year in September</p>	<p>The largest stationary hackathon in Europe. During the event participants come together to tackle tasks from the event's partners and work on open challenges in the field of cybersecurity and others.</p> <p><a href="http://hackyeah.pl">hackyeah.pl</a></p>
<p><b>Test Dive</b></p> <p>Paid entry Once a year in October</p>	<p>A highly regarded event where Testing industry specialists gather to learn, network, and stay up-to-date with the latest trends. The conference features a diverse range of talks delivered by leading experts in the field of IT testing.</p> <p><a href="http://testdive.pl">testdive.pl</a></p>
<p><b>TECH-ON!</b></p> <p>Paid entry Once a year</p>	<p>TECH-ON! is designed as a flagship ecosystem event positioning Krakow as a growing European tech and innovation hub, with strong emphasis on networking and cross-sector collaboration.</p> <p><a href="http://techon.krakow.pl/">techon.krakow.pl/</a></p>



# Focus

## TECH-ON!

TECH-ON! is an annual technology event developed as a platform connecting start-ups, investors, technology companies, research institutions, and public sector stakeholders within the Krakow and Malopolska innovation ecosystem.

The first edition, held in 2025 at the ICE Krakow Congress Centre and co-organised by the City of Krakow, the Malopolska Region and the Krakow Festival Office, brought together over 1 500 participants and almost 100 speakers, confirming its role as a growing meeting point for the technology community. The initiative is being developed to expand its international reach, strengthen connections between start-ups and investors, and increase Krakow's visibility as a European location for technology business, R&D and innovation.

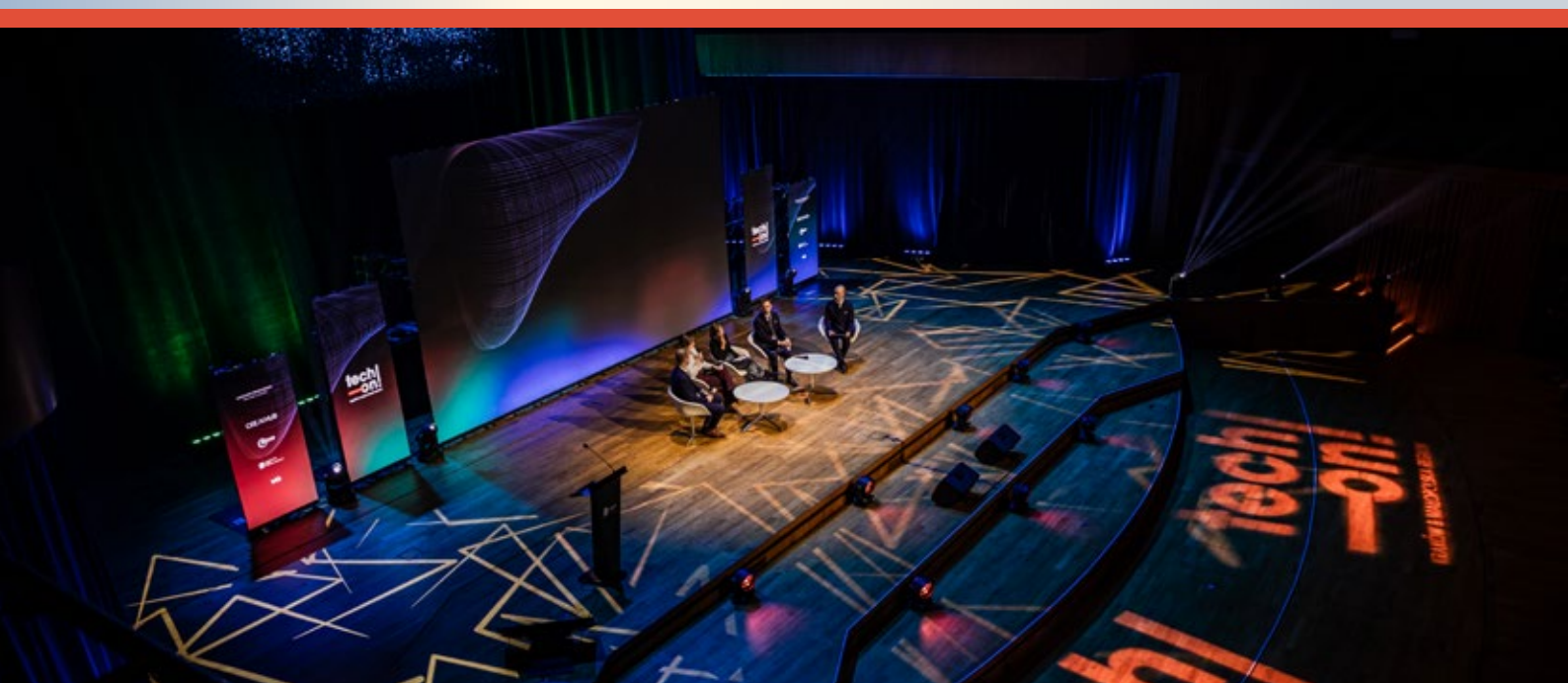
TECH-ON!'s ([techon.krakow.pl](https://techon.krakow.pl)) next edition is scheduled for 13 October 2026 at ICE Krakow. The format combines conference sessions with an expo zone, start-up pitching and structured networking, creating a multi-layered experience for participants across sectors. It is also evolving beyond a conference into a broader tech platform and citywide experience, engaging research centres, laboratories, production

facilities, technology companies and the creative industries, and showcasing how cross-disciplinary innovation is developed and implemented.

The programme is structured around key thematic paths, including AI (AI Hub and AI Dev), Space & Security, Life Science and MedTech, as well as Future City Innovation, focusing on the application of advanced technologies to urban systems and infrastructure. By bringing together founders, engineers, researchers and decision-makers, TECH-ON! enables collaboration beyond sectoral silos, supporting knowledge exchange, commercialisation and implementation.

From an ecosystem perspective, the conference strengthens Krakow's and Malopolska's position as a competitive European location for R&D, technology business and investment. It supports investor matchmaking, start-up exposure and access to partners, enabling both B2B and B2G cooperation, while presenting regional capabilities across key sectors within a future-oriented framework.

This perspective is linked to the role of technology in shaping cities and societies. Solutions emerging from the ecosystem contribute to building more resilient, secure and sustainable environments, with residents as both beneficiaries and co-creators of long-term social and technological change.





# Adrian Legutko

Head of Open Innovation  
at Proidea



Large-scale hackathons have evolved from massive coding marathons into interdisciplinary “problem labs.” These high-volume events redefine the regional scene by bridging the gap between public administration, global corporations, and thousands of developers. In Poland’s booming ICT sector, this scale is essential for testing complex innovations like AI and Cybersecurity under extreme pressure.

The 24/48h formula provides a “live” verification of skills that a CV cannot capture. Beyond coding, participants gain “Product-Minded Engineering” traits: rapid prototyping, decisive thinking, and team communication. This creates a workforce that is not just academically prepared but prepared for real-world business demands. Effectiveness is highest where scale meets public administration or corporate R&D. In Poland, hackathon-driven initiatives connected to the Ministry of Finance demonstrated how rapid prototyping and data collaboration can support fraud detection and operational efficiency. A standout success is Bards.ai, a team that leveraged multiple major hackathon victories to build a fast-growing AI company now serving commercial clients.

A hackathon is a “spark,” not a full incubator. It validates the team, technology, and market reaction. Airly is a landmark example, having emerged from a hackathon to become a global leader in air quality monitoring. While a startup is not “built in 24h,” the MVP and team energy created often lead directly to VC funding or professional acceleration.

Partnerships have shifted from simple recruitment to Open Innovation. Today, partners bring real, complex business problems to the table. They seek a rapid external innovation model, valuing the ability to stress-test dozens of different approaches to a single challenge in one weekend rather than just collecting resumes.

A robust, large-scale hackathon culture solidifies Poland’s position as one of the leading digital ecosystems in CEE. It signals that the country is no longer just an IT service provider but a center of rapid innovation, providing a significant strategic edge over regional neighbor.

## Job fairs in Krakow

A list of the most significant job fairs and career days organized in Krakow throughout the year. These events are opportunities for businesses to showcase their brand, and meet potential candidates face-to-face.

Name & Occurrence	Description
<b>AGH Career Days</b> Free entry Once a year in March	An annual job fair organized by the leading technology university in Krakow, aimed at connecting students and graduates with IT companies. Emphasizes the fields of science and technology with a focus on innovation and start-ups, gathering around 100 companies each year. <a href="http://targi.agh.edu.pl">targi.agh.edu.pl</a>
<b>Jobicon</b> Free entry Once a year in March	A job fair organized by Pracuj Group that gathers companies from various sectors, including IT. The event is joined by almost 100 exhibitors. During the event, participants can attend various lectures and workshops. <a href="http://jobicon.pracuj.pl/krakow">jobicon.pracuj.pl/krakow</a>
<b>Jagiellonian University Job Fair</b> Free entry Twice a year in April and October	This event is a 3-day job fair providing the space for students and graduates of the university to interact with potential employers across various industries. The fair also includes seminars and workshops. <a href="http://targipracy.uj.edu.pl">targipracy.uj.edu.pl</a>
<b>The Cracow University of Economics Job Fair</b> Free entry Twice a year in March and October	A job fair focused on business and economics sectors with many of the top-tier companies in the finance, business, and economics sectors offering seminars and workshops on skills needed in the modern economy, and networking opportunities. <a href="http://kariery.uek.krakow.pl">kariery.uek.krakow.pl</a>
<b>Engineering Job Fair Politechnika Krakowska</b> Free entry Once a year in October	A job fair targeting engineering students and graduates from the Krakow University of Technology, presenting opportunities in related fields. With a strong focus on engineering and technology companies, the event gathers over 30 companies each year. <a href="http://targi.pk.edu.pl">targi.pk.edu.pl</a>
<b>Talent Days</b> Free entry Twice a year in May and October	One of the largest career fairs in Poland. It serves as a meeting point for companies, startups, and young professionals. This job fair hosts hundreds of companies from all sectors and offers free career counseling, workshops, and CV consultations. <a href="http://talentdays.pl/fairs/krakow">talentdays.pl/fairs/krakow</a>



# Office space in Krakow

In collaboration with CBRE

## Office market

Krakow offers a broad and continuously evolving portfolio of office space options tailored to the needs of organizations of all sizes. Whether companies are looking for spacious corporate environments capable of accommodating large teams or more intimate settings that support creativity and collaboration, the city provides a wide range of possibilities. In this section, we explore the local office market, outlining the available leasing options and their associated costs.

Despite the ongoing changes shaping the market, Krakow remains one of the most attractive business locations, offering both modern A-class office buildings and distinctive spaces situated in revitalized post-industrial properties. This combination of functionality and character continues to draw a diverse mix of tenants with varying requirements.

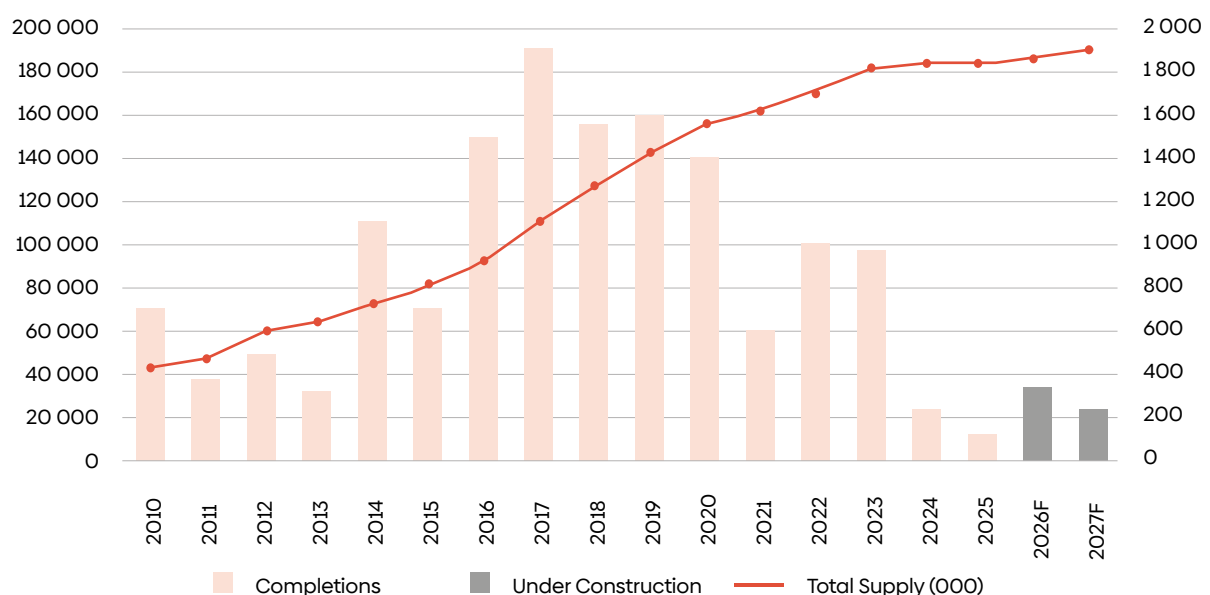
# 1.8<sub>MLN</sub> m<sup>2</sup>

Space surface in Krakow

# 12<sub>K</sub> m<sup>2</sup>

Office space completed in 2025 & Q1 2026

### Office stock evolution in Krakow (in m<sup>2</sup>)



Source: CBRE, 2026

# Office locations

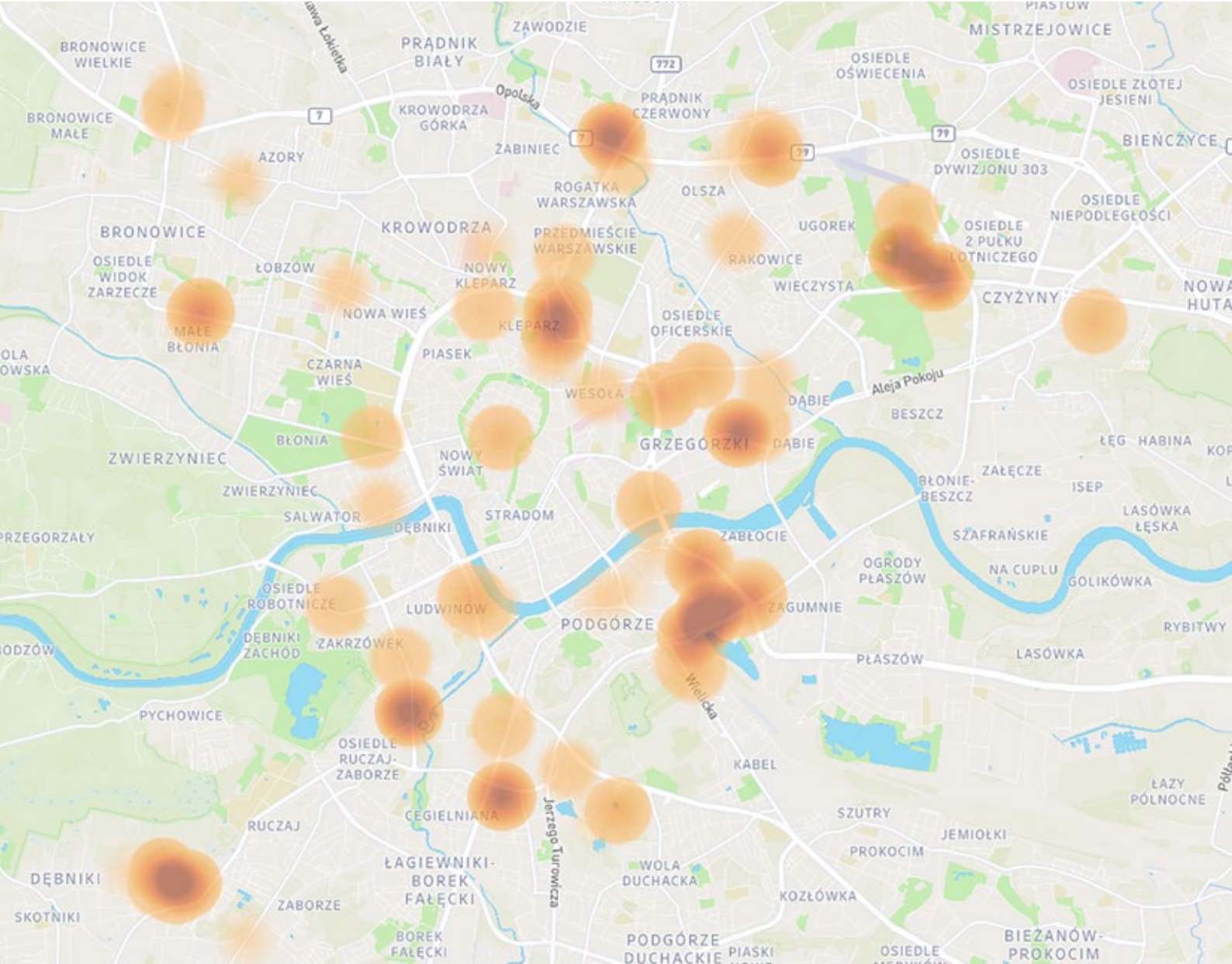
The Krakow IT Market Map highlights the office locations of the 100 largest companies employing IT specialists in the city, with team sizes ranging from approximately 60 to over 2 000 professionals. A clear spatial pattern emerges: technology companies in Krakow consistently gravitate toward areas offering well-developed business infrastructure, strong public transport connectivity, and proximity to the city center.

Rather than concentrating in a single, clearly defined tech district, Krakow has evolved into a network of interconnected office clusters. The most prominent of these are located in and around the city center, as well as in the southern and western parts of the city, where modern office stock has expanded rapidly over the past decade.

The most established office complexes include High Five (58 000 m<sup>2</sup>) and Fabryczna Office Park (42 000 m<sup>2</sup>). These developments represent some of the most significant concentrations of modern offices. Krakow's IT sector has developed organically across multiple locations, with the largest concentration of offices in the Main Station area, Zablocie, and Grzegorzki district.

Source: Dataset by MOTIFE Insights, CBRE 2026

## Heatmap of Krakow's 100 largest IT employers offices



# Long-term lease

We are increasingly observing a market moving at two different speeds, particularly in terms of rental dynamics and vacancy levels. At the same time, the market continues to experience historically low development activity – a trend most evident in central locations, where available space remains scarce despite consistently strong tenant demand.

The most sought-after areas, although associated with higher rental rates, maintain the lowest vacancy levels. Meanwhile, districts with less established appeal must compete far more assertively for tenants, often relying on greater flexibility or more aggressive commercial strategies to attract new occupiers.

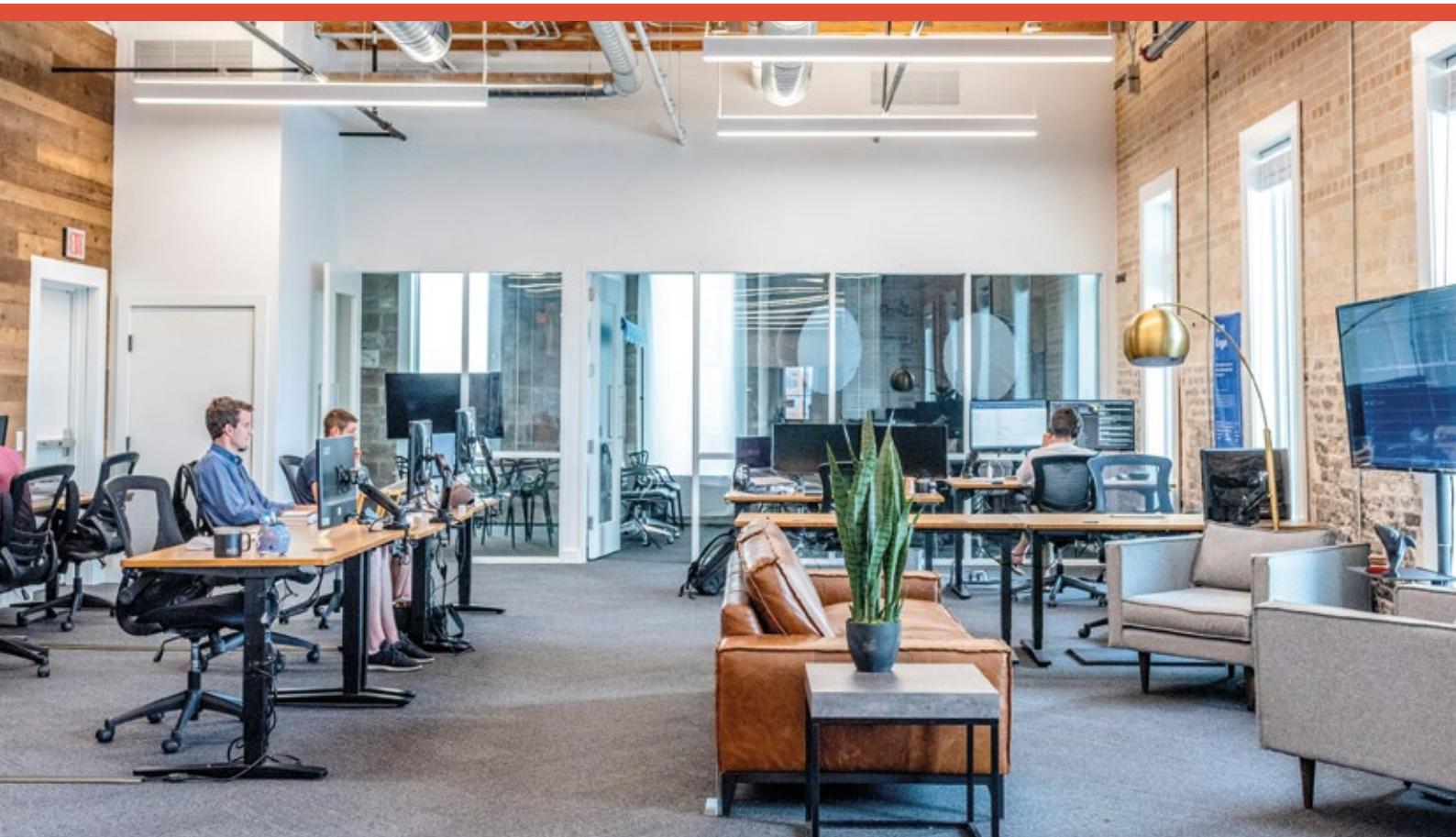
**17.5-19.5**  
**EUR**

Average lease rent per 1 m<sup>2</sup>  
of office space/month  
in **prime locations**

**13.5-15.5**  
**EUR**

Average lease rent per 1 m<sup>2</sup>  
of office space/month  
in **secondary locations**

Source: CBRE, 2026



# CBRE

## Rafał Oprocha

Director, Head of Krakow Office at CBRE



Krakow office market, consistently Poland's largest regional market, enters a phase of fascinating transformation. We are witnessing a situation where historic highs in occupier activity are clashing with an unprecedented slowdown in new supply.

In 2025, Krakow continued to be dominated by tenants from the Business Services Sector (BSS) and IT. The city's thriving tech sector, with its startups and established international players, is a significant driver of office space absorption. Krakow has seen record-breaking activity. In 2025, demand reached approximately 270 000 sqm, a 2% increase year-on-year and a 26% increase compared to 2023. Notably, the market is driven by renegotiations, which accounted for 63% of all transactions in 2025.

2025 brought a historically low number of new projects. Only about 12 000 sqm of new space was delivered, representing a drastic drop compared to previous years. Total modern office stock in the city has reached approximately 1.85 million sqm. The vacancy rate is steadily declining, hitting 18.4% by the end of 2025. However, there is a massive divide: in City Center and semi-central locations, the rate is only 5.8–10.5%, while in non-central zones it exceeds 20%. The most successful locations, despite higher rents, have the lowest vacancy rates, while less attractive districts are forced to compete aggressively for tenants.

### Krakow office market trends

Tenants increasingly favor the city center for its prestige and accessibility, putting upward pressure on rents in prime assets. Buildings failing to meet modern energy-efficiency standards are losing appeal. Prime rents oscillate between EUR 17–19.50/sqm/month, alongside rising service charges.

### Outlook for 2026 and 2027

The short-term forecast points to a gradual recovery in supply, coupled with continued cost discipline. While 2025 was a “dry” year, approximately 60 000 sqm remains under construction. We expect about 36 000 sqm to hit the market in 2026 and 24 000 sqm in 2027. Low availability of modern office space in the center and rising construction costs will exert upward pressure on nominal rents in flagship projects. Companies will aim to optimize their footprints (often reducing size in favor of higher quality), focusing on hybrid models.

Krakow office market is currently a “two-speed” market. Success belongs to owners of central, green buildings, while older projects on the outskirts will have to compete through flexibility and tenant incentives.

# CBRE

## Konrad Szaruga

Director, Head of Flexible Workplace at CBRE



### Flexible office sector

In conditions of limited new supply and growing demand for fast and operationally predictable solutions, the flex sector in 2025 acted in Krakow as a bridge between corporate needs and the realities of the conventional office market. At the same time, demand dynamics were shaped by clear user trends consistent with CBRE's global insights: the office has once again become a destination for collaboration and community building.

The most common reasons employees come to the office – collaboration (68%) and in-person meetings (58%) – drove demand for collaboration modules, high-quality meeting suites and well-designed team zones\*. Flex operators are able to implement this model the fastest and most efficiently.

Throughout 2025, tenant preferences favored hybrid layouts: an increased number of collaboration areas, strong demand for enclosed rooms and quiet focus spaces, and the

“destination office” approach, combining portfolio efficiency with a positive employee experience. At the same time, macro trends confirmed that Poland remains an attractive destination for newcomers – especially companies seeking highly skilled professionals in technology, finance and engineering – which further strengthened demand for flexible workspace models.

The flexible office sector continues to act as a litmus test for the traditional office market – this is where market shifts appear first. In Krakow, a two-speed market has been visible for years, and in 2025 this polarization deepened, with an even stronger divide expected in 2026.

Location and transport accessibility have become the key drivers of this split. In central locations, flex office rates rose sharply – in some cases exceeding average levels observed in Warsaw. Clients actively compete for the best addresses, often joining waiting lists for space in locations such as Fabryczna Flex, Business Link, Shuffle and Mogilska. In these buildings, demand significantly exceeds supply, resulting in very high occupancy levels and stable operator revenues.

At the same time, pressure is growing on local operators who, despite long market presence, are losing competitiveness if they fail to invest in service quality and client relationships. The year 2025 clearly demonstrated that even in conditions of high demand and good location, operational quality and a partnership driven model of cooperation are critical to maintaining market position. The market increasingly rewards operators with strong operational standards, transparent collaboration policies and fast responsiveness to tenant needs.

In 2026, flexible workspace will remain a natural and strategic complement to traditional leases. It will play a particularly important role in reducing the risks associated with costly fit-outs, as well as enabling rapid organizational changes and portfolio restructuring – making it a key tool for ensuring agility and continuous adaptation.

\*Source: CBRE Workplace & Occupancy Benchmarking Program, 2026.

9<sub>K</sub>

Workstations in Krakow flex office space, 5% growth within the last 12 months

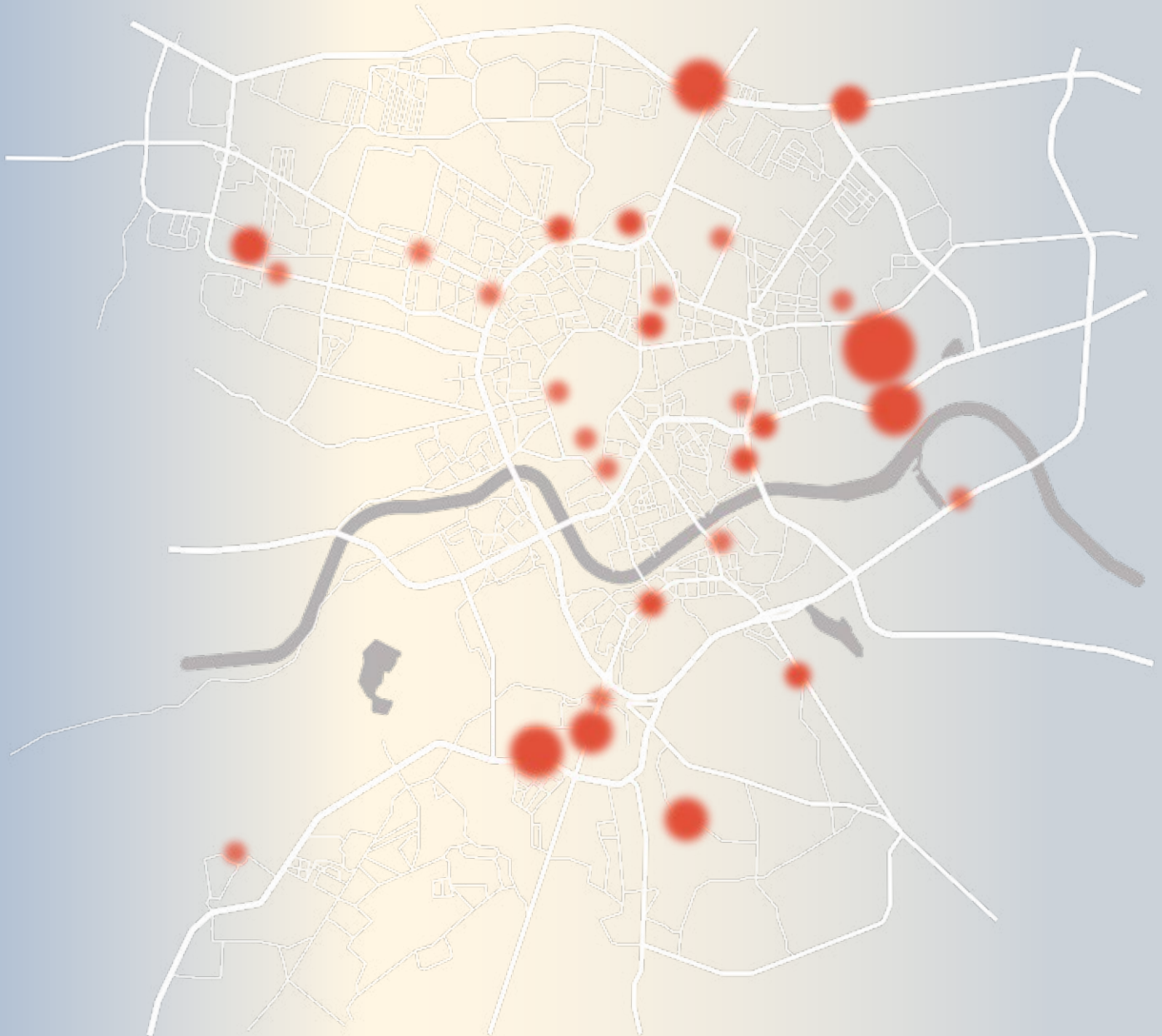
300-600<sub>EUR</sub>

The price range for a desk in a serviced office in Krakow (workstation per month)





## Selected coworking and serviced offices operators in Krakow

Capacity [sqm GLA]



 > 2000 m2

 1000-2000 m2

 < 1000 m2



## Focus

# Trends in the Krakow office market

Krakow remains firmly established as Poland's most advanced and mature office market, offering an extensive selection of leasing opportunities tailored to diverse location requirements, workplace standards, and space configurations. The city continues to support companies across a broad spectrum of industries and scales, further strengthening its role as a major hub for business activity.

### Office space stock

In 2025, Krakow's office market experienced one of the lowest levels of new supply in its recent history. Only 12 000 sqm of new office space was delivered throughout the year, accounting for approximately 60% of all office completions across Poland's regional cities. This reflects the exceptionally limited development activity nationwide, driven by high construction costs, tighter financing conditions, and sustained uncertainty around long-term office demand.

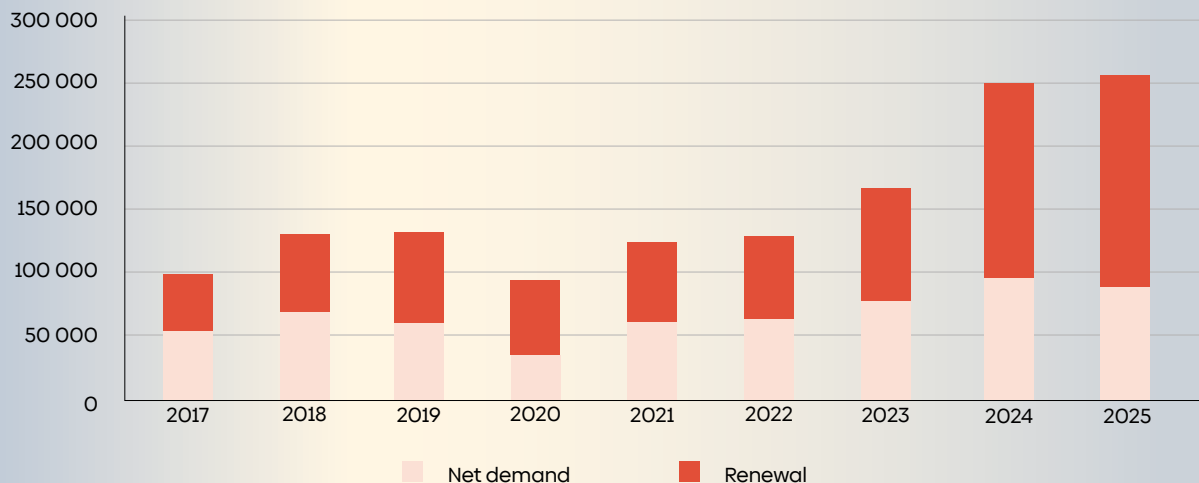
Hybrid work models continued to influence tenant strategies in 2025, contributing to elevated vacancy levels and reducing developers' willingness to initiate new projects. Although the subdued pipeline highlights ongoing market challenges, the very limited influx of new space is expected to support a more stable absorption of existing stock going into 2026.

### Demand for office space

In 2025, Krakow's office market continued to show solid demand fundamentals, with total tenant activity reaching 270 000 sqm, slightly surpassing the already elevated levels of recent years. However, new lease agreements accounted for only 31% of overall take-up, reflecting more cautious expansion strategies and a market dominated by lease renegotiations.

Although many companies continued to reduce the size of their leased areas, this shift was primarily driven by a focus on higher-quality buildings and modern, efficient workspace layouts – trends particularly visible among international corporations. The IT sector remained the strongest demand driver, responsible for 26% of total leasing activity in 2025. At the same time, the manufacturing sector continued to strengthen its presence in the market, increasingly contributing to leasing volumes. Together, these sectors played a key role in shaping occupier demand in 2025.

### Demand for office space by transaction type (in m<sup>2</sup>) in Krakow office market

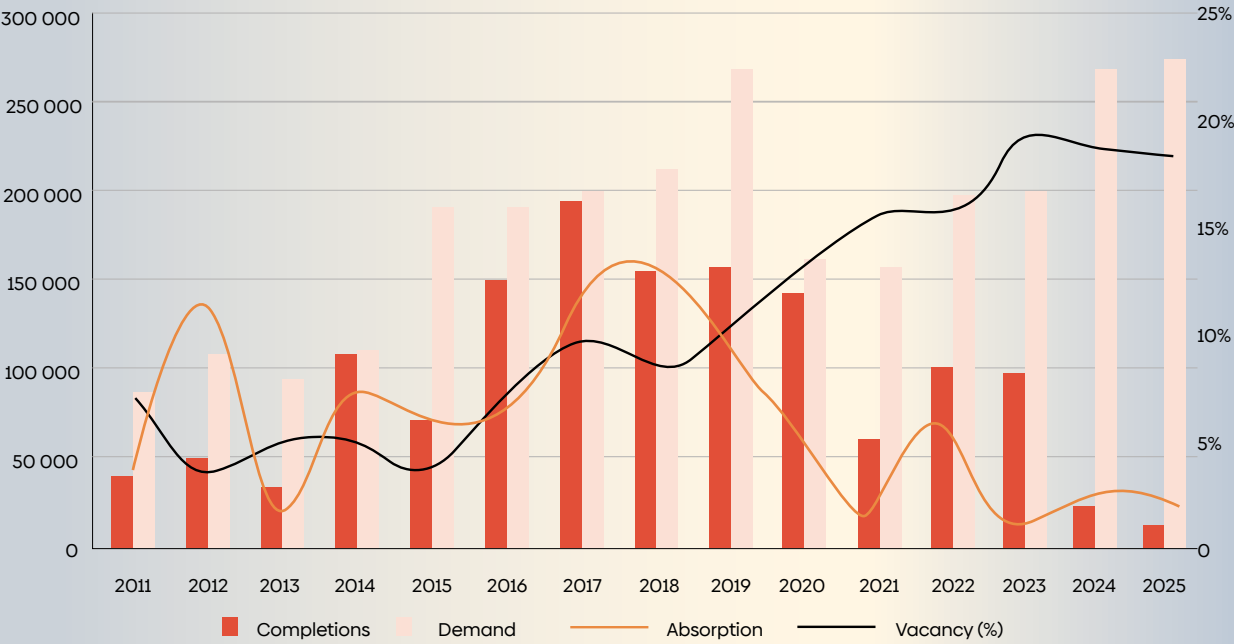


Source: CBRE, 2026

### Availability of office space

We are beginning to see early signs of a modest decline in Krakow's vacancy rate, which may indicate improving absorption levels. Although developer activity in the city's central zones remains constrained – a situation likely to limit the availability of new office space over the next one to two years – this environment is expected to gradually support stronger absorption. At present, the citywide vacancy rate is approximately 18%, with substantial variation between central and non-central submarkets. While core areas continue to record very tight vacancy levels, outlying districts are experiencing significantly higher rates.

### Main market indicators in Krakow: Vacancy rate (in %), demand, absorption, and annual supply (in m<sup>2</sup>) in Krakow office market



Source: CBRE, 2026

### Lease costs

Krakow's two-tier market structure is clearly reflected in the rental gap between central and non-central locations. Prime, centrally located new buildings achieve premium rents that now exceed €19 per sqm in existing stock. In contrast, areas with weaker demand and higher vacancy levels offer tenants considerably more room for negotiation, resulting in more competitive leasing conditions.

### Flexible office space

As companies continue to prioritize cost optimization and greater workplace agility, demand for flexible office solutions in Krakow's dynamic business environment remains on an upward trajectory. Flex providers are particularly well-positioned to support these evolving tenant requirements, offering space that adapts quickly to changing organizational needs.

Chapter 2

# Hiring in Poland



This chapter is specifically targeted to HR teams and HR Executives. Topics covered include: talent pool, salaries, labor law, local customs, and latest trends.

# IT talent pool in Poland

## 430<sub>K</sub>

Engineers and IT professionals in Poland

Poland's IT workforce, characterized by strong education, English proficiency, and experience in global environments, now totals approximately 430 000 engineers and technology professionals, continuing to draw the attention of international companies seeking to scale their operations.

## 19.5<sub>K</sub>

Computer Science students graduating yearly in Poland

The country's largest concentrations of IT talent are found in Krakow, Warsaw, and Wroclaw, each serving a distinct role. Warsaw remains the primary destination for companies establishing subsidiaries focused on the domestic market. Krakow stands out for its strength in software engineering and IT delivery centers, while Wroclaw is particularly attractive for organizations from the DACH region.

Over the past 5 years, Poland's IT talent pool has expanded by 46%, supported by a robust academic ecosystem. Each year, almost 20 000 graduates in computer science enter the market, sustaining a consistent pipeline of qualified professionals and reinforcing Poland's position as a key source of digital talent.

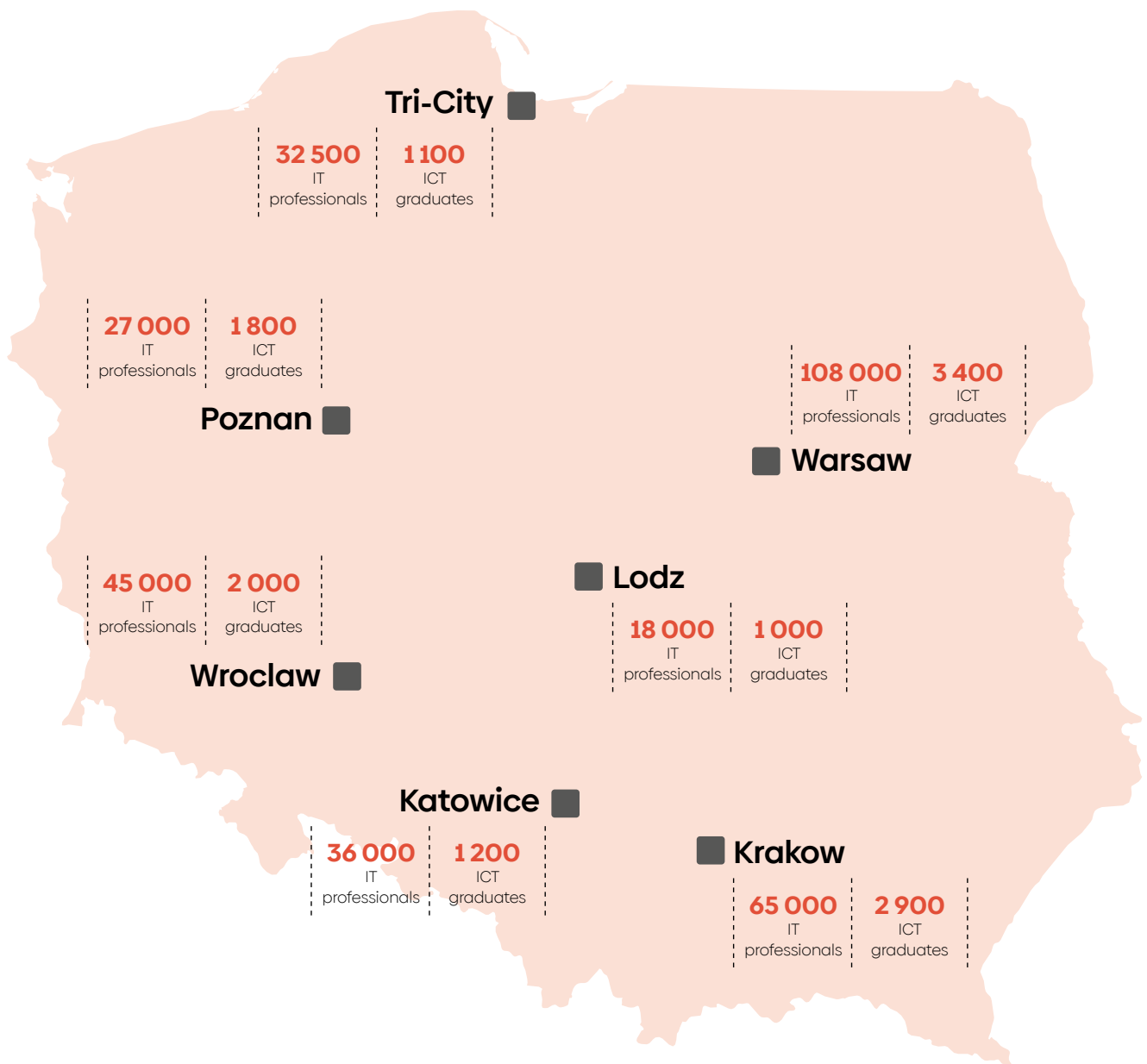
At the same time, international migration, particularly from Ukraine, has further strengthened the talent base. Many foreign professionals are attracted by Poland's quality of life, stable labor market, and opportunities to work within international organizations, contributing to the continued expansion and diversification of the workforce.

Source: MOTIFE Insights 2026, stat.gov.pl 2026

# IT talent pool key figures

Poland's IT talent is centered in 7 major cities where over 70% of country's IT professionals work. Each city has a unique vibe, its advantages, and a value proposition for investors. There are also some contenders that aspire to the 1st league such as Rzeszow, Lublin, Szczecin and Bydgoszcz.

## Estimated IT talent pool and annual ICT graduates per main city in Poland



Source: stat.gov.pl, MOTIFE Insights 2026.



# Jadwiga Cechnicka

Senior Human Resources Manager  
at Tanium



Poland, and Krakow in particular, has become one of the strongest IT talent hubs in Europe. The depth and maturity of the local talent pool were key factors behind Tanium's decision to establish its presence in this location.

Krakow offers a rare combination of advanced technical competencies and strong exposure to international business. This is further strengthened by Krakow's leading technical universities, which consistently educate large numbers of graduates in computer science, engineering, and related disciplines, ensuring a steady and scalable supply of skilled talent across seniority levels.

Tanium's journey in Krakow began in December 2023 and as anticipated, after 2 years, the Centre of Excellence is now approaching the milestone of 100 people on board. What started with a Global Technical Support team, has evolved into a dynamic, increasingly diverse

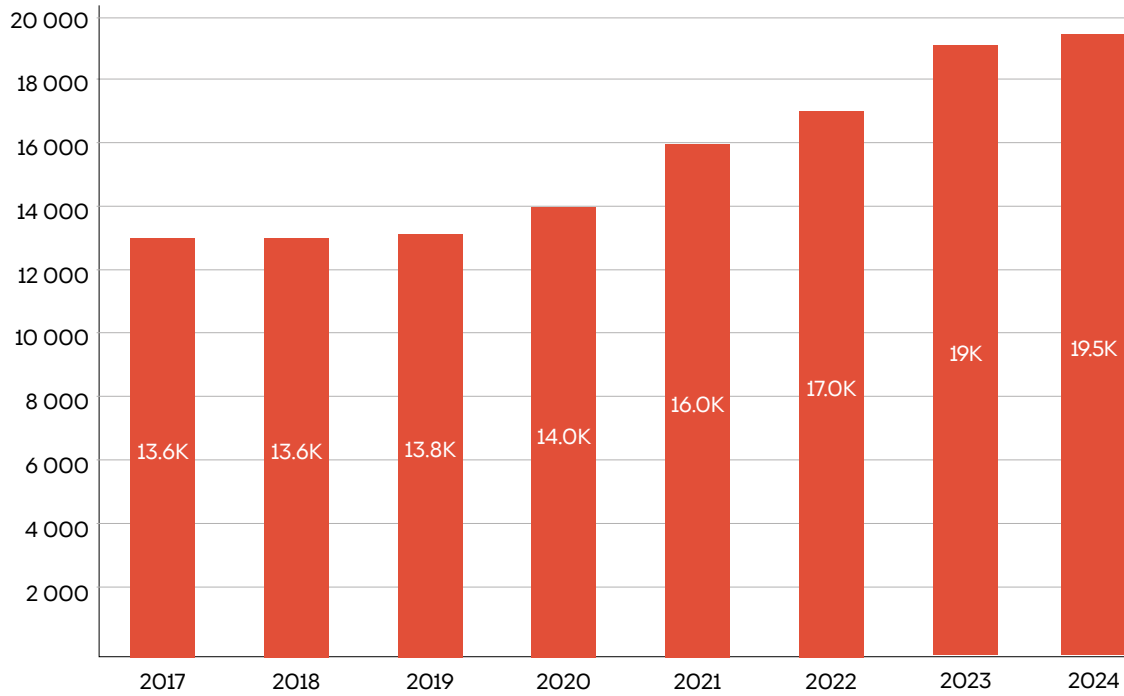
organization. Today, Tanium's Krakow office hosts a growing technology team with world class quality assurance capabilities, as well as a strong general administration function. What I truly value about our Krakow office is how seamlessly it fits into Tanium's long-term vision. As Tanium rapidly expands and supports organizations of all sizes, Krakow plays a key role in helping the company to scale. With a strong technology base, excellent universities, and an exceptional team spirit, Tanium is building capabilities here that will support hundreds of customers globally.

Many of the world's leading organizations trust Tanium's single, unified platform for endpoint management and security to innovate faster, stay resilient and move business forward with confidence, at scale.

The company is recognized as a Leader in the inaugural 2026 Gartner® Magic Quadrant™ for Endpoint Management Tools and as a Leader in the IDC MarketScape: Worldwide Client Endpoint Management Software for Windows Device Management 2025–2026 Vendor Assessment.

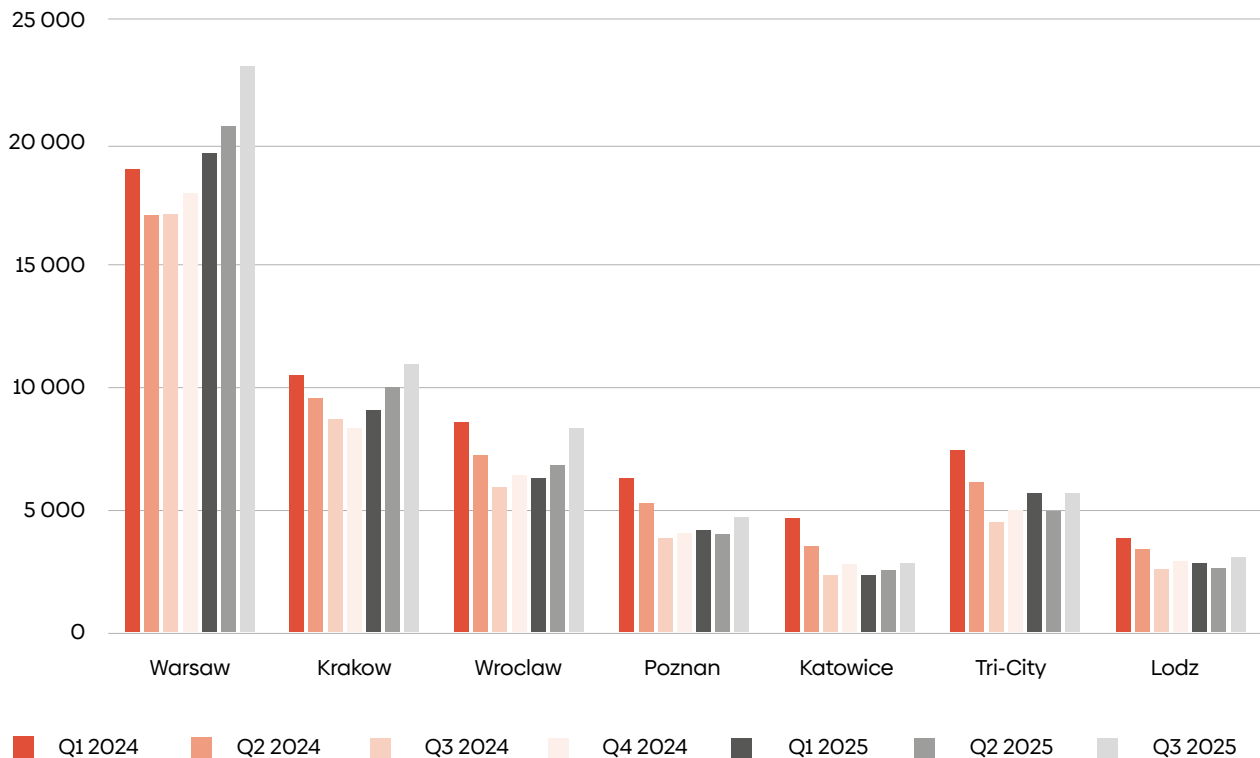
During the academic year 2023-2024, over 19 500 Information and Communication Technologies (ICT) students earned their degrees from Polish universities. Poland continues to produce a steady pipeline of technical talent, and hiring demand remains concentrated in major hubs. This dynamic reinforces the importance of location strategy and access to experienced talent when scaling teams in Poland.

## Number of ICT graduates in Polish universities, 2017-2024



Source: stat.gov.pl

## Number of IT job ads per main city in Poland, Q1 2024-Q3 2025



Source: Inhire, Market Snapshot Q1 2024 - Q1 2025

## Focus

# Hiring global leadership roles in Poland

This section outlines the availability and structure of senior IT leadership in Poland, supporting decision-makers evaluating the market for executive and strategic technology hires.

### Poland as a destination for global decision-making roles

The nature of work delivered from Poland has shifted, with companies assigning more advanced and strategic roles to Polish teams as the local talent pool gains experience and specialized skills. At the same time, lower-level and entry-level roles are increasingly being moved to more cost-competitive locations.

As the talent pool matures, companies such as IBM, Sabre, and Assa Abloy and TripAdvisor entrust Polish leaders with ownership of large, distributed international teams, reinforcing Poland's position as a mature technology hub.

### Senior technology leadership in Poland: scale, international experience, and market maturity

Poland offers a growing pool of over 20 000 people in technology leadership roles including Engineering Managers and Senior Managers. Director-level roles or above, including

Engineering Directors, VPs, and CTOs account for approximately 2% of the total IT talent base. While limited in scale, this group forms the critical leadership layer for organizations managing complex, global technology functions.

This leadership capacity has been largely shaped within multinational environments, where approximately 84% of IT professionals are employed by foreign-owned companies, resulting in leaders who are well-versed in distributed operating models, cross-border team management, and global standards.

At the same time, a new wave of technology executives is emerging from professionals who entered the IT market in the early 2000s, when Poland's modern technology sector was effectively taking shape alongside the inflow of international organizations. They combine strong technical foundations with experience in scaling teams and transitioning from outsourcing models to product ownership, playing a pivotal role in Poland's evolution toward end-to-end technology ownership.

### Gender diversity

Poland stands out globally for its share of women in leadership roles. According to data from LinkedIn Economic Graph, in 2025 Poland was one of the few countries to record an increase in women's representation in leadership (+0.2 pp), while in most surveyed countries the trend either stalled or reversed.

Poland ranks among the leading EU countries in terms of women pursuing STEM education, with women accounting for 39% of STEM graduates, the sixth-highest share in the European Union.

20<sub>K</sub>

Tech leadership talent pool

2%

Of the IT talent pool in director level roles or above

# Salaries and benefits

## Salaries

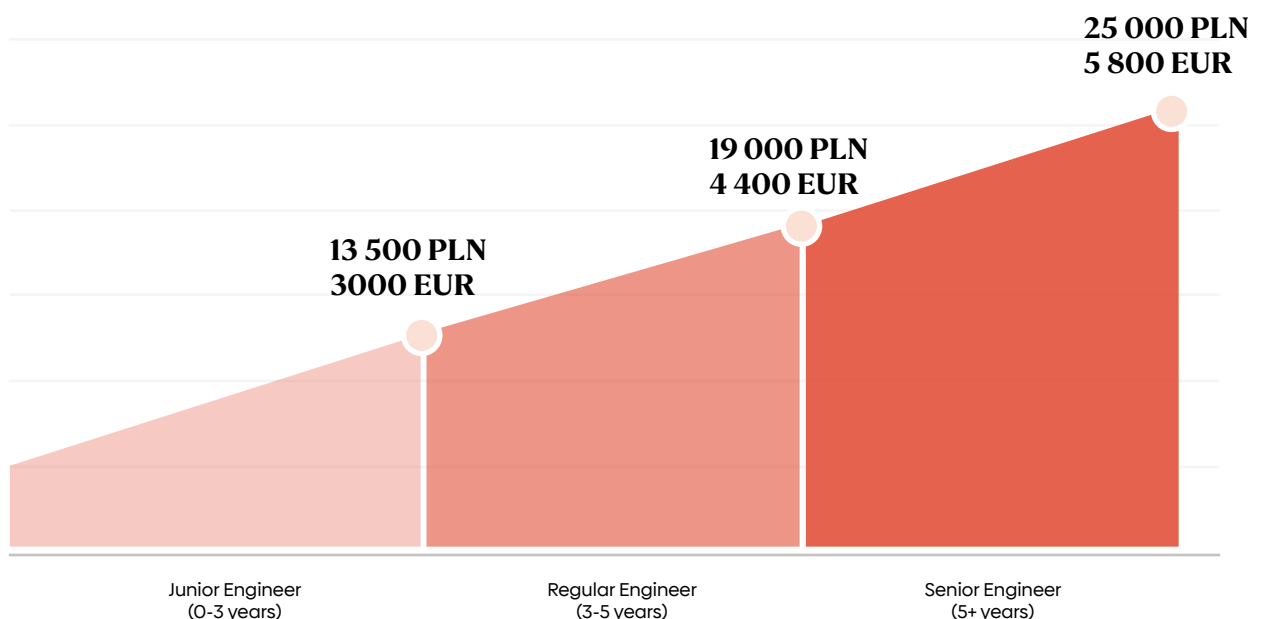
This section outlines the gross monthly salary ranges for software developers, IT specialists, and selected non-technical roles in Poland, under employment agreements. The data reflects current market trends across various seniority levels and includes the most in-demand programming languages and job profiles.

This is how much a **new hire** will expect to be paid on a permanent employment contract.

**17 000 PLN**  
**~4 000 EUR**

Median salary of a mid-level software engineer with 3 to 5 years of experience (gross, monthly, nationwide)

### Gross salary ranges for hiring a software engineer in Poland (monthly, in PLN and EUR)



Sources: MOTIFE Insights 2026, inhire.io, nofluffjobs.com, justjoin.it. 1 EUR = 4.3 PLN

# MOTIFE

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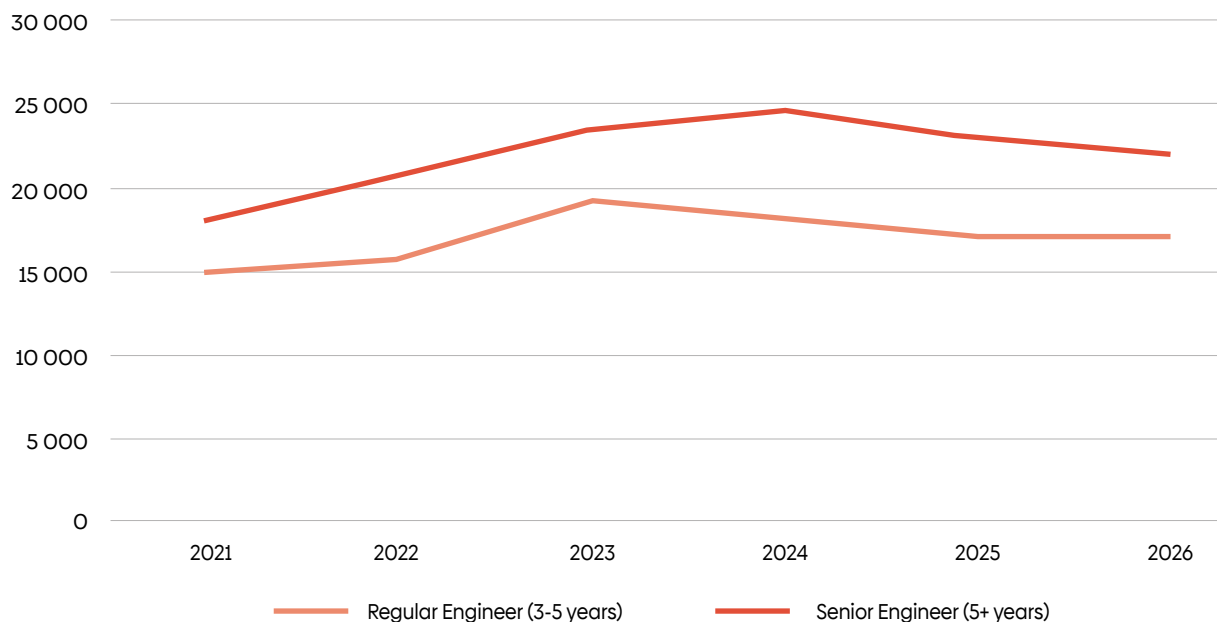


# New hires salaries over time

After several years of dynamic growth, the Polish IT salary market has entered a phase of stabilization, with growth continuing at a more moderate pace. This indicates a transition toward a more predictable trend, with the stable salaries supporting more accurate long-term hiring budget planning and maintaining Poland's cost efficiency.

Compared to the previous year, the median salaries for senior engineers dropped slightly and remain stable for the regular engineers.

## Evolution of median salaries for newly hired regular and senior engineers in Poland, 2021-2026 (monthly, in PLN)



These figures suggest that Poland's tech labor market is gradually stabilizing after a period of overheated growth. Demand is shifting toward experienced specialists in AI, cybersecurity, and cloud infrastructure areas, which are less vulnerable to short-term budget cuts. Employers continue to value Poland's skilled workforce and cost-efficiency, which helps keep the market resilient.

Source: MOTIFE Insights 2026, wynagrodzenia.pl, stat.gov.pl, US Bureau of Labor Statistics

# MOTIFE

## Dominik Biga

Lead Recruiter at MOTIFE



The 2026 salary data shows a market that is becoming more selective rather than moving in one direction across all roles.

In the group with around three years of experience, the lower salary ranges improved in many well-established positions. This can be seen in core development roles such as Java, Python, C#, and JavaScript, as well as in Scrum Master, Business Analyst/Product Owner, and Project Manager positions. At the same time, the upper range for this experience level stayed much more stable in several engineering areas, which suggests that companies are still cautious when extending top offers for mid-level talent.

The clearest positive movement is visible in data-related roles. Data Scientist, Data Engineer, and Machine Learning all recorded growth in the higher salary range for professionals with around three years of experience, while senior data roles remain among the strongest-paid positions in the whole report. Cyber Security Engineer also continues to strengthen, with increases visible across the salary bands. This makes data, AI-related work, and security the most consistently upward-moving areas in this year's edition.

Not every specialization followed that direction. PHP stands out with declines across all salary ranges, while Manual Tester, Salesforce Engineer, and Technical Support show weaker results in selected bands. This means the 2026 report does not point to broad salary growth across the entire IT market. Instead, it shows targeted increases in roles where salary pressure remains stronger, alongside correction or stagnation in others.

At the top end of the market, the highest salary ceilings are still concentrated in architecture and advanced data positions, especially Cloud Architect and Data Architect. Overall, the 2026 outlook presents a picture of relative stability in mainstream roles, stronger growth in selected specialist areas, and a clearer difference between widely available skills and harder-to-find expertise.

# Salary reports and candidates' expectations

There are numerous compensation reports available that present salaries in the IT sector in Poland. Also, websites like Glassdoor and Payscale provide insights into typical pay across the country. The majority of IT job ads include salary brackets, offering relatively transparent access to compensation data.

The information found in these sources can be partially misleading, as it primarily represents current average salaries of employees or median salaries advertised on job portals. These figures may not accurately reflect the expectations of potential new hires, nor the salaries ultimately agreed upon in employment or B2B contracts. Consequently, there can be substantial discrepancies between the reports and the actual candidates' expectations.

**In this report we present salaries offered to candidates when they receive and accept a job offer.**

## Paying above the market level

Some companies offer above-market salaries when hiring new employees. We make effort to exclude these outliers from our datasets. Companies typically do it for one or more of the following reasons:

- Attracting candidates for niche, hard-to-fill senior roles
- Facilitating the rapid hiring of engineers by foreign companies entering the market
- Providing higher salaries in start-ups to offset the „risk-factor” associated with joining a potentially less stable organization

## Methodology

The research was conducted by the MOTIFE Insights team between December 2025 and March 2026. Our aim was to produce a set of salary range data that would be representative of new hires' current salary expectations in Poland.

We chose a methodological approach that combined quantitative and qualitative methods. The quantitative research involved a meta analysis of industry reports and portals (qualified sources: inhire.io, nofluffjobs.com, justjoin.it), salary brackets of jobs advertised on motife.com, salaries offered to candidates by IT companies via MOTIFE, and acceptance rates for those offers.

The quantitative analysis included checking the datasets for outliers, normalizing the values (gross, monthly salary on employment contract;

definition of regular and senior profiles; definition of popular technologies, popular programming and non-programming roles), and then merging data from the different sources with their respective weights.

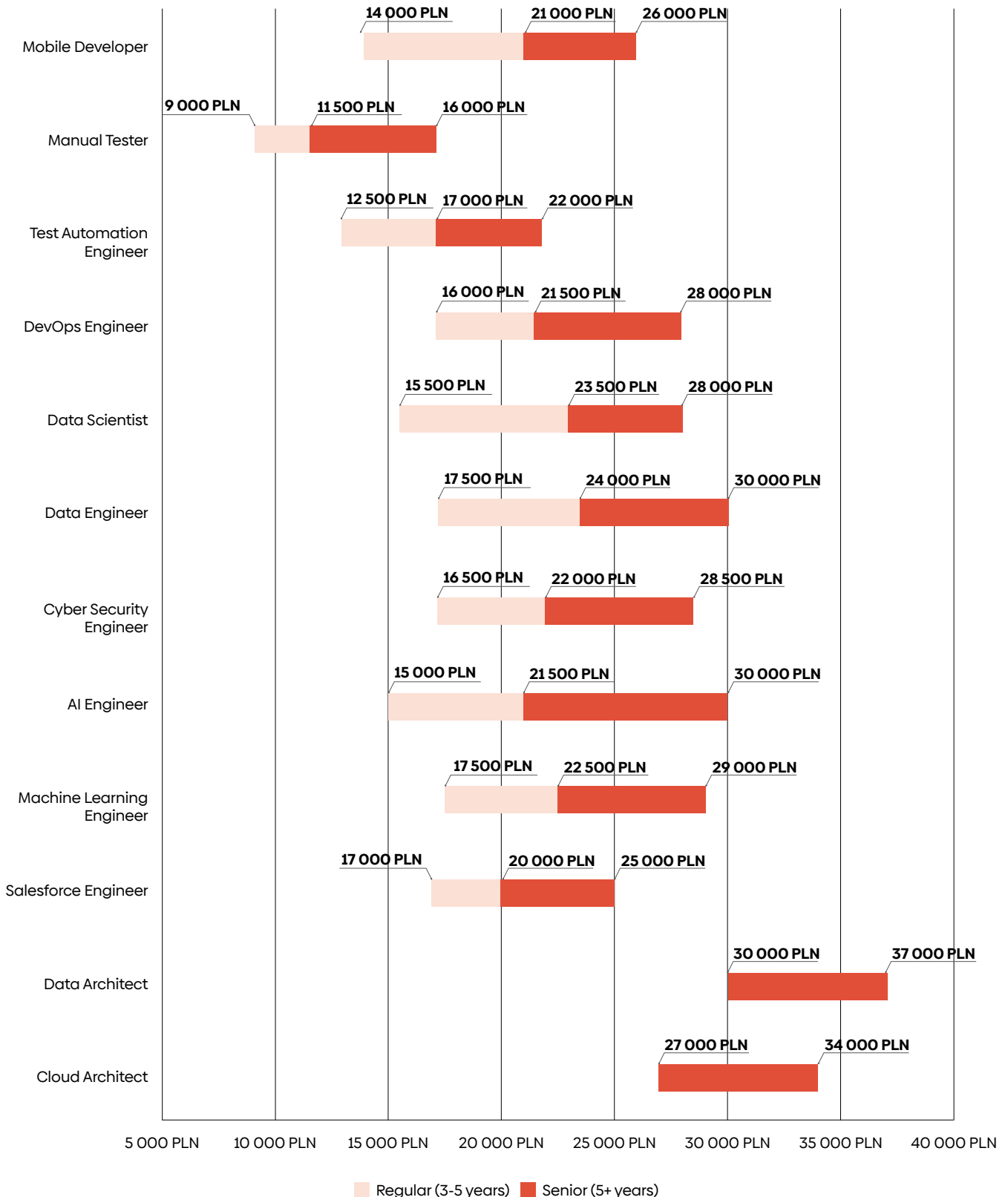
The result was a calibrated salary range for each selected technology or roles, consisting of three salary data points (minimum regular, maximum regular/minimum senior, maximum senior). Qualitative analysis included a series of interviews and dataset reviews with IT recruiters and hiring managers, in order to correct the values by up to 10% if required.

Assumption: 1 EUR = 4.3 PLN. Values in EUR are rounded.



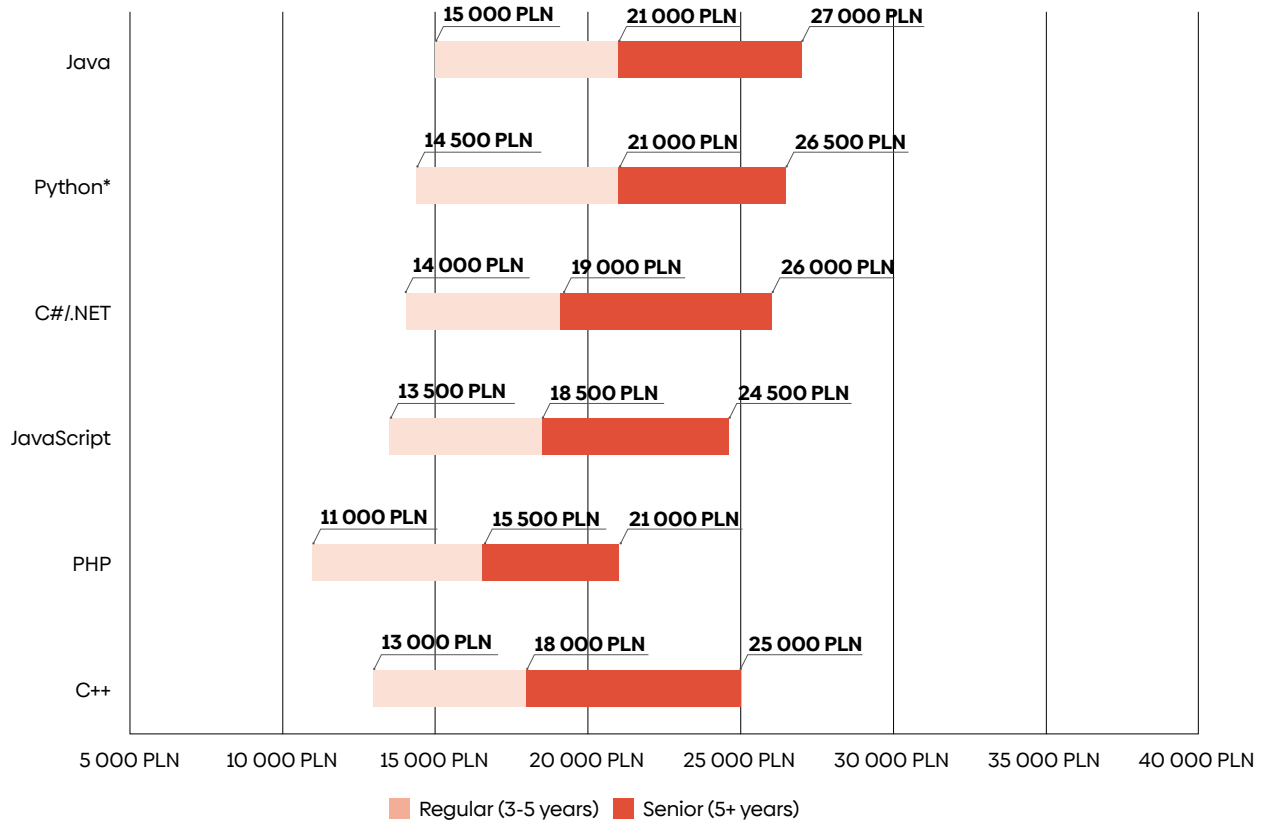
# New hires salary expectations in Poland in PLN

Per most popular technical roles (monthly, gross in PLN)



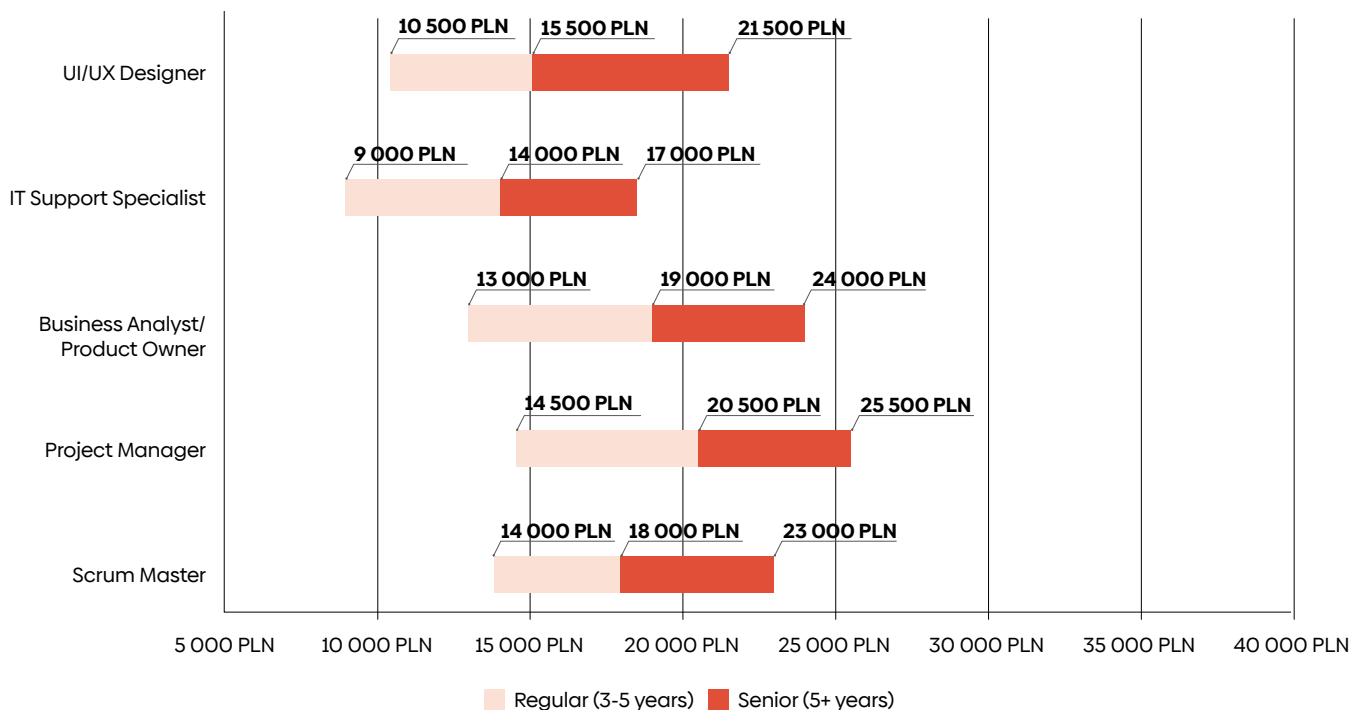
Sources: MOTIFE Insights 2026, inhire.io IT Market Snapshot 2026, nofluffjobs.com, justjoin.it.

## Per most common languages (monthly, gross in PLN)



\*For regular Python development, not Data Science

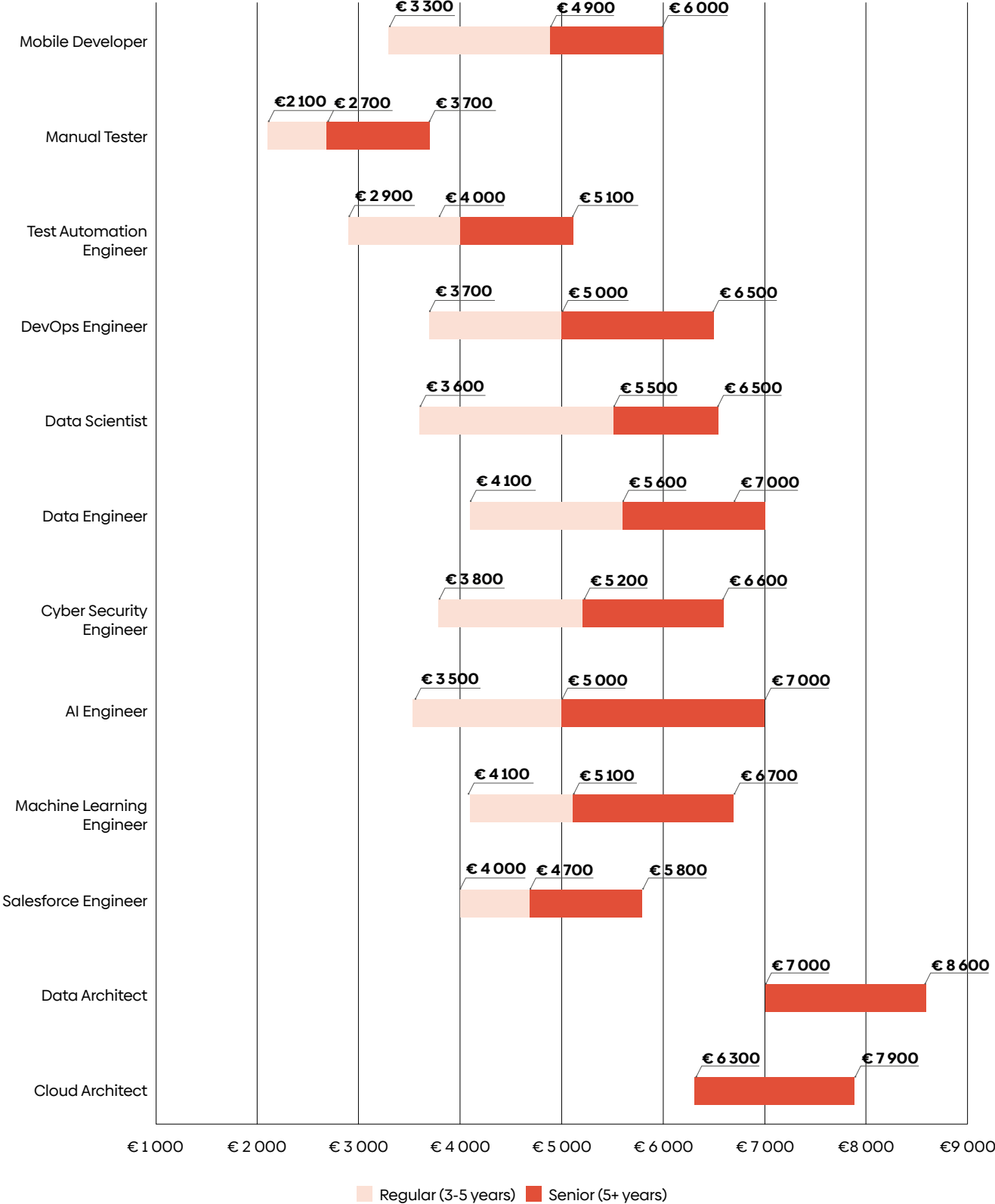
## Per most popular non-technical roles (monthly, gross in PLN)



Sources: MOTIFE Insights 2026, inhire.io IT Market Snapshot 2025, nofluffjobs.com, justjoin.it

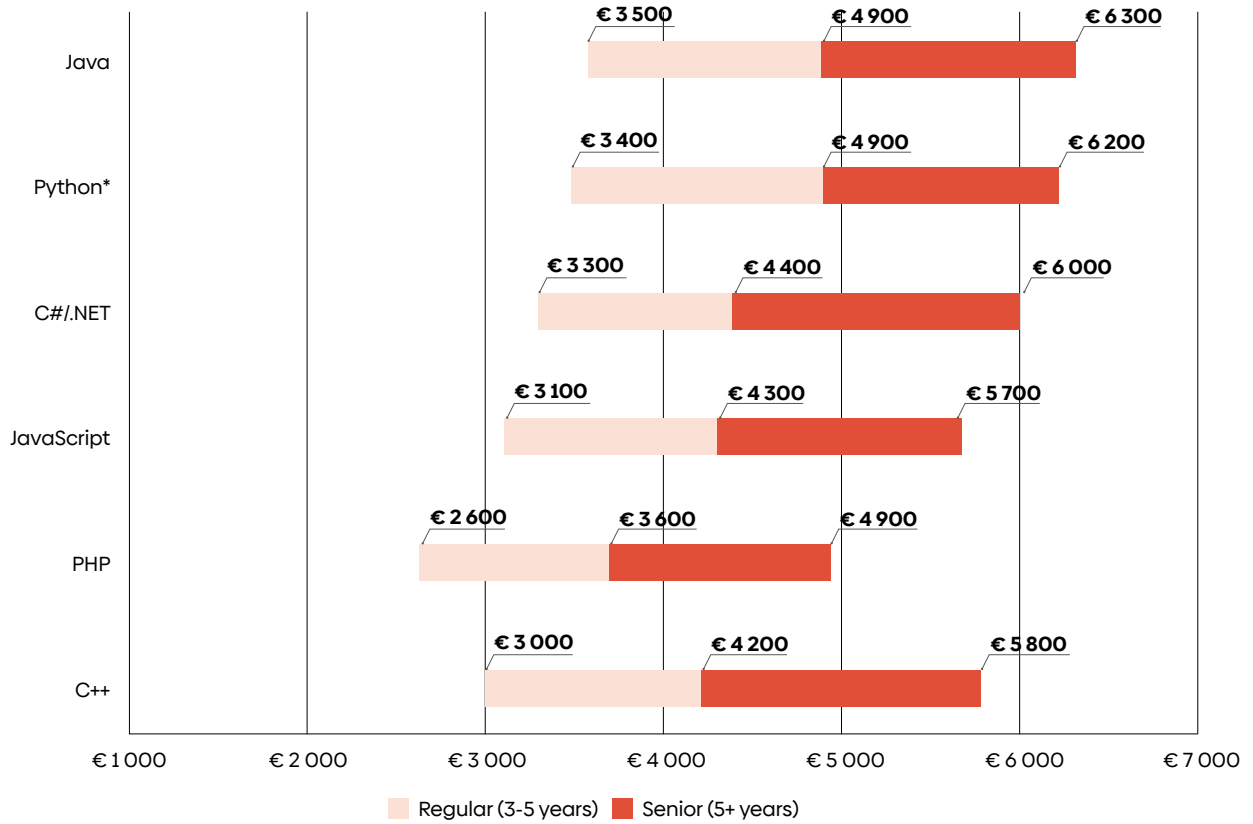
# New hires salary expectations in Poland in EUR

Per most popular technical roles (monthly, gross in EUR)



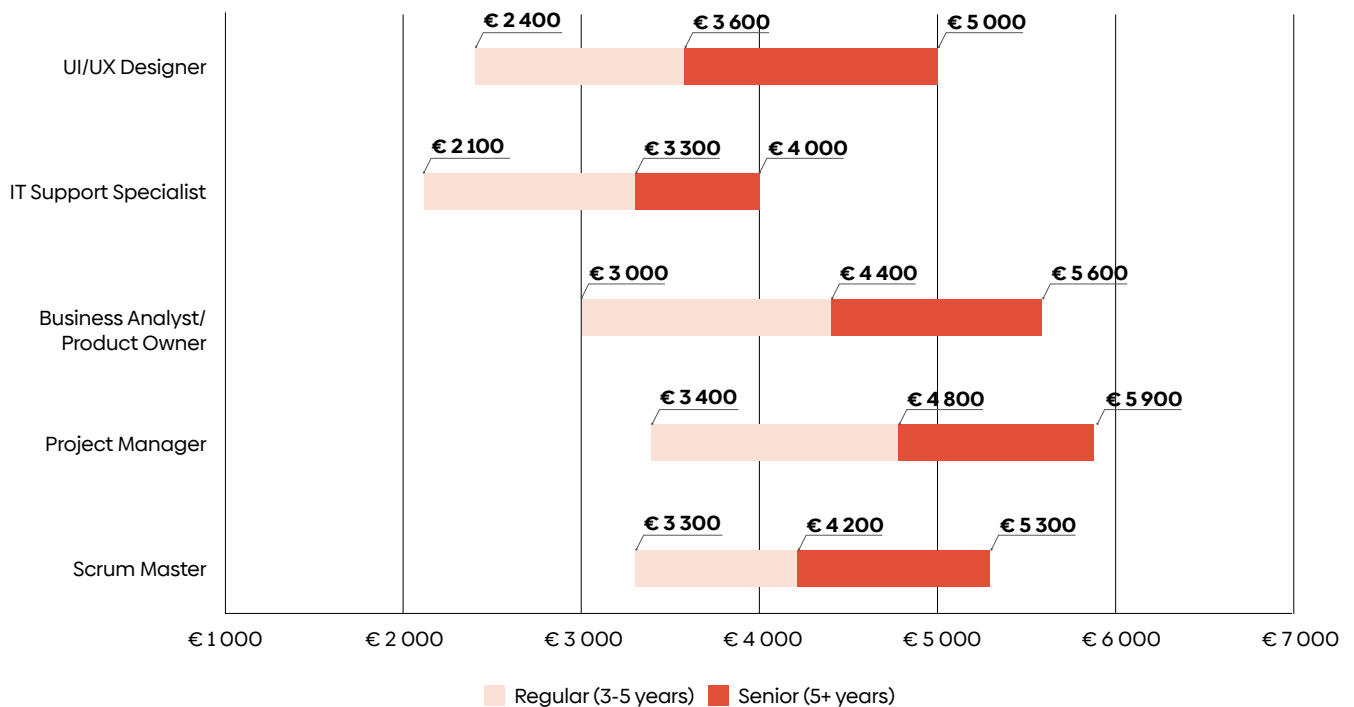
Sources: MOTIFE Insights 2026, inhire.io IT Market Snapshot 2026, nofluffjobs.com, justjoin.it. 1 EUR = 4.3 PLN

## Per most popular languages (monthly, gross in EUR)



\*For regular Python development, not Data Science

## Per most popular non-technical roles (monthly, gross in EUR)



Sources: MOTIFE Insights 2026, inhire.io IT Market Snapshot 2025, nofluffjobs.com, justjoin.it. 1 EUR = 4.3 PLN

# It's not about salary alone

There are companies offering top-range salaries, while others focus on creating a comprehensive Employee Value Proposition (EVP). Companies seeking to enhance their attractiveness should consider the following levers:

## Brand

Well-established companies can expect to pay the lower end of the salary range, while new or less visible brands may need to pay the higher end.

## Benefits

Offering a comprehensive benefits package can make an offer more attractive during recruitment. Consider providing stock options/ESOPs, paid holidays, paid sick leave for B2B contractors, and trips abroad to the headquarters.

## Work model flexibility

Catering to various work preferences, such as fully remote, occasional hybrid, work-from-anywhere, and fully flexible schedules, can increase appeal to candidates.

## Contracts flexibility

Offering choices between permanent and B2B contracts, as well as options for preferred payment currency, can make a difference.

## Technology

Embracing cutting-edge technology and ensuring its proper use are crucial. This includes maintaining a tidy codebase, avoiding technical debt, and implementing effective quality assurance practices.

## Culture

Fostering an organizational culture that promotes and encourages positive behaviors is vital. Consider aspects such as equal treatment, hierarchy levels, decision-making autonomy for team members, and practicing genuine transparency.

# Non-statutory benefits

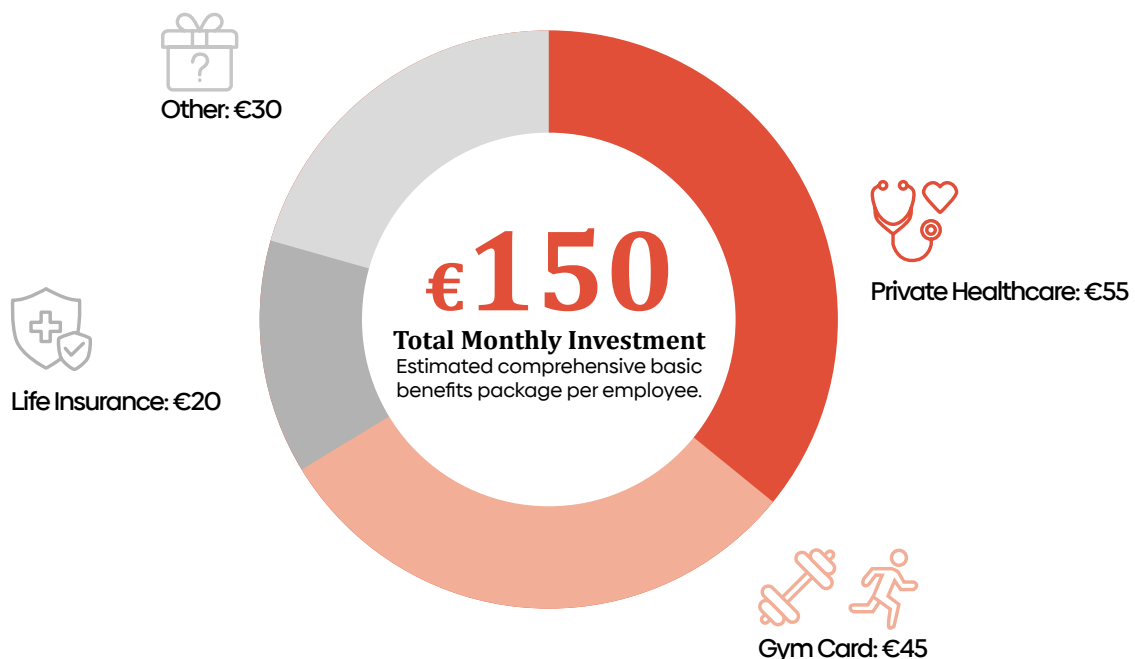
Commonly referred to as „benefits”, non-statutory benefits include all perks offered by employers to attract and retain employees. These perks are distinct from statutory benefits like paid holidays, sick leave, and parental leave, which are mandated by labor law. It is important to note that statutory benefits do not apply to B2B contractors, but companies often extend similar benefits to them.

Popular non-statutory benefits within the IT sector include gym/fitness cards, professional training, and private healthcare. These offerings are often considered the baseline components of an attractive benefits package.

# 150<sub>EUR</sub>

Estimated monthly cost of basic benefits package per employee

## Monthly employee benefits cost breakdown



Source: MOTIFE Insights 2026

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## Focus

# Stock options as a non-statutory benefit in Poland

This section outlines the role of equity-based compensation, specifically RSUs and stock options, as a non-statutory benefit in Poland. It provides an overview of market practices, typical program design, and legal considerations, as well as its relevance in talent strategies, to support decision makers in assessing whether and how such instruments can be implemented when building or scaling teams in Poland.

## Market reality in Poland

Equity-based benefits in Poland are concentrated in international technology companies, selected listed firms, and startups. Most programs are managed at the parent company level, with Polish employees included in global plans. Stock options are a relatively recent addition to the Polish market, introduced primarily by international companies over the past two decades. As a result, many candidates are still unfamiliar with how these schemes work and how to assess their potential value.

This often requires additional explanation during the recruitment process. Employers may support this by providing clear, practical examples, frequently referencing real scenarios from other companies, to help candidates better understand both the mechanics and the long-term benefits of stock-based compensation.

## Typical structure of equity packages

Equity packages in Poland follow global standards, with 3–4 year vesting periods, often including a one-year cliff. In large tech companies, equity can represent 20–40% of total compensation for senior roles. In startups, ESOP pools typically account for 10–15% of equity, with grant size dependent on seniority and timing. In public companies, programs are performance-based and tied to financial metrics, with multi-year vesting.

## Legal and structural context in Poland

Polish regulations allow for the implementation of equity-based compensation programs, particularly within global organizational structures, but they also introduce complexity in areas such as taxation and cross-border compliance. Companies apply a range of instruments, including RSUs, stock options, and phantom shares, depending on their legal and operational context, with proper structuring required to ensure both compliance and transparency for employees. At the same time, as stock options remain a relatively recent component of compensation in Poland, the tax framework is not always fully aligned with these schemes, which can make their settlement more complex. This creates a need for clear guidance and educational support for employees on how such benefits should be reported and taxed, helping to reduce uncertainty and enabling a better understanding of the financial implications of equity-based compensation.

## Role of stock options in talent strategy

RSUs and stock options are increasingly used as part of broader compensation strategies to attract and retain talent in the Polish market. Multi-year vesting structures support long-term retention, while linking compensation to company performance helps align employee incentives with organizational goals. In international companies in particular, equity-based components are becoming a more common element of competitive offers, reflecting evolving expectations among candidates.

# Employment and contracts

## Labor law cheat sheet

The Polish Labor Code is highly detailed and clearly defines the rules governing the employee–employer relationship. In addition, there are a number of practices and customs that, while not codified in law, have become standard and are expected to be observed.

In many aspects the Polish Labor law is aligned to the other European countries' Labor regulations with comparable working time, paid holidays allocations and contractual principles. Polish regulations are considered as business-friendly, while caring for employee status and ensuring a family-friendly environment boasting one of the most generous maternity leave schemes in Europe.

### 40

#### Hours per week

8 hours per day, 40 hours per week working time

### 50-100%

#### Overtime pay

50% regular overtime pay, 100% overtime pay for working nights, Sundays and public holidays

### 251

#### Working days on average

14 days of public holidays annually

### 80%

#### Paid sick leave

From first day of sick leave with medical certificate

### 20 or 26

#### Days of vacation

Vacation entitlement depending on experience

### 55-65 PLN

#### Remote work subsidy monthly

Amount of subsidy an employee working in remote or hybrid setup will receive monthly from employer to cover the costs of home office

### 1 or 3

#### Months' notice

The termination period depends on the length of employment with a given employer:

- 2 weeks' notice for < 6 months
- 1 month's notice for > 6 months
- 3 months' notice for > 3 years

### 100%

#### Paid maternity leave (up to 20 weeks)

That can be extended by a 41-week parental leave (70% paid). Paternity leave lasts 2 weeks (100% paid). Maternity and parental leave can be split between mother and father

# Types of contracts

## Contract for an indefinite period of time

The most popular form of employment in Poland is the permanent contract, referred to officially as contract for an indefinite period of time (in Polish *umowa o pracę na czas nieokreślony*). Hiring on a permanent employment basis usually starts with a 3-month probation period, followed by a contract for an indefinite period of time. For most employees, this type of contract is synonymous of stability and job security.

## Fixed-term employment contract

The Polish Labor Law also offers employment contracts to respond to shorter or unique needs to hire. First of all, the fixed-term employment contract (*umowa o pracę na czas określony*) for a maximum period of 33 months and maximum 3 consecutive fixed-term contracts. This contract is common for temporary replacements such as maternity/parental leaves.

## Probationary contract

A probationary employment contract is used to assess whether an employee is suitable for a role. It can last up to 3 months, though shorter limits apply when the employer plans a short fixed-term contract. It is uncommon to terminate the probationary contract ahead of the original end date.

## Contract of mandate and employment contract for specific task

There is also the contract of mandate (*umowa zlecenie*) for performance of a specified activity on a given period (for example SEO analyst support for a 3-month campaign), and employment contract for specific task (*umowa o dzieło*) for the achievement of a specific result (for example, a freelance graphic designer creating a set of web banners).

## B2B contract

In addition to the regular employment contracts, the so called B2B contracts have become prevalent in the market. Rather than an employment contract between an employer and an employee, the B2B contract is a service agreement between a company and an individual for specific services. Typically, an individual is acting as a sole entrepreneur. This type of engagement is attractive particularly for more experienced engineers for its financial benefits and self-entrepreneurial freedom.

# B2B contracts

B2B contracts are a widely used engagement model in Poland's IT sector, particularly among senior specialists working with international companies. They enable flexible cooperation and are often used to support rapid team scaling.

## 30-40%

Estimated share of B2B contracts vs. permanent contracts for new hires in the Polish IT market

## 10-25%

Extra income an employee can get after taxes on B2B contract compared to permanent contract

### Compensation

An employee can get an extra 10% to 25% of income after taxes on a B2B contract compared to a permanent contract, depending on the taxation model, income level, and scope of services. From the contractor's perspective, B2B arrangements can result in higher net income, mainly due to more flexible taxation and the ability to deduct business-related expenses. However, the end result depends on individual circumstances and the chosen tax scheme.

### Market share

B2B contracts account for approximately 30–40% of new hires in the Polish IT market, with higher adoption among senior engineers and professionals in international environments. Key considerations

### B2B arrangements must reflect genuine

business-to-business cooperation. Elements such as fixed working hours, direct supervision, or limited independence may increase the risk of reclassification as employment under Polish law. For companies without a legal entity in Poland, direct contractor engagement may create tax or permanent establishment risks, depending on the structure of cooperation.

### When to use B2B

B2B contracts are a commonly used employment model in Poland, driven by local talent expectations and market practices. While less familiar to many international companies, their adoption is often necessary to remain competitive, particularly in the IT sector where candidates, especially in senior and niche roles, more often expect this form due to its flexibility. Smaller companies are typically more flexible in implementing B2B arrangements, with fewer compliance constraints.

## Primary differences between permanent employment and B2B contracts

		Permanent	B2B (Contracting)	
TAX	Personal Income Tax	1 model – Progressive tax: 12% income tax rate under 120K PLN annually, and 32% income tax rate over that threshold	3 models – Flat tax: 19% flat rate, Progressive tax: 12%-32%, Lump Sum tax: 8.5% or 12% for IT, and up to 17% for other roles	
	Social Security	Approx. 23% of gross salary at the charge of the employee and similarly approx. 19% to 23% at the charge of the employer, capped at approx. 282K PLN of annual income	Entirely at the charge of the contractor. Total monthly cost is a mix of flat and variable contributions: flat from 420 PLN or 1 900 PLN depending on duration of self-employment + variable 4.9% to 9% of income depending on personal income tax model	
	Cost Deduction	It is possible for the employer to implement a tax-deductible costs scheme for creative work	Flat tax/Progressive tax: The contractor can deduct costs incurred by the one-person company (hardware, leasing etc.) Lump-sum tax: No cost deduction allowed	
		Rate	Monthly	Typically daily or hourly
CONTRACT	Duration	Usually starts with 3-month probation period, followed by indefinite contract		Typically indefinite or 1 year
	Notice	Depending on employment length, notice period can either be 2 weeks, 1 month or 3 months, or custom by mutual agreement		Typically 1 month
		Annual leave	20 or 26 days / year	None or custom
BENEFITS	Sick leave	Unlimited		None or custom
	Maternity/paternity leave	Yes		None
	Benefits package	Yes		None or custom

# Market customs around B2B contracts

B2B contracts leave a level of flexibility in terms of contractual details and benefits. These are the trends observed for custom agreements in the Polish IT market.

## ■ Probation period

None. The first month is usually regarded as a trial period, but can be ended at any time as per notice period.

## ■ Notice period

1 month, however, this can be 2 or 3 months for key individuals in senior positions.

## ■ Holidays

There are no paid annual leave and public holidays on B2B status. It is up to the contractor to take unpaid days off, in agreement with the company hiring his services. Some companies address this by offering an increased monthly rate with a built-in annual budget cap equivalent to the value of standard leave entitlement, allowing contractors to avoid financial loss. This rate uplift typically reflects the equivalent of 15–25 days of leave and is agreed upfront as part of the annual commercial terms.

## ■ Sick leave

There is no paid sick leave on B2B status. The contractor needs to take an unpaid absence if he is unable to perform his work duties. We observed that some companies allow flexibility in the form of remote and flexible work.

## ■ Non-exclusivity

Contractors are allowed to offer services to other companies unless this would violate competitive clauses of their contracts.

## ■ Benefits package

B2B contractors are not guaranteed to receive the same benefits package offered to regular employees such as medical coverage, a gym pass or life insurance. In order to keep attracting talent, we observed that some companies would offer access to these benefits packages to B2B contractors with costs recharged to contractor.

## ■ Office perks and team building events

Most companies choose to partially include contractors in their office environment and team culture. However, companies should be mindful that the degree of organizational integration may be a significant factor in reclassification assessments. Getting this balance right benefits everyone: contractors feel part of the team where it matters, while the commercial nature of the arrangement remains clear.

Opting for a B2B contract can be beneficial for both the employer and contractor. However, this requires legal advice and must be done with greatest care to comply with Polish law. Improperly written B2B contracts can be questioned and considered to be employment contracts.

## Focus

# Frequently asked questions about B2B contracts

## Are B2B contracts like freelance contracts in the United States?

It's important to note that in Poland's IT industry, B2B contracts and self-employment are not viewed as freelance or entrepreneurial arrangements, as they often are in the United States. Instead, contractors typically work exclusively with one client in a long-term relationship. Engagements usually last for a year and are renewed annually, though some are open-ended. Contractors are paid a daily rate that is generally comparable to the compensation of salaried employees. These contracts often include strict non-compete clauses, limiting contractors from taking on other work without prior approval.

## How to calculate a B2B contract compensation?

It is common for B2B contract rates to be up to 15% higher than the gross salaries offered to permanent employees, depending on the specific terms of the B2B agreement. Since contractors typically don't receive paid vacation, their total annual compensation can be even greater due to more billable working days. Additionally, compensation may vary depending on whether the company hires B2B contractors directly from abroad or through its Polish entity. Because we would add this new focus page the image on page 147 will have to go away.

## Do all companies offer B2B contracts?

The use of B2B contracts varies by company. Some companies, particularly small and medium-sized businesses, offer them with few or no restrictions, although many still prefer employment contracts. Other companies, especially large enterprises, do not offer B2B contracts at all. An increasingly common approach is to hire B2B contractors through an umbrella company, a practice used by both medium-sized and large companies. Although this involves additional costs, it helps eliminate the compliance risks associated with engaging contractors directly.



# Łukasz Kania

Partner at K&P Attorneys



In Poland's IT market, B2B contracting has become a familiar and commercially effective way of engaging talent. Properly structured, it is a relationship between two independent businesses rather than between employer and employee: the contractor operates in their own name, invoices for services, manages their own tax and social security, and assumes genuine business risk.

Its popularity, however, should not be mistaken for legal neutrality. Under Polish law, the decisive issue is not how the parties describe the arrangement, but how it functions in practice. Where work is performed for remuneration, under the employer's direction, and at a place and time designated by the employer, the relationship may be treated as employment regardless of the contractual label. In that sense, B2B is not a legal alternative to employment, but a distinct cooperation model that must reflect real independence.

This is where reclassification risk arises. The warning signs are usually less about the contract itself and more about the operating model: day-to-day supervision, fixed working hours, required presence in a designated place, limited autonomy

as to how the services are delivered, integration into internal reporting lines, and no meaningful entrepreneurial risk on the contractor's side. The more the arrangement begins to resemble organisational subordination, the harder it becomes to defend it as genuine B2B.

That distinction gains additional importance from 8 July 2026, when new rules strengthening the powers of the National Labour Inspectorate come into force. Under the amended regime, the labour inspector may issue an administrative decision establishing the existence of an employment relationship where the statutory criteria are met. The reform is aimed not at legitimate independent contracting, but at arrangements which, in substance, replicate employment.

For IT companies entering or already operating in Poland, the practical conclusion is straightforward: B2B remains a lawful and valuable engagement model, but only where the commercial structure is matched by operational reality. In this area, the real legal risk does not lie in the title of the contract. It lies in the facts of the relationship. Against that background, businesses may benefit from a periodic legal and operational review of their contractor models and agreements, supported where appropriate by qualified legal advisers and experienced business support providers familiar with the Polish HR and employment framework.

# How to recruit IT talent in Poland?

## 4-8 weeks

Time to recruit an experienced IT specialist

Recruitment projects for IT specialists in Poland usually take between 4 and 8 weeks. After accepting an offer, candidates have a 1-month, or in some cases 3-month, notice period.

Companies adopt four main approaches to sourcing talent in Poland: utilizing in-house recruitment function, hiring external recruitment services, RPO or staff augmentation services.

## In-house recruitment function

When entering a new market, an obvious choice for many companies is to hire candidates using their own recruitment team. To be successful with this option, a company needs to build a recruitment function in the chosen location, as hiring with a remote recruitment team comes with challenges.

Building one's own team, however, is an investment which requires time and can slow down initial growth. Recruiting for senior IT roles can be particularly difficult with only an internal team due to a limited database, relations with candidates, and a need for in-depth knowledge of the market.

An in-house recruitment scenario is often chosen when the demand for recruitment is high in the longer perspective, but a slow start is acceptable and when there is no budget for external recruitment agency fees.

To decrease the hiring cost, but to keep a fast pace, companies often choose a hybrid mode when they start with an agency and then continue with a mix of internal, agency and potentially RPO consultants.

## External recruitment services

There are numerous local and global IT recruitment agencies operating in Poland. The scope of involvement of the agencies differs from one to another, but usually consists of advertising the roles and actively attracting candidates, screening interviews, coordination of the process with hiring managers and other interviewers, and finally issuing an offer.

With experienced technical recruiters, agencies use their in-depth knowledge of the local IT job market and professional recruiting tools to accelerate the hiring process.

Some companies offer a success-fee based model, whereas some other agencies offer additional variants such as retained search.

The agency fee is anywhere between 15% and 20% of the new hire's yearly gross salary. The value can be different for the most senior roles.



# Recruitment Process Outsourcing (RPO)

In addition to traditional external recruitment services, some agencies propose Recruitment Process Outsourcing (RPO). In RPO a team of recruitment professionals is plugged-in into the in-house function of the hiring company and often uses the company's branding for a seamless experience for the candidate.

RPO is increasingly popular among companies that have substantial hiring plans, but don't have know-how, or need to staff a large wave of hiring, which might be followed by a period of smaller demand.

The typical fee structure for RPO consists of several components including monthly cost and a reduced placement fee. The monthly cost may cover various additional scope elements such as recruitment administration or recruitment management.

RPO can take many shapes and does not only apply to candidates' acquisition roles such as sourcers or recruiters. An entire array of recruitment roles can be subject to the RPO model, including Recruitment Lead or Talent Acquisition Business Partner.

## Staff augmentation services

Staff augmentation, also known as team augmentation, is a solution when an outsourcing partner provides engineers who are plugged into existing teams.

This option is different from a managed service practice where a whole project is outsourced to a third-party provider. With staff augmentation, the candidates are onboarded as members of the company's team and the project ownership remains in-house.

Staff augmentation is used when a company cannot or does not want to hire engineers on a traditional employment contract. Typical scenarios are:

- company is unable to hire sufficient number of people in a short period of time
- a project has a budget for limited time
- company doesn't accept B2B agreements with candidates
- company doesn't have a legal entity in Poland to hire permanent employees
- company has a limit on the headcount

There are several models of staff augmentation: a rapid staff augmentation which involves the outsourcing of engineers already on the outsourcing partner's payroll or dedicated staff augmentation when candidates are hired from the market to match a precise set of skills.

The costs structure of staff augmentation can vary from one outsourcing partner to another.

Most common models include hourly and daily rate, or a mark-up on monthly gross salary, and is inclusive of social security, benefits, payroll and HR support.

# MOTIFE

## Agnieszka Widacka

Head of Recruitment at MOTIFE



While the Polish IT market continues to stabilize, one of the most visible shifts heading into 2026 is the changing profile of the software developer. Companies increasingly look beyond narrowly specialized experts and place greater value on professionals who combine deep technical knowledge with a broader technological perspective.

While highly specialized developers remain essential in complex projects, organizations more often seek engineers who can operate across several domains and collaborate effectively with different teams, for example, backend developers who can also work with cloud infrastructure or data pipelines.

This change reflects the growing complexity of digital products and the integration of technologies such as AI, data platforms, and cloud environments. Developers who understand not only coding but also architecture, data or product context are becoming particularly valuable. In practice, this often means combining development work with tasks related to system design, performance optimization or close

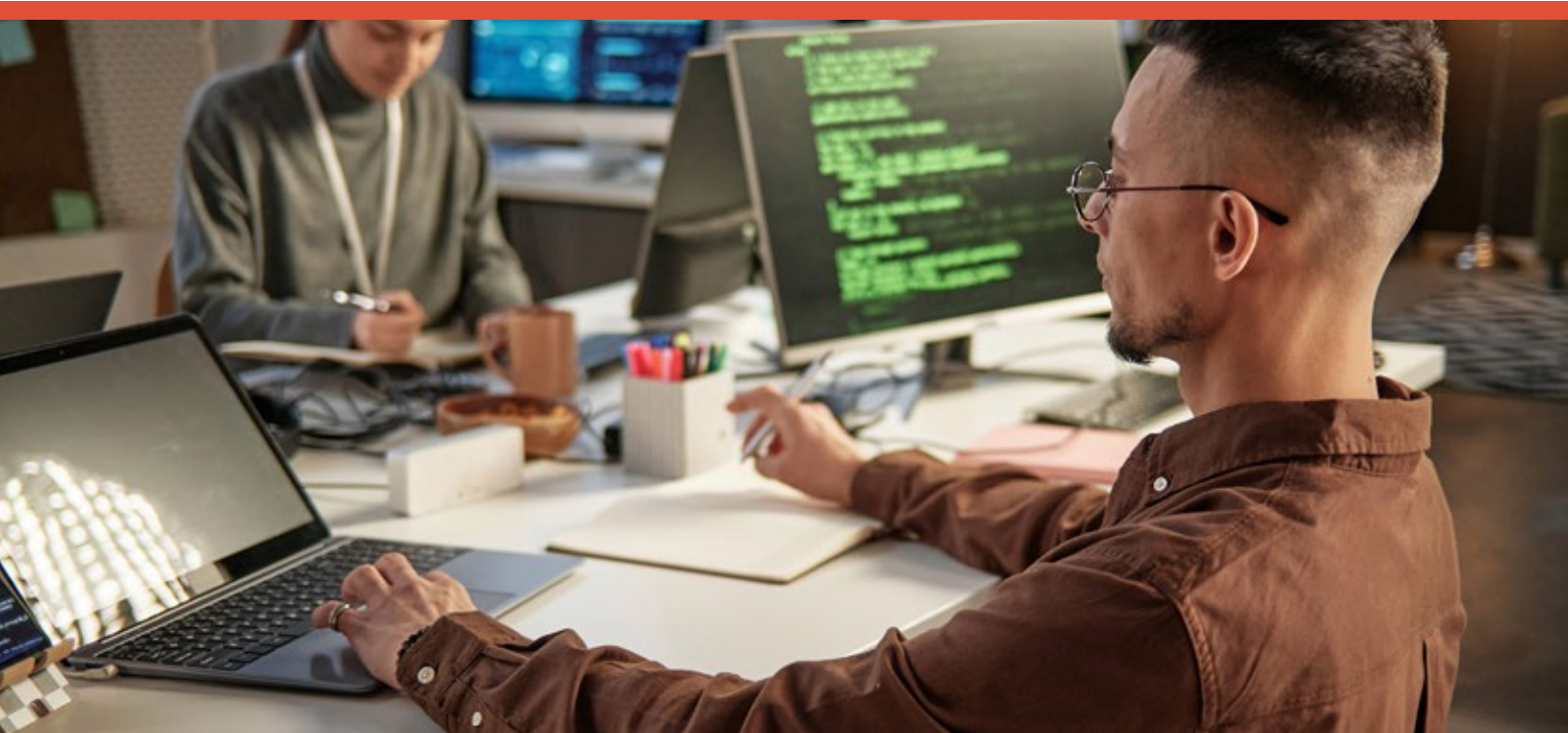
collaboration with product teams. Employers increasingly appreciate professionals who combine depth in one area with the ability to work across multiple technologies and contribute to wider business goals.

At the same time, candidate behavior is evolving. Two trends increasingly visible on the market are job-hugging and career cushioning. Job hugging refers to professionals deliberately staying in their current roles, often prioritizing stability over change. After a period of dynamic salary growth and frequent job moves in IT, many specialists have become more cautious due to economic uncertainty and slower hiring processes, which we also observe in longer decision-making cycles and lower response rates to outreach.

At the same time, career cushioning is gaining momentum. Developers proactively strengthen their career security by expanding their networks, developing new skills, or occasionally engaging in recruitment conversations. In practice, candidates are more likely to join initial calls or stay in touch with recruiters, but less frequently proceed to final interview stages. For employers and recruiters, this means that attracting talent requires more time and relationship-building, as many candidates remain open to discussions but are less willing to change jobs quickly.

# Comparison of talent acquisition models

Talent acquisition model	When recommended?	What to be careful about?
<b>In-house recruitment</b>	<ul style="list-style-type: none"> <li>You expect constant staffing needs over time</li> <li>You are able to accept a slow start</li> <li>Your budget is tight</li> </ul>	<ul style="list-style-type: none"> <li>Everything will depend on the team you build</li> <li>In-house hiring is a long-term commitment</li> <li>Performance management is more difficult</li> </ul>
<b>Agency offering success-fee / contingency recruitment</b>	<ul style="list-style-type: none"> <li>Your recruitment needs fluctuate over-time</li> <li>The roles are difficult and niche</li> <li>You are ready to pay premium for premium service</li> </ul>	<ul style="list-style-type: none"> <li>Pick a local agency/company that has recognizable brand and knows your industry</li> <li>Bigger agency/company can perform not as good as the smaller ones</li> <li>Pick a provider that will care about your culture</li> </ul>
<b>RPO (Recruitment Process Outsourcing)</b>	<ul style="list-style-type: none"> <li>You are planning a significant wave of recruitment</li> <li>You may need to scale it down after a certain period</li> <li>The price point for success-fee recruitment is too steep</li> </ul>	<ul style="list-style-type: none"> <li>Make sure the KPI/SLAs are clear</li> <li>Make sure the fees are competitive for large volumes</li> <li>Pick a provider that will care about your culture</li> </ul>
<b>Staff augmentation / Contract / Outsourcing</b>	<ul style="list-style-type: none"> <li>You need staff quickly</li> <li>You want to test the idea of offshoring</li> <li>You are not certain about the length of the need</li> </ul>	<ul style="list-style-type: none"> <li>You will want to have an influence over the staff selection</li> <li>You will want to make the team feel as part of organization</li> <li>The investment you make in the training of staff might be lost</li> </ul>



# How to employ IT talent in Poland?

Before finding the right talent, it is crucial to answer a fundamental question: how will we engage the people? Answering is not always simple, and often depends on the specificity of the company and the needs..

## Hire through own entity

For companies with long term strategy for Poland, the most viable option is to set up your own entity. This entity then employs the Polish team.

### Setting up and running a subsidiary with an in-house team

In this scenario the company establishes a separate legal entity in the foreign country. This option gives full control over the process and then operations, and prepares for a potential significant growth. In the same time, setting up and running a subsidiary in a new country relying mostly on own team can be expensive and time-consuming, requires understanding of local laws and regulations and may require significant ongoing management. This would be advised to companies that have internal teams with know-how and capacity to do it.

### Softlanding: setting up and running a subsidiary with a partner

In the softlanding model, a local partner provides an end-to-end support in establishing and running a legal entity in Poland. Local partner will provide staff e.g. HR, Finance, Legal and processes e.g. finance, HR, templates, tools, recommendations related to vendors, best practices, etc. The staff engagement will scale depending on the needs of the organization. This allows to significantly reduce overhead with setting up own subsidiary, particularly associated with learning, handling remotely supporting functions in a new market, and employing fulltime supporting functions in Poland. There is still an overhead associated with global supporting functions involvement in the process. In this model, a company has full control over their operations in Poland.

# 20

The recommended team size for transitioning from an EOR to your own entity in Poland

# MOTIFE

## Magdalena Fortuna-Sanocka

Head of HR at MOTIFE



Hiring through a local entity in Poland is a common model for international companies building a long-term presence. It ensures full control over the workforce, alignment with global structures, and stronger employer branding. Direct employment is also well perceived by candidates, supporting attraction and retention.

The process starts with establishing a legal entity, typically a limited liability company (Sp. z o.o.), registered in the National Court Register. This is followed by tax registration (CIT, VAT) and registration with the Social Security Institution (ZUS), along with the setup of compliant payroll and accounting processes.

Once operational, companies can hire employees under Polish labor law. This requires properly structured contracts, payroll execution, and handling of taxes and social security contributions. In IT, companies may also engage contractors under B2B agreements, which must be structured carefully to avoid misclassification risks.

Despite clear regulations, companies face challenges during setup and operations. Polish labor law is formalized, especially in working time, termination rules, and documentation. Payroll and tax processes are complex, and errors may result in penalties. Building internal HR and finance functions without local expertise increases risk and extends timelines.

Local expertise is important. Practices from other markets do not always translate directly. It supports compliance, improves HR processes, and reduces risk while accelerating setup.

MOTIFE supports companies in building HR and finance operations from the ground up, acting as an interim partner. This includes managing the employee lifecycle, payroll coordination, and compliance. The result is faster market entry, reduced risk, and a stable, scalable foundation for growth in Poland.

Hiring model	When recommended?	What to be careful about?
<b>Setting up and running a subsidiary with in-house team</b>	<ul style="list-style-type: none"> <li>You have a capacity and know-how in the organization to manage, coordinate, execute the process yourself</li> <li>You have substantial hiring plans of at least 30 to 50 people</li> <li>You have in-house experience doing this, preferably in Poland</li> </ul>	<ul style="list-style-type: none"> <li>It is always significantly more difficult and more complex compared to what it may seem at first glance</li> <li>The most time consuming are non-value added elements</li> <li>You don't know what you don't know</li> <li>Significant learning curve</li> </ul>
<b>Softlanding - Setting up and running a subsidiary with a partner</b>	<ul style="list-style-type: none"> <li>You want to have your own entity, but you don't have a sufficient know-how and capacity in the organization</li> <li>You don't want invest in the supporting functions on the ground upfront</li> <li>You want the entity up and running quickly</li> </ul>	<ul style="list-style-type: none"> <li>Your global supporting functions will need to be involved</li> <li>The more you trust your local partner, the easier and faster the process will be</li> <li>Don't go this direction if you are uncertain about your plans for Poland or if you are not planning to have more than 10 people in the next 24 months</li> </ul>

## Hire without own entity in Poland

If setting up own entity is not possible when building a team in Poland, there are several alternative options available that provide similar benefits without the overhead of running a subsidiary.

### Umbrella Company, EOR, PEO

Using a local partner who acts as an umbrella company, Employer of Record (EOR) or Professional Employer Organization (PEO) allows hiring without establishing an entity. In this scenario an external organization employs staff on behalf of the company, but it also provides additional services like benefits administration and HR. No local subsidiary is established to avoid overhead. This approach helps reduce administrative burden, assures tax and payroll and compliance with local laws are handled, and is most of all quicker, easier and cheaper to set up than any other option. Local partners can also help understand local practices and regulations. Some of them can also offer additional benefits' packages to the team members.

Using an umbrella company can be also useful when a company has a subsidiary in Poland but would like to offset the risk of engaging individuals on B2B contracts.

### Hiring independent contractors directly

As an alternative do-it-yourself option, companies can choose to hire Polish contractors directly. In this case a service contract is signed directly between a contractor and a foreign company. This is a very good option when a company is looking to hire only a handful of specialists and is able to coordinate the HR and payment process. In addition, this approach requires the contractors to be comfortable with such setup. It also usually excludes employment on employment contract and allows for B2B contractors only. Potential risks include limited control and compliance. This approach allows eliminating the cost of a local provider handling of HR and payments, but also typically won't allow for any local benefits like private health care or life insurance.

In this option, companies can also use one of the global payroll providers to facilitate the process although it does come with an additional cost.

# MOTIFE

**Hire your team in  
Poland on your own  
terms.**



**A single partner for  
recruitment and tailored EOR.**

**[motife.com/eor](https://motife.com/eor)**



# Rafał Korczyński

Director at PWC Poland



The growing shift towards building own entities in Poland reflects an evolution in how companies approach value creation and operational control. Organizations increasingly aim to retain key knowledge and capabilities internally, rather than distributing them across multiple external partners.

Establishing an own entity enables full ownership of expertise, stronger alignment with business goals, and long-term capability building. It also supports employee engagement; companies want teams to feel part of the organization, directly contributing to its success rather than operating as external providers.

There are also financial incentives supporting this model. Investment programs and tax-related benefits can make building internal structures more attractive, particularly at scale. These advantages become visible when organizations plan larger operations, typically exceeding several dozen roles.

At the same time, companies often underestimate the complexity of execution. The gaps are usually not in strategy, but in delivery. Recruitment costs, employer branding, HR capacity, and project coordination are frequently overlooked. Organizations assume they can manage internally, only to realize their structures are not designed for such initiatives.

In practice, the key risks concentrate around recruitment, change management, and partnership strategy. Lack of structured hiring slows growth, while weak governance impacts timelines and costs. Companies also underestimate the value of experienced partners, even though collaboration can significantly accelerate setup and reduce risk.

Ultimately, building an own entity must be anchored in a long-term strategy. It should clearly define the role of Poland in the organization and how it supports future growth. Equally important is exposure; bringing senior stakeholders on-site helps validate the decision. Once they see the ecosystem, talent, and existing operations, the business case becomes self-evident.

# Focus

## Employer of Record

Employer of Record (EOR) enables companies to employ talent in Poland without establishing a local legal entity. It is commonly used when entering the market, testing a new location, or starting hiring ahead of a long-term setup.

The model supports fast market entry and reduces complexity related to local employment regulations. Typical use cases include building a pilot team, securing key hires ahead of entity setup, or bridging the period until a local subsidiary is established.

EOR is also relevant for companies aiming to limit administrative overhead and compliance exposure, while maintaining flexibility in scaling teams.

Under this model, the EOR provider acts as the legal employer and manages employment contracts, payroll, taxes, and benefits in line with Polish law. The client company retains full control over the employee's work and performance.

### When EOR is worth considering

Enables hiring in Poland without establishing a legal presence, reducing time to market.  
Limited internal HR or legal capacity  
Transfers responsibility for employment administration, payroll, and compliance to an external provider.

#### Interim solution before entity setup

Allows companies to onboard employees while preparing for a future legal entity.

#### Small or distributed teams

Suitable for hiring individual contributors or initial teams without operational infrastructure.

#### Mitigating compliance risks

Provides a compliant alternative to B2B or contractor models, reducing the risk of misclassification.

### What to look for in an EOR partner

#### Expertise in Polish labor law

Ensures compliance with local employment regulations, tax requirements, and HR practices.

#### Structured onboarding and processes

Offers standardized and transparent procedures for hiring, payroll, and employee lifecycle management.

#### Scope beyond employment administration

Includes support in employee experience, benefits, and day-to-day HR operations.

#### Operational responsiveness

Ability to adapt to hiring timelines, changing headcount, and evolving business needs.

# MOTIFE

## Marta Kania

Head of Outsourcing Operations  
at MOTIFE



For many international companies entering the Polish market, the key challenge is not access to talent, but how to start operations quickly while limiting legal and operational complexity. As a result, organizations look for efficient ways to engage local specialists without immediately building a full local structure.

Flexible employment models have become a common entry approach. They allow companies to access talent and launch operations quickly, while maintaining the flexibility to scale or adjust their presence. In most cases, this is a transitional stage rather than a long-term setup.

Risk management is a central factor. Companies aim to reduce legal exposure and operational burden when managing workforce relationships in a new market. Instead of navigating local regulations internally, they seek solutions that

combine simplicity with clear legal safeguards. In Poland, cooperation with independent contractors under the B2B model is widely used, particularly in the technology sector. While it offers flexibility and speed, it requires a clear understanding of local regulations and compliance risks.

Over the past year, the focus has shifted toward strengthening the legal security of contractor relationships. Many companies now look beyond internal agreements for structures that ensure compliance and reduce the risk of audits.

One model gaining traction involves a third party contracting directly with the contractor, while the client contracts with the third party. This removes the direct contractual relationship with individuals and transfers legal responsibility to the provider, reducing compliance risk.

As regulations evolve, companies increasingly prioritize solutions that balance flexibility with legal certainty when structuring access to talent in Poland.

**Start a conversation on hiring in Poland  
without an entity.**

**[motife.com/meeting](https://motife.com/meeting)**



# BOT

Build-Operate-Transfer (BOT) is a model used by companies to establish and scale software development operations in new locations with reduced risk and faster time to market. In this model, a local partner, often a software house, sets up and runs the development team on behalf of the client. Once the operation is mature and stable, ownership is transferred to the client, who takes over the team and infrastructure as their own local entity.

Below is a summary of the key advantages and challenges of using software houses for the BOT model:

Pros	Cons
<b>Faster setup:</b> Leverage existing infrastructure, talent, and processes to launch quickly.	<b>Limited control initially:</b> In the early stages, operations are led by the local partner, not the client.
<b>Access to skilled talent:</b> Immediate access to experienced engineers and tech specialists.	<b>Knowledge transfer risk:</b> Requires careful planning to ensure know-how is effectively transferred at the "transfer" stage.
<b>Operational efficiency:</b> Software houses are experienced in running development operations smoothly.	<b>Cultural integration challenges:</b> Differences in company culture and practices may emerge during the transition.
<b>Lower initial risk:</b> Reduces the financial and operational risk compared to setting up a local entity from day one.	<b>Dependency on vendor:</b> Reliance on the vendor's structure and systems during the build and operate phases.
<b>Scalability:</b> Ability to quickly scale the team and operations before transferring ownership.	<b>Exit planning required:</b> BOT requires a clear and well-managed exit/transfer plan, which can be complex.
<b>Local market insight:</b> Software houses offer insights into local hiring, legal, and operational norms.	<b>Cost over time:</b> While efficient at the start, long-term cost may be higher if the transfer is delayed or complex.

Learn how Karhoo launched its  
IT hub in Poland using BOT model.

[motife.com/karhoo](https://motife.com/karhoo)



## Build, Operate, Transfer (BOT): Setting up and running a subsidiary by a partner

Build, Operate, Transfer is a model in which a team and an organization are incubated inside a vendor's organization and later transferred to the company. This option is an enhancement to the soft-landing approach, which typically requires substantial involvement from global supporting functions. In the Build, Operate, Transfer model, the engagement of the in-house staff can be reduced even more.

## Staff augmentation / Contract / Outsourcing

In this approach independent contractors provided by a partner are used. They are either recruited from the market or already available in the partner's team. They are usually fully dedicated to a client and can eventually be hired by a client. This approach provides greater flexibility, scalability and offsets all risks to a partner. It also may allow for a faster start. The downsides include the fact that the team doesn't have a sense of belonging to the client's organization and the setup may implicate compliance risks, or continuity and knowledge retention issues.

Hiring model	When recommended?	What to be careful about?
<b>Umbrella Company / EOR (Employer of Record) / PEO (Professional Employer Organization)</b>	<ul style="list-style-type: none"> <li>You are not yet sure about building a full team in Poland and want to test the approach</li> <li>When you don't have an internal capacity to handle any complex setup and want to have the ease of outsourcing, but benefits of own, dedicated team</li> </ul>	<ul style="list-style-type: none"> <li>Make sure you clarify who owns what part between the partner and your own HR team</li> <li>Do treat every person as a member of your team</li> <li>You will need to learn bits and pieces of Polish labor code or market practices</li> </ul>
<b>Hiring independent contractors directly</b>	<ul style="list-style-type: none"> <li>When you are hiring a small number of team members in Poland</li> <li>When you are hiring in multiple locations in parallel</li> <li>When you already have contractors in other locations</li> </ul>	<ul style="list-style-type: none"> <li>Effectively, you will not be building a team in Poland, it will be a group of contractors</li> <li>Loyalty and sense of belonging to an organization are more difficult to achieve</li> <li>This solution won't scale</li> </ul>
<b>Build, Operate, Transfer: Setting up and running a subsidiary by a partner</b>	<ul style="list-style-type: none"> <li>You need to have a team inside your organization and not through another organization</li> <li>You have no ability to handle the process of set up and running, even with support of a partner</li> </ul>	<ul style="list-style-type: none"> <li>You need to fully trust your partner to use this option</li> <li>Consider how to build your culture in the team outside your organization</li> <li>Consider the cost of transfer</li> </ul>
<b>Staff augmentation / Contract / Outsourcing</b>	<ul style="list-style-type: none"> <li>You want to have a team as quickly as possible</li> <li>You are not certain if you will be able to sustain the team beyond certain period of time</li> </ul>	<ul style="list-style-type: none"> <li>Make sure you have control over who is assigned to you, ideally do participate in the recruitment process</li> <li>Make sure you try as much as possible to treat the contractors as members of your team</li> </ul>

Chapter 3

# Cost of doing business in Poland

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This chapter is designed for CFOs and other decision-makers responsible for evaluating costs and formulating a business model for market entry in Poland. Within the following pages, you will find essential information about cost of running a center in Poland, such as office space, professional services, taxation, and notably, the cost of employment.

## Key figures

**25**<sub>K</sub> EUR

Average gross annual salary in the business sector in Poland

**32**<sub>K</sub> EUR

Average gross annual salary in the business sector in Krakow

**PLN**

Polish zloty  
Currency of Poland

**3.5%**

GDP growth forecast for 2026.  
EU countries average: 1.1%. Eurostat

**6.1%**

Unemployment rate in Poland in February 2026 (Krakow: 2.6%, Warsaw: 1.5%). EU average: 5.8%

**3%**

Annual Inflation rate in Poland in March 2026. EU countries average: 2.8%. Eurostat

**NATO**

member since 1999

**EU**

member since 2004 and Schengen Area member since 2007

Source: stat.gov.pl, krakow.stat.gov.pl, Eurostat



# Radosław Pituch

Manager, BSS and Tech Investments at PAIH



PAIH is a state-owned, one-stop-shop consultancy agency for investors and exporters. We have supported more than 1300 FDI projects that finalized in Poland, creating over 300 thousand new jobs. Many of these projects were IT hubs, coming from a whole range of companies – from Silicon Valley tech-giants to medium and small companies without previous investment experience.

Poland is a competitive location for IT investments, combining a transparent tax system with access to qualified specialists. At Polish Investment and Trade Agency (PAIH) we are working day-to-day with investors, informing them not only about costs but also many tax breaks, deductions and other financing instruments, that they could benefit from.

The Polish system offers several instruments reducing the effective tax burden. CIT exemptions, granted by Special Economic Zones are one of the most important support measures for new investments, offering even up to 15 tax-free years.

The R&D relief enables deduction of up to 200% of eligible costs related to software development and innovation activities. The IP BOX regime introduces a preferential 5% tax rate on income generated from qualified intellectual property rights. A key complement to these mechanisms is the relief for innovative employees, which allows companies to offset unused R&D deductions by reducing advance PIT payments on salaries of employees involved in R&D. In practice, this improves liquidity and ensures that tax benefits are accessible even at early stages of business development.

These mechanisms are supported by other instruments, such as the Programme of cash grants for new investments – a state aid program operated by Ministry of Development and Technology together with PAIH. In the IT sector it is a direct financing instrument for investment projects creating new job places. Currently, together with the Ministry, we are working on a new version of the program, even more focused on new technologies, knowledge-intensive investments and perspective sectors – with IT being in the centre. We recommend following our website [paih.gov.pl](http://paih.gov.pl) where we'll inform on any news regarding new provisions.



# Employment cost

When setting up a tech hub in Poland, the salaries of the team members hired will represent the major part of the budget. Understanding the salaries component is a key to build the right business case for "Poland project".

## Total employment cost in Poland

To assess the total annual employment cost in Poland we are using as a reference a median monthly salary of a regular engineer on an employment contract, 17 000 PLN or 4 000 EUR gross, and top it with additional employer cost, the social security contribution, to obtain the total amount.

Since apart from regular employment contracts, approximately 30%-40% of engineers choose B2B contracts, we include also the expected cost for these types of agreements.

### Permanent employment contract

**58K EUR**

Annual total cost of employment contract for a regular engineer in Poland, inclusive of social security

### B2B contract

**50-58K EUR**

Annual total cost of employment on B2B contract for a regular engineer in Poland

The total employment cost will consist of the annual gross salary, topped with the social security contribution paid by the employer (on average 20%). B2B contract The total cost of employment on B2B doesn't include the social security contribution for B2B contractors as it is entirely at the charge of the contractor.

## Real employer cost breakdown



### Employment Contract (UoP)

**Non-statutory benefits**  
~150 EUR/month

**Employer social security**  
+19-22% on top of Gross  
ZUS Taxes (Pension, Disability)

**Gross salary**  
Base compensation



### B2B Contract

**Non-statutory benefits**  
~150 EUR/month

**Total invoice amount**  
Gross Salary + ~10-15% premium  
Includes all costs in one rate

# Beyond employment cost

The part of the budget beyond employment costs differs depending if you have your own subsidiary or employing through an umbrella company or Employer of Record (EOR).

The umbrella company model simplifies the setup. The primary expenses include the cost of employment, the provider's mark-up, and recruitment cost. There might be additional expenditures if you opt for benefits, office space, or equipment.

Setting up your own subsidiary offers more control but also involves a broader range of costs. These include the cost of employment, benefits, supporting functions, recruitment, and equipment. Depending on your needs, you may also need to factor in office costs.

When operating your own entity, it's also essential to factor in the obligations associated with transfer pricing. Most companies use a cost-plus model to comply with tax regulations in Poland. This means that a minimal profit, referred to as a mark-up, is generated in the country. This overhead can be recovered in the form of dividends from your Polish entity.

## 70%

Approximate average portion of the cost of running an IT Hub Poland that goes to the employment cost and benefits

## 30%

This is an approximate average amount that goes to cover supporting functions cost, recruitment, office, equipment

## 7%

A typical mark-up used in the cost-plus model added to the total cost of IT Hub Poland cost in order to conform with transfer pricing obligations



# Professional services

**1.5<sub>K</sub> EUR**

Monthly cost of accounting and payroll services for a small limited liability company

Operating in Poland requires compliance with a well-established legal and regulatory framework. Key areas include employment law under the Polish Labour Code, corporate governance regulated by the Commercial Companies Code, and taxation, covering CIT, VAT, and social security contributions. Business activities are also governed by the Civil Code, which defines contractual relationships and general legal principles.

**500<sub>EUR</sub>**

Yearly cost of insurance (hardware, liability) for a small limited liability company

Given this complexity, companies entering the market typically rely on external providers for core administrative functions such as accounting, payroll, and legal support. These services are widely available, helping optimize operational costs. At the same time, local providers are experienced in supporting international businesses, ensuring efficient compliance and alignment with cross-border requirements. When selecting an accounting and payroll vendor in Poland, both local companies and large international firms are available options. Although larger firms may cost two to three times more than smaller vendors, they offer a broader range of services. These large firms bring extensive experience with sizable organizations and generally provide more consistent fluency in English.

**50-100<sub>EUR</sub>**

Hourly fee for legal services

# Taxes in Poland

There are 3 primary taxes that a company pays in Poland: The Personal Income Tax (PIT) paid by companies for their employees by deducting it from their salaries, the Value-Added Tax (VAT), and the Corporate Income Tax (CIT).

## Corporate Income Tax (CIT)

Corporate Income Tax (CIT) is a direct tax applied to the profits of legal entities operating in Poland. It is calculated based on income after deducting eligible business costs. Companies are required to make advance payments on a monthly or quarterly basis and submit an annual tax return to settle the final liability.

CIT applies to Polish legal entities, such as limited liability and joint-stock companies, as well as foreign companies operating through a local subsidiary. The standard tax rate is 19%, while a reduced rate of 9% applies to companies with annual revenue below EUR 2 million.

## Personal Income Tax (PIT)

Personal Income Tax (PIT) is a direct tax levied on income earned by individuals. It covers employment income, B2B contracts, and other sources of personal earnings. In the case of employment, PIT is deducted monthly by the employer and transferred to the tax authorities, with an annual reconciliation completed by the individual.

PIT applies to individuals earning income in Poland, including both residents and non-residents, depending on their tax status. The tax is calculated progressively, with a rate of 12% applied to annual income up to PLN 120 000 (approximately EUR 28 000), and 32% for income exceeding this threshold.

## Value-Added Tax (VAT)

Value-Added Tax (VAT) is an indirect tax applied to the sale of goods and services. It is collected at each stage of the supply chain and ultimately borne by the end consumer. Businesses act as intermediaries, collecting VAT from customers and remitting it to the tax authorities.

VAT is typically reported and paid on a monthly basis, although some companies may qualify for quarterly settlements. The standard VAT rate in Poland is 23%, applied to most goods and services.

# CIT

## Corporate Income Tax

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9% for companies with  
<2M EUR annual revenue  
and 19% over that threshold

# PIT

## Personal Income Tax

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12% under 120K PLN (~28K EUR)  
annually, and 32% over  
that threshold

# VAT

## Value-Added Tax

---

23% standard VAT rate

# MOTIFE

## Aleksandra Chłodnicka

Finance Controller at MOTIFE



Companies considering opening IT hubs in Poland often ask about tax regulations and the implications of having a team here. In practice, however, tax law itself is rarely the main challenge. What matters far more is how financial and tax processes are designed locally from the very beginning.

When international companies establish a presence in Poland, they often encounter a kind of “operational culture clash.” Poland operates within a highly formalized, process-driven tax environment, where rules are strict and must be followed with precision. Organizations that rely on centrally standardized processes, global ERP systems, and unified accounting models often try to apply these global frameworks directly to their Polish entity. They are then surprised to find that local regulations require tailored processes and that global standards cannot simply be replicated without adjustments.

VAT is a good example. It’s not just about applying the correct rate. The system requires

strict documentation, consistent accounting processes, and accurate electronic reporting. Even minor formal errors can result in VAT being non-deductible, directly impacting financial performance.

Corporate income tax introduces another layer of complexity. From a business perspective, many expenses may seem clearly operational. However, under Polish tax rules, not every business expense automatically qualifies as tax-deductible. This is why the financial model should be designed with local tax implications in mind from the market entry stage.

Transfer pricing is another area that companies often underestimate. Many groups initially treat their Polish entity as a cost center. Over time, however, the Arm’s Length Principle applies. A local entity is expected to generate a market-level profit, which will ultimately be taxed in Poland. In our experience at MOTIFE, successful market entry is less about tax optimization and more about building the right financial architecture. When global standards are aligned with local regulatory requirements from the outset, companies can avoid operational friction and create a much more stable foundation for growth.

## Start a conversation on entity setup in Poland.

[motife.com/meeting](https://motife.com/meeting)



# Incentives and support programs in Poland

This section outlines the key financial and tax incentives available to companies establishing or expanding operations in Poland. It is designed to support decision-makers in evaluating how public instruments can reduce operational costs, improve investment efficiency, and strengthen long-term ROI.

Category	Program	Scope of benefit	Key parameters
CIT	Polish Investment Zone (PSI)	CIT exemption on income from new investment	5-10 years; up to 40-70% of investment or 2-year labor costs
	R&D Tax Relief	Additional deduction of eligible R&D costs	Up to 200% of costs (incl. IT salaries)
	IP Box	Preferential taxation of IP income	5% CIT rate; requires substance
	Innovation Relief for Employees	Offset unused R&D relief via payroll taxes	Applies to employees engaged $\geq$ 50% in R&D
	Estonian CIT	Deferred taxation model	Tax paid only on profit distribution
PIT	Polish Investment Zone (PSI)	PIT exemption for eligible investments	Same structure as CIT PSI
	R&D Relief	Additional deduction of R&D costs	Up to 200% of eligible expenses
	IP Box	Reduced tax on IP income	5% PIT; requires detailed tracking
Grants	SMART Path (FENG)	Direct funding for innovation projects	Up to 80% cost reimbursement
Training	National Training Fund (KFS)	Co-financing of training & certifications	70-90% funding; caps per employee/employer

Source: MOTIFE Insights 2026, Krakow Technology Park, PwC, GUP



# Grzegorz Kuś

Partner, Grants and Incentives  
at PwC



Poland remains one of the key locations for investors developing IT centres, R&D operations and advanced business hubs in Europe. The market's attractiveness is driven not only by strong operational fundamentals, including access to skilled talent, a mature ecosystem and cost competitiveness, but also by the opportunity to leverage a wide range of support instruments for investment and innovation.

In the current economic environment, effective investment planning requires a comprehensive view of the operating model. For decision-makers, this means assessing not only the location and scale of the project, but also the available solutions that can improve the financial efficiency of the undertaking, support growth and provide greater resilience for the long-term operating model.

From the perspective of organizations establishing or expanding their operations in Poland, the right approach to incentives can constitute an important element of competitive advantage. This applies both to new investments and to projects related to the expansion of existing structures, the development of innovative activities or the transformation of the operating model.

On the following two pages we outline the tax incentives worth considering when making investment decisions in order to fully capture the potential offered by Poland's business and regulatory environment.

# Tax incentives

## Tax-Deductible Costs (TDC) for IT professionals

The Polish Personal Income Tax Act allows for special tax-deductible rates for authors of copyrighted works. If they receive a remuneration for the transfer of the copyright, they may apply tax-deductible costs in the amount of 50% of a portion of earned income. This scheme is sometimes also informally referred to as „creative tax”.

The scheme has gained popularity throughout the IT industry. Both smaller IT firms and large international software companies with 1 000+ employees utilize its benefits.

In terms of benefits, the TDC scheme allows employees to reduce their personal income tax

and therefore increase their net income. Without increasing employer costs, the employee's net income can increase by as much as 13% per year. As an alternative, some employers use the TDC scheme to reduce the cost of salaries, by offering lower gross compensation but still an attractive net compensation.

Implementing the TDC scheme in an organization requires a thorough process that can take up to 6 months and the support of a local partner and legal verification. The cost of necessary legal services has to be taken into account when planning.

## IP Box tax relief for IT businesses

Introduced in 2019, the IP Box tax relief encourages innovation by implementing a preferential 5% tax rate on income derived from eligible intellectual property (IP) rights. This incentive is accessible to entrepreneurs, partnerships, and corporations. Unlike Creative Tax mentioned earlier, IP Box specifically targets businesses, therefore applies to the sole entrepreneurs operating under B2B contracts and not the individual salaried employees.

The IP Box relief is particularly relevant for software developers. The basic requirement that a taxpayer must meet in order to take advantage of the IP Box is to conduct research and development activities that have led to the creation, development, or improvement of qualified intellectual property.

Developers can benefit from the relief when they transfer intellectual property rights to developed applications or source code. To claim IP Box relief, taxpayers must separately identify each qualified IP right and maintain separate records for each type of right. The relief can only be claimed in the annual tax return, accompanied by a specific PIT/IP or CIT/IP attachment, which indicates the portion of income subject to the 5% tax rate.

## Tax relief for Research and Development (R&D)

Tax relief for R&D is a fiscal advantage for entrepreneurs. It allows them to deduct specific R&D-related costs from their taxable income. This deduction reduces the taxes they owe, making R&D projects financially attractive.

Eligible R&D costs can be deducted twice. First, they are removed as operating expenses (100%). Then, the same amount (100%) is deducted from revenue. This results in a total deduction of 200%. The tax relief is available to all entities engaged in R&D. It covers both Corporate Income Tax (CIT) and Personal Income Tax (PIT) payers.

Businesses must participate in R&D throughout the tax year. They must also document all related expenditures carefully.

Eligibility for this relief does not depend on the success or innovation level of the R&D efforts. Projects in progress, even if started in previous years, are eligible.

A special provision applies to entities in a Polish Investment Zone (PIZ) with a support decision, allowing them to benefit from the R&D tax relief. However, they cannot classify eligible R&D costs as expenses for activities supported by the PIZ decision. This stipulation ensures that businesses can optimize their tax benefits while complying with regulatory guidelines, promoting sustained investment in innovation and development.

## Income tax break from the Polish Investment Zone (PIZ)

The Polish Investment Zone program offers options for CIT tax breaks for companies who set up their operations in Poland. Tax break depends on company size, following the European Commission's guidelines: large enterprises get a 40% break, medium-sized 50%, and small/micro 60%, as applicable in Krakow. To qualify, companies must meet a minimum investment outlays/costs and adhere to criteria promoting sustainable growth.

The tax break can be granted to services sector companies, including IT services, research and development in natural and technical sciences, bookkeeping and book control, accounting services (except tax statements), research and technical

analysis services, call center services, architectural and engineering services, as outlined in the New Investment Support Act.

For companies seeking to benefit from the Polish Investment Zone (PIZ) incentives, the application process involves obtaining a Support Decision, issued on behalf of the Minister of Economic Development and Technology, by the management of one of the 14 Special Economic Zones located in Poland.

# Simulation of gains from public incentives

This section presents an illustrative model of the financial incentives available to companies establishing and scaling an IT hub in Poland, based on a Krakow (Malopolska) scenario. It outlines the potential value derived from key instruments, including R&D tax relief, Polish Investment Zone (PSI) exemptions, and training subsidies, under a defined set of operational assumptions.

**Key assumptions:** Malopolska (Krakow) location; 40% PSI aid intensity (large enterprises); average IT salary ~EUR 4 000/month (~PLN 20.6K employer cost); annual cost per employee ~PLN 247K; PSI base (2-year labor cost) ~PLN 494K per employee; 80% of time allocated to R&D.

The following calculations show how companies can benefit from **either** R&D tax relief **or** the Polish Investment Zone (PSI), depending on their investment structure

Year and scale of employment	Annual savings on CIT (B+R relief)*	Training funds (KFS - 70% limit)**	CIT exemption limit (PSI)***
<b>Year 1: 30 employees</b>	30 people x 247 200 PLN x 80% x 200% x 19% <b>= 2 254 464 PLN</b> <b>(CIT exemptions)</b>	Max funding from KFS: 8 x 9 135.69 = 73 085.52 PLN Company share: 73 085.52 x 0.3/0.7 = <b>31 322.37 PLN</b>	30 people x 494 400 PLN = 14 832 000 PLN 40% x PLN 14 832 000 = <b>5 932 800 PLN</b> <b>(CIT exemptions)</b>
<b>Year 2: 100 employees</b>	100 people x 247 200 PLN x 80% x 200% x 19% <b>= 7 514 880 PLN</b> <b>(CIT exemptions)</b>	Max funding from KFS: 12 x 9 135.69 = 109 628.28 PLN Company share: 109 628.28 x 0.3/0.7 = <b>46 983.55 PLN</b>	70 people x 494 400 PLN = 34 608 000 PLN 40% x PLN 34 608 000 = <b>13 843 200 PLN</b> <b>(CIT exemptions)</b>
<b>Year 3: 200 employees</b>	200 people x 247 200 PLN x 80% x 200% x 19% = <b>15 029 760 PLN</b> <b>(CIT exemptions)</b>	Max funding from KFS: 12 x 9 135.69 = 109 628.28 PLN Company share: 109 628.28 x 0.3/0.7 = <b>46 983.55 PLN</b>	100 people x 494 400 PLN = 49 440 000 PLN 40% x PLN 49 440 000 = <b>19 776 000 PLN</b> <b>(CIT exemptions)</b>
<b>Year 5: 300 employees</b>	300 people x 247 200 PLN x 80% x 200% x 19% = <b>22 544 640 PLN</b> <b>(CIT exemptions)</b>	Max funding from KFS: 14 x 9 135.69 = 127 899.66 PLN Company share: 127 899.66 x 0.3/0.7 = <b>54 814.14 PLN</b>	200 people x 494 400 PLN = 98 880 000 PLN 40% x PLN 98 880 000 = <b>39 552 000 PLN</b> <b>(CIT exemptions)</b>

\* Potential tax savings. The actual benefit depends on the tax result for the year.

\*\*Average salary 02/2026: 9 135,69

\*\*\*The actual benefit depends on the tax result for the year

Source: PwC, Krakow Technology Park, GUP



# Justyna Czyszek

Investor support department  
Vice-Director at KPT



Poland offers a competitive and transparent framework for doing business, supported by a wide range of investment incentives. One of the most important instruments available to investors is the Polish Investment Zone (PIZ), a nationwide incentive scheme designed to stimulate new investments and support the expansion of existing companies.

Under the program, companies undertaking new projects can obtain corporate income tax (CIT) exemptions of up to 70% of eligible investment costs, which may include two-year labour costs of new employees. The level of support depends on the size of the enterprise and the location of the investment - contact us directly to obtain detailed information relevant to your projects. Importantly for technology firms, the program covers modern business services, software development and R&D activities.

A simplified example illustrates the scale of support. If an IT company establishes a new project in Krakow and spends around PLN 5

million on employment over two years, this would typically correspond to hiring roughly 12 IT specialists, assuming an average employer cost of about PLN 18 000 per month per employee. In such a case, the company could obtain a CIT tax exemption covering 40–60% of the two-year employment costs, translating into approximately PLN 2–3 million in tax relief.

Recent investors from the technology sector benefiting from the program include Tanium, which has established a cybersecurity Centre of Excellence in Krakow and is benefiting from the Polish Investment Zone while expanding its team of technical specialists. Another example is QPL Technologies, part of the Qualtrics Group, a developer of Experience Management (XM) software delivered in the SaaS model that enables organizations to analyse feedback from customers and employees and improve operational performance. QPL supports the development of these solutions from its Krakow operations.

The Polish Investment Zone significantly reduces operational costs and reinforces Krakow's position as a leading destination for expansion in Europe. KPT supports investors throughout the process of obtaining and using these incentives.

# Office market in Poland

In collaboration with CBRE

## 13 MLN m<sup>2</sup>

Total office space surface  
in Poland

## 27.8 EUR m<sup>2</sup>

Lease per 1 m<sup>2</sup> of office  
space/month in an A-class  
building in Warsaw center

Improving macroeconomic conditions and low supply translate into a growing demand for high-quality space. Tenants' sentiment and their decisions regarding relocation or expansion are also increasingly optimistic. In response to growing demand, we expect an increase in the supply of new offices.

Nevertheless, developers need to be careful in their investment plans, and the limited availability of plots in the city center will force renovation or demolition of existing buildings to make way for new offices. The continued high interest in offices in prime locations will continue to characterize the market, but we will see increasingly selective approaches. Due to the low availability of offices, especially in central business areas (CBD), rents in top locations will increase. The so-called "second best locations", offering lower rents in more peripheral districts of cities, will become an alternative, and perhaps even a necessity.

The growing demand for office space from startups and companies in the AI sector, which prefer shorter lease agreements, will make buildings in the second lease cycle and flexible space more attractive. This, in turn, will affect the demand for both stabilized buildings in top locations and new investments in city centres, driving the growth of the office market in 2026.



## Office space resources

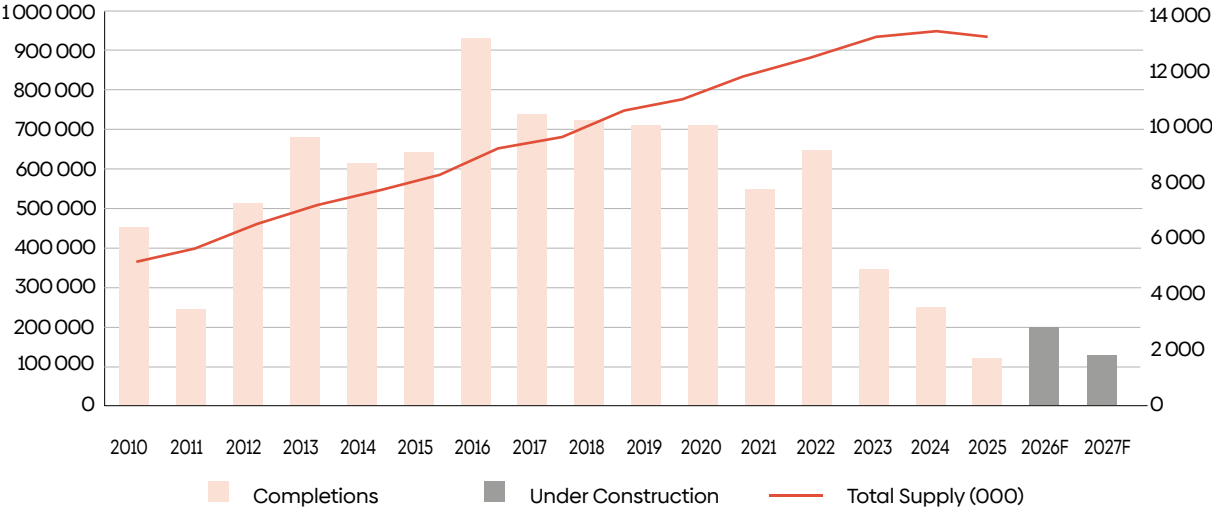
At the end of Q4 2025, the total supply of modern office space in Poland amounted to 13 million sqm, including 6.7 million sqm in regional cities. In 2025, regional city office stock increased by only 20 500 sqm, marking the lowest annual volume of new supply since 2005, while no new office buildings were delivered in Warsaw in Q4, and 88 700 sqm had been delivered during the first three quarters of the year.

At the end of Q4 2025, Warsaw had nine office projects under construction, totaling approximately 193 700 sqm, along with three significant refurbishment projects accounting for 37 000 sqm. Approximately 90% of all construction activity is concentrated in the city’s central zones, reflecting the continued shift toward modernization of existing buildings and limited availability of development plots in core areas. Developer caution persists, keeping the pipeline small despite continued demand pressures.

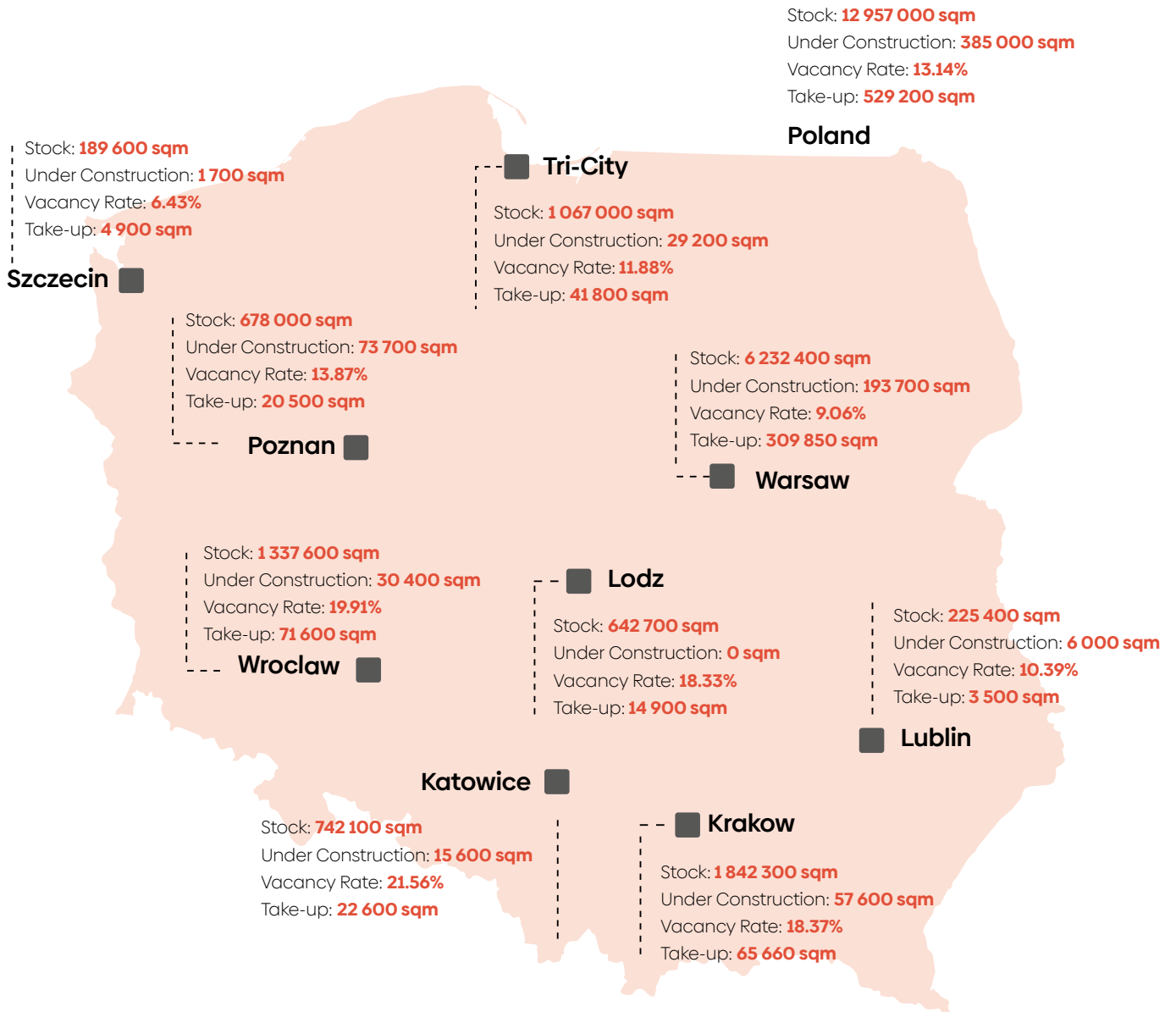
The supply gap in Warsaw remains visible, with central-zone vacancy at just 6.1% compared to 11.6% in non-central locations. While this presents opportunities for new development, high construction costs and macroeconomic uncertainty continue to slow decision-making by developers.

In Krakow, the development pipeline for 2026 remains modest, reflecting the broader slowdown in regional construction activity. Four office buildings in three projects are scheduled for delivery this year. The first is Wita Stwosza B&C, developed by Echo Investment, offering 18 700 sqm of office. The second is Soneta, a smaller project totaling 8 600 sqm, and the third one is Fabryczna (building B7) with 8 700 sqm. Together, these developments will add 36 000 sqm of new office space to the Krakow market in 2026, underscoring the city’s continued but cautious growth amid a shrinking regional pipeline.

## Office stock evolution in Poland (in m<sup>2</sup>)



## Office space overview in the 7 largest cities in Poland



Source: CBRE, Q1 2025

## Lease costs

By the end of 2025, rental growth in Warsaw and most major regional cities has continued to decelerate. In Krakow, developers' activity is still limited and vacancy levels steadily declined, upward pressure on rents is likely to intensify further. As a result, high-quality A-class offices in the most desirable areas are becoming difficult to secure.

## Demand for office space

Demand for office space in Poland remained robust throughout 2025, exceeding the levels recorded in the previous year and confirming the market's continued recovery. Across the country, total leasing activity in 2025 reached over 1 567 500 sqm, combining 794 130 sqm leased in Warsaw and 773 400 sqm in regional cities. This marks a higher level of tenant activity compared to 2024, confirming that demand has not only recovered but remains structurally strong.

In regional cities, tenant activity reached 773 400 sqm, representing an 8% increase year-on-year and the strongest result since the post-pandemic rebound. The most active markets were Wroclaw (175 600 sqm), Krakow (270 000 sqm) and Tricity (113 800 sqm) – continuing their role as the primary regional business hubs. Krakow alone accounted for around 12% of total national demand in 2025.

Although the regional-market pipeline slowed significantly, occupier activity remained relatively high. Tenant activity in regional markets equaled 49% of the total volume recorded highlighting the continued attractiveness of major regional cities as office locations.

In Warsaw, total leasing activity amounted to 794 130 sqm in 2025, surpassing the levels observed in 2024. The strongest submarkets were City Centre West (180 300 sqm) and Sluzewiec (180 000 sqm), which together accounted for almost half of all leases signed in the capital.

A prominent theme throughout 2025 in Warsaw was the continued centralization of tenant demand. Central areas accounted for 46% of total leasing activity, supported by the concentration of modern, high-quality office buildings and limited availability of new supply. Despite a tight market, tenants continued to display a willingness to relocate, driven largely by “flight-to-quality” motivations.

Across Poland, the overall structure of leasing activity in 2025 also reflects stable market confidence, with healthy levels of new deals, renewals, and expansions. The strong leasing volumes in both Warsaw and the leading regional hubs demonstrate that office space remains a key component of corporate strategies – even as occupiers continue to optimize space and upgrade building quality.

## Demand for office space in Poland (in m<sup>2</sup>)



Source: CBRE, 2025

**CBRE**

# Mariusz Wiśniewski

Director, Head of Regional Markets  
at CBRE



Strong demand and solid GDP growth are setting the tone for 2026, a year in which the office market will be shaped by bold tenant decisions and the rising value of prime locations. The year 2025 demonstrated that, as macroeconomic conditions improved and companies regained financial stability, demand for high-quality office space increased, particularly in markets where new supply remains limited. This is a natural consequence of a structural supply gap, further reinforced by cautious developer activity.

Tenants are increasingly focusing on offices that genuinely support organizational effectiveness, offering high technical standards, well-designed architecture and flexibility in space planning. Workplace quality, including comfort, lighting, acoustics and air quality, has become a core criterion in leasing decisions. In 2025, these factors often determined demand patterns, especially in the most desirable central locations.

As a result, the modernization and revitalization of older buildings once again became a viable alternative to new developments. Across several key cities, we observed heightened interest in assets that, despite their age, offer strong locations and meaningful potential for technical upgrades. Rising rental pressure in prime areas, combined with limited availability, encouraged investors to consider refurbishment strategies while retaining office use.

From a national perspective, 2025 reaffirmed the strong position of Polish metropolitan areas, with Warsaw standing out in particular. Supported by the dynamic growth of the IT and business services sectors, Polish cities continue to strengthen their role in the region, and Warsaw is expected to remain one of the fastest-growing urban economies in Europe. This advantage increasingly stems from expanding talent pools, the ability to attract high-value investment and the consistently improving appeal of local office markets.

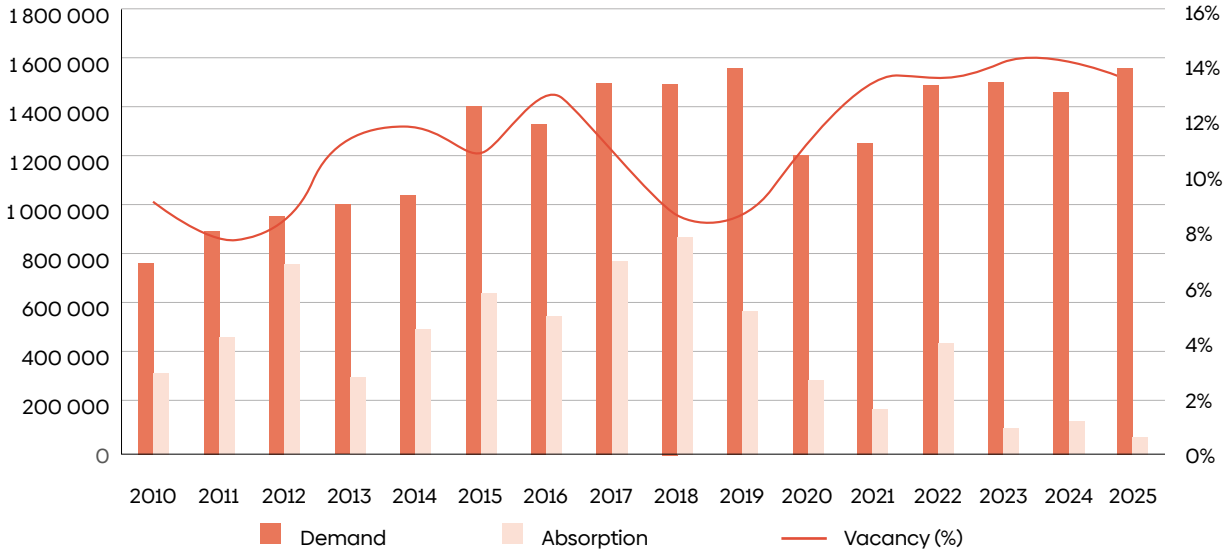
### Availability of office space

At the end of 2025, modern office space available for immediate lease in regional cities totalled 1 138 900 sqm, representing 16.9% of the regional stock, while Warsaw recorded 564 700 sqm of vacant space, equal to a 9.1% vacancy rate. Vacancy levels continue to vary significantly by location: among regional cities, Katowice reported the highest vacancy rate at 21.6%, whereas Szczecin recorded the lowest at 6.4%. In Warsaw, the gap between submarkets remains pronounced, with vacancy at 6.1% in central zones compared to 11.6% in non-central areas.

As the supply gap persists in Warsaw, availability of prime office space in key central zones such as City Centre West (CCW) and the Central Business District (CBD) remains extremely limited. This scarcity continues to put upward pressure on rents, reaching up to EUR 27.75/sqm/month in the CBD and is prompting some occupiers to consider pre-letting options, as well as refurbished or older buildings that can meet modern standards.

Across most markets, developer activity remains subdued. Many cities are focused on absorbing recently completed supply, and while vacancy levels had risen in previous years, signs of stabilization emerged in 2025. In regional cities, the sharply reduced pipeline is already contributing to a shortage of high-quality space, particularly in the most desirable locations. In Warsaw and selected major regional markets, developers are increasingly turning to refurbishments, adaptive reuse, and sustainability-driven upgrades, responding to evolving occupier expectations and competitive pressures.

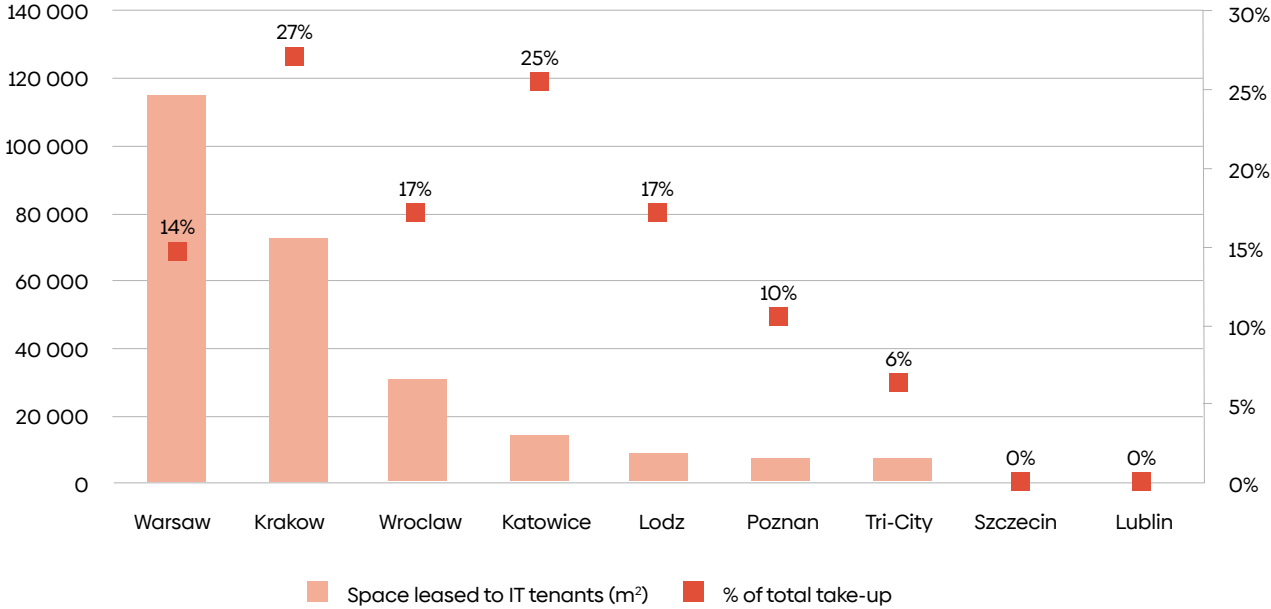
### Main market indicators in Poland (demand, absorption, vacancy rate)



Source: CBRE, 2025

In 2025, Warsaw remains the largest IT leasing market in absolute terms, reflecting the capital's role as a broad, diversified business hub. However, Krakow stands out with a significantly higher share of IT in total take-up, confirming its position as the most IT-driven office market in the country. Together, the two cities illustrate contrasting dynamics: Warsaw's strength comes from scale and sectoral diversity, while Krakow continues to attract a particularly strong concentration of IT tenants.

### IT sector's share in take-up in 2025 by city



Source: CBRE, 2025



# MOTIFE

## Marcelina Polak

Marketing Lead at MOTIFE



The 7th edition of the Krakow IT Market Report captures another stage in the growth and evolution of the city's technology ecosystem. Over the years, Krakow has developed from a strong delivery location into a mature business and technology hub, supported by global companies, local firms, universities, start-ups, research institutions, public stakeholders, and an active professional community.

This report was created to serve two roles. For international companies and potential investors, it offers a comprehensive guide to the local market, covering talent, employers, salaries, business costs, office space, education, innovation, and the wider operating environment. For the Krakow community, it is also a way to give back by providing a shared, data-driven picture of the ecosystem and its direction.

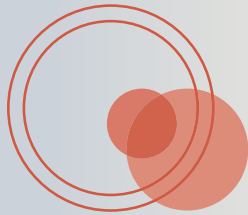
As Krakow enters its next phase, closer cooperation between business, academia, science, public institutions, and community organizations will be essential to sustain its development as a European technology and innovation hub.

At MOTIFE, we see this ecosystem every day through our work with companies entering, scaling, and operating in Krakow. We have supported over 50 organizations from Europe, the US, Asia, and the Middle East in building their local presence, from recruitment and HR to operational setup and long-term growth. This experience gives us a practical view of both the opportunities and the challenges that shape the market.

We hope this edition contributes to a more connected and informed Krakow tech scene, supporting the conversations, partnerships, and long-term decisions that will shape the market's next phase. We would also like to thank all data contributors, experts, partners, and the MOTIFE team whose input, knowledge, and work made this report possible.

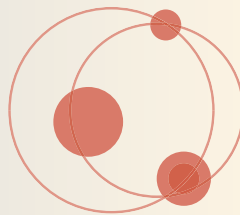
# About MOTIFE

## A one-stop shop for building IT Hubs in Poland



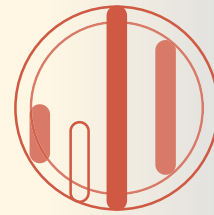
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- Recruitment
- Executive search
- Recruitment Process Outsourcing (RPO)



### Staff Augmentation & EOR

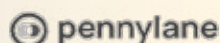
- IT staff augmentation
- Employer of Record (EOR)
- B2B contractor hiring



### Softlanding: Setup & Back-office Operations

- Nearshoring advisory
- Entity and operations setup
- Office setup
- Entity back-office operations

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Planning a Poland hub? Let's talk.



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Share your thoughts, suggestions or questions by writing to [hello@motife.com](mailto:hello@motife.com)

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