



Polish Investment
& Trade Agency
PFR Group

THE INFORMATION & COMMUNICATION TECHNOLOGY SECTOR

Poland. Business Forward



Poland is an internationally acclaimed destination for:



Pristine nature
A top 10 country to visit according to Lonely Planet



A place where East meets West
Dynamic business hub at the heart of Europe



Vibrant food scene
Warsaw among Top 10 Vegan-Friendly Cities in the World



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



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



Rich history
Vast legacy of bravery and resilience



WHY
POLAND



FACTS ABOUT
THE POLISH ICT
SECTOR



WHAT MAKES
US DIFFERENT



DID YOU KNOW
THAT



SUPPORT
INSTITUTIONS



HOW WE CAN
HELP YOU

Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019

Superb market share

40% of the region's total GDP and a gateway to the wider EU market

Large, high-quality talent pool

300k+ of well-educated graduates annually

Resilient economy

Max score for Macroeconomic Stability in the Global Competitiveness

Almost 30 years of continuous growth

Almost 10 years of stable growth in foreign trade turnover

Transparent

Regional leader in the Transparency International Corruption Index

FDI magnet

2nd in the EU, 5th in the world in terms of value of new greenfield projects (2020)

One third of all FDI stock in the region

Top-notch infrastructure

1st in CEE in Airport Connectivity & Quality of Road Infrastructure
(Global Competitiveness Report)

Ratings remain high despite the turbulent Times

Moody's: A2, S&P: A-, Fitch: A-, as of the first half of 2022

Competitive, well-developed cities

European Cities of the Future (fDi Intelligence)

Warsaw: 7th position (ahead of Berlin and Stockholm)

Kraków: 2nd in EU in Business Friendliness among Large Cities



FACTS ABOUT THE POLISH ICT SECTOR



2nd place in the IT Competitiveness Index

The Index released by Emerging Europe, gives a regional overview of the IT sector, available talent, IT infrastructure, economic impact and current business environment as well as room for potential growth



Digital leader in the CEE region

The largest digital economy in Central and Eastern Europe, worth an estimated €44bn in 2021



Large talent pool

550,000 specialists ranks Poland fourth in the European Union in terms of access to ICT specialists



Potential for the digital economy is growing

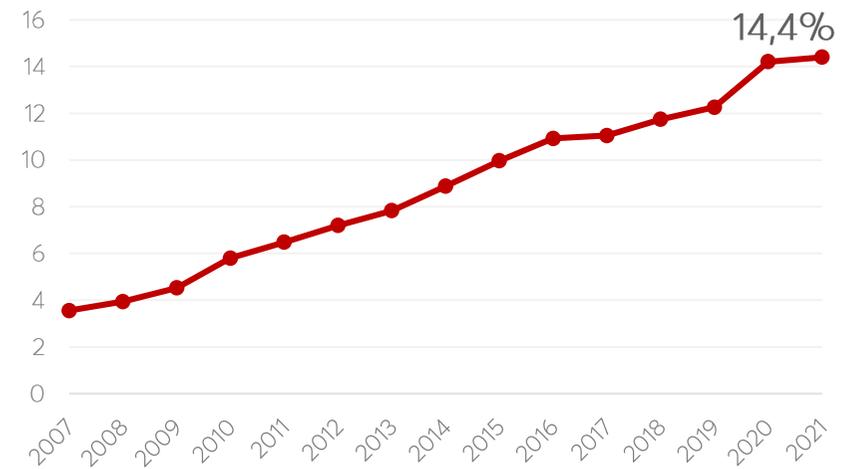
By 2023 the Polish digital economy may be worth in total €123bn, which will account for 9% of Poland's forecast GDP



The IT market is growing in strength

At the end of 2021, the IT market was an estimated 4.1% of Poland's GDP and is expected to reach 4.5% in 2025

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



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

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

Sources:

The World Bank, *Cloud 2030*, McKinsey&Company report, www.trade.gov – *Digital Technologies in Poland*, Emerging Europe – FUTURE OF IT REPORT 2022

WHAT MAKES US DIFFERENT

A land of smart people

We have one of the best-educated populations in the EU, with 32.4% of us having a qualification from an institute of higher education, according to the World Population Review.



Competence in English – no problem!

The majority of Polish programmers boast higher education. In addition, Poles have an excellent command of English (597 points in the English Proficiency Index).

An environment of development for programmers

Poland has the largest pool of technology talent in Europe, with more than 295,000 programmers.

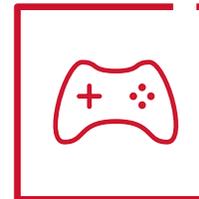


We dive into digital

More than 90% of documents in Poland can already be confirmed with a digital personal signature. Government estimates indicate that by 2026, 9 out of 10 Poles will have an ID card with a digital layer.

Recognized as one of the best

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



Gaming-geeks

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

Sources:

<https://bridgeteams.com/blog/which-country-has-the-best-developers-in-2022/>

<https://magichire.co/blog/it-job-market-overview-poland/>

<https://integratedsolutions.pl/rynek-ict-w-polsce-wg-computerworld-top200/>

DID YOU KNOW THAT



Offshore business services destination

Poland is considered one of the leading countries for offshore business services in the world (according to Statista).



One of the most promising IT sectors

We are ranked as the 7th IT sector in Europe with the most prospects . Annual revenue in 2022 was as high as €8.8bn.



An absorptive job market for developers

The software development industry in Poland currently employs 88,636 people.



More and more software companies

There are currently more than 63,000 software development companies in Poland, indicating a 6% increase from 2021.

Sources:
Emerging Europe, The future of IT landscape report
<https://www.ibisworld.com/poland/industry-statistics/software-development/3595/>

SUPPORT INSTITUTIONS



Digital Affairs – The Chancellery of the Prime Minister



PARP

Develops Polish entrepreneurship through innovation and discovering new directions of development



NCBR

A Government institution overseeing the development of innovativeness



Startup Poland

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



Software Development Association Poland

Supports and integrates Polish software companies



Digital Poland Foundation

Turns digital challenges into opportunities for the Polish economy

The Polish Investment and Trade Agency

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

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

How we can help

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



Information packs
macroeconomic, HR,
legal, sectoral data



**Analysis
of export
potential**



**Preparing
information
packs**



**Verifying
business
partners**



**Organising
business
missions**



**Preparing lists
of possible
business partners**



**Organising
B2B meetings**



**Support in contacts
with Government
Agencies**

Contact us

The Polish Investment & Trade Agency

Krucza St. 50
00-025 Warsaw

NIP: 526-030-01-67
KRS: 0000109815

Contact FORM:



Service PAIH24: +48 22 334 99 55
Contact PAIH24: paih24@paih.gov.pl

Social media:



Polish Investment
& Trade Agency
PFR Group

Strategy and Business Promotion Department,
September, 2022



Polish Investment
& Trade Agency
PFR Group

Poland. Business Forward