

MOTIFE

# Krakow IT Market Map – Q1 2024

Community partners:





# MOTIFE Krakow IT Market Map

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# Introduction

Last September we launched a survey of Krakow IT employers with an intention to build an up-to-date view of the ecosystem. As a result we have collected data from 115 companies representing 60% of the market's talent.

Then, our Insights team followed with a research intended to reach 80% of the coverage of Krakow's talent pool by adding more companies to the dataset.

As a result, we were able to create a map of Krakow IT market: a dataset containing figures describing the companies and the talent pool.

What we are sharing today, is the result of our work: the data presented in a form of a concise mini report. This publication is complementary to our Krakow IT Market Report and it focuses on the ecosystem's data.

The survey conducted would not have been possible without our partners who promoted the initiative and helped us gather the data: ASPIRE, ABSL, OMGKRK as well as Krakow Technology Park.

Enjoy this 1st edition of the Krakow IT Market Map!

**Michał Piątkowski**  
CEO at MOTIFE



# Methodology

321

Companies researched

43.5k

IT specialists mapped

80%

IT talent pool mapped

## Two main data sources:

### 1) Krakow IT Market Map survey

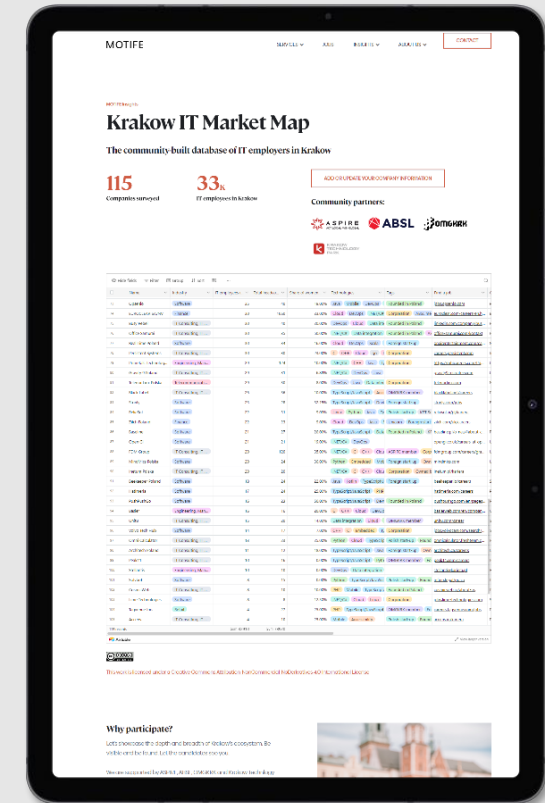
The Krakow IT Market Map survey, conducted in September and October 2023, provided companies employing IT specialists in Krakow with an opportunity to submit information such as their size or industry. The survey was open to companies of all sizes.

The survey was open to companies of all sizes.

The 115 companies that participated, shared data about their IT function. The data was verified by the MOTIFE Insights Team before being published on the project webpage.

### 2) MOTIFE Insights research

In order to draw a comprehensive picture of the Krakow IT Market, the MOTIFE Insights Team researched an additional 208 companies employing IT specialists. The team used resources available publicly, such as national companies register, statistical office, LinkedIn, career sites, increasing the number of companies the dataset to 321, resulting in the largest IT headcount tracker released in our city to date.

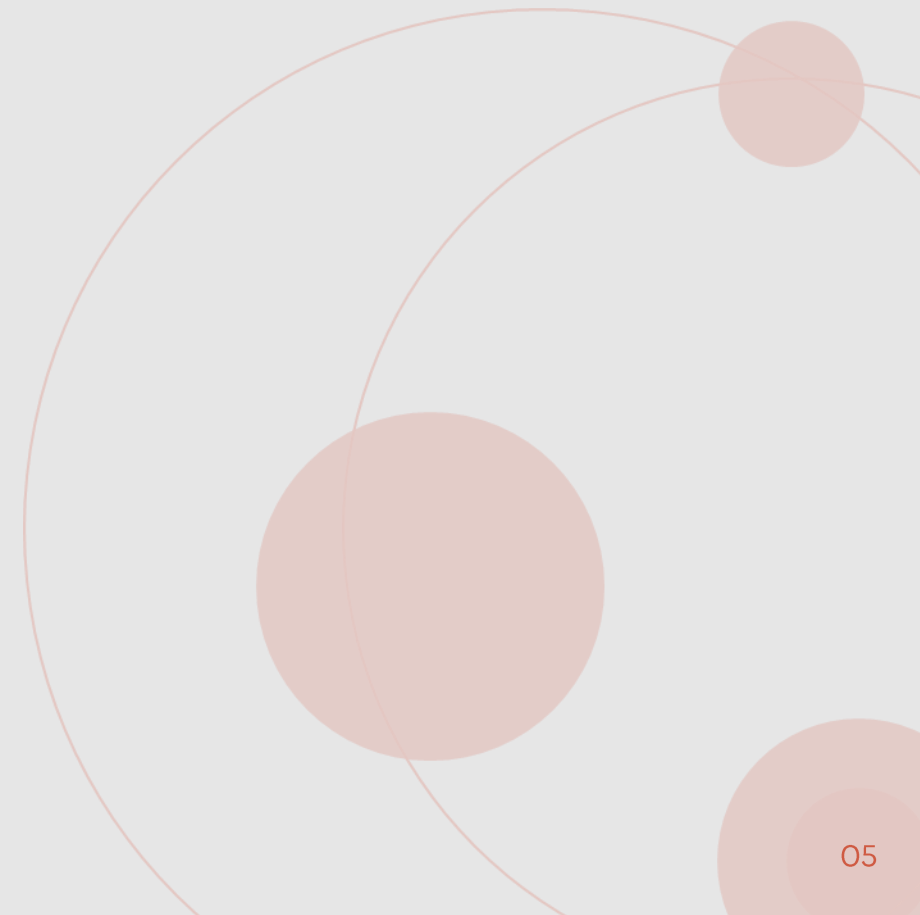


ADD YOUR COMPANY INFORMATION

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## Krakow IT Market Map

# Market snapshot

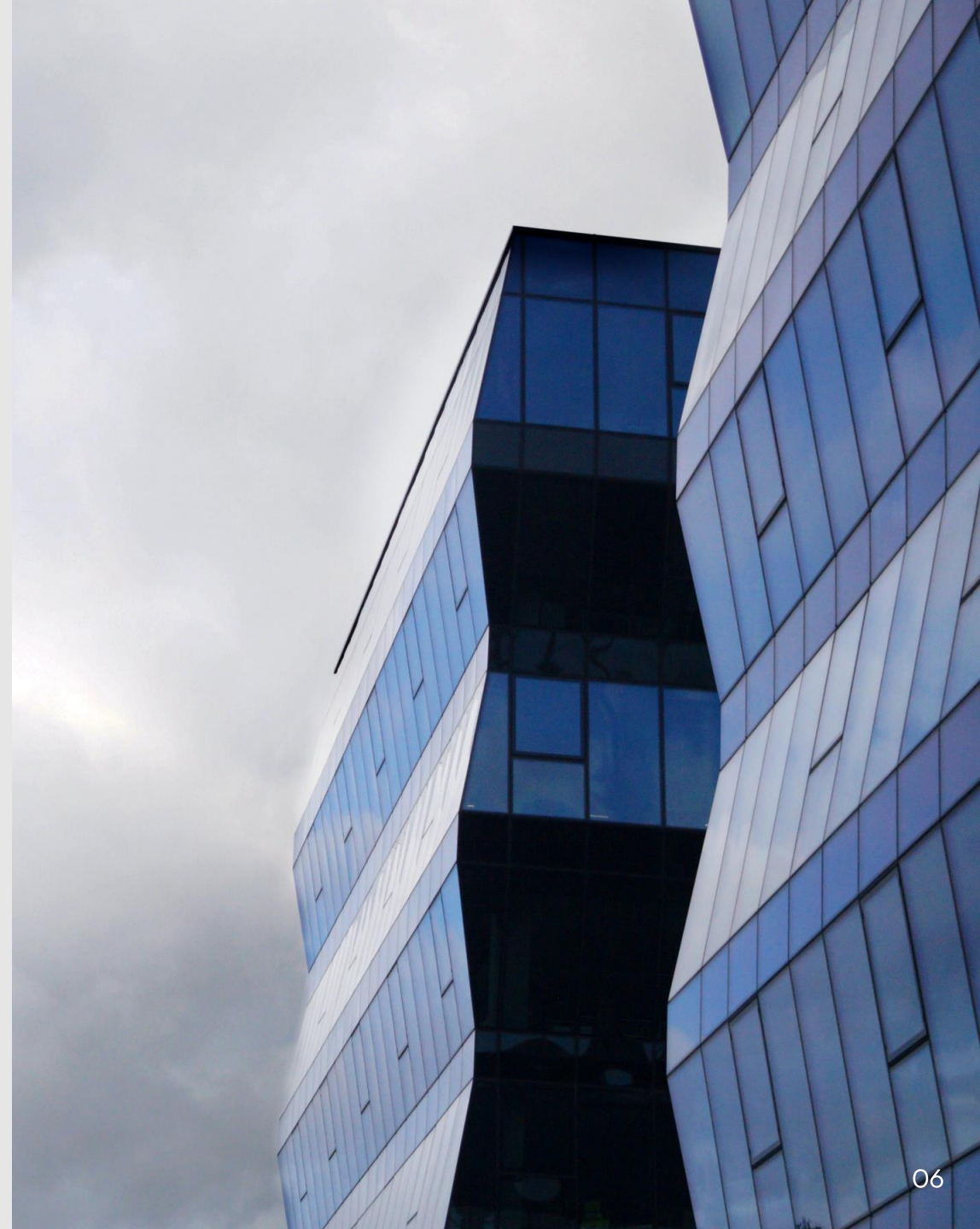


# Market snapshot

Over the last decade, Krakow has become a leading tech hub in Europe and a top choice for new investments. The city's growth is driven by two main factors that go hand in hand: talent and companies. The Krakow IT market is home to approximately 55 000 IT specialists and 500+ IT companies, with the market expanding by an estimated 10% annually. The next pages will present the characteristics of these companies and the qualified IT specialists working for them.

## Key findings

- Our dataset shows that only 17% of IT specialists in Krakow work for Polish companies, while 38% are employed by American firms.
- More than half of the IT companies in Krakow are organizations with 11-100 IT FTE.
- The IT Consulting & Services industry employs 27% of Krakow's IT talent pool, followed by the Finance (16%) and Software (15%) industries.
- In the past five years (2018-2022), Krakow has welcomed 63 new companies with at least 10 IT FTE.



Market snapshot

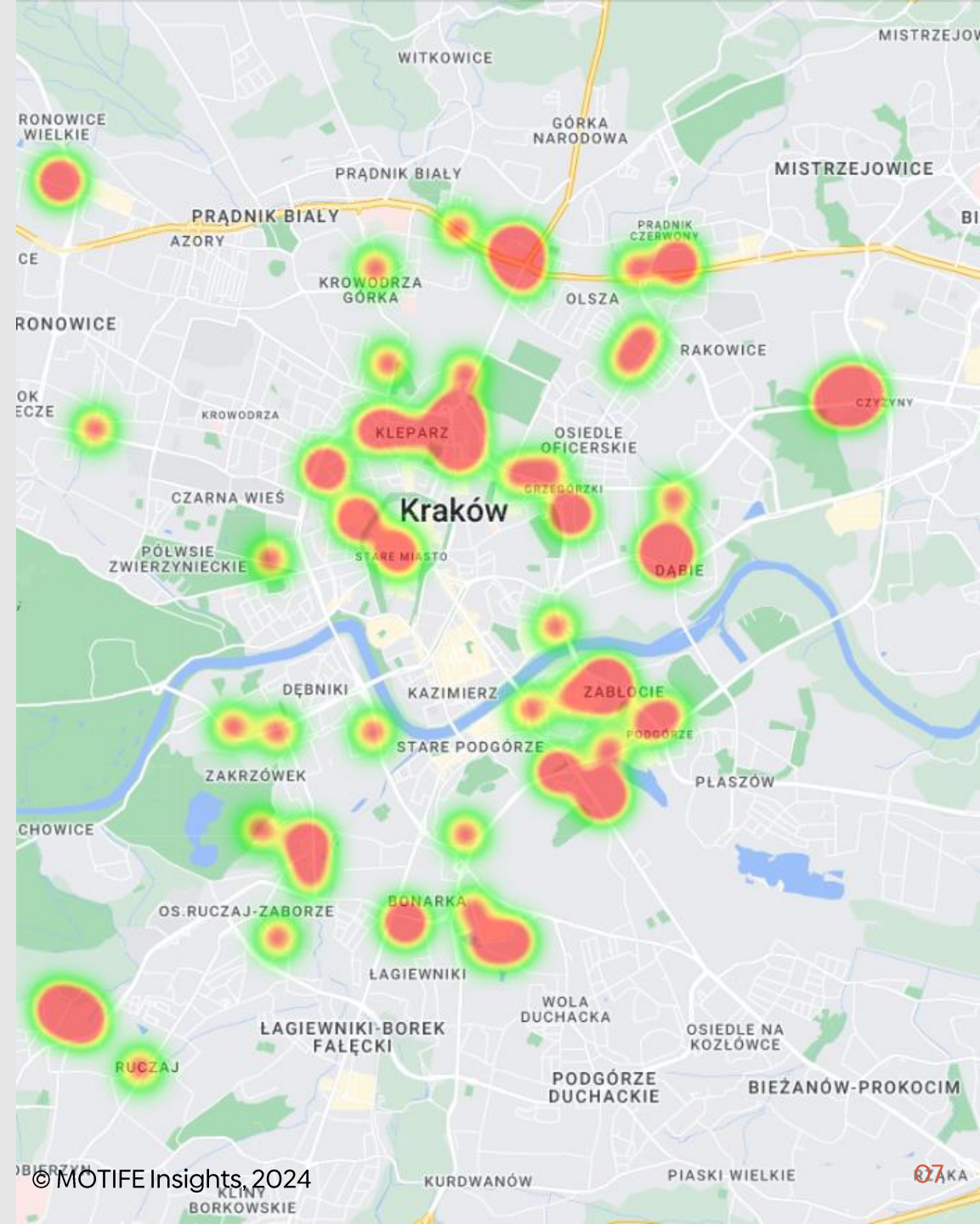
# Office locations

## Heatmap of Krakow's 100 largest IT employers

This map illustrates the office locations of over 37 200 IT specialists employed by the 100 largest IT employers in Krakow. The IT headcount at these companies ranges from 70 to 2 500 IT specialists. The density is represented by the heatmap colors.

A distinctive feature of Krakow's office market is the geographic dispersion of complexes across the city, rather than a single, large business district. A large popular central area is clearly visible from Old Town, through Main Train Station area to Fabryczna complex.

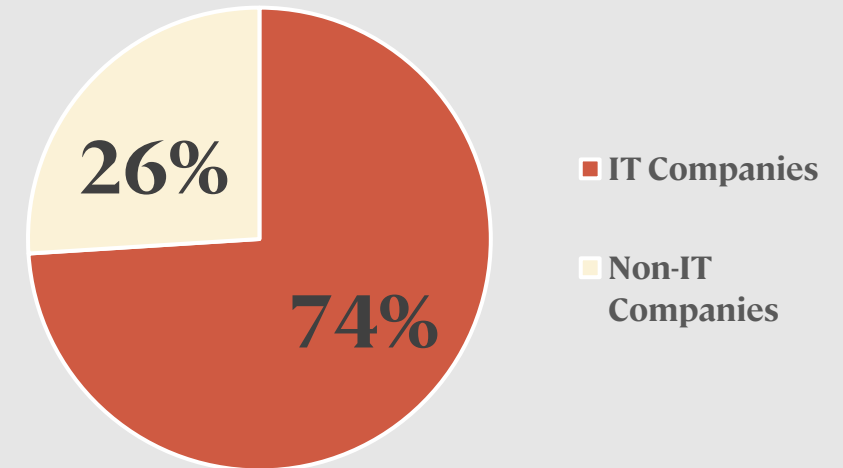
Some of the dense points represent the new office complexes built in past five years, which correspond to ca. 600 000 m<sup>2</sup> surface added during this period. Their central locations and modern amenities have enticed companies to move from older buildings, leading to increased vacancy rates in some of the more remote locations, such as the former Krakow Business Park (now Exiumius Park) in Zabierzów.



# Our dataset: IT talent by company size

Company size (IT FTE)	Count of companies	% of total companies	Share of IT talent pool	Leading industry
1-10	66	21%	1%	Software
11-100	179	56%	16%	Software
101-200	33	10%	11%	Software
201-500	25	8%	19%	Finance
501-999	8	2%	13%	IT Consulting and Services
1000+	10	3%	40%	IT Consulting and Services

## IT companies vs. Non-IT companies



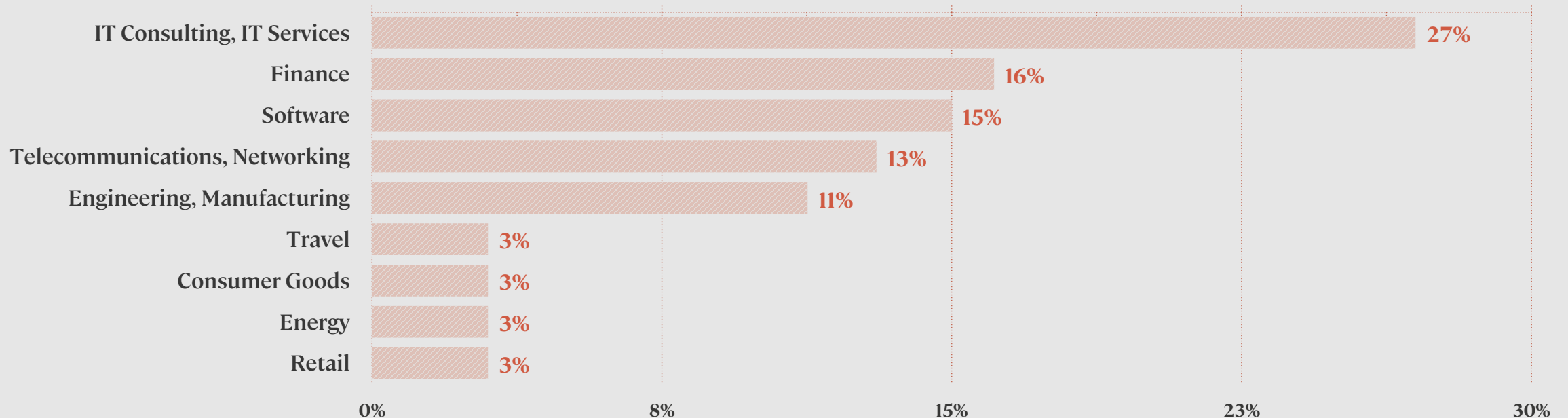
The majority of Krakow's IT talent pool (74%), is employed by technology companies (where IT specialists represent over 50% of company's headcount).. Meanwhile, 26% of IT specialists in Krakow are employed by non-IT companies, most commonly banks and FinTech companies.



# Our dataset: IT talent by industry

**The IT Consulting and Services industry employs the largest share (27%) of IT specialists in Krakow.**

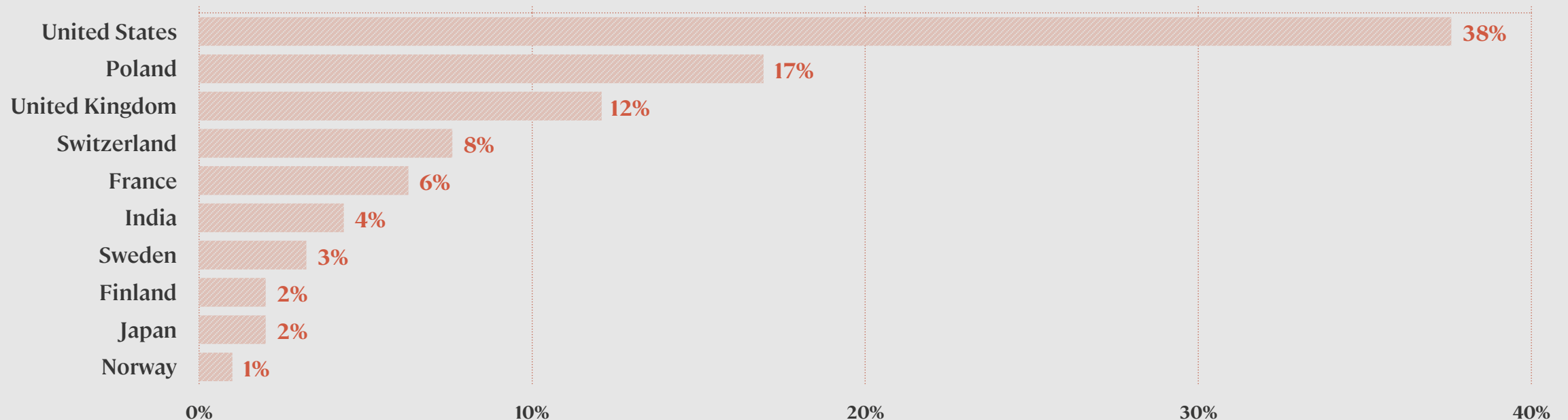
The Finance industry comes in second place (16%), fueled by large institutions like HSBC, UBS and Alior, as well as the arrival of new FinTech players. It is followed closely by Software (15%), Telecommunications (13%) and Engineering & Manufacturing (11%).



# Our dataset: IT talent by company's origin

**American companies employ by far the largest share of Krakow's IT talent pool, at 38%.**

Surprisingly, the share of IT talent employed by EU companies (excluding Poland) is relatively small, at 11%, and it reaches 28% when including Polish companies. In comparison, non-EU companies account for 72% of IT employment. Notably, German companies have a minimal IT employment presence in Krakow.



Market snapshot

# Our dataset: Polish companies

**Focus – Polish companies employing IT specialists in Krakow**

**17%**

**Share of IT talent pool that works in Polish companies**

**150+**

**Start-ups in Krakow**

**40%+**

**Share of IT talent working in Polish IT Consulting & Services companies**

Source: Dataset by MOTIFE Insights, November 2023, N = 321

Among Krakow's IT specialists working for Polish firms, over 40% are employed in the IT Consulting and Services industry, a figure that is higher than the average for all companies regardless of origin, which stands at 27%. Recognized Polish companies in this industry include j-labs, Software Mind, Avenga, along with a multitude of smaller companies that employ between 10 to 100 IT FTEs.



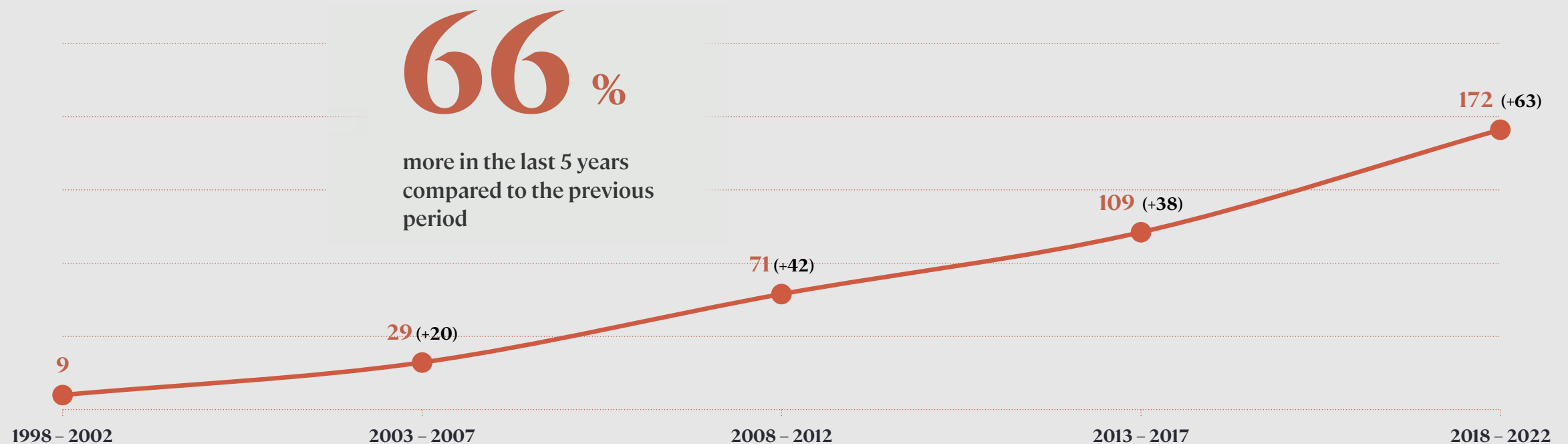
# New IT players in Krakow with over 10 IT FTE

**The number of companies employing IT specialists in Krakow, both Polish and foreign, has consistently increased over time.**

With 63 new entrants with at least 10 IT FTE in the last 5 years, the growth of international players reached an all-time high. Worth noting, some large, well established non-IT companies in Krakow are now expanding the scope to build IT teams in their existing centers. Both trends are fueling the annual growth of the Krakow IT market.

**66%**

more in the last 5 years  
compared to the previous  
period



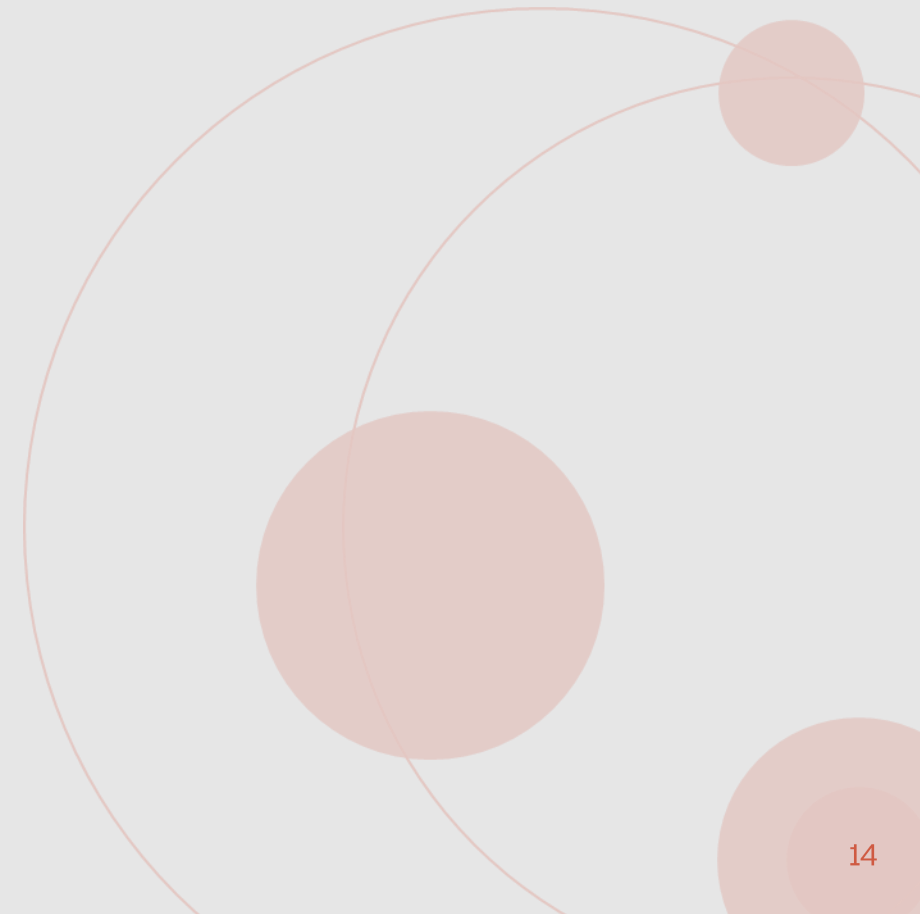
# New IT players in Krakow

**Timeline of new foreign IT players in Krakow (2012-2022), with over 10 IT FTE**



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**Krakow IT Market Map**

# Largest IT employers



# Largest IT employers

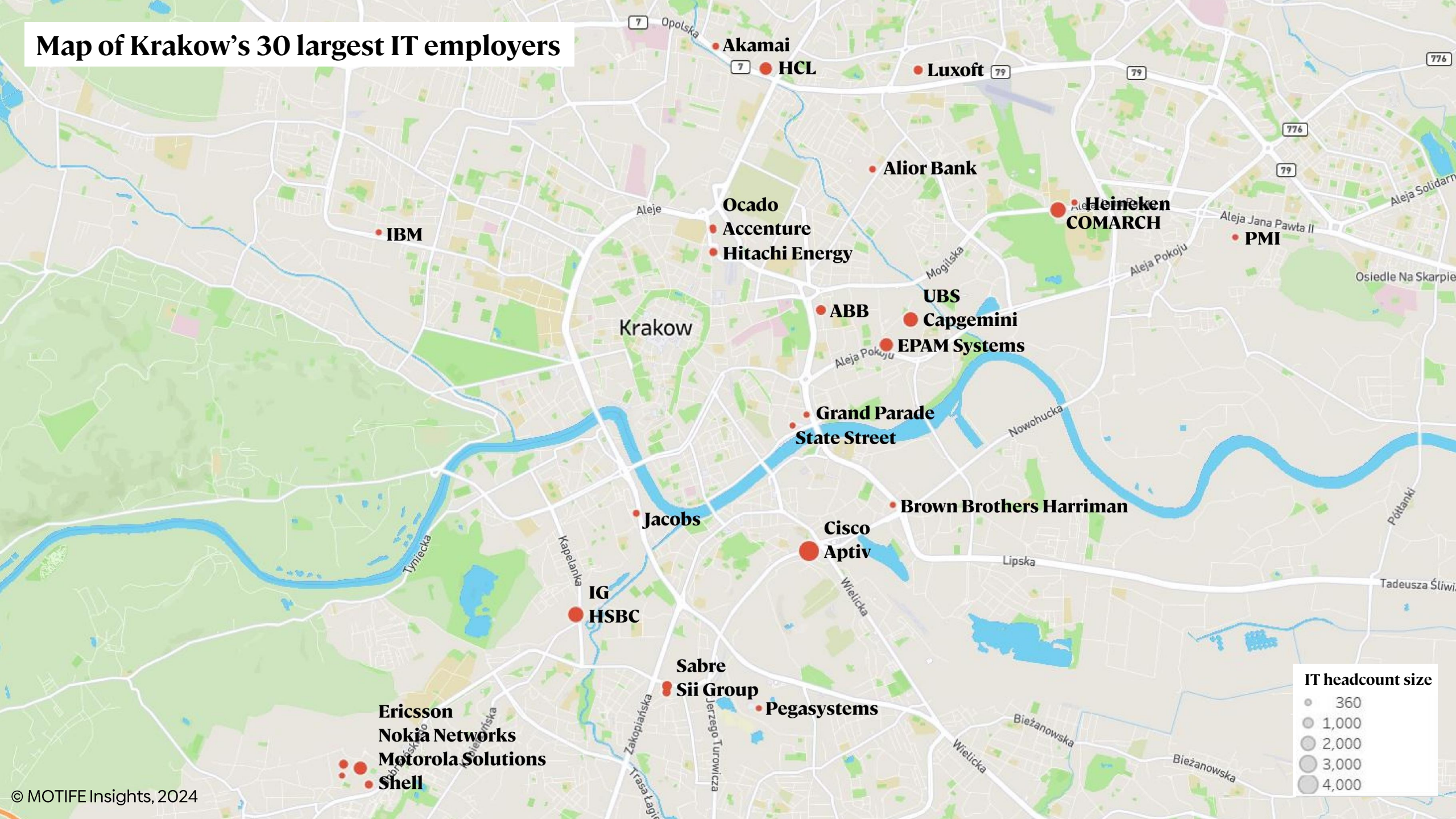
Krakow has become Central Europe's key hub for the world's corporations Business Services and Technology functions, significantly shaping the job market in our city. These companies have been pivotal in developing the IT job market in Krakow since the early 2000s, when only a few large companies like Comarch and some international firms were present. Now, 30 of these large companies employ half of the IT specialists in the city.

## Key findings

- HSBC remains the largest IT employer in Krakow, with 2 500 IT specialists, followed closely by Comarch and Aptiv.
- The top 30 largest IT employers altogether employ 28 100 IT specialists, representing half of Krakow's IT talent pool.
- The three leading industries among top 30 companies are IT Consulting & Services (24%), Telecommunications & Networking (20%), and Finance (18%).
- The top three countries where top 30 companies originate are the United States (40%), the United Kingdom (14%), and Switzerland (11%).







# Map of Krakow's 30 largest IT employers





## Largest IT employers

# Largest IT employers in Krakow (#1-10)

#	Company	Industry	IT headcount ▼	Total headcount	Country of origin
1	 HSBC	Finance	2 500	6 500	United Kingdom
2	COMARCH	Software	2 400	3 300	Poland
3	• APTIV •	Engineering	2 200	3 800	United States
4	<epam>	IT Consulting	1 800	2 000	United States
5	 CISCO	Telecom	1 800	2 500	United States
6	 MOTOROLA SOLUTIONS	Telecom.	1 700	2 500	United States
7	HCL	IT Consulting	1 600	1 900	India
8	Capgemini 	IT Consulting	1 300	5 000	France
9	Sabre	Travel	1 041	1 206	United States
10	ABB	Engineering	1 000	2 200	Switzerland

17k

IT specialists employed  
by 10 largest companies

2








Of these top 10 are non-IT  
companies

5

Of these top 10  
companies have their  
headquarters in the USA











## Largest IT employers

# Largest IT employers in Krakow (#11-20)

#	Company	Industry	IT headcount ▼	Total headcount	Country of origin
11	 Luxoft	IT Consulting	850	1100	Switzerland
12	 ERICSSON	Telecom.	850	1100	Sweden
13	 UBS	Finance	850	4 900	Switzerland
14		IT Consulting	790	8 45	France
15	Nokia Networks	Telecom.	700	900	Finland
16	 Hitachi Energy	Energy	690	1300	Japan
17	 Akamai	Telecom.	550	850	United States
18	<b>Jacobs</b>	Engineering	533	1710	United States
19	<b>accenture</b>	IT Consulting	500	1300	Ireland
20	 ALIOR BANK	Finance	500	1700	Alior

## Largest IT employers

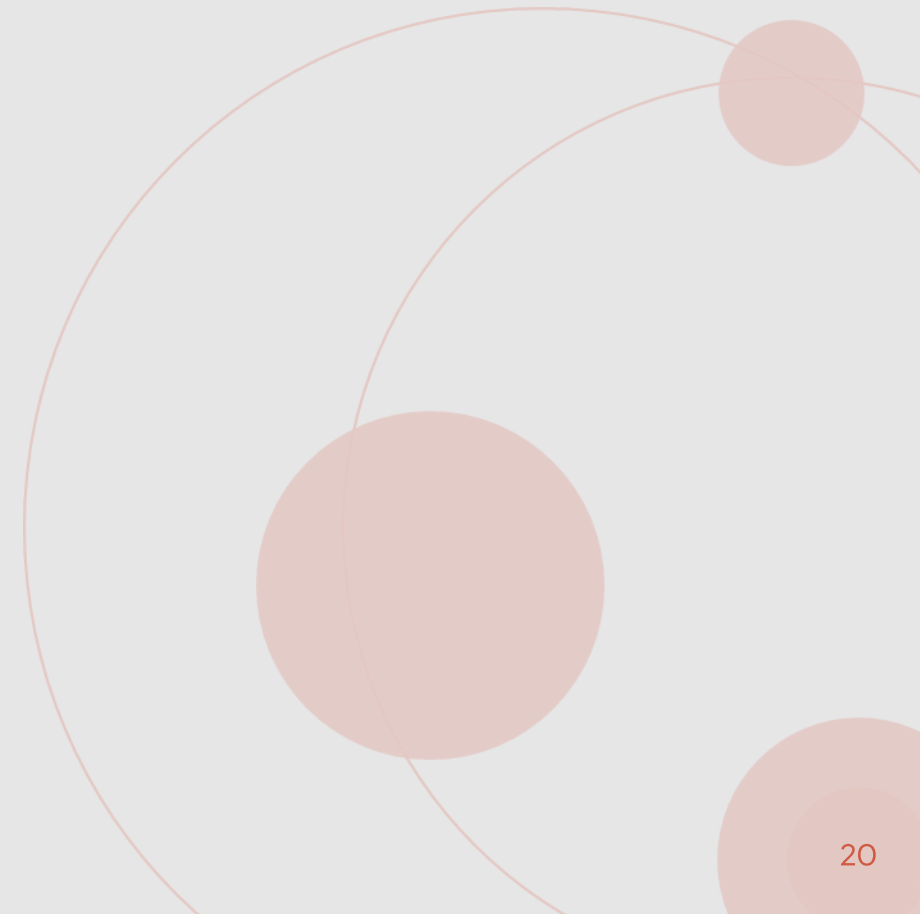
# Largest IT employers in Krakow (#21-30)

#	Company	Industry	IT headcount ▼	Total headcount	Country of origin
21	 STATE STREET	Finance	450	3 400	United States
22		Software	450	2 500	United States
23	 PEGA	Software	410	480	United States
24	 PHILIP MORRIS INTERNATIONAL	Consumer Goods	400	2 200	Switzerland
25		Energy	400	5 000	United Kingdom
26		Finance	380	700	United Kingdom
27	 BROWN BROTHERS HARRIMAN	Finance	370	1 600	United States
28	 ★ Heineken®	Consumer Goods	366	843	The Netherlands
29	 ocado	Retail	360	420	United Kingdom
30	 GRAND PARADE	Entertainment	360	370	United Kingdom

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**Krakow IT Market Map**

# Survey about women in IT



# Survey about women in IT

## Key findings

- 84 companies shared their data about women in IT, out of 115 survey respondents,
- These 84 companies, which employ a third of Krakow's total IT talent pool, report that women represent an average of 26% of their IT headcount in Krakow, totaling 4 735 female IT specialists.
- The average share of women in IT headcount is noticeably higher in the Finance industry than in traditionally IT-focused industries such as Software and IT Consulting & Services.

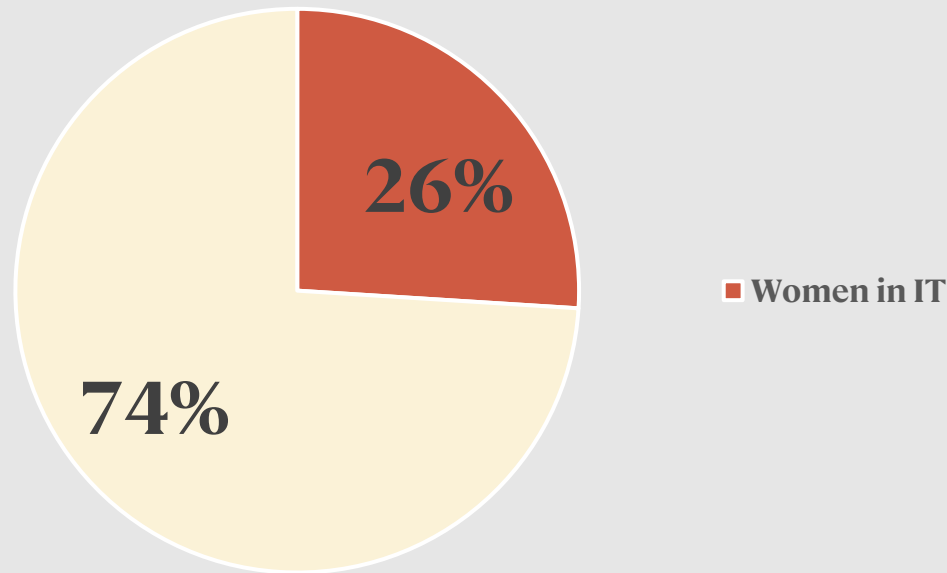
**Commentary:** The data represent only a fraction of the market for the companies that were willing to share their data. Therefore, the results offer an optimistic perspective and highlight the best-in-class companies, rather than presenting a realistic picture.

As mentioned in our 2023 Krakow IT Market Report, the average share of women in IT across Poland is estimated at 15.5%. Noticeably, the share of women is increasing and our estimation of the overall share of women in IT in Krakow is about 19%, which is also clearly visible in the amount of female ICT students in Krakow. We are also observing a growing number of women holding leadership roles in IT organizations in Krakow, such as Google, Hitachi Energy or Akamai.



# Survey: Share of women in IT

**Share of women in IT headcount for Krakow companies that voluntarily shared the data (84 respondents out of 115 companies surveyed)**



**Share of women in IT headcount in Krakow per industry**

**30%**

Finance

**26%**

Telecommunications,  
Networking

**21%**











IT Consulting, IT  
Services

**19%**

Software

In Krakow, women in IT are more prevalent in non-core IT industries, holding 30% in Finance and 26% in Telecom, versus 21% in IT Consulting and 19% in Software, indicating potentially a sector-specific cultural or hiring practice differences.

## Survey: Largest employers of women in IT in Krakow (#1-10)

#	Company	Industry	Female IT headcount ▼	Share of IT headcount
1	 HSBC	Finance	820	32%
2	 <epam>	IT Consulting	702	39%
3	 CISCO	Telecom	630	35%
4	 MOTOROLA SOLUTIONS	Telecom	289	17%
5	 UBS	Finance	281	33%
6	 Sabre	Travel	202	19%
7	 Hitachi Energy	Energy	179	26%
8	 PHILIP MORRIS INTERNATIONAL	Consumer goods	172	43%
9	 SII	IT consulting	164	21%
10	 BROWN BROTHERS HARRIMAN	Finance	122	33%

**3.6K**

Female IT specialists employed by these 10 companies

**30%**






Average share of women in IT headcount in these 10 companies

**820**

Largest female IT headcount in Krakow in a single company (HSBC)

## Survey about women in IT



# Survey: companies with the largest share of women in IT in Krakow (500+ IT FTEs)

#	Company	Industry	Share of IT headcount ▼	Female IT headcount
1	 <epam>	IT Consulting	39%	702
2	 CISCO	Telecom	35%	630
3	 UBS	Finance	33%	281
4	 HSBC	Finance	32%	820
5	 Hitachi Energy	Energy	26%	179





## Survey about women in IT

# Survey: companies with the largest share of women in IT in Krakow (100 – 500 IT FTEs)

#	Company	Industry	Share of IT headcount ▼	Female IT headcount
1	 Lufthansa	Travel	50%	60
2	PHILIP MORRIS INTERNATIONAL	Consumer Goods	43%	172
3	INTERNATIONAL  PAPER	Engineering	35%	56
4	BROWN BROTHERS HARRIMAN	Finance	33%	122
5	softserve	IT Consulting	31%	53

## Survey about women in IT

# Survey: companies with the largest share of women in IT in Krakow (30 – 100 IT FTEs)

#	Company	Industry	Share of IT headcount ▼	Female IT headcount
1	 Electrolux	Consumer Goods	41%	28
2	<b>dyson</b>	Consumer Goods	40%	32
3	 <b>APPTIO</b> <small>an IBM Company</small>	Software	35%	32
4	UNTITLED.KINGD	IT Consulting	35%	18
5	<b>creativestyle</b>	IT Consulting	34%	15

Survey about women in IT

# Thank you!

## Companies that voluntarily shared their data about women in IT

Accens, Alior, Applandeo, Apptio, an IBM Company, Architech Poland, Backbase Poland, Baseline, Basler, Beekeeper Poland, Black Label, Brainly, Brown Brothers Harriman, Busy Rebel, Cisco Systems Poland, CleanWhale, Codete Global, Collabera Digital Poland, CosmicWeb, creativestyle, Dyson, EPAM Systems, EUROCLEAR SA/NV, Electrolux Group, Esatto Poland, FDM Group, Fingoweb, Forte Digital, Futurehome, Grape Up, Gravity 9 Poland, HSBC, Hatimeria, Hitachi Energy, IBM, INNERGO Systems, Infogain Technologies, Infolet, Intellias Poland, International Paper, Inuits, KION Business Services Polska, Kingfisher, Kitopi, Lime Technologies, Lufthansa Global Business Services, Master Key, MindMics Polska, Miquido, mpeople, Motorola Solutions, N-iX, Office Samurai, Omni Calculator, Open GI, Opsenio, PMI Service Center Europe, Peak11, Persistent Systems, Primetals Technologies Poland, PushPushGo, PXP Shape, Real Time Poland, ReliaSol, SMART.BIZ, Sabre Polska, Schibsted Tech Polska, Sii, SoEasyIT, SoftServe, Software Mind, Solvbot, SpotOn Transact, Stellantis, Stonly, Tagvenue Inc., Talent Alpha, Telenor Linx Polska, Tronel, UBS, Unit8, Untitled Kingdom, Volvo Tech Hub, WP Engine Poland, Zilch Poland.

ADD OR UPDATE YOUR COMPANY INFORMATION

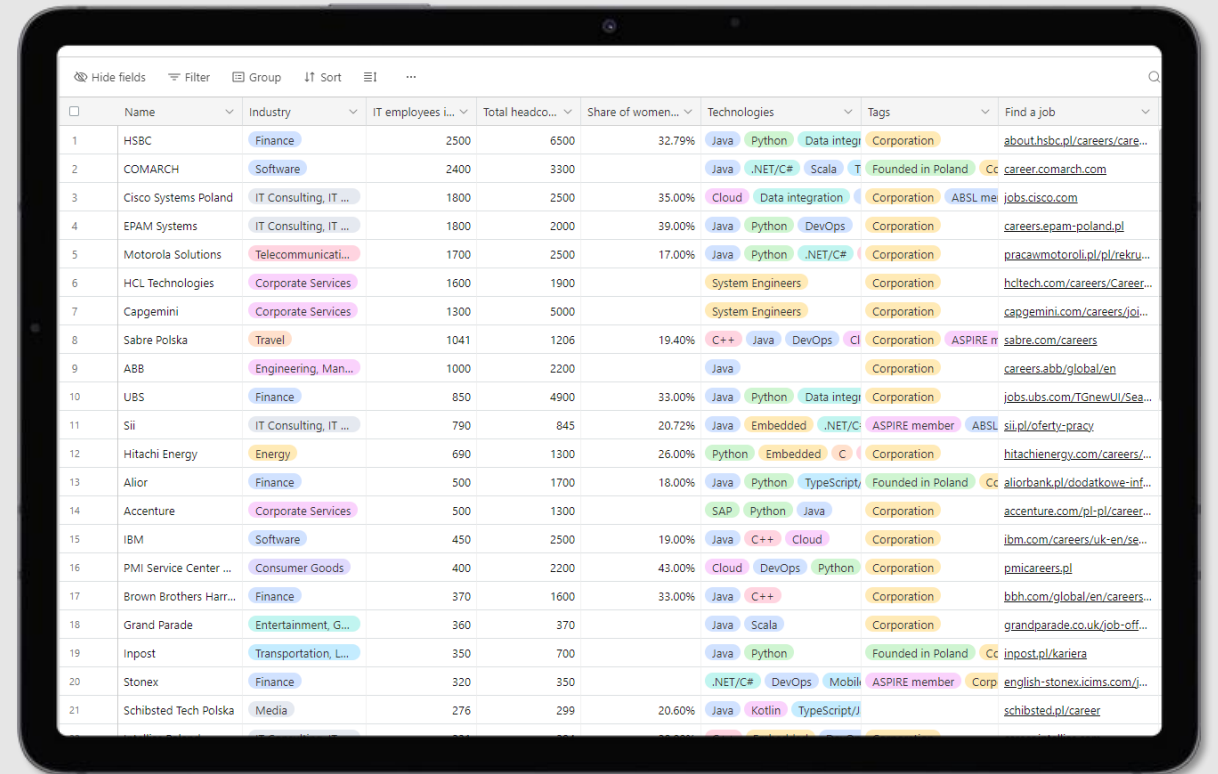
# Open dataset

This survey continues to be open to submit and browse the dataset.

On the Krakow IT Market Map webpage, you can:

1. Update your organization's information at any time
2. Add your organization's information if it has not been submitted yet
3. Access the raw data submitted by survey participants

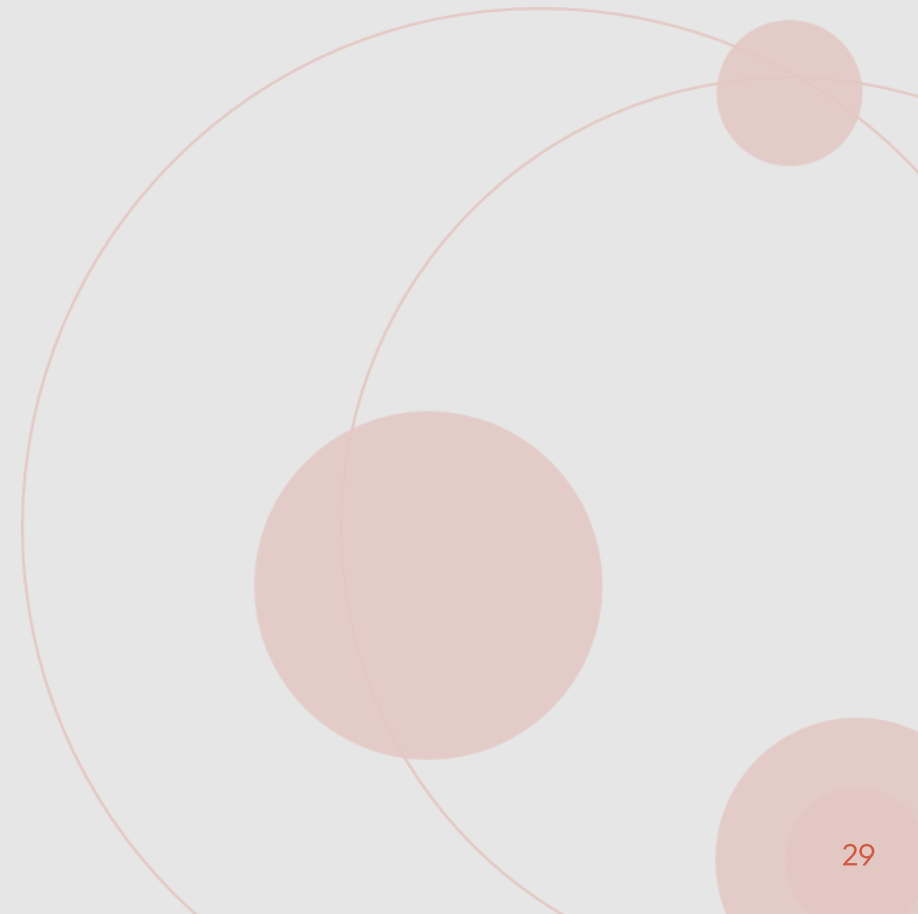
BROWSE THE DATASET



	Name	Industry	IT employees i...	Total headco...	Share of women...	Technologies	Tags	Find a job
1	HSBC	Finance	2500	6500	32.79%	Java Python Data integri	Corporation	about.hsbc.pl/careers/care...
2	COMARCH	Software	2400	3300		Java .NET/C# Scala T	Founded in Poland Cc	career.comarch.com
3	Cisco Systems Poland	IT Consulting, IT ...	1800	2500	35.00%	Cloud Data integration	Corporation ABSL me	jobs.cisco.com
4	EPAM Systems	IT Consulting, IT ...	1800	2000	39.00%	Java Python DevOps	Corporation	careers.epam-poland.pl
5	Motorola Solutions	Telecommunicati...	1700	2500	17.00%	Java Python .NET/C#	Corporation	pracawmotoroli.pl/rekru...
6	HCL Technologies	Corporate Services	1600	1900		System Engineers	Corporation	hcltech.com/careers/Career...
7	Cappemini	Corporate Services	1300	5000		System Engineers	Corporation	cappemini.com/careers/oi...
8	Sabre Polska	Travel	1041	1206	19.40%	C++ Java DevOps CI	Corporation ASPIRE m	sabre.com/careers
9	ABB	Engineering, Man...	1000	2200		Java	Corporation	careers.abb/global/en
10	UBS	Finance	850	4900	33.00%	Java Python Data integri	Corporation	jobs.ubs.com/TGnewUI/Sea...
11	Sii	IT Consulting, IT ...	790	845	20.72%	Java Embedded .NET/C	ASPIRE member ABSL	sii.pl/oferty-pracy
12	Hitachi Energy	Energy	690	1300	26.00%	Python Embedded C	Corporation	hitachienergy.com/careers/...
13	Alior	Finance	500	1700	18.00%	Java Python TypeScript	Founded in Poland Cc	aliorbank.pl/dodatkowe-inf...
14	Accenture	Corporate Services	500	1300		SAP Python Java	Corporation	accenture.com/pl-pl/career...
15	IBM	Software	450	2500	19.00%	Java C++ Cloud	Corporation	ibm.com/careers/uk-en/se...
16	PMI Service Center ...	Consumer Goods	400	2200	43.00%	Cloud DevOps Python	Corporation	pmicareers.pl
17	Brown Brothers Harr...	Finance	370	1600	33.00%	Java C++	Corporation	bbh.com/global/en/careers...
18	Grand Parade	Entertainment, G...	360	370		Java Scala	Corporation	grandparade.co.uk/job-off...
19	Inpost	Transportation, L...	350	700		Java Python	Founded in Poland Cc	inpost.pl/kariera
20	Stonex	Finance	320	350		.NET/C# DevOps Mobili	ASPIRE member Corp	english-stonex.icims.com/j...
21	Schibsted Tech Polska	Media	276	299	20.60%	Java Kotlin TypeScript/J		schibsted.pl/career

**Report authors**

# About MOTIFE



# Our services

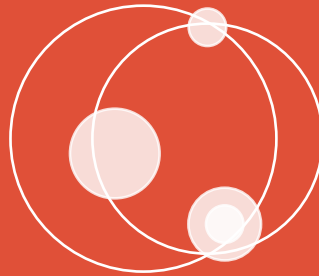


## Recruitment & RPO

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- Contingency/success-fee recruitment
- Executive search
- Recruitment Process Outsourcing (RPO)

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## Staff Augmentation & EOR

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- IT Staff Augmentation
- Employer of Record (EOR)
- B2B Contractor Hiring

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## Setup & Operations Management

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- Nearshoring advisory
- Entity and operations setup
- Office setup
- Operations management

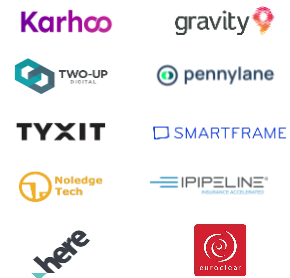
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# Our clients

## North America



## Western Europe



## Scandinavia



## Asia, Middle East



About MOTIFE

# Krakow IT Market Report 2023

This 144-page report is written for the benefit of new and existing tech players, multinational corporations and start-ups, IT professionals, HR and Recruitment teams, investors, educational institutions, and local authorities.

Gain insights into the factors driving its rapid growth, including the talent pool, key companies, education, cost of doing business, compensation packages, and the local ecosystem.

**55k**

Engineers and IT professionals in Krakow

**2.55k**

Computer Science students graduating yearly in Krakow

**10%**

Estimated annual growth of the IT talent pool

**40**

New IT players in Krakow in the last 12 months

**4.1k EUR**

Median salary for hiring a regular engineer (3-5 years experience) in Poland (gross, monthly)



**The most comprehensive guide  
to the Krakow and Poland  
technology ecosystem**

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## PHOTOS

MOTIFE, Unsplash, Maptive, Tableau

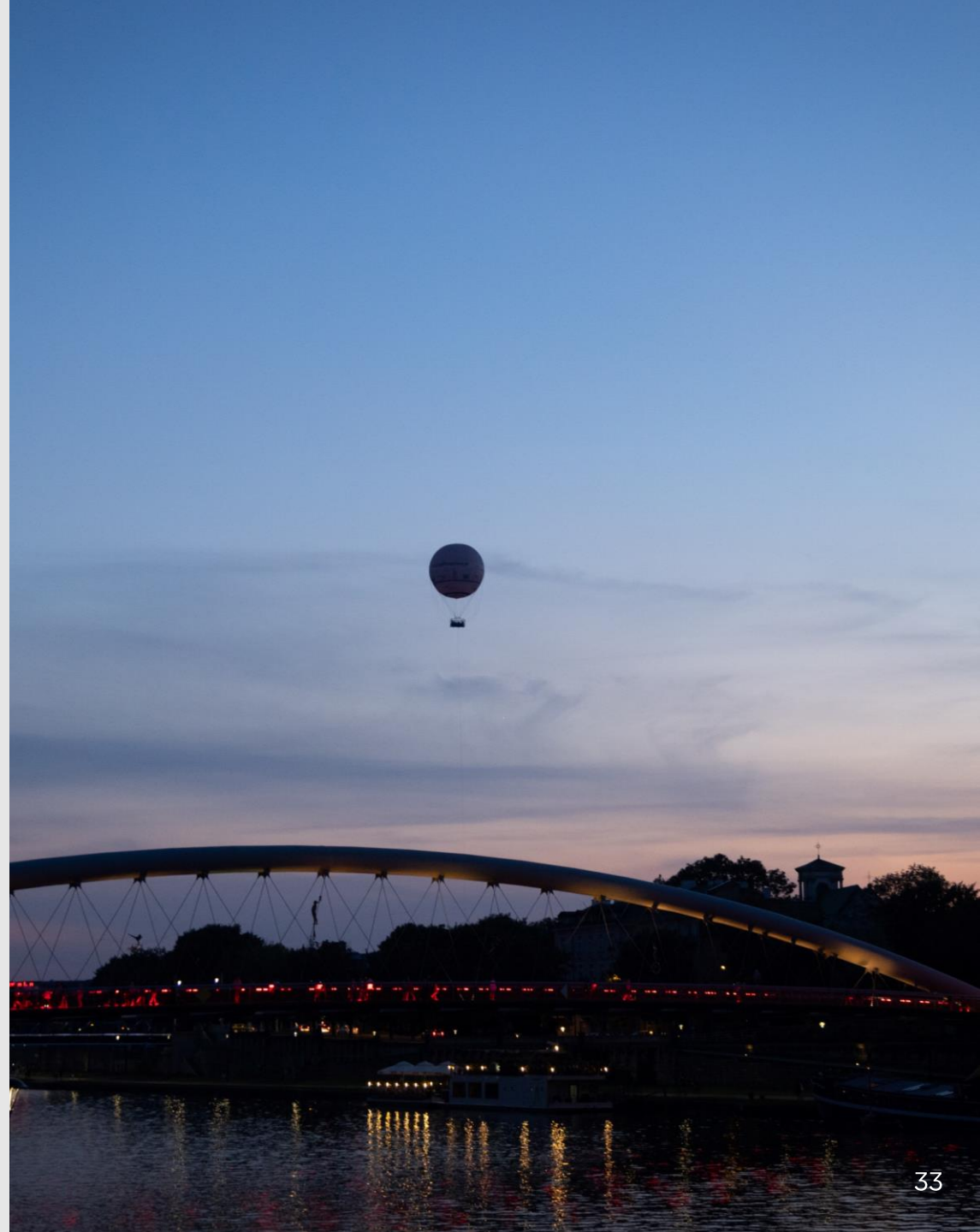
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Share your thoughts, suggestions or questions by writing to [hello@motife.com](mailto:hello@motife.com)

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