

An aerial photograph of Krakow, Poland, featuring the Wawel Castle and the Vistula River. The image is overlaid with a semi-transparent orange map of the city's districts. The background is a warm sunset sky with orange and yellow clouds. The title '2025 Krakow IT Market Map' is centered in large white text.

2025 Krakow IT Market Map

MOTIFE

Community partners:



Krakow IT Market Map

MOTIFE

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Krakow IT Market Map

Introduction

Introduction

The 2025 Krakow IT Market Map offers a comprehensive overview of the city's IT sector. Based on surveys (77 companies) and research (258 firms) via MOTIFE Insights, it details market trends, talent dynamics, and employers.

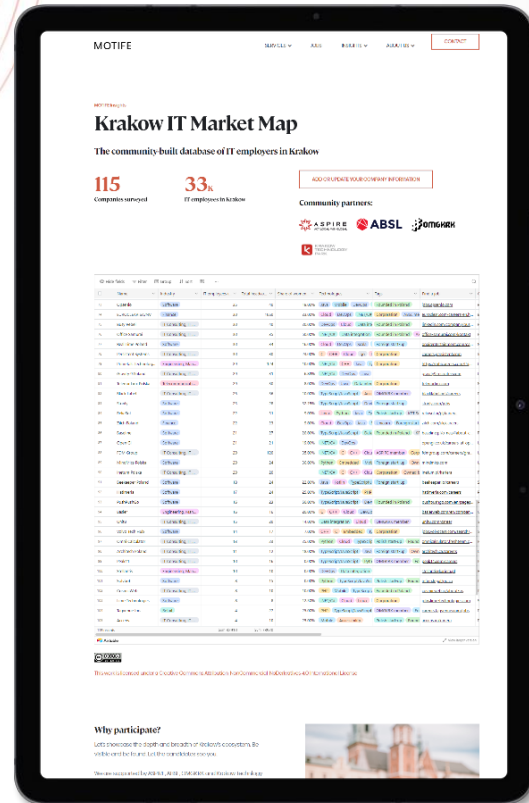
The market continues expanding, attracting international players – now almost 200 total, with 60 added in the last five years. Key findings reveal continued hiring with an estimated 3.5% growth of the IT talent pool in 2024. Krakow's own Comarch ranks as the largest single IT employer.

While the IT sector is growing, its structure is highly concentrated. A small number of large international enterprises employ a disproportionate share of IT professionals. This growth is heavily reliant on American (40% talent share) and Western European investment, showing that the ecosystem is focused on meeting this international demand. Concurrently, a decrease in voluntary employee departures (6% in 2024) could signal worker anxiety about job stability. Also, AI's potential to reshape future skills, graduate hiring, and software engineering as a domain is a factor to watch.

Michał Piątkowski
CEO at MOTIFE



Methodology



ADD YOUR COMPANY INFORMATION

335
Companies researched

43.6к
IT specialists mapped

73%
Share of IT talent pool mapped

Two main data sources:

1) Krakow IT Market Map survey

Conducted in November and December 2024, the Krakow IT Market Map survey collected data on IT functions from 77 participating companies employing IT specialists in Krakow. The MOTIFE Insights Team verified this data before its publication on the project webpage.

Notably, unlike previous editions, this survey explicitly excluded third-party contractors from headcount figures provided by employers, causing visible shifts in the rankings.

2) MOTIFE Insights research

To draw a comprehensive picture of the Krakow IT Market, the MOTIFE Insights Team researched an additional 258 companies employing IT specialists. The team used resources available publicly, such as the national companies register, statistical office, LinkedIn, and career sites, increasing the number of companies in the dataset to 335.

Key findings

Market growth

3.5%

Estimated growth of the Krakow IT Talent pool year-over-year

Talent retention

6%

Average voluntary attrition among the Krakow IT employers in 2024

Layoffs

20%

Of companies conducted non-performance related layoffs

AI adoption

95%

Companies made AI tools available to their engineering teams

Skills

DevOps

Followed by Cloud and Java are the most often seen tech skills in Krakow IT employers

Employers snapshot

Comarch

#1 IT employer in Krakow hiring 2550 IT specialists

US

American companies hire 40% of the Krakow IT talent pool

PL

Polish companies hire 16% of the Krakow IT talent pool

Krakow IT Market Map

Market snapshot

Market snapshot

Krakow labor market

2%

**Unemployment
level**

9%

**Drop in the number
of job offers in labor
office year to year**

11%

**Growth of average
gross monthly salary
in business sector
year to year**

245k

**People employed in
business sector in
Krakow**

21%

**Of them work in ICT
sector***

14.9k

**Average gross
monthly salary
in ICT sector***

*ICT sector – businesses employing 10 or more people with ICT PKD statistical code

Source: Statistical bulletin of the city of Krakow, Q3 2024



Growth

3.5%

Estimated growth of the Krakow IT talent pool year-over-year

IBM

The fastest growing IT employer in 2024, grew by 70% to reach 850

60%

Companies that grew IT teams in 2024

20%+

Companies that grew by more than 10% in 2024

58%

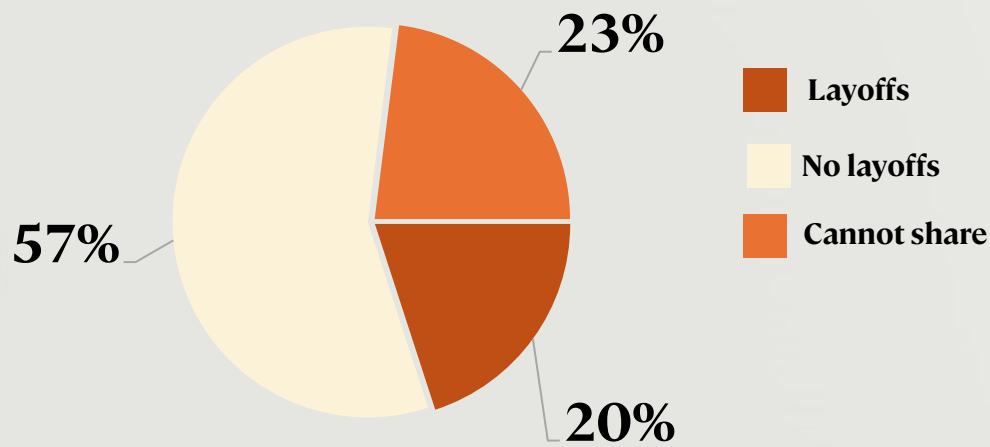
Companies that plan to grow IT teams in 2025

Self-reported data indicate that Krakow's IT sector continues to expand. In 2024, a strong 60% of companies increased their IT teams, with over 20% achieving growth exceeding 10%. Notably, companies such as IBM, Grand Parade, UBS, and StoneX have been among the top employers driving this expansion.

The sector's positive outlook continues into 2025, with 58% of companies planning to grow their IT teams. 29% aim for increases of over 10%. We are yet to see what real numbers are going to look like.

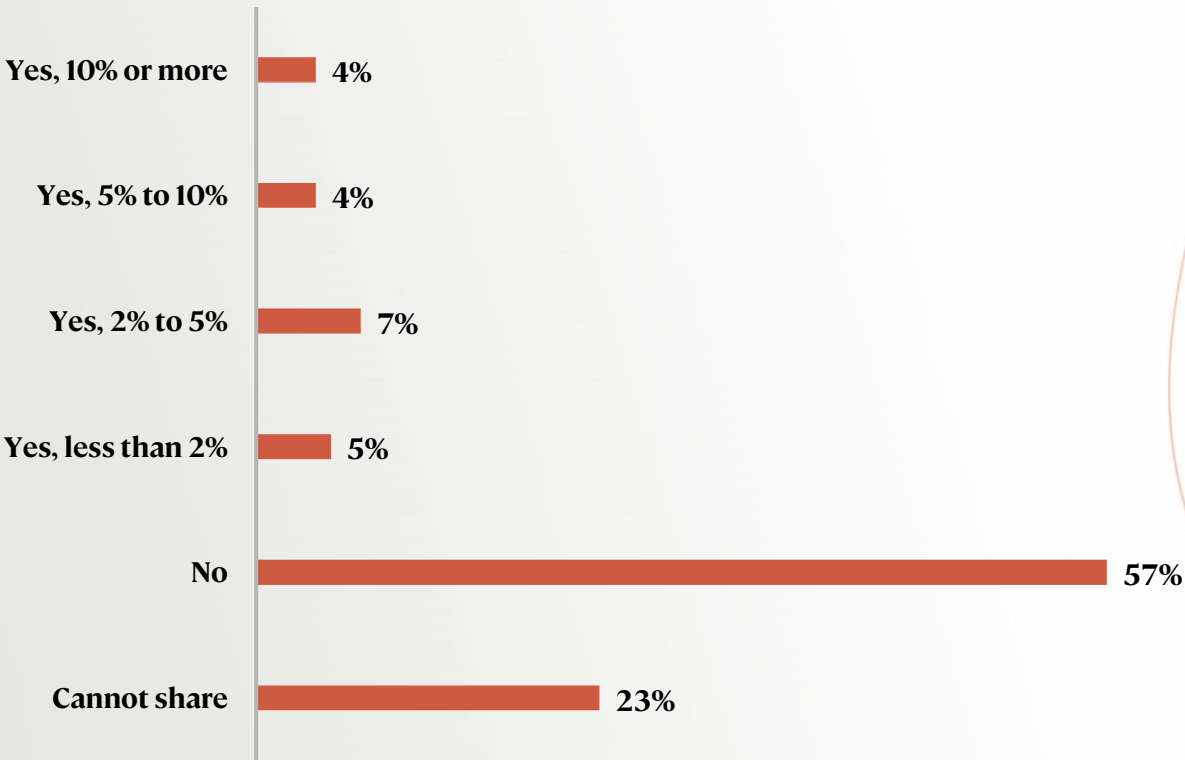
7% declared no growth plans for 2025, compared to 2024 when 23% declared no growth, which may suggest fewer hire freezes and bolder growth plans for the coming year.

Layoffs among Krakow IT employers



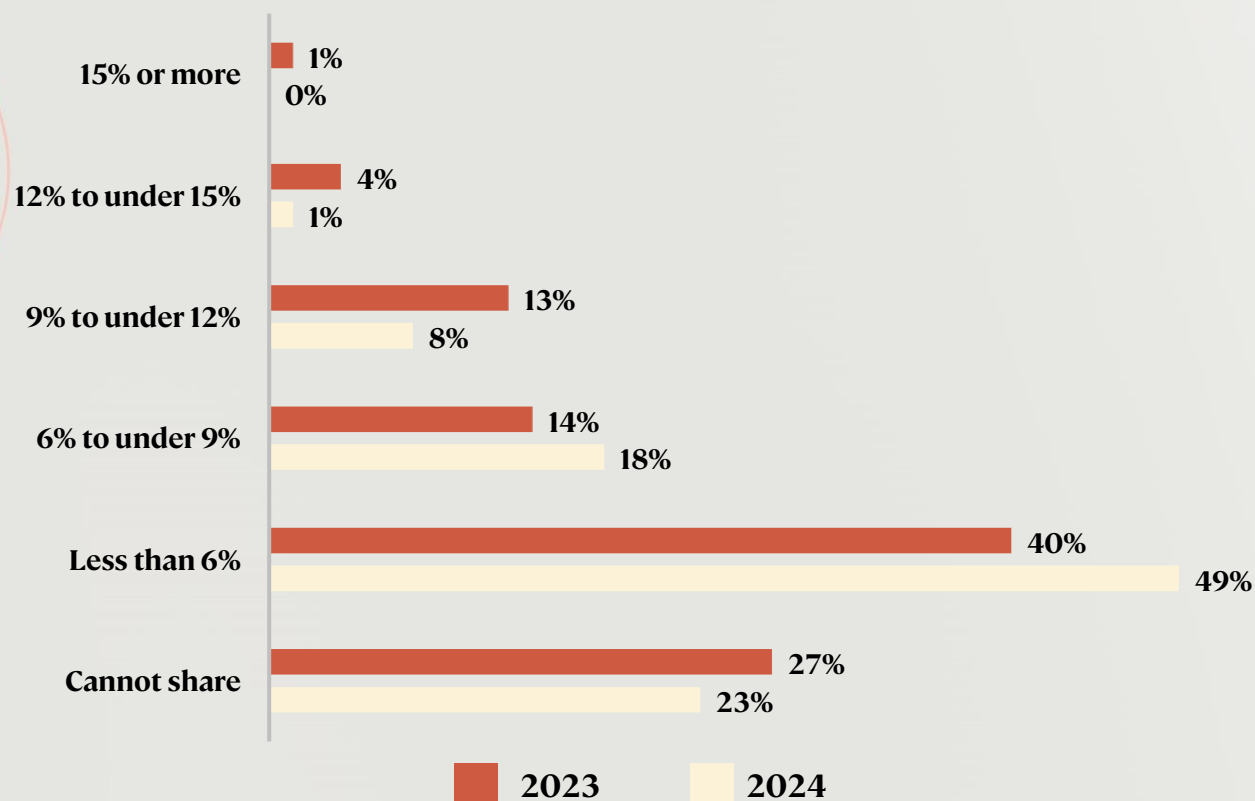
Although 20% of Krakow IT firms experienced non-performance layoffs in 2024, significant downsizing remained infrequent. Indeed, 57% of employers did not implement layoffs. Notably, only a small 4% of responding companies reduced their IT teams by more than 10%, highlighting the limited scale of major workforce cuts.

Level of layoffs performed by Krakow IT employers



Voluntary attrition in the Krakow IT sector

Voluntary attrition levels in IT functions in 2023 vs. 2024 among the Krakow IT employers



6%

Average voluntary attrition among the Krakow IT employers in 2024

8%

Average voluntary attrition among the Krakow IT employers in 2023

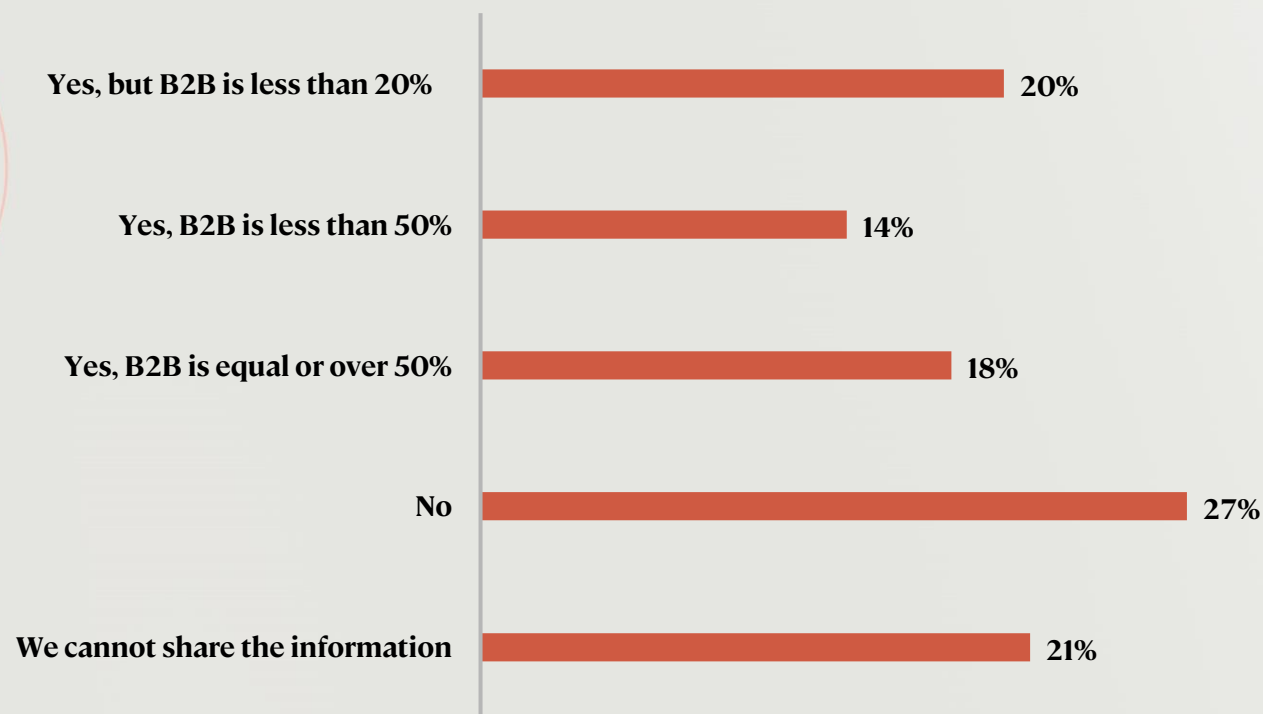
Krakow's IT sector saw a decrease in voluntary attrition, dropping from 8% in 2023 to 6% in 2024.

In 2024, almost half of the companies maintained attrition below 6%, an increase from 40% in 2023.

While seemingly good, extremely low attrition can also be a red flag. It could indicate that the workforce might be too comfortable and resistant to change or indicate a growing fear of job loss.

B2B contracts in Krakow companies

Krakow IT employers by share of team hired on B2B contracts



52%

Companies offer B2B contracts

27%

Companies don't offer B2B contracts at all

65%

Of companies who offer B2B contracts have a preference for perm contracts

Krakow IT companies show varied approaches to B2B contracts. A key finding is that 27% of respondents reported zero B2B contracts for IT hires. Conversely, 18% utilize B2B for 50% or more of their IT workforce. Furthermore, a substantial 34% reported B2B use at below 50% of contracts.

21% of companies didn't provide an answer.

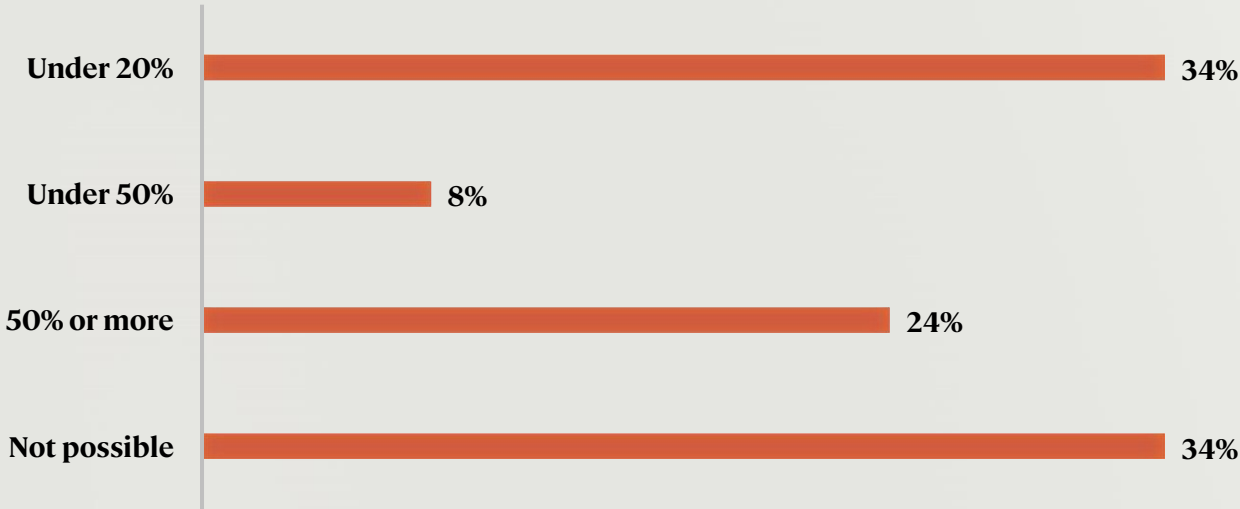
Focus: Fully remote work

34%

Companies offer fully remote work on a case-by-case basis (under 20% of headcount)

34%

Companies don't offer fully remote work



Although 32% of survey respondents offer fully remote work as a standard practice (over 20% of staff), they are mostly smaller organizations. This number drops substantially when we look at the numbers differently:

22%

Companies with over 100 of IT headcount offer fully remote work

7%

Share of companies that offer fully remote work when using company IT headcount as a weight in calculation

Market snapshot

Focus: Adoption of AI tools

Levels of adoption of AI tools among Krakow IT employers

95%

Companies made AI tools available to their engineering teams

33%

Of these companies reported frequent use

15%

Of these companies, reported that use of AI tools is a policy

While 95% of Krakow's IT companies provide access to AI tools, adoption remains uneven. Only half have integrated these technologies into active use or company policy.

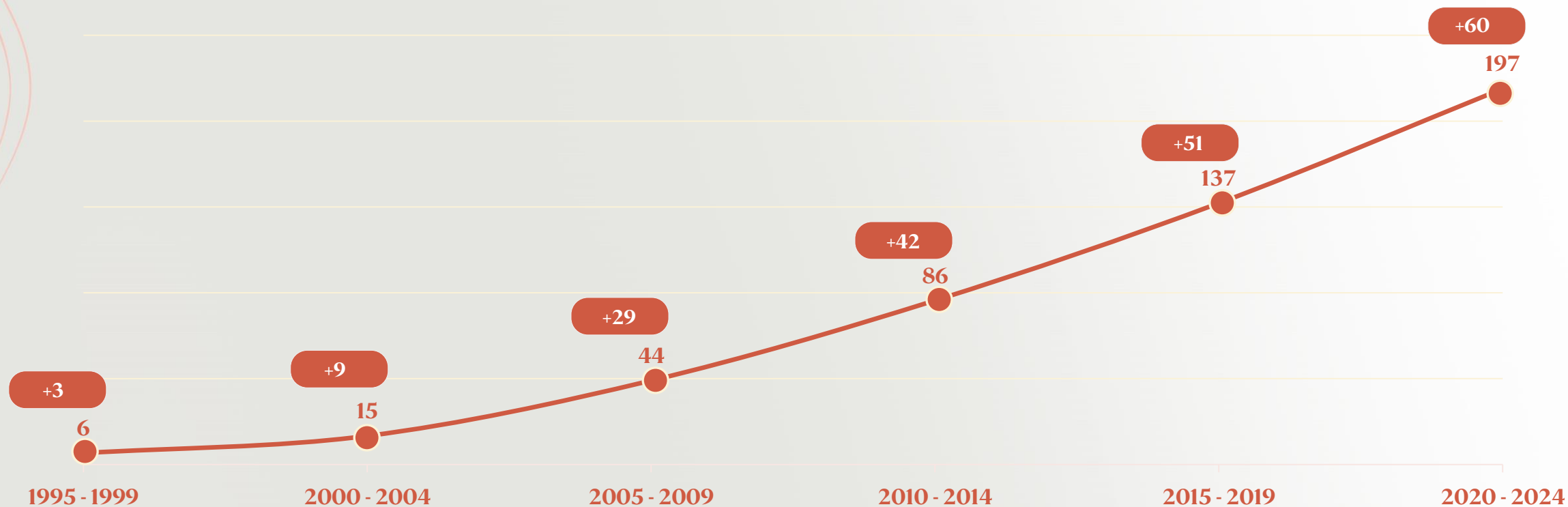
Primarily, AI is employed for code suggestion features, similar to advanced autocomplete.

A small minority, notably IBM, leverage internally developed and trained AI models for software development.



New foreign IT players in Krakow

The number of international companies employing IT specialists in Krakow has consistently increased over time.



New foreign IT players in Krakow

Timeline of new foreign IT players in Krakow (2010-2024), with over 10 IT FTE



Tech skills

40%

Companies hire AI/ML specialists among their IT teams

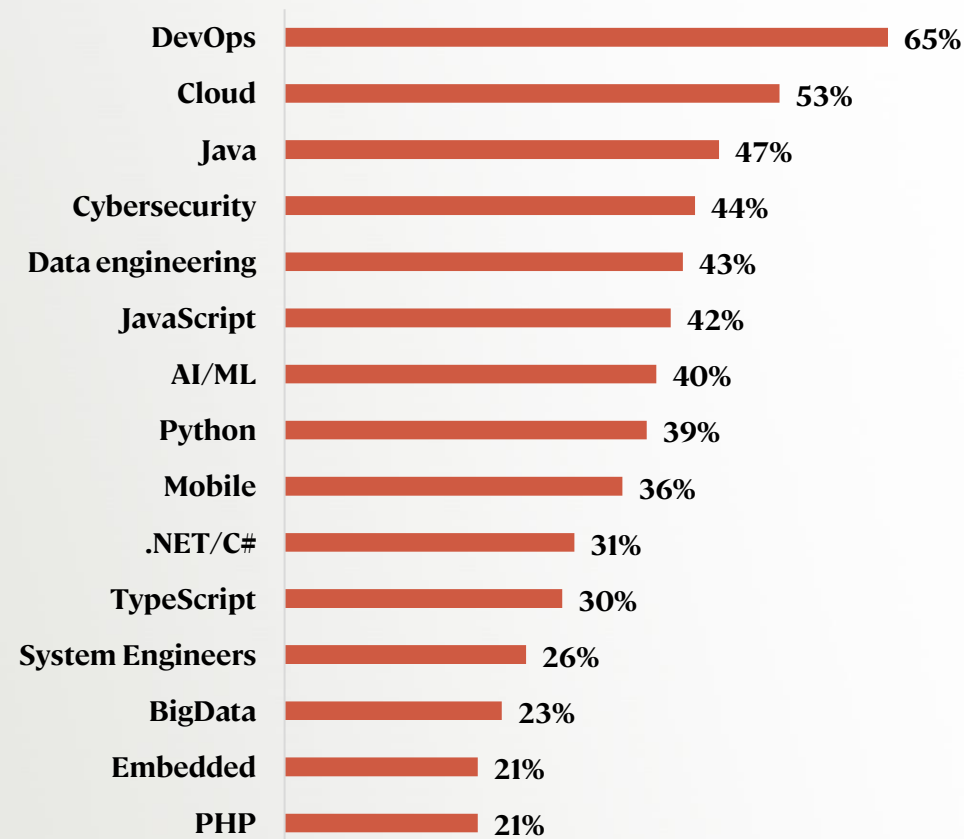
40% of Krakow IT employers hire AI, ML, or both specialists, highlighting the strong demand for expertise in these fields.

The most common tech skillsets among Krakow IT employers are DevOps (65%), Cloud (53%), and Java (47%). This suggests that regardless of tech stack, all aspects of CI/CD and, broadly speaking, cloud platforms are in demand. Java remains the most popular tech stack on the backend, but TypeScript continues to gain traction, now approaching the level of .NET.

DevOps

The most common set of tech skills among Krakow IT employers

Share of Krakow IT employers with specific in-house tech skills



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Krakow IT Market Map

IT talent in Krakow

IT talent by hub size

77%

Of Krakow’s IT hubs employ up to 100 people

37%

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

The IT landscape in Krakow is dominated by small and mid-sized IT hubs, with 77% of firms employing up to 100 people. However, when it comes to IT talent concentration, the story shifts: large enterprises (IT hubs with 1000+ employees) make for just 3% of companies but hold a massive 37% share of the IT talent pool. Meanwhile, mid-sized firms (101-500 employees) also play a key role, hosting 31% of IT talent.

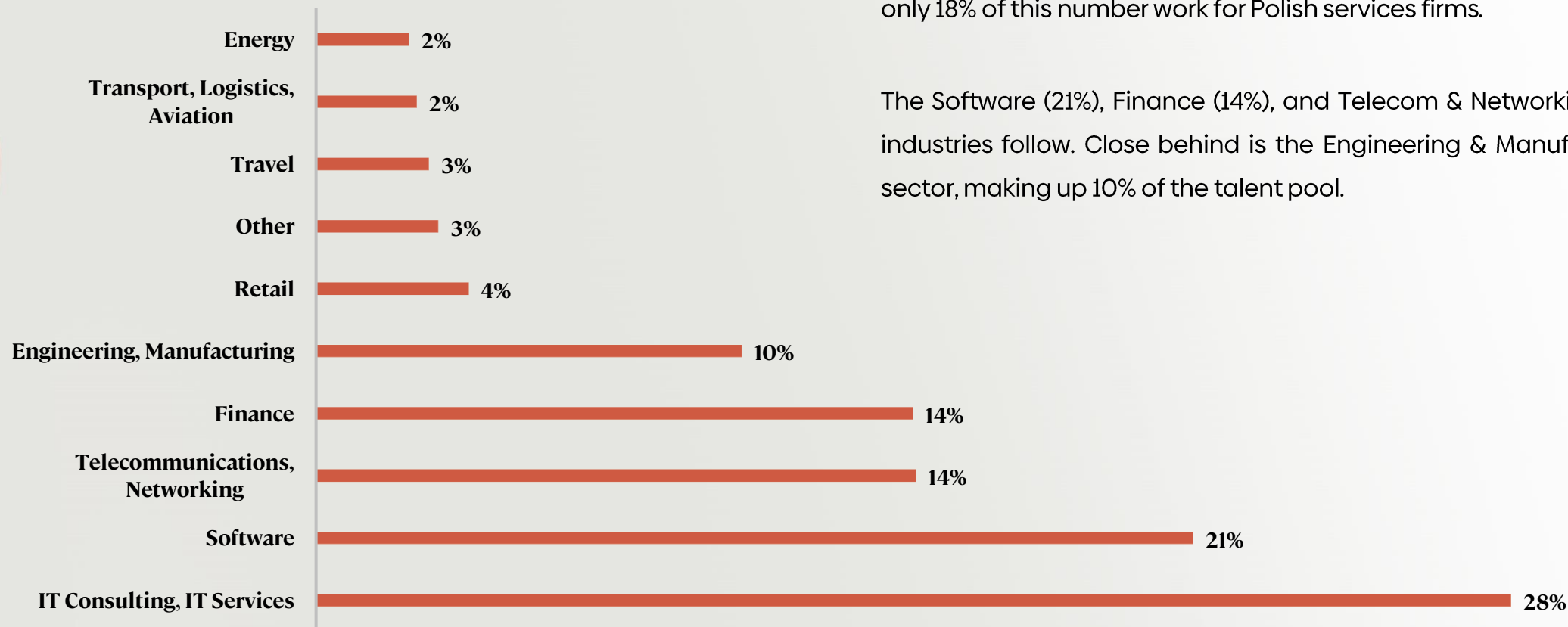
These insights highlight a market with many smaller players, but the majority of IT professionals work in larger organizations.

IT hub size	% 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 industry

The IT Consulting and Services sector employs the largest share of IT specialists in Krakow, accounting for 28% of the workforce; however, only 18% of this number work for Polish services firms.

The Software (21%), Finance (14%), and Telecom & Networking (14%) industries follow. Close behind is the Engineering & Manufacturing sector, making up 10% of the talent pool.



IT talent by company's origin

31%

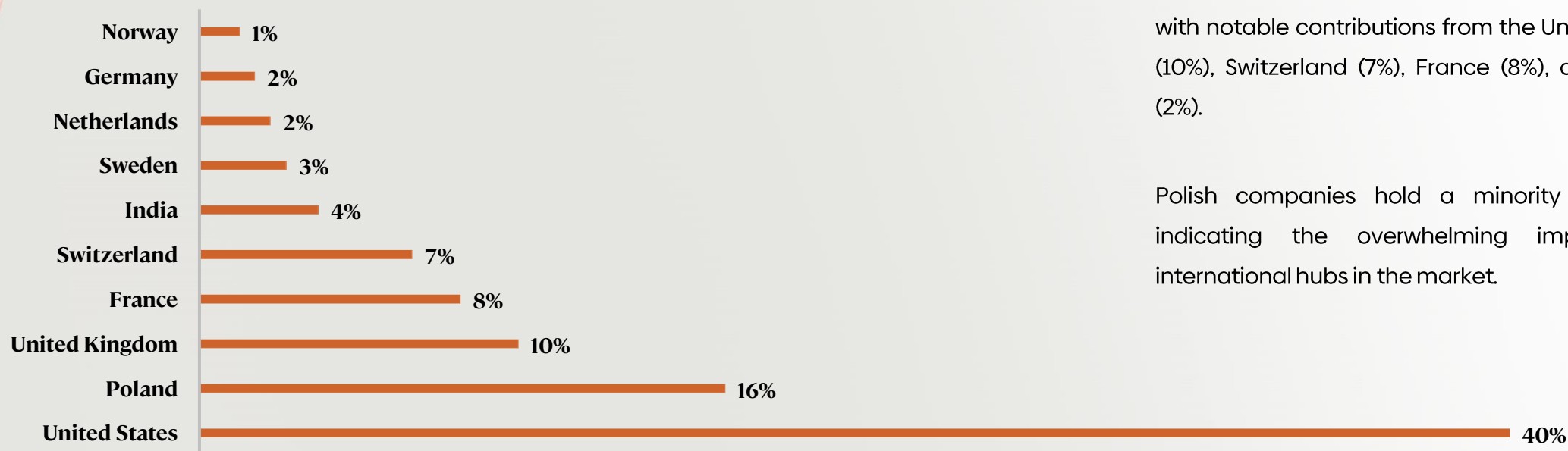
Share of talent pool
working for EU
companies (inc.
Poland)

18%

Share of talent pool
working for
European non-EU
companies

40%

Share of talent pool
working for US
companies



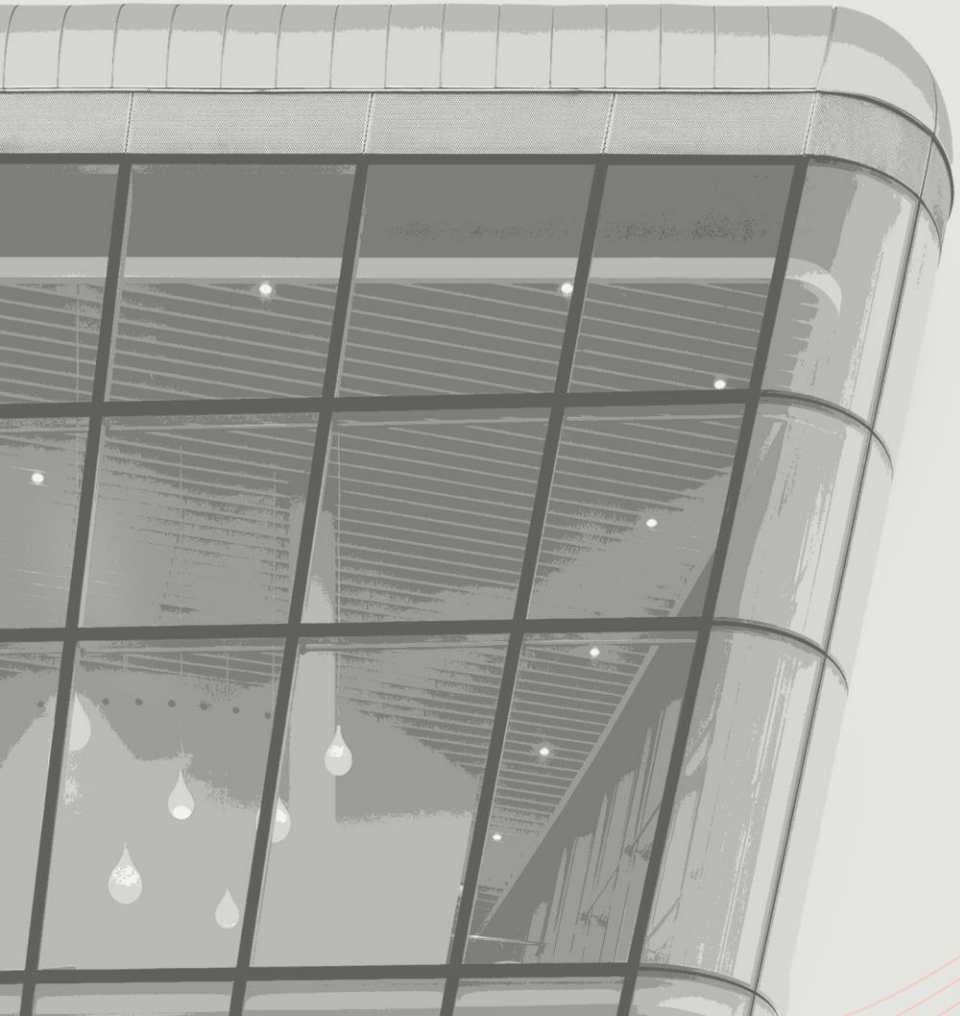
The largest share, 40% of Krakow's IT employees, is employed by American companies.

Companies from Western Europe collectively represent a significant portion of IT employment, with notable contributions from the United Kingdom (10%), Switzerland (7%), France (8%), and Germany (2%).

Polish companies hold a minority share (16%), indicating the overwhelming importance of international hubs in the market.

Krakow IT Market Map

Largest IT employers



Largest IT employers

Key findings

2.5k

Hired by Comarch,
#1 largest IT
employer in Krakow

16k

IT specialists
employed by the top
10 largest IT
employers

10

Companies with IT
headcount over
1000 people

51

Companies with IT
headcount over 200
people



Largest IT employers

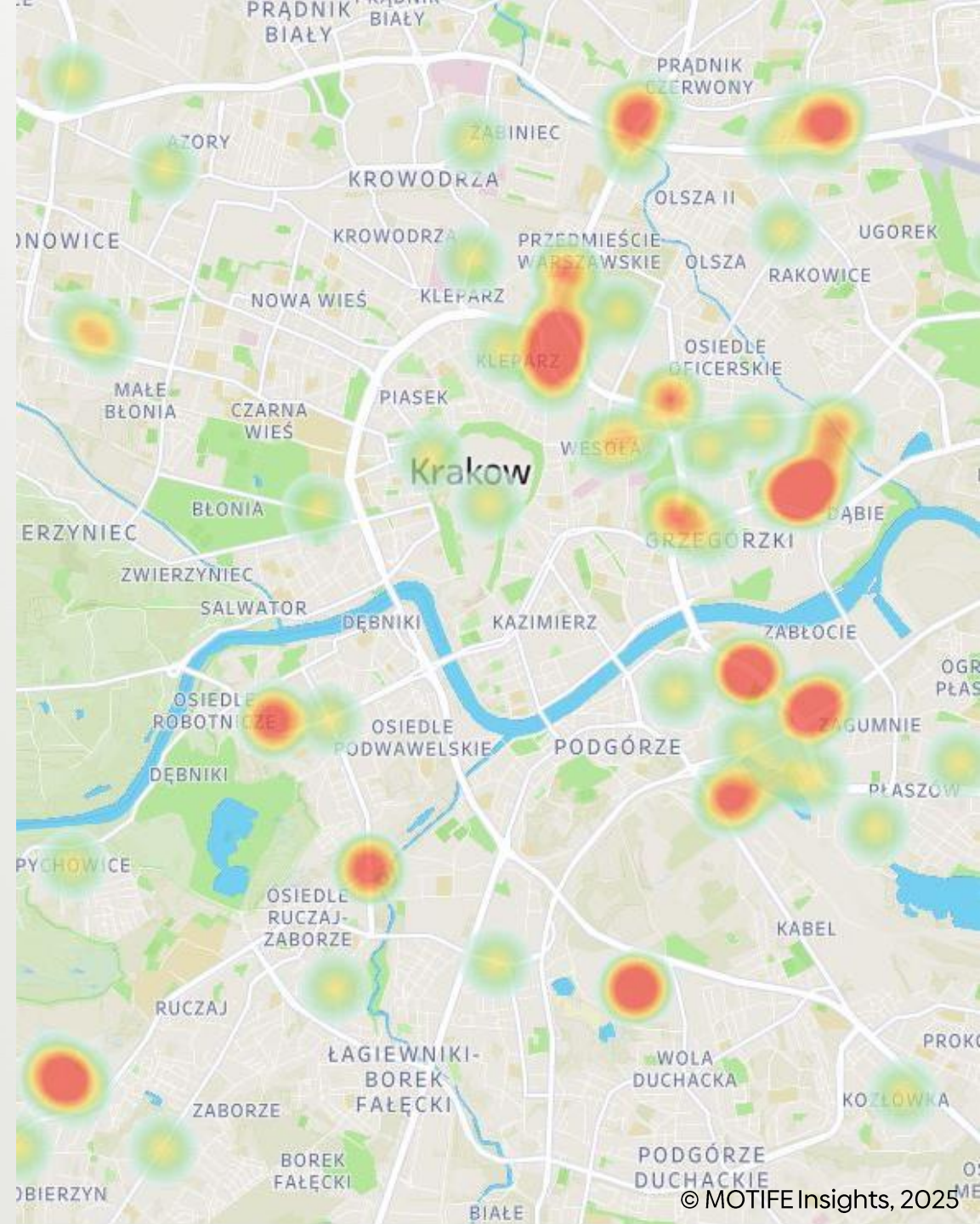
Office locations

Heatmap of Krakow's 100 largest IT employers

The Krakow IT Market Map highlights the office locations of the top 100 largest companies hiring IT specialists in the city, with IT headcounts ranging from 60 to 2 500 employees. A clear trend emerges tech companies in Krakow tend to establish their offices in the city center and southeastern districts, where modern business infrastructure is most concentrated.






The largest office complexes in the densest areas include High Five (62 000 m²), Unity Center (42 000 m²), Fabryczna Office Park (32 000 m²), Brain Park (30 000 m²), Ocean Office Park (28 500 m²), and Zablocie Business Park (26 000 m²).

While Krakow doesn't have a single tech district akin to London's Silicon Roundabout or Berlin's Mediaspree, it has organically developed multiple thriving IT clusters.



Largest IT employers

Largest IT employers in Krakow (#1-10)

#	Company	Industry	IT headcount▼	Total headcount	Country of origin
1	COMARCH	Software	2 550	3 020	Poland
2	• APTIV •	Engineering, Manufacturing	2 100	3 650	United States
3	 CISCO	Telco, Networking	2 100	2 910	United States
4	 MOTOROLA SOLUTIONS	Telco, Networking	1 750	2 550	United States
5	<epam>	IT Consulting, IT Services	1 700	1 950	United States
6	HCL	IT Consulting, IT Services	1 450	1 750	India
7	Capgemini 	IT Consulting, IT Services	1 250	4 800	France
8	 HSBC	Finance	1 250	2 801	United Kingdom
9	Sabre	Travel	1 050	1 200	United States
10	 UBS	Finance	1 000	5 100	Switzerland

#1

Comarch is the largest IT employer in Krakow

16k










IT specialists employed by the 10 largest companies

5

Of these top 10 companies have their headquarters in the USA









Largest IT employers

Largest IT employers in Krakow (#11-20)

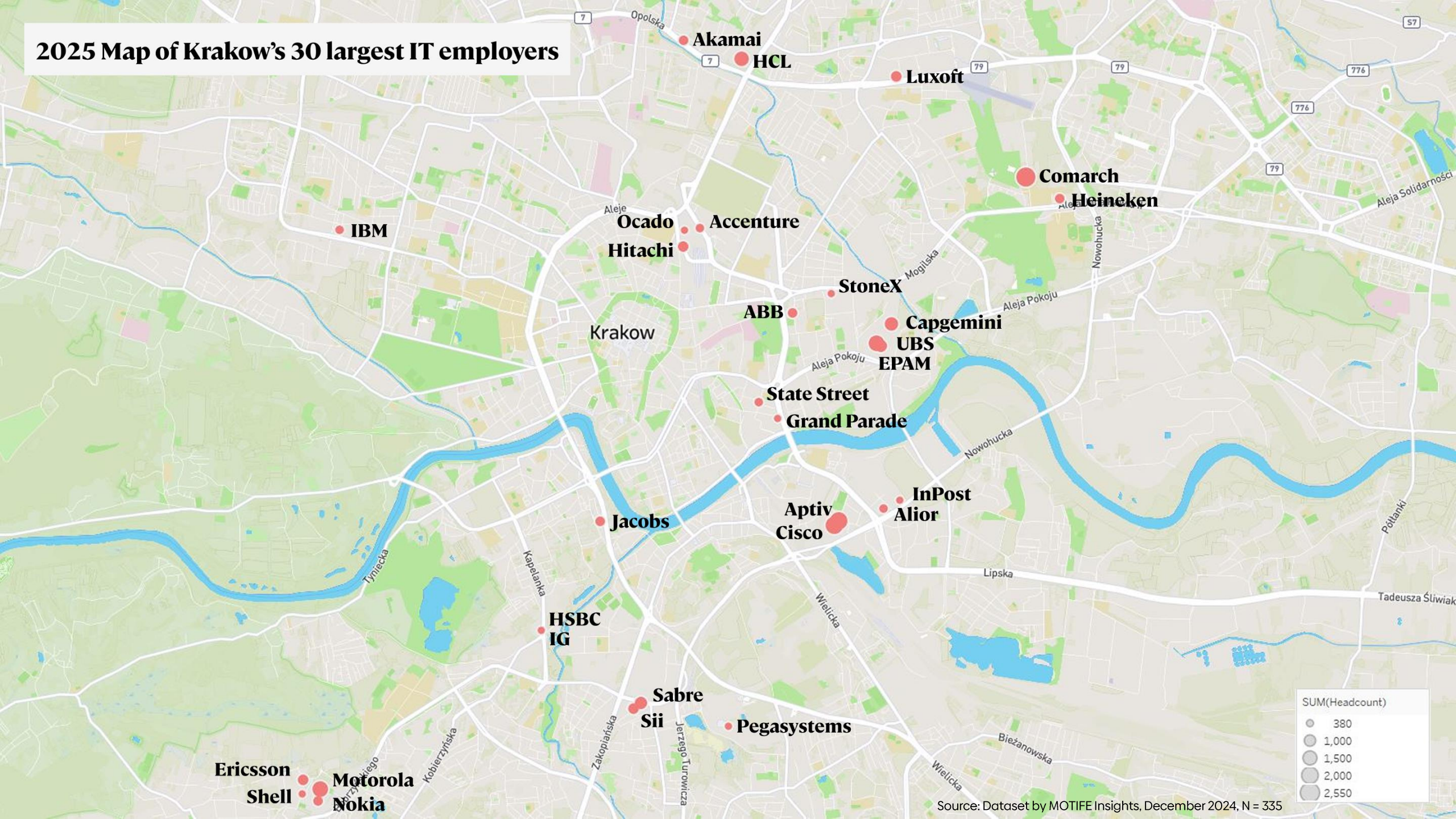
#	Company	Industry	IT headcount▼	Total headcount	Country of origin
11	 ERICSSON	Telco, Networking	850	1 100	Sweden
12		Software	850	900	United States
13		IT Consulting, IT Services	800	1 050	Switzerland
14		IT Consulting, IT Services	800	860	France
15	 ★ Heineken®	Other	650	2 100	Netherlands
16		Engineering, Manufacturing	650	2 000	Switzerland
17	Nokia Networks	Telco, Networking	650	850	Finland
18		Telco, Networking	550	1 023	United States
19	 ALIOR BANK	Finance	500	1 750	Poland
20	 > accenture	IT Consulting, IT Services	500	1 300	Ireland

Largest IT employers

Largest IT employers in Krakow (#21-30)

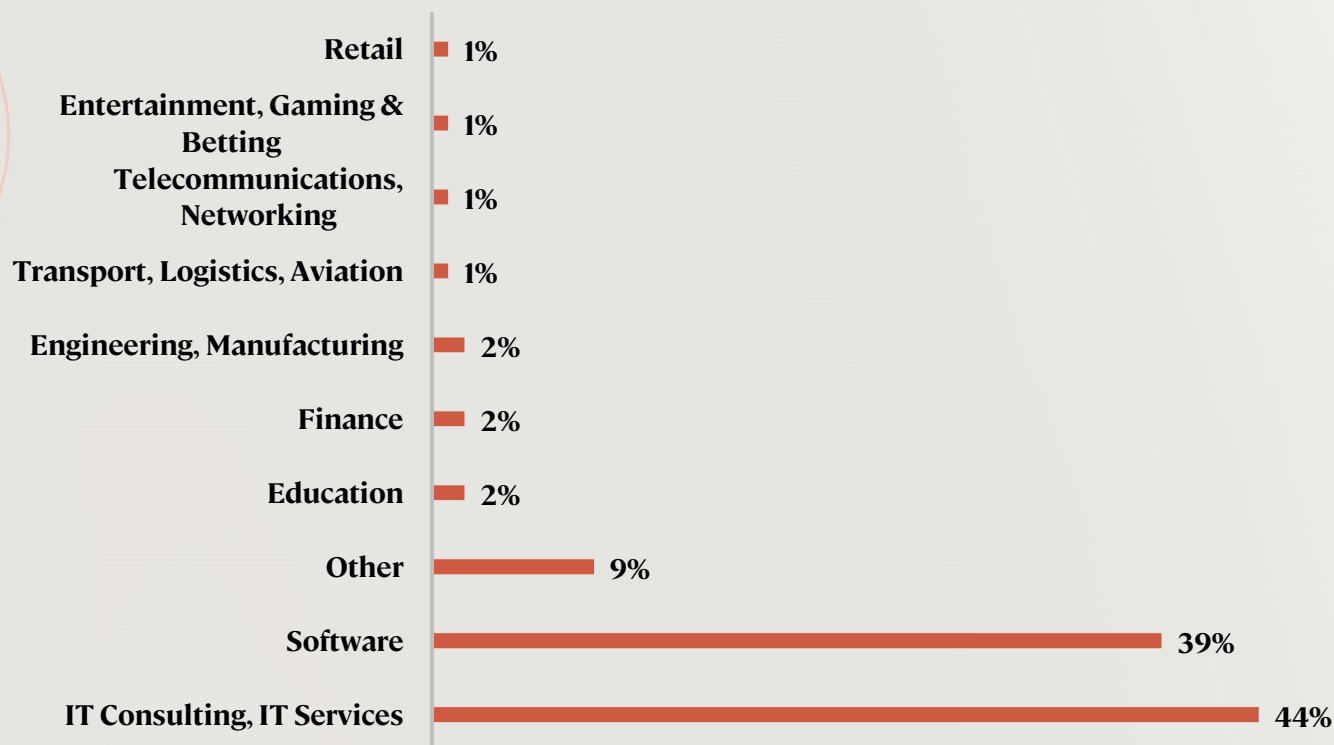
#	Company	Industry	IT headcount▼	Total headcount	Country of origin
21	 Hitachi Energy	Software	490	1 450	United States
22	 STATE STREET	Finance	450	6 450	United States
23	 ocado	Retail	420	500	United Kingdom
24	StoneX [®]	Finance	410	500	United States
25		Energy	400	5 000	United Kingdom
26	 PEGA	Software	400	460	United States
27	 InPost out of the box	Transport, Logistics, Aviation	380	700	Poland
28	IG	Finance	380	650	United Kingdom
29	 GRAND PARADE	IT Consulting, IT Services	380	400	United Kingdom
30	 BROWN BROTHERS HARRIMAN	Finance	370	1 650	United States

2025 Map of Krakow's 30 largest IT employers



Polish companies

Polish companies employing IT specialists in Krakow by industry



16%

Share of IT talent pool that works in Polish companies

44%

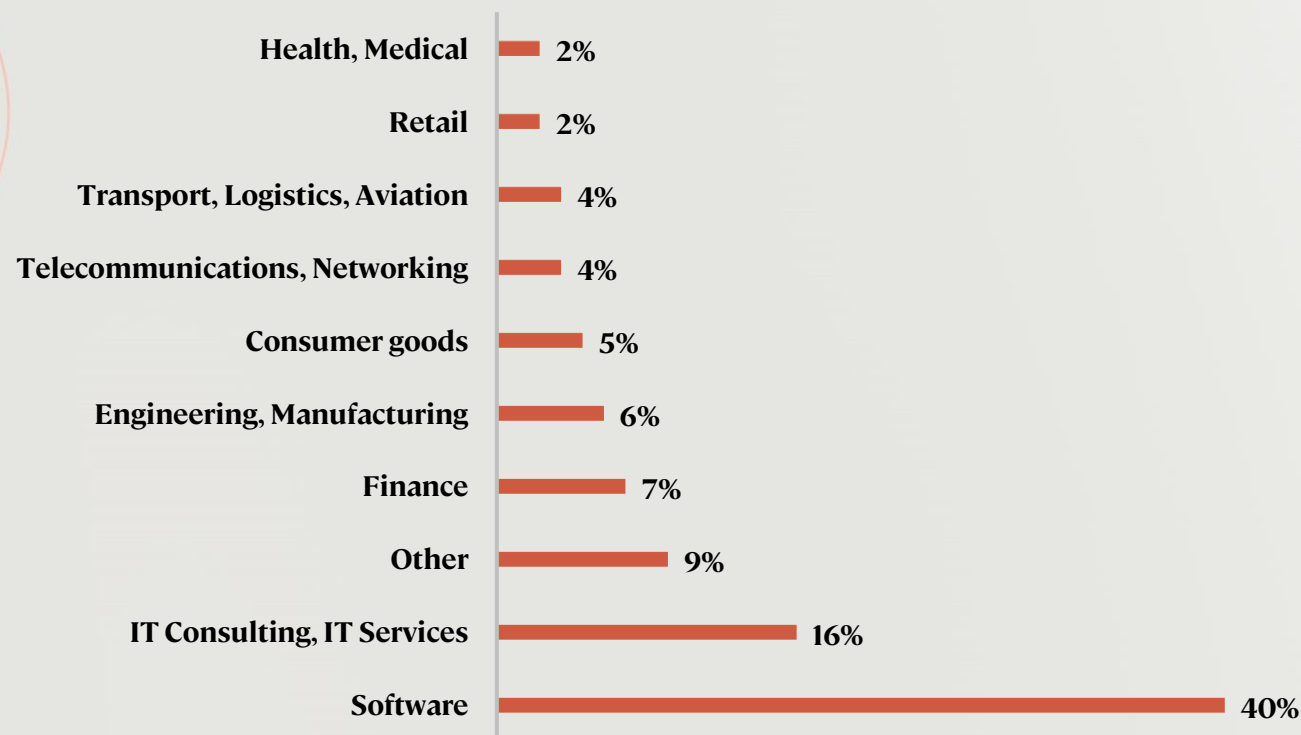
Polish IT employers in Krakow belong to the IT Consulting, IT Services industry

The data reveals that Polish companies employ 16% of the total IT talent pool in Krakow, which translates to approximately 7 500 IT specialists.

In Krakow, 44% of Polish companies hiring IT specialists operate in the IT Consulting & Services sector, making it the leading. Additionally, 39% of these companies belong to the Software industry, further highlighting Krakow's strong position as a hub for IT service providers and software development. Together, these industries play a significant role in shaping the city's tech ecosystem and driving local employment.

American companies

US companies hiring IT specialists in Krakow by industry



40%

Of the IT talent pool works in the US companies

American companies play a key role in Krakow's employment landscape, accounting for approximately 40% of the total workforce.

Among the US IT hubs operating in the city, 40% specialize in software development, reinforcing Krakow's position as a major center for software engineering. Another 16% focuses on IT consulting and IT services.

Additionally, US employers from Finance (7%) and Engineering and Manufacturing (6%) reflect a growing diversification of Krakow's tech ecosystem and signal potential for further expansion in these industries.

40%

Of the US IT employers in Krakow are in the Software industry

Krakow IT Market Map

Women in IT

Women in IT

14 - 42%

A range of share of woman in IT at companies who filled our survey

20%

Share of women in IT countrywide*

Key findings emerge from data covering 13 500 IT specialists (3 800 women) across 68 Krakow IT companies:

- **Wide variation:** A large gap exists in female representation, with the top companies employing women in IT roles at three times the share compared to the bottom-ranking companies.
- **Size matters:** Larger organizations (100+ IT staff) generally have a higher proportion of women specialists.
- **Sample vs. average:** The surveyed companies' average female representation (approx. 28%) is higher than the Polish national average (around 20%), suggesting the sample potentially over-represents more diverse firms.











Source: Dataset by MOTIFE Insights, December 2024, N = 77

*IT Community Research Report 2025, BulldogJob



Women in IT

Survey: Largest employers of women in IT in Krakow

#	Company	Industry	Female IT headcount ▼	Share of IT headcount
1	 CISCO	Telco, Networking	826	39%
2		IT Consulting, IT Services	511	30%
3		Engineering, Manufacturing	273	42%
4		IT Consulting, IT Services	238	29%
5		Software	162	19%
6		IT Consulting, IT Services	138	25%
7		Finance	115	28%
8	 PEGA	Software	100	25%
9		Retail	96	32%
10		Software	84	35%

2.5k

Female IT specialists
employed by these
10 companies

30%






Average share of
women in IT headcount
in these 10 companies

826

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





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		Engineering, Manufacturing	42%	273
2		Telco, Networking	39%	826
3		IT Consulting, IT Services	30%	511
4		IT Consulting, IT Services	29%	238
5		IT Consulting, IT Services	25%	138




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	Transport, Logistics, Aviation	50%	60
2	 zendesk	Software	35%	84
3	 GE HealthCare	Health, Medical	35%	69
4	N-iX	IT Consulting, IT Services	34%	51
5	 euroclear	Finance	34%	49

Women in IT

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

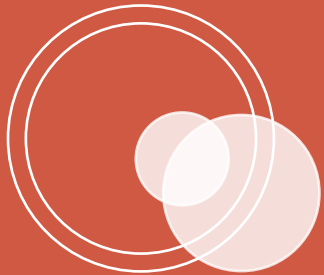
#	Company	Industry	Share of IT headcount	Female IT headcount
1	ActiveCampaign >	Software	46%	15
2	 Electrolux	Engineering, Manufacturing	42%	31
3	creativestyle	IT Consulting, IT Services	41%	18
4		IT Consulting, IT Services	40%	16
5	 miquido	IT Consulting, IT Services	35%	35

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Krakow IT Market Map

About MOTIFE

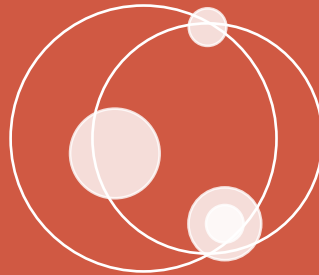
Our services



Recruitment & RPO

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Staff Augmentation & EOR

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- Entity and operations setup
- Office setup
- Entity back-office operations

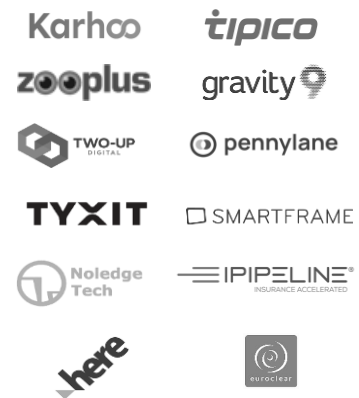
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Asia, Middle East



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