



# GBS Next Stop: Łódź, Poland

Exploring the Future of Global  
Business Services in Łódź

November 2025

Publication Partners



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### Glossary

|             |                                       |            |                            |
|-------------|---------------------------------------|------------|----------------------------|
| <b>AI</b>   | Artificial Intelligence               | <b>KPI</b> | Key Performance Indicator  |
| <b>BPO</b>  | Business Process Outsourcing          | <b>ML</b>  | Machine Learning           |
| <b>BSC</b>  | Business Services Center              | <b>O2C</b> | Order to Cash              |
| <b>CoE</b>  | Center of Excellence                  | <b>P2P</b> | Procure to Pay             |
| <b>FTE</b>  | Full Time Equivalent                  | <b>RPA</b> | Robotic Process Automation |
| <b>GBS</b>  | Global Business Services              | <b>RTR</b> | Record to Report           |
| <b>KI</b>   | Knowledge Intensive                   | <b>SSC</b> | Shared Services Center     |
| <b>KIBS</b> | Knowledge Intensive Business Services |            |                            |

# Preface



**Piotr Jarosz**  
Partner Associate  
Shared Services and  
Outsourcing Advisory  
KPMG in Poland



The city of Łódź has long been a place where transformation is not an abstract idea, but a first-hand experience. Few European cities show as clearly how industrial heritage, academic strength, and a culture of resilience can be the foundation of a thriving business services center. In the past twenty years Łódź has steadily built its place, on the GBS map. Today, it is a city where international organizations find ambition and talent to support long-term evolution. What differentiates Łódź is how the business environment combines technological readiness with a human approach to change. Companies operating here gradually

understand that the future of GBS rests on more than just digital tools; it needs people who are curious, collaborative, and hungry to extend their skills all the time. This is supported by the fact that the local ecosystem comprises: universities that keep close to business needs, employers that invest in development, and public institutions that recognize how vital the sector has become for the city's economic identity. As GBS sector inevitably shift toward knowledge-intensive and AI-enabled functions, Łódź continues to show it can adapt – and that it is prepared to do so responsibly. The city offers scale without losing its sense of

community, and competitiveness without compromising on quality. For business navigating shifting expectations and accelerating transformation, this combination is increasingly valuable. This report reflects the ongoing local business commitment to understand and strengthen the GBS landscape in Łódź. It is also an invitation to look at the city not only as a cost-effective location - but also as a place where talent, innovation, and partnership can thrive. Ultimately, the story of Łódź is that of people and organisations choosing to build something resilient together, and that is what makes its business future so compelling.

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# Preface



## Sebastian Sala

Business Unit Director,  
SSC/BPO, Banking & Insurance,  
ReX Recruitment Exchange

Antal



As global organizations operate in a rapidly changing and competitive environment, access to skilled talent and reliable insights remains essential for informed strategic decision-making.

Łódź, with its fast-growing modern business services sector, continues to strengthen its position as a location capable of supporting and scaling globally relevant operations.

As a company specializing in recruitment and outsourcing, Antal recognizes that access to skilled talent is crucial for the growth and success of global organizations. Our analysis is based on

a complex dataset and ongoing monitoring of key talent pools, workforce trends, and skills availability, complemented by Antal's proprietary data, methodological support, and analytical expertise applied throughout the project.

We examined the growth potential of the Global Business Services sector in Łódź through a comprehensive analysis of workforce-related dimensions. This approach highlights how Łódź stands out thanks to its strong academic base, employees with foreign language skills, and a diverse ecosystem enabling professional development. By regularly tracking talent

availability and market dynamics, Antal underscores Łódź's position as a preferred destination for international business operations, where organizations can rely on a rich pool of qualified professionals and continuous opportunities for workforce growth.

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# Preface



INVEST IN ŁÓDŹ

## Mateusz Sipa

Head of Business Development and  
International Relations Bureau

City of Łódź



Over the last two decades, Łódź's modern business services market has undergone one of the most dynamic transformations in the country. From simple operational processes 20 years ago, the sector has developed into a fully advanced ecosystem of skills, knowledge and innovation, employing over 30,000 specialists in more than 130 business service centers. The strength of the Łódź's market lies in the synergy between the city, business and science; local initiatives, administrative support and investments attract leaders in modern services and enable further development of the sector on an international scale.

Our city successfully attracts global investors by offering an extremely wide range of support – from efficient administration and investment consulting to partnership-based cooperation at the stage of business development and expansion. Today, Łódź is a friendly environment that ensures that every investor, regardless of size, feels well taken care of.

The result of the synergy between local government and business is a growing number of shared service centers, centers of excellence and companies implementing technological innovations. Thanks to the involvement of local

universities and specialized staff, Łódź offers a continuous stream of expertise ready to implement the most demanding projects.

It is the city's openness, the flexibility of its administration and its partnership-based approach that form the foundations of Łódź's success in the modern business services sector. By working together – as administration, business and academia – we are not only consistently strengthening Łódź's position in Poland and Europe, but also providing real value to international organizations looking for a place to grow.

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Image: Tram Center Piotrkowska from above, p.c. Zieliński.

As global enterprises seek to enhance agility and cost-effectiveness to adapt to rapidly evolving economic landscape, the role of business process centralization has become more significant.

The City of Łódź, emerges as a one of key players in this domain, offering a compelling environment for the development and expansion of Global Business Services sector. With its

strategic location in the heart of Europe and an infrastructure tailored for modern business needs, Łódź stands out as a prime destination for global business services, shared services centers, and outsourcing operations.

This report provides a comprehensive analysis of Łódź’s crucial role as a hub for the GBS sector development. It highlights the city’s proactive strategies in creating a business-friendly environment, its substantial investment in technology and infrastructure, and its commitment to fostering a skilled workforce through its numerous educational institutions.

These factors collectively make Łódź an attractive location for business process centralisation activities, offering scalability and strategic advantages to international firms.

We will explore the continuous growth potential of the GBS sector in Łódź, supported by local favorable economic policies and the city’s strategic initiatives to attract and retain high-value business services. The insights presented will demonstrate why Łódź is not merely adapting to the demands of global business but is setting benchmarks for innovation and efficiency in the business process management sector.

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A city aligned with the **sustainable development** and the **circular economy**

Center focusing on **knowledge-based business**



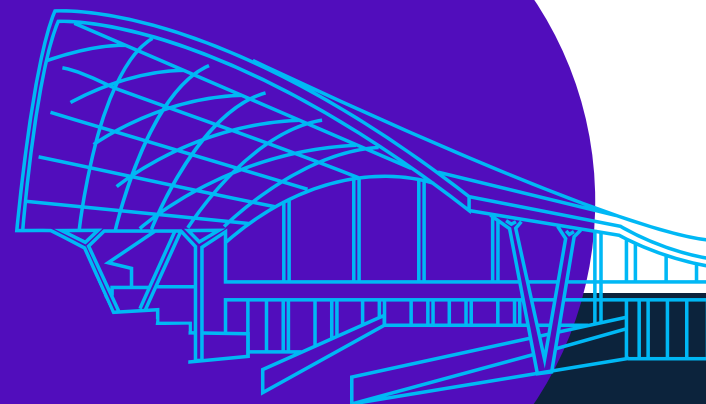
A **strategic logistics hub** for the CEE region



**Post-industrial identity of the city**



**Already established** GBS ecosystem



**Central location in the heart of Europe** with convenient transport infrastructure



A municipality featuring **intelligent and sustainable infrastructure**



Large academic base with over **17,000 graduates annually**



**Lowest operational costs** among Poland top 5 biggest cities



**Rising nearshoring hub**

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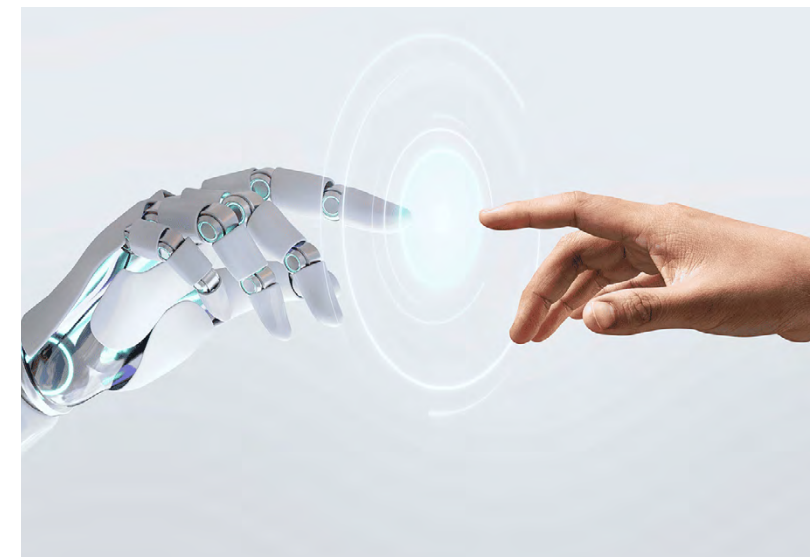
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# Trends in business services sector destination

# New working models are changing job market – Shared Service Centers, Global Business Services, Centers of Excellence and others



In the last few years, we have observed new trends emerging in the enterprise sector, as the rapidly changing global environment forces companies to implement new ways of working, collaborating and leading.

Well-established business models, such as Shared Services Centers and Outsourcing companies, that were the leading frameworks for international organizations in the 90s and at the beginning of the 21st century, started to be displaced in the second decade by more sophisticated, mature and advanced Global Business Services. From 2020, the year of a global pandemic, we can see that organizations are evolving to be even more flexible and independent, adjusting to the new reality and becoming digital-enabled GBS centers.

This model not only allows to provide complex end-to-end processes and value-focused business services but also unleashes the full potential of standardization, automation and decision-making, as it assumes increased responsibility and independence of the GBS and uses the newest technology such as RPA or visualization tools.

There are several key factors to successfully establishing a GBS center. One of the most important ones is setting up the Service Delivery Model, which allows organizations to classify their business processes as services, providing a leading practice point of view on how to operate. The Service Delivery Model consists of 5 dimensions: what, where, who, with, and how. It captures processes, roles, and locations that are crucial to stand up and run GBS and gives the organization an overview of areas that it should focus on.

The **what** dimension evaluates how each process adds value to the business and what is the impact of a particular activity; it describes the nature of the work. It can be categorized into three groups: Site Partner, Performance Center and Centers of Expertise. In the case of GBS centers, organizations shift to the third group, being involved both in transactional processes as well as performing more independent, knowledge-based activities. Since 2020 sustainable growth of knowledge-intensive processes offered by entities is one of the most important trends observed in the sector. According to KPMG studies, in 2022 knowledge-based processes were, for the first time, the majority of all processes offered by GBS centers (50,8% of all processes compared to 44,3% in 2019). Procurement, Legal, R&D, Knowledge Management or complex Finance functions such as Budgeting or Tax are just a few

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of the services that have emerged in the past few years in Polish centers.<sup>1</sup>

The **where** dimension is quite self-explanatory and enables choosing a location which can be understood as proximity (local/regional/global) and presence (virtual/office). GBS by its nature falls into the “global” category and can use both office and virtual presence, although the current focus in the enterprise sector is more on flexible and remote-based systems. For the past few years term “work-life balance” is no longer an empty word, but it raised to be one of the most important factors of employee satisfaction. 75% of employees believe that a hybrid model of working is a key component of work flexibility; studies show that we should not wait for “going back to normal” – digital and remote work is the new norm.<sup>2</sup>

The **who** dimension establishes the entity to perform processes. Possible options are: external, internal and automated. GBS centers are focusing on achieving the third way in as many processes as possible so that they can focus on knowledge-based activities. The first category is typical for Outsourcing centers and the second one – is for SSCs. In past years the importance of RPA and AI tools has been growing, showing that GBS centers are focusing on hyper automation, which drives effectiveness and allows to broaden the scope of services; some of the processes that cannot be automated, are being placed in outsourcing centers. The general trend is to

<sup>1</sup> TheBSSTour\_Lodz2022\_Knowledge-based\_decision-making\_processes.pptx (kpmg.com).

<sup>2</sup> Talent Trends 2023 in Poland Michael Page.

extend the portfolio of knowledge-intensive services by pushing out more rules-based tasks by either automation or outsourcing.<sup>3</sup>

The **with** dimension answers the question of how individual roles and activities will be integrated with one another in the organization. The outcome depends on answers given in dimensions what, where and who. Fully developed, digital GBS is a multi-functional operating unit with multi-channel business service delivery synced end-to-end, which means it is an equal partner to corporate functions and business units, rather than simply service-provider. More and more GBS are becoming Centers of Expertise; this is possible thanks to highly qualified staff and well-established governance on the organizational level. 88% of enterprise leaders expect GBS to take the lead in integrating knowledge and data in managing end-use customer interactions.<sup>4</sup>

The **how** dimension is crucial for GBS centers, and it corresponds to infrastructure and supporting processes required to manage delivery components as well as maintaining the level of services. It is essential for organization to be prepared both technologically and knowledge-wise to establish the most advanced form, which is GBS. KPMG studies show that expectations placed on GBS are high: 65% of sector leaders expect that GBS will be a key player in integrating

<sup>3</sup> Top 10 digital trends in global business services for 2023DATAQUEST (dqindia.com); (22) GBS Outsourcing Trends that impact the success of your GBS Service Delivery Model | LinkedIn.

<sup>4</sup> SCB GBS PL - report\_final\_23.03.2022.pptx (kpmg.com).

and coordinating intelligent automation efforts; 77% of them want business services governance to be extended in full scope, from front-office to back-office services<sup>5</sup>.

These five dimensions are guidelines for any organization that aims for a more mature structure and seeks opportunities to run the business more effectively, providing the highest level of service delivery.

The new service delivery model has many advantages, besides the obvious ones like cost-cutting or standardization of processes, which is also offered by Shared Service Centers and Outsourcing. Since the approach is more knowledge-based, GBS centers are power hubs of skills, experience and specialized knowledge, which not only allows to perform tasks automatically but also has other highlights. Once processes are run independently from business units, there is much more space for automation and working with RPA. Having specialized teams gives the opportunity to broaden the scope of activities by less repetitive or procedure-based tasks. It also allows to perform automation or even implementation of AI in-house, having experienced IT employees in center. Independence given by the GBS structure also opens the possibility for flexible process management within the entity; organizations can choose which activities can be done in GBS itself, automate the repetitive ones and outsource some of the scope to specialized hubs.

<sup>5</sup> TheBSSTour\_Lodz2022\_Knowledge-based\_decision-making\_processes.pptx (kpmg.com).

It is clear that GBS centers and this particular model are already the leading standard of service delivery. We can see that more and more organizations are aiming for it, as it allows better decision-making, talent management and full process ownership. In years to come, we can expect not only steady growth of a number of Global Business Services but also shifting to fully developed, digital-enabled centers with the demand-driven delivery models.

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# Poland as business services sector destination

Poland stands as a beacon of investment opportunity in Europe, distinguished not only by its strategic geographic location but also by its economic indicators and human capital.

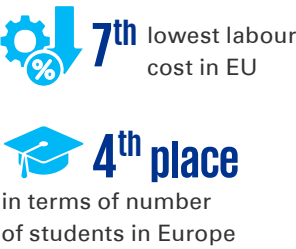
As the seventh country in the European Union with the lowest labor costs, Poland offers a cost-effective yet highly skilled workforce, further enhanced by its position as fourth in terms of the number of students in Europe. This educational strength is reflected in the predominant fields of study: Business, Law & Administration, Health & Social Care, and Technology, Science & Construction, which align well with the needs of a modernizing economy.

Located centrally on the European continent, Poland serves as a critical transit point for trade and logistics between the east and west, north and south. The country has more than 5,000 kilometers of motorways and expressways, with plans to expand further, facilitating efficient ground transportation across the continent. This infrastructure is complemented by 13 international airports, including major air hubs in Warsaw, Katowice, and Gdańsk, enhancing Poland's accessibility and connectivity. Moreover, Poland's strategic maritime ports in Szczecin, Świnoujście, Gdynia, and Gdańsk underscore its importance as a gateway for maritime trade in the Baltic Sea.

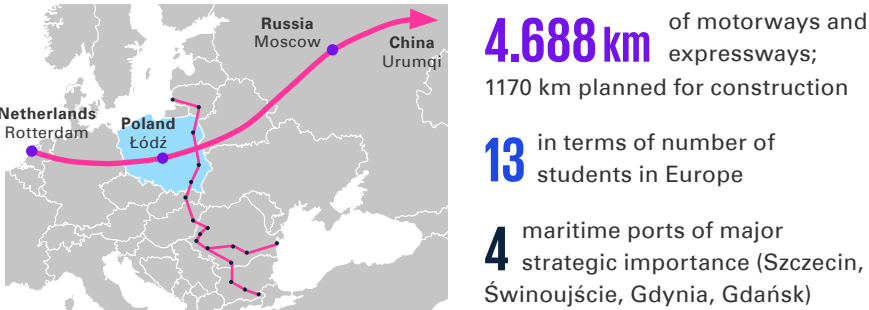
The investment potential in Poland is notable, with the country ranking third in Europe for greenfield investments in 2023. This reflects a growing confidence among global investors,

Advantages of the Polish market

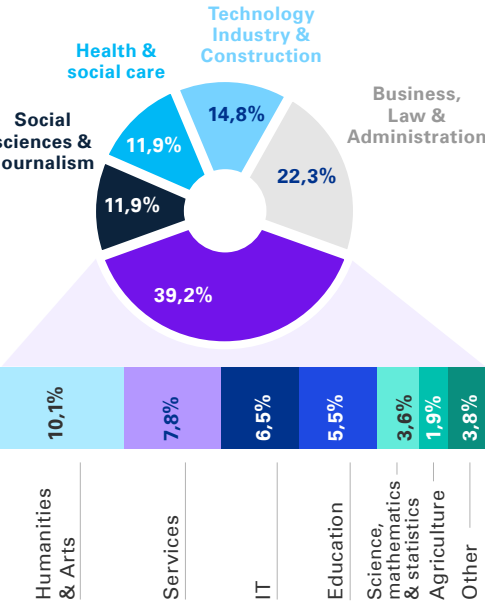
Human capitals & labour costs



Strategic location in the heart of Europe



Main study fields <sup>(1)</sup>

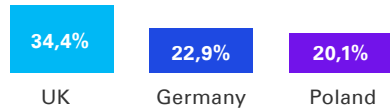


Dynamic growth of Business Service Sector

(from 50k employees to 400k) <sup>(2)</sup>

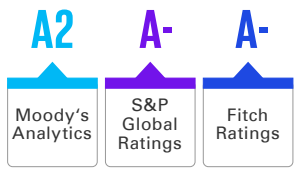
Investment potential

3<sup>rd</sup> place in greenfield investments in Europe in 2020 (FDI; bn USD) <sup>(3)</sup>

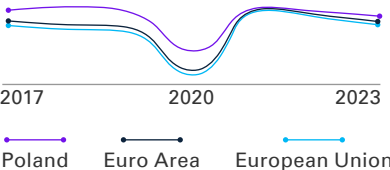


Reliable and strong economy

Poland's credit ranking



GDP growth – constant prices (%)



<sup>(1)</sup> Source: Statistics Poland (GUS) – Education; <sup>(2)</sup> Source: Polish Investment & Trade Agency; [www.paih.gov.pl/Expertise\\_across\\_a\\_variety\\_of\\_sectors](http://www.paih.gov.pl/Expertise_across_a_variety_of_sectors); <sup>(3)</sup> Source: The FDI Report 2021. Global greenfield investment trends.

driven by the country’s stable economic climate and favorable investment conditions. Poland’s strong economic reliability is further affirmed by solid credit ratings from major international agencies, including Moody’s and S&P, which cite its resilient economic growth and robust financial health.

The dynamism of Poland’s economy is particularly evident in the business services sector, which has seen exponential growth from 50,000 employees in 2006 to an estimated 400,000 by 2021. This sector’s expansion is a testament to Poland’s conducive business environment and its ability to adapt to global economic trends, making it a strategic choice for investors looking at sectors with significant growth trajectories.

In conclusion, Poland’s blend of strategic geographic positioning, compelling economic

stability, and rich human capital makes it an outstanding choice for investors seeking to tap into the European market. Its ongoing infrastructure developments and the dynamic growth in the service sector only add to its allure, positioning Poland not just as a hub for business operations but also as a key player in Europe’s economic future.

In the first quarter of 2024, Poland solidified its position as a central hub in the European business services landscape, hosting more than 1800 Business Process Outsourcing (BPO), Shared Service Centers (SSC), Global Business Services (GBS), IT Outsourcing (ITO), and R&D centers. This figure underscores the country’s strategic commitment to fostering a conducive environment for both domestic and international investors, with 72% of these centers being foreign-owned, illustrating global confidence in the Polish economy.



The distribution of these centers is not random but strategically aligned with the urban and economic development plans of various Polish cities. Warsaw, the capital, leads with 356 centers, leveraging its metropolitan allure and infrastructure which makes it an attractive location for multinational corporations. Meanwhile, Krakow and Wroclaw, with 284 and 220 centers respectively, capitalize on their rich educational resources and tech ecosystems to host a community of service centers. Krakow, known for its academic excellence, draws companies that benefit from access to fresh talent and research capabilities. Wroclaw’s strategic location and advanced logistical infrastructure make it a preferred choice for companies looking at seamless connectivity within Europe.

These centers are not just crucial in their service output but are also major employment drivers. Cities like Łódź and Katowice showcase substantial growth in this sector, with Łódź hosting 134 centers and Katowice, demonstrating significant engagement with 134 centers, reflecting their emerging status as business service hubs. The scale of employment varies, with the larger cities not surprisingly housing more employees, but the impact on local economies is profound across all locations. This sector’s growth has catalyzed urban development, stimulated secondary businesses, and has had a multiplier effect on the local economies.

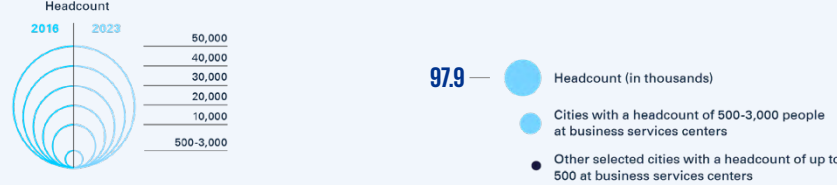
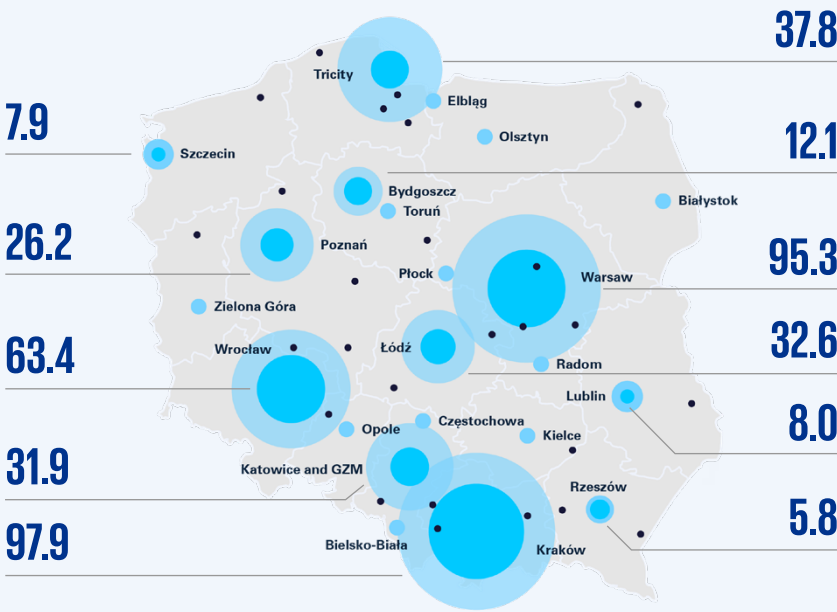
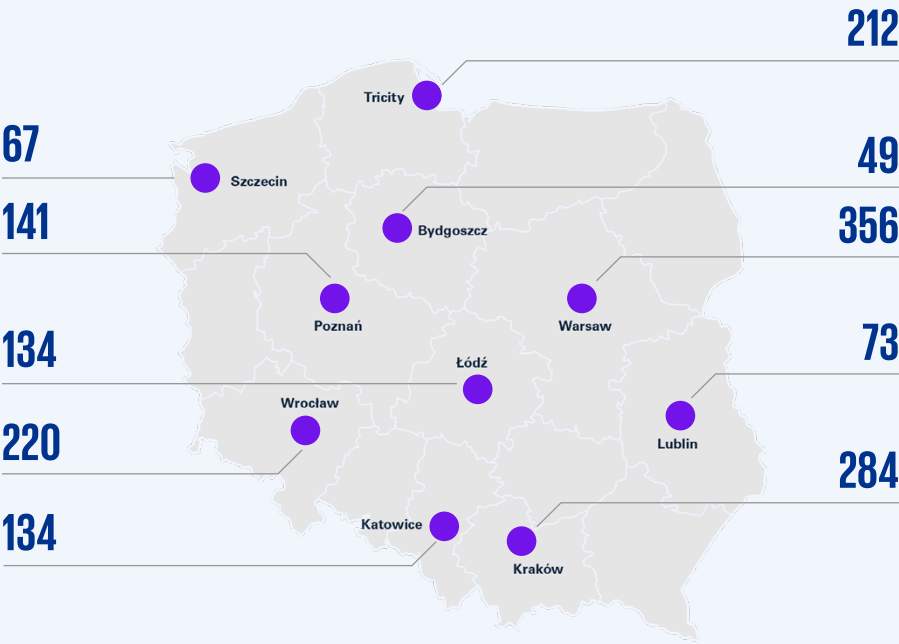
A noteworthy aspect of Poland’s business service sector growth is the supportive infrastructure. The 4,688 kilometers of motorways and expressways and the plans for their expansion facilitate the

operational needs of these centers by ensuring efficient transport and logistics. Additionally, the presence of 13 international airports and four major maritime ports enhances Poland’s connectivity not just within Europe but globally, bolstering its position as a strategic investment location.

The landscape of business service centers in Poland is a testament to the country’s dynamic approach to economic development and globalization. As Poland continues to develop and optimize its urban centers, the business services sector is expected to play an even larger role

in shaping the economic future of the country. This chapter not only highlights the current state but also sets the stage for discussing potential growth areas and the strategic initiatives needed to sustain and enhance this sector’s impact.

Number of business centres and their employees in Poland



In Q1 2023 there were 1,803 BPO, SSC / GBS, ITO & R&D business services centers in Poland. In Q1 2025 this number grew to 2,081 business services centers.

Source: ABSL report *Business Services Sector in Poland 2025*.

Image: Manufaktura – an arts center, shopping mall, and leisure complex in restored factory.



# Why Łódź?

## The Łódź region stands out as an attractive destination for new investment within Poland.

With city-led initiatives, an inventive Special Economic Zone, an advantageous geographical location and a well-developed transport infrastructure, the city is set to experience significant growth in the coming years. Łódź is already home to investors from key sectors. Over 130 service centers, 200 IT companies, and

1,800 life science entities are operating here. Modern Business Services, Advanced Manufacturing, Digital Technologies Life Sciences employ almost 200,000 people combined.

What is most important, Łódź represents a vibrant center of opportunity, ideally positioned to attract investment, foster innovation, and promote sustainable growth. The city combines a thriving business climate with a strong commitment to quality of life, making it an appealing destination for forward-looking enterprises and individuals seeking long-term success and well-being.

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# Human resources & Education

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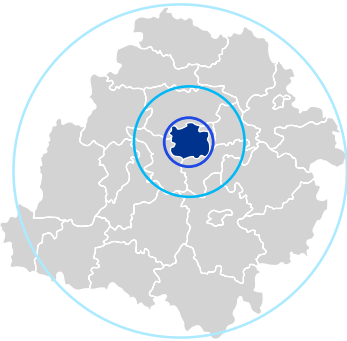
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A key element in attracting new investors is ensuring access to a local pool of skilled talent. Łódź is the fourth largest city in Poland in terms of population, with approximately 660,000 residents, following Warsaw, Krakow, and Wrocław with an additional third of that living within the agglomeration area.<sup>6</sup>

Number of occupants



660,000  
people in Łódź

850,000  
people in The Łódź Agglomeration

2,500,000  
people in The Łódź Voivodeship

Source: Promotional materials from <https://invest.lodz.pl>.

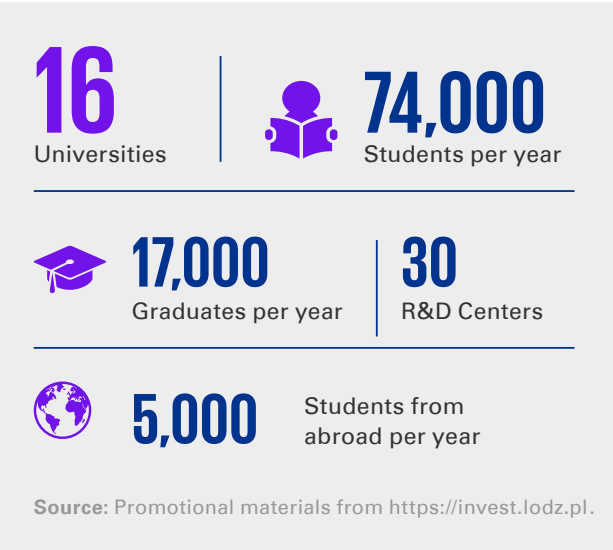
Łódź prioritises maintaining high standards of education, not only to attract people from outside the city but also to retain local talent for its workforce. Central location and infrastructure are fundamental, but today it is people who make the difference – engineers, specialists and university graduates who bring a fresh perspective and new skills to companies.

As a hub for knowledge-based industries, Łódź boasts 16 universities with over 74,000 students which means over 17,000 skilled graduates every year.<sup>7</sup> The city aims to create business conditions and development opportunities for young people through initiatives, which aim to attract new residents and prevent young talent from leaving the city. Łódź is committed to promoting new technologies and creating a favourable investment environment, particularly for the IT, manufacturing and logistics sectors.

In cooperation with local universities and employers, the City of Łódź has launched the largest program in the country, known as “Youth in Łódź”. This initiative includes various activities, such as scholarship programs and professional internships, to support young talent from an early stage. In addition, Łódź City Hall is working with educational institutions and other partners to improve the skills of the local workforce to meet the growing demand for advanced skills in modern business services. New academic programs are being introduced to complement existing ones, and the curriculum is evolving to become more practical and better prepare students for in-demand careers.

In addition to that, The University of Łódź is one of the main drivers of academic and business development in the region. It runs an Academic Business Incubator, which supports young

Number of universities and research centers in Łódź



entrepreneurs in implementing their business ideas. The University also operates a Technology Transfer Center, which facilitates the commercialization of research results and their

<sup>6</sup> [https://invest.lodz.pl/files/public/aktualnosci/2025/Lodz\\_2025\\_Industry\\_Innovation\\_Infrastructure.pdf](https://invest.lodz.pl/files/public/aktualnosci/2025/Lodz_2025_Industry_Innovation_Infrastructure.pdf).

<sup>7</sup> *Report BEAS 2025 Antal and Cushman & Wakefield*, <https://investmentpotential.pl/lodz>; <https://paih.gov.pl/wp-content/uploads/2025/02/Potencjal-inwestycyjny-polskich-miast-Lodz-2025.pdf>.

implementation in the economy. The university is involved in international research projects and cooperates with companies, offering tailored internships and consulting programs.

The Łódź University of Technology regularly introduces new specializations, often in

consultation with representatives of local companies, so that graduates are ready for the challenges of green transformation and digitization. It is a great opportunity for students to gain their first work experience during the course of studies. It is also a chance to see what potential growth zones and expectations are in certain areas.

Furthermore, the city is establishing numerous centers that bridge the gap between academia and industry, offering free co-working spaces, clusters and labs where the latest technological advances are utilized, fostering a culture of collaboration and knowledge sharing.

# University of Łódź

## Main information:

- > 23 471 Students;
- > 5 580 Graduates;
- > 12 Departments;
- > World university rankings: Emerging Europe and Central Asia, 2021;
- > American corner;
- > Technology transfer center;
- > Polish Language Centre.
- > **Business tailor-made study courses & postgraduate studies:** Linguistic for Business, Banking and Digital Finance, Business Process Automation, Fintech, AML Analyst.



Image: University of Łódź, Faculty of Philology building.

# Łódź University of Technology

## Main information:

- > 10 564 students;
- > 2 331 Graduates;
- > 9 Departments;
- > 12 Interdisciplinary institutions;
- > Technology transfer centers;
- > International Studies;
- > Research Teams;
- > Oldest Textile Faculty in Poland.
- > Close cooperation with small and large businesses
- > **Business tailor-made study courses & postgraduate studies:** Computer Science, Automation and Robot Controlling, Modelling and Data Science



Image: Łódź University of Technology.

In addition to robust academic base provided by the local universities, the city aims to promote educational and professional development among new generations of academics. One of such efforts is represented by the “Youth in Łódź” (Młodzi w Łodzi) program – a strategic initiative aimed at encouraging young people to build their future in Łódź. One of the program’s flagship components is the scholarship scheme, which provides financial support to outstanding students in Łódź. In addition to the monetary aid, participants benefit from free accommodation, language courses, and skill-building workshops. In 2024, the program awarded scholarships to over 200 students, with support from more than 280 local companies and institutions. To promote higher education in the city, the initiative includes the “Get a Taste of Studying in Łódź” project. By attending activities such as academic classes,

workshops and lectures, and engaging with faculty and current students – the students get to experience the university life firsthand. The goal is to present Łódź as a vibrant academic center where young people can not only study but also grow personally and professionally. The summer internship program further strengthens the link between education and employment. It offers paid monthly internships to university students and recent graduates at leading companies in Łódź – each year, between 200 and 400 internships are made available, with more than 80% of participants receiving job offers upon completion. This initiative plays a crucial role in building a skilled workforce and retaining talent within the city. All three initiatives highlight the cooperation happening between the city and the business in effort to incubate a competitive academic advantage from the local student pool.



The goal is to present Łódź as  
**a vibrant academic center**

where young people can not only study but also **grow personally and professionally.**

# Location & Transport infrastructure

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**Łódź stands out thanks to its excellent location in the very center of Poland, which makes it a natural transport hub for domestic and international transport routes. Its proximity to major Polish cities and European capitals (within a radius of 500 km from Berlin, Prague, Vienna, and Budapest) makes it particularly attractive to investors and the logistics industry.**

The city is surrounded by a comprehensive network of expressways. The A1 (north-south) and A2 (east-west) motorways, as well as the S8 and S14 expressways, provide efficient access to Warsaw (in just over an hour), Gdańsk, and Katowice. As a result, Łódź has become the first city in Poland to be fully surrounded by a ring road, and its location at the intersection of these routes allows for the effective servicing of domestic and international supply chains.

The developed railway infrastructure enables fast connections to the largest agglomerations in Poland. Łódź Fabryczna is a modern, multimodal transport hub used by both long-distance and local trains as well as buses. The 17 km underground cross-city tunnel currently under construction will allow for convenient transfers and improve travel through the city center, significantly improving the accessibility of urban transport.

The implementation of the Central Communication Port will place Łódź at the center of modern

transport infrastructure in Central and Eastern Europe. The city will become a major investment hub – in the business services, logistics, and high-tech manufacturing sectors. Thanks to this investment, Łódź will gain the status of one of the best-connected places for work and business in the region, enabling fast and convenient transfer of employees from abroad, as well as efficient handling of international investment contracts. Direct rail and road connections to the CPK will significantly reduce travel times between Łódź, Warsaw, and other key cities, promoting staff mobility and international business cooperation.

High-speed rail will be crucial for the future of the city. The "golden Y" project, a new line connecting Łódź with Warsaw, Poznań, Wrocław, and the Central Communication Port, will reduce travel time to Warsaw to 45 minutes and to the new CPK airport to 30 minutes. Łódź will become the central transfer point of this spoke infrastructure, strengthening its status as the most important transport hub in Central Poland.

An important element of Łódź's logistics potential is its long-standing role as a gateway connecting Europe and Asia. It is here that the main stage

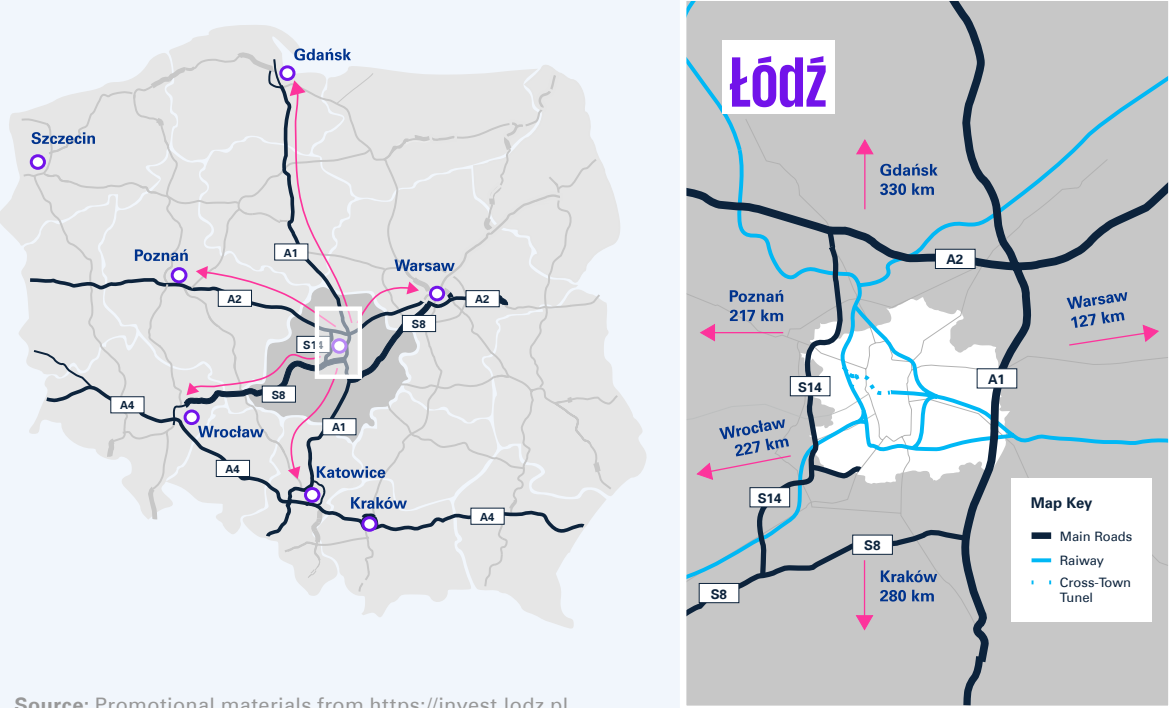


Image: The panorama of Łódź, Piotrkowska Street toward north.

of the New Silk Road ends, with direct rail connections to China (Chengdu). More than 3,300 international trains are handled annually, which translates into the rapid flow of goods from Asia to European customers in as little as several dozen hours. Major investments in urban infrastructure, such as road and tram track upgrades and new transport hubs, are systematically improving travel comfort and public transport. The dynamic development of Łódź Airport and the proximity of Warsaw Chopin International Airport provide residents and businesses with easy access to the most important airports in Europe and around the world.

In summary, Łódź is today a city with a strategic location and modern, constantly improving transport infrastructure. This factor makes it one of the most important transport hubs in Poland and Central Europe, prepared for further rapid development and growing economic integration with the region.

Transport infrastructure around Łódź



Source: Promotional materials from <https://invest.lodz.pl>.

There are over 260 million people within a 1,000 km radius of the center of Łódź, providing a huge target market for manufacturers located near the city. This large population ensures quick and easy access to end consumers, which can facilitate business development.

This area includes countries such as the Central and Eastern European (CEE) region, the Baltic States, Germany, Austria and Denmark, further increasing the market potential and enabling convenient business operations on a large scale.



Image: Tram Center Piotrkowska.

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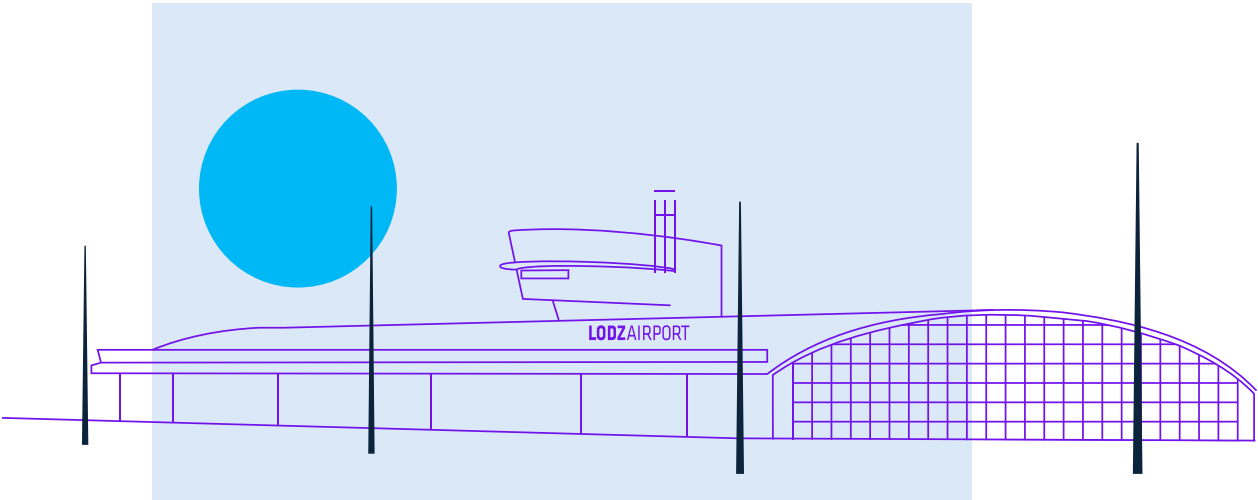
Why Łódź?

Łódź Airport Central Poland, situated six kilometers southwest of the city center, serves as an international hub for both passenger and cargo transport. In 2024, the airport recorded a 21% year-on-year growth in passenger numbers. To meet the rising demand for logistics services, it also operates a dedicated cargo terminal. The airport’s strategic importance is expected to strengthen further through a planned collaboration with partners from the MRO (Maintenance, Repair, and Overhaul) sector. This initiative includes the development of a modern aircraft maintenance complex featuring eight hangars with a total area of 40,000 sq m and a new apron covering nearly 8 hectares. The airport also provides investment-ready land for development, with 25 hectares available on the landside and 35 hectares on the airside both perfectly suited for logistics projects. Owing to its strategic location,

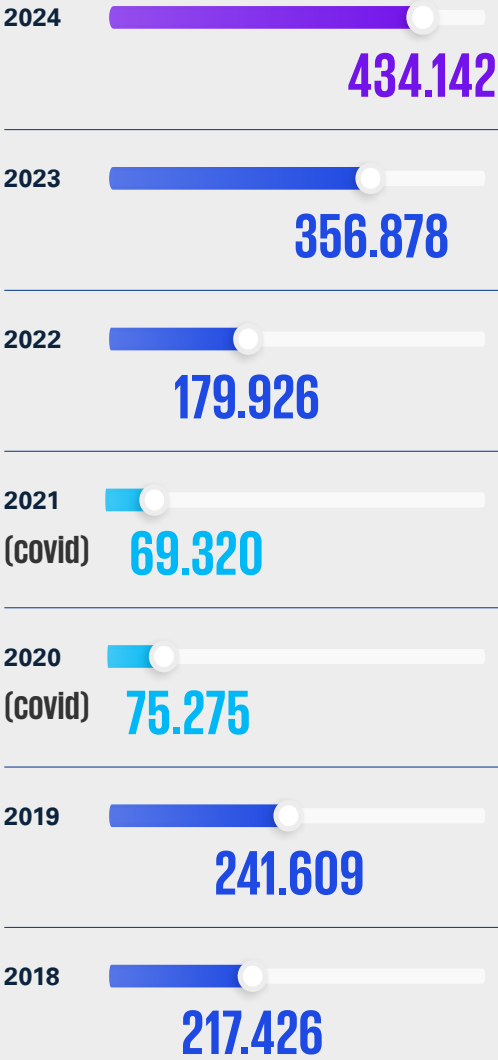
the site is particularly attractive for high-value investments such as an intermodal logistics hub or a distribution center.<sup>8</sup>

The integration of CPK with the airport infrastructure in Łódź will open up prospects for the city to develop as a central transfer point in Europe, where both international employees and business travelers will have easy access to modern, multimodal transport solutions. The synergy will result not only in the rapid and convenient relocation of talent, but also in an increase in the number of jobs and new investments in the transport, service, and logistics industries.

<sup>8</sup> [https://invest.lodz.pl/files/public/aktualnosci/2025/Lodz\\_2025\\_Industry\\_\\_Innovation\\_\\_Infrastructure.pdf](https://invest.lodz.pl/files/public/aktualnosci/2025/Lodz_2025_Industry__Innovation__Infrastructure.pdf); <https://lodz-airport.pl/en/373/over-431000-passengers-in-2024>.



Number of passengers in Łódź Airport



Source: <https://lodz-airport.pl/en/373/over-431000-passengers-in-2024>

# Investment attractiveness

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**Łódź perceived mainly as a city of textile industry, is now becoming a symbol of a modern economy based on knowledge, cooperation and responsible development. The city offers over 35,000 skilled professionals and is home to top business and technology universities. It remains scalable while maintaining a strong cost advantage, supported by a multilingual workforce.**

Łódź hosts more than 120 business services centres and has over 20 years of experience in the BSS sector. It also benefits from excellent university-business cooperation and the presence of global GBS leaders.

The vibrant entrepreneurial ecosystem and numerous incentives offered by the local authorities further enhance its attractiveness as a business destination. In addition, Łódź ongoing urban development projects and investment in infrastructure further strengthen its position as a prime location for business growth and innovation.

The ongoing urban revitalisation of Łódź, combined with its expanding cultural scene and relatively low cost of living, has positioned the city as an increasingly attractive destination for

creative professionals, supporting the growth of the ICT sector and innovative start-ups. Collaboration between academia and business through technology parks, clusters, and university research centers further stimulates innovation. As a result, Łódź once overshadowed by larger Polish cities is now recognised as a rising star on the national investment map, drawing prestigious, globally oriented projects.

Łódź is recognized in various rankings in terms of investment and business attractiveness. With its strategic location, skilled workforce and



Image: Monopolis – office & retail complex, p.c. Żydowicz.

## Selected 2023, 2024, 2025 Awards

### ABSL

- Cooperation with local universities **1st (2023, 2024, 2025)**
- Cost of renting office space **1st**
- Cooperation with a local investor support unit **1st (2023), 2nd (2024, 2025)**
- Level of wages **1st**
- Availability of modern office space; Availability of flex / coworking office space **1st (2025)**

### Emerging Europe

- CEE's Most Business-Friendly City **4th**
- Business Climate **2nd**
- Talent Pool **3rd**

The study covered 100 cities in Europe and beyond

### European Cities and Regions of the Future

- Top 10 Mid-Sized European Cities Of The Future 2023 Business Friendliness **2nd**

Source: Promotional materials from <https://invest.lodz.pl>.

supportive business environment, the city has become a hub for both domestic and international investors.

In the European Cities and Regions of the Future 2025 ranking prepared by fDi Intelligence. In the Business Friendliness category, the city ranked 2nd among medium-sized European cities.

Łódź was also recognised in the PRO Tiger competition in the "Location" category, which identifies cities and agglomerations that offer the most attractive conditions for business and investors. The competition assessed the availability of talent, labor costs, developed office infrastructure, logistics potential, as well as social initiatives and quality of life.



Image: Piotrkowska Street, p.c. Łacheta.

**1st place**

**The Best Local Government category**  
with over 100,000 inhabitants

**In category of Best Mayor of a Municipality**  
with over 100,000 inhabitants

**The most efficient city in terms of administrative activities**  
in 2021

**In the City of the Year category**  
(12th Europa Property Investments & Manufacturing Awards)

**Awarded by ABSL for cooperation with local universities and for transport availability**

Source: Promotional materials from <https://invest.lodz.pl>.

# Special Economic Zone

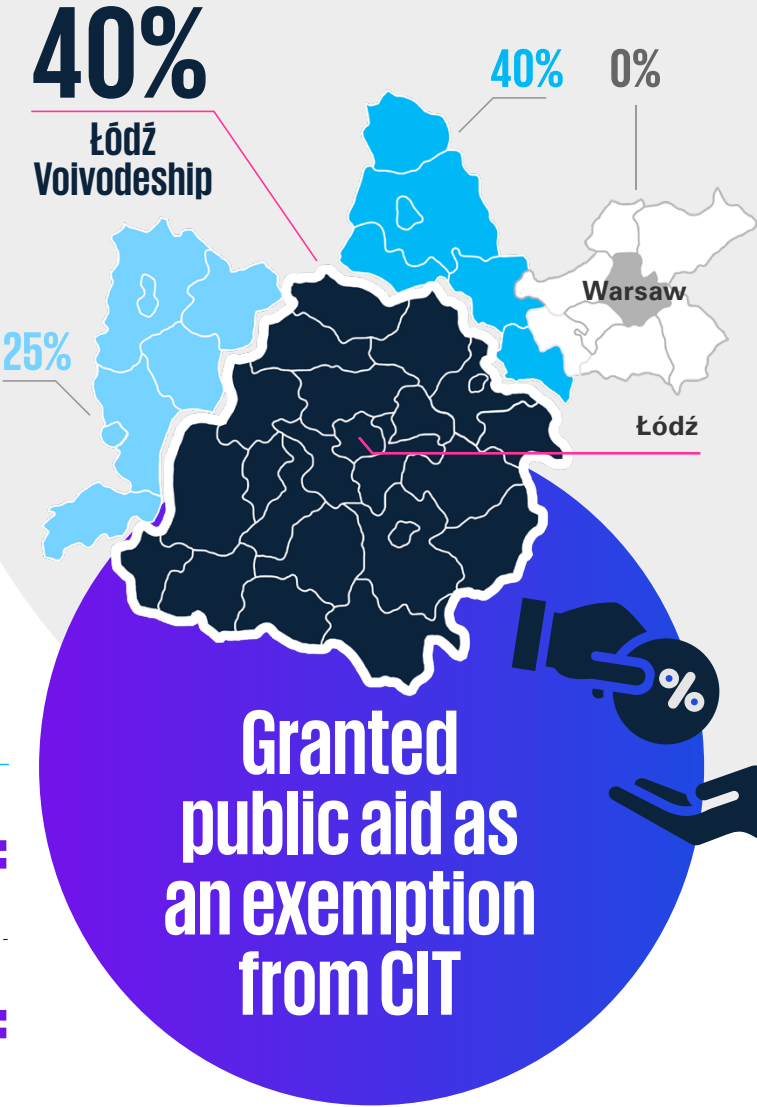
The Łódź Special Economic Zone (ŁSEZ) covers the Łódź Voivodeship, part of the Mazowieckie Voivodeship and the eastern region of the Wielkopolskie Voivodeship.

The central location, combined with the extensive road and rail infrastructure, gives the ŁSEZ the potential to attract investors by supporting the development of new technologies. The ŁSEZ ranked 10th in the Free Zones of the year 2022 ranked by FDI's, which confirms the region attractiveness for new investments.

The Łódź Special Economic Zone (ŁSEZ) presents a compelling array of incentives and opportunities for businesses looking to establish or expand their presence in Poland. With tax exemptions

reaching nearly 70%, the ŁSEZ offers an attractive proposition for investments in both the manufacturing industry and business services sector. Moreover, the zone provides a diverse selection of investment areas, real estate options, and manufacturing parks, accompanied by robust support for new ventures. With its comprehensive range of offerings and forward-thinking approach, the Łódź Special Economic Zone emerges as a prime destination for businesses seeking growth and innovation opportunities in Poland.

Public aid map for 2022–2027



## Tax exemption from "CIT" <sup>(1)</sup>



**Services**  
(IT, BPO, SSC and others)

40%<sup>(2)</sup>



2<sup>(3)</sup>



X<sup>(4)</sup>

=



**Manufacturing**

40%



cost of land acquisition,  
cost of acquisition, expansion or  
modernization of fixed assets  
(e.g. machinery) cost of acquisition  
of intangible assets

=

<sup>(1)</sup> Simplified schemes. More information on: <https://sse.lodz.pl/en>; <sup>(2)</sup> Support level in Łódź; <sup>(3)</sup> Two-years employment cost of an employee; <sup>(4)</sup> Number of newly hired employees. **Source:** Promotional materials from <https://invest.lodz.pl>.

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Support form the Łódź Special Economic Zone

Incentives for moderns services for business (BPO/SSC/GBS/IT)

|                            | What and when                                                                                                                                                                                                                                                                                                                                                          | How-Key Conditions                                                                                                                                                                                                                                                                                                                                                                                                                   | Savings                                                                                                                                                                                   |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Training Vouchers          | <ul style="list-style-type: none"><li>Aim: Upskilling of employees</li><li>Trainings/post graduatestudies from BUR data base<br/><a href="https://uslugirozwojowe.parp.gov.pl">https://uslugirozwojowe.parp.gov.pl</a></li><li>Recruitment rounds<br/><a href="https://startupspark.sse.lodz.pl">https://startupspark.sse.lodz.pl</a></li></ul> <b>Years 2025–2027</b> | <ul style="list-style-type: none"><li>Registration in PARP database</li><li>Participation in the recruitment round for vouchers</li><li>Training providers to be selected from PARP database</li></ul>                                                                                                                                                                                                                               | <ul style="list-style-type: none"><li>c.a. 10kPLN year/person</li><li>(c.a. 2.3k EUR including 15–50% own contribution)</li><li>up to 100000PLN per company</li></ul>                     |
| Income Tax (CIT) Exemption | <ul style="list-style-type: none"><li>Aim: public aid for new investors</li><li>Income tax <b>(CIT) exemption</b> from income derived from a new investment/re-investment for a period of <b>14 years</b><br/><a href="https://sse.lodz.pl">https://sse.lodz.pl</a></li></ul> <b>Years: no limit</b>                                                                   | <ul style="list-style-type: none"><li>The approvalof the project must be done before the investment or expansion begins.</li><li>Official request (application) for the public aid is required</li><li>Employment must be maintained for min. 3–5 years.</li><li>The quantitative criterion for BPO/SSC/IT amounts to 2 m PLN (re-investment)/4 m PLN (new investment).</li><li>The investor must meet 5 quality criteria.</li></ul> | <ul style="list-style-type: none"><li>CIT Tax exemption amounting to of 40–60% of qualified labour costs</li><li>Administration fee up to 3.55% of total declared labour costs.</li></ul> |

Source: Promotional materials from <https://invest.lodz.pl>.

Łódź is committed to developing entrepreneurship through close cooperation between business and public administration, offering various forms of support for entrepreneurs, including tax relief, subsidies and access to preferential premises. The city offers comprehensive assistance at every stage of the investment process – from location consulting and tax relief to administrative support. Organization responsible for building long-term partnerships and ensuring that every investor receives comprehensive, professional assistance tailored to their needs is Invest in Łódź – a municipal investment support team established by the City of Łódź. They cover all key aspects of the investment cycle, from market entry to business expansion. Invest in Łódź provides in-depth market insights and customized economic data to support informed decision-making. The team helps investors identify optimal locations and suitable real estate options, while also guiding them through local legal and administrative procedures. In addition, the team offers advisory services on available investment incentives, tax reliefs, and opportunities that enhance the competitiveness of projects implemented in Łódź. By connecting investors with local business

The city offers comprehensive assistance at every stage of the investment process



Site selection



Pre-investment research



Recruitment employer branding



Post-Investment support

Key info about public aid

Key requirements to be fulfilled

- Minimum Investment Level** (quantitative criterion): 4 m PLN new investment/ 2 m PLN reinvestment
- Job Creation Requirement:** Job positions must be maintained for at least **3–5 years**
- Declared qualitative criteria must be fulfilled for the periods of **3–5 years**
- Łódź Special Economic Zone Fee: up to 3.55% of total eligible costs (paid in monthly instalments)

Source: Promotional materials from <https://invest.lodz.pl>.

- The right to the public aid (the decision of support) must be obtained **before** business is establishment (the incentive effect)
- Eligible labour costs:** 2 year total employer costs, including salaries, social security contributions and other related expenses of new employees (employed after the approval)
- Amount of Public Aid:** 40–60% of eligible labour costs to be used as an exemption from CIT (Corporate Income Tax)
- Duration of Support:** 14 years
- Approval Time:** Decision on public support within **max. 30 days** (from submission of a complete application)

partners, universities, and skilled professionals, Invest in Łódź helps companies integrate quickly into the local ecosystem and maximize their growth potential within the region.

People planning to start a business can apply for one-off start-up funds, available at District Employment Offices and institutions offering EU support. Currently, the maximum amount is approximately PLN 24,000<sup>9</sup>. In addition, the city implements programs supporting innovation and technological development, offering tax breaks and access to preferential premises for entrepreneurs investing in new technologies.

<sup>9</sup> Report BEAS 2025 Antal and Cushman & Wakefield, <https://investmentpotential.pl/lodz>.

Thanks to these initiatives, in 2025 Łódź is strengthening its position as a business-friendly city, offering comprehensive support for business development. On top of that, Invest in Łódź is the creator of the program supporting these young organizations. They serve as a platform for building business relationships between startups, venture capital funds, and other potential partners. Their primary goal is to facilitate access to capital, provide comprehensive support and knowledge for start-ups which helps them scale their operations and bring innovative solutions to the market. The program also enables the implementation of innovative projects directly in municipal companies. An example of a Łódź-based startup that has achieved great success thanks to its participation in the program is When U Buy – a platform that simplifies e-commerce purchase

Calculation of public aid – case study

**Modern Services for Business** (BPO/SSC/IT)  
Business location

**Industry:** Cosmetic production, **SSC scope:** Accounting & Bookkeeping Services (Financial Audit), **IT Key Facts**  
**Headcount:** 165FTE, **Investor Origin:** United States

$$\text{USD } 15 \text{ m investment} \times 40\% \text{ level of public aid} = \text{USD } 6 \text{ m}$$
  
total amount of eligible aid (exemption from CIT)

- Incentive effect:** the right to the public aid must be secured before the contract for renting the office space
- Eligible costs:** 2 year labour costs of newly hired employers, which include gross remuneration cost plus obligatory payments
- Duration of Support:** 12 years, starting from 2021
- Decision Time:** Decision on public support within **max. 30 days**
- Job Creation Requirement:** Job positions must be maintained for at least **5 years**
- LSEZ Fee 2.2%–330k USD (in total, paid in 144 monthly instalments)

- Key requirements to be fulfilled**
- Creation of highly paid work places
  - Childcare support
  - Programmes of competence development or cooperation with schools
  - Additional benefits for employees investment in priority/key sectors

Source: Promotional materials from <https://invest.lodz.pl>.

Why Łódź?

management by consolidating processes across multiple platforms. After participating in the accelerator, it strengthened its market position and gained strategic investors.

Łódź offers over 300 hectares of investment land within its administrative borders, which stands out as one of its unique advantages. The region has strong warehouse and production facilities – it is the third largest market in Poland with over 4.5 million m<sup>2</sup> of modern warehouses and other attractive investment areas<sup>10</sup>.

<sup>10</sup> <https://nowoczesny-przemysl.pl/lodz-stawia-na-przemysl-przyszlosci>.

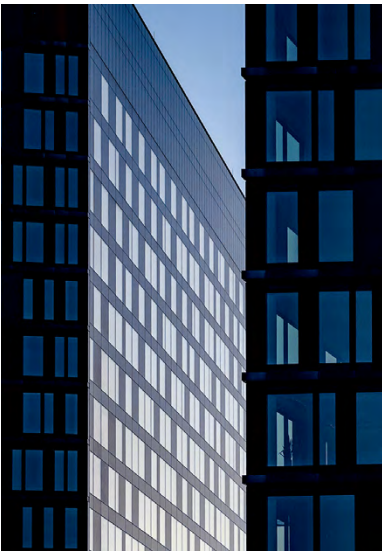


Image: Łódź City Gate.

1. Investment planning

Tax-exemption

The ŁSEZ offers a tax exemption for new investments and redevelopments. The program is aimed at the manufacturing industry and Business Services and gives the possibility to reduce tax by almost 70%.

Investment areas

The ŁSEZ has a wide offer of investment areas, real estate and manufacturing parks. Within the zone, new investors can get support with opening new businesses and production.

Partners' Zone

The ŁSEZ helps to create a wide network of contacts with other investors and manufacturers. With the help of the Partner Zone program, it is easier to access help from experts in many areas of business.

2. Technology and innovation

Accelerating programs

The ŁSEZ supports start-ups and small businesses. Sharing experience, infrastructure and sources, helps new businesses to be established in Poland. ŁSEZ has supported more than 200 startups, so far.

Rethink Digital HUB

Helps companies with digital transformation by offering experts' insights, additional courses and Test Before Invest services.

Re\_connect

The ŁSEZ is the only Economic Zone in Poland that offers **metaverse** technology and helps to implement it in businesses by offering many courses and knowledge sharing.

3. Business development

Re\_Open\_UK

Helps to reduce the negative impact of Brexit on the Polish economy and businesses.

Technical School of Automation and Robotics TAiR

One of the most innovative technical schools in Poland. Established by ŁSEZ and its partners, gives the possibility to qualify the future workforce with additional practical experience.

# Unveiling economic potential

## Exploring Łódź economic sectors



in the technology and business services sectors. Among the most significant and valuable projects in terms of innovation and the size and quality of employment opportunities are initiatives such as Wella Company (Centre of Excellence, Germany), Vention (IT, USA), InfoPulse (IT, Ukraine), EY (Centre of Excellence), Barry Callebaut (BPO, USA), First Derivative (Ireland) and DataArt (USA), Takeda (Japan), Philips (Netherlands), Infosys (India), McCormick (USA), Rossman (Germany).

### Business Services

Łódź is developing dynamically in the field of modern technologies, which is evidenced by the presence of 130 BPO/SSC companies and over 200 IT companies employing a total of 35,000 specialists.<sup>11</sup> The city offers many job opportunities for experts in various fields, especially those related to high technologies. Investors have recognised the city's development and are increasingly choosing Łódź as a location for both new projects and the expansion of existing businesses. As a result, the city is increasingly attracting attention as an investment destination



### Digital Technologies

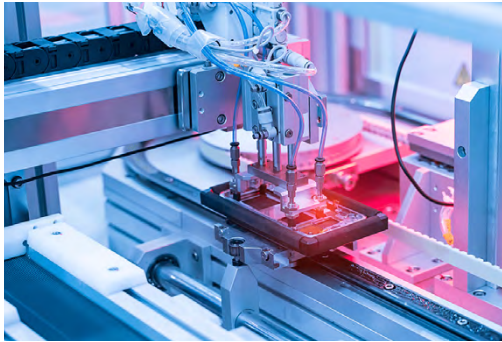
The city has a strong presence of providers of advanced technologies for both banks and other financial institutions, including insurers, leasing companies and FinTechs. In the 2023 edition of the Polish FinTech Map by the Cashless portal, Łódź is



**Łódź maintains one of the lowest labor attrition rates in Poland, supported by a stable employment environment. The city's unemployment rate of 4,8% as of February 2025 is significantly lower than the national average of 5.8%, highlighting its ability to retain talent and sustain employment across sectors. This stability is further supported by a consistent rise in wages – average gross salaries in Łódź reached PLN 8,126.23 in early 2025, marking a 7.1% year-on-year increase.**

ranked third, just behind Warsaw and Poznań. Łódź is home to 6% of FinTechs operating in Poland. Thanks to the cooperation between FinTech Central Poland, the University of Łódź, Invest in Łódź (Central Poland) and other companies and institutions, the first edition of postgraduate FinTech studies was launched in October 2024. In Łódź, a diverse range of companies and startups from the sector operate, including ArtShare, MakoLab, and BinarApps.

<sup>11</sup> Report BEAS 2025 Antal and Cushman & Wakefield, <https://investmentpotential.pl/lodz>.



## Advanced Manufacturing

The manufacturing sector in Łódź, Poland, is a major driver of the local economy and plays a crucial role in the city's industrial landscape. Historically known as one of the major textile production centres in Europe, Łódź has diversified its manufacturing base over the years and is now home to a wide range of industries. These include automotive, engineering, electronics, plastics, chemicals and food processing. One of the key strengths of the manufacturing sector in Łódź is its skilled workforce, supported by several technical universities and vocational schools in the region. This provides a steady stream of qualified personnel for the various manufacturing industries operating in the city. Well-known brands such as ABB, B/S/H/, Miele, Daikin (Japan).

The distribution and logistics sector in Łódź is an important part of the city's economy and is characterized by a wide range of companies, including transportation companies, warehouses, freight forwarders and logistics service providers.

As one of the largest cities in Poland, Łódź serves as a major logistics hub due to its strategic location at the crossroads of the country's main transport routes. The city's central location within Poland makes it an ideal distribution center for both domestic and international markets. Łódź is well connected to major Polish cities, facilitating the efficient movement of goods throughout the country. In addition, Łódź's proximity to major European markets provides easy access to key trading partners, making it an attractive location for companies engaged in cross-border trade. There are three intermodal terminals located in the city and on its outskirts, handling a total of around 170,000 TEUs per year. An additional intermodal terminal is under construction and is expected to handle approximately 120,000 TEUs by 2026.



## Life Sciences

The region has significant research and development capabilities focused on biological, medical and chemical sciences, as well as medical institutions such as the Medical University, the

Polish Maternal Health Institute, the Institute of Occupational Medicine and the Łódź Regional Science and Technology Park. This park is dedicated to research into new types of cosmetics and nanomaterials. Within these centres, numerous research and development initiatives are underway, providing a solid foundation for the development of the biotechnology and nanotechnology sectors in the region. According to the latest available statistics, there are approximately 8,000 specialists working in biotechnology and pharmaceuticals in Łódź. In the past two years, several new laboratories have been opened in Łódź, including MolEcoLab, Brain, the Clinical Research Support Centre and the Bacteriophage Biotechnology Centre of Proteon Pharmaceuticals with Adamed, Aflofarm and Mabion being the .key players in the sector.



Image: EC1 City of Culture – post-industrial former first commercial power plant complex converted into a cultural center.

# Real Estate market

## Office market

Łódź is the sixth-largest regional office market in Poland, accounting for around 5% of the country's total office stock, making it a key destination for both domestic and international businesses seeking regional office space. By Q1 2025, **the total office supply in Łódź reached approximately 642,000 sq m<sup>12</sup>**, reflecting steady growth driven by increasing demand from the business services and technology sectors. The city offers a diverse mix of A- and B-class office spaces, complemented by a distinctive portfolio of modern offices located within revitalised post-industrial buildings. This unique approach to office development not only preserves Łódź's cultural heritage but also provides a creative and inspiring work environment, setting the city apart from other Polish business hubs. Notable examples of such developments include Monopolis, Fuzja, Textorial Park, OFF Piotrkowska, and the WIMA complex, each featuring large parks and green areas combined with modern interiors that maintain the character of the original industrial architecture.

Currently, there are over 100,000 sq m available for rent with additional 13,000 sq m in development and expected to be delivered in 2027. These new



Image: Łódź City Centre.

additions are expected to strengthen Łódź position as a competitive regional office market. Asking rents for modern offices remain relatively low and attractive when compared to other regional cities, ranging from EUR 9.00 to EUR 15.00 per sq m per month<sup>13</sup>, offering cost-efficient alternatives for companies seeking high-quality office space without the premium of larger urban centers.

A distinctive aspect of Łódź's office market is the concentration of the majority of modern buildings within the city center, creating a vibrant business district with easy access to transport, amenities, and cultural venues. In contrast, office properties in other regional markets tend to be more widely dispersed, often lacking a centralised business environment. The city continues to offer a broad range of lease opportunities, with investments

### Office Space Availability in Łódź

**642,000 sq m**  
Total Stock

**143,000 sq m**  
Space Available

**17,000 sq m**  
In Development

**EUR 9.00–15.00**  
Price sq m

Source: Ibidem.

<sup>12</sup> [mktgdocs.cbre.com/2299/cfac7c16-1aee-45b2-ab2d-ea10d9510b73/1944211544/\\_\\_\\_d\\_\\_\\_2025\\_Q1\\_Office\\_Figures.pdf](https://mktgdocs.cbre.com/2299/cfac7c16-1aee-45b2-ab2d-ea10d9510b73/1944211544/___d___2025_Q1_Office_Figures.pdf).

<sup>13</sup> [content.knightfrank.com/research/2297/documents/en/lodz-city-attractiveness-and-office-market-q1-2025-12204.pdf](https://content.knightfrank.com/research/2297/documents/en/lodz-city-attractiveness-and-office-market-q1-2025-12204.pdf).

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worth over EUR 33 Million expecting to roll out in 2026 providing flexibility for both small and large enterprises. Additionally, Łódź is emerging as a hub for flexible workspace solutions, attracting numerous co-working operators such as City Space, CoSpot, Loftmill, Business Link, and New Work,

catering to start-ups, freelancers, and established businesses seeking adaptive office solutions in a dynamic urban environment. This combination of traditional, modern, and flexible office spaces highlights Łódź growing appeal as a versatile and forward-looking business center in Poland.

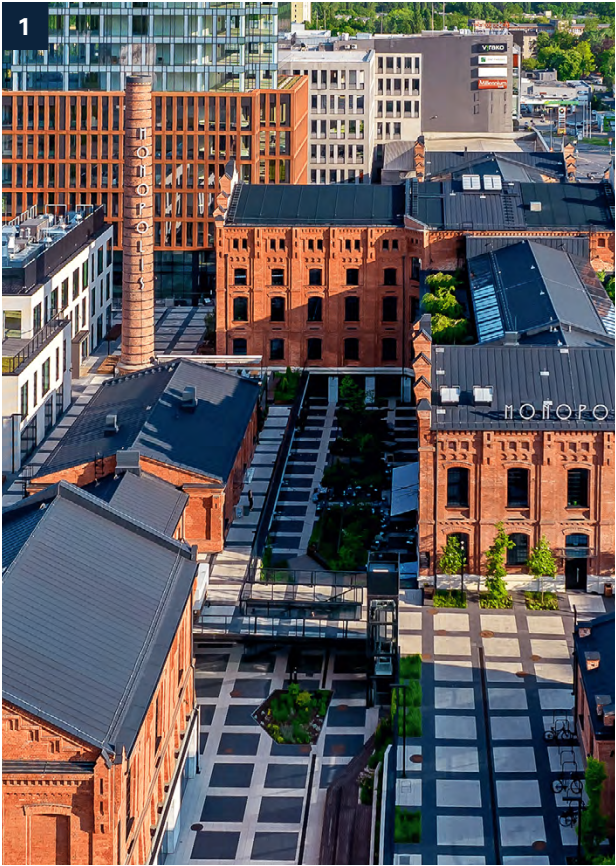


Image 1: Monopolis – office & retail complex; Image 2: Łódź City Gate, p.c Łacheta.

# Quality of Life

The city offers an increasingly higher quality of life by attracting new investors, creating greater career development opportunities and providing an interesting space to enjoy leisure time.

Over recent years, the city has experienced a profound transformation with the ultimate aim of crafting an environment that is welcoming not just to tourists but primarily to its residents. Thanks to various initiatives, Łódź is becoming increasingly appealing each year. Projects like the New Centre of Łódź are reshaping the city center into a vibrant hub for both residents and businesses, characterized by exciting attractions and innovative architecture. Moreover, leveraging Łódź’s post-industrial heritage and distinctive historical structures, old factories are being repurposed into places full of life. These improvements in public spaces are altering how the city is viewed, as evidenced by numerous prestigious awards.



**Image 1:** Piotrkowska Street, p.c. Zieliński.  
**Image 2:** Kosciuszko monument at Plac Wolności (Freedom Square), p.c. Żydowicz.  
**Image 3:** Księży Młyn (Priest's Mill) complex, p.c. Jastrzębski.  
**Image 4:** Doda's concert during Łódź Summer Festival 2025, p.c. Zieliński.

## Information notes about Łódź

4<sup>th</sup>  
place

in Pearls of the Local Government Ranking 2024  
performed by Dziennik Gazeta Prawna. Łódź announced  
as the leader in best practices in the digitization category

4<sup>th</sup>  
place

in the "Smart City"  
Ranking in 2022

2<sup>nd</sup>  
place

in Forbes  
"People-Friendly  
Cities" Ranking 2021

Source: Promotional materials from <https://invest.lodz.pl>.

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Known as the Polish center of street art, Łódź is increasingly attracting foreign artists to its growing number of murals, revitalizing its aging structures and old tenements with artistic flair.



The transformation of neglected post-industrial sites, often in the city center and with historic factory buildings, sets Łódź apart from other Polish cities. In Łódź, developers continue to undertake remarkable projects that stand out for their unique ambience and architectural intrigue; these revitalizations have resulted in distinctive places that showcase innovative architectural designs.



The city is home to unique interactive exhibitions and museums, often housed in beautifully restored historic buildings that retain their original architecture.



Łódź is continuously working to improve. The quality of life of citizens, by providing various digital solutions which make many facilities more accessible to residents and tourists visiting the city.

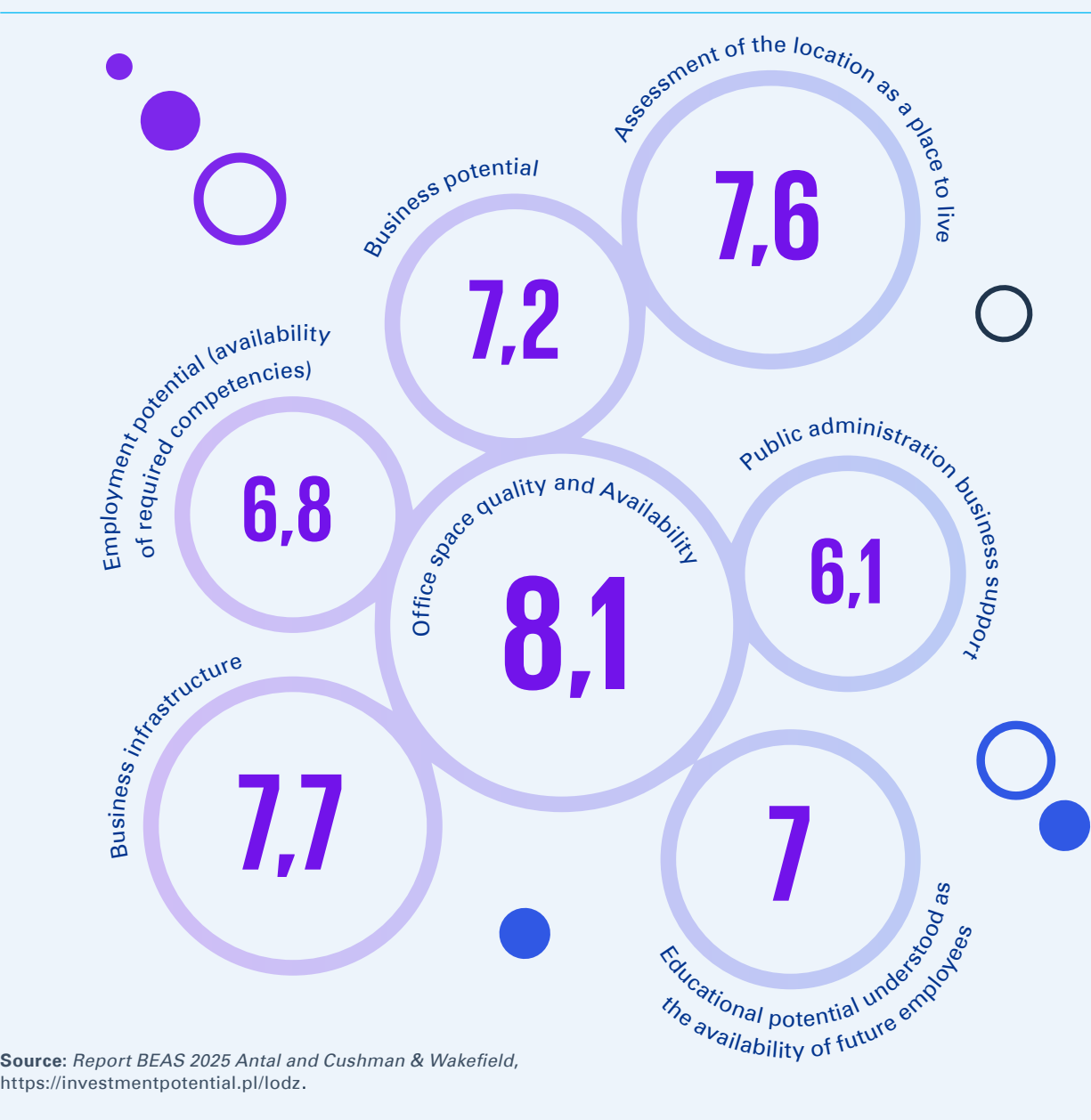


Recognised worldwide, Łódź is part of the UNESCO network of Cities of Creativity and holds the prestigious title of UNESCO City of Film. As the heart of Polish cinematography, Łódź has fostered generations of filmmakers and actors, and its cultural life is enriched by popular festivals of film, theatre, music, art and literature, many of which enjoy international acclaim and a distinctive character.

**Image 1:** Fuzja – a multipurpose post-industrial complex. **Image 2:** The Izrael Poznański Palace. Currently houses the Museum of the City of Łódź. **Image 3:** The Łódź ZOO Orientarium from above, p.c. Łacheta. **Image 4:** Audioriver Festival 2024, p.c. Zieliński.

In a 2025 Business Environment Assessment Study conducted by Antal and Cushman & Wakefield presents a comprehensive assessment of the conditions for business operations in the largest Polish cities. On average, Łódź ranks as the fourth most business-friendly city in the country with a score of 7.2, just behind Warsaw and Kraków (both 7.5) and Wrocław (7.3). Łódź stands out in several key areas compared to other major agglomerations. In Public Administration Support, the city takes a spot on the podium with a score of 6.1, alongside Katowice (6.2) and Lublin (6.4). In terms of office space quality, Łódź once again ranks in the top three, together with Warsaw and Wrocław, with only a marginal difference in points. In the employment potential category, Łódź places just outside the top three, achieving 6.8 points compared to Trójmiasto (7.2), with Warsaw and Kraków leading the ranking at 7.4. Finally, in the Place to Live category, Łódź secures a top-four position, following Kraków, Wrocław, and Trójmiasto, notably outperforming its duopolis counterpart, Warsaw.

Assessment of Łódź’s potential based on the Business Environment Assessment Study (BEAS) 2025.



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Image: Mirror sculpture of a heart named after the Great Orchestra of Christmas Charity Foundation, p.c. Łacheta.

# Sustainable city

The Łódź development strategy is founded on the principles of sustainable growth. The city is actively engaged in a variety of social initiatives, educational programmes and events that enhance ecological consciousness and promote environmental care.

These efforts, together with projects that increase the city's green spaces, are involved in creating Łódź's reputation as an eco-friendly metropolis. Nearly one-fifth of Łódź is adorned with greenery, encompassing more than 30 city parks, of which 11 are historic. Furthermore, the city has ambitious plans for the future, including hosting the Horticultural EXPO in 2029.

Łódź is actively enhancing its eco-friendly initiatives. The city's primary goal is to cultivate a reputation as a green urban area, focusing on both the improvement of urban greenery within its borders and on broader environmental and sustainable development aspects.

The City of Łódź is involved in numerous international initiatives and projects that made an impact on the environment, such as:

- EU mission: climate neutral and smart cities;
- CrAft cities: project that aims to make cities climate neutral, beautiful and inclusive;
- ICLEI: a network of over 2500 local and regional governments committed to sustainable urban development;

Łódź is highly ranked in several ecological rankings:

3<sup>rd</sup> place

Green Cities

Europolis Ranking

5<sup>th</sup> place

Green Cities

Forbes 2021 Ranking

**National Geographic** – Best of The World 2022 distinction among 25 cities in the sustainable development category

Recognition for innovative **Green Bond** issuance in the category of big cities in the **Innovative Local Government** contest by PAP Local Government Service

**EU Mission Label** awarded by European Commission

Source: Promotional materials from <https://invest.lodz.pl>.

- Blue Green Infrastructure: an urban concept assuming the creation of a network of interconnected green areas, primarily along river valleys;
- Sponge City concept: retains excess of storm water, then filters and releases the water slowly (WOSP Square, Dabrowski Square as examples of adding more greenery to the current concrete structure).



Image: View of the Central Textile Museum called "White Factory"

## Selected ECO-Projects

### EU missions

Łódź understands the importance of the climate change issue and the challenges for improving the environment. The city's government is engaged in environmental protection activities at both the national and international levels. Łódź has been chosen to take part in a program EU missions: climate-neutral & smart cities that is one of the strategic initiative implemented by the European Commission. The program aims to create more than 100 climate-neutral and smart cities by 2030 and ensure that cities act as experimentation and innovation hubs to promote climate-neutral cities by 2050. Łódź is benefiting from the program in various ways:

- Access to tailor-made advice and assistance;
- Funding and financing opportunities;
- Research and innovation funding opportunities (total EU budget for chosen cities is EUR 360m for years 2021–2023);
- Coordination network;

- Learning and exchanging experiences;
- Involving citizens in decision-making;
- Appelling sustainable business environment for investors and manufacturers.

In addition to participating in the EU Mission for Climate-Neutral and Smart Cities, the city is also engaged in the EU Mission on Adaptation to Climate Change. The objective of the mission is to enhance resilience and adaptation efforts to ensure effective response to climate change.

### FRONTH1P

Łódź also participated in the FRONTH1P (a FRONTrunner approach to systemic circular, holistic & inclusive solutions for a new paradigm of territorial circular economy) project, financed from the EU funds (European Horizon 2020).

The solutions developed within the project will contribute to decarbonizing production and consumption systems, improving quality of life, enhancing interaction between urban and rural regions, and ultimately leading to economic growth. The proposed model will be implemented

and demonstrated in the Łódź Voivodeship. It is expected that as a result of the project, CO<sub>2</sub> emissions in the region could decrease by 2–3%.

### ECO MAPPING

The implementation of eco mapping is integral to Łódź's climate package, forming a cornerstone of the city's transition towards sustainability. The eco mapping initiative serves as a strategic tool, enabling the identification and prioritization of environmental challenges and opportunities within the city. Complementary to this approach is the development of an economic model of transition, aligning economic activities with ecological goals. This roadmap not only aims to mitigate environmental impact but also seeks to capitalize on emerging green sectors, fostering innovation and economic growth.

### ECO PACT

The EKO Pact initiative, a collaborative programme between the municipality and businesses, is designed to promote environmental conservation. The programme's key elements are fully consistent with the objectives of the European Green Deal. Through this collaboration, the city receives support in implementing eco-friendly solutions, while businesses are offered extensive assistance in transitioning towards more sustainable practices.

The programme's key objectives are to:

- develop and protect green areas;
- protect and improve air quality;
- manage water resources;
- improve the efficiency of waste management;
- foster new attitudes, including educating children.

# Future of Łódź

The directions of the city’s development are determined by the **Łódź Development Strategy 2030+**, which defines the activities of Łódź in the spatial, economic and social dimensions.

The urban development strategy is focused on eco-friendly growth and enhancing the city’s resilience. This strategy document places a strong emphasis on fostering a “greener city”, promoting a sustainable economy, and developing robust infrastructure and transportation. It also focuses on creating opportunities for increased civic engagement and the development of human capital. A key aspect of Łódź’s revised development strategy is to engage its residents in shaping a welcoming and inclusive city, for instance, by involving them actively in the change design process.

## Key Strategic Goals for Łódź:

### ŁÓDŹ STRONG AND RESILIENT

Achieving resilience is essential, ensuring that Łódź’s management systems in social, economic, and spatial domains can withstand both external and internal pressures, and maintaining all infrastructures, including social facilities, in optimal condition.

### ŁÓDŹ ECONOMIC AND SOCIAL DEVELOPMENT

Enhancing the economic and social frameworks of Łódź is vital for ensuring the prosperity of its current and future residents. Decisions made now are investments in a better quality of life, improved spaces, and a robust economic environment for generations to come.

### ŁÓDŹ RESPONDING TO STAKEHOLDER EXPECTATIONS

Adapting to the needs and expectations of those who live, work, and execute their projects in Łódź is increasingly important. The city aims to provide an environment that supports optimal functionality and community well-being.

### ŁÓDŹ INSPIRING

Łódź is actively seeking innovative ideas to boost its appeal, not just to residents but also to visitors. The new development strategy includes leveraging input from its citizens to generate fresh concepts and eco-friendly initiatives.



Image: Łódź Fabryczna railway station

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Image: Interior of the renovated Łódź Fabryczna railway station.

# Survey for business services leaders in Łódź (SSC/GBS/BPM)

This chapter presents the findings of a business survey conducted among 30 Business Services Leaders in Łódź.

The survey aims to capture insights into the local GBS landscape and assess the direction of the sector development.

# Section 1: Organization Profile

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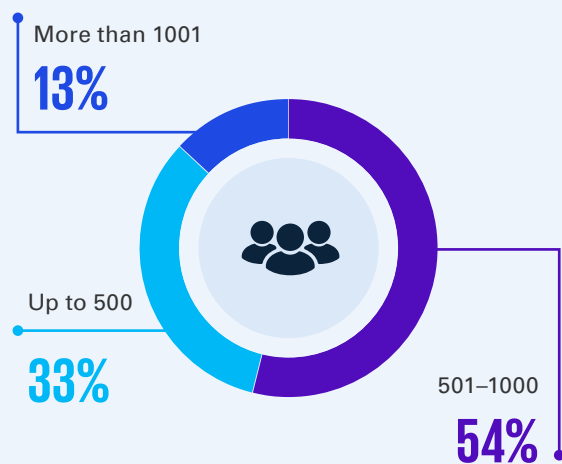
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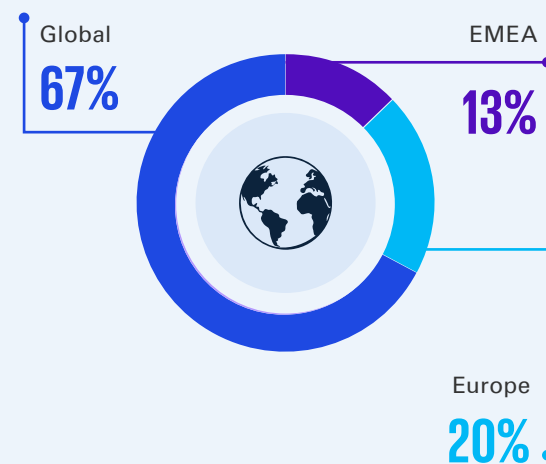


**How many employees does your Łódź-based center currently have?**

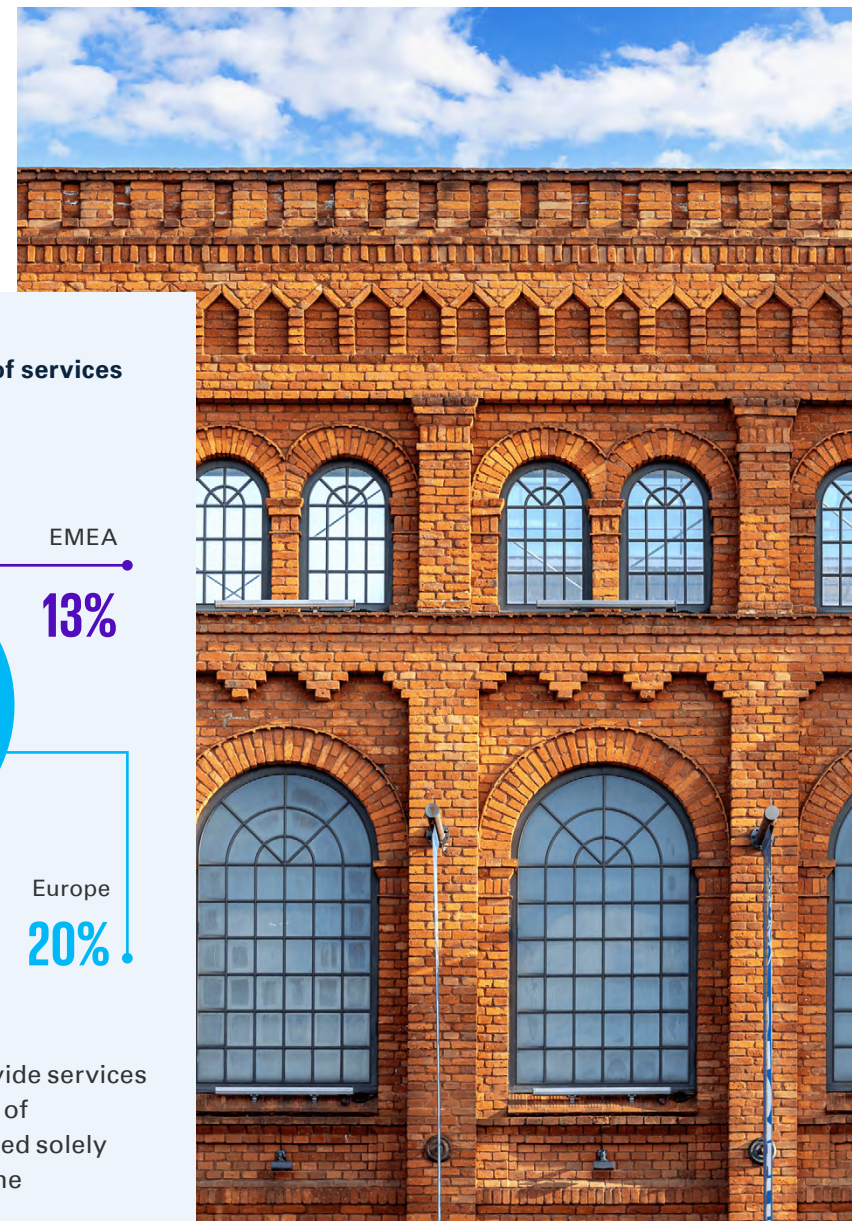


More than half (54%) of all the surveyed Business Centers have more than 500 employees and 33% employ up to a 500 people. The biggest centers, employing over 1000 professionals make up 13% of all respondents.

**What is the geographical scope of services delivered from your center?**



The majority (67%) of centers provide services for entities with global reach. 20% of respondents provide services aimed solely at Europe, while 13% is covering the EMEA region.



**Image:** Characteristic facades of post-industrial buildings in Łódź.

What types of processes does your center currently deliver?  
(Multiple choice question)



Every interviewed center provides operational processes and majority of them also provide expert-level processes. Two respondents are delivering additional, undisclosed processes.



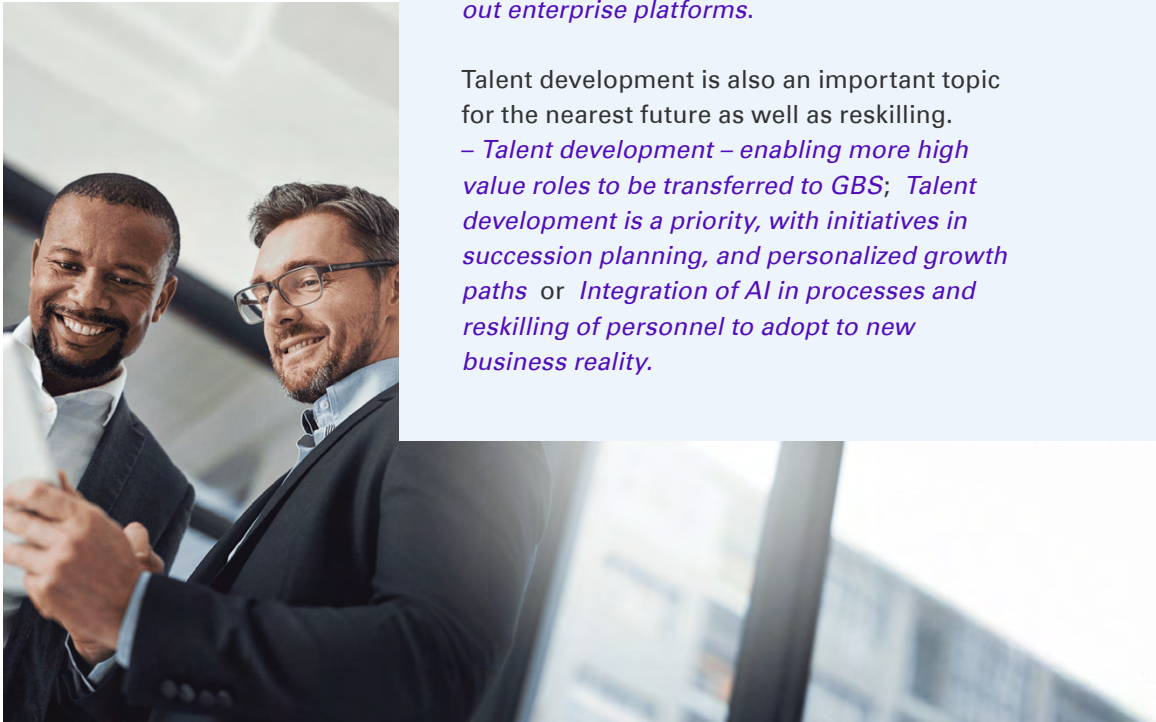
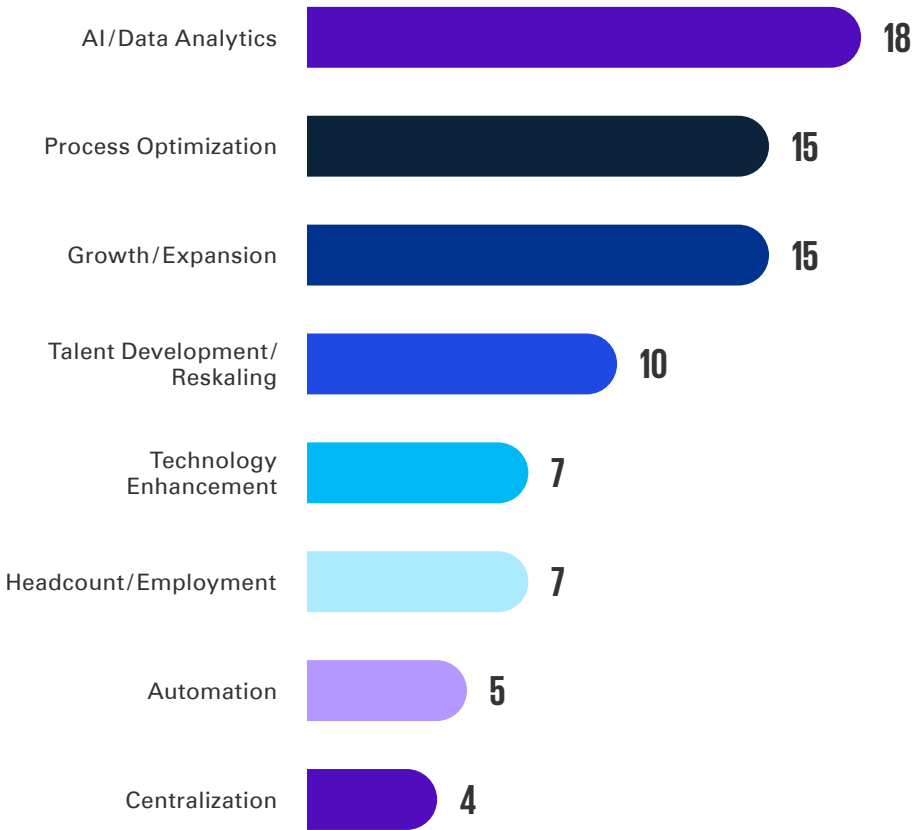
Answers provided in the organization profile section provides interesting findings regarding the reach and role of local GBS sector.

The majority of centers located in Łódź employs less than 1000 professionals, but that doesn't limit the reach of their operations. Two thirds of surveyed centers provide services with global outreach which further supports the global capabilities of the sector.

The maturity of Łódź GBS centers is highlighted by the high amount of expert-level processes in the process portfolio mix. The findings suggest that Łódź is becoming an important hub for knowledge intensive processes without particular limit for the scale of operations.

# Section 2: Knowledge-Intensive Services

What are your organization’s development plans for the next 2–3 years? Please elaborate on areas such as anticipated growth, process optimization, technology integration, talent acquisition, or other relevant priorities. (Open-ended)



Main areas of development acknowledged by the respondents are process optimization and focus on automation and AI implementation, and were highlighted by more than half of the respondents.

Additionally for some, expanding on new markets is the goal and for few expanding the portfolio of services including financial services, high-end services and GCC services. – Over the next 2–3 years, our organization is focused on growth, operational excellence, and digital transformation. We’re expanding capacity in key locations, optimizing processes for reliability and cost-efficiency, and rolling out enterprise platforms.

Talent development is also an important topic for the nearest future as well as reskilling. – Talent development – enabling more high value roles to be transferred to GBS; Talent development is a priority, with initiatives in succession planning, and personalized growth paths or Integration of AI in processes and reskilling of personnel to adopt to new business reality.



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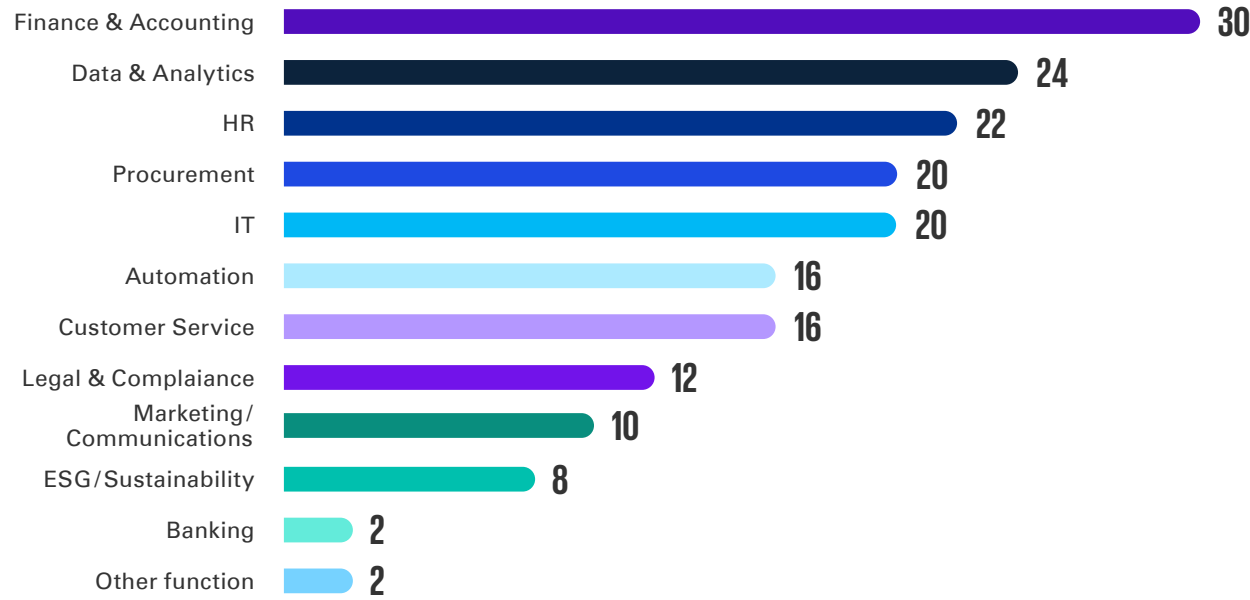
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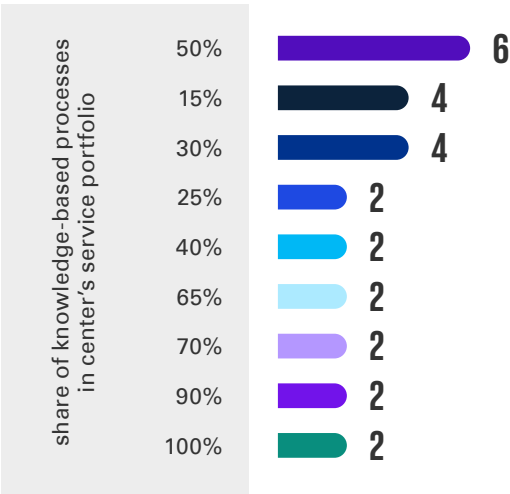
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Which functions or business areas does your center support?



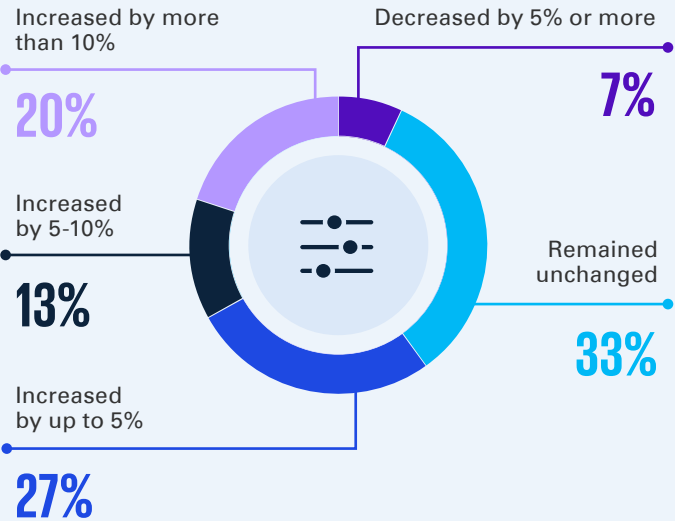
Every surveyed center delivers Finance & Accounting services, while Data & Analytics and HR stand out with over 24 and 22 answers respectively. Procurement, IT, Automation and Customer Service are delivered by over half of the respondents. Legal & Compliance, Marketing/Communications and ESG / Sustainability are provided by 30% of the centers on average. Banking and other functions close out the poll with 2 answers.

What is the estimated percentage share of knowledge-based processes in your center's service portfolio? (%)



In total, more than half of respondents have stated that knowledge-based process make up 50% or more of all the processes in the center's service portfolio. Twelve of surveyed centers informed that the knowledge intensive processes stand for less than 50% of their process portfolio.

How has the scope of services delivered by your center changed in the past 12 months?

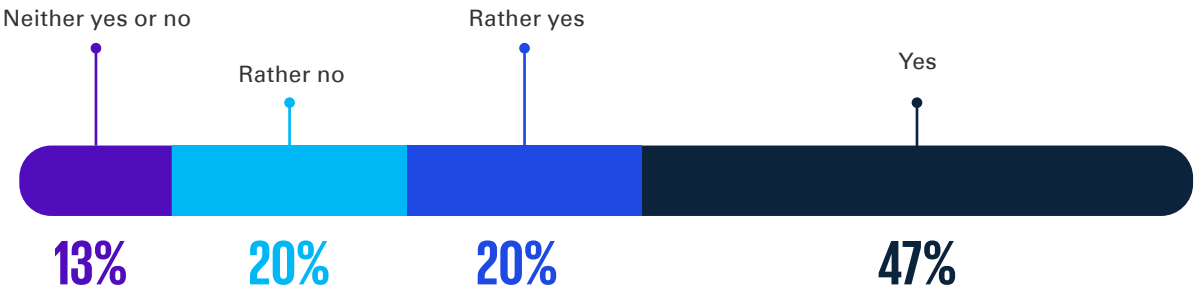


The scope of delivered services has remained unchanged for 33% of the respondents in the past 12 months. In total, 60% of respondents have noted scope increase, with only 7% surveyed centers reported decrease of their scope.

This section of the study directly reinforces findings of the first section. Łódź GBS sector look healthy and resilient with majority of respondents reporting increase of the scope in the past 12 months.

Almost half of the respondents expect their process portfolio to grow in the next 2-3 years, showcasing strong growth momentum.

Does your organization plan to expand its portfolio of knowledge-intensive processes in the next 2-3 years?



Almost half of organizations surveyed confirms that they plan to expand their knowledge-intensive processes portfolio with a fifth considering it a possibility. Another fifth is opposing, and the rest did not specify their opinion.

The maturity of the sector is once again underlined by the mix of the knowledge intensive processes, with more than half of surveyed companies boasting at least 50% share of such processes in their portfolio mix.

# Section 3: Skills, Languages, Capabilities

Which foreign languages are most required in your center?



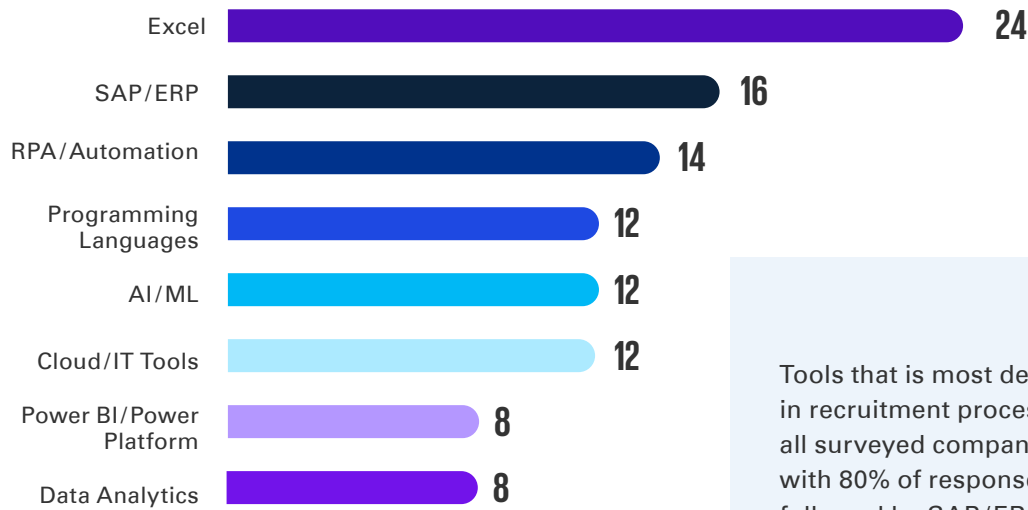
English is still the primarily used language in all surveyed centers, followed by the German language for which 20 respondents determined that it's at least often required in their center. Spanish and Italian languages were mentioned as required in around half of the responses. Less than a third of respondents selected either Italian, Dutch or Nordic languages.

What are the most important skills among employees in your center?



The most important skills among employees in Łódź centers are Analytical Thinking, Ability to work in complex environments, Digital tool proficiency, Communication skills and Customer orientation, with all of them receiving comparable amount of responses. While managerial capabilities received the least amount of responses, they were highlighted as important by 33% of surveyed companies which stand for a strong result.

What digital skills or tool expertise are currently sought after in your recruitment process?



Tools that is most demanded in recruitment processes across all surveyed companies is Excel with 80% of responses, followed by SAP/ERP skills and RPA/Automation knowledge with 53% and 46% respectively. More than third of responders determined that AI or Machine Learning skills are sought after in their recruitment process which place them on par with Programming Languages and Cloud/IT tools.



Results in this section provides deeper insight into the current needs of the businesses and the common requirements for candidates sought after during recruitment processes. In terms of languages, English, German and French are the usually most required, however demand for other languages is quite significant as well which corresponds well with the sector global characteristics highlighted in the previous sections.

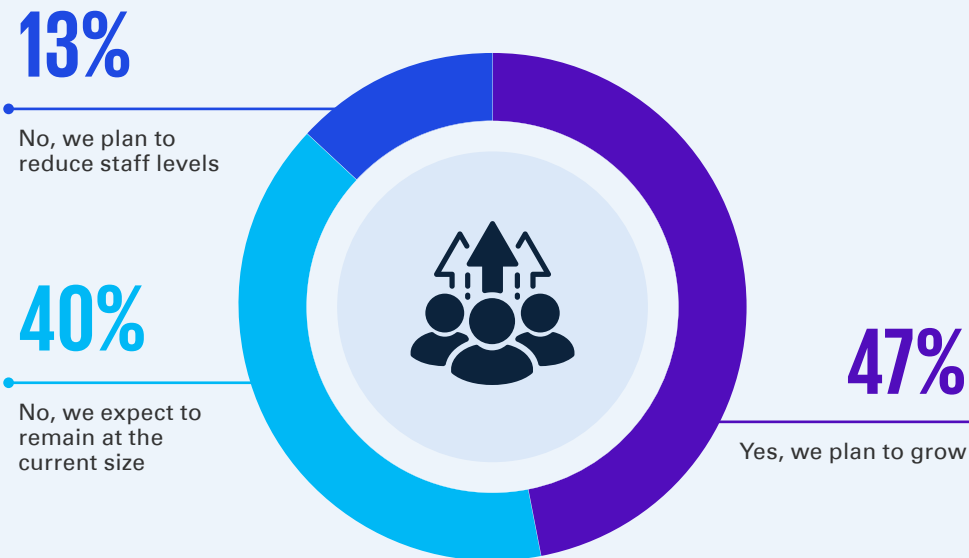
**In terms of skills and abilities, proficiency in Excel or ERP tools is among the most sought after, but more than a third of respondents highlighted the demand for AI-skilled professionals.**

If we take into consideration that the AI industry is still quite new, the demand seem to be drastically high, as it is already one of the most common requirements across all answers.

# Section 4:

## Hiring and City Attractiveness

Does your organization plan to increase headcount in the next 12 months?



Almost half of the organizations plan to increase their headcount. On the contrary, over a tenth of respondents plans to reduce their staff levels. The rest (40%) plans to remain at the current size.



Are you currently collaborating with local universities in any of the following ways?

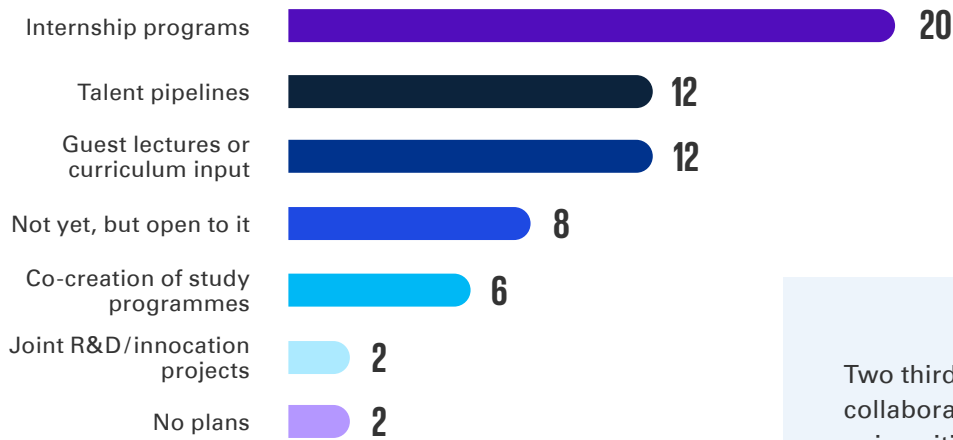


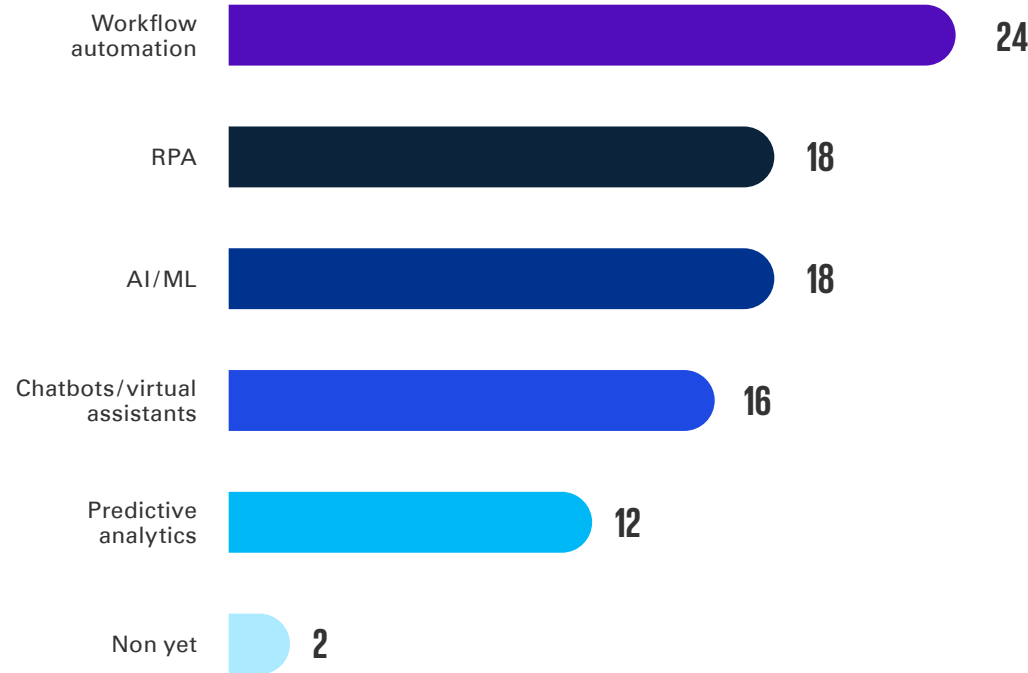
Image: Faculty of Law and Administration, University of Łódź.

Two thirds of organizations collaborate with local universities by Internship programs. Almost half uses Talent pipelines and Guest lectures or curriculum input. The remaining, less popular options involve Co-creation of study programs, and Joint R&D/ innovation projects. 8 centers are not collaborating but are open to do so in the future while 2 have no plans for such involvements.



# Section 5: Technology & Digitalization

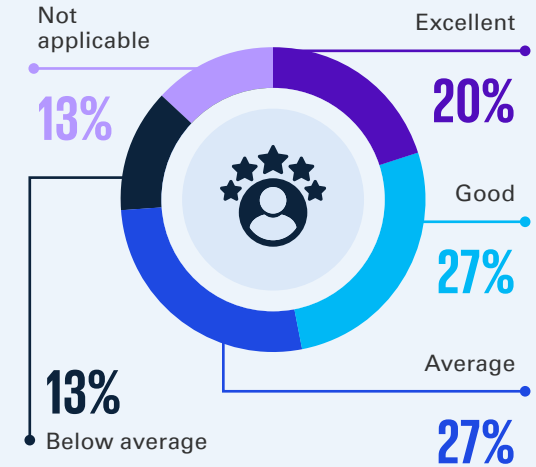
Which technologies are already in use in your center?



Technologies used by Business Centers involve Workflow automation, Robotic Process Automation, Artificial Intelligence and Machine Learning, Chatbots or other virtual assistants and slightly less popular Predictive Analytics. 2 centers do not use any of the mentioned methods.



If your organization has sourced digital talent from Łódź, how would you rate the city's accessibility to such talent?

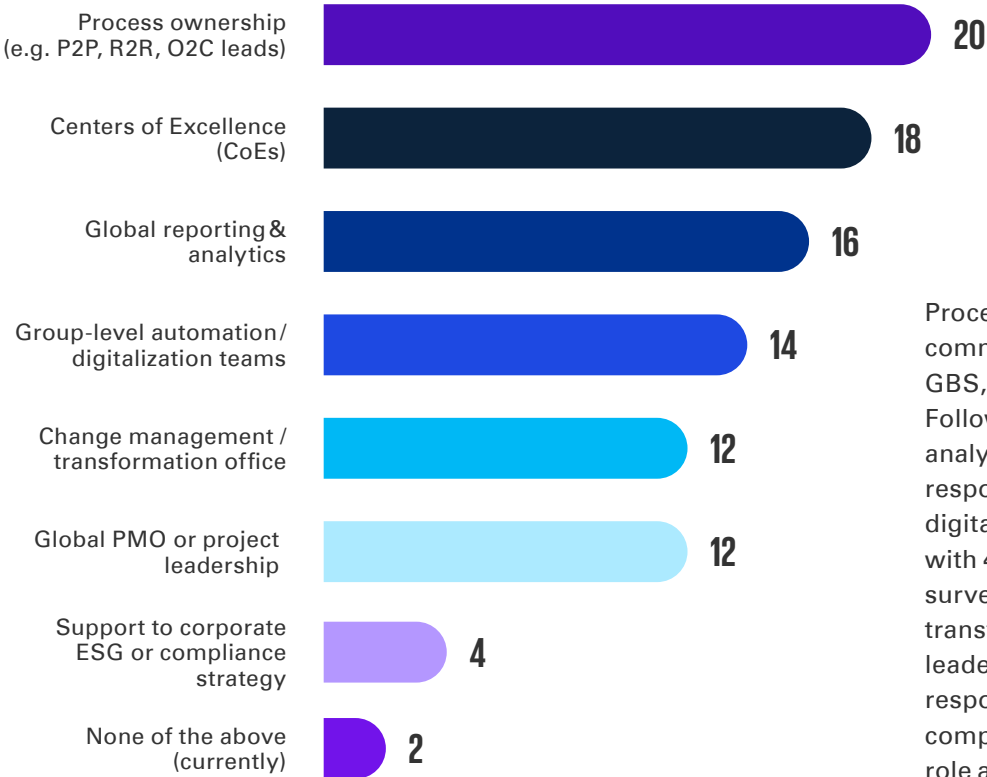


Talent availability has received very mixed assessments. 20% and 27% of centers grades it as Excellent and Good respectively. 27% rates it as average, 13% as below average and last 13% has not sourced digital talent from the city.

# Section 6:

## Strategic Role of the Business Services Center

Which of the following global or cross-functional roles are (or will be) managed from your center?



Process ownership is by far the most common role performed by the surveyed GBS, securing exactly 66% of responses. Following it, CoE's, Global reporting & analytics were selected by more than half respondents. Group level automation / digitalization was a 4th most common role with 46% share of roles managed by surveyed centers. Change management / transformation and Global PMO or project leadership both were selected by 40% of respondents. Support to corporate ESG or compliance strategy is the least common role among surveyed centers.



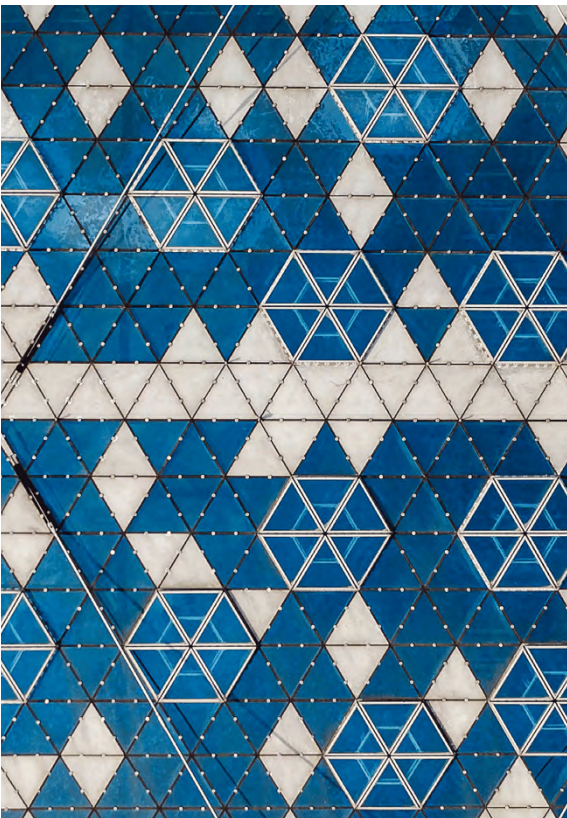
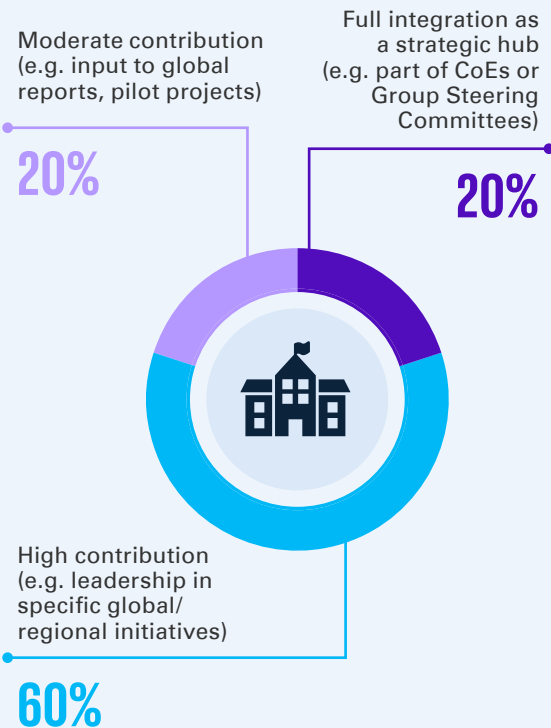


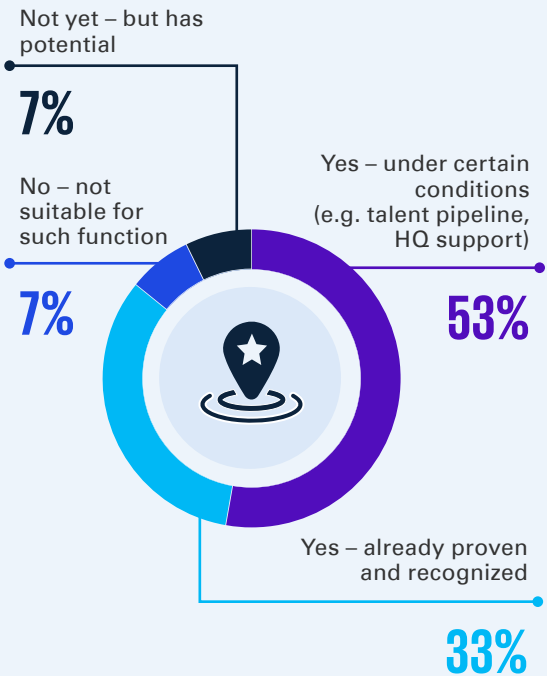
Image: An aerial view of the roof details of Łódź Fabryczna Railway Station.

To what extent does your center in Łódź contribute to global or regional strategic decision-making processes?



60% of all surveyed centers highly contributes to global or regional strategic decision making. 20% is fully integrated which means they are a strategic hub of the organization. Remaining 20% contribute moderately which means they have an input to global reports or pilot projects.

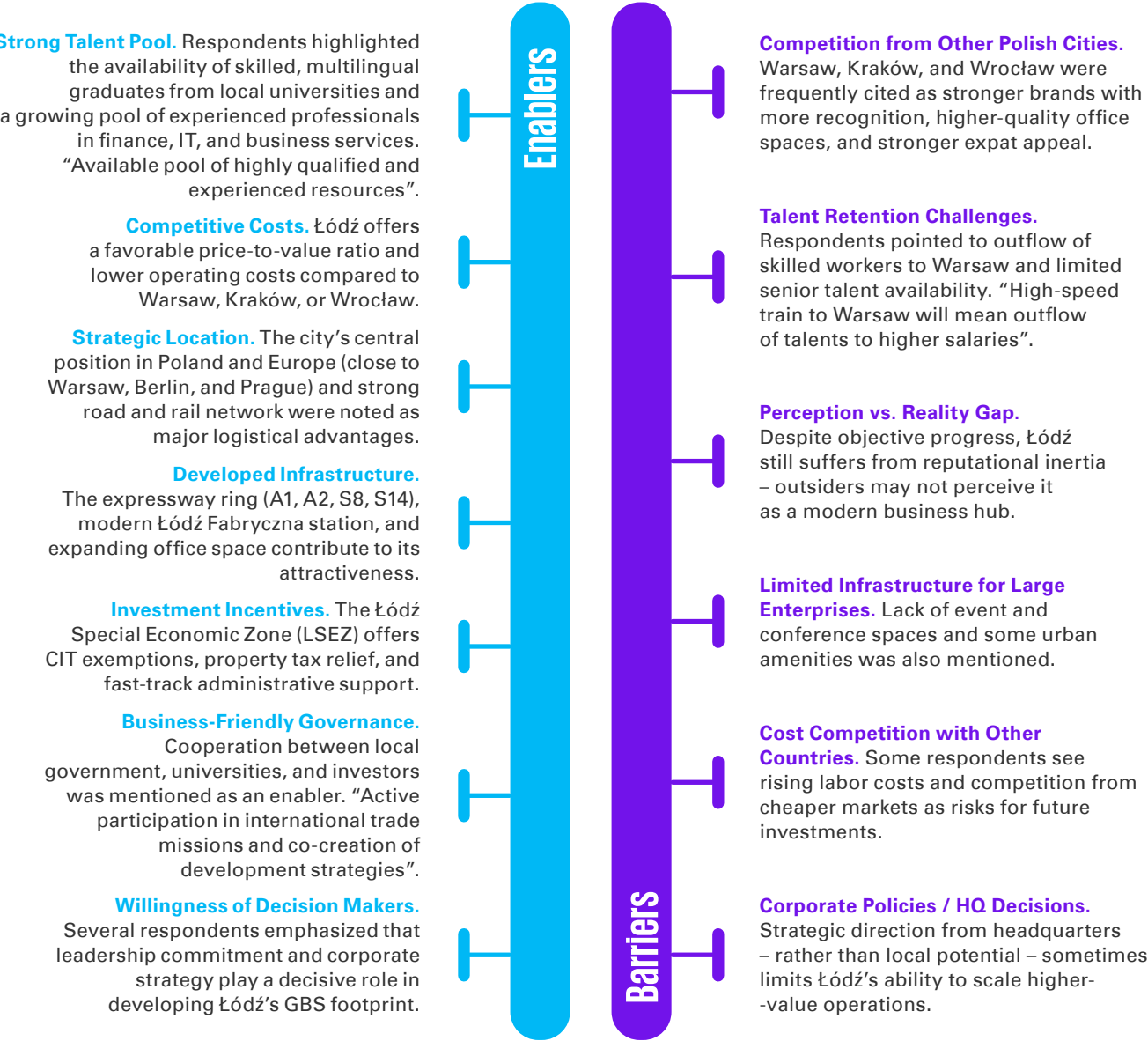
In your view, is Łódź a suitable location for expanding C-level or enterprise-wide functions (e.g. Global PMO, Data & Analytics, GPO, etc.)



Most of the responders view Łódź as a suitable location for expanding C-level or enterprise-wide functions under certain conditions. A third of them claims that the city has already proven its capabilities. 7% of center's leaders think that the city is not suitable for such functions. The last 7% think it is not yet, but has potential

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What are the main enablers or barriers for developing Łódź as a hub for high-value or global enterprise functions? (Open-ended)



The findings of this section portrays the rising importance of local GBS centers in the grand strategic outlook of their companies. Majority of respondents already determined that their GBS is delivering high contribution to the specific global and regional initiatives.

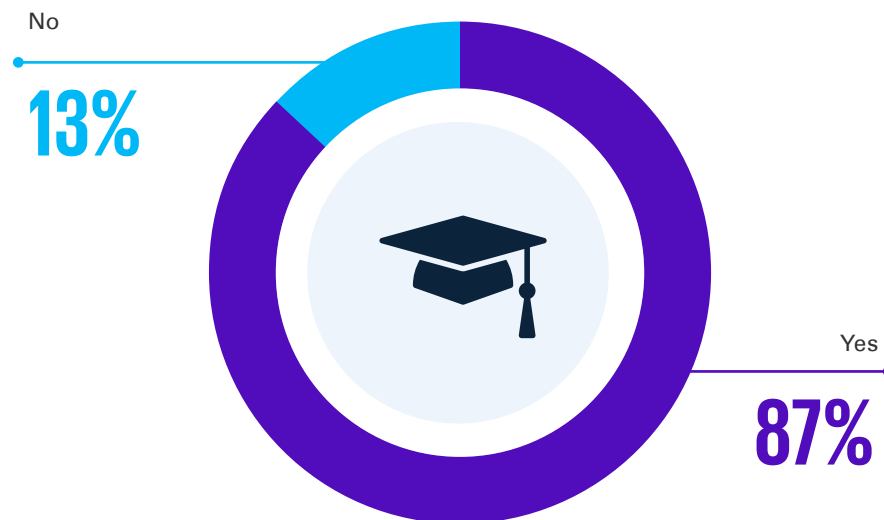
**A third of respondents confirmed that Łódź has already been recognized as a suitable location for expanding C-level or enterprise-wide functions, with staggering 53% determining that it has potential to expand such functions under certain conditions.**

Suggestion of some of these conditions may be found among most commonly named barriers and enablers as provided by the respondents. It's worth noting that the vast majority of enablers directly correlates with the key aspects of Łódź mentioned in the previous chapters of the report. This underlined that the city is aware of it's key strengths and is using them as a source of the competitive advantage. On the other hand, barriers named by the respondents, may stand a source of improvement of certain aspects. Completion of such improvements may entice more companies to extend the scale of their operation in Łódź and directly reinforce the importance of the city in the strategic view of combined operations.

# Section 7:

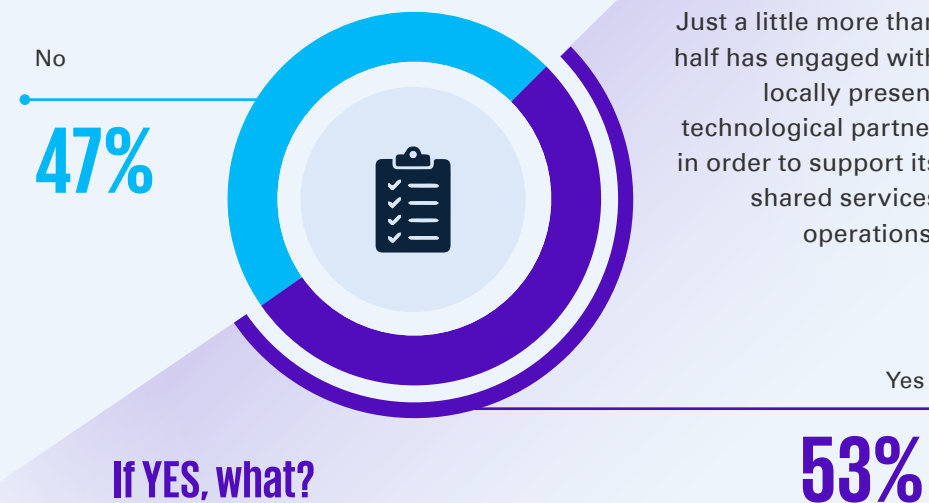
## Łódź – 2030 Vision & unique local aspects

Do you see potential for a new study program created in partnership with local companies and the University of Łódź or Łódź University of Technology?



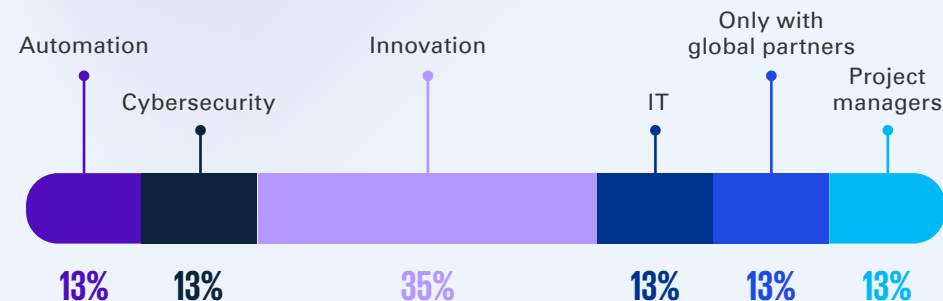
Vast majority of centers sees a potential for a new study program which can be created in partnership with local universities. Only 13% think such potential does not exist.

Has your organization engaged with any locally present technological partners in Łódź to support its shared services operations?



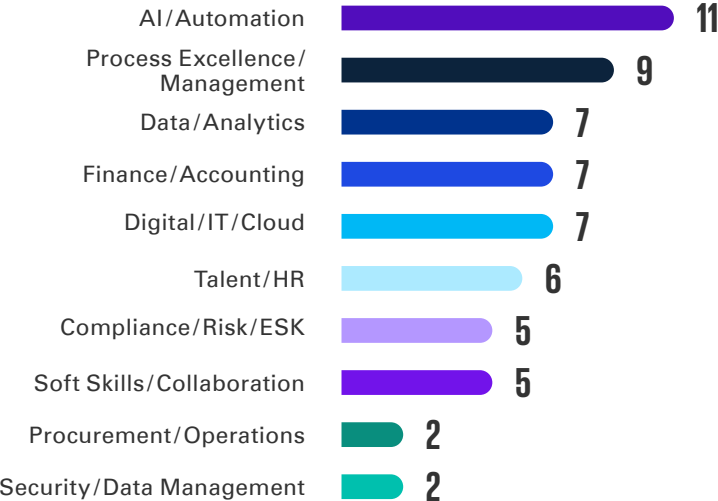
Just a little more than half has engaged with locally present technological partner in order to support its shared services operations.

If YES, what?

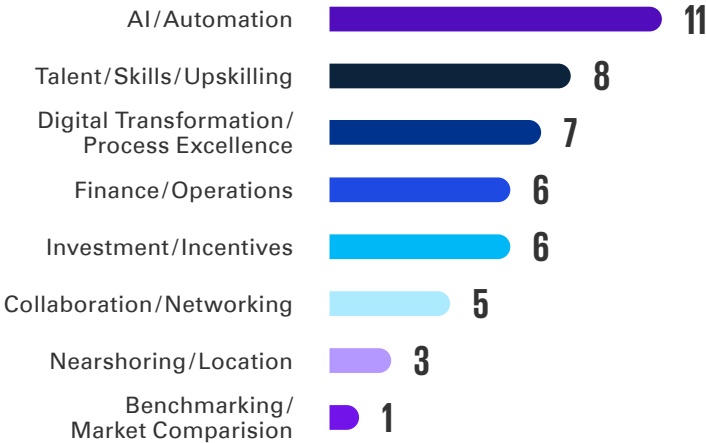


Out of those, who have engaged, most of them have done so with Innovation partners. The rest is equally split between IT, Cybersecurity, Automation, Project managers and Global partners.

Do you see potential for a new study program created in partnership with local companies and the University of Łódź or Łódź University of Technology? If yes, which business areas or competencies do you think such a program should cover?



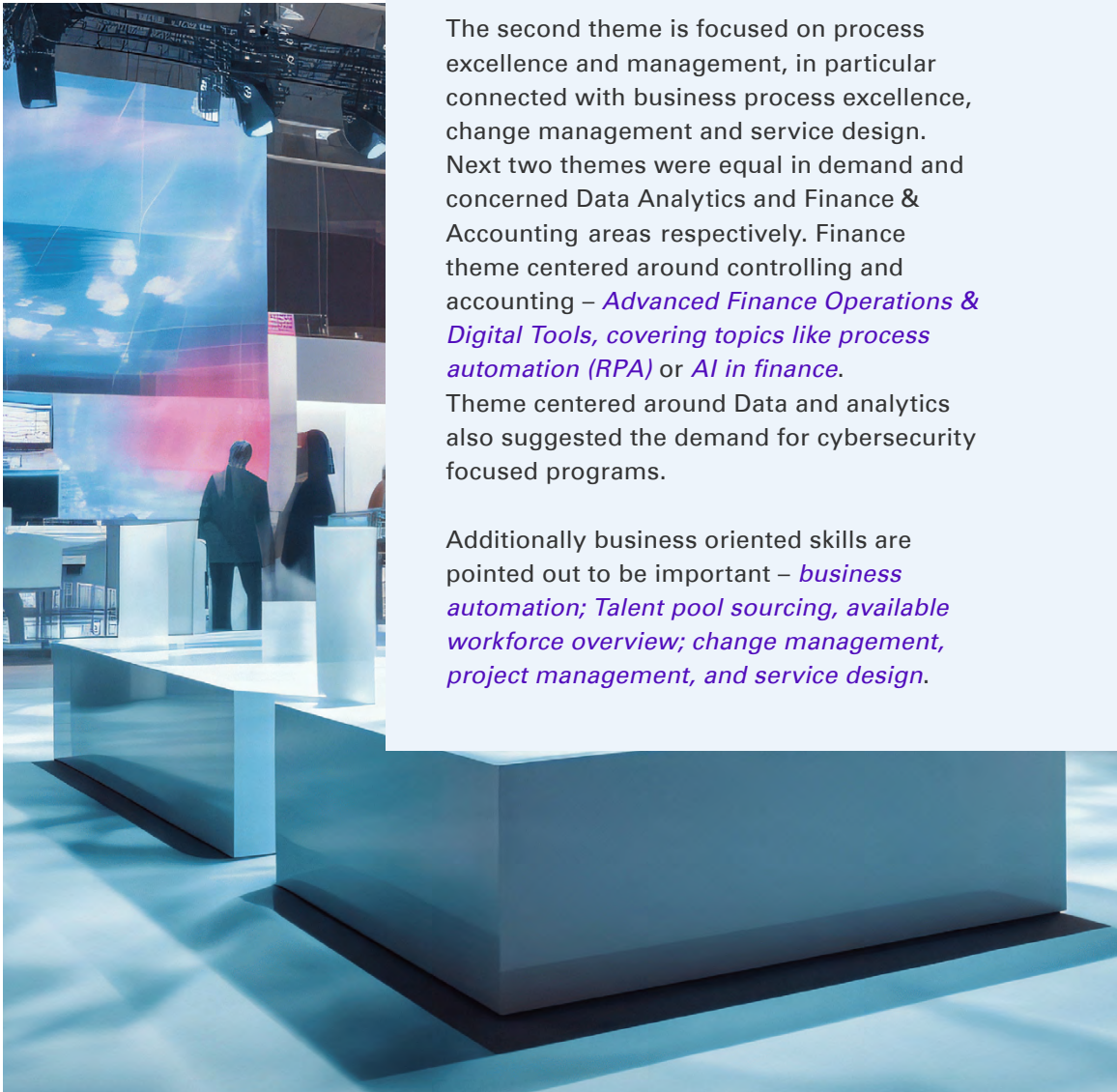
What types of events would potentially be in demand for the Business Services sector in Łódź?



The main topics suggested for a possible study program include mostly ideas centered around AI and automation – AI in practice, prompt engineering, digital transformation.

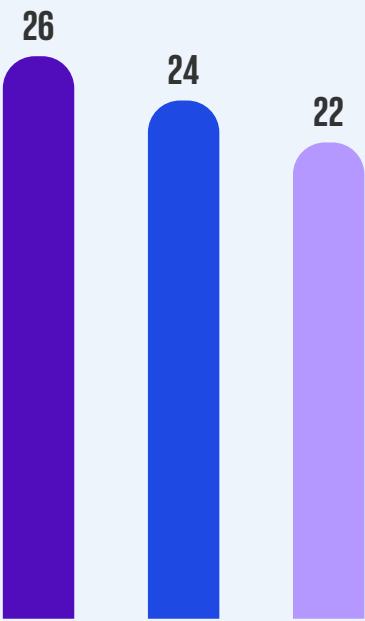
The second theme is focused on process excellence and management, in particular connected with business process excellence, change management and service design. Next two themes were equal in demand and concerned Data Analytics and Finance & Accounting areas respectively. Finance theme centered around controlling and accounting – *Advanced Finance Operations & Digital Tools, covering topics like process automation (RPA) or AI in finance.* Theme centered around Data and analytics also suggested the demand for cybersecurity focused programs.

Additionally business oriented skills are pointed out to be important – *business automation; Talent pool sourcing, available workforce overview; change management, project management, and service design.*



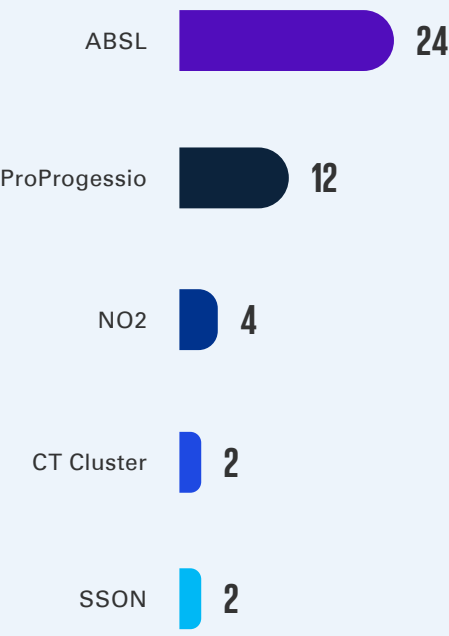
Is your company currently participating in any of the business initiatives taking place in Łódź? (select all that apply)

- Business conferences
- Summer internship programs
- Młodzi w Łodzi internship



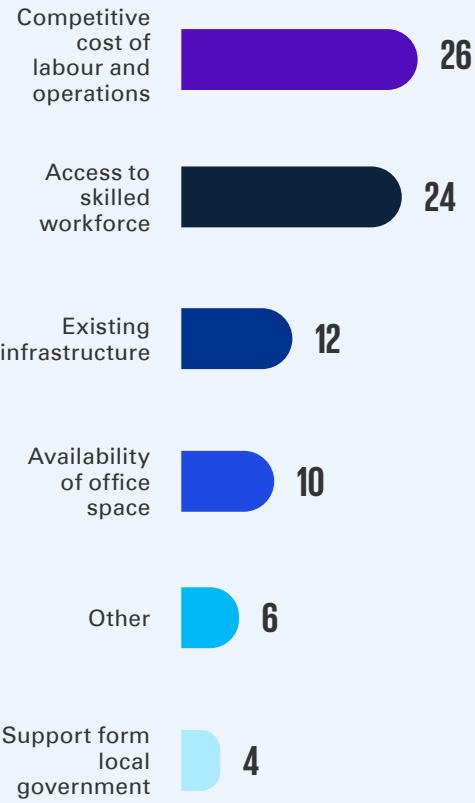
Over two thirds are participating in business initiatives taking place in Łódź. Most popular option is Business conferences. With just two votes less, 24 centers are taking part in summer internship programs, and 22 are participating in Młodzi w Łodzi youth program.

Is Your company currently part of any business organizations or cooperation initiatives mentioned below? (select all that apply)



Prevailed cooperation initiative among Łódź centers is ABSL with 24 responses, followed ProProgressio with 12 responses. Four surveyed centers are part of NO2 program and two centers each declared they participate in CT Cluster and SSON.

What were the main reasons your company chose Łódź as the location for its operations? (select all that apply)



Two main reasons for which companies choose Łódź as the location for their operations are Competitive cost of labor and operations and Access to skilled workforce. Existing infrastructure and Availability of office space also play an important part. Support from local government and other reasons were not highlighted as main reasons.

What three words best describe Łódź as a business services location in 2030? (Open text)



The results of this section align with the findings of the section 6 and once again reinforce the strengths of the city.

**Local GBS sector is clearly displaying the demand for increased cooperation, despite the fact the results at this stage are already satisfactory.**

Eighty percent of surveyed companies belong to at least one business organization and more than half has already engaged in some form of local cooperation. The vast majority of respondents is directly interested in co-creating a study program with one of local universities. The highest demand is observed for programs centered around AI and automation which is aligned with the responses on the topic of potential business centered events. More than 70% of surveyed centers engage in local initiatives boosting young talents and innovations, highlighting not only interest in creating strong talent pool but also underlining the ties between the city and business. Access to skilled workforce was one of the main aspects determining the attractiveness of Łódź for the location of GBS operations, and any initiatives that may further develop this area are of the utmost importance to both the business sector and the city itself.

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# Moving Forward

## Transitioning towards Knowledge-Intensive Processes

Recent years have forced organizations to face the need to adjust to the constantly and rapidly evolving environment. The urgency of transformation is connected mainly with a growing trend of remote and hybrid work but also by the pressure caused by the dynamic evolution of artificial intelligence.

Mentioned progress created not only a challenge but also the opportunity for GBSes to expand the portfolio of offered services in new directions, focusing on digitalization, advanced technologies,

leveraging existing models to create new, improved patterns providing a competitive advantage in the surrounding environment. In order to stay ahead of trends, companies need to answer new, emerging **questions like:**



● **How to balance** advanced technologies and people's workforces?

● **Which ways should be considered** to evolve the operating model in the best possible direction?

● **How can organization make sure** that employees' competences and skills are well-used, and most repetitive and monotonous tasks are being replaced by more knowledge-intensive processes?



With further growth of the sector, it is worth considering some new specialties which can be added to GBSes portfolios. Some of the new directions that are being explored are Global Supply Chain, Legal, FP&A and R&D.

## Supply Chain

In the area of the supply chain, some new trends have been observed during recent years in multiple dimensions. Some of the most important aspects are clients' needs and expectations. It is observed that people are paying more attention

to the quality and speed of the services, which is mainly expressed in their reviews. The supply chain needs to respond to this environment by staying open for suggestions, proper and efficient inventory management and flexibility to the clients' needs. Another significant step in this area is monitoring the market tendency in general to catch the new client expectations towards the whole sector. Trends that have huge impact on the supply chain industry are also digitalization and automation. It is very important to analyze new data and introduce new technical solutions and analyze the latest automation trends, but also keep the balance between costs, profitability and risks coming from the new solutions. Shape of the supply chain is inextricably connected with the geopolitical situation which can potentially create interruptions in the logistics of business. Companies are still dealing with the post-Covid uncertainty but also restrictions connected with events affecting the whole world, like war in the Ukraine or changes connected with West/China trade relationships. Finally, all of the business conditions and increase in usage of virtual channels of communication and services are causing the margin pressure to adapt and lower the operating expenses.

The common conclusion from the above considerations is that the supply chain should generally focus on information management coming from the different dimensions of the sector. It is an excellent opportunity for GBSes to support such analysis and strengthen organizations through development and the introduction of new models of data management. The usual Supply Chain Operating Model has six

high-level steps: Plan, Source, Make, Deliver, Return and Enable. Most companies have converted their model by outsourcing the first steps to contract manufacturers, but the progressive environment nowadays creates the possibility for more structural changes to the operating model. It is worth to re-think the current form, define action needed for particular steps and re-match them with the available sources. For example, in the GBS sector, the order-to-cash and source-to-pay processes typically reach a high level of maturity. Because the Plan and Source stages share similar processes and technologies, and are not constrained by physical location, GBS organizations can effectively leverage their existing business knowledge to deliver these services.

This knowledge can be transferred to GBS, where teams can manage elements of the Plan phase, such as supply chain resource planning, demand and supply planning, and materials requirement schemes. In the Source phase, GBS can support category management, supplier management, and material ordering. GBS can also contribute to the Enable phase, although typically overseen by headquarters due to its complexity and strategic importance, by assisting with sales and operations planning, KPI calculations and reporting for the supply chain, and the implementation of overall business strategy.

As a preparation for portfolio extension by the supply chain services, GBS organizations should continue developing advanced analytical resources, strengthening their expertise, talent,

and data resources. This approach not only reduces costs but also enhances value and creates a competitive advantage. A practical first step is to pilot a small portion of supply chain activities, allowing the organization to build trust and demonstrate the benefits of such a transition.

## FP&A

Progressive Financial Planning and Analysis is currently focusing on areas such as automated reporting with standard variance analysis, as well as automated planning, forecasting, and scenario modeling. Since many Finance functions are already based in GBS centers – making them key custodians of extensive data – this provides a strong foundation for further expanding FP&A services. Shared location of the financial and analytic streams ensures better integration and efficiency of operations and can improve the quality and clarity of the reporting for the management. To build successful, harmonized environment it is important to acquire modern and integrated architecture framework which includes stable ERP systems, planning tools, visualization software's, interactive databases and also properly planned processes flow and particular function's descriptions.

## Legal

The wide and constantly extending range of services offered by GBS centers creates potential



for reorganization of Legal departments and processes within organization. As legal matters are rapidly evolving and changing nowadays, they are creating a huge need for experienced employees with specialized skills. At the same time, in this area, it is difficult to establish repetitive processes within this particular scope, since not only global or EU regulations need to be taken into consideration; country-specific law has big impact on processes as well, making standardization a real challenge. Legal services in organizations focus on internal support of the operational teams, but also legal and compliance reporting. GBS centers are critical enablers for shared, cross-departmental visibility. This creates opportunity for teams to work better and identify holistic solutions for all services provided. Since GBS often includes many specialized teams, such as finance, HR, corporate, IT, it is easier to get on-demand insights and improve processes in all departments, including Legal.

## R&D

High level of the GBS maturity creates also the opportunity of improvement for R&D processes within the company. A high level of automation and well-structured workflows create strong potential to transform the research and development function, which is gaining importance as businesses across industries continue to grow rapidly. GBS experience, knowledge and innovation and leveraging technologies can be used for improving design, services and processes of R&D tasks.

The described directions are only the examples of the new trends of process optimization using GBS structure, but in fact, there are no limits and the possibilities of improvements are endless. The final decision belongs only to the company and should be supported by a thorough analysis of the potential and maturity of GBS and what, in a given



situation, can create a competitive advantage for the organization. Each time evaluation process can be similar to the supply chain analysis – it is important to split the particular dimension in the process steps, analyze closely each point, taking into consideration all the limitations associated and re-think the existing model. GBS environment promises reasonable conditions for organizations to make use of the available resources in order to re-organize the structure, optimize the processes and enter the future with a progressive and competitive environment for clients and employees. Extension of the portfolio can also create a huge advantage in the employment market as the expected career paths are currently very different than even in the recent years. The well-known model of employee growth in one area from the junior specialist to the expert is becoming the past and is slowly being replaced by multidimensional development of the career. People are looking for the possibility to experience work in different areas without constantly starting from the lowest wage brackets. Extension of the GBS structure could be the answer to the market needs as it is creating wide portfolio of job offers.

GBS organizations are already highly mature and capable of managing entire processes, even those that are complex, knowledge-intensive, and non-standardized. With resources such as Centers of Excellence, transactional hubs, automation, and selective outsourcing, they can deliver more sophisticated services to companies. On the other hand, the experience already gathered can also be

used to re-think the existing model of the company and add some additional streams to the GBS responsibilities.

Not only can the services taken from the local units be moved to GBSes, they can also be responsible for designing or implementing new streams in the organization. GBSes are custodians of the huge amount of data and experience, they are constantly improving the processes and have access to new technologies. Continuous evolution, digitalization and persistent need for change management creates a very solid environment for growth of new, more and more knowledge-intensive and value-creating processes and the opportunity for the whole business transformation. GBSes nowadays are not only responsible for basic, repetitive operations, as natural pressure for growth is empowering transformation of the structure to more advanced directions. This creates the urge to convert the existing processes to be more complex and therefore more focused on strategy, decision making and impacting the rules and whole policy of the company. Growing experience of GBSes is also enhancing customer relations and makes the processes more harmonized. As a result, they have the space for experimenting with emerging technology and, in this way, improving business outcomes but also shift workforces to more progressive and knowledge-demanding projects. Expansion impulse arising in the structure is changing the whole view of the GBSes function nowadays. They are becoming an important base which can be used wider in the organization to elevate the workforce quality in the whole enterprise.

# Adoption of digital trends, automation, and AI solutions

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City of Łódź is emerging as a hub for Global Business Services, driven by three components – strategic location, skilled workforce, and digital infrastructure. This is reflected by the transformation happening in the GBS sector, that center around embracing digitalization, automation, and AI to enhance operational effectiveness.

AI adoption in Poland is rapidly growing, with 34% of companies now consistently using AI solutions. The percentage of Polish companies using AI has grown at an impressive rate of 56% in just one year, marking the biggest increase among EU countries. According to the study by Strand Partners (2025), sustaining this momentum could unlock an additional 576 billion PLN for the Polish economy by 2030. The Polish government has acknowledged the opportunities that are

connected to AI and, over the past year, has taken significant steps to harness its potential, among them, a 1 billion PLN investment aimed at strengthening the country's economic competitiveness and national security.<sup>14</sup>

The vast majority of the third of all companies that have integrated AI into their operation have seen positive impacts on business value (83%) and cost savings (79%). As the demand for AI capabilities intensifies, Polish companies face challenges in recruiting suitably skilled professionals. To address the talent gap, 85% of firms are willing to offer higher salaries, with an average proposed increase of 28%, to candidates proficient in AI, cybersecurity, and data analysis.<sup>15</sup>

As global organizations continue to enroll onto AI wave, city of Łódź stands out as a strategic destination for both domestic and international investors seeking to develop new AI-driven innovations. Its strong academic foundations, growing base of technology professionals, and commitment to innovation position it as one of the



key drivers of Poland's AI revolution. Łódź exemplifies Poland's transformation into a center of digital innovation and an AI hub which is validated by the arrival of international technology leaders. Among them, Rococo Co. A Japanese digital solutions provider recently chose Łódź as the location for its new AI focused branch which will focus on solutions already successfully implemented in Japan across sectors like public safety, digital services, and corporate access control. Their leading product – AUTH thru – stands out for its strong emphasis on security, ethical standards, and user-friendly design. Moreover, Sii Polska – a company providing technological and digital transformation consulting chose Łódź in 2012 as a place for one of its first branches. Today, with more than 50 AI professionals they

<sup>14</sup> [https://unlockingeuropesaipotentia.com/\\_files/ugd/c4ce6f\\_90807f89160348029388ee2102599274.pdf](https://unlockingeuropesaipotentia.com/_files/ugd/c4ce6f_90807f89160348029388ee2102599274.pdf).

<sup>15</sup> <https://aboutamazon.eu/news/empowering-small-business/ai-adoption-in-poland-grew-by-36-over-the-past-year>.

help organizations put Generative AI to practical use. They provide AI-powered virtual assistants and agents tailored to client’s needs, along with Computer Vision tools that extract information from images and videos such as detecting defects, recognizing objects, or automating repetitive processes. The company also offers array of NLP tools able to interpret vast amounts of texts. and Data Science solutions that transform raw data into meaningful insights. Together, these technologies allow for elimination of potential errors and streamlining operations with a common goal of improving the decision making process. These investments not only strengthen the city’s position within Poland’s innovation ecosystem but also demonstrates the confidence of global firms in Łódź capacity to host advanced technology operations.

### The Rise of Agentic AI in GBS

Agentic AI refers to Artificial Intelligence systems that possess the ability to set objectives and take independent actions to accomplish those objectives. The autonomous system operate with a high degree and contextual awareness, allowing them to manage and coordinate multiple tasks over time without constant human control.

At it’s essence, an AI agent is a virtual assistant capable of autonomously achieving defined goals by observing its environment, reasoning about available data, and adapting to changing conditions. Rather than waiting for specific human instructions, agents proactively seek ways to accomplish set goals. This ability to reason, plan, and act makes agentic AI particularly valuable in

dynamic business environments where efficiency and responsiveness are key.

Within the GBS landscape, agentic AI is being implemented to transform operations and unlock new levels of performance. It is also emerging as a transformational force, redefining how operations are managed, and decisions are made. It allows organizations to:

- **Automate Complex Processes:** Streamline and accelerate workflows, reducing manual effort and operational costs while improving accuracy and compliance. It can be used for monitoring current inventory needs and automatically place orders based on demand.
- **Optimize Decision-Making:** Deliver real-time, data-driven insights that enhance strategic planning, resource allocation, and performance monitoring. In manufacturing, AI could be used to observe machine performance and flag anomalies or maintenance needs before breakdowns occur.

- **Enhance Customer and Employee Experience:** Personalize services and interactions through intelligent automation and adaptive learning, creating more responsive, user-centric experiences that improve satisfaction and engagement. AI agents are characterized by proactive engagement which can be used for notifying customers about service updates, renewal reminders, or personalized promotions based on usage patterns.

By integrating agentic AI into their GBS operations, leading consumer products companies are achieving cost reductions of 20–30%, efficiency gains of up to 50%, and profit increases of 10–15%, all while expanding innovation and decision-making capabilities without increasing headcount<sup>16</sup>.

In essence, agentic AI represents the next stage in digitalization. It marks a shift from systems that merely follow instructions to those that can think, decide, and act on their own.

16 [https://www.ey.com/en\\_us/insights/consumer-products/agentic-ai-strategies-in-global-business-services](https://www.ey.com/en_us/insights/consumer-products/agentic-ai-strategies-in-global-business-services).



Moving Forward

## AI and ŁÓDŹ GBS Sector

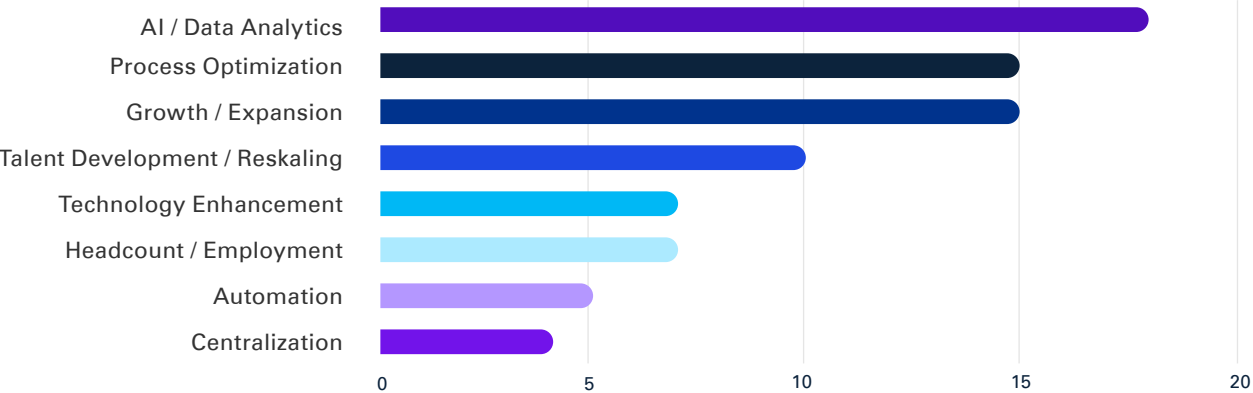
The impact of the AI wave can be clearly observed directly in our research findings. The study have shown that majority of the interviewed companies are planning to execute at least partial implementations of artificial intelligence solutions across their operations. On one hand it shows a great agility of the GBS sector, as companies strive to increase the effectiveness by using new tools to improve their operations. On the other – it demonstrates that the management understands the need for adapting these solutions, and not rejecting them as a temporary tendency. As determined previously – the use of AI tools varies wildly and may find the application almost across all business processes, either via completely replacing small and tedious tasks or by supplementing the more demanding ones with the

combination of the raw processing power and experienced end user harnessing it. As such, implementation of the AI solutions seem to be tailor made for the GBS operations which tend to encompass ever-growing base of both simple and knowledge-intensive processes. Łódź GBS sector seem to be aligned with that trend and with broader adoption of automated functions in general. In questions concerning the development plans for the period of next 2 to 3 years, the majority of respondents highlighted the aim to implement some forms of automation or AI integration to boost the process optimization. The findings are especially interesting as questioned companies tend to provide similar answers despite being from different sectors and having different process portfolio. This further showcase thatthe automation drift is not particular to any field, but rather encompasses the industry as a whole.

As such, the demand for the companies providing such solutions or the ones that have already implemented it will be exponentially higher in the upcoming years. The findings of the study in this area were quite persistent across all respondents, despite the differences in company size, process portfolio or the geographical scope of the services. The name of the game in the GBS sector is process optimization, and the further implementation of the AI solution seem to be perfectly aligned with that goal.

Several respondents also highlighted the use of AI as a mean to improve the talent pool and provide the necessary tools for reskilling and expanding the skillset of the existing employee base. This may also represent the interesting trend in the future, as certain tasks could be fully handled by automated agents, which could pose a threat for the employees. By allowing for reskilling at the early phase of AI implementation, the talent pool could be reshaped onto more knowledge intensive processes, in which the AI would be an enhancement rather than a direct replacement. The ripples of the AI development wave are more visible in certain fields than in others, but are usually aligned with the complexity to demand ratio. Companies that tend to have multiple specific processes dependent on one factor are more likely to introduce the automated solution in order to optimize and standardize the process. The survey research showcased that the GBS which that contain multiple language specific positions are interested in exploring the implementation of such solutions to bolster these processes, with some respondents planning to replace all language specific needs entirely with

What are your organization’s development plans for the next 2–3 years?



Source: Survey for Business Services Leaders in Łódź (SSC/GBS/BPM).



AI in the next few years. With the rapid development of AI-based real-time translation, roles that require foreign language proficiency may become less critical. As a result, businesses could become less dependent on a single factor – such as the availability of language-specific professionals which previously might have hampered their growth due to talent shortages. This aligns with the broader goal of process and cost optimization as two main driving aspects of the AI revolution.

Language proficiency remains a competitive advantage across all business areas. Bonuses range from 300 up to 1500 PLN, with the highest rewards offered for German, French, Dutch, and Nordic languages especially in customer-facing and operational roles. This indicates both high market demand and limited availability of specialists in these language groups. AI can play a crucial role in addressing the shortage of multilingual specialists and bridging communication gaps in business in general. Modern AI translation tools can provide real-time translation of both written and spoken content which reduces dependance on certain language speakers. As a result, organizations can maintain high-quality communication with global partners even when the supply of qualified language specialists is limited, effectively shortening the distance between markets.

The challenges of company-wide AI implementation are recognized by the executives which is reflected in the aspect of partaking in business events. A majority of respondents expressed interest in exploring AI from both theoretical and practical perspectives. On the theoretical side, topics range from AI-driven change management to talent

Financial Incentives for Language Proficiencies in Łódź

| Area             | Position                     | Language                      | Financial bonus (PLN) |
|------------------|------------------------------|-------------------------------|-----------------------|
| Accounting       | Accountant                   | German, French, Dutch, Nordic | 500-1000              |
|                  |                              | Spanish                       | 400-500               |
| Customer Service | Customer Service Specialist  | German, French, Dutch, Nordic | 500-1500              |
|                  |                              | Spanish                       | 300-500               |
| Order Management | Order Management Specialists | German, French                | 800-1000              |
|                  |                              | Dutch, Nordic                 | 800-1200              |
|                  |                              | Spanish                       | 400-500               |

Source: Figures derived from Antal recruitment process data, as of October 2025.

sourcing, suggesting that some companies are committed to integrating AI into their operations at a strategic level and are actively exploring methods to do so. This represents more structural approach in which AI is viewed as an integral element in company’s longer-term strategy rather than a temporary tool. On the other hand, companies that are only planning the transformation, or have integrated some tools on a limited scale tend to focus more on the immediate, operational benefits of AI in day-to-day tasks. Demonstration of successful AI integration could directly entice more companies to increase their interest in the field, which also creates a ground for cooperation between the businesses. This finds a reflection among some of survey answers which directly hinted at a need

of a cooperation between GBS’s in Łódź in order to incubate city’s AI potential. City of Łódź has already taken first steps toward becoming a national leader in artificial intelligence by signing a letter of intent with the Minister of Digital Affairs in October 2025. This agreement integrates the city into Poland’s Artificial Intelligence Development Strategy. It also position it, as one of the first to pilot the Polish Large Language Model (PLLuM) – an AI model tailored to Polish-language contexts and public sector applications. The PLLuM initiative is designed to support public administration, citizen communication, and educational systems. In Łódź, the model will be tested and developed in real-world applications such as:

- Streamlining municipal services through AI-powered automation.

- Enhancing communication with residents via intelligent chatbots and multilingual support.
- Integrating AI tools into schools and universities to foster digital innovation.

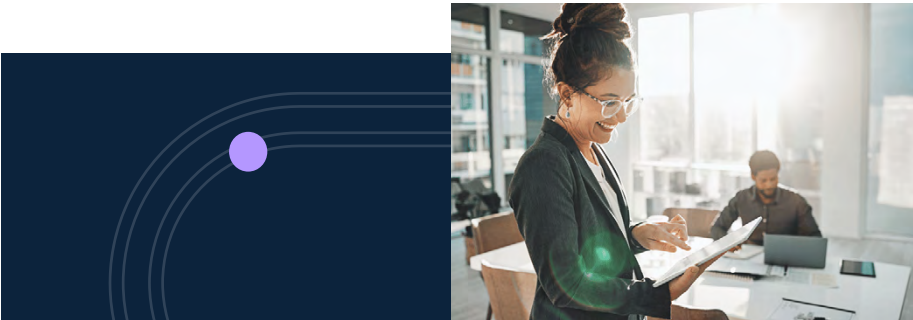
The program, as part of the broader policy “For the Development of Artificial Intelligence until 2030”, emphasizes the need to reduce reliance on foreign AI providers while simultaneously developing models trained on Polish data. Łódź’s early involvement ensures the city’s position as a host for best practices and technical standards for future deployments across the country. Selection for PLLuM implementation is grounded in the city strong academic and technological infrastructure;

Łódź is home to three major universities – Łódź University of Technology, University of Łódź, and Medical University of Łódź – each contributing to AI research and talent development. Local ICT Cluster, in collaboration with Invest in Łódź and local tech firms, actively promotes the region’s potential for AI innovation – with over 30,000 IT professionals and a solid startup ecosystem, Łódź offers an ideal environment for testing and scaling AI solutions. As a result of the above initiatives, city of Łódź is planning to deploy an AI-based urban surveillance system, which will use real-time analytics to monitor public spaces, support traffic management, and enhance emergency response. The model will be developed

in partnership with NVIDIA, a global AI potentate, which represents a pinnacle of the city efforts in regards to improving its technological standards.

In summary, Łódź’s strategic investments in artificial intelligence not only reinforce its position as a national innovation hub but also strengthen its competitiveness as a GBS destination. The demand for the AI initiatives is huge, both from the city’s and the business side, which may lead to increased cooperation in the future. Current development in the AI field will serve in process optimization and cost reduction aspects, which will further underline Łódź competitive advantages.

# Overtaking global functions and capabilities



Łódź has evolved into one of Poland’s most dynamic locations for Business Services Centers transitioning from a primarily transactional support base into a strategic and multifunctional ecosystem. Over the past decade, the city’s business services landscape has undergone a significant transformation from handling standard shared services such as finance, human resources, and procurement, to delivering

advanced, knowledge-based functions that directly, and support global leadership.

This shift reflects a redefinition of the BSC model. In Łódź, many organizations now position their centers as organizational command and control hubs, integrating high-value capabilities and decision-making processes traditionally often reserved for headquarters only. Global companies

leverage the city’s competitive cost-to-talent ratio, advanced digital infrastructure, and deep pool of multilingual, highly skilled professionals to consolidate critical business functions in one location. The modern business services sector was among the first to identify the city’s potential for growth during its economic transformation. Backed by strong academic foundation Łódź is now an attractive destination for service-oriented

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projects. Employing over 35,000 professionals across the entire BSS sector, Łódź ranks now among Poland's leading BSS hubs. The demand for workforce availability in the sector is very high with most sought after and most valuable skills being analytical thinking, accounting, SAP product proficiency, auditing, financial reporting and customer service. The strongest segment of Business Services Sector in Łódź is IT outsourcing, which employs nearly 12,000 professionals, underscoring the city's role as a leading hub for technology-driven services and innovation. The constant growth of this sector is backed by



almost 7000 students on IT related majors<sup>17</sup>. This concentration of IT talent further reinforces strategic appeal to international corporations seeking to centralize complex and knowledge-intensive operations.

As our survey shows, modern BSCs in Łódź increasingly operate as strategic enablers for corporate transformation. They have full ownership of both operational and knowledge-intensive processes and are no longer limited only to transactional or administrative support. They provide advanced analytics and continuous improvement of standardized tasks they are responsible for which is visible in automation-driven efficiency gains. Majority of responders indicated that they highly contribute to global and regional strategic decision making, extending far beyond routine operational processes. Their contribution is visible in various initiatives where they act as leaders coordinating resources and setting directions. This pattern illustrates a broader trend in which BSCs are evolving into strategic partners within their organizations. As responders mentioned, access to a highly skilled and well-educated workforce and collaboration with local universities and the City of Łódź, leads to increased likelihood of further expansion of operations. The synergy between education and industry promotes development of areas in high demand e.g. Data analytics, automation and AI. Top university background combined with real life experience

<sup>17</sup> <https://paih.gov.pl/en/wp-content/uploads/sites/2/2025/07/Polish-Cities-unlocking-the-potential-Lodz-2025.pdf>.

ensures a constant pipeline of talent equipped with both technical and managerial competencies. This combination of talent availability, institutional support, and cost efficiency positions Łódź as one of the most dynamic and future-ready destinations for global business growth in Central and Eastern Europe. This means that many enterprises view Łódź as a already proven and recognized location for C-level and business-wide functions. Companies are no longer establishing branches there solely for transactional support, instead, they are building multifunctional hubs responsible for global process management. Leading global companies are leveraging then-industrial city's advantages to strengthen their operations and drive growth.

The city's BSCs are no longer viewed merely as operational extensions, but as one of the organizational centers, which is directly reinforced by the finding of the survey study. The answers provided by the leaders of local GBS's allow for clearer insight into ongoing operations and long-term perspectives in relation to expanding the scope and process portfolio. Findings of the first section determined that more than 66% of GBS located in Łódź provide their services for business operations worldwide, with only 20% operating on a Europe-wide scale.

The industry is now facing major challenges, including increasing wage pressures alongside rising operational costs. The ongoing push for digital transformation continues to redefine job roles and skills demand; more than ever emphasizing the need for continuous improvement and innovation.

Image: Scheiblers Loft Apartments.



**Łódź offers an attractive case study of a city developing its potential as a hub for global business services.**

**Conclusion**

Its strategic location in Poland, combined with investment potential and already developed infrastructure and technology, makes it an attractive destination for international business operations.

Local incentives, a growing talent pool from regional universities, and a commitment to technological innovation further enhance its appeal. Success stories from major companies who have set up operations in Łódź underscore the city's potential as a destination for business services sector. After all, the city itself is in the pinnacle of such success story, determined to use the technological advantage to secure the place at the forefront of GBS sector in Poland.

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This report aimed to showcase the advantages of Łódź as the key player in the global business services sector, not only in Poland, but also in Europe. The city already possess great infrastructure base – both in logistic and in real estate sectors, which in combination with the strategic location in the heart of Poland pictures it as a prime target for business investments. Local labor market experiences steady influx of talented graduates each year, while low unemployment rate and labor attrition index showcase the resilience of the local business sector.

The report presents significant value for business professionals and companies whom wish to gain deeper insight into city’s GBS sector perspective.

On one hand it may serve as an incentive to review the investment possibilities for companies wishing to move their business to Łódź. Included overview of the city’s key aspect allow for assessment of competitive advantage. On the other hand, the report may serve as an introduction to discussion about the future of GBS sector, both locally and globally. As the city tries to position itself at the forefront of AI wave, the business is following, with a significant amount of companies already implementing some sort of automation initiatives. The implemented study highlight the direction of the GBS sector development and the maturity of the local sector which takes over more global functions each year.



Image: Tram Center Piotrkowska.

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