

Human capital in Łódź

NOVEMBER 2019

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Foreword



**Hanna
Zdanowska**

MAYOR OF THE CITY OF ŁÓDŹ

For the last few years, Łódź has been developing dynamically as a prime destination in Poland and Europe for business development in terms of the pay-to-quality-of-life ratio.

One of the key factors boosting Łódź's popularity among companies is the city's central location and highly qualified, competitive staff. The city has a lot to offer career-wise, in terms of human resources for business, taking into account both top and middle-level managers, as well as regular employees. This is due to a number of activities supported by the city authorities, aimed at creating good living and development conditions.

One of the flagship projects carried out in Łódź is the programme titled "The Young in Łódź", which celebrated last year its tenth anniversary. This programme is a platform for cooperation between employers, universities and young people. It was implemented in order to encourage them to link their future with the city of Łódź, support the development of professional career of students in Łódź and provide local entrepreneurs and potential investors with highly qualified professionals. More than 280 Łódź-based companies and the city's largest universities are actively cooperating under the programme.

Moreover, Łódź is a large university town and one of the most important academic centres in Poland: the city is home to a total of 7 state (public) and 12 private (non-public) higher education institutions. To ensure the development of their students, universities and colleges offer programmes and courses that respond to the needs of the labour market. Both at the University of Łódź and at the Łódź University of Technology, the educational offer is created in cooperation with entrepreneurs, thus providing the opportunity to educate and employ university graduates in specific industry sectors.

What is crucial nowadays is the quality of urban life which we, the city authorities, emphasise too. Infrastructure investments that are currently being made on a large scale in the city of Łódź are intended to make our lives easier and more comfortable to all of us. We believe that in modern economies, cities compete not only for foreign investors, but mostly for inhabitants: potential employees who can be attracted only by creating good living conditions and development conditions.



Artur Skiba

PRESIDENT OF ANTA

Economic development of cities is to a large extent shaped by new investments, both foreign and local. Our observations show that one of the key factors that companies take into consideration when searching for a location to develop their business activity is the human capital in the region.

We also observe that the significance of human capital has been visibly growing in the recent years, and it increasingly often constitutes the main criterion in the decision-making process. This results from the changes taking place in international markets. The fourth industrial revolution means a full coexistence of people, automatic solutions and IT systems in the global environment, and this naturally requires a series of changes in both production and services companies. Attracting employees who are fluent with new technologies becomes a top priority.

The international nature of work requires also a good command of foreign languages – and not only English, but also Slavic, Scandinavian, Iberian and Asian languages. Adjusting to the dynamic changes in the market needs means that it is crucial to monitor the flow of human capital and to develop the talent pool. Conducting regular labour market research allows to make accurate assessments of its current condition and to pursue actions to increase the availability of required competence. City authorities have an important role to play in this process, by sharing the knowledge and shaping a sustainable development strategy for the urban region.

We hope that this material, prepared upon the initiative of the City of Łódź Office, will be a great tool that helps shape the investment plans of entrepreneurs. Their decisions have impact on the job market and the pace of economic development. The gathered research material on the talent pool provides an insight into Łódź as one of the most prospective among the Polish and European cities – a great place to locate investments and an attractive centre for its present and potential residents.

Part 1

Introduction

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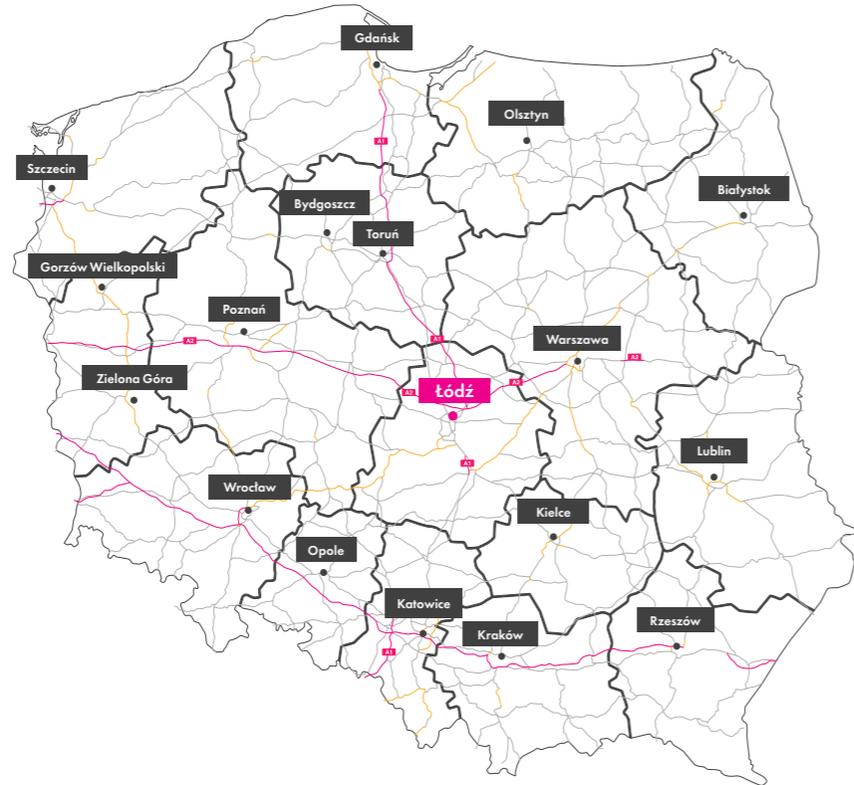
1.01
Location

Łódź, **Poland's third largest city**, is located in the centre of the Łódź Province, in central Poland.

Łódź borders on the following cities: Aleksandrów łódzki, Konstantynów łódzki, Zgierz, Pabianice and the following communes [gminas]: Aleksandrów łódzki, Andrespol, Brójce, Ksawerów, Nowosolna, Pabianice, Rzgów, Stryków, Zgierz.

The administrative structure of the region consists of 21 poviats, 3 cities with poviat (county) rights and 177 gminas, including: 18 urban, 135 rural and 24 urban-rural.

Łódź – location and communication

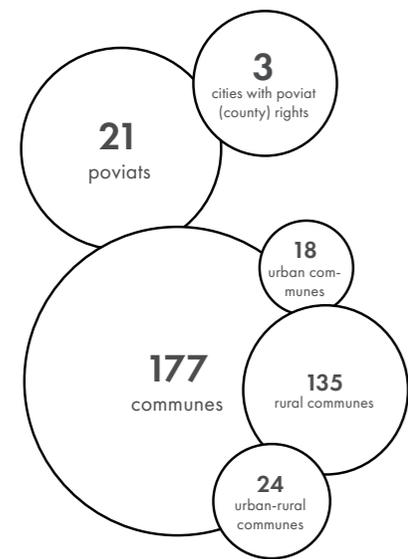


Łódź's favourable location ensures comfortable road transport connections with every large city in Poland. The Łódź Province is located at the intersection of the **North-South (A1) and East-West (A2) European transport corridors**, which provide good access to the markets of the EU member states as well as of Russia, Belarus, Ukraine and Kazakhstan. There are also intersections of major railway lines connecting Warsaw through Koluszki, Toruń through Kutno, and Poznań through Ostrów Wielkopolski with the city of Łódź; while

the rail freight connection service connects Łódź with the Chinese city of Chengdu.

Łódź Metropolitan Railway (Łódzka Kolej Aglomeracyjna) is also very important for the development of the Łódź agglomeration as over 2 million people live within its reach. The railway lines connect the city of Łódź with Sieradz, Kutno, Łowicz, Koluszki, Skierniewice, Tomaszów Mazowiecki, Piotrków Trybunalski and Radomsko; and the Łódź Widzew station to Zgierz.

The administrative structure



1.02
Population

Łódź is home to almost **690 thousand people**, which makes it Poland's third largest city. The metropolitan area is home to over a million people.

The working age population in Łódź amounts to **406,4 thousand**¹.

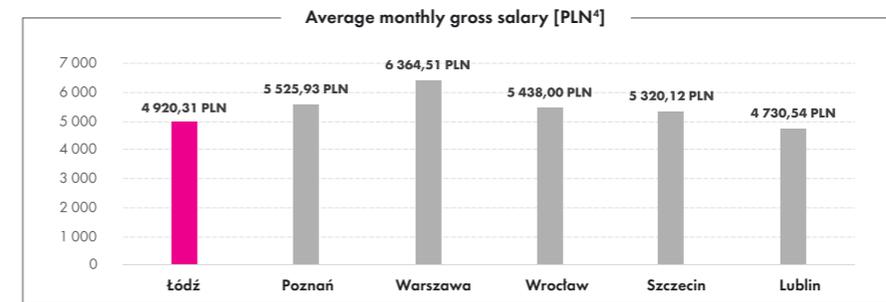
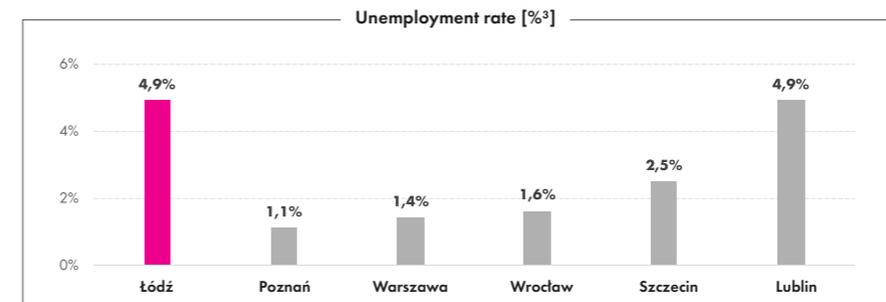
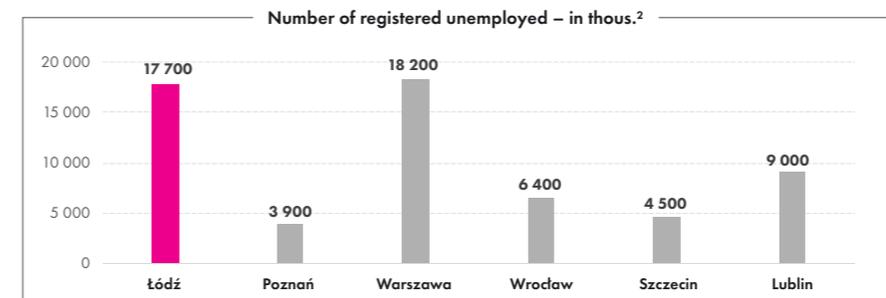
Łódź – the working age population

406 424 people **Łódź**

647 996 people **Region** (East Łódź County (Poviat), Łódź, Pabianice County (Poviat), Zgierz County (Poviat), Brzeziny County (Poviat))

1 529 047 people **Łódź Province**

Unemployment rate and salaries – selected cities and provinces



It is worth noting the city's recruitment potential also in terms of employing foreigners. Łódź is a popular destination for students, specialists and managers as well as for manual workers from abroad. In 2018, the total of 32 423 non-EU nationals were issued work permits; but in fact this number is much higher, if we take into account the non-EU nationals who do not need such work permits.

At the same time, the city has a **relatively low unemployment rate of 4,9%**. The average salary in Łódź is still slightly lower than in other Poland's largest agglomerations, but with an upward trend.

Łódź is also a city which systematically increases its attractiveness as a potential place for relocation. In 2018, according to the Central Statistical Office (GUS), about 4 thousand people from all over the country moved to Łódź.

¹ GUS, X 2019

² GUS, IX 2019

³ GUS, IX 2019

⁴ GUS, 2018

The business perspective

Anna Wdowiak

HR MANAGER
TRANSITION TECHNOLOGIES PSC

Łódź has a multitude of advantages as a city of business. These include a convenient location and transport infrastructure, to name only a few. Its location in the central part of Europe, together with proximity of airports, ensures easy access to the city from almost every part of the world. Moreover, Łódź is still competitive in comparison to other Polish cities in terms of the cost of living, the number of higher education schools that prepare future employees, and access to knowledge and competence of its residents.

In Transition Technologies PSC we value also the support from the city authorities and their initiatives bringing the business together. One such example are numerous business breakfasts organised for entrepreneurs, where they discuss various matters important for the city and its growth. We have also a long-standing cooperation with higher education schools in Łódź. It is a very fruitful cooperation – each year, through various joint actions of our organisations, we hire over a dozen graduates. Additionally, we have the possibility to cooperate with other business entities as part of the ICT Cluster.

We have also offices in other locations in Poland. We see a considerable difference in terms of the potential of employee acquisition. Łódź, being a big city with higher education opportunities and not that far from Warsaw, attracts many job seekers.

The cost of living is low and there are many job offers, thus many persons decide to relocate here. The recruitment processes in Łódź end successfully faster than recruitment processes in our other locations. The city attracts also foreigners with a growing range of Łódź-based companies, and also business areas, in which they can work and develop their competence.

The ICT centres in Łódź develop rapidly. Our example demonstrates that the rapid growth in the number of employees and project areas is the core of the present IT market and also creates the market development potential in Łódź. This industry creates very good work conditions for both Łódź residents and newcomers, and it supports development in niche areas. Also, it is a very diversified industry in terms of the projects pursued, which gives employees an opportunity for a long-term relation with their employers. If the present situation on the market continues – and the trends seem to confirm this – this market will keep developing and creating new job positions.

1.03 Łódź within CEE

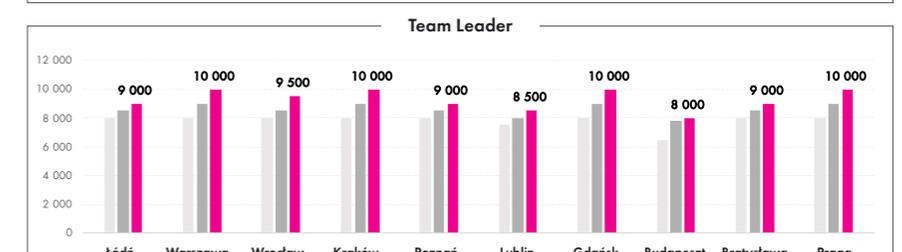
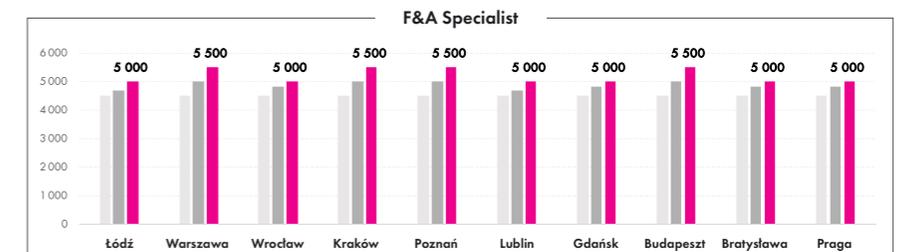
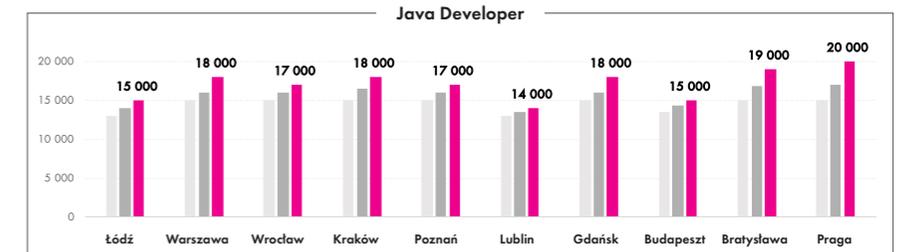
The unemployment rate in Łódź is higher than the average unemployment rate in selected cities of the CEE region. The largest cities within the countries bordering on Poland are characterised by unemployment rates between 1,3% (in Prague) and 3,1% (in Budapest).

Labour costs are still lower than in other cities of the CEE region, while the purchasing power of Łódź employees is still attractive. At the same time, Poland's Gross Domestic Product rose by 4,2%⁵ in the second quarter of 2019. This is one of the best results in the European Union. Poland's GDP growth rate is just behind Ireland, Malta, Hungary and Romania and indicates the high growth potential of the Polish economy.

Against this background, **Łódź is positioning itself as one of the most attractive European locations.**

INTRODUCTION

Level of gross monthly salaries (PLN) for selected job positions⁶



⁵ Source: Eurostat, dane za II kw. 2019 r.

⁶ Antal, on the basis of conducted recruitment processes

Level of gross monthly salaries (PLN) for selected job positions⁶

	Minimum	Median	Average
ŁÓDŹ			
Skilled manual worker	3 800	3 850	4 000
Java Developer	13 000	14 000	15 000
F&A Specialist	4 500	4 700	5 000
CS Specialist	4 500	4 650	5 000
Team Leader	8 000	8 500	9 000
WARSAW			
Skilled manual worker	4 000	4 500	4 200
Java Developer	15 000	16 000	18 000
F&A Specialist	4 500	5 000	5 500
CS Specialist	5 000	5 200	5 500
Team Leader	8 000	9 000	10 000
WROCŁAW			
Skilled manual worker	3 800	4 500	4 200
Java Developer	15 000	16 000	17 000
F&A Specialist	4 500	4 800	5 000
CS Specialist	5 000	5 200	5 500
Team Leader	8 000	8 500	9 500
KRAKÓW			
Skilled manual worker	3 800	4 500	4 100
Java Developer	15 000	16 500	18 000
F&A Specialist	4 500	5 000	5 500
CS Specialist	5 000	5 000	5 500
Team Leader	8 000	9 000	10 000
POZNAŃ			
Skilled manual worker	4 000	4 500	4 200
Java Developer	15 000	16 000	17 000
F&A Specialist	4 500	5 000	5 500
CS Specialist	5 000	5 200	5 500
Team Leader	8 000	8 500	9 000

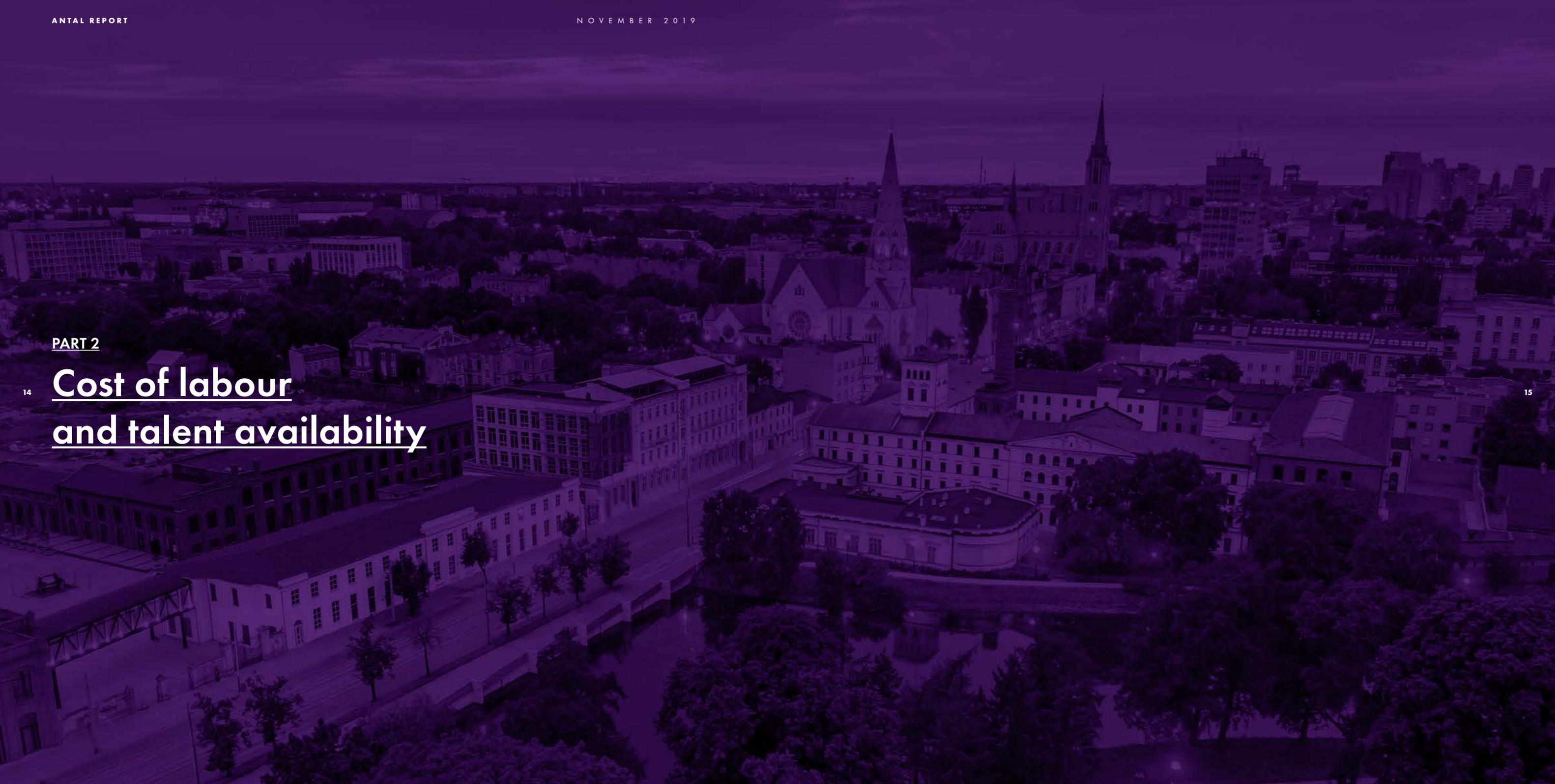
Level of gross monthly salaries (PLN) for selected job positions⁶

	Minimum	Median	Average
LUBLIN			
Skilled manual worker	3 200	3 500	3 500
Java Developer	13 000	13 500	14 000
F&A Specialist	4 500	4 700	5 000
CS Specialist	4 500	4 700	5 000
Team Leader	7 500	8 000	8 500
GDAŃSK			
Skilled manual worker	3 800	4 500	4 000
Java Developer	15 000	16 000	18 000
F&A Specialist	4 500	4 800	5 000
CS Specialist	5 000	5 200	5 500
Team Leader	8 000	9 000	10 000
BUDAPEST			
Skilled manual worker	3 300	3 400	3 500
Java Developer	13 500	14 200	15 000
F&A Specialist	4 500	5 000	5 500
CS Specialist	4 500	5 000	5 500
Team Leader	6 500	7 800	8 000
BRATISLAVA			
Skilled manual worker	3 500	3 800	4 000
Java Developer	15 000	16 800	19 000
F&A Specialist	4 500	4 800	5 000
CS Specialist	4 500	4 800	5 000
Team Leader	8 000	8 500	9 000
PRAGUE			
Skilled manual worker	3 500	3 800	4 000
Java Developer	15 000	17 000	20 000
F&A Specialist	4 500	4 800	5 000
CS Specialist	4 500	4 800	5 000
Team Leader	8 000	9 000	10 000

⁶ Antal, on the basis of conducted recruitment processes

PART 2

Cost of labour
and talent availability



2.01 Salaries and other benefits offered

In the recent years, the changes in the value of salary in Łódź show a growing trend. An average offered salary has increased significantly, especially in such areas as IT, production and logistics, even up to 10-30%.

The growth of salary in the SSC/BPO industry in Łódź has increased on average by 15% in the last 3 years. It should be especially underlined that the growth in salaries of leaders and managers is limited to only 10%.

Standard non-salary benefits offered to office employees by Łódź-based employers include mainly healthcare for employees and, increasingly often, also for their families, sports cards, and also co-financing for language courses. Among those less popular are: a preschool located at the company, a relocation package, a room for relaxation, a game room, co-financing for trips to any location worldwide, divans for pregnant women, discounts for airplane tickets, medical leave with 100% salary paid (10 days in a year), co-financing for holidays, city travel cards, online access to press publications from all over the world, individual training budgets and relocation packages.

For production employees monthly bonuses are more common (15-20%), as well as frequency bonuses of around PLN 200 gross. Those that are less popular include: a company car, co-financing for meals, lunch cards, packages for various occasions (such as holidays or the Children's Day), healthcare for the employee's family, life insurance or modern work tools.

There is no additional recognition of employees who are fluent in foreign languages in the form of language bonuses in the IT, production and logistics industry. SSC/BPO companies most often include such language bonuses in the monthly salary. Language bonuses for the command of Scandinavian languages can be observed in some organisations, ranging from 10 to 40% of the basic salary.

An average offered salary has increased significantly, especially in such areas as IT, production and logistics, even up to 10-30%.

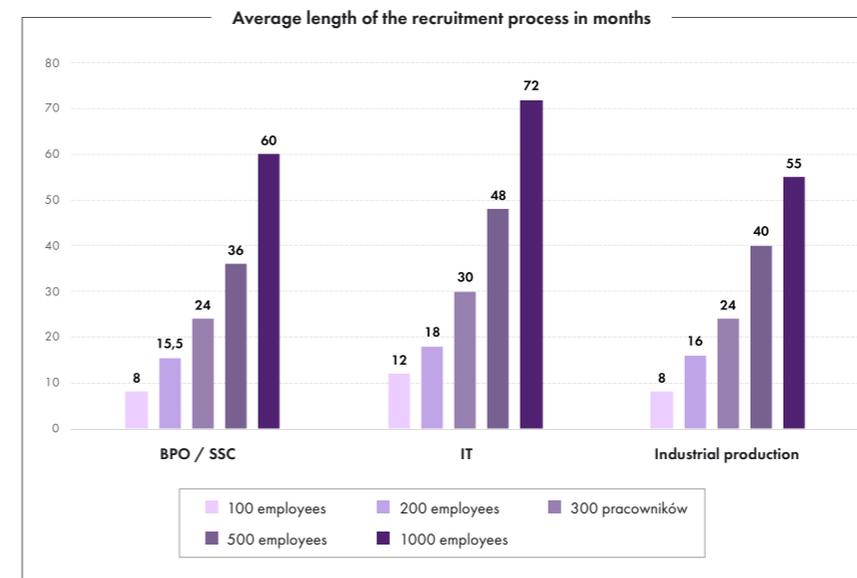
The growth of salary in the SSC/BPO industry in Łódź has increased on average by 15% in the last 3 years.

2.02 Recruitment potential

The length of recruitment projects depends on several factors, but mainly on the experience, measured by the level of competence and the years spent working in the given area.

Large projects, including recruiting even 1,000 employees, they can last up to 6 years.

Average length of the recruitment process – forecast



Average length of the recruitment process – forecast

Number of employees	BPO/SSC	IT	Industrial production
100	7 – 9 months	12 months	8 months
200	14 – 17 months	18 months	16 months
300	2 years	2.5 years	2 years
500	3 years	4 years	3 years and 4 months
1,000	5 years	6 years	4 years and 7 months

Part 3

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Education



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3.01

Secondary education in Łódź

At the beginning of the 2018/2019 school year, 402 secondary schools in the Łódź Province welcomed 69 400 students. The majority of them started education in schools of general education – 30 800 students (44.3% of total students in secondary schools for youth), and in technical schools – 30 300 students (43.7%). The total number of students was lower than in the previous year by 0,9%. There was a visible growth in basic vocational schools – by 84,8%, and in special vocational schools for persons with disabilities – by 1,8%, and a 0,2% growth as regards the technical schools⁷. In June 2018 19 100 students graduated from secondary schools. The total number of secondary school students in Łódź is 26 773.

In the entire Łódź Province 14 900 persons took the secondary school leaving exam, among 16 700 eligible students (i.e. graduates from secondary schools of general education, technical schools and artistic secondary schools of higher education with vocational training), which is 89,1% of the total number (in the previous year it was 88,1%). 13 300 persons were awarded the school-leaving diploma, i.e. 89,3% of the total number of students who took the exam (in June 2017 – 87,2%).

The language competences are of crucial importance for employers. At present, language education is compulsory in secondary schools. In order to pass the secondary school leaving exam, each student has to demonstrate the command of at least one foreign language.

In May 2019 in the Łódź Province 15 632 this year graduates from upper secondary schools took exams from all compulsory subjects, both oral and written parts, in this – 10,156 persons from schools of general education and 5 476 from technical schools. Among this year graduates from secondary schools in the Łódź Province there were 14 868 persons taking an exam in English, 561 – in German, 255 – in Russian, 39 – in French, 26 – in Spanish, and 7 persons – in Italian.

Classes supported by business and higher education institutions

According to the data from the city authorities, in the 2018/2019 school year in 12 Łódź schools there were classes supported by companies and by the Łódź University of Technology – the Faculty of Material Technologies and Textile Design and the Faculty

of Chemistry⁸. In such supported classes from 7 upper secondary schools there are 1 418 students⁹.

The specialisations of such classes include: mechatronics technician, analyst technician, textile technician, sales technician, railway transport technician, railroad technician, technician of engineering installations, installer of rail track, salesperson and waiter. The same type of programme is conducted for the entire school Centre of Vocational and Continuing Education, by the Łódź Federation of Scientific and Technical Associations "NOT". In the Complex of Electronic and IT Schools the supported classes cover the profile of a mechatronic technician at all 5 levels. The total number of students in supported classes ranges between 12 to nearly 300 persons per specialisation in secondary schools.

Language classes

In 6 secondary schools of general education there are in total 30,5 classes with two foreign languages taught, including English, German, French and Spanish. In total, there are 825 students in such classes, thus in a significant manner increasing the human capital potential as regards the linguistic competence of this region¹⁰.

3.02

Higher education

In the academic year of 2018/2019 there were 19 higher education institutions with seats in the Łódź Province. 17 of them are located in Łódź.

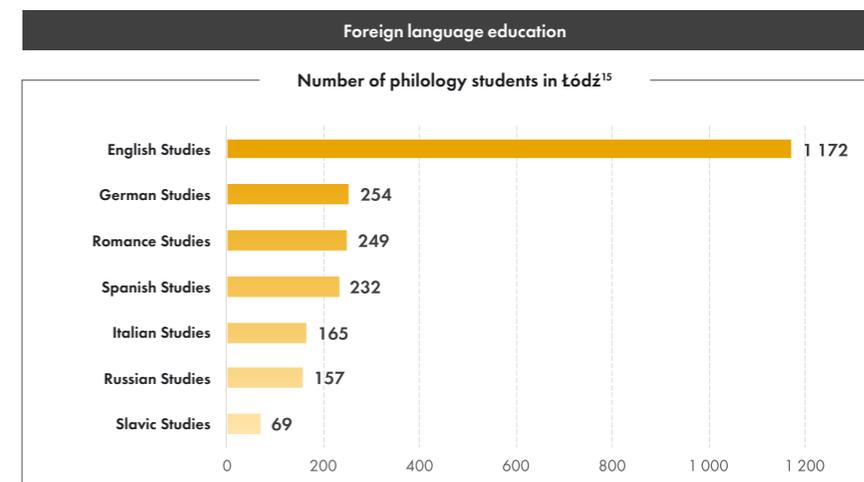
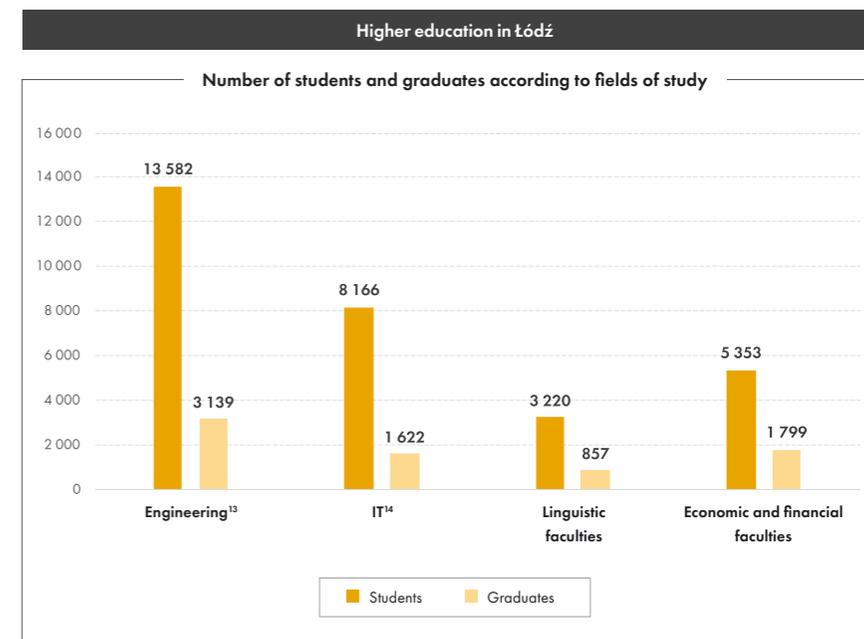
The number of students in the academic year of 2018/19 in this Province was 78 thousand, and by 31 December 2018 nearly 21 thousand graduates received their higher education diplomas¹¹.

The fields of study which are most popular on the Łódź market include – engineering, IT, linguistics and economic and financial majors¹².

Foreign language education

Foreign languages in higher education schools are an important element of the curriculum. Linguistic fields of study are very popular since they offer various classes and the possibility of broadening language skills but also as they come with job market opportunities for graduates.

In the academic year of 2018/19 there are over 3 thousand students with linguistic majors. Philological faculties with the highest numbers of students are presented on the graph below.



¹¹ Data from the Statistics Poland. Students by provinces, schools, groups, sub-groups, names and fields of study (including foreigners). Data as of 31.12.2018.

¹² Data from the Statistics Poland. Students in the Łódź Province by the fields of study. Data as of 31.12.2018.

¹³ Fields of study: mechatronics, textile studies, production management and engineering, food technology and nutrition, material engineering, paper production and printing studies, production engineering, cosmetics technology, construction, bio-economy, construction chemistry – unique field of study, work safety engineering – unique field of study, biomedical engineering, mechanics and machine construction, transport, logistics, environmental engineering, biotechnology, pharmacy, chemistry

¹⁴ Fields of study: data analysis, mathematics, IT science, IT and econometrics, technical and IT education, electrotechnology, automatics and robotics, electronics and ICT, mechatronics

¹⁵ Statistics Poland, academic year of 2018/2019

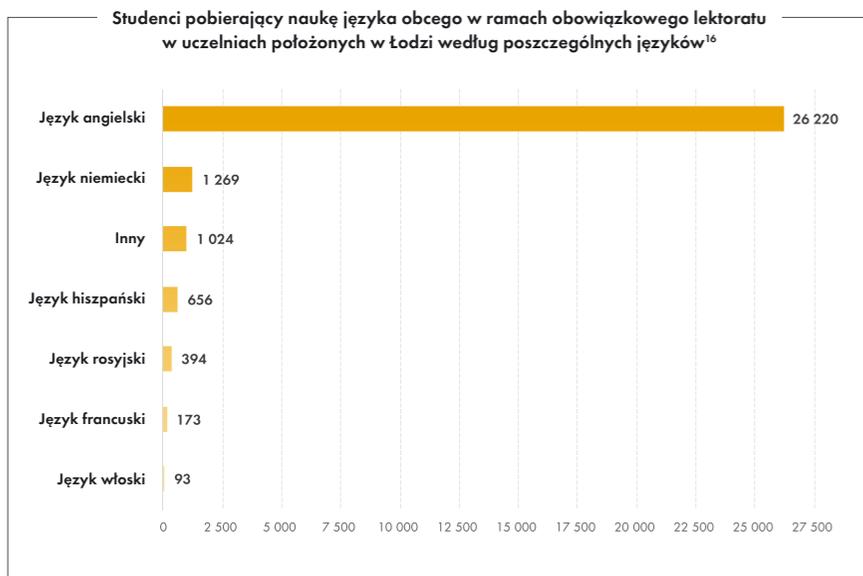
⁷ Statistical Office in Łódź, 31.07.2019.

⁸ City of Łódź Office

⁹ Report by Antal based on interviews in 7 upper-secondary schools

¹⁰ City of Łódź Office

Nauka języków obcych w Łodzi



It should also be emphasized that almost 30,000 students take language course as a compulsory subject.

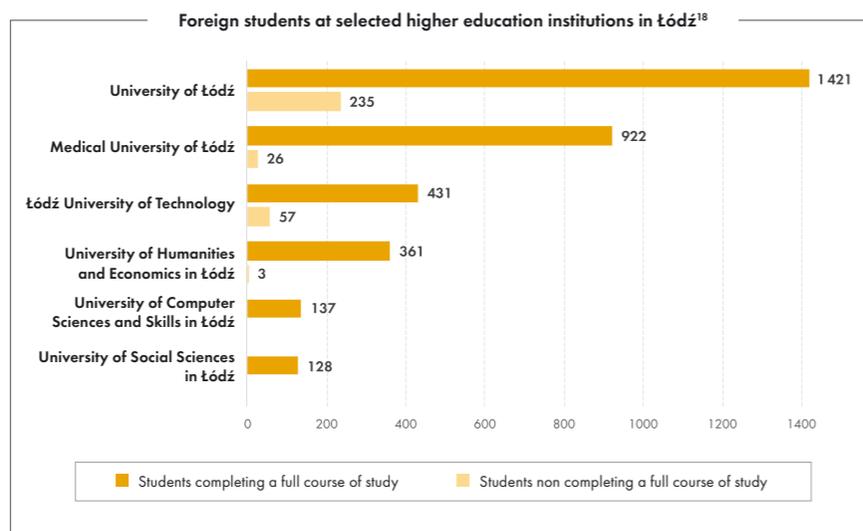
Universities in Łódź also offer education in foreign languages in many fields. That the offer has: University of Lodz, Łódź University of Technology, Medical University and University of Social Sciences in Łódź, in cooperation with Clark University. In total there were over 30 majors courses conducted in different languages in a year academic 2018/2019, both 1st and 2nd degree education. Examples of areas in which students can study in languages foreigners are: humanities, sciences social sciences, natural sciences, medical and technical sciences.

Foreign students

The number of foreigners studying at higher education institutions in Łódź is 6 200. During classes they communicate in English and Polish. The majority of them are not native speakers of these languages.¹⁷

The highest number of foreign students was observed for the following fields of study: management and administration – 1 180 persons, and medical fields of study – 1 160 persons.

Foreign students



¹⁶ Statistical Office in Łódź, 15.10.2019.

¹⁷ Data from the Statistics Poland. As of December 2018.

¹⁸ Data from the Statistics Poland. As of December 2018.

The business perspective

Grzegorz Trzciniński

TECHNOLOGY BUSINESS DEVELOPMENT
MANAGER ŁÓDŹ SITE
ATOS POLAND GLOBAL SERVICES

Łódź, with its strong academic base, is able to deliver to potential investors a wide selection of highly educated employees of varied specialisations.

The dynamic business environment, together with various urban revitalisation projects, has a positive impact on the city's image among global investors as a potential location of their high-tech investments.

The city's location in the very centre of the country, at the crossroads of the main communication routes (including the main motorways, the future Solidarity Transport Hub and the high-speed railway routes) makes Łódź an excellent candidate for a HUB that serves as a communication point not only for Poland, but for the entire Central and Eastern Europe.

It is a potential turning point on the route of the biggest investment of the 21st century supported by the People's Republic of China, that is the new Silk Road joining the Asian market and the Western European markets.

The main factors that make investing in Łódź attractive are: the research and academic base, city's location in the very heart of Poland, a wide access to interesting retail and business real properties, the city's support for creative industries and the history and spirit of the city as place of entrepreneurship and modernisation.

3.03

Cooperation between business and academia

Closer cooperation between universities and entrepreneurs has been becoming increasingly important for the economic development nowadays. Thanks to such cooperation, companies gain access to high-class qualified specialists, while higher education institutions can improve their educational programmes with additional funds, conduct research together with practitioners or commercialise research results. **In Łódź, the cooperation between higher education institutions and companies is becoming more and more popular.**

The University of Łódź has established long-term strategic cooperation with selected national and international partners. Cooperation agreements with companies, public sector institutions and other organisations are usually concluded for a period of three years, with possibility of extension. Building and maintaining strong relations with the surrounding environment is an essential part of building the International Cooperation Strategy of the University of Łódź. Currently, the University of Łódź actively cooperates with such companies as: B/S/H, Ceri, Fujitsu, Infosys, KGHM, mBank, Helion, Philips, PWC, Santander. More than 1,000 companies and institutions cooperate with the University of Łódź in the field of didactics, research and support of employee recruitment processes.

Companies interested in closer cooperation in a specific field may establish relations with the Business Councils operating in all faculties of the University of Łódź. The Business Councils' goal is to develop modern educational curricula that take into account the adjustment of educational fields to the needs and expectations of both domestic and foreign employers. The Business Councils also enable initiating joint innovative research

projects and building start-ups, spin-outs and spin-offs in the field of research studies carried out at the university.

Industrial Doctoral Programmes [in Polish: Doktoraty wdrożeniowe] carried out at the University of Łódź with the participation of specialised scientists generate not only knowledge, but also patents. The dual nature of the PhD programme requires the support of a doctoral supervisor holding an academic title. The second important element is the involvement of the project partner, which may be a company or other entity operating in the social and economic environment. A prerequisite is to maintain full employment of doctoral students during the entire Industrial Doctoral Programme.

Higher education institutions carry out numerous activities aimed at the professional development of their students and the acquisition of practical skills, in which the enterprises are strongly involved. Such activities include: career fairs, training courses at the Competence Academy [in Polish: Akademia Kompetencji], activities aimed at fostering entrepreneurial mind-sets, organisation of and placement in internships and apprenticeships.

Also individual faculties of the Łódź University of Technology cooperate in the field of adjusting academic programmes, equipping laboratories, offering internship opportunities for students or implementing projects commissioned by, among others, the following business partners: Airbus Helicopters, PGE Górnictwo i Energetyka Konwencjonalna S.A. (PGE GiEK S.A.), ANWIL, Filter Servis, +H2O, SKANSKA S.A., Infosys Poland, BSH Sprzęt Gospodarstwa Domowego [BSH Home Appliances], Henkel Polska, Mars Polska.

Moreover, the Łódź University of Technology and the Medical University of Łódź organise one of the largest career fairs in Poland – the Academic Job Fair.

One of the activities the Medical University of Łódź got involved in, in partnership with employers, is the launch of a unique field of study titled: Coordinated Elderly Care. In addition, the Medical University of Łódź implements the following projects (in cooperation with employers): “Studia z POWERem” [Studying with POWER] and “Studujesz Pracujesz” [Studying and Working]. The Medical University of Łódź cooperates with the following companies: AllMed, Almed+, Centralny Szpital Kliniczny Uniwersytetu Medycznego [Central Teaching Hospital of the Medical University of Łódź], TriMedic, Dobry Dietetyk [Good Dietician], Healthy Lifestyle, FALCK, Impuls, MediCenter, Medihad, OLMED, PCM, Samodzielny Szpital Wojewódzki w Piotrkowie Tryb [Independent Provincial Hospital in Piotrków Tribunalski], Sanvita, Szpital Powiatowy w Radomsku [District Hospital in Radomsko], Szpital Specjalistyczny Brzeziny [Specialist Hospital in Brzeziny], Zduńskowolski Szpital Powiatowy [District Hospital in Zduńska Wola], Szpital Zakonu Bonifratrów [Brothers Hospitallers of Saint John of God Hospital in Łódź], Uzdrowiska Kłodzkie [Kłodzko Health Resorts], RTS Widzew, Adamed, Aflofarm, Pelion.

The business perspective

Justyna Piasecka

HR BUSINESS PARTNER, EXTRUDED SOLUTIONS, HYDRO EXTRUSION POLAND

The cooperation with the Łódź University of Technology is of utmost importance to us; this includes conducting internship programmes and organising open days for students. The level of competence of the Łódź University of Technology students is highly rated – they are motivated, goal-oriented and ready to take up independent positions after completing an internship. Graduates of this university find engineering jobs at Hydro Extrusion Poland, e.g. as process technicians, specialists in robotics or automation specialists.

In the area of manufacturing job positions in Łódź, as everywhere in Poland, we are in a candidate-driven job market. We are constantly working on solutions that would make our offer more appealing to our candidates. In this situation, we have also opened up to foreign workers – we have been already cooperating on a permanent basis with several dozen people from the East who adjust quickly to the new environment and are of great value to our company.

We also see a need to increase education in the area of varnishing and to gain greater access to employees at every professional level within this area. At this moment, we have decided to recruit varnish experts from among candidates open to relocation.

It is worth noting that our specialists and managers were open to relocation to Łódź and thanks to this, among other things, we were able to implement these projects successfully. We still invite people with experience in the process of industrial varnishing to cooperate with us.

To sum up, the Łódź labour market has a lot of potential. I can obviously see areas that need to be further developed, e.g. infrastructure and public transport, the partnership approach of the city authorities, entrepreneurs and universities lets us look to the future with optimism.

Part 4

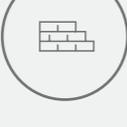
Business in Łódź



4.01 Main business areas

The development of the city has been based on the Regional Development Strategy, which aims at supporting innovation and developing strong cooperation and partnership links between regional authorities and investors.

The key sectors for the Łódź region are mainly those related to the modern textile and fashion industry, as well as advanced construction materials, IT and telecommunications.

Main business areas of the Łódź Province	
Key industry sectors of the Łódź Province	The most development potential industries in the Łódź Province
 Manufacture of domestic appliances	 Modern textile and fashion industry (including design)
 SSC, BPO / ITO, R&D (Shared Business Centers, Business Process Outsourcing Centres/Information Technology Outsourcing Centers, Research & Development Centres)	 Advanced construction materials
 Logistics	 Medicine, pharmaceuticals, cosmetics
 Furniture industry	 Power generation and renewable energy sources
 Electro-mechanical and mechanical industry	 Innovative agriculture and agri-food processing
 Creative industries	 Information and communications technology (ICT)*
 Environmental services	
 Manufacture of building materials, construction chemicals, builders' joinery & carpentry of wood	

4.02 BPO/SSC

The SSC/BPO sector opens new centres located in Łódź every year. In recent years, financial services centres and global competence centres have been particularly remarkable, as they are characterised by greater substantive complexity of job positions and higher strategic importance. Apart from new investments, many of the existing centres decide to reinvest in order to employ more labour force (even a few hundred people every year).

Below are presented new investments in Łódź (list of centres opened in 2015 and descriptions of centres opened in 2016-2019).

SSC/BPO centres opened in Łódź in 2015:

- McCormick Shared Services EMEA Sp. z o.o.
- Barry Callebaut SSC Europe Sp. z o.o.
- UPS Global Business Services Polska Sp. z o.o.
- Flint Group Polska Sp. z o.o.
- Dragon Services Sp. z o.o.
- Solar Polska Sp. z o.o.
- Adaptive Group Sp. z o.o.
- Change of Scandinavia SSC

SSC/BPO centres opened in 2016-2019:

- Signify
- Philips
- Panasonic Electric Works
- BFF Banking Group
- PKP Energetyka Centrum Usług Wspólnych
- Whirlpool EMEA

Below are presented selected investments in the BPO/SSC sector:

Whirlpool EMEA¹⁹

Whirlpool is a US company manufacturing and selling home appliances. The company opened a shared services centre in Łódź in 2017.

Scope of activities of the SSC in Łódź:

Financial operations carried out so far in Delhi, Dublin and Fabriano have been transferred to Łódź. The countries of Europe, Middle East and Africa will be served by the Shared Services Centre. Business processes will be supported in nearly 20 languages.

PKP Energetyka Shared Services Centre²⁰

PKP Energetyka SA provides electric power services. In 2016, the company opened a shared services centre in Łódź.

Scope of activities of the SSC in Łódź:

The Centre supports financial and accounting operations.

Signify (formerly Philips Lighting)

Philips Lighting is the world leader in the lighting industry (in 2018, the company changed its name to Signify on the basis of an amendment to the company's Articles of Association). In 2016, the Company opened a shared services centre (SSC) in Łódź.

Scope of activities of the SSC in Łódź:

Signify (formerly Philips Lighting) Financial Services Centre provides centralised services for all financial and accounting operations (including financial analyses – FP&A); processes are to be supported in various languages.

¹⁹ Source of information: <http://wyborcza.pl/7,155287,22470885,whirlpool-otworzyl-w-lodzi-centrum-uslug-wspolnych-w-branzy.html>; <https://www.radiolodz.pl/posts/39037-praca-i-rozwoj-powstaja-dwa-nowe-lodzkie-centra-finansowe-i-uslug-wspolnych>; <https://lodz.onet.pl/beda-nowe-miejsca-pracy-dwie-firmy-dzis-otworzily-w-lodzi-centra-finansowe-i-uslug/y7b395f>

²⁰ Source of information: <https://uml.lodz.pl/aktualnosci/arttykul/120-nowych-miejsc-pracy-philips-lighting-otworzyl-centrum-uslug-finansowych-w-lodzi-id19225/2018/3/27/>; <https://www.proper-tynews.pl/biura/philips-lighting-uruchomil-biuro-w-lodzi,62738.html>; <https://www.signify.com/pl-pl/our-company/news/press-release-archive/2018/20180327-philips-lighting-oficjalnie-otworzyl-centrum-uslug-finansowych-w-symetris-business-park-w-lodzi>

BFF Banking Group²¹

BFF Banking Group is the leading financial services provider to suppliers of the European Healthcare and Public Administration sectors listed on the Milan Stock Exchange. In 2016, the company opened an outsourcing centre in Łódź.

Scope of activities of the BPO in Łódź:

The outsourcing centre will handle financial processes for European countries.

Panasonic Electric Works²²

Panasonic Electric Works manufactures and distributes electronic components. In 2018, the company opened its headquarters in Łódź; part of its activities is focused on the centralisation of business services.

Scope of activities of the SSC in Łódź:

The Panasonic Electric Works Business Services Centre will provide technical support for European customers.

Philips Global Competence Center²³

Philips is a Dutch producer of consumer electronics, and the following companies belong to the Group: Philips Consumer Lifestyle, Philips Lighting (currently Signify), Philips Healthcare.

In 2016, the Global Competence Centre handling processes for Philips Healthcare was opened in Łódź.

Scope of activities of the SSC in Łódź:

The Philips Global Competence Centre provides support for financial processes, manages medical equipment purchasing and supply processes, and offers solutions destined to improve the functioning of healthcare sector entities. The centre handles medical equipment orders from countries in Europe, the Middle East and Africa. One of the key tasks is to coordinate the process: from ordering the device to its installation, and to ensure the high quality of equipment preparation. Philips SSC employs specialists in logistics, accounting, finance, order processing, purchasing processes, HR, as well as team and project managers.

4.03

IT

In the last few years, Łódź has been becoming more and more visible on the map of Poland as regards the development of ICT services.

In the years 2015-2018, many IT companies chose Łódź for the development of their R&D centres, given the presence of highly qualified personnel and graduates of technical universities. The following companies opened their R&D centres in Łódź: TOMTOM, Harman, Ericsson, Fujitsu, ZF Group. Other new investments can be characterised by offering business applications support and development services mainly to international customers. There are relatively few new IT companies offering IT infrastructure maintenance and development services, as well as IT service desk and helpdesk services (including: Athos, Fujitsu, Infosys).

Companies with a well-established market position have declared the Łódź job market predictions as very optimistic. These companies plan to reinvest and significantly expand their IT teams. Among these companies, there is Fujitsu (planning to open approximately 500 new vacancies), ZF (200) TomTom (150), GFT (planning to open approximately 200 vacancies) and Accenture, GFT, Atos, Cybercom, Sii, Ericsson, Transition Technologies, and Harman planning to open from 50 to 100 new vacancies.

Below are presented several **selected investors from the ICT industry:**

GFT Poland

Nature of business activity in Łódź:

software house, customer care

Country of origin: Germany.

GFT was established in Germany as a small company operating in the financial sector. Since 2001, it has become a pioneer of nearshoring services with a global team of approximately 5,000 employees in 13 countries. GFT Poland comprises three offices located in Łódź, Poznań and Warsaw. The company deals with the development of systems and applications for investment banks mainly in Java and JavaScript.

The most commonly used technologies:

Java, JavaScript, C#.

Harman Connected Services Poland

Nature of business activity in Łódź:

R&D, software house, customer care

Country of origin: Korea

The company has been present on the Łódź market since 2018; it is 100% owned by Samsung Electronics Co Ltd. The company operates in the automotive market and takes part in the development of advanced solutions for the automotive industry,

such as the in-vehicle sound platform, award winner in the "TU-Automotive Awards 2017" competition; a complete, end-to-end cloud platform (the HARMAN Ignite Platform); HARMAN OTA software management system; navigation systems or the most modern in-vehicle infotainment system, created for the new Mercedes-Benz A-Class. The company has been issued more than 7,000 patents and has been awarded around 60 audio design awards.

The most commonly used technologies:

Java, C, C++.

Fujitsu Technology Solutions Global Delivery Center

Nature of business activity in Łódź:

R&D, software house, BPO, customer care.

Country of origin: Japan.

Global Delivery Center in Łódź is 100% owned by the Japanese Fujitsu Ltd and runs its business in the broadly understood ICT technologies aimed at creating comprehensive IT solutions to make people's lives easier. The R&D Centre in Łódź takes part in the creation of solutions in the field of IOT, AI, security, cloud computing security, domain management and IT infrastructure.

The most commonly used technologies:

C/C++, Python, Java.

²¹ Source of information: <https://www.pb.pl/wloska-grupa-bff-stawia-na-lodz-932655>; <https://dzienniklodzki.pl/bff-banking-group-rozwiija-w-lodzi-centrum-outsourcingowe-i-szuka-pracownikow/ar/13272388>; <https://mlozdiwlodzi.pl/tag/bff-banking-group/>; <https://www.radiolodz.pl/posts/45174-miedzynarodowy-lider-bankowosci-bff-banking-group-wiaze-przyszlosc-z-lodz>; <https://mlozdiwlodzi.pl/pracodawcy/philips/>; <https://evertiq.pl/news/21095>; <https://lodz.wyborcza.pl/lodz/7,35136,24801718,praca-w-lodzi-wielkie-zatrudnienie-w-philipsie-firma-przenosi.html>

²² Source of information: <https://uml.lodz.pl/aktualnosci/artikul/biuro-panasonic-electric-works-polska-przenosi-sie-z-warszawy-do-lodzi-id18492/2018/2/21/>

²³ Source of information: <http://www.rynekzdrowia.pl/Aparatura-i-wyposazenie/Lodz-otwarto-Globalne-Centrum-Kompetencyjne-Philips,181274,5.html>; <https://www.philips.pl/a-w/about/news/archive/standard/news/press/2018/20180213-otwarcie-globalnego-centrum-kompetencyjnego-philips-oraz-centrum-referencyjnego-w-icomp-w-lodzi.html>; <https://innpoland.pl/141335,philips-otworzy-l-lodzi-globalne-centrum-kompetencyjne-trzeci-na-swiecie>; <http://centrumprasowe.pap.pl/cp/pl/news/info/114493,38,lodz-i-innowacyjne-technologie-otwarto-globalne-centrum-kompetencyjne-philips>; <https://mlozdiwlodzi.pl/pracodawcy/philips/>; <https://evertiq.pl/news/21095>; <https://lodz.wyborcza.pl/lodz/7,35136,24801718,praca-w-lodzi-wielkie-zatrudnienie-w-philipsie-firma-przenosi.html>

Ericsson

Nature of activity:

R&D activity, software company providing services of application development for other clients.

Country of origin: Sweden.

Ericsson came to Łódź through acquisition of Ericpol Sp. z o.o. in 2016. At present it is a leading company on the Polish market as regards preparation for implementation of 5G technology. It cooperates with higher education institutions and operators, and it supports local start-ups in popularising 5G solutions. Ericsson operations in Poland considerably contribute to the development of global ICT solutions. The company employees in Cracow and Łódź work on software for wireless access that is in use throughout the world. Ericsson pursues also projects outside the telecommunications area. It is one of the biggest companies in Poland in the ICT industry. Poland has become the second largest Ericsson research and development centre globally. At present, in its main locations in Poland the company employs 2 300 persons.

The most commonly used technologies:

C++, Java, Python.

ZF Group

Nature of activity: R&D.

Country of origin: Germany.

ZF Friedrichshafen AG is a global technological company that provides solutions for passenger cars, commercial and industrial vehicles, thus supporting new generation mobility.

Its Łódź Engineering Centre is an extension of the Engineering Centre in Częstochowa. It conducts research and development activity as regards designing and testing active safety systems. These solutions are aimed at preventing dangerous road incidents and at helping the driver in making decisions. The Engineering Centres develop vision and radar systems dedicated for both passenger and special purpose vehicles, and they cooperate with leading car manufacturers worldwide.

Accenture Advanced Technology Center Poland

Nature of activity:

software company, IT consulting

Country of origin: Ireland.

Accenture in Łódź delivers IT end-to-end services. The type of services it offers ranges from individual solutions to support specialised business functions, to complex services of technological consulting and system integration. The company applies ground-breaking technologies to create and implement complex projects that change the business of its Clients.

Digital Teammates

Nature of activity:

software company, IT consulting.

Country of origin: Poland.

Digital Teammates is a fast-growing company that deals solely with RPA (Robotic Process Automation) technologies. It combines the most advanced RPA tools with swift continuous integration and delivery processes to deliver tangible results in a very

short time (measured rather in weeks than in months), based on the in-depth knowledge of software engineering and optimisation of business processes.

4.04

Industrial production

Industrial production is one the fastest developing business industries. Below we present new investments launched during the last 3 years.

Goldbeck Elementy Polska Sp. z o.o.

Industry: Production of steel structures for the construction industry.

Capital – country of origin: Germany.

It is a family company, at the moment managed by the second generation. The company designs, constructs and provides related services as regards structures for various types of buildings (industrial facilities, office buildings, multi-floor car parks, logistic centres, shopping centres, cold storage facilities). The components for the structures are manufactured by the company on its own. It has in total 9 production facilities in Europe and 2 system centres. Since the company has a wide scope of activity, it offers job opportunities for persons with experience in both construction (e.g. construction site managers, construction engineers, construction-related workers) as well as in production (production employees, shift managers, production managers). The company's new production facility was officially opened on 11 October 2018 in Łučník near Zgierz.

Intap Sp. z o.o.

Industry: Production of car seats.

Capital – country of origin: Poland.

An organisation with Polish capital, manufacturer of high-quality car seats for buses, minibuses and special purpose vehicles (medical services, police, fire brigades).

The company has been present on the Polish market since 1980 but it is its first investment of this type in the Łódź region and in cooperation with the Łódź Economic Zone, consisting in the construction of an entirely new production facility – by 2021 the company plans to employ 180 persons and to maintain this level until 2026. Its recruitment activities focus on qualified production employees (profiles: turner – milling machine operator, machine operator, welder, shoemaker/seamstress).

KOKI Europe Sp. z o.o.

Industry: Production of soldering materials.

Capital – country of origin: Japan.

One of the world leaders in providing soldering materials, with focus on research and development in engineering to deliver new generation solutions, i.e. halogen-free absorbing fluids and soldering alloys of low melting temperature. The company started production and distribution operations in the Łódź region in 2019. It keeps actively expanding its structure, and increasing the level of employment. Creating its organisation from the scratch, it seeks specialists and managers of various types on the Łódź labour market.

LS Bedding Polska Sp. z o.o.

Industry: Production of bedding products (modern technology).

Capital – country of origin: Belgium.

A Belgian organisation that designs and manufactures modern and technologically advanced bedding solutions. Its portfolio includes bedding components that are designed with the highest precision – bedding chests, bed frames, mattresses, covering, sheeting products, bedside tables. The products are customised, in response to the new market trends, and prepared in accordance with the company mission based on the belief that quality sleep is crucial for our comfort of living. This advanced technology allows to apply solutions that are adjusted to individual body sleep positions. The company seeks creative employees who are experienced in new technologies connected with engineering and design.

Miele Technika Sp. z o.o.

Industry:

Production of household appliances.

Capital – country of origin: Germany.

It is a family company, at present led by the fourth generation. It produces household appliances with the use of modern technologies in the premium segment (washing machines, refrigerators, coffee machines, dishwashers, ovens).

In 2017 it decided to build a new facility in Ksawerów Łódzki where it will produce washing machines with the use of a technology that it has not used in any other location. The majority of appliances will be for export, but the management of Miele is confident that Poland has considerable potential. The production line will be launched in full in 2020 and then the company will announce its further development plans in the Łódź region. Now, the company is focused on building its basic human resources structure in order to be fully prepared to respond to the production challenges.

Yamada Wentworth Development Sp. z o.o.

Industry: Production of packaging and processing of synthetic materials.

Capital – country of origin: Japan (74%) i Canada (26%).

One of the main players on the international market as regards equipment for production of packaging and processing of synthetic materials. The company specialises in designing and production of blown forms, injection blown moulding, injection single- and multi-component forms. It manufactures various special purpose tools, such as punching dies and press tools, and it mechanically processes various types of detailed elements, including for the aviation industry. The newly built production facility specialises in production of shaving machines, household products and toiletries made of synthetic materials. The company started its operations in August 2018.

Nippon Seiki Poland Sp. z o.o.

Industry: Production of head-up displays (HUD).

Capital – country of origin: Japan.

The Nippon Seiki Group is a sub-supplier of automotive premium brands, i.e. Porsche, BMW, Daimler, Audi, Jaguar, Land Rover, and a manufacturer of displays and measurement equipment for construction machines, LCD/OLED displays, sensors and electronic components for remote controllers or panels used in industry and in households. The company has its branches in 12 countries, and employs in total 15,000 persons. In the Łódź region it will build a new production facility to manufacture high-tech head-up displays (transparent displays that show information in the line of the driver's sight) and the Instrument Cluster used in cars and motorcycles. The full production line is to be launched by 2023. In May 2016 the company set up its design office in Gdańsk where it employs engineers responsible for specification, design, creation and testing of software for dashboard information systems. Those specialists and future employees of the production facility will have the opportunity to work with automotive centres from all around the world, including directly with manufacturers.

Stalatube Sp. z o.o.

Industry: Manufacturer of advanced components made of stainless steel.

Capital – country of origin: Finland.

Stalatube is a recognised international brand that manufactures advanced closed profiles and other elements made of stainless

steel – the company can boast with the largest assortment of square and rectangular products worldwide. For 45 years the company has built its international market power by making a stand on such markets as the United States, Holland and India. The investment in Łódź, together with the changes in the company's main office in Finland, is planned to boost the company's competitive position through increasing its efficiency, shortening the delivery time and a closer contact with European markets in particular.

There are plans that an international organisation, PMP Group, is to implement investments in the Łódź region. The organisation is a global manufacturer of paper-making machines with American and Polish capital, operating on the global market for 160 years.

Łódź is also a place where numerous reinvestment projects are located, especially as regards the companies which have successfully developed their operations in this region, boosting their prestige and market position. Throughout the recent years there have been two that seem most important – the B&R centre of BSH and the extension of production facilities by Whirlpool. Both those cases have been described in the section about key players in the production industry.

The business perspective

Michał Bielawski

MANAGING PARTNER/GROUP CFO,
ADAPTIVE SOLUTIONS & ADVISORY GROUP

Łódź is the so-called “second-tier” city, i.e. the city of second choice for investors in the sector of modern business services. Given the above, and despite the fact that the SSC/BPO/ITO sector is very well-developed in Poland and despite a relatively strong representation of companies from this sector in Łódź, there is still quite a big potential for further growth. We have noticed a positive role played by the city authorities in promoting Łódź as a place for new investments. This has been demonstrated by the pro-active approach of the city authorities at different trade events, as well as the sector's own assessment of the quality of cooperation. Over the last few years, Łódź has been repeatedly ranked as the best or second-best city in terms of cooperation with local authorities and local universities – cf. ABSL 2018 and 2019 reports.

A large number of students, especially those majoring in economics, linguistics and technical studies, are essential for the development of the sector. Łódź has become a trendy place to work and live in, not only for people from other parts of Poland, but also for people from other countries. The unique character of Łódź as an “avant-garde” city makes it more attractive when compared to other major centres of the modern business services sector in Poland (Warsaw, Kraków, Wrocław). Employees appreciate this unique atmosphere, the city structure, its urban space and architectural originality, which is reflected, for example, in the creation of office spaces in revitalised post-industrial buildings. This situation makes it quite easy to find new candidates for jobs in such refurbished business centres.

The maturity and diversity of the Łódź market is quite an asset. The percentage share of investors of various sizes is evenly distributed: we have companies employing approx. 2,000 people; other which employ several hundred people and also smaller organisations. The vast majority of these companies have been developing in recent years and have declared further growth. The labour market in Łódź and the labour costs is a supplementary trump card to choose this city. Despite the proximity to Warsaw, salaries in Łódź are significantly lower than in other urban centres, which is also due to lower cost of living in Łódź.

The cooperation with BPO, SSC and ITO centres in Łódź shows that the services provided by business centres in Łódź are very diverse and often very advanced; these centres provide excellent career prospects for their employees, as well as long-term and interesting job positions. The specificity of Łódź as far as the type of investors is concerned are the BPO and IT companies.

As BPO companies provide multiple services to numerous clients, they offer a wide variety of career opportunities to their employees. IT companies located in Łódź can range from world leaders to smaller, but innovative companies: working in such companies is very interesting, and offers competence development and career opportunities.

All in all, I believe that Łódź is an ideal place for the investors' further development and a good place for new investments in the BPO/SSC/ITO sector, looking for committed employees with great knowledge, skills and abilities.

Part 5

36 SSC/BPO



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5.01

Introduction

Łódź is one of Poland's leading cities in the context of employment in the SSC/BPO sector. It stems from several factors which determine the business attractiveness of the city. The most important factor is the availability of a wide range of qualified specialists in the Łódź labour market. As the offer of local higher education centres is rich, the Łódź labour market is full of young people with numerous competencies, including language skills, who are ready to take up jobs in international structures.

In addition, many business services centres decide to expand the scope of their activities and transfer new processes to the Łódź market. Thanks to this, Łódź offers opportunities for development not only to young people ready to enter the job market, but also to highly qualified specialists from various areas of expertise. This is also possible due to the increasingly frequent implementation of robotic process automation.

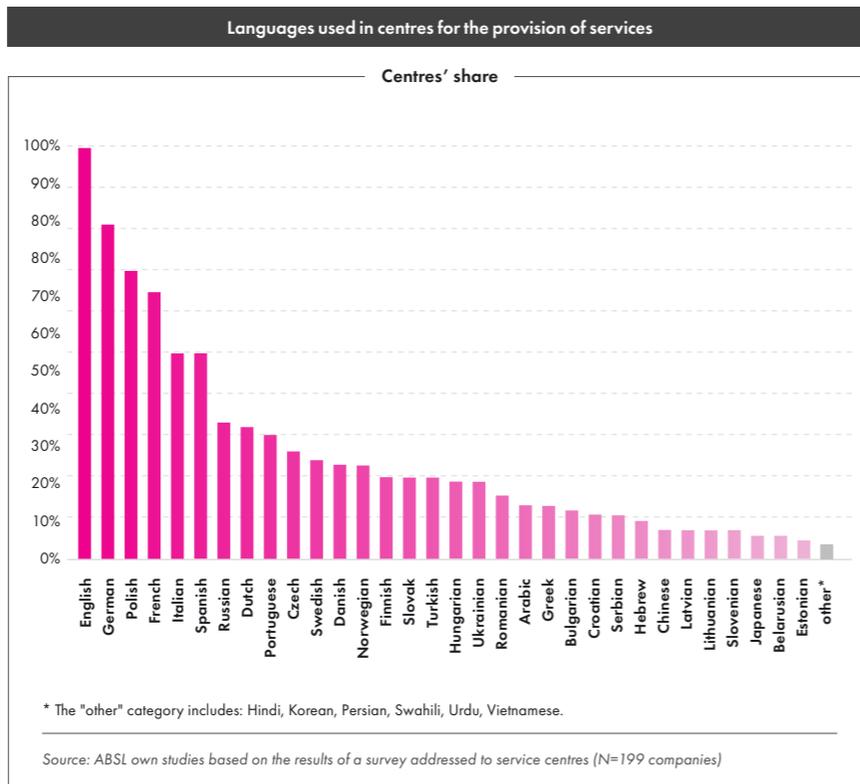
Lately, one could also observe the development of Łódź through the eyes of incoming and returning specialists, e.g. from Warsaw, which is one of the leading cities in terms of career opportunities offered to employees from the SSC/BPO sector.

The list of the main investors owning business services centres located in Łódź is presented on next page.

The list of the main investors owning business services centres located in Łódź	
Company name	Country of origin / capital / headquarters
ABB	Switzerland and Sweden, current location: Switzerland
Adaptive Group Sp. z o.o.	Poland
Amcor Flexibles Reflex Sp. z o. o.	Australia, current headquarters: United Kingdom
Arvato Supply Chain Solutions	Germany
Atos Sp. z o.o.	France
Barry Callebaut SSC Europe Sp. z o.o.	Countries of origin: France and Belgium, current headquarters: Switzerland
Beso Lux	Current headquarters: Luxembourg
BFF Banking Group	Italy
BSH	Germany
Business Support Solution SA	Poland
Capita plc. (dawniej SouthWestern BPS Poland Sp z o.o.)	United Kingdom
CERI International Sp. z o.o.	Country of origin: Poland, current capital: German
Change of Scandinavia	Denmark
Clariant Services (Poland) Sp. z o.o.	Switzerland
Conduent (dawniej: Xerox i ACS Solutions Poland Sp. z o.o.)	United States
DHL	Germany
Dragon Services Sp. z o.o.	Poland
DXC Technology	United States
EY (Ernst&Young)	United Kingdom
Flex	United States
Flint Group Polska Sp. z o.o.	United States, current headquarters: Luxembourg
Fujitsu Global Delivery Center	Japan
General Electric Power Controls	United States
GFT Poland Sp. z o.o.	Germany
Infosys Poland Sp. z o.o.	India
Lumileds Poland SA	Current headquarters: Holland
McCormick Shared Services EMEA Sp. z o.o.	United States
Nordea Operations Centre	Finland
Panasonic Electric Works Sp. z o.o.	Germany
Philips Globalne Centrum Kompetencyjne	Holland
PKP Energetyka Centrum Usług Wspólnych Sp. z o.o.	Country of origin: Poland, current capital: Luxembourgish
Recticel Sp. z o.o.	Belgium
Sanitec (part of Geberit Group)	Switzerland (Geberit Group – current owner of Sanitec)
Signify (dawniej: Philips Lighting)	Holland
Solar Polska Sp. z o.o.	Poland
Solenis	United States
Takeda SCE Sp. z o.o.	Japan
Tate & Lyle Shared Services Sp. z o.o.	United Kingdom
TIP Trailer Services Poland	Holland
TomTom Polska Sp. z o.o.	Holland
UniCredit Services	Italy
UPS Global Business Services Polska Sp. z o.o.	United States
Veolia Centrum Usług Wspólnych	France
Voice Contact Center Sp. z o.o.	Poland
Whirlpool EMEA	United States

Foreign languages in which companies from the SSC/BPO sector support business processes.

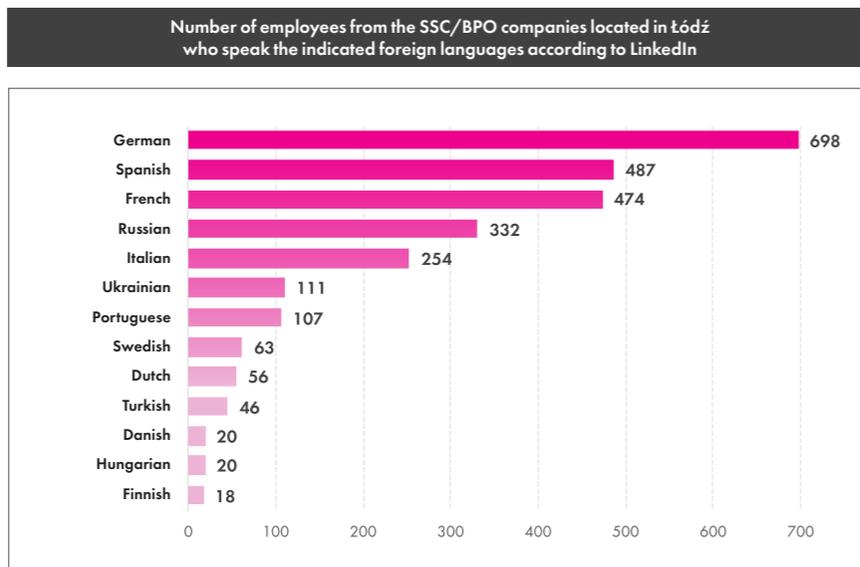
We have reliable statistics showing a list of nearly 200 companies with the complete information on foreign languages used in a given centre nationwide, based on ABSL report.



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Based on the analysis of LinkedIn data, the SSC/BPO employees (N = 11 353) were broken down by foreign languages in which the business processes in the BSS centres located in the Łódź agglomeration are most frequently supported (excluding English and Polish).

Language skills at a minimum *limited working level* were taken into account.



5.02 Profiles of leading employers in the BPO/SSC sector

Among the centres of the modern business services sector located in Łódź, it is worth mentioning the key employers whose business profiles have been described below.

Profiles of leading employers in the BPO/SSC sector		
Company name	Basic information	Business processes ²⁴ in SSC in Łódź
Tate & Lyle Shared Services Sp. z o.o.	Tate & Lyle PLC is a British-headquartered, global supplier of food and beverage ingredients to industrial markets. It was originally a sugar refining business, but from the 1970s began to diversify, eventually divesting its sugar business in 2012. It specialises in turning raw materials such as corn and tapioca into ingredients that add taste, texture, and nutrients to food and beverages.	Finance & Accountancy (AP, GL, AR, Finance Analysis), Procurement
McCormick Shared Services EMEA Sp. z o.o.	McCormick is a global leader in flavour. With more than 11 000 employees around the world and \$4.8 billion in annual sales, we manufacture, market and distribute spices, seasoning mixes, condiments and other flavourful products to the entire food industry, retail outlets, food manufactures and food service businesses. The company has facilities in more than 50 locations in 27 countries.	Finance & Accountancy (AR, AP, GL), Procurement, HR, CS, Food Technical
Clariant Services (Poland) Sp. z o.o.	Clariant AG is a Swiss speciality chemicals company, formed in 1995 as a spin-off from Sandoz. The company is focused on four business areas: care chemicals (consumer and industrial); catalysis; natural resources (oil & mining, minerals); and plastics & coatings. Headquartered near Basel, Switzerland, the public company encompasses 110 operating companies in 53 countries.	Finance & Accountancy (AR, AP), HR, Procurement, Logistics
Fujitsu Global Delivery Center	Fujitsu delivers total solutions in the field of information and communication technology. Along with multifaceted services provision, our comprehensive business encompasses the development, manufacture, sales and maintenance of the cutting-edge, high-quality products and electronic devices that make these services possible.	Finance & Accountancy (Controlling, GL, AP, AR), CS, IT Operations
Infosys Poland Sp. z o.o.	Infosys Poland is a leading provider of outsourcing, consulting and technology services and one of Poland's largest employers in service sector. The company is the largest subsidiary of Infosys Limited outside India – a global provider of integrated business and technology consulting, outsourcing and IT services and a giant in the international market of modern business services.	Finance & Accountancy (AR, AP, GL), Master Data Management, Procurement, HR
Barry Callebaut SSC Europe Sp. z o.o.	Barry Callebaut is among the world's largest cocoa producers and grinders, with an average annual production of 1,7 million tonnes of cocoa. It was created in 1996 through the merging of the Belgian chocolate producer Callebaut and the French company Cacao Barry. It is currently based in Zürich, Switzerland, and operates in over 30 countries worldwide.	Finance & Accountancy (AR, AP, GL), Master Data, HR, Logistics, CS

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Profiles of leading employers in the BPO/SSC sector

Company name	Basic information	Business processes ²⁴ in SSC in Łódź
Takeda SCE Sp. z o.o.	Takeda is a global innovative pharmaceutical company committed to improving the health and quality of life of patients around the world through the provision of innovative medicines. The company's core business includes oncology, gastroenterology, central nervous system diseases and vaccines. The company in Poland comprises 2 branches operating in 3 areas and a total of over 900 employees.	Finance & Accountancy (AP, AR, GL, Controlling), Master Data Management, Procurement
Whirlpool EMEA	Whirlpool Corporation (NYSE: WHR) is the world's leading major home appliance company, with approximately \$21 billion in annual sales, 92 000 employees and 65 manufacturing and technology research centres in 2018.	Finance & Accountancy (AR, AP, GL, Controlling), HR, Master Data Management, Procurement, Logistics
UPS Global Business Services Polska Sp. z o.o.	Founded in 1907 as a messenger company in the United States, UPS has grown into a multi-billion-dollar corporation by clearly focusing on the goal of enabling commerce around the globe. Today, UPS is a global company with one of the most recognized and admired brands in the world. The company has become the world's largest package delivery company and a leading global provider of specialized transportation and logistics services.	Finance & Accountancy (AP, Logistics, CS)
Conduent (dawniej: Xerox i ACS Solutions Poland Sp. z o.o.)	Conduent helps to transform the business by managing mission-critical interactions at massive scale. The company leverages technology-driven platforms to modernize experiences and make them more efficient, seamless and satisfying.	Finance & Accountancy (Controlling, AP, AR), CS, HR
Capita plc (dawniej: SouthWestern BPS Poland Sp. z o.o.)	Capita is a consulting, digital services and software business, delivering innovative solutions and simplifying the links between businesses and customers, governments and citizens.	Finance & Accountancy (AP, AR), CS
Nordea Operations Centre	Nordea is the largest financial services group in the Nordic region and one of the biggest banks in Europe. Nordea operates across both the Nordic and Baltic regions with over 1,400 branches. The bank is present in 20 countries around the world, operating through full-service branches, subsidiaries and representative offices, although it primarily provides services in Finland, Norway, Denmark, Sweden, Estonia, Latvia and Lithuania.	Finance & Accountancy (GL), Controlling Procurement, Business Analysis, AML, KYC, IT
Lumileds Poland SA	As the inventor of Xenon technology, a pioneer in halogen lighting and the leader in high performance LEDs, Lumileds builds innovation into everything it does. What's more, quality and reliability are guiding principles for Lumileds. The company demonstrates this by maintaining control over materials, processes and technologies and by helping customers engineer the best quality of light for their application to achieve the highest levels of performance.	Finance & Accountancy (GL, AP, AR, Controlling), Procurement, Data Management, CS

Profiles of leading employers in the BPO/SSC sector

Company name	Basic information	Business processes ²⁴ in SSC in Łódź
Solenis	Solenis, formerly Ashland Water Technologies, is an American manufacturer of specialty chemicals for the pulp, paper, oil and gas, chemical processing, mining, biorefining, power and municipal markets. Headquartered in Wilmington, Delaware, in the United States, the company operates 30 manufacturing facilities located around the globe. Its product portfolio includes a variety of process, functional and water treatment chemistries, as well as monitoring and control systems.	Finance & Accountancy (GL, AR)
PKP Energetyka Centrum Usług Wspólnych [PKP Energetyka Shared Services Centre] Sp. z o.o.	PKP Energetyka has been operating on the Polish market since 2001. Our main task is to sell and deliver electricity to traction units and business customers. We also specialise in power engineering services. The owner of PKP Energetyka, CVC Capital Partners, is one of the largest investment funds in the world.	Finance & Accountancy (GL, AR, AP)
Flint Group Polska Sp. z o.o.	Flint Group, one of the largest suppliers to the printing and packaging industry worldwide, was created by the union of XSYS Print Solutions and Flint Ink Corporation in late 2005.	Finance & Accountancy (GL, AR, AP, Financial Analysis, Controlling). CS, HR
Amcor Flexibles Reflex Sp. z o.o.	Amcor plc is a global packaging company. It develops and produces flexible packaging, rigid containers, specialty cartons, closures and services for food, beverage, pharmaceutical, medical-device, home and personal-care, and other products. Amcor is listed on the Australian Securities Exchange (ASX: AMC) and has its head office in Warmley, Bristol, United Kingdom.	Finance & Accountancy (GL, Controlling, Finance Analysis), CS, Procurement, Logistics
Business Support Solution SA	BSS SA provides services for over 250 entities from the manufacturing, service and commercial sectors, including retail chains. BSS clients include issuers listed on the WSE and NewConnect market.	Finance & Accountancy
DXC Technology	DXC Technology (NYSE: DXC) is a global IT services company that leads digital transformations for clients by managing and modernizing mission-critical systems, integrating them with new digital solutions to produce better business outcomes. Our global reach and talent, innovation platforms, technology independence and extensive partner network enable 6 000 private and public-sector clients in 70 countries to thrive on change. DXC is a recognized leader in corporate responsibility.	Finance & Accountancy (AP, AR, GL, Finance Analysis), CS, IT, HR
General Electric Power Controls	GE is an American multinational conglomerate incorporated in New York City and headquartered in Boston. As of 2018, the company operates through the following segments: aviation, healthcare, power, renewable energy, digital industry, additive manufacturing, venture capital and finance, lighting, and oil and gas.	Finance & Accountancy (Financial Analysis, Controlling, GL)

Profiles of leading employers in the BPO/SSC sector

Company name	Basic information	Business processes ²⁴ in SSC in Łódź
Signify (formerly: Philips Lighting)	Signify is the new company name of Philips Lighting. The company is the world leader in lighting and provide our customers with high-quality, energy-efficient lighting products, systems and services. They turn light sources into points of data to connect more devices, places and people through light, contributing to a safer, more productive and smarter world.	Finance & Accountancy (AR, AP, GL), CS, Procurement
BSH	BSH is the largest manufacturer of home appliances in Europe and one of the leading companies in the sector worldwide. The group stemmed from a joint venture set up in 1967 between Robert Bosch GmbH (Stuttgart) and Siemens AG (Munich) and posted annual sales of 13,4[1] billion euros in the year 2018.	Finance & Accountancy (AP), Procurement, Master Data
CERI International Sp. z o.o.	CERI was established in 2003 as one of the first companies to provide business process outsourcing services in Poland. However, our history dates back to 1996, when we started operations as BRE Bank's processing centre. Since March 2012, the second largest German bank, Commerzbank AG, has been the sole holder of 100 per cent of CERI's shares.	Finance & Accountancy (Controlling), KYC, HR, IT Admin
ABB	ABB is a global leader in power and automation technologies. The company has been operating since 1883.	Finance & Accountancy (Controlling, Finance Analysis), Procurement, IT
Philips Polska Global Competence Centre	Royal Philips is a leading health technology company focused on improving people's health and enabling better outcomes across the health continuum from healthy living and prevention, to diagnosis, treatment and home care. Philips leverages advanced technology and deep clinical and consumer insights to deliver integrated solutions. Headquartered in the Netherlands, the company is a leader in diagnostic imaging, image-guided therapy, patient monitoring and health informatics, as well as in consumer health and home care. Philips generated 2018 sales of EUR 18.1 billion and employs approximately 78 000 employees with sales and services in more than 100 countries.	Finance & Accountancy (AP, AR, FP&A), Procurement & Logistics, CS, HR

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²⁴ In the names of business processes, the terms describing business processes were used with the following meaning and scope:

- *GL – refers to processes: General Ledger, RfR, Fixed Assets, Intercompany
- *AR – refers to processes: Accounts Receivables, OIC, Billing, Credit Management, Collections
- *AP – refers to processes: Accounts Payable, PIP, Payments
- *CS – refers to processes: Customer Service, Service Desk, Helpdesk, Customer Care, Customer Advisory

5.03

Employment and salaries in the SSC/BPO sector

Employment in the SSC/BPO sector has been steadily rising nationwide every year. In terms of current employment, Łódź is one of the leading centres of the BSS sector in Poland.

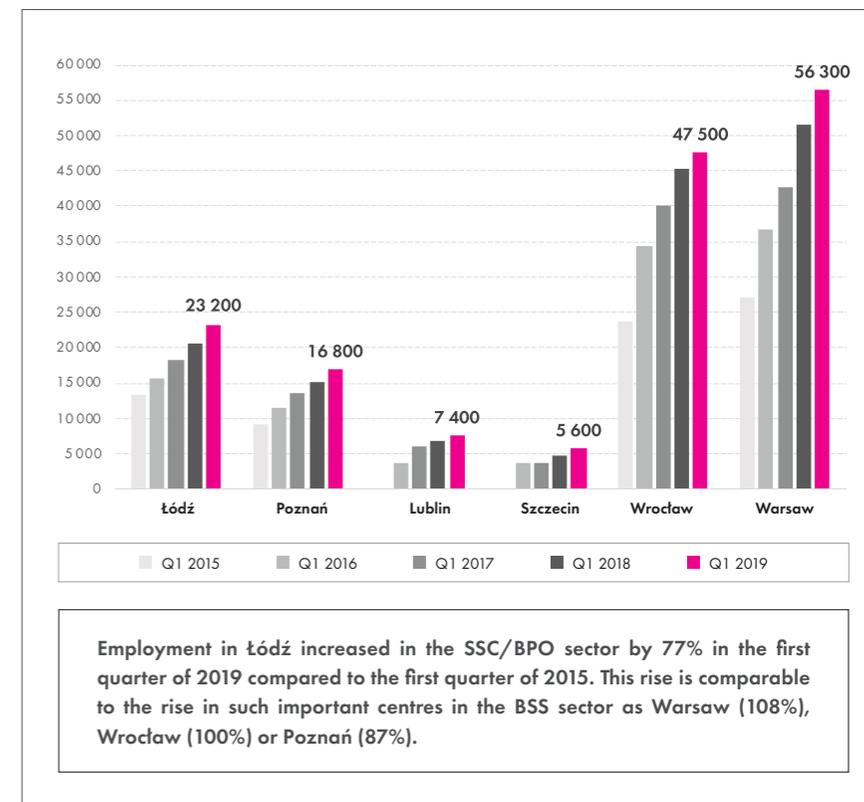
On the right, employment in the SSC/BPO sector in Łódź is presented against the background of 5 Polish cities which compete with the Łódź agglomeration for investors.

The dynamic development of the SSC/BPO sector in Poland is also reflected in a gradual increase in wages, which results from greater competitiveness and availability of qualified employees.

The table below presents the wage growth dynamics in the BSS sector for selected specialised job positions within particular business processes in the years 2015-2019²⁶. The data for 2015 are presented on a nationwide scale. The data for 2016-2019 have been compiled for individual cities (for the purpose of comparative analysis, the cities which could compete with the Łódź region for investors have been selected).

The tables include monthly gross salaries (in PLN) for job positions requiring English language skills (the following salaries do not include language bonuses).

Number of persons employed in the SSC/BPO sector²⁵



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All-Poland data	
Job position	2015
AP/AR Accountant (1-3 years of experience)	3 700 – 6 000
GL Accountant (1-3 years of experience)	4 500 – 6 500
Customer Service Specialist (up to 2 years of experience)	3 500 – 4 200
Help Desk Specialist 1st line support	2 800 – 4 000
HR Administrator (up to 2 years of experience)	2 800 – 4 400
Payroll Specialist (1-3 years of experience)	3 500 – 5 000
Logistics / Supply Chain / Procurement Specialist (1-3 years of experience)	4 800 – 6 500

²⁵ The data come from ABSL reports "Modern business services sector in Poland", project coordinator: J. Górecki - 2015, 2016, 2017, 2018 and 2019 editions.

²⁶ The source data, on the basis of which the tabular presentation was prepared, come from ABSL reports "Modern business services sector in Poland", project coordinator: J. Górecki - 2015, 2016, 2017, 2018 and 2019 editions.

Łódź				
Job position	2016	2017	2017	2019
AP/AR Accountant (1-3 years of experience)	4 000 – 5 500	4 200 – 5 800	4 500 – 5 800	4600 – 5800
GL Accountant (1-3 years of experience)	4 500 – 6 000	4 500 – 6 000	5 000 – 6 000	5200 – 6500
Customer Service Specialist (up to 2 years of experience)	3 500 – 4 500	3 800 – 4 800	4 000 – 4 800	4000 – 5000
Help Desk Specialist 1st line support	3 200 – 5 000	3 200 – 5 500	3 500 – 6 000	4000 – 6000
HR Administrator (up to 2 years of experience)	3 300 – 4 200	3 300 – 4 200	3 500 – 4 600	3800 – 4800
Payroll Specialist (1-3 years of experience)	4 500 – 6 500	4 800 – 6 500	4 800 – 6 700	4800 – 6700
Logistics / Supply Chain / Procurement Specialist (1-3 years of experience)	4 000 – 6 000	5 000 – 6 000	5 000 – 6 500	5000 – 6800
Poznań				
Job position	2016	2017	2017	2019
AP/AR Accountant (1-3 years of experience)	4 000 – 5 000	4 000 – 5 000	4 600 – 6 000	4 600 – 7 000
GL Accountant (1-3 years of experience)	4 200 – 5 200	4 500 – 5 500	5 000 – 6 300	6 000 – 7 200
Customer Service Specialist (up to 2 years of experience)	3 000 – 4 500	4 000 – 5 000	4 200 – 5 000	4 200 – 6 000
Help Desk Specialist 1st line support	3 500 – 5 500	4 000 – 5 500	4 500 – 6 000	5 000 – 6 000
HR Administrator (up to 2 years of experience)	3 200 – 4 200	4 200 – 5 000	4 500 – 5 700	4 800 – 5 800
Payroll Specialist (1-3 years of experience)	4 000 – 5 500	4 500 – 6 000	4 600 – 6 300	4 800 – 6 400
Logistics / Supply Chain / Procurement Specialist (1-3 years of experience)	4 500 – 6 000	4 500 – 6 000	5 000 – 6 700	5 000 – 7 000
Lublin				
Job position	2016	2017	2017	2019
AP/AR Accountant (1-3 years of experience)	no data	4 000 – 6 000	4 000 – 5 500	4 500 – 5 500
GL Accountant (1-3 years of experience)	no data	4 500 – 6 300	4 500 – 6 500	4 500 – 6 500
Customer Service Specialist (up to 2 years of experience)	no data	3 500 – 4 500	3 700 – 4 700	3 700 – 5 000
Help Desk Specialist 1st line support	no data	4 000 – 5 500	4 000 – 5 500	4 000 – 6 500
HR Administrator (up to 2 years of experience)	no data	no data	no data	no data
Payroll Specialist (1-3 years of experience)	no data	no data	no data	no data
Logistics / Supply Chain / Procurement Specialist (1-3 years of experience)	no data	no data	no data	no data
Szczecin				
Job position	2016	2017	2017	2019
AP/AR Accountant (1-3 years of experience)	no data	3 800 – 4 500	3800 – 4500	4000 – 4800
GL Accountant (1-3 years of experience)	no data	4 000 – 5 000	4000 – 5000	4500 – 6000

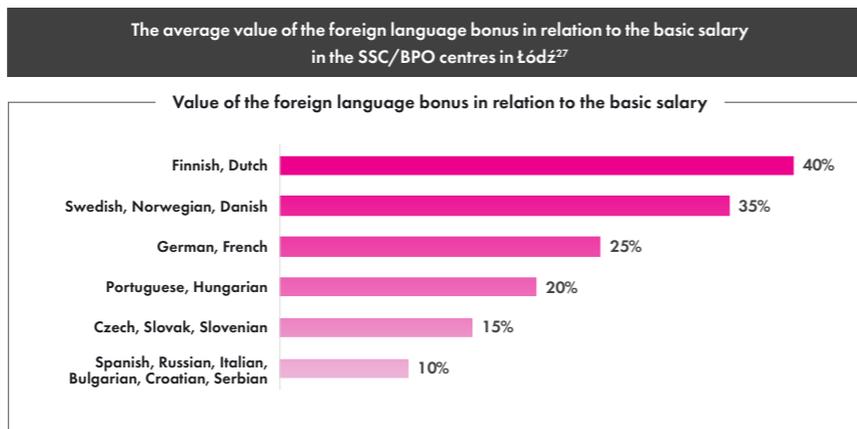
Szczecin				
Job position	2016	2017	2017	2019
Customer Service Specialist (up to 2 years of experience)	no data	3 500 – 5 000	3 500 – 5 500	4 200 – 6 000
Help Desk Specialist 1st line support	no data	4 000 – 5 000	4 000 – 5 000	4 500 – 6 000
HR Administrator (up to 2 years of experience)	no data	no data	no data	no data
Payroll Specialist (1-3 years of experience)	no data	no data	no data	no data
Logistics / Supply Chain / Procurement Specialist (1-3 years of experience)	no data	no data	no data	no data
Wrocław				
Job position	2016	2017	2017	2019
AP/AR Accountant (1-3 years of experience)	4 500–5 000	5 000 – 6 500	5 300 – 6 500	5 500 – 6 600
GL Accountant (1-3 years of experience)	5 000–6 500	5 000 – 7 000	5 300 – 7 000	6 000 – 7 500
Customer Service Specialist (up to 2 years of experience)	4 000–5 000	4 000 – 5 500	4 500 – 6 000	4 700 – 6 500
Help Desk Specialist 1st line support	3 400–5 500	3 600 – 5 500	4 000 – 5 800	5 000 – 7 000
HR Administrator (up to 2 years of experience)	3 500–4 200	4 500 – 5 500	4 500 – 6 000	4 500 – 6 000
Payroll Specialist (1-3 years of experience)	5 000–6 000	5 000 – 6 500	5 500 – 6 500	6 000 – 7 000
Logistics / Supply Chain / Procurement Specialist (1-3 years of experience)	5 000 – 7 000	5 500 – 7 000	5 500 – 7 300	6 000 – 7 500
Warsaw				
Job position	2016	2017	2017	2019
AP/AR Accountant (1-3 years of experience)	5 000 – 6 500	5 500 – 6 700	5 800 – 7 000	6 000 – 7 200
GL Accountant (1-3 years of experience)	6 000 – 8 000	6 500 – 8 500	6 500 – 8 500	7 000 – 9 000
Customer Service Specialist (up to 2 years of experience)	4 000 – 6 000	4 200 – 6 000	4 300 – 6 000	4 500 – 6 200
Help Desk Specialist 1st line support	4 000 – 5 500	4 000 – 6 000	4 500 – 7 000	5 000 – 7 000
HR Administrator (up to 2 years of experience)	4 500 – 6 000	4 800 – 6 000	4 800 – 6 000	4 800 – 6 200
Payroll Specialist (1-3 years of experience)	5 000 – 7 000	5 500 – 7 000	5 800 – 8 500	6 200 – 9 000
Logistics / Supply Chain / Procurement Specialist (1-3 years of experience)	5 500 – 8 000	6 000 – 8 000	6 200 – 8 000	6 200 – 8 500

In Łódź, an upward trend in wages can be observed, also when compared to other cities; that rise in pay corresponds with nationwide trends in Poland. At the same time, earnings in Łódź still remain lower than in Warsaw, Poznań and Wrocław, and they do not differ significantly from those in Lublin and Szczecin. On the one hand, regular pay rises make the SSC/BPO sector attractive for the employees of the Łódź agglomeration, and on the other hand, the level of salaries – lower than in other cities – makes Łódź attractive for investors (especially when the cost of renting office space, significantly lower than in Warsaw or Wrocław, is taken into consideration).

In addition to the average salary for posts requiring knowledge of English, the average salary for the positions involving the support of processes in other foreign languages (most often these positions require knowledge of a specific foreign language and English) should also be taken into account.

Foreign language bonuses in the BSS sector are either a separate remuneration component as defined in the organisation's pay policy or a component of a single wage amount that is not divided into basic salary and foreign language bonus. The second approach is more common. In both cases, the easiest way to classify foreign language bonuses is to compare the remuneration in a specific position in which a specific foreign language is required with the remuneration in a similar position in which solely English is required (English being the lingua franca used in most centres and the knowledge of which is not rewarded with a bonus).

The average value of the foreign language bonus in relation to the basic salary in the SSC/BPO centres in Łódź is presented on the right side²⁷.



Comparison of salaries in foreign locations that may compete with Łódź for investors.

Job position	Gross monthly salary in PLN broken down by location and year to which the data relate ²⁸						
	Bratislava 2018	Brno 2018	Budapest 2018	Vilnius 2018	Bulgaria 2019	Cluj-Napoca 2019	Riga 2019
AP/AR Accountant	4 300 – 5 160	4 300 – 4 950	4 730 – 4 950	6 780	4 390	4 240	3 840
GL Accountant	5 160 – 6 880	4 950 – 5 800	6 020 – 6 880	9 630	8 790	6 470	7 670
Customer Service Specialist	3 900 – 4 750	4 080 – 4 520	4 300 – 4 730	5 520	4 620	4 150	3 900
Help Desk Specialist 1st line support	3 900 – 4 300	4 090 – 4 950	4 300 – 4 730	no data	4 580	b.d.	no data
HR Specialist	5 160 – 6 450	4 730 – 5 160	5 380 – 5 800	no data	5 680	5 270	no data
Payroll Specialist	5 160 – 6 020	4 950 – 5 600	5 160 – 6 450	no data	4 760	no data	no data
Procurement / Logistics Planner	5 160 – 6 450	4 730 – 6 020	3 440 – 6 450	7 060	6 050	4 520	6 060

The wage growth in the last few years in foreign centres with comparable investment potential to Łódź also indicates a regular and gradual increase in wages. This is confirmed by the comments of labour market experts from Antal's foreign branches.

²⁷ Source data: Revitalizing a vibrant business and living hub: Łódź, edited by Jones Lang LaSalle, Hays, Urząd Miasta Łódź (The City of Łódź Office), Łódź 2019.

²⁸ Data sources: Bratislava, Brno and Budapest – <https://multimedia.getresponse.com/getresponse-BV6sw/documents/672023904.pdf>
 Vilnius – <https://www.flandersinvestmentandtrade.com/export/sites/trade/files/attachments/LT%20business%20services%20report%202019.pdf>
 Bulgaria – <https://www.payscale.com/rcsearch.aspx?category=&str=payroll&CountryName=Bulgaria&SourceId=>
 Cluj-Napoca – <https://www.averagesalariesurvey.com/cluj-napoca-romania>
 Riga – <https://www.averagesalariesurvey.com/riga-latvia>; <https://teleport.org/cities/riga/salaries/>
 The amounts for Cluj-Napoca, Bulgaria and Riga were converted from local currencies and USD into EUR according to the average exchange rate of the National Bank of Poland as of 22 October 2019.

The recruiter's perspective

Czech Republic

Marek Žalud

COUNTRY MANAGER
ANTAL CZECH REPUBLIC & SLOVAKIA

Business services sector in Czech Republic is expanding year over year, both in terms of headcount (estimated 50k employees in 2014 to over 100k in 2019) and complexity of services delivered within over 290 business centers across Czech Republic.

IT services has always been an important part of the business and today in 2019, IT related services take over 40% of the whole sector, with Customer Services and Finance being strong too. According to our experience and ABSL's sector study, in 2018 the proportion of employees within the business services centres located in Prague rose to 50%.

At the same time Brno and Ostrava together continue to host more than a third of the sector. Other emerging regions include Olomouc, Plzeň, Hradec Králové, Liberec, České Budějovice or Pardubice. As most of the employers compete for the similar candidate profiles, war for talent continues and forces companies to deploy employer branding strategies to attract talent. Salary growth YoY is estimated to 4-8% and for entry level positions is mostly given in a form of language bonuses. As the sector faces high employee rotation, basic salary levels are in most of the cases at the same level and are negotiated individually based on the competency level, hiring urgency or language skills.

Hungary

Anikó Nahlik

TEAM LEADER
ENLOYD HUNGARY

The Business Services sector is extremely successful in Hungary nowadays and expanding by 10-15 percent annually, with more than 110 centers employing ca. 50,000 people.

Just last year, ten new investments worth more than € 10 million were announced, creating at least 1,200 new jobs. Companies are bringing more complex and higher value-added services to our country, and simple ones are being automated or typically outsourced to India. Most SSC settlers in Hungary chose Budapest (XIII and XI district) and the second most attractive city is Debrecen (selected companies: Epam, British Telecom, CloudAgents, Diehl Aviation Hungary Kft., EHA Kft., Flowserve Hungary Services Kft., IT Services Hungary Kft., NI Hungary Kft.).

Besides the already mentioned cities Székesfehérvár could become an important SSC base (selected companies: Harman-Becker, Hydro, Arconic, Emerson, Grundfos). In Budapest it is estimated that only 5% of the total employees work in business services sector, the biggest employers are: GE, Morgan Stanley, a Vodafone, a British Petroleum, a British Telecom, Tata, Alcoa. Labour shortages in this sector do not stop companies from expanding. For all entry level positions salary growth is kept at the same level as for many employees SSC type of job is a first or second job in their careers, also attractive employer brands are able to "squeeze" salary expectations for entry level jobs. Specialists and managers seem to be more lucky as with their skills and know how they are more valuable and able to receive from 3 to 5% raises YoY.

5.04 Hiring prospects in the context of recruitment process

Employment costs depending on the form of recruitment

The following factors, such as: new investments, large-scale reinvestments, high competitiveness of the industry sector, size-limited internal HR departments, hiring urgency and difficulties in finding specific competency profiles – all contribute to the fact that the SSC/BPO sector uses, to a large extent, the support of external recruitment agencies in recruitment processes. Below are presented the possible forms of recruitment cooperation with an external partner and the nature of services, duration of the process and costs depending on the type of recruitment service.

Form of recruitment		
Recruitment service	Recruitment costs	Duration of recruitment process for 1-2 vacancies in a standard business process
recruitment in cooperation with a recruitment agency based on the success fee model (paid only in case of finalised recruitment process)	15-19% of the candidate's yearly remuneration gross (paid only if the selected candidate is recruited)	2-6 weeks (depending on the difficulty of the project)
recruitment in cooperation with a recruitment agency based on the pre-payment model	15-19% of the candidate's yearly remuneration gross (fee divided into two or three instalments, the first instalment to be paid at the start of an active search process, the last instalment to be paid only if the selected candidate is recruited)	2,5-4 weeks (depending on the difficulty of the project and the hiring urgency; most of the recruitment processes based on this payment method concern highly difficult projects)
outsourcing / contract with an external recruitment agency	The employee's daily rate with calculated recruitment and personnel administration costs or employee's hourly rate + fixed monthly fee for administration and recruitment costs	2-4 weeks (depending on the difficulty of the project and the hiring urgency)
RPO (Recruitment Process Outsourcing)	monthly subscription fee for an external recruitment consultant + flat-rate recruitment costs amounting to 8-12% of the candidate's annual gross salary (depending on the contracted duration of the RPO service, the volume of recruitment and the amount of fixed subscription fee)	2-3 weeks (depending on the difficulty of the project, the size of the project team and the volume of parallel recruitment projects)

In the case of mass recruitment, the RPO model is particularly recommended due to the outsourcing of the recruiter, who is delegated to the client's office and works exclusively for him with the support of a dedicated project team; thanks to this, it is possible to efficiently carry out high-volume recruitment process and optimise costs due to a lower fee for every employee recruitment.

The duration of the recruitment process, apart from the model of cooperation, is also influenced by the job offer itself, and especially by the offered remuneration. How attractive the remuneration is in the current job market situation will determine the length of time for which an employee should be sought. For example: looking for a candidate for the AP department with experience and proficiency

in English in Łódź and offering monthly salary of about 4 500 PLN gross may take a month longer than when the offered salary amounts to 5 500-6 000 PLN gross.

Factors such as office location, working hours, etc. may have quite similar impact on the length of the recruitment process.

5.05 Development trends and growth directions of the BSS sector in Łódź

Among the development trends and growth directions of the SSC/BPO sector, it is worth mentioning several dominant tendencies in the area of human capital and market practices.

First and foremost, the business services sector is increasingly open to the employment of foreigners under standard procedure, and not in emergency situations. Proficiency in Polish is required less and less frequently, and companies introduce programmes which facilitate relocation from the financial, organisational and formal point of view. At the same time, business services centres are opening their doors to foreign workers who had never previously lived in Poland. As far as visas, residence and work permits are concerned, the awareness of employers is also growing. Companies often employ experts who specialise in migration issues or cooperate with migration organisations. This is a trend which can be observed throughout Poland, but on a local scale, in the Łódź region, this trend has been visible for several years now, as at least a few SSC/BPO centres in Łódź are at the forefront of best practices when it comes to recruiting and employing foreigners.

Secondly, among the trends which can be observed in this sector, it is worth pointing out the benefits offer in the SSC/BPO sector which is increasingly more attractive and constantly extended (we can find many examples of this attractiveness also in the Łódź job market). BSS centres often offer not only sports cards, private medical

care and insurance, but also a wide range of training and language courses, flexible working hours, telework, in-office massage programmes, rooms for relaxation, co-financing for meals, preschools and crèches for employees' children and relocation packages.

Thirdly, the BSS sector is constantly expanding and getting more flexible in terms of competence requirements. This trend can also be observed in Łódź. The sector is expanding in terms of business processes and career advancement. It gives the possibility of competence development and a more diversified career path. Thanks to that, the voluntary turnover of staff resulting from the repetitive character of processes should decrease. For example, accounting departments in Polish services centres have evolved from supporting the simplest processes in the area of Accounts Payable to financial analysis and controlling. At the same time, Polish services centres become more and more flexible in terms of competencies and skills required from candidates. In the case of basic positions (entry level or junior specialists), the key requirements often boil down to the good command of a foreign language and a degree in the field of study and/or adequate traineeship or internship programmes.

Łódź's excellent and rich academic background makes this city attractive to investors. Employers confirm at the same time that more and more often, they employ people from other industry sectors, offering them training

in the area of ERP systems or some specific processes. Thus, human capital in the BSS sector is not limited to employees from other competitive services centres. That gives Łódź yet another trump card boosting its investment potential, given the valuable source of personnel from other organisations, such as production and logistics centres with well-developed office facilities.

When observing the market trends, one may put forward a hypothesis that alternative sources of candidates for job offers will necessarily gain in importance. Employees with expertise in finance and accounting, HR, banking, logistics and procurement are of particular importance to this sector. The human capital potential of the Łódź agglomeration in these areas is satisfactory and offers great opportunities for the migration of competencies from other types of organisations to the BSS sector.

At the same time, the Łódź academic base guarantees every year a pool of students and graduates of foreign language departments, finance, banking, accounting and business schools ready to enter the job market. It is also possible to forecast a growing demand for tech-savvy talents from the broadly understood IT industry, given the visible trend of business process automation and robotisation. Here also, both the academic background and the availability of specialists on the Łódź market will allow to attract young talents and/or appropriate specialists.

The business perspective

Joanna Rzeźniczak

CHAIRMAN OF THE BOARD
BUSINESS SUPPORT SOLUTION

The location of Łódź at the very heart of Poland makes it an ideal city for those who need to be in touch with their customers, both in Poland and in Europe. Recent transport infrastructure investments, among which the Łódź Fabryczna station is worthy of special mention, have significantly increased the comfort of travelling and reduced the travel time, thus giving the freedom of access to other large cities, which is crucial in building business relations. Additionally, lower labour and living costs than in the capital city make Łódź an attractive place both for employers developing their businesses and for employees who willingly settle down in Łódź for good.

Łódź is a magnetic city and exudes positive energy, which makes cooperation in various areas not only professional and productive, but also based on good partnership principles and relations. Being open to communication and seeking synergy, which is beneficial to all parties involved, is also of utmost importance. As a BSS, we leverage the numerous opportunities offered by the City of Łódź Office to promote jobs and engage in local activities and competitions for employers, which are organised on a regular basis.

BSS SA is a part of the PELION Group which, since its beginning, has always been associated with Łódź. However, we appreciate this location not only out of sentiment, but also because of the availability of human capital. There are 20 higher education institutions in Łódź, with over 20 thousand people graduating from them every year; that means that we have access to both young people entering the job market and starting their professional career, as well as to experienced employees.

Business services sector is an ideal place to start your career as well as to develop it. As you progress and increase your skills and competencies, we invite our employees to work in teams focused on specialist areas of accounting, human resources and payroll services, finance or IT solutions in financial areas. Additionally, there is an area within the BSS structure where you can develop your skills in the areas of team and project management. Our ever-growing need and ambition to constantly adjust to the market and customer requirements make it possible for process-oriented people, who want to improve and optimise the processes, to find their place here, according to the principle: work smarter, not harder.

The business perspective

Magdalena Józwiak-Fedyk

HR MANAGER, INFOSYS POLAND

When we entered the Łódź market several years ago, we mainly provided accounting services. Today, this type of services is only a part of our company's activity. Our clients are looking for comprehensive tax services, procurement data management, business transformations, logistics management processes and risk management services. Currently, we successfully carry out these tasks for 28 clients in 64 languages.

Our international team consists of over 2 300 specialists in various fields of expertise. Employees of Infosys Poland develop their skills and competencies in the following fields: logistics, procurement, finance, HR, data management, analytics, new technologies, consulting and customer service.

But we are constantly looking for other employees as well, not only highly qualified specialists. We have been successfully running internship programmes for years. The opportunity to work in an international environment and learn about state-of-the-art business solution attracts young talents who take their first steps in their professional career.

The quality of our services and the expertise of our employees have been highly appreciated by our customers. The company has also been awarded the title of ACCA Approved Employer by ACCA, and the title of Development Quality Partner Certificate by CIMA, as the only company in the Łódź market. We are also a member of the prestigious ABSL Association.

For years, we have been involved in cooperation with universities, including the University of Łódź and the Łódź University of Technology. We also actively cooperate with the City of Łódź Office. The implementation of joint projects strengthens business contacts, fosters entrepreneurship and allows to create unique social projects, thus involving not only employees or students, but also city residents.

Part 6

54 Information
Technology



6.01

Introduction

Due to its convenient location right in the centre of Poland, Łódź has many assets which attract investors and make it attractive for activities related to innovative technologies. The development of the city in multiple areas and directions attracts young and innovative people; they are keen to develop their skills and competencies, and invest in new technologies. The city and its ICT potential has been built on the basis of previously developed sectors such as telecommunications and services.

Currently, Łódź is a place where the 5G technology, which is the standard for next-generation mobile networks, is developing dynamically. In the "5G Strategy for Poland" published in 2018, Łódź was recognised as the first city to pilot and implement 5G networks in Poland.

The city of Łódź creates favourable conditions for investing in new technologies and its the professional development of its residents. Every year, permanent events related to the IT & telecommunication industry take place here. Local government entities invite everyone to implement their innovative ideas, providing help at various levels of social and economic activity, including:

- through building dialogue between universities and business entities
- through developing urban infrastructure and creating co-working space
- through organising conferences, fairs and events in the ICT industry
- through broadly defined consulting and advisory services in the field of investment
- through streamlining and optimising administrative processes regarding work permits for shortage occupations most in demand in Poland
- through facilities for young innovative business entities
- through renovation of old historic tenement houses and social utility buildings
- through investments in urban transport

Consistent actions of local institutions in Łódź create attractive incentives for many IT specialists to relocate or to return to their native city of Łódź.

6.02

Profiles of leading employers in the IT sector

Asseco Data Systems

Nature of business activity in Łódź: software company and comprehensive IT services .

The company is a leader on the Polish market in the field of IT products, services and solutions based on the company's own original software and third-party software for enterprises and local government administration.

Comarch

Nature of business activity in Łódź: software house.

Comarch is a large Polish software company which has been operating in the Polish market for 26 years. Comarch's main products include business applications and comprehensive IT solutions tailored to the needs of companies operating in the telecommunications, finance, telemedicine, and IoT sectors.

Cybercom Poland

Nature of business activity in Łódź: software company for customers from the automotive, telecommunications, e-commerce/digital sectors.

Cybercom is a multinational company based in Sweden. The company creates dedicated IT solutions for customers in the field of IoT, Smart City and innovative solutions improving the quality of people's life and work through appropriate communication,

transportation network, and proper leisure time. Cybercom willingly enters into cooperation with start-ups, other IT companies and target audience of business applications.

Ericsson

Nature of business activity: R&D activity, software company providing application development services for other customers.

Ericsson came to Łódź through acquisition of Ericpol Sp. z o.o. in 2016. At present it is a leading company on the Polish market as regards preparation for implementation of 5G technology. It cooperates with higher education institutions and operators, and it supports local start-ups in popularising 5G solutions. Ericsson operations in Poland considerably contribute to the development of global ICT solutions. The company employees in Cracow and Łódź work on software for wireless access that is in use throughout the world. Ericsson pursues also projects outside the telecommunications area. It is one of the biggest companies in Poland in the ICT industry. Poland has become the second largest Ericsson research and development centre globally

Fujitsu Technology Solutions Global Delivery Center

Nature of business activity in Łódź: R&D, software company, BPO, customer care.

Global Delivery Centre in Łódź is 100% owned by the Japanese Fujitsu Ltd and runs its business in the broadly understood ICT technologies aimed at creating comprehensive IT solutions to make people's lives easier. The R&D Centre in Łódź takes part in the creation of solutions in the field of IoT, AI, security, cloud computing security, domain management and IT infrastructure.

GFT Poland

Nature of business activity in Łódź: software house, customer care.

GFT was established in Germany as a small company operating in the financial sector. Since 2001, it has become a pioneer of nearshoring services with a global team of approximately 5 thousand employees in 13 countries. GFT Poland comprises three offices located in Łódź, Poznań and Warsaw. The company deals with the development of systems and applications for investment banks mainly in Java and JavaScript.

Harman Connected Services Poland

Nature of business activity in Łódź: R&D, software house, customer care.

The company is 100% owned by Samsung Electronics Co Ltd. The company operates in the automotive market and takes part in the development of advanced solutions for the automotive industry, such as the in-vehicle sound platform, award winner in the "TU-Automotive Awards 2017" competition;

a complete, end-to-end cloud platform (the HARMAN Ignite Platform); HARMAN OTA software management system; navigation systems or the most modern in-vehicle infotainment system, created for the new Mercedes-Benz A-Class.

Idemia

Nature of business activity:

R&D /Design Center, Support Center.

Idemia has developed state-of-the-art technologies and services using artificial intelligence, biometry and cryptography. This makes IDEMIA an important technological player in identity management, authentication and payment security. The R&D team from Łódź specialises in Digital SIM, Digital Payments and Digital Identity solutions – areas of identity verification, digital payments and all issues related to virtualization of classical tools such as ID cards, SIM cards, payment cards and passports. In 2019, Idemia successfully passed certification process and was awarded the title of “Top Employer 2019” on the Łódź market in the Programming category, because the software developers working on various projects have a real impact on how they work.

MakoLab

Nature of business activity in Łódź:

digital services, dedicated applications.

MakoLab is a Polish company providing services in the area of digital transformation. It offers its customers, leaders in a given industry, comprehensive consulting services in the field of digital policy development, including the development and implementation of dedicated applications.

The services have been used by many clients from various industries, as well as in various areas of digital transformation such as e-commerce, CRM, connected car, mobile applications, Internet marketing, user experience, Internet analytics, data centre services, scientific software.

TomTom

Nature of business activity:

R&D activity, software company, customer care.

TomTom was founded in 1991, in Amsterdam, and has grown from a Dutch-based start-up company into a leading multi-national, global brand. The company specialises in developing map applications, navigation and GPS applications, communication software, and ADAS software for automated driving. The company develops applications for the automotive industry, OEMs, vehicle intermediaries, leasing companies as well as individual customers. Every day, millions of people around the world travel and make decisions based on TomTom solutions. The company is based on four business lines: consumer, automotive, licensing and telematics. The Łódź branch is the third largest TomTom office in the world. The Polish company employs over 600 people and is still growing dynamically, as evidenced by the construction of the second building at 94, Żeromskiego Street in Łódź.

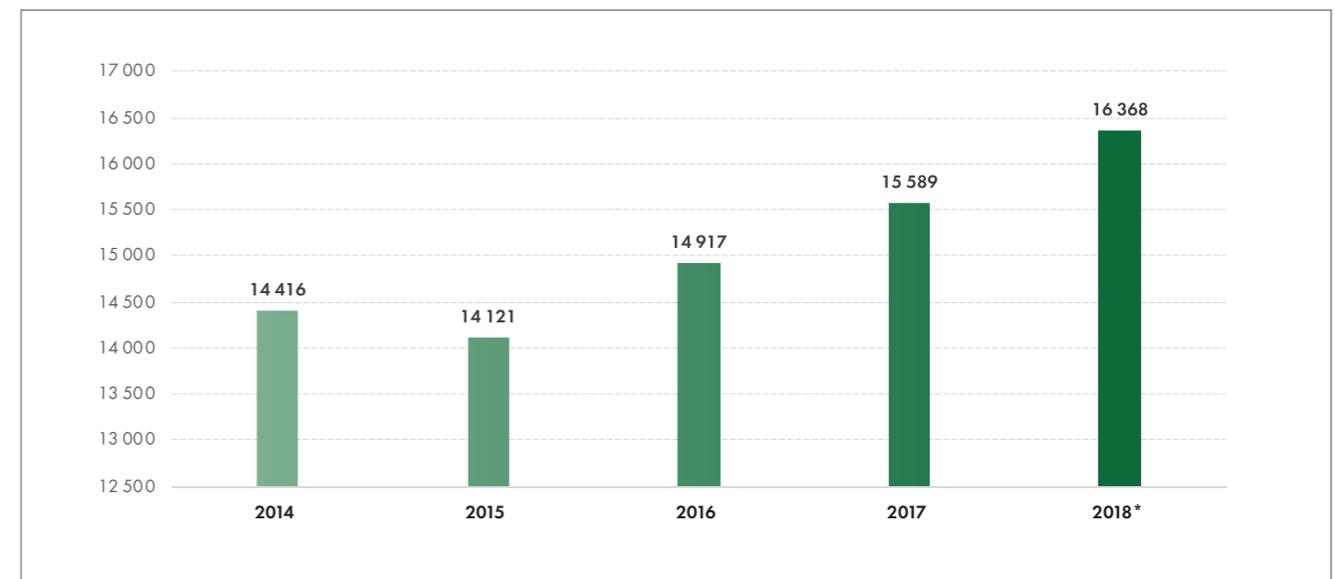
6.03

Employment and salaries in the IT sector

Employment in the IT sector in the Łódź Province has been gradually growing (apart from a slight decline in the number of people employed in the IT sector in 2015).

For the last 3 years, there has been a 5% increase in Łódź, which is slightly lower than the nationwide dynamics throughout Poland, where the rate is 8%. It is worth noting, however, that the dynamics estimated by Antal experts in the Łódź agglomeration amounts to 10%.

Number of people employed in IT sector



* estimates based on preliminary information

The salary growth in the IT sector is relatively high when compared to other industry sectors.

On the next page are presented data for sample positions²⁹ in Łódź and other cities which, according to Antal’s analyses, are the most competitive in the context of attracting foreign investments in the IT sector. The job rates are presented on a gross monthly basis.

²⁹ Antal data on the basis of completed recruitment processes.

Java Developer, .NET, C/C++

	Łódź	Warsaw	Wrocław	Kraków	Poznań	Gdańsk
2018						
Junior	4 500	5 500	5 500	6 000	5 000	5 000
Regular	9 000	12 000	11 000	12 000	11 000	12 000
Senior	14 000	19 000	17 000	18 000	17 000	18 000
2017						
Junior	4 050	4 950	4 950	5 400	4 500	4 500
Regular	8 100	10 800	9 900	10 800	9 900	10 800
Senior	12 600	17 100	15 300	16 200	15 300	16 200
2016						
Junior	4 050	4 950	4 950	5 400	4 500	4 500
Regular	7 200	9 600	8 800	9 600	8 800	9 600
Senior	11 200	15 200	13 600	14 400	13 600	14 400
2015						
Junior	4 050	4 950	4 950	5 400	4 500	4 500
Regular	7 650	10 200	9 350	10 200	9 350	10 200
Senior	11 900	16 150	14 450	15 300	14 450	15 300
2014						
Junior	3 825	4 675	4 675	5 100	4 250	4 250
Regular	7 200	9 600	8 800	9 600	8 800	9 600
Senior	11 200	15 200	13 600	14 400	13 600	14 400

Automation tester

	Łódź	Warsaw	Wrocław	Kraków	Poznań	Gdańsk
2018						
Junior	4 500	6 000	6 000	6 000	4 500	4 500
Regular	8 000	10 000	10 000	10 000	9 000	10 000
Senior	12 000	16 000	15 000	16 000	14 000	15 000
2017						
Junior	4 500	6 000	6 000	6 000	4 500	4 500
Regular	8 000	10 000	10 000	10 000	9 000	10 000
Senior	12 000	16 000	15 000	16 000	14 000	15 000
2016						
Junior	4 275	5 700	5 700	5 700	4 275	4 275
Regular	7 600	9 500	9 500	9 500	8 550	9 500
Senior	11 400	15 200	14 250	15 200	13 300	14 250
2015						
Junior	4 275	5 700	5 700	5 700	4 275	4 275
Regular	7 600	9 500	9 500	9 500	8 550	9 500
Senior	11 400	15 200	14 250	15 200	13 300	14 250
2014						
Junior	3 825	5 100	5 100	5 100	3 825	3 825
Regular	6 800	8 500	8 500	8 500	7 650	8 500
Senior	10 200	13 600	12 750	13 600	11 900	12 750

Project Manager

	Łódź	Warsaw	Wrocław	Kraków	Poznań	Gdańsk
2018						
Junior	5 500	7 000	7 000	7 000	6 000	6 000
Regular	10 000	11 000	11 000	12 000	10 000	10 000
Senior	16 000	18 000	17 000	18 000	16 000	16 000
2017						
4950	4 950	6 300	6 300	6 300	5 400	5 400
9000	9 000	9 900	9 900	10 800	9 000	9 000
14400	14 400	16 200	15 300	16 200	14 400	14 400
2016						
Junior	4 400	5 600	5 600	5 600	4 800	4 800
Regular	8 000	8 800	8 800	9 600	8 000	8 000
Senior	12 800	14 400	13 600	14 400	12 800	12 800
2015						
Junior	4 125	5 250	5 250	5 250	4 500	4 500
Regular	7 500	8 250	8 250	9 000	7 500	7 500
Senior	12 000	13 500	12 750	13 500	12 000	12 000
2014						
Junior	4 125	5 250	5 250	5 250	4 500	4 500
Regular	7 500	8 250	8 250	9 000	7 500	7 500
Senior	12 000	13 500	12 750	13 500	12 000	12 000

DevOps/System Administrator

	Łódź	Warsaw	Wrocław	Kraków	Poznań	Gdańsk
2018						
Junior	4 500	5 500	5 500	6 000	4 500	4 500
Regular	9 000	13 000	13 000	13 000	11 000	11 000
Senior	13 000	18 000	17 000	18 000	16 000	16 000
2017						
Junior	4 275	5 225	5 225	5 700	4 275	4 275
Regular	8 550	12 350	12 350	12 350	10 450	10 450
Senior	12 350	17 100	16 150	17 100	15 200	15 200
2016						
Junior	4 050	4 950	4 950	5 400	4 050	4 050
Regular	8 100	11 700	11 700	11 700	9 900	9 900
Senior	11 700	16 200	15 300	16 200	14 400	14 400
2015						
Junior	3 375	4 675	4 675	5 100	3 825	3 825
Regular	6 750	11 050	11 050	11 050	9 350	9 350
Senior	9 750	15 300	14 450	15 300	13 600	13 600
2014						
Junior	3 375	4 400	4 400	4 800	3 600	3 600
Regular	6 750	10 400	10 400	10 400	8 800	8 800
Senior	9 750	14 400	13 600	14 400	12 800	12 800

Łódź in the eyes of employers

Renata Czechowska

HR BUSINESS PARTNER
ASSECO DATA SYSTEMS SA

We are a company that produces and develops software, among our clients are leasing companies and local governments. Apart from delivering IT infrastructure, we offer data centres, systems of human capital management and training, and we also specialise in data safety and data trust, as well as in mass communication.

We bring together the knowledge and many years of experience of nearly 1 thousand experts as well as various types of competence, which makes us a reliable partner in creating, developing and maintaining IT systems for both business and public administration.

Our driving force is staying in close contact with our clients and a thorough understanding of their needs, through our operations in over a dozen of offices in entire Poland. In this way, we are able to preserve the flexibility characteristic of smaller

Harman chose Łódź as the place for its office in the light of the city's central location in Poland, which makes communication with other parts of the country easy, as well as the academic environment and the number of students at the technical universities.

In the recruitment process we have acquired some employees through their relocation and we plan to continue this mode of operation. Currently, around 40 persons working in our company are after relocation, which constitutes over a dozen percent of the total number of our employees. We are open to further acquisition of employees from the areas near Łódź and from neighbouring provinces, and also from abroad. I assess the level of competence of IT professionals from Łódź as very high and I am interested in employing them.

companies, but we also draw on the great potential of Asseco Group – the Polish IT giant with an international reach.

For several years now we have been cooperating with the City of Łódź Office, the Career Office of the Łódź University of Technology and the Career Office at the University of Łódź. We participate in projects pursued as part of “The Young in Łódź” Programme – in this year, we took on three students as trainees, and now they work with us as full-time employees. We also take part in the Academic Job Fairs and in the Open Doors Day at the Faculty of Electrical, Electronic, Computer and Control Engineering of the Łódź University of Technology.

We are happy that we can count on the support from the city authorities and educational institutions in promoting our company and building its position on the job market.

We are a member of the ICT Cluster in Łódź and we value the support it offers us, just as the support from the local authorities. This is visible in their open approach to communication and their involvement in important matters and discussions. Łódź is seen as a city with well-developed infrastructure and new investments that are beneficial also for its residents, which is confirmed by our employees relocated from abroad and also from other cities in Poland.

We are very happy with our presence in this part of Poland and we plan to keep developing our business and accepting new projects to implement them as part of our activity.

Łódź in the eyes of employers

Dorota Duchnowicz

HR CONSULTANT IN ŁÓDŹ
ATOS POLAND GLOBAL SERVICES

We are not just another IT company. We are an international leader in digital transformation, employing over 110 thousand persons in 73 countries worldwide.

We offer such services as management of IT infrastructure, integration of IT systems, outsourcing and IT consultancy. For years we have been the global IT partner of the Olympic and Paralympic Games.

We hire around 5 thousand persons in 6 cities: Wrocław, Opole, Łódź, Warsaw and Bydgoszcz. In Atos Poland Global Services we invest in employee development, we create a friendly work environment, we ensure financial stability, trainings and certification. We guarantee access to the most advanced technologies and participation in prestigious projects. We offer various career development paths that are adjusted to the interests and skills of our employees.

Our office in Łódź is home to two companies: Atos Polska – local operations and Atos Poland Global Services – international projects. We offer job positions for professionals at every career stage, from juniors, seniors and experts, to IT architects. We seek Front-End Developers, DevOps engineers, IT architects, manual and automatic testers, consultants and SAP Maintainers, monitoring engineers, project and junior coordinators. We specialise in almost every IT technology and thus we can offer our clients IT services without the need of additional support from subcontractors.

Łódź is an academic city with 19 higher education institutions and 7 faculties offering IT specialisations. Every year Łódź has around 2 thousand excellent IT graduates, in particular from the Łódź University of Technology. Already in the 4th or 5th year of study students begin their professional career as junior IT specialists. Cooperation of Atos Poland Global Services with the Łódź University of Technology is very special because of the ICT Cluster membership. As part of the Cluster we organise various lectures, workshops and laboratories. We cooperate also with the city authorities by taking part in “The Young in Łódź” programme – we organise a series of workshops and lectures on the most popular and recent IT-related issues. These meetings take place in our Łódź office and provide participants with the opportunity to get to know our work environment.

Our location in the central part of Poland has the advantage of fast connections with other Polish cities.

Additionally, the economic situation of Łódź encourages foreign investors to locate their IT centres in the city. With these factors, Łódź is an ideal place to develop IT business.

Aleksandra Pierzgalska-Marciniak

HR MANAGER
HARMAN CONNECTED SERVICES POLAND

6.04

Average predicted length of the recruitment process in the IT sector

Average predicted length of the process of employee acquisition through outsourcing in the IT sector:		
Number of employees	Traditional recruitment model	RPO
100	7 months	7 months
200	14 months	12 months
300	2 years	18 months
500	3.5 year	2.5 year
1 000	4 years	4 years

Employees may be also recruited under the remote job model and this is the cheapest and relatively the fastest form of recruitment.

However, many oppose this form of employment, indicating such risks as limited possibility of work monitoring and difficulties in integrating the employee with the rest of the team.

Costs of employment in selected forms of recruitment		
Form of recruitment	Costs	Availability of candidates
Recruitment in cooperation with a recruitment agency	Up to 25% of the candidate's yearly remuneration gross	around 1 month
Outsourcing	Daily B2B rate for a candidate	around 1 month
RPO (Recruitment Process Outsourcing)	Lump sum fee for a recruitment consultant on site + lump sum costs of recruiting a candidate, up to the amount of the candidate's one-month salary gross	around 1 month
Recruitment for remote employment through an internal HR department	Internal costs of the HR department and recruitment costs	around 1 month

6.05

Predicted duration of change in the career path of a potential employee

The capacity of the ICT industry in Łódź is considerable and it has been estimated by the members of the ICT Cluster that there is still a need for 4 thousand IT professionals.

The higher education institutions with IT faculties in Łódź and in adjacent areas are not able to fill in this gap. Therefore, what is currently needed are new programmes that would attract such professionals from other regions of Poland or from abroad.

In the present situation employers from the ICT industry in Łódź are willing to hire professionals who would like to change their career path into ICT area. This is an important message for any professional with a diploma in a major other than IT and who knows English at the B2 level. Thus, any person who is flexible, open to further development and has analytical, synthetic and interpersonal predispositions, may in a short period of time change their qualifications by taking part in the courses available on the market.

There are many companies which have their branches in Łódź and which train future employees in the following areas:

- coding in a selected technology (at present there are courses that offer 360 hours of studying selected technologies: C#, Java, JavaScript, C/C++, Android, iOS)

- software testing (first, the candidate should complete a basic ISTQB course, and become familiar with one of the script languages)
- project management and project methods (Prince, Waterfall, PMBOK, Agile, Scrum)
- Service Desk/Help Desk (in particular courses in the area of IT infrastructure concerning operating systems, databases, application servers, peripheral devices, etc.)
- business and system analyses (courses in preparation of project documentation, including BPMN, Enterprise Architect, UML/ RUP)

There are many job positions which are an opportunity for persons who are at the stage of changing their career path and who wish to be part of the ICT job market, including:

- in project management: project manager assistant, junior project manager, junior scrum master
- coding: junior developer
- testing: manual tester or junior tester
- analyses: junior analyst
- Service Desk/Help Desk: first line support specialist, service analyst, KPI analyst

After many years of experience in recruitment in this industry, Antal consultants observe that many interesting candidates with a high level of competence in specific IT areas are not necessarily graduates from IT faculties.

The job market in this industry is not hermetic, it shows flexibility and anyone who is willing to develop their skills, is interested in IT and motivated by innovation will be valued on this market.

Part 7

66

Production

67

7.01

Introduction

The Łódź region is an industrial area that is attractive for various industries and investors but family companies and local entrepreneurs also often choose this city as the place for their business, not only for its convenient geographical location (central Europe and developed transport infrastructure) but also for partnership-based support from widely understood public institutions and business partners. It is for a reason that investors take into account the logistic indicators and the accessibility of specialised partners who can provide comprehensive services for the organisation on this market.

In the production industry we can mention several significant specialisations that this region is known for to a wide international audience. The first one is the widely understood industry of Home Appliance, with emphasis on production of large household appliances and external partners supplying elements, components or industry-dedicated solutions.

The Łódź region is one of the three largest centres of production of household appliances, next to the Dolny Śląsk region (Lower Silesia, represented by Wrocław with its large facilities of Bosch, Electrolux and Whirlpool), and Wronki (two Samsung factories and one Amica factory). A considerable percentage of companies operating on this market covers enterprises from the packaging, printing, pharmacy and textile industries (in the past this was unquestionably one of the dominant industry types in the Łódź region, and now we observe its revival, especially among local entrepreneurs).

7.02

Profiles of selected employers in the production industry**BSH Sprzęt Gospodarstwa Domowego Sp. z o.o.**

This company is among top global players in the area of the widely understood Home Appliance industry, specialising mainly in production of large household appliances. The company puts a great emphasis on research and development; in 2018 the expenses for this activity were at the level of 5%, which is a record result in the history of this corporation.

One of the examples of how the company embraces new technologies is the Home Connect system – a platform based on the Internet of Things technology enabling remote control of household appliances.

BSH Sprzęt Gospodarstwa Domowego successfully implements new investment projects not only in production, production logistics or R&D (a newly created investment to support division of washing and drying activities, providing at least 150 jobs for qualified employees), but also in the dynamically developing area of shared services centres.

Hydro Extrusion Poland Sp. z o.o.

An important player on the international aluminium market, seeking to be the only company in the world specialising in every aspect of this industry.

According to the agreement between Orkla and Norsk Hydro of 2017, the company has become an exclusive owner of the Sapa brand. In Łódź it has a dynamically developing factory that manufactures aluminium roof railings and decorative car mouldings. Following the latest trends, the factory focuses on automation and robotisation of all processes. In 2020 it plans to launch a varnishing line which will create further attractive job posts. At present,

Hydro employs 700 persons, mainly engineers, administration specialists and operation and production workers.

Whirlpool Company Poland Sp. z o.o.

An American company, one of the leaders of the Home Appliance industry, focusing mainly on electronic solutions for household appliances. The company now employs over 5,000 persons in the Łódź region.

Whirlpool is a workplace for many production and warehouse workers but also for engineers with unique qualifications (both in terms of quality and production, demonstrating a good understanding of the Lean Manufacturing philosophy, and an ability to think logically and set priorities). The company values employees who have a good command of foreign languages.

Gillette Poland International Sp. z o.o.

Gillette, manufacturer of shaving machines since 2005, belongs to global capital group Procter & Gamble. Its largest facility is located in Łódź where the company bought a local organisation Wizamet in 1992. It is the second largest P&G factory in the world. In 2004 it opened also its second factory in Nowy Józefów.

The factory employs nearly 1 200 persons with very varied professional profiles; however, it seeks primarily production workers with technical education or experience in a technical environment.

The organisation puts emphasis mainly on competence rather than on specific experience or knowledge, since with the production of shaving machines being very distinctive, each employee has to undergo a training programme regardless of their earlier experience.

Hutchinson Poland Sp. z o.o.

A French company forming part of international concern TOTAL, with several factories in Poland.

Its factories in Łódź specialise in production of car body seal systems and transmission belts for the automotive and household appliances industry – thus the company is one of the leading suppliers in the automotive industry. Hutchinson’s aim is to respond to the needs of its Clients as they arise, using the most advanced tools, technologies and research, and in partnership-based cooperation with research institutes and universities. The company invests around 5% of its annual budget in this area.

It employs 3,500 persons in all its facilities in Łódź. In its recruitment processes the company seeks qualified employees with practical experience in a demanding production facility with a large machinery stock and able to work in difficult conditions.

DELL Products (Poland) Sp. z o.o.

Dell company is one of the most recognised hardware producers globally. It was set up in 1984 in the United States and made its name primarily with its unique solution consisting in bypassing intermediaries in the process of delivering the device to the customer, and their computers are mostly delivered from the production facility directly to the customer.

At present the company provides its customers also with the possibility of constructing a device adjusted to their individual needs, from the internal elements right to the colour of the casing, and the customer may track the subsequent production and delivery stages.

Dell Products employs now 850 persons in its structures in Łódź, and it is mainly interested in professional profiles connected with knowledge in the area of production, IT, engineering and material logistics.

The company runs also its flagship career programme – Dell Academy – a traineeship programme for graduates and students in the last year of their studies at the Polish higher education institutions.

AMCOR

An Australian company, one of the largest manufacturers of packaging, mainly for the tobacco, FMCG, medical and pharmaceutical industry. In Poland the company has four facilities – three in Łódź and one in Złotów (Wielkopolska Province).

One of the factories in Łódź belongs to the Tobacco product group and manufactures mainly packaging for the tobacco industry – it is one of the largest ones worldwide owned by this investor, it features two modern production floors and three warehouses. The remaining facilities belong to the Flexibles group, and produce mainly plastic packaging for the food industry. In three Amcor facilities in Łódź there are around 1 thousand employees.

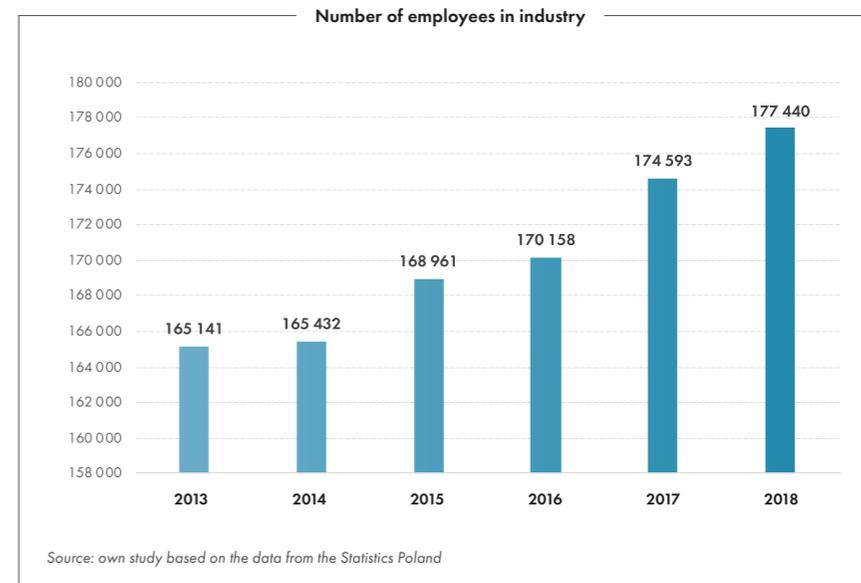
7.03 Employment and salaries in the production sector

The dynamics of employment observed during the last five years on the Łódź market reflects the general trend visible in Poland.

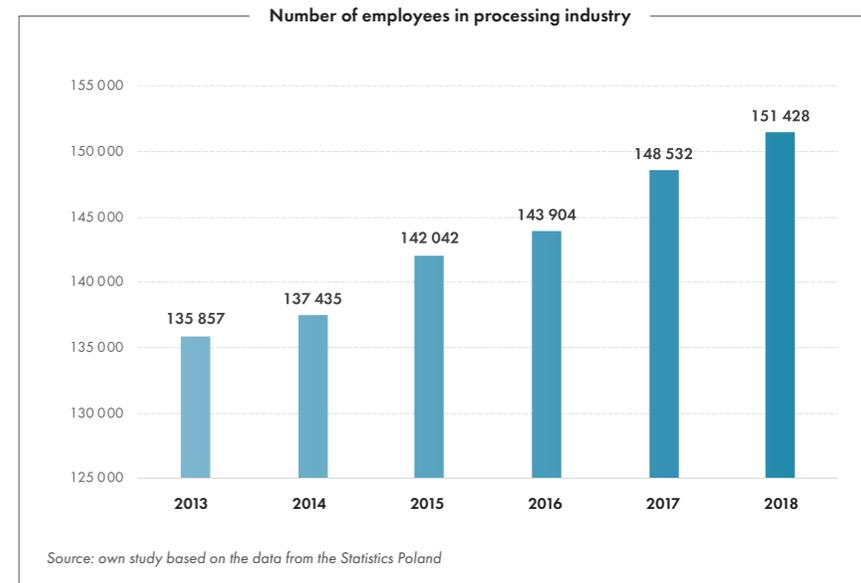
When analysing the data presented below, we may notice that – apart from year 2016 which was particularly difficult for the Polish economy – the trend was considerably marked by growth, and this situation continued until 2018 when a slight drop was recorded. The Statistics Poland (GUS) predicts that the growth trend will persist, although when looking at the global automotive market one may reasonably fear some stagnation.

In the recent years a dynamic increase in employment in production logistics could be observed, mainly due to the corresponding trends on the side of the production industry, which acts as its support and complementary element. The growth in employment will probably continue at the stable level, despite the threats resulting from digitalisation and process automation in the industry.

Data for the Łódź region – industry in total



Data for the Łódź region – processing industry (one of the components of "industry in total")



The trend concerning the dynamics of salaries in the Łódź region is similar to the general situation on the market in Poland. Salaries have been growing steadily for the recent years regardless of the industry, while a particularly dynamic growth can be observed in the production industry, among qualified employees with unique skills. The growth of salaries usually ranges from 6 to 7.5%. The growth of salaries is considerably more visible than the growth in employment, which is related with the difficulties in maintaining high supply of work. The data were collected and prepared based on the experience of Antal consultants and the market research conducted by the Antal divisions.

ŁÓDŹ	2019		2018		2017		2016		2015	
	min.	max.	min.	max.	min.	max.	min.	max.	min.	max.
Production Worker	4 000	5 000	3 000	5 000	2 600	4 800	2 500	4 500	2 300	4 000
Warehouseman	4 000	5 000	2 400	4 000	2 300	3 800	2 300	3 500	2 100	3 300
Shift Manager	4 600	9 000	3 800	7 500	3 800	6 900	3 500	6 500	3 400	6 000
Production Engineer / Process Engineer	7 000	12 000	6 000	8 000	5 500	8 000	5 000	7 500	5 000	7 000
Quality Engineer	7 000	11 000	6 800	10 000	6 500	9 700	6 000	8 600	5 500	7 000
Logistics Specialist	6 000	8 000	5 500	8 000	3 500	6 200	3 500	6 000	3 500	5 800
Warehouse Manager	8 000	14 000	7 500	12 000	7 000	10 000	6 800	9 000	6 500	8 500
Production Manager	10 000	15 000	8 500	12 000	7 500	10 000	7 000	9 600	6 800	9 000
WARSAW	2019		2018		2017		2016		2015	
Job position	min.	max.	min.	max.	min.	max.	min.	max.	min.	max.
Production Worker	3 000	6 000	2 800	5 600	2 600	5 400	2 500	5 000	2 300	4 600
Warehouseman	3 000	5 000	2 800	4 600	2 600	4 300	2 500	4 000	2 300	3 500
Shift Manager	4 600	8 000	4 500	7 600	4 300	7 400	4 200	7 000	4 000	6 700
Production Engineer / Process Engineer	6 500	11 000	6 000	10 000	5 500	9 500	5 200	9 000	5 000	8 500
Quality Engineer	6 500	10 000	6 000	9 500	5 500	9 000	5 200	8 500	5 000	8 000
Logistics Specialist	6 000	8 500	5 800	8 000	5 600	7 600	5 200	7 000	4 800	6 800
Warehouse Manager	11 000	14 000	10 000	13 000	9 700	10 000	8 500	9 500	6 500	8 000
Production Manager	10 000	15 000	9 500	13 000	9 000	12 000	8 500	11 500	8 000	10 000
POZNAŃ	2019		2018		2017		2016		2015	
Job position	min.	max.	min.	max.	min.	max.	min.	max.	min.	max.
Production Worker	3 000	5 800	2 850	5 510	2 700	5 200	2 570	4 975	2 450	4 725
Warehouseman	2 500	5 000	2 375	4 750	2 250	4 500	2 150	4 280	2 000	4 050
Shift Manager	3 500	7 000	3 325	6 650	3 150	6 300	3 000	6 000	2 850	5 700
Production Engineer / Process Engineer	6 000	8 000	5 700	7 600	5 400	7 200	5 150	6 850	4 880	6 500

Quality Engineer	6 000	8 000	5 700	7 600	5 400	7 200	5 150	6 850	4 880	6 500
Logistics Specialist	5 500	8 000	5 225	7 600	4 950	7 200	4 715	6 850	4 480	6 500
Warehouse Manager	10 000	13 000	9 500	12 350	9 025	11 700	8 575	11 150	8 150	10 600
Production Manager	11 000	16 000	10 450	15 200	9 900	14 440	9 400	13 700	8 900	13 000
WROCLAW	2019		2018		2017		2016		2015	
Job position	min.	max.	min.	max.	min.	max.	min.	max.	min.	max.
Production Worker	3 200	5 800	2 250	3 800	2 250	3 000	2 000	3 000	2 000	2 250
Warehouseman	2 500	4 000	2 250	3 500	2 200	3 000	2 000	3 000	2 000	2 700
Shift Manager	3 800	7 500	3 000	5 000	3 000	5 000	2 500	4 000	2 250	3 500
Production Engineer / Process Engineer	6 000	10 000	5 500	7 000	5 500	7 000	3 500	5 500	3 500	4 500
Quality Engineer	6 500	8 500	4 500	7 000	4 300	7 000	4 000	7 000	3 000	4 500
Logistics Specialist	6 000	9 000	5 500	7 500	4 000	6 000	3 500	5 000	3 000	4 500
Warehouse Manager	10 000	13 000	7 000	11 000	7 000	11 000	5 000	10 000	5 000	10 000
Production Manager	9 000	17 000	9 000	15 000	6 000	11 000	5 000	10 000	5 000	10 000
LUBLIN	2019		2018		2017		2016		2015	
Job position	min.	max.	min.	max.	min.	max.	min.	max.	min.	max.
Production Worker	4 100	4 500	3 890	4 270	3 690	4 000	3 500	3 800	3 300	3 600
Warehouseman	3 000	4 500	2 850	4 270	2 700	4 000	2 550	3 800	2 450	3 600
Shift Manager	4 300	6 000	4 000	5 700	3 850	5 400	3 700	5 150	3 500	4 850
Production Engineer / Process Engineer	6 000	10 000	5 700	9 500	5 400	9 000	5 150	8 550	4 800	8 150
Quality Engineer	5 200	10 000	4 900	9 500	4 600	9 000	4 400	8 550	4 250	8 150
Logistics Specialist	4 400	6 000	4 200	5 700	3 900	5 400	3 700	5 150	3 500	4 850
Warehouse Manager	6 700	9 000	6 400	8 500	6 000	8 000	5 700	7 600	5 400	7 200
Production Manager	9 000	14 000	8 500	13 300	8 000	12 600	7 600	12 000	7 200	11 400
SZCZECIN	2019		2018		2017		2016		2015	
Job position	min.	max.	min.	max.	min.	max.	min.	max.	min.	max.
Production Worker	3 500	5 000	3 300	4 700	3 200	4 600	3 000	4 200	2 900	4 000
Warehouseman	3 500	5 500	3 300	5 200	3 200	4 900	3 000	4 800	2 900	4 400
Shift Manager	5 000	9 000	4 700	8 600	4 600	8 100	4 200	7 700	4 000	7 300
Production Engineer / Process Engineer	5 000	10 500	4 700	9 900	4 600	9 400	4 200	9 000	4 000	8 500
Quality Engineer	3 000	6 000	2 900	5 700	2 700	5 400	2 600	5 100	2 400	4 800
Logistics Specialist	3 500	7 500	3 300	7 200	3 200	6 800	3 000	6 500	2 900	6 100
Warehouse Manager	7 000	12 000	6 600	11 400	6 300	10 900	6 100	10 200	5 700	9 700
Production Manager	6 500	13 000	6 200	12 300	5 800	11 700	5 600	11 100	5 200	10 600

BRATISLAVA	2019		2018		2017		2016		2015	
Job position	min.	max.								
Production Worker	3 300	5 300	3 200	5 000	2 900	4 800	2 800	4 500	2 600	4 300
Warehouseman	3 300	5 300	3 200	5 000	2 900	4 800	2 800	4 500	2 600	4 300
Shift Manager	5 000	8 000	4 800	7 600	4 500	7 200	4 300	6 900	4 000	6 500
Production Engineer / Process Engineer	6 300	10 000	6 000	9 500	5 600	9 100	5 500	8 600	5 100	8 200
Quality Engineer	4 200	6 800	4 000	6 500	3 800	6 100	3 600	5 900	3 500	5 500
Logistics Specialist	4 600	7 300	4 400	7 000	4 100	6 600	4 000	6 300	3 700	6 000
Warehouse Manager	12 600	20 300	12 000	19 300	11 400	18 300	10 800	17 400	10 300	16 500
Production Manager	13 100	20 900	12 400	19 900	11 800	18 900	11 200	17 900	10 700	17 000
PRAGUE	2019		2018		2017		2016		2015	
Job position	min.	max.								
Production Worker	5 000	6 600	4 700	6 300	4 600	5 900	4 300	5 700	4 100	5 300
Warehouseman	5 000	6 600	4 600	6 300	4 600	5 900	4 300	5 700	4 100	5 300
Shift Manager	5 000	10 800	4 700	10 200	4 600	9 700	4 300	9 200	4 100	8 800
Production Engineer / Process Engineer	6 600	12 500	6 300	11 900	5 900	11 200	5 700	10 800	5 300	10 100
Quality Engineer	5 800	11 600	5 500	11 000	5 200	10 500	5 000	9 900	4 700	9 500
Logistics Specialist	5 000	7 500	4 600	7 100	4 600	6 800	4 300	6 400	4 100	6 100
Warehouse Manager	10 000	20 000	9 500	19 000	9 000	18 000	8 600	17 200	8 100	16 300
Production Manager	11 600	21 700	11 000	20 600	10 500	19 600	10 000	18 600	9 400	17 700
BUDAPEST	2019		2018		2017		2016		2015	
Job position	min.	max.								
Production Worker	2 900	4 000	2 755	3 800	2 617	3 610	2 486	3 429	2 362	3 258
Warehouseman	2 300	3 000	2 185	2 850	2 075	2 700	2 000	2 572	2 000	2 440
Shift Manager	3 400	4 500	3 230	4 275	3 060	4 060	2 915	3 860	2 770	3 670
Production Engineer / Process Engineer	5 800	7 700	5 500	7 315	5 200	6 950	4 975	6 600	4 725	6 200
Quality Engineer	5 400	7 700	5 130	7 315	4 875	6 950	4 630	6 600	4 400	6 200
Logistics Specialist	4 100	7 100	3 895	6 745	3 700	6 400	3 515	6 090	3 340	5 785
Warehouse Manager	9 000	11 200	8 550	10 640	8 120	10 100	7 715	9 600	7 330	9 100
Production Manager	12 300	16 100	11 685	15 200	11 100	14 400	10 545	13 680	10 015	13 000

7.04

Łódź Special Economic Zone³¹

The Special Economic Zone in Łódź is the area of 1 775 hectares divided into 45 sub-zones, where PLN 15 bn have been invested, 37 thousand jobs have been created and 327 work permits have been issued.

Choosing the business location in the Special Economic Zone in Łódź offers the following benefits for the company:

- high level of public aid (up to 55%)
- central part of Poland and Europe: a crossroads of A1 (E75 Helsinki – Athens) and A2 (E30 Berlin – Moscow) motorways, cargo railway connection between Łódź and Chengdu (China)
- valuable and efficient contacts with the local authorities and offices responsible for investor services, which speeds up many preparatory processes
- cooperation with higher education institutions and technical higher education schools (including: supported classes, vocational courses, popularisation of dual education, cooperation with the Centre for Continued Education in Modern Technologies)

In the following cases it is possible to apply for support from the Ministry of Economy:

- setting up a new company
- increasing the production efficiency of an already existing company
- diversification of production through introduction of new products
- a fundamental change in the production process in an already existing company

Aid from a public institution consists primarily in an exemption from the corporate income tax, or from personal income tax in the case of individuals conducting business activity, in relation to business activity conducted based on the aid decision awarded to the organisation upon its application to implement an investment project in Poland, regardless whether such activity is conducted on public or private land.

The main types of business activity supported by the relevant ministry include:

- production
- BPO/SSC/IT
- R&D (B&R)

In order to be awarded support the investor has to meet specific quantitative and qualitative criteria presented beforehand. The quantitative criterion concerns the minimum amount of investment expenses that an entrepreneur has to make in order to receive support. The qualitative criteria are much more complex and concern many aspects of the company's operations, its impact on the market and on the environment.

³¹ Source: <https://sse.lodz.pl/>

The business perspective

Ewelina Weżgowska-Bryndza

HR RESOURCE MANAGER
RESPONSIBLE FOR THE DEVELOPMENT OF ENGINEERING CENTRE

In 2017 a new investment was launched in Łódź, connected with the research and development centre that brings together specialists in designing active safety systems for the automotive industry.

This decision was made mainly considering the attractive location in the centre of Poland but also the distance from the main Engineering Centre of ZF in Częstochowa. With this new location we were able to diversify our actions on the labour market.

An additional argument in favour of this location was the very dynamic activity of the Łódź University of Technology, and in particular its Faculty of Electrical, Electronic, Computer and Control Engineering.

One of the advantages of this region that is worth underlining is the cooperation with the City of Łódź Office which is very active in supporting business and its promotion in the region.

The Office runs numerous programmes that are actively implemented and it is open to cooperation.

One example of such programme is "The Young in Łódź" project that resulted in a campaign promoting the workplaces in the region and organisation of paid traineeships for the best candidates.

Łódź in the eyes of employees

Amit Lath

CEO SHARD GROUP OF COMPANIES
(PRODUCTION SECTOR)

I moved to Łódź due to business reasons and as soon as I got married my wife moved immediately from India. There are always challenges when you move to a new city – but, overall, we overcame those small problems as the city was friendly. I personally feel as follows: "The past is Krakow | The present is Warsaw | The future is Łódź."

It's better to invest in the future so that one has long term sustainability. Łódź is a friendly city for families – it is safe and easy to travel from one end to another, for example. The challenges faced by foreigners are especially at hospitals where they don't speak English – it's a huge stress for any expat.

Norberto Adrian Sanso Torre

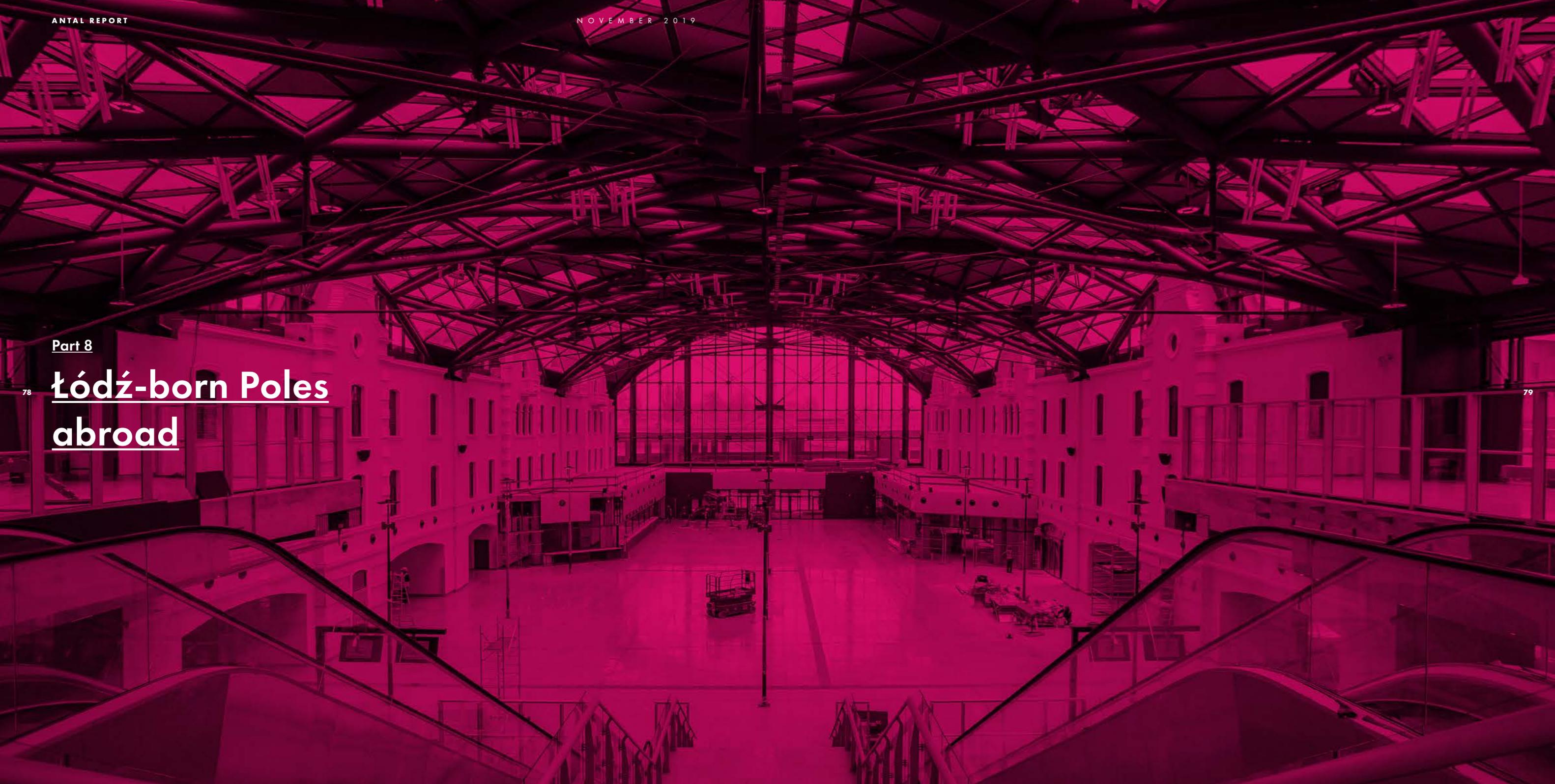
SENIOR PROCESS LEAD FOR FAURECIA AUTOMOTIVE

I have moved to Łódź upon the company initiative, they paid for the tickets and gave me accommodation, I was alone. Łódź is a good city to live in, it is in constant development, there are universities, companies offer a lot of positions, it is a cultural city, with plenty of activities.

Łódź should solve its problem with alcoholic persons, the homeless, because sometimes foreigners complain about aggressive behaviours. I guess it is a good place to live in, despite some small details.

Part 8

Łódź-born Poles
abroad



Łódź-born Poles abroad

According to Facebook, the largest social media website, in the EU countries (excluding Poland) there live and work over 55 thousand Łódź-born persons who chose to emigrate, mainly for economic reasons.

In October 2019, a survey was conducted among 500 persons born in Łódź, in order to answer the following question: does the Łódź job market offer job prospects for persons speaking foreign languages (and sought after by employers based in Łódź) that would be attractive enough to encourage them to return to Poland?

The aim of the survey was also to analyse the command of foreign languages among Łódź-born persons living abroad.

48% of respondents were interested in returning to Łódź and further 39% were thinking about such step. Only 12% of respondents definitively did not plan to return to their home city.

40,5% of Łódź-born persons who took part in the survey live in Germany, 25.1% in Holland, 8.9% in Norway, 7.3% in France and 6,9% in Sweden. Those who were most eager to return from emigration are those presently living in Holland and in Germany.

The reasons for returning to Łódź that were mentioned most often include a proposal of attractive salary (61,7%), the possibility of professional growth (37,2%) and family matters (34,4%). According to participants in the survey, an attractive salary that would encourage them to return to Łódź would be PLN 5 000 – 8 000 (43%), and for 32% of respondents that amount would be in the range of PLN 3 500 – 5 000.

73,1% of respondents declare they speak English, 44,1% – German, 20,4% – Dutch, 23,3% – Russian, 14,3% – French, and 9% for both Norwegian and Swedish.

The declarations on the command of selected foreign languages have been presented in detail in the table on the right side.

48% of respondents are interested in returning to Łódź

39% of respondents are thinking about returning to Łódź

12% of respondents definitively do not plan to return

CURRENT PLACE OF RESIDENT OF ŁÓDŹ-BORN PERSONS:

40,5%
German

25,1%
Holland

8,9%
Norway

7,3%
France

6,9%
Sweden

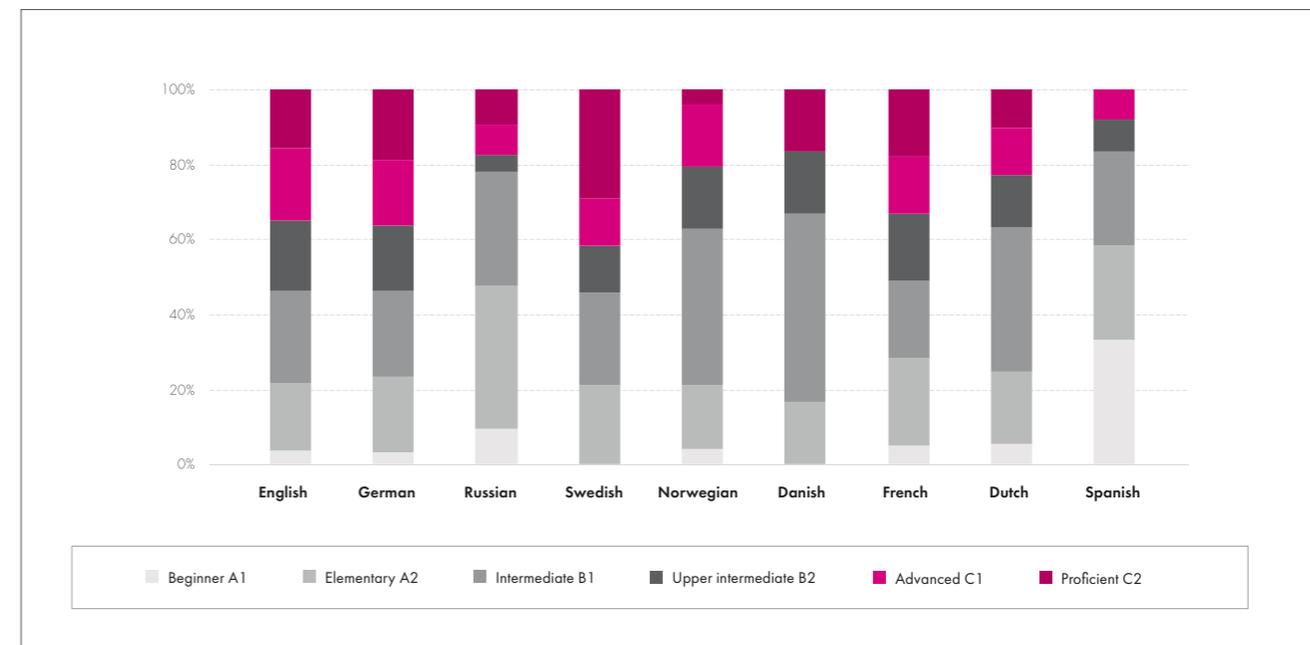
DECLARED REASONS TO RETURN TO ŁÓDŹ:

61,7%
the proposal of attractive salary

37,2%
the possibility of professional growth

34,4%
family matters

The declarations on the command of selected foreign languages



Command of selected foreign languages

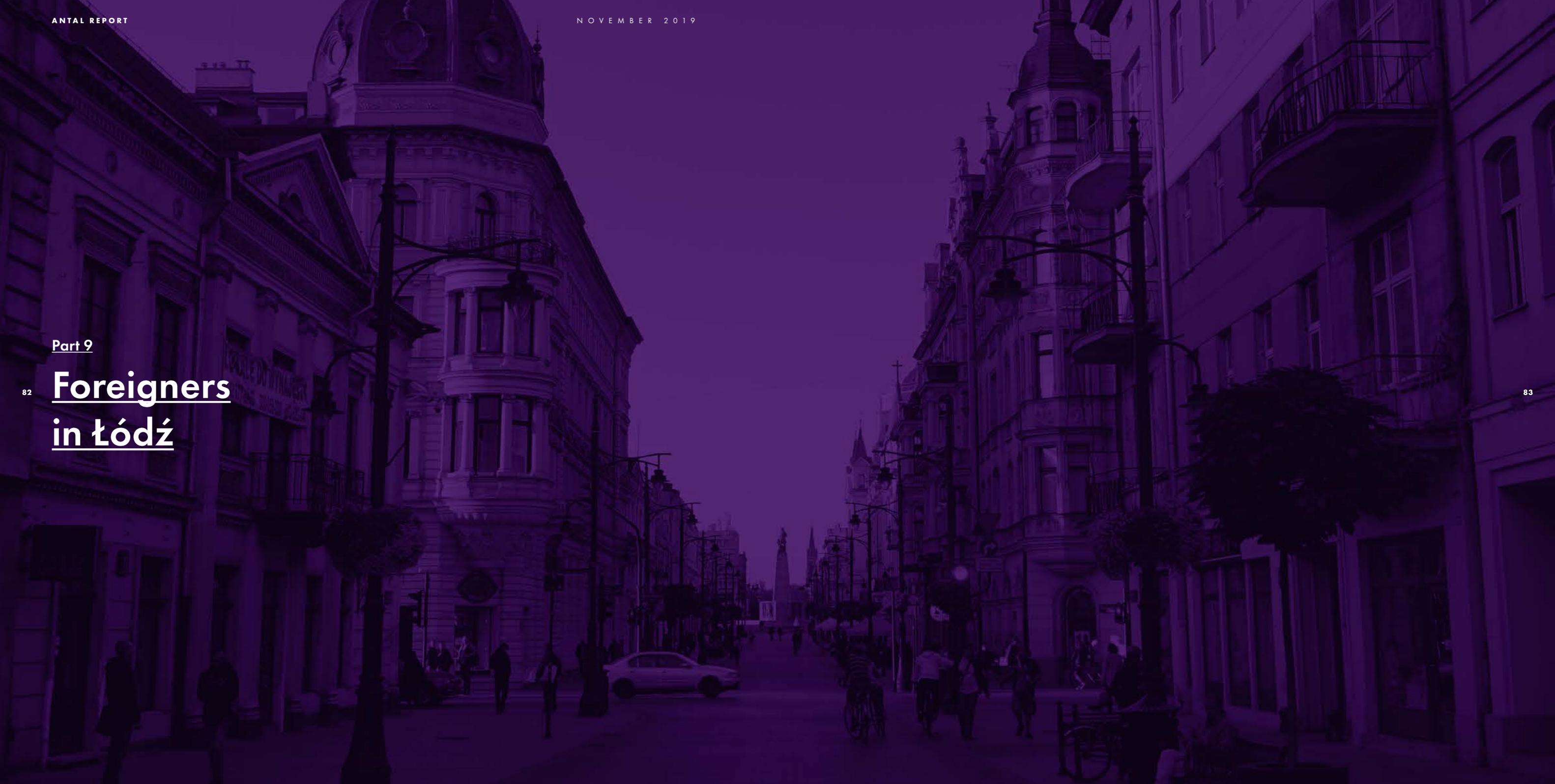
Language	Beginner A1	Elementary A2	Intermediate B1	Upper intermediate B2	Advanced C1	Proficient C2
English	3,5%	18,0%	24,5%	19,0%	19,0%	16,0%
German	3,3%	19,8%	23,1%	17,4%	17,4%	19,0%
Russian	9,5%	38,1%	30,2%	4,8%	7,9%	9,5%
Swedish	0,0%	20,8%	25,0%	12,5%	12,5%	29,2%
Norwegian	4,2%	16,7%	41,7%	16,7%	16,7%	4,2%
Danish	0,0%	16,7%	50,0%	16,7%	0,0%	16,7%
French	5,1%	23,1%	20,5%	17,9%	15,4%	17,9%
Dutch	5,3%	19,3%	38,6%	14,0%	12,3%	10,5%
Spanish	33,3%	25,0%	25,0%	8,3%	8,3%	0,0%

Part 9

Foreigners in Łódź

82

83



9.01 Statistical data on foreigners employed in Łódź

Below there are statistical data on foreigners working in Łódź, broken down by labour groups and professions. What should be underlined as regards professions is the considerable growth in the issued work permits in the group of IT specialists (both in 2017 compared to 2016, and in 2018 compared to 2017). In 2018, among professional groups **the increase in the issued work permits was observed among specialists, technicians and other mid-level personnel, industrial workers and other workers, plant and machine operators and assemblers, as well as workers performing menial work.**

Work permits for foreigners in the Łódź Province by employee groups and professions in 2016-2018 (in absolute numbers and as a percentage)								
		2016		2017		2018		
ISSUED PERMITS FOR WORK IN TOTAL		3 577		19 345		32 423		
Classification of work permits by professional groups		absolute number	% of total issued permits	absolute number	% of total issued permits	absolute number	% of total issued permits	
84 Groups based on the Polish Classification of Occupations and Specialisations	authorities, representatives, senior officials and managers			101	0,52%	91	0,28%	
	specialists	456	12,75%	711	3,68%	1 187	3,66%	
	technicians and other mid-level personnel			(data for the labour group: managers, advisers, experts)	915	4,73%	1 393	4,30%
	office workers			1 293	6,68%	3 006	9,27%	
	Service and sales workers			699	3,61%	636	1,96%	
	farmers, gardeners, foresters and fishermen	2 545	71,15%	163	0,84%	24	0,07%	
	industrial workers and craftsmen			(data for the labour group: skilled workers)	4 214	21,78%	9 347	28,83%
	plant and machine operators and assemblers			4 976	25,72%	6 012	18,54%	
workers performing menial work	283	7,91%	6 270	32,41%	10 727	33,08%		
By groups of professions	IT specialists	28	0,78%	368	1,90%	899	2,77%	
	lawyers	0	0%	0	0%	0	0%	
	artistic professions	1	0,03%	14	0,07%	13	0,04%	
	medical professions	15	0,42%	23	0,12%	30	0,09%	
	teaching professions	26	0,73%	17	0,09%	20	0,06%	

Source: Report of the Ministry of Family, Labour and Social Policy (collective data for years 2016, 2017 and 2018).

9.02 Migration experience

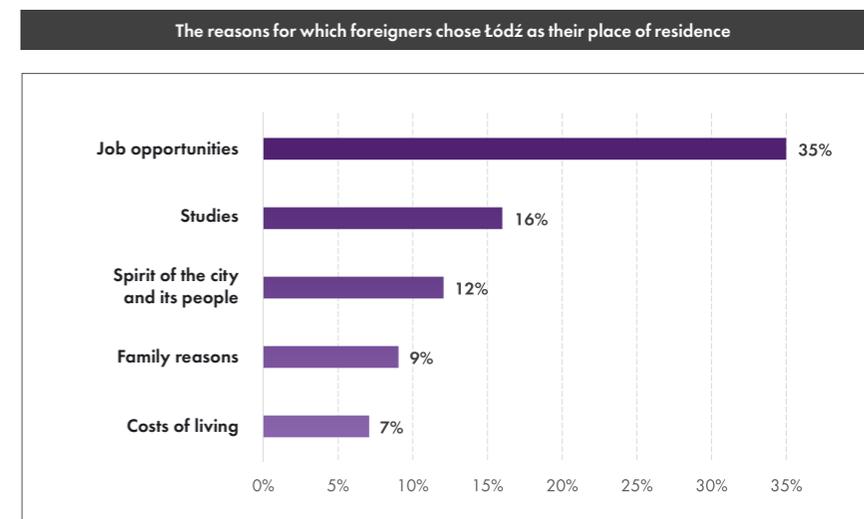
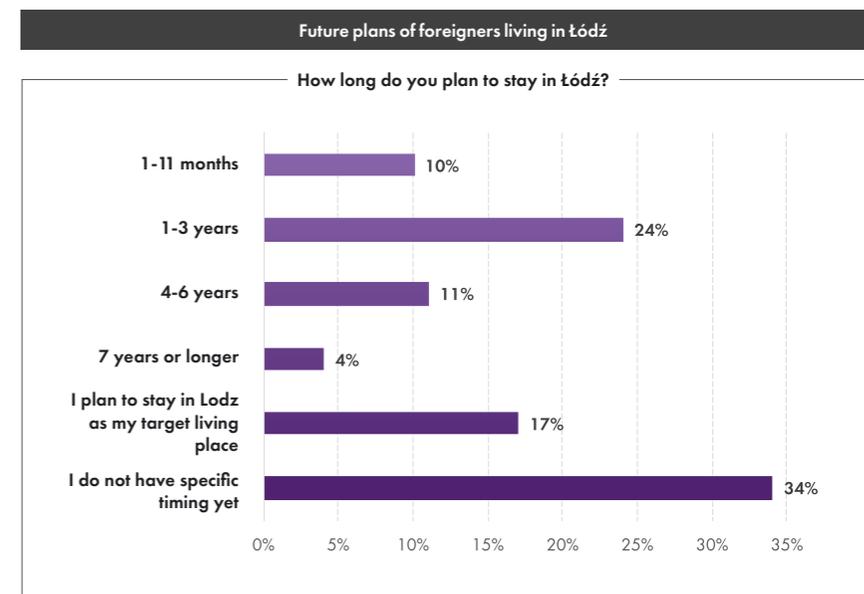
A research made by Antal in October 2019, with 302 foreigners as participants, shows that **37% of respondents relocated also to another country before coming to Poland.** For 63% of them Poland was the first immigration experience. The most common relocation model is immigration without the family members – this was declared by 59% of respondents. Also, a majority (80%) of persons who decided to come to Poland for work without their families do not plan to invite their families to join them in Łódź.

One in third foreigner (34%) living in Łódź has no clear plans as to their place of long-term residence. However, nearly one in five of them (17%) plans to live in Łódź permanently in the future. The remaining respondents perceive Łódź as the place of their temporary stay.

The reasons for which they chose Łódź as their place of residence are varied and usually there is more than one. The research shows that among the main reasons there are the following categories: Job opportunities (35%), Studies (16%), Spirit of the city and its people (12%), Family reasons (9%), Costs of living (7%).

Positive and negative aspects of living in Łódź as seen by foreigners

- + Low costs of living compared to salaries
- + High quality education
- + Spirit of the city
- + Friendly residents
- + Public transport
- + Green areas
- + City's convenient location
- + Shopping, culture
- + Good quality of life



Łódź in the eyes of foreigners

Mario Alberto Cueto

ARGENTINA

CURRENTLY EMPLOYED IN ŁÓDŹ IN SSC/BPO SECTOR
IN FOOD TECHNOLOGY DEPARTMENT

I decided to come to Łódź as it was the easiest for me to get a work permit and find a job here. When it comes to accommodation, I was able to rent a room quickly and in a convenient location so I have a walking distance to most of the places I'm interested in.

I enjoy Łódź because of its variety of restaurants and bars so always there is a place to hang out with friends. I really appreciate that I can find other Latin people and other foreigners here so even if I cannot speak fluent Polish, I can always find someone to communicate with.

Dilgam Sharifov

AZERBAIJAN

CURRENTLY EMPLOYED IN ŁÓDŹ IN IT SECTOR

I chose Łódź as my place to live first of all because the University of Łódź offered 50% discount on the tuition fee for students from my country, and secondly, the cost of living is lower here than in such cities as Warsaw, Cracow or Wrocław. I love green and calm cities and Łódź is one of them. This city is changing and developing and there are already some international

companies where foreigners can work as well. Also, if you don't like crowded cities like Warsaw, then you can choose Łódź which is not crowded but is not far from Warsaw.

I would recommend this place to relocate also because of the kind of people I meet here.

Rukudzo Chihota

ZIMBABWE

STUDENT OF UNIVERSITY OF ŁÓDŹ

Amongst all the other cities in Poland I chose Łódź as a place to stay because it is a great place to live when one is arriving to Poland for the first time. It is affordable, the environment is amazing and it is relatively close to the capital city if maybe a visit to an embassy or otherwise is needed. I would recommend Łódź as a place to relocate because it is less crowded than most cities

and staying in the central business centre (which would probably be near the place of work) is relatively affordable.

I think it would be the best place to stay with a family or spouse. It has amazing entertainment areas both for adults and children, zoos, parks, great theatres, museums and restaurants.

Artem Stelmakh

UKRAINE

CURRENTLY EMPLOYED IN ŁÓDŹ IN SALES DEPARTMENT

I've been living in Łódź for the fourth year and currently working as a sales specialist in a local middle-sized company. Łódź was chosen because of a work opportunity I found in this city. I highly recommend Łódź due to its fast development and growth of the local labour market. Many new vacancies alongside with new offices are appearing in the city. In my view, this will allow many foreigners to relocate and start/develop their careers here.

The main advantages of living and working in Łódź are a relatively low cost of living and the expanding labour market. This means that you need only modest funding to relocate here. Also, due to the numerous job opportunities, many might find this city a perfect option for getting their first work experience or promoting their careers. I believe these two are the most important reasons why I recommend this city.

About the authors

Antal is the leader in recruitment of professionals and managers and in human resource consultancy. The brand is present in 35 countries and has been operating in Poland since 1996.

Antal offices in Warsaw, Wrocław, Cracow, Poznań and Gdańsk carry out projects in Poland and abroad, for the biggest global and local companies from all industries.

We were one of the first recruitment companies on the Polish market to introduce a matrix-based team system and thus our consultants specialise in recruitment for both specific industries and job positions.

At present, Antal has 9 recruitment divisions and teams that advise companies on employee evaluation and development, employer branding and market analyses.

Our services

Our approach to the needs of employers is both flexible and comprehensive. We specialise in not only recruitment but also HR consultancy.

We offer services in the area of permanent recruitment, contract recruitment and RPO (Recruitment Process Outsourcing) as well as advanced solutions supporting recruitment and enhancing the employers' image, and also tools for employee development. We also conduct labour market research projects adjusted to the needs of our clients.

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General Information

- data on human resources in Łódź
- available office and warehouse areas
- necessary permits and decisions
- public assistance, information on investment funding



Organisation of meetings and cooperation with the office

- setting up a visit in the city
- meeting with the City Mayor
- meetings with Office representatives
- support at each stage of the investment process



Property

- support in selection location
- preparing an offer concerning available surface area and costs
- arranging visits with consulting companies, building owners



Support in company PR activities

- press conferences
- publishing news at www.invest.lodz.pl and in the office bulletin
- "Łódź creates workplaces" campaign
- "Youth in Łódź" programme
- presence in publications with economic promotion of the city



Recruitment support

- organising meetings with:
 - universities
 - career offices
 - recruitment agencies
 - employment offices

Useful contact details

City Of Łódź Office

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