



Focus on

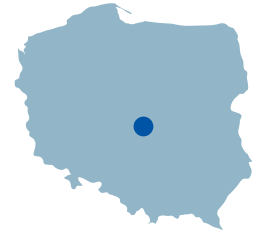
June 2014



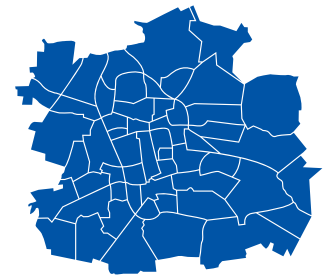
Łódź



Europe



Poland



Łódź

Investment attractiveness

Łódź is one of the few Polish cities with clearly defined BPO industry approach in cities development strategy. Central location in Poland, airport, close distance to two main highways and direct neighbourhood of Warsaw makes city of Łódź one of the most favourite location for BPO/SSC operation centres. Łódź is also the example of the city where citizens can develop the language skills. Since many years the city is running the "Multilingual Young Łódź Citizens" program, where the city is co-financing foreign language education courses. Main users of this program are outsourcing industry employees.

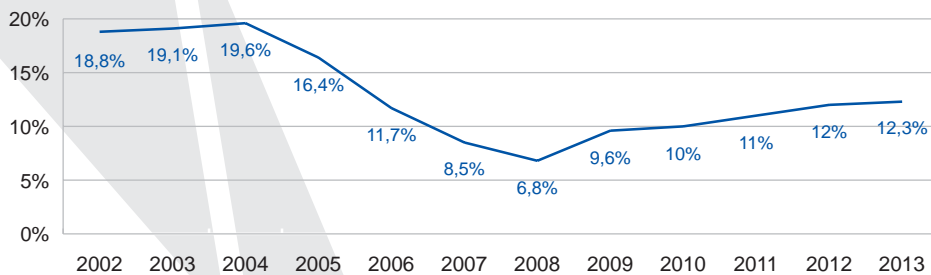
Since 2007 outsourcing industry is rapidly growing in Łódź. The city is the location of such international companies like Infosys, SouthWestern, HP GBS, Fujitsu, Tate&Lyle and many others. The city has very well performing ICT Cluster, where the members are both the ITO and ICT services providers as well as the technical university.

The city of Łódź is the host of many prestigious outsourcing events. In 2013 the city was hosting among many others the IVth ABSL annual conference and VIth European Economy Forum, where BPO was the main discussed subject.

Łódź Special Economy Zone is one of the fastest growing and best performing economy zones in Poland, which is also co-operating and supporting development of the outsourcing industry.

Welcome to Focus on Łódź!

Unemployment rate



Town area:

293.25 sq km

Population:

711,332

Professional activity ratio with regard to population in the age of 15 or more according to the level of education

higher	79,5%
post-secondary and vocational secondary	67,5%
secondary of general education	53,6%
vocational	67,8%
secondary junior (gymnasium), primary, lower	21,4%

Education

Number of kindergartens: **205**



Total number of schools: **169**

data from 2011/2012 including primary schools, gymnasiums, post-gymnasium schools, post-secondary schools



Number of language schools: **275**

Number of colleges and universities: **22**

Public colleges and universities: **6**
Private colleges and universities: **16**

5 schools of tertiary education offer philological studies

Students	IN TOTAL	Graduates
2,715	Management	3,742
4,053	Philology	1,172
8,579	Teacher Training and Education science	4,038
4,199	Finance and accounting	1,273
2,634	Administration	1,435
3,060	Law	343
6,291	Computer Science	1,337
3,507	Logistics	916
2,094	Economics	616
574	Political Science	303
960	Mechanics and Mechanical Engineering	151
1,456	Management and Product Engineering	261
1,218	International relations	600
1,193	Psychology	136
695	International economic relations	139
719	Cultural studies	121
762	Automatics and robotics	119
815	Sociology	394
242	Computer science and econometrics	61
1,463	Mathematics	341
852	Electronics and telecommunications	182
50,877	Other fields of study	10,032



University of **LODZ**

University of Lodz:

English, Spanish, Russian, Slavic, Italian, Classic philology.



Akademia Humanistyczno-Ekonomiczna:

English and German philology.



Społeczna Akademia Nauk:

English philology.



Wyższa Szkoła Stosunków Międzynarodowych w Łodzi:

English, German, Spanish, Italian, Japanese philology.



"Wschód- Zachód" Szkoła Wyższa im. Henryka Józwiaka w Łodzi:

English philology.

Transportation

Łódź Airport

Number of arrivals and departures



Year	Total passenger traffic	Flight operations	Regular flights	Charter flights
2013	353,633	2,763	317,596	34,523
2012	462,931	3,779	409,777	45,735
2011	389,286	3,044	340,195	49,091
2010	393,942	3,268	304,078	89,864
2009	308,700	4,180	258,857	49,843



Accessibility of motorways:
Motorways A1 and A2



Car rentals: **53**



Number of taxi companies: **7**



Number of bus lines:
82 day bus lines + 8 night bus lines



Number of tram lines:
22 day tram lines



Railway/number of connections
to other cities: **30**

Flight destinations: **15**

Regular flights:

Dublin DUB (Ireland)
East Midlands EMA (UK)
Londyn Stansted STN (UK)
Monachium MUC (Germany)
Oslo Rygge RYG (Norway)

Charter flights:

Antalya (Turkey)
Burgas (Bulgaria)
Chania (Greece)
Enfidha (Tunisia)
Hurgada (Egypt)
Kos (Greece)
Monastyr (Tunisia)
Rodos (Greece)
Sharm El Sheikh (Egypt)
Zakynthos (Greece)

Distance from Łódź to other cities in kilometres

Warsaw	Wroclaw	Gdansk	Szczecin	Poznan	Katowice	Cracow	Pzeszow	Lublin	Berlin	Hamburg	Prague	Minsk	Kiev	Moscow	Vilnius
130	216	343	455	202	194	238	317	287	465	847	498	666	887	1369	578

Business

Number of business entities in total:

63,765

Supply of office space	
total existing area of offices of A and B+ class	297,500 sqm
total area of offices of A and B+ class under construction	37,300 sqm
total planned area of offices of A and B+ class	468,300 sqm
average rent of A class offices in Łódź	10,5 - 11,5 EUR

Warehouse space	
total existing warehouse space	1,065,000 sqm
total warehouse space under construction	17,500 sqm
total planned warehouse space	517,500 sqm
average rent of warehouse spaces in Łódź and in the neighbourhood	2,9 - 3,4 EUR

Class	Number of buildings	Total space
A	8	68,100 sqm
B+	7	42,600 sqm
B	43	186,800 sqm

Examples of office buildings

Year	Status	Building	Address	Owner	Area	Car park places	Certificate
2010 / 2015	EX / UC	University Business Park	Wólczarńska 178	GTC	18,700 / 18,800 sqm	300	GreenBuilding
2012 / 2013	EX	Green Horizon	Pomorska 106	Skanska Property Poland	29,400 sqm	392	LEED Gold (precertified)
2008	EX	RED Tower	Piotrkowska 148/150	Arka BZ WBK	13,800 sqm	30	
2010	EX	Sterlinga Business Centre	Sterlinga 8a	Hines	12,800 sqm	178	BREEAM Good
2009	EX	Cross Point	Al. Rydza Smiglego 20	Mermaid Properties	12,500 sqm	175	
2009	EX	Textorial Park	Fabryczna 17	St. Paul's Developments Polska	11,600 sqm	237	BREEAM Good
2001	EX	Orion	Sienkiewicza 85/87	Catalyst Capital	9,200 sqm	125	
2011	EX	Park Biznesu Teofilów - I	Traktorowa 141/143	ARKA BZWBK	8,700 sqm	134	
2006	EX	Centrum Targowa 35	Dobrowczyków 32/34	Domena	8,700 sqm	15	
2006	EX	"Łódź 1	Al. Piłsudskiego 20/22	SEB Asset Management	8,400 sqm	130	

Source: CBRE April 1st 2014 / EX - existing building, UC - building under construction

Examples of warehouse buildings

Building	City	Developer	Existing area	Area under construction	Planned area
Segro Logistics Park Stryków	Stryków	Segro	187,700 sqm	3,500 sqm	92,400 sqm
Panattoni Park Łódź East	Łódź	Panattoni	151,600 sqm	8,300 sqm	0 sqm
Logistic City Piotrków Trybunalski	Piotrków Trybunalski	Emerson Polska	135,000 sqm	0 sqm	135,000 sqm
Panattoni Park Stryków	Stryków	Panattoni	107,100 sqm	0 sqm	0 sqm
Prologis Park Piotrków I	Piotrków Trybunalski	Prologis	101,000 sqm	0 sqm	0 sqm
Europolis Park Poland Central	Wola Bykowska	CA Immo	75,000 sqm	0 sqm	0 sqm

Source: CBRE April 1st 2014

Events in Łódź

European Economy Forum
 Intelligent City Management
 Interbud Fairs
 Academic Job Fairs
 INTERTELECOM – International Electronic Communication Fairs
 IT Career Fairs
 MOBILIZATION
 IT Professionals test
 International Business Symposium

Institutions supporting entrepreneurship

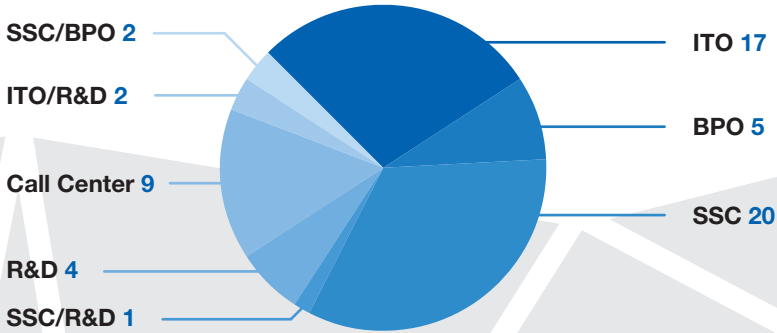
Among business - related institutions (except for scientific and research institutes) which influence economic development of the region, there are the following units:

Klub 500 ■ Lewiatan ■ Business Center Club ■ Lodz Special Economy Zone ■ Lodz Regional Development Agency ■ Young Entrepreneurship Incubator ■ Regional Lodz Education – Technology Park ■ Lodz Chamber of Commerce ■ ABSL ■ Central Poland ICT Cluster ■ Alliance Francaise ■ Technology Transfer Centre ■ IT Technology Centre ■ Innovation Centre of the University of Lodz ■ Lodz Entrepreneurship Development Foundation ■ The Entrepreneurship Accelerator and Incubator of the University of Lodz ■ Artinkubator ■ Entrepreneurship Incubator of Incubator Foundation in Lodz

Business: Outsourcing

Innovative business services

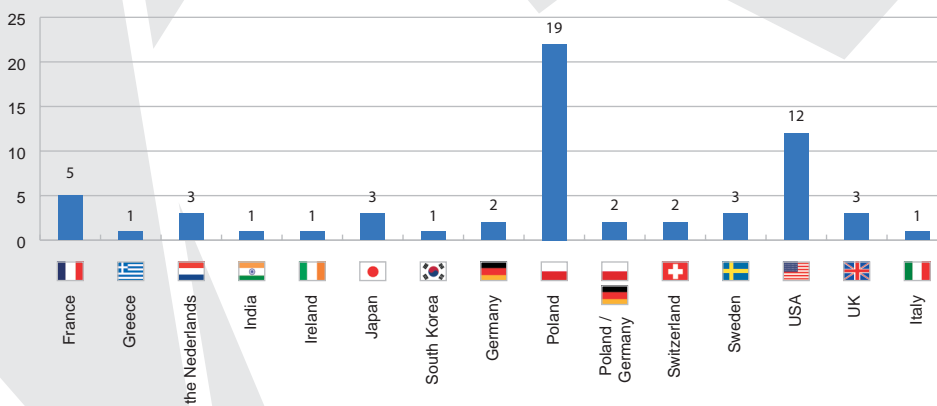
Operating activity



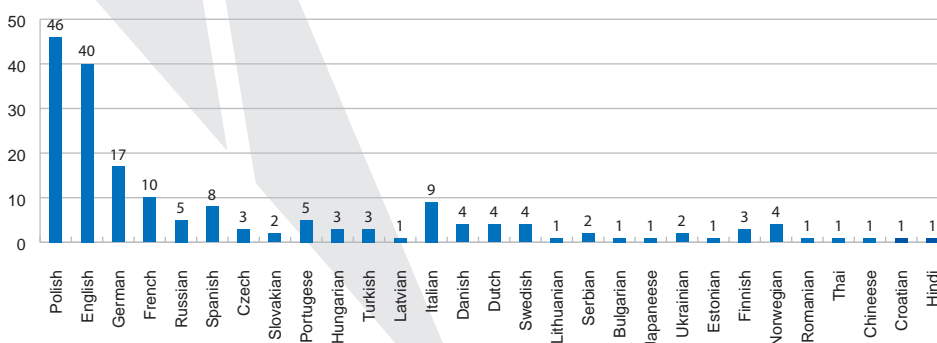
Number of investments annually



Number of investments - country of origin



Outsourcing centres with foreign language services



Organisation/ business entity	Services provided
ABB	R&D
Accenture	ITO
AgreeYa Mobility I	ITO
AMG.net	ITO
Bank Pekao SA	SSC
Bluesoft	ITO
BMS	ITO / R&D
BSH	SSC / R&D
BSS - Business Support Solution S.A.	SSC / BPO
Cardif	Call Center
Ceri (with Commerzbank)	BPO
Citi Handlowy	R&D
Clariant	SSC
Comarch S.A.	ITO
Cybercom	ITO
Dalkia	SSC
DHL Express	Call Center
Dimar	Call Center
Ericpol Telecom	ITO
Faurecia	SSC
Fujitsu Services	ITO / R&D

Business: Outsourcing

Innovative business services

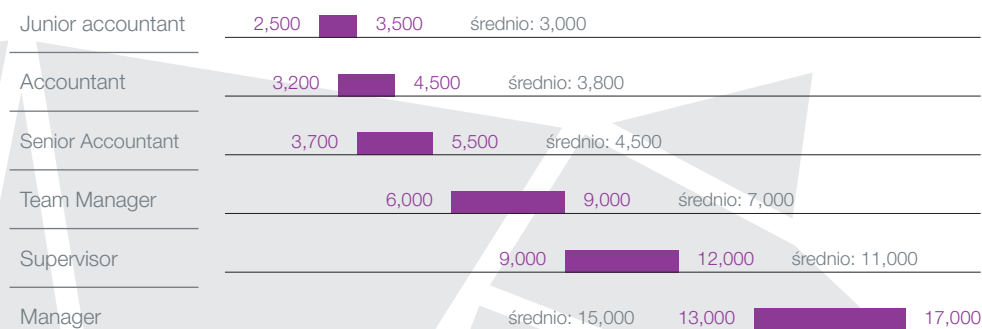
Organisation/business entity	Services provided
GE Power Controls	SSC
Hewlett-Packard	BPO
Indesit	SSC
Infosys	BPO
INTERsoft	ITO
LSI Software	ITO
MakoLab	ITO
mBank	SSC
McCormick	SSC
Mellon	Call Center
Mobica	ITO
Nordea Operation Center	SSC
PGE Obrót	SSC
Philips	SSC
PKO BP	SSC
Polkomtel	Call Center
Prudential	SSC
PTC	Call Center
PZU	SSC

Rule Financial	ITO
Samsung	R&D
Sanitec Kolo	SSC
Sii	ITO
SouthWestern	BPO
Symphony teleca	ITO
Takeda (Nycomed)	SSC
Target BPO	BPO
Tate&Lyle	SSC
Taxcare	SSC
Technitel	ITO
TELMON	Call Center
TomTom	R&D
TP S. A.	Call Center
Transition Technologies	ITO
Veolia	SSC
Voice	Call Center
Warta insurance	SSC
XEROX	SSC / BPO
ZETO	ITO

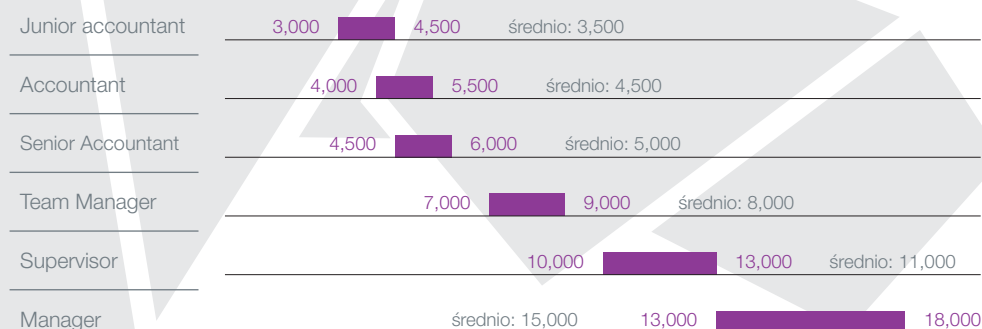
Salaries

Jobs - English speakers (PLN gross)

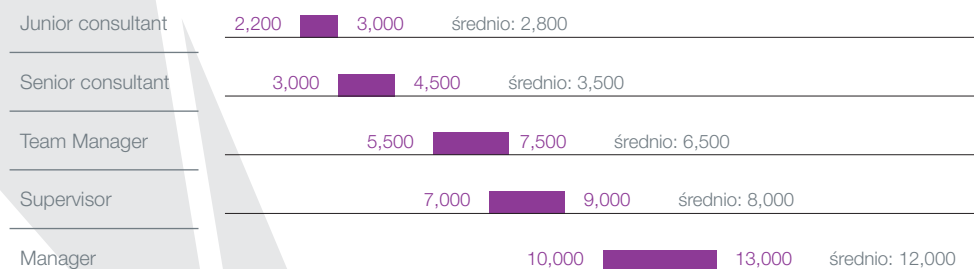
Payables Management / Receivables Management



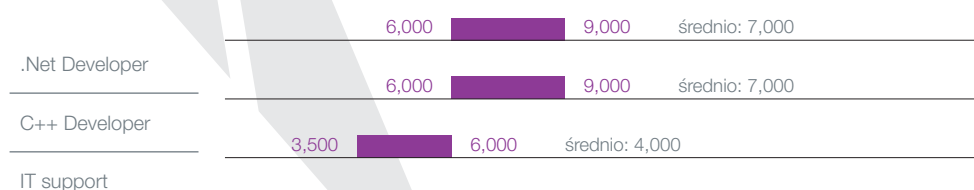
General Ledger



Call Center



IT



Jobs with other languages - average salaries (PLN gross)

German, French, Spanish, Italian, Russian	Dutch, Swedish
3,500	4,500
4,500	5,500
5,500	6,500
8,500	9,500
13,000	14,000
18,000	20,000

German, French, Spanish, Italian, Russian	Dutch, Swedish
4,000	4,500
5,500	6,000
7,000	8,000
9,500	11,000
13,000	14,000
18,000	20,000

German, French, Spanish, Italian, Russian	holenderski, szwedzki
3,400	3,700
4,000	4,500
8,000	8,500
9,500	11,000
14,000	16,000

Spanish, Italian, Russian	German, French
8,500	9,000
8,500	9,000
4,500	4,500

Culture / Entertainment / Recreation



Number of museums: **30**



Number of theatres: **16**



Number of art galleries: **42**



Number of cinemas: **10**



Festivals: **50**
+ **20 fashion events**
+ **events in Wytwórnia and Atlas Arena clubs**



Number of hotels: **26**
14 * 5 ******



Number of shopping malls: **29**



Number of restaurants/ clubs: **274**



Fairs: **21 fairs**

Sports facilities

6 stadiums
17 indoor swimming pools
42 sports fields
19 sports halls and gyms
3 bowling clubs
4 watering places
14 tennis courts
5 squash courts
4 climbing walls

Major events

Łódź Design Festival
Se-ma-for Film Festival
Lodz Four Cultur Festival
Soundedit - International Music Producers Festival
Tansman - Music Individuality Festival
Nice and Not Nice International Art Festival
Fashion Philosophy Fashion Week Poland
Comics and Games International Festival
Mediaschool – International Festival of Movie and Television Schools
Explorers Festival
Movies Music Festival

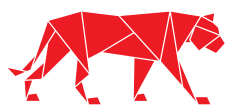
Conference facilities: **>25**

Hotel Ambassador Centrum
Hotel Ambassador Chojny
Hotel Andel's
Atlas Arena
Hotel Borowiecki
Hotel Campanile
Hotel Centrum

Double Tree by Hilton Łódź
Expo-Łódź
Hotel Focus
Forum 76. Business Centre
Golden Floor
Hotel Grand
Holiday Inn

Łódzka Specjalna Strefa Ekonomiczna
Hotel Novotel
Qubus hotel
Hotel Rubin
Technopark
Tabaco Hotel

Focus on Łódź prepared by



PROPROGRESSIO

in co-operation with



HAYS
Recruiting experts
worldwide

CBRE

 outsourcing
portal

Outsourcing&More



Polska Izba
Handlowo-Przemysłowa
we Francji  Chambre de Commerce
et d'Industrie Polonaise
en France

Scandinavian-Polish 
CHAMBER OF COMMERCE

Pro Progressio - foundation supporting growth and promotion of outsourcing industry in Poland. The foundation co-operates with the public and private sector as well as with the international organisations operating in the outsourcing sector.

Pro Progressio is closely related with outsourcing sector media that is with OutsourcingPortal and Outsourcing&More magazine.

Pro Progressio manages the Outsourcing Club, to which it invites business entities providing outsourcing services and organisations operating in direct environment of the sector. The club promotes and supports the development of the outsourcing activities, both in the area of services and production, furthermore, it facilitates the establishment of new contacts and increases the outsourcing brand awareness

Fundacja Pro Progressio T: +48 22 213 02 44
ul. Dolna 21b/40 E: info@proprogressio.pl
00-773 Warszawa W: www.proprogressio.pl

Members of the Outsourcing Club in Łódź:



 **Technitel**

 **Chudzik i Wspólnicy**
KANCELARIA PRAWNA

 **telmon**

 **SouthWestern**



SKANSKA

Kinnarps

 **randstad**



Addresses to the Investor Assistance Centres in Łódź

City of Lodz – Investors Support Office

104a Piotrkowska Str.
90-926 Łódź

T: +48 (42) 638 59 39
F: +48 (42) 638 59 40

e-mail: zoi_2@uml.lodz.pl
www.invest.lodz.pl

Investors and Exporters Support Centre – Marshal Office of the Lodz Voivodeship – Department of Enterprise

7/9 Moniuszki Str.
90-101 Łódź

e-mail: przedsiebiorczosc@lodzkie.pl