THE
WORLD STAGE

Five Cities or One Region:

The Business Case

MAN vs MACHINE
ASPIRE ANNUAL CONFERENCE

MEETING THE MOMENT

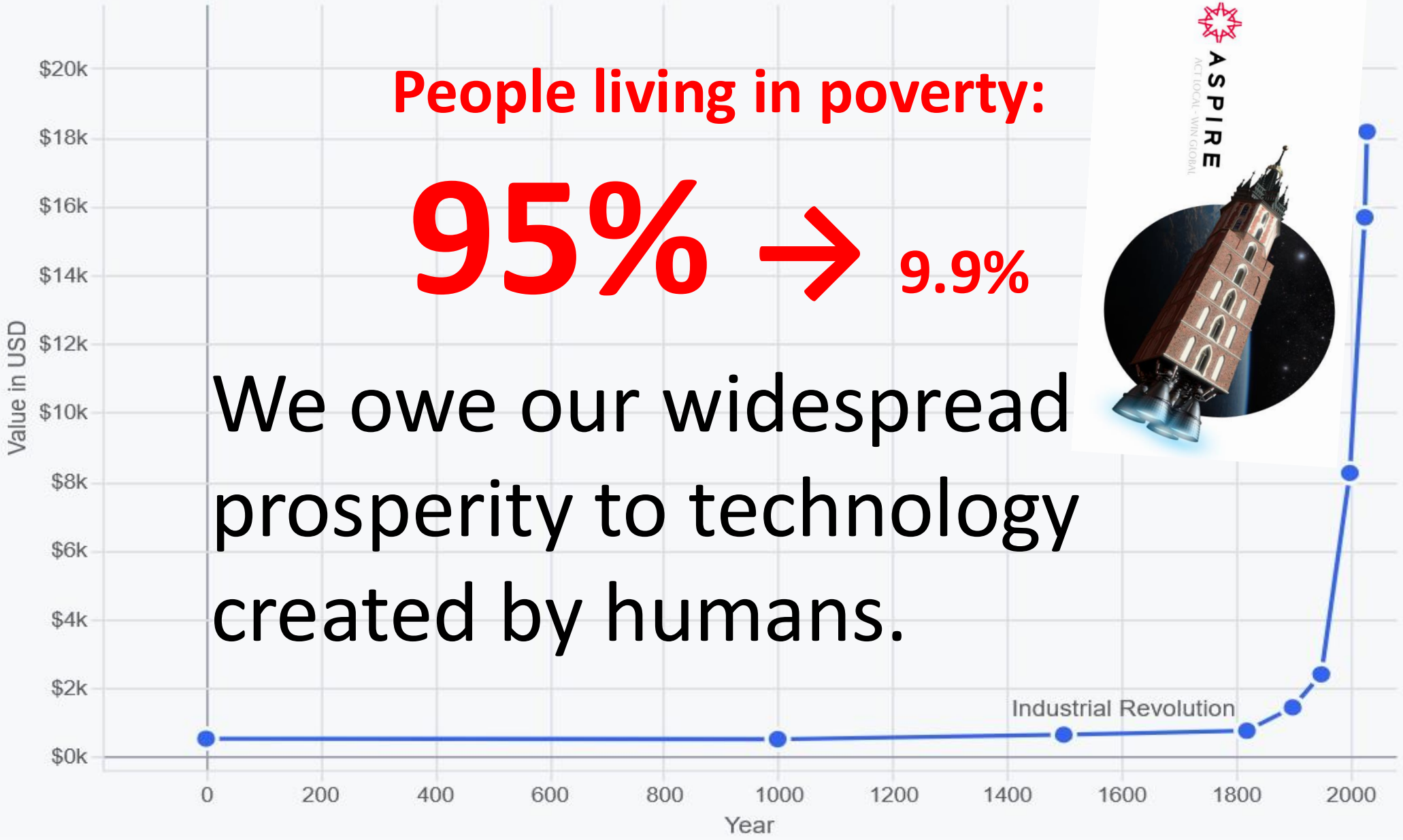
- **ZBIGNIEW BARTUŚ**

Global GDP per Capita (Constant 2026 USD) with IMF Forecast to 2030

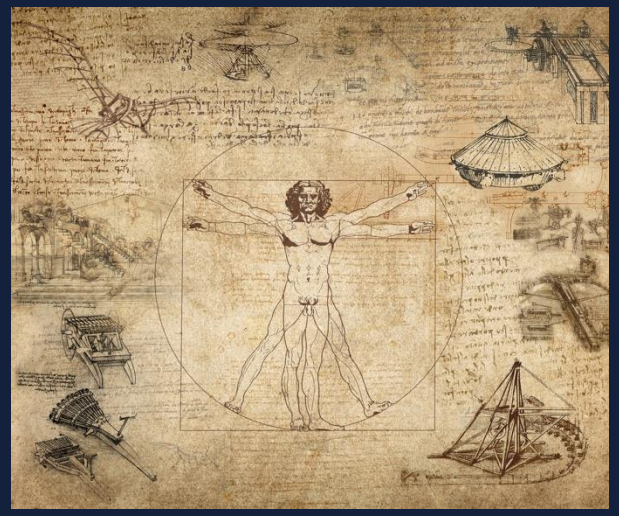
People living in poverty:

95% → 9.9%

We owe our widespread prosperity to technology created by humans.



Advantages of human



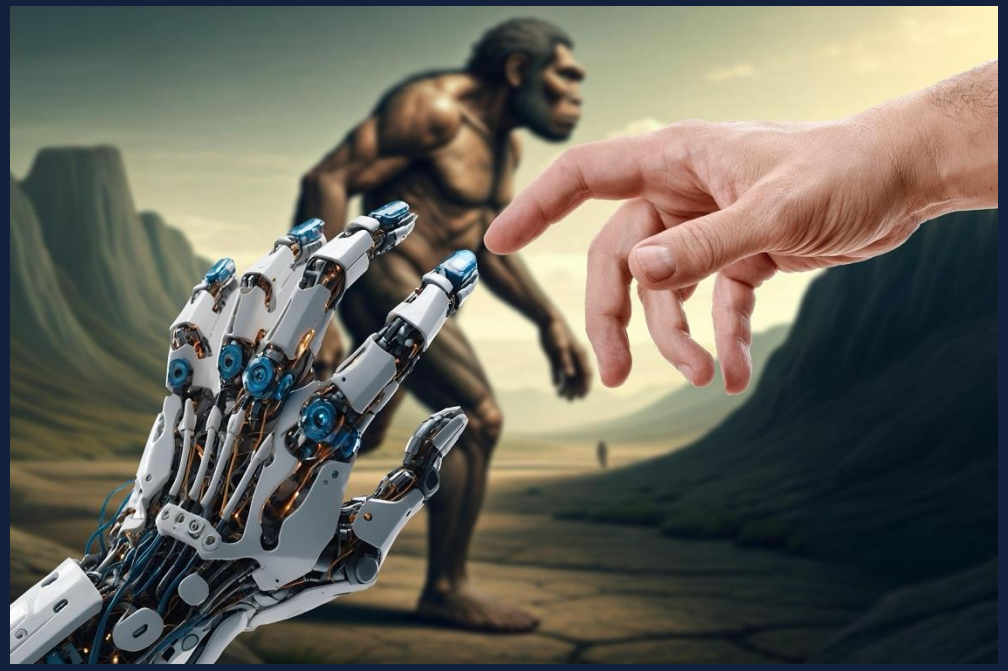
🧠 Abstract thinking

📖 Creating fiction

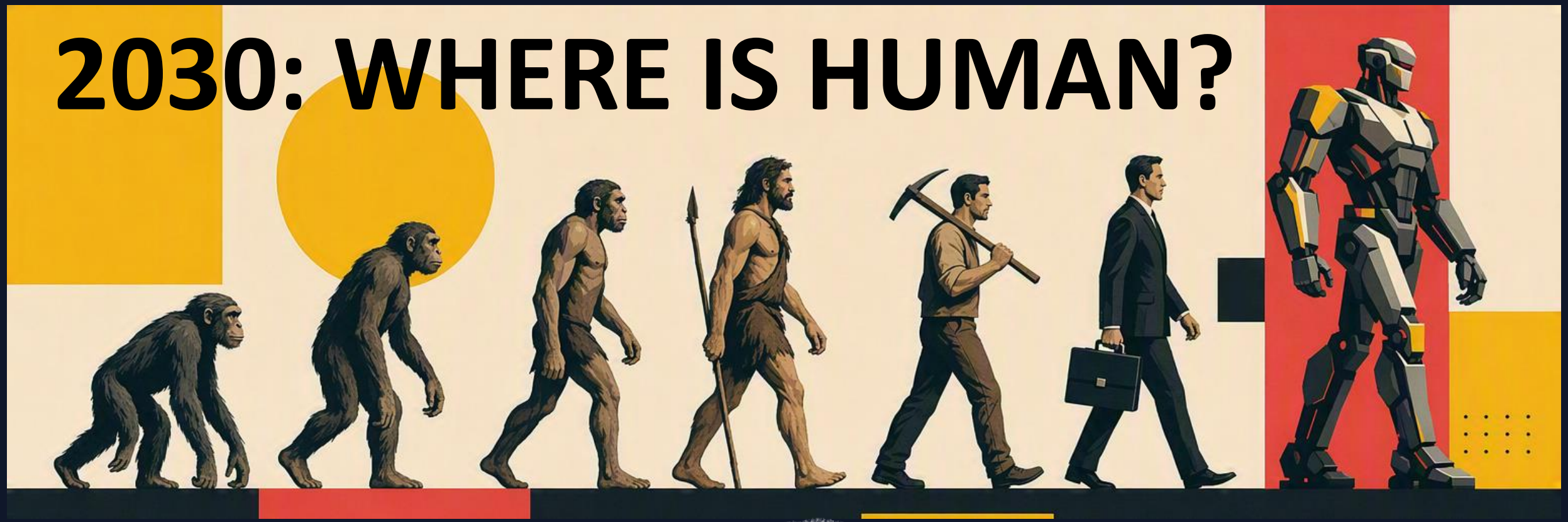
Result: 🤝 Cooperation based on ideas (religion, state, law, property, money)

QUESTION:

WILL WE PASS ON THESE COMPETENCIES TO MACHINES?



2030: WHERE IS HUMAN?



In the Bahamas. | **There is no human.**

Permanent vacation vs. World of machines

CREATIVE TENSION

WHO DRAWS THE LINE

Who ~~draws~~ moves the line?

Capability never moved it. The customer did.

Copyright © 2026 Ocado Group

Is Kraków a good place to talk about it?

THE BEST

We are in the city of

Stanisław Lem

who a long time ago predicted

- the Internet
- the Google search engine
- smartphones, tablets
- e-books
- 3D printing,
- VR, IoT, digital twins
- Video calls
- drones
- the development of AI

But he also warned against:

- fake news
- post-truth
- the use of technology

to build totalitarianisms

- matrix.

We have to **face his predictions**.

Is Kraków a good place to talk about it?

THE BEST

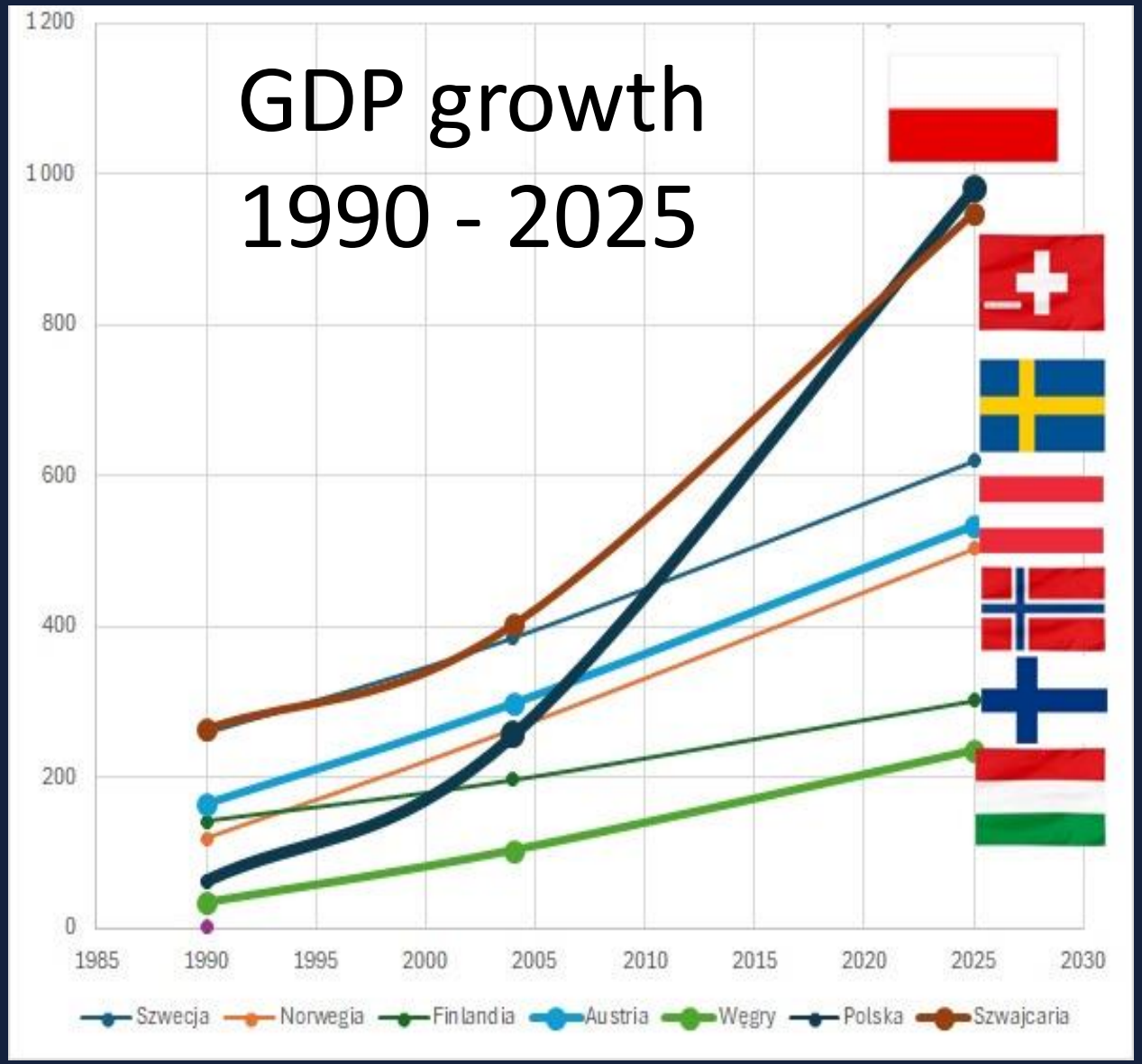
Krakow's IT talent pool reached

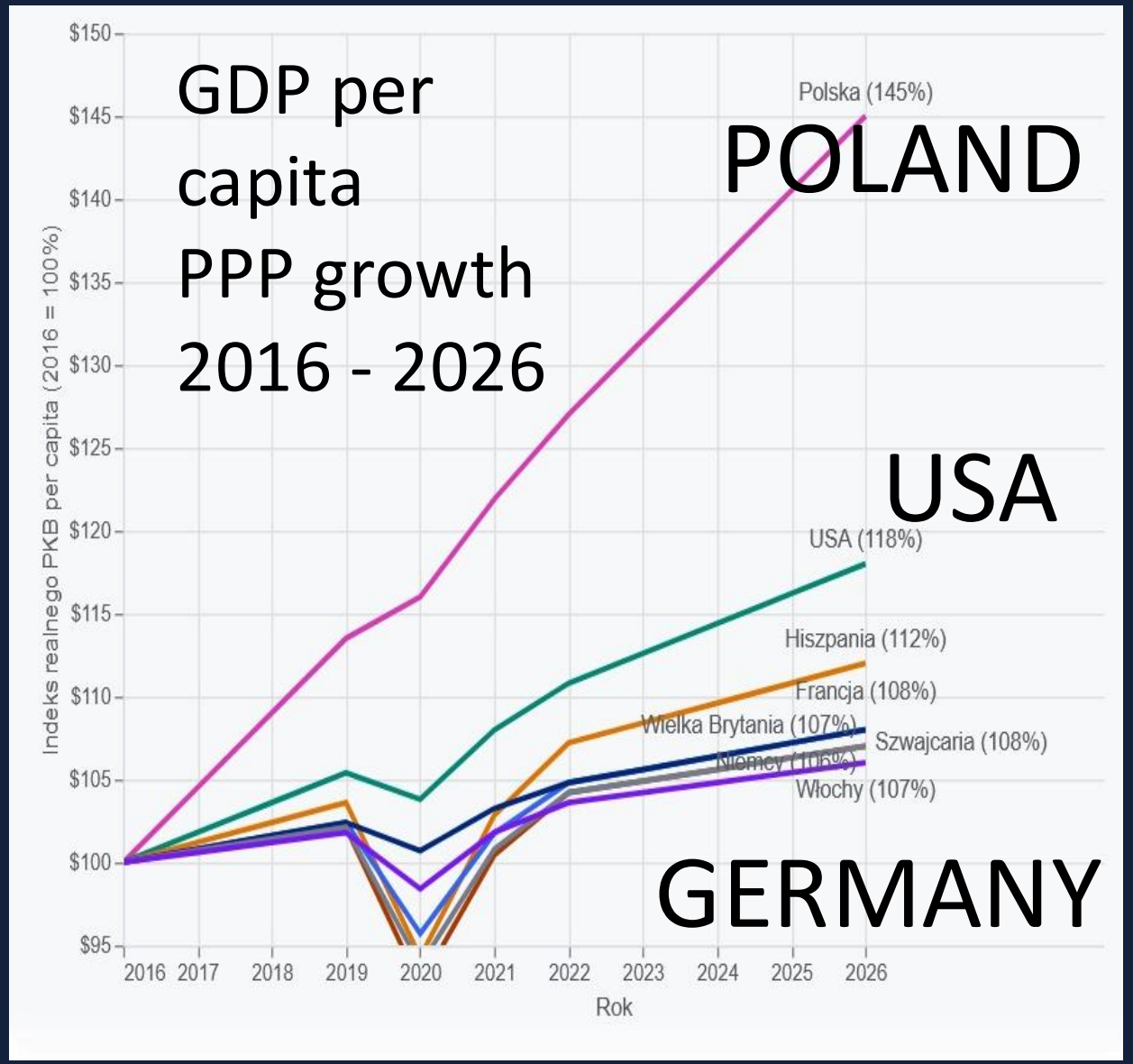
65 000 specialists.

IT specialists now account for

12% of everyone employed in the city.

Is Poland a good place to talk about it?





Przemysław ROTH:

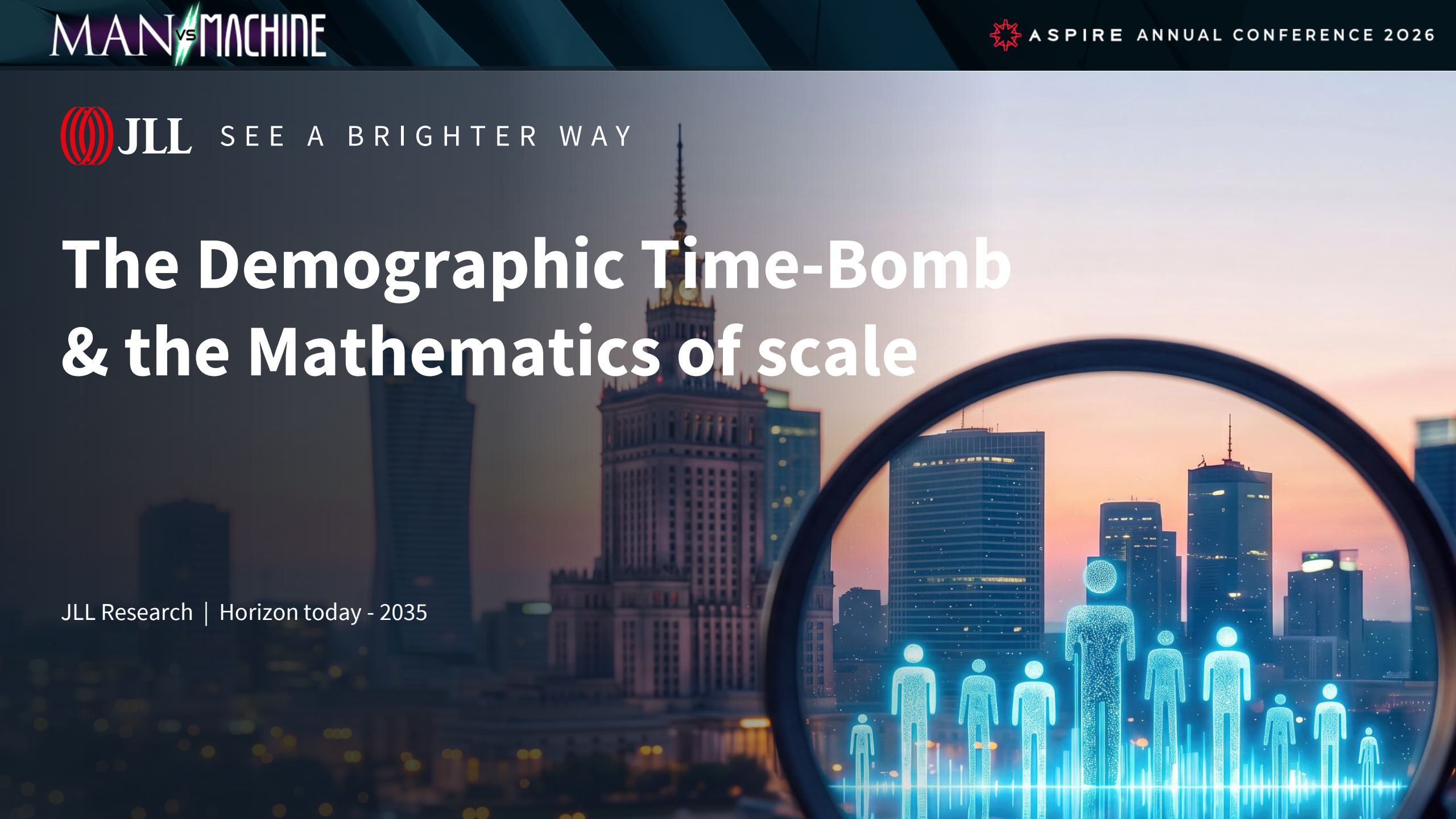
Our assets
expertise, high digital resonance, cost-to-quality balance, ecosystem density, academia

What we need
take the lead in global transformations – who dares wins!, leverage capabilities in neighbouring regions - cooptation

Source: Kearney Global Services Location Index

JLL SEE A BRIGHTER WAY

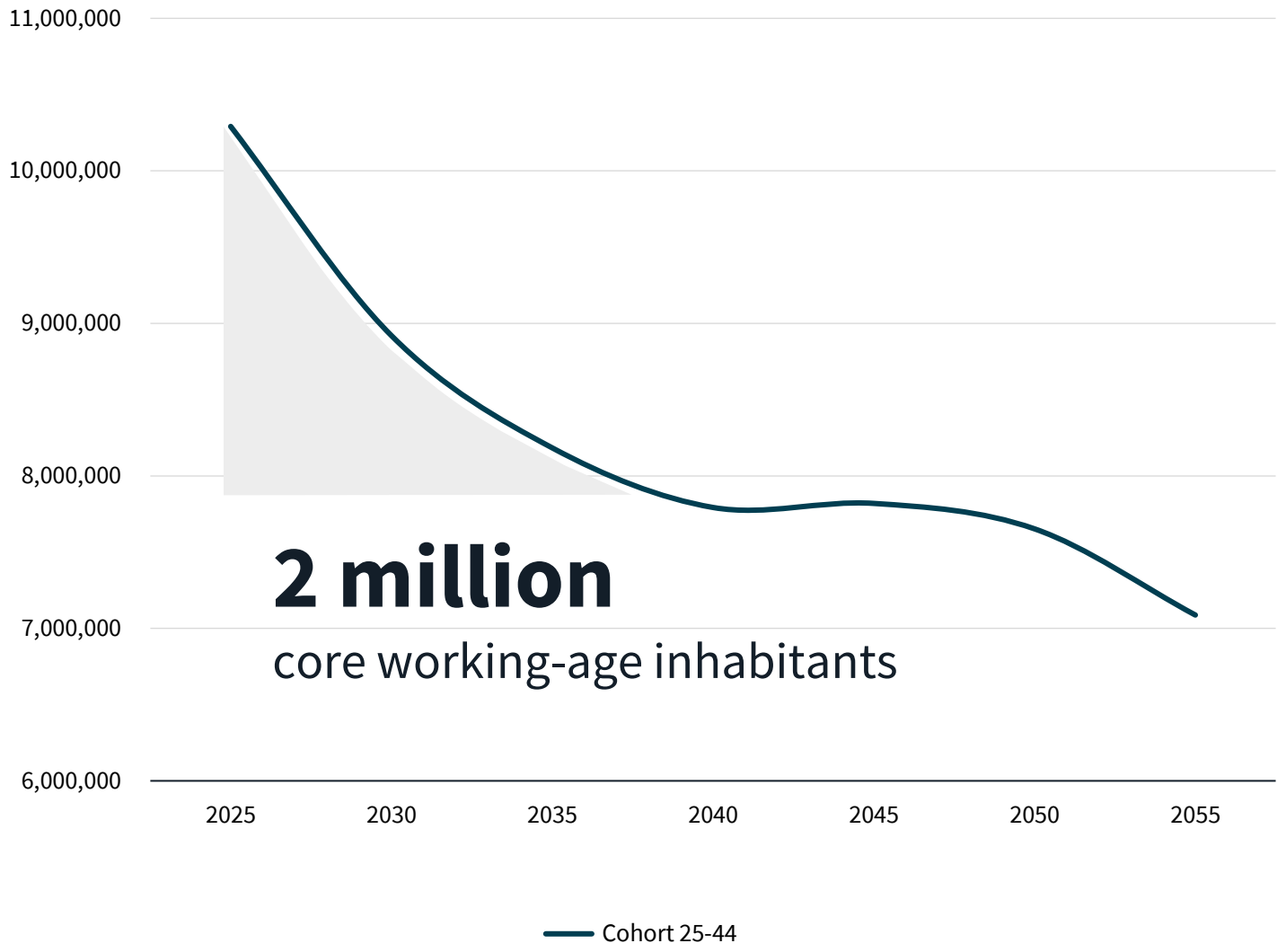
The Demographic Time-Bomb & the Mathematics of scale



JLL Research | Horizon today - 2035

Imagine Warsaw's **1.8+ million** residents disappearing from the economy.

That's the scale of Poland's 25–44 population collapse **by 2035**

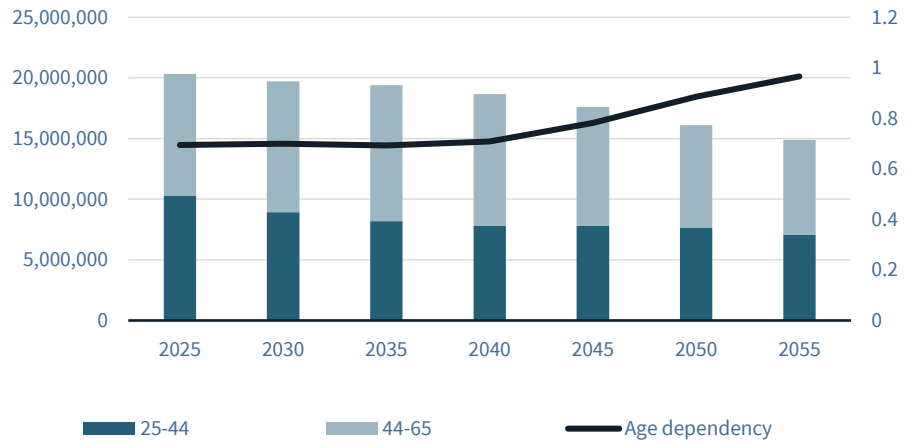


Source: Statistics Poland; JLL Research

Workforce Demography

–20%
Working-age 25-44 population 2025–2035

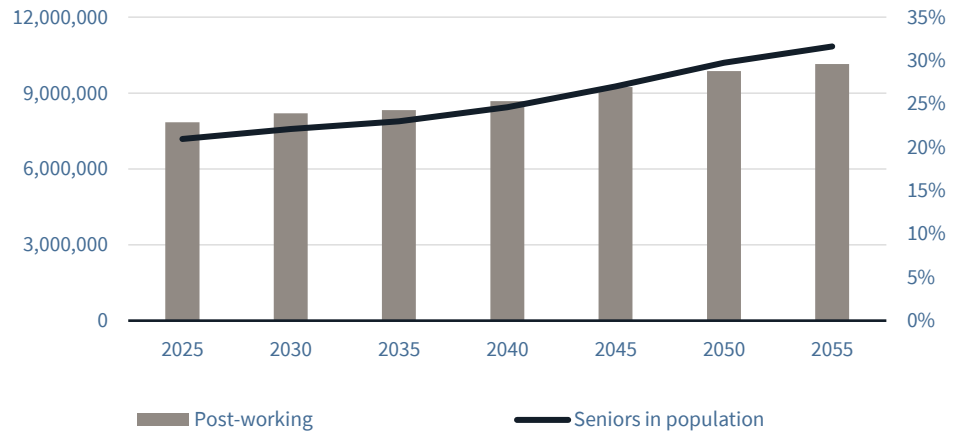
Shrinking Working-Age Population



The 24-44 cohort – the primary driver of todays' consumption and workforce – will decrease by an estimated 1.5–2M people by 2035.

23%
Population 65+ by 2035

Accelerating Ageing



By 2035, almost every fourth Pole will be over 65. The "silver wave" reshapes our society.

 | Source: Statistics Poland; JLL Research

Active population ages by 2040, then retires

Minus 3M working-age inhabitants exiting the market between 2040 and 2050

–20%
Working-age 25-44 population 2025–2035

Shrinking Working-Age Population

-3.5% total working pool by 2035

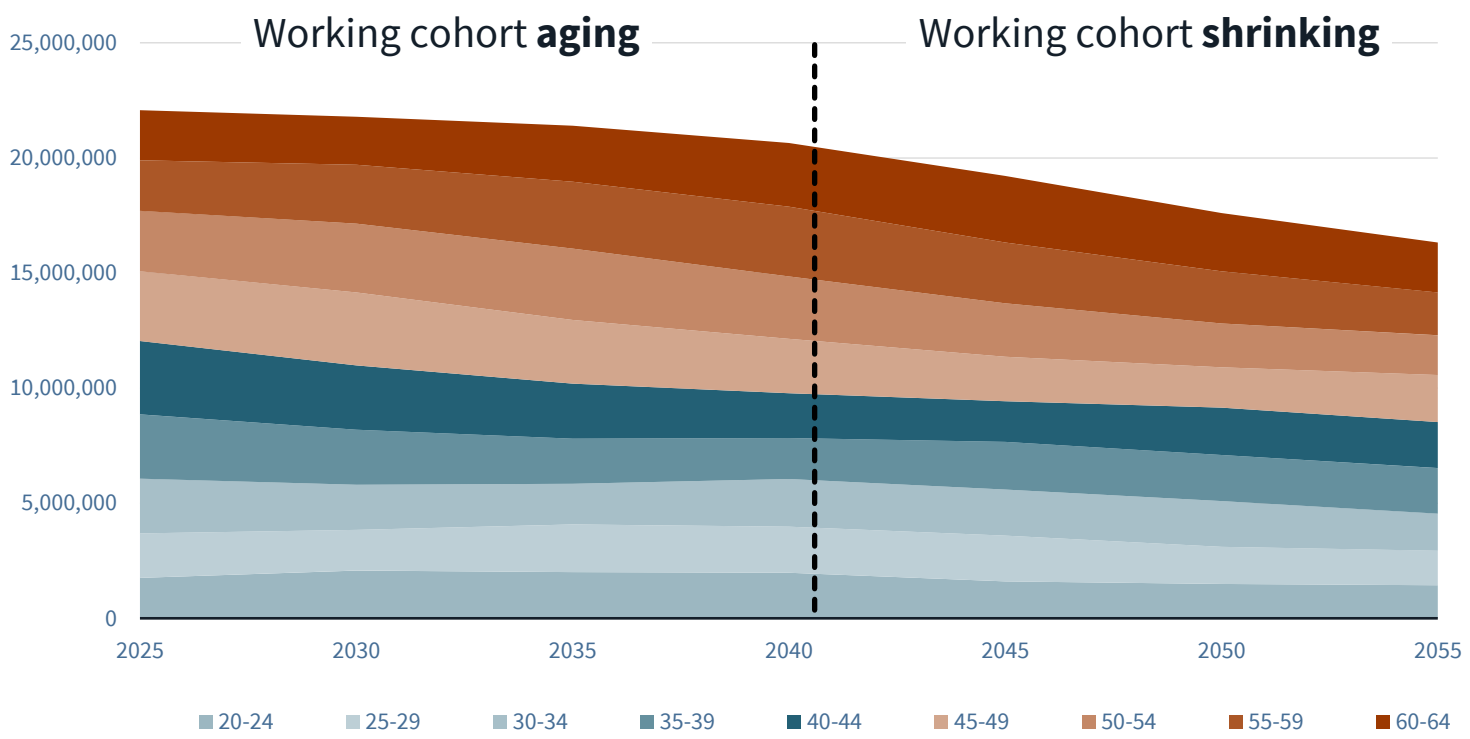
-8.4% by 2040

Accelerating post 2040

-22% in 2025-2050

-27% by 2055

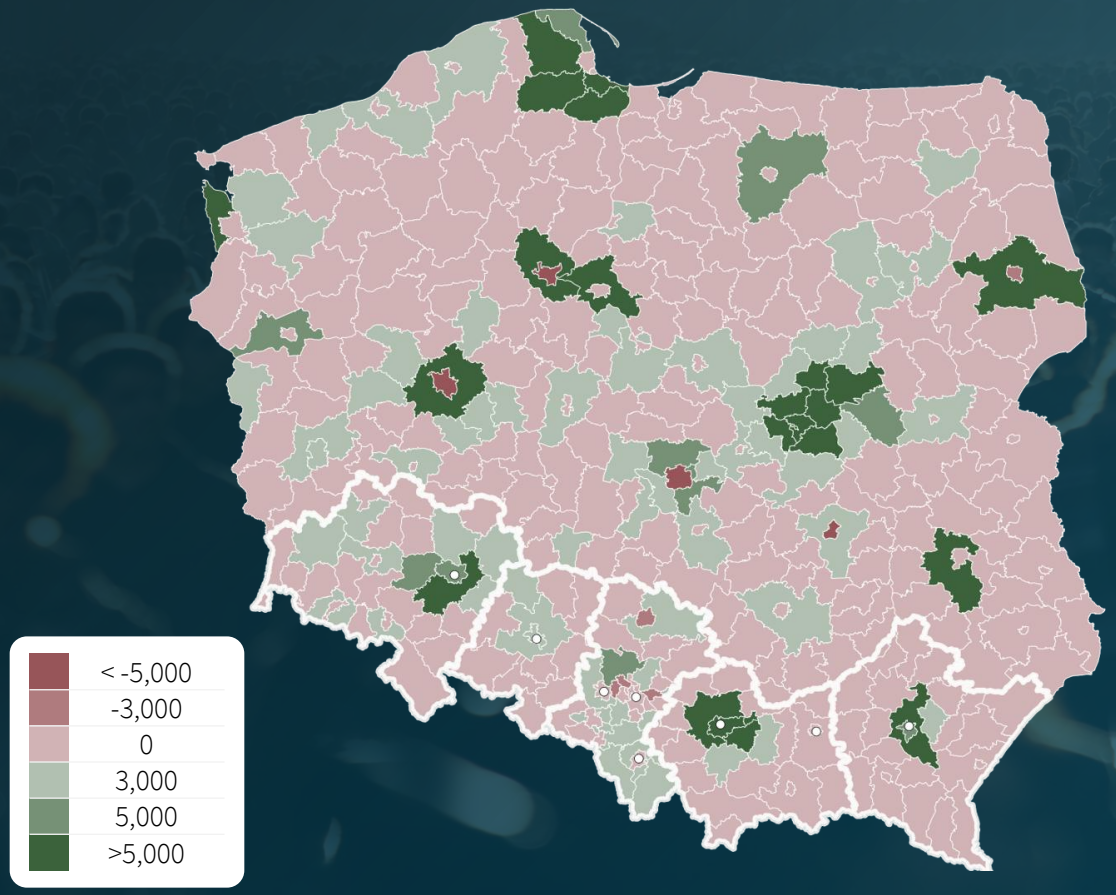
Today's active population ages, **then retires**.



 | Source: Statistics Poland; JLL Research

Internal Migration
The Metropolitan Gravity

Balance of migration



Source: Statistics Poland, JLL Research

Internal Migration: Metropolitan Gravity

Structural flow from smaller towns to 7 metropolitan areas has been accelerating for two decades

Education and employment remain the primary pull factors - **not reversible by remote work alone**

Key agglomerations are absorbing the majority of migration flows. Secondary and smaller markets face structural population loss unrelated to economic cycles.

Southern Poland Metropolitan Concentration: Diverging Futures

Population change is not uniform.

METROPOLITAN CORES Growing			City	Suburbs
▲	Wrocław	**+2.8%** by 2035	+1%	+6%
▲	Kraków	**+2.7%** by 2035	+3%	+2%
▼	Silesia*	**-6.2%** by 2035	-7%	-6%
SOUTHERN REGIONAL HUBS				
▲	Rzeszów	**+2.6%** by 2035	+3%	+2%
▼	Opole	**-3.6%** by 2035	-3%	-4%
▼	Tarnów	**-5.7%** by 2035	-12%	-3%

Metropolitan cores as a safe haven

Largest cities grow despite general demographic downturn, attracting inhabitants of smaller towns in the region

Rzeszów: The dark horse of regional demographics

Strong local economy and migration balance make Rzeszów the dominant south-eastern HUB

Silesia declining in population density

Dispersed Silesian region decreases in population.

Regional cities under pressure

In markets where population shrinks, structural vacancy becomes a greater risk than cyclical demand fluctuations.

Source: Statistics Poland; JLL Research

*Silesia: Będzin, Chorzów, Dąbrowa Górnicza, Gliwice, Katowice, Mikołów, Mysłowice, Piekary Śląskie, Ruda Śląska, Siemianowice Śląskie, Sosnowiec, Świętochłowice, Tarnowskie Góry, Tychy

Demographics isn't a threat to mitigate.

It is a competitive advantage to capture.

58.6%

BSS jobs now knowledge-intensive

requiring long-term onboarding & advanced skills - up from ~48% in 2020.

Automation & Innovation investments

made now will define your future productivity.

Upskilling, Reskilling and Lifelong Learning

JLL