THE
WORLD STAGE

Displaced or Repositioned?

Kraków's Real Standing in the Global GBS Race

MAN vs MACHINE
ASPIRE ANNUAL CONFERENCE

LOCATION PERSPECTIVES
Shaping cross-border business

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Kraków in the Evolving GBS Landscape

Faster, Higher, Stronger - Together

An outside-in view prepared for ASPIRE

SEPTEMBER 2026

Ten topics shaping GBS location decisions

Not exhaustive listing

01 Location-agnostic?

No (for now)

02 Rising costs

The gap is narrowing

03 Less in-country arbitrage

Cost advantages compress

04 Geopolitics and resilience

Strategic risk shapes portfolios

05 Shoring mix

Far-shoring still strong

06 Brownfield expansion

Less new locations

07 Attrition

Management call not curse

08 Hybrid work

Stabilisation (?)

09 Portfolio and site count

No universal standard

10 Location criteria

Cost and talent still lead

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Footprint decisions

2015 - 2025

	Delivery sites	People employed	Cities	Countries
Global	10,000	~12m	890+	92
EMEA	3,800	~3.5m	340+	50
CE	1,100	~1m	200+	17

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GBS Destination Leagues

Comparing apples with apples

Mega Cities Exceptional scale, deep talent pools and highly layered ecosystems	Bengaluru, Hyderabad, Kuala Lumpur, Manila, …
Major Cities Large, internationally recognised ecosystems with sustained investment activity	Barcelona, Chennai, **Kraków**, San José, …
Core Cities Mature, embedded locations with repeat-investment track records	Cairo, Prague, Tricity, Vilnius, …
Scaled Cities Meaningful activity, but more limited ecosystem depth and breadth	Łódź, Porto, Riga, Sofia, …
Emerging & Selective Cities Early-stage or selectively used locations with relatively shallow ecosystems	Belgrade, Katowice, Plovdiv, Tirana, …

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Kraków vs. Mega Cities

Relevant only if European alignment, cohesion and complex delivery outweigh volume economics

Kraków's positioning

Mega GBS Cities dominate in terms of scale and capacity. Kraków differentiates through a more cohesive and controlled delivery environment, making it better suited for complex, business-critical operations rather than large-scale, volume-driven deployments.

Kraków is a selective alternative for different work — not a substitute for mega-scale.

Kraków advantage

- Manageable scale and cohesion
- Talent quality and stability
- Operational focus

Weaknesses

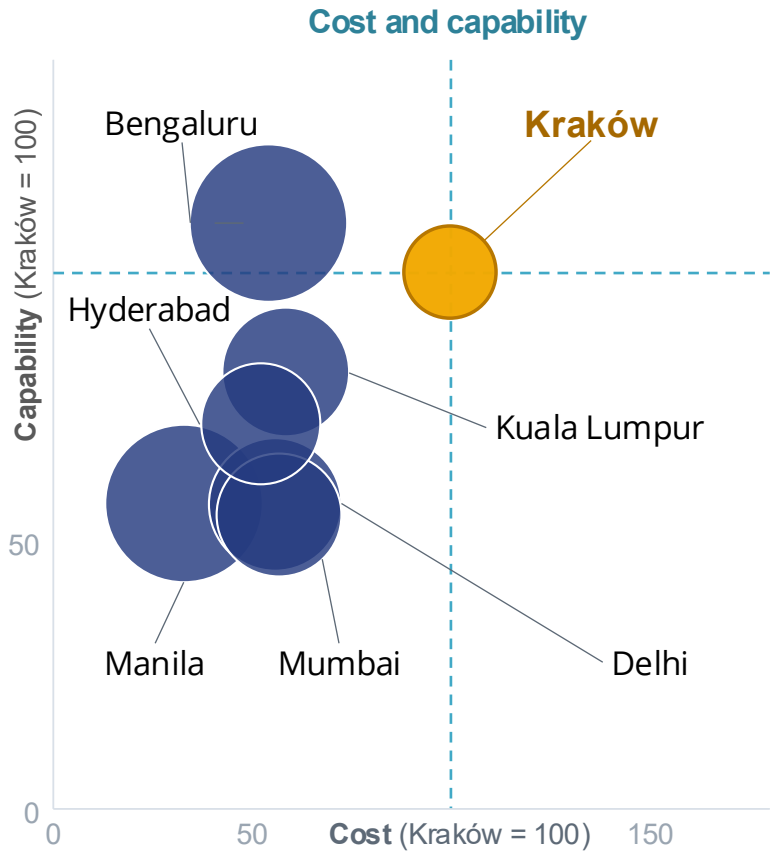
- Scale limitations
- Ecosystem breadth

Opportunities

- Positioning as regional hub
- Complex delivery focus

Watchpoints

- Volume-driven competition
- Global consolidation trends



Bubble size = Number of delivery-centres

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Kraków vs. Major Cities

Differentiates through maturity, balance and delivery credibility rather than hyper-growth

Kraków's positioning

Compared with faster-growing peers, Kraków offers a more predictable, multi-functional proposition with a mature leadership pool. The trade-off is less scale and an employment-cost position that is not always favourable.

Kraków competes through balance and execution certainty — not maximum growth.

Kraków advantage

- Balanced ecosystem
- Delivery credibility

Weaknesses

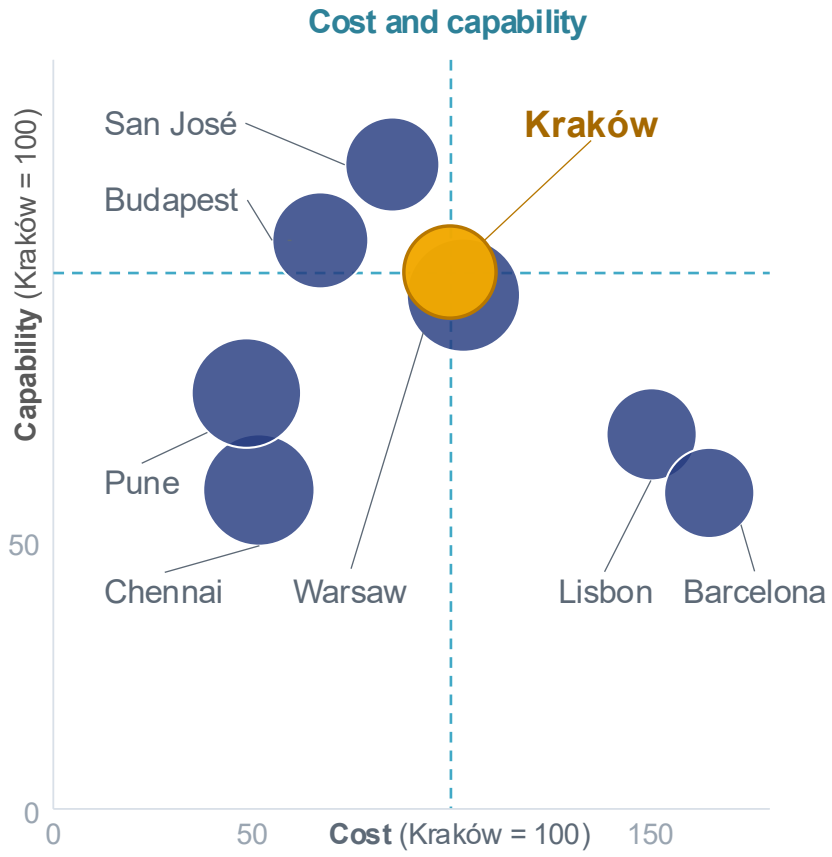
- Relative scale gap
- Cost position

Opportunities

- Differentiation through stability
- Capability deepening

Watchpoints

- Aggressive growth markets
- Capability convergence



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Kraków vs. Core Cities

Stands-out through combined scale, leadership depth and maturity rather than cost

Kraków's positioning

Kraków's differentiator is not one extreme metric. It is the combination of scale, functional breadth, experienced leadership, repeat investment and location credibility — attributes few peers match simultaneously.

Kraków's strongest case is the combination of attributes — not dominance on one measure.

Kraków advantage

- Benchmark balance
- Ecosystem maturity
- Location credibility

Weaknesses

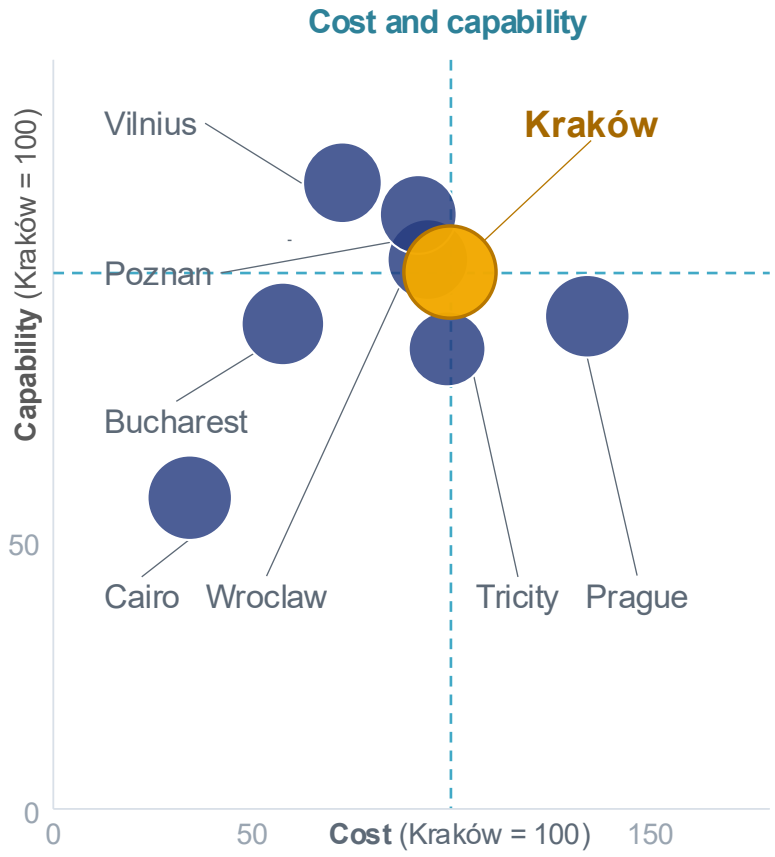
- Cost competitiveness
- Talent pressure

Opportunities

- Leadership within peer group
- Advanced capability build-out

Watchpoints

- Peer competition
- Erosion of differentiation



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Kraków is being repositioned — not replaced

Long-term relevance depends on ability to sustain complex delivery and anchor distributed GBS ecosystems

The context

01 Location still matters

02 Cost still matters

03 Expansion is changing.

04 Growth is moderating

05 Kraków has matured.

The conclusion

Why Kraków remains relevant

- Scale and management
- Delivery breadth and track record
- Poland's delivery platform

Where pressure is rising

- Cost for standardised work
- Competition for specialist talent
- Distributed portfolio strategies

What matters next

- Complex, analytical, AI mandates
- Regional anchor, governance hub
- Stronger stakeholder coordination

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Shaping cross-border business

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About

LocationPerspectives is a deeply-experienced location strategy advisory with field experience in 350 cities across 48 countries.

It focuses on “what works”, from strategy through implementation and advised on over 130 shared services and global business services location decisions. Around the world.

Its location advisory experience also includes manufacturing, R&D and logistics.

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