

Strong cities



City attractiveness, office market, HR trends

H1 2025

The office market sentiment, the investment potential of the city and the labour market.

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Wrocław

Prepared
in cooperation with



Wrocław Agglomeration
Development Agency

Michael Page

Wrocław



City area
293 sq km



Population
893,500
(University of Wrocław, 2024)



Population
of the agglomeration
1.200,000
(Wrocław City Hall, 2025)



Migration balance
(+) 1.4 (06.2024, GUS)



Unemployment rate
1.8%
(05.2025, GUS)



GDP growth
8.5%



GDP per capita
PLN 104,360
(gross)



Average salary (gross)
PLN 9,409.40
(in the business sector,
05.2025, GUS)

Investment attractiveness

Rankings

1ST
PLACE

in fDi's **Mid-Sized European Cities of the Future 2025 - Overall**

1ST
PLACE

in fDi's **Mid-Sized European Cities of the Future 2025 - Business Friendliness**

1ST
PLACE

in Poland, No. 2 in Europe, No. 8 in the world in **rising star among technology hubs category**, according to the „The next generation of tech ecosystems” report compiled by Dealroom

2ND
PLACE

in Poland in the ranking by **number of people employed in IT** according to the ABSL report "Business Services Sector in Poland 2024"

2ND
PLACE

in „**Polish Startups 2024**” compiled by the Startup Poland Foundation

2ND
PLACE

in fDi's **Mid-Sized European Cities of the Future 2025 - FDI Strategy and Economic Potential**

2ND
PLACE

in **Business Environment Assessment Study (BEAS) 2024**

Investment incentives

"One stop shop" - Investment process support from the Wrocław Agglomeration Development Agency.

Real estate tax exemption in case of investments in a photovoltaic installation, heat pump, recuperator, ground heat exchanger, solar collector.

Accelerator programmes: Concordia Design Accelerator, Accel Boost, Startup Booster for Social Impact.

Real estate tax exemptions in Wrocław.

Lower Silesian Special Economic Zones.



Quality of life

Rankings

1ST

PLACE

in fDi's **Mid-Sized European Cities of the Future 2024**
- Human Capital and Lifestyle



Wrocław listed among the 100 cities of the EU mission, „**100 Climate Neutral and Smart Cities by 2030**”

Research and development potential in the Wrocław agglomeration

1) High concentration of R&D companies

Wrocław has 11% of Polish companies with the status of R&D center granted by the Ministry of Development and Technology.

2) Diversity of R&D business fields

Companies in Wrocław conduct R&D activities in a wide range of fields, such as engineering and manufacturing, information technology, chemicals and materials, energy, and medicine. This diversification contributes to the creation of innovative solutions in various sectors.

3) Innovative start-ups

Wrocław is the leader in Poland in terms of the number of start-ups, 28% of all Polish start-ups are registered in Lower Silesia, with the vast majority in Wrocław.

4) Significant role of universities

There are 30 universities in Wrocław, which educate more than 105,000 students, of which more than 42,000 are in fields of study that are key to R&D.

5) High rating of educational potential

64% of companies rate the educational potential of Wrocław universities in the context of R&D cooperation as good or very good. Students have access to numerous internship and traineeship programs at companies such as Selena, Mikroel, LG Energy Solution Wrocław, Hasco-Lek, among others, which fosters the development of practical skills.

6) Highly qualified human resources

Sixty percent of companies rate the availability of qualified R&D specialists as good or very good. High levels of education, creativity and innovation, and knowledge of modern technologies are the main strengths of Wrocław's human resources.

7) Dynamic growth of the R&D sector

At the turn of the last few years, the R&D sector in Lower Silesia has experienced dynamic growth, as reflected, among other things, in a 34 percent increase in the number of entities engaged in research and development activities.

Read more about the research and development potential in the Wrocław agglomeration in the latest report. →



Bike paths
1400 km



Green areas
~41% of the total city area

Facts & Figures



Number of students
106,000



Number of graduates
24,850



Number of universities
30



Airport - distance to the city centre
10 km



Airport - number of passengers
4,500,000 (2025)



R&D sector - number of research centers and departments
400



BSS sector - number of employed
70,300 (2025)
including in R&D centres
13 600 (ABSL 2025)



STEM - chart your future

RATING
AGENCY

Moody's

RATING

A-

Wrocław

H1 2025



Existing stock
● **1.36m** sq m



Supply under construction
↓ **25 000** sq m



Vacancy rate
↑ **20.5%**



New supply
● **0** sq m



Take-up
↑ **81,000** sq m

Standard lease terms in new buildings



Service charge
PLN/sq m/month
16.00-31.00



Rent-free period
1.5 month
for each contract year



Fit-out budget
EUR/sq m
450.00-550.00

► Wrocław is the third-largest office market in Poland, following Warsaw and Krakow. The city offers 1.36m sq m of office space, which accounts for over 10% of Poland's total office stock.

Since the beginning of the year, approximately 81,000 sq m of office space have been leased in Wrocław, marking the second highest result among regional cities, just behind Krakow. The vacancy rate continues to rise, reaching 20.5% at the end of June. However, we expect that the limited volume of space under construction, combined with sustained strong demand, will contribute to a gradual decline in vacancy levels in the coming quarters.

SUPPLY

At the end of the first half of 2025, Wrocław's stock office reached 1.36m sq m, representing 10% of the total stock in Poland. Development activity remains limited, with no new office buildings delivered to the market since the beginning of the year. Currently, 25,000 sq m of modern office space is under construction across two projects. The largest of them is Swobodna Spot I, a development by Echo Investment, offering 16,000 sq m of space, with planned completion in early 2026.

TAKE-UP

Demand for office space in Wrocław remains strong. In the first half of 2025, tenants leased nearly 81,000 sq m, representing a 53% increase compared to the same period last year. As a result, Wrocław has strengthened its position as the second largest regional market in terms of demand, accounting for 21% of the total transaction volume in regional cities.

Renegotiations constituted the largest share of the leasing volume in Wrocław, accounting for over 51% of the space let. New lease agreements made up 40% of the volume, while expansions accounted for nearly 9%.

At the end of the first half of 2025, companies from the IT sector accounted for over 26% of the office space leased in Wrocław, confirming the significant role this industry plays in the demand structure. Thanks to the strong presence of technology companies, Wrocław remains one of the largest IT markets in Poland.

VACANCY RATE

At the end of June 2025, the office vacancy rate in Wrocław reached 20.5%, surpassing the previous quarter's record by 0.1 pp. Compared to the same period last year, the rate increased by 2.1 pp. The limited number of new projects under construction combined with stable demand, may contribute to a further decline in vacancy levels in the coming quarters.

RENTS

At the end of Q2 2025, asking rents in Wrocław remained stable compared to the previous quarter, typically ranging between EUR 11.00 and 16.00/sq m/month. However, rents for prime office spaces in newly constructed buildings could surpass this range. Service charges have also remained stable as of June 2025, generally falling within the range of PLN 16.00 to 31.00/sq m/month

Office market in Poland

H1 2025



SZCZECIN

187,000 sq m
7.3%
EUR 10-14.5

POZNAŃ

678,000 sq m
14.8%
EUR 11.5-16

WROCLAW

1.36m sq m
20.5%
EUR 11-16

KATOWICE

761,000 sq m
22.7%
EUR 10-14.5

KRAKOW

1.83m sq m
17.3%
EUR 10-18

TRICITY

1.07m sq m
12.7%
EUR 11-16

WARSAW

6.33m sq m
10.8%
EUR 10-28

LÓDŹ

643,000 sq m
21.6%
EUR 9-15

LUBLIN

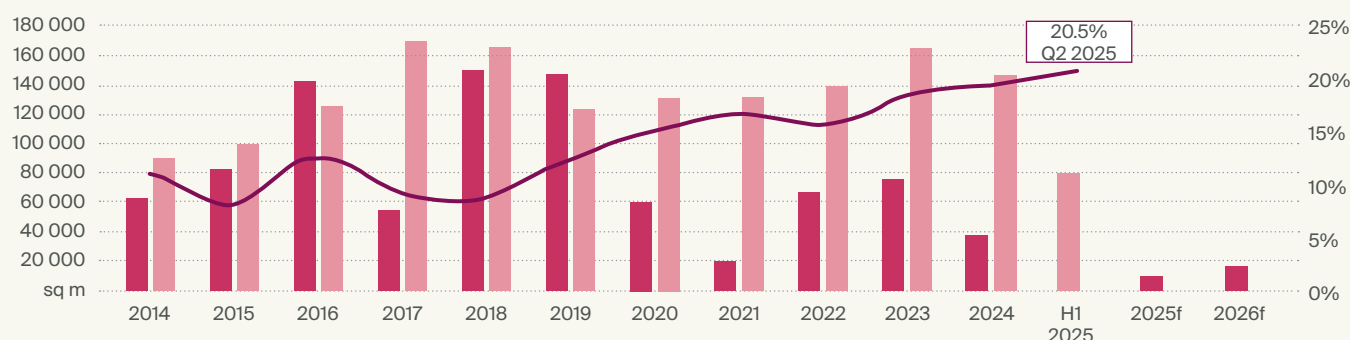
221,000 sq m
10.4%
EUR 9-13

office stock - vacancy rate
asking rents (per sq m per month)

Source: Knight Frank

Annual new supply, take-up and vacancy rate in Wrocław

new supply take-up vacancy rate

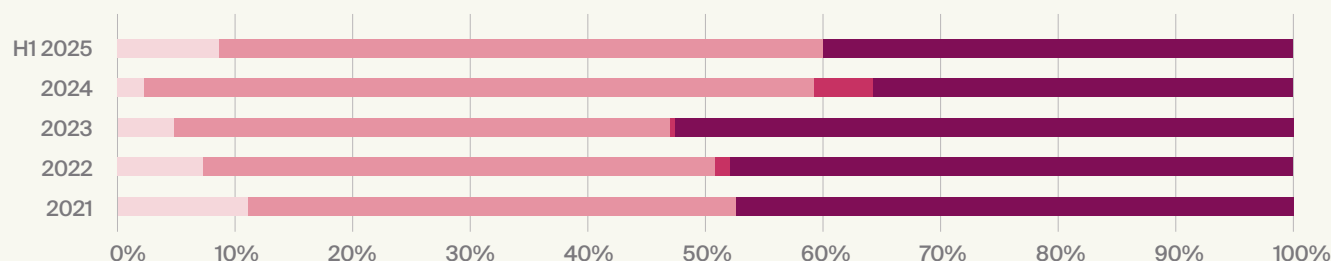


f-forecast based on schemes under construction

Source: Knight Frank

Take-up structure in Wrocław

expansions renewals owner occupied new deals (including pre-let transactions)



Source: Knight Frank

Pay Transparency: Realities and Challenges of the Labor Market

► Pay transparency was intended to be a breakthrough in the labor market – a tool for building trust, promoting equality, and enhancing modern employer branding. According to the EU directive, starting in December 2025, Polish companies will be required to disclose salaries or salary ranges in job advertisements, report on the gender pay gap, and ensure employees have the right to access information about salaries for comparable positions.

CLASH BETWEEN IDEA AND PRACTICE

The way the directive is set to be implemented in Poland does not fully reflect all of its provisions, leaving interpretative gaps and ambiguities regarding the scope of employers' obligations and methods of enforcement. Publishing salary ranges is only the beginning – what truly matters will be job evaluation, a

"Nearly 4 in 10 women believe that pay disparities still exist within their companies for similar positions."

coherent pay policy, and the readiness to answer tough questions from employees.

In practice, some companies – as seen with previous directives – are not planning to actively implement the new requirements. Instead of investing in reporting systems and transparent pay structures, they prefer to risk potential fines, assuming that the likelihood of inspections and sanctions is relatively low and that the cost of compliance outweighs possible penalties.

EXPECTATIONS VS. CHALLENGES

According to the Michael Page Talent

Trends 2025 report, candidates prioritize clear compensation policies, flexibility, and alignment with organizational values. For younger generations, pay transparency is becoming the norm, and companies that embrace it gain a competitive advantage in attracting top talent. At the same time, nearly 4 in 10 women believe that pay disparities persist in their companies for similar roles, and nearly one in three is dissatisfied with their employer's efforts in this area¹. Poor implementation of the regulations may lead to disappointment among both job candidates and current employees and further frustration over the lack of genuine equality and transparency.

Amid these challenges, it's worth

"53% of active real estate agents are women."

highlighting industries where women have played a significant role for years. A good example is the real estate sector, which in Poland stands out with a high percentage of female agents. According to data from Otodom, 53% of active real estate agents are women². Their dominance in the profession has persisted for over 20 years, thanks in part to valued soft skills and alignment with client expectations. Recent analyses show that the real

¹ Talent Trends 2025, Michael Page, 26.06.2024, <https://www.michaelpage.pl/talent-trends>, dostęp 14 lipca 2025.





"Starting in December 2025, an EU directive will require companies to disclose salary levels or pay ranges in job advertisements."

estate sector also demonstrates a higher level of pay equity than many other industries. Gender pay gaps are minimal here, mainly due to transparent compensation practices and a commission-based pay structure.

Growing awareness in the industry along with mentoring, training, and networking initiatives—is providing women with increasing support for career development, resulting in more frequent promotions. While commercial real estate remains male-dominated, the share of women in leadership and management positions is steadily rising.

At the same time, broader labor market disparities remain significant. In 2023, the employment rate for women was nearly 15 percentage points lower than for men. The gender pay gap and unequal access to promotions are also major challenges—issues that pay transparency was meant to address. However, incomplete implementation

of the regulations may limit their impact.

DEMOGRAPHIC DECLINE – INCREASINGLY DIFFICULT TO ATTRACT EMPLOYEES

The Polish labor market is currently facing an unprecedented demographic challenge. According to forecasts, by 2035 the number of workers in Poland will decrease by as much as 2.1 million over 12% compared to the current workforce³. In this context, not only attracting new talent but also better activating women in the labor market becomes essential. Labor shortages are already evident in key specializations, and low birth rates combined with an aging population will only deepen the problem. This points to growing competition for talent, as well as the

"According to forecasts, by 2035, the number of workers in Poland is expected to decrease by more than 12% compared to the current working population."

need to invest in employer branding and modern recruitment strategies. The Pay Transparency Directive has

the potential to revolutionize the Polish labor market. However, realizing this potential depends on effective and consistent implementation—something still hindered by imperfect legislation and reluctance among some companies to embrace real change. These challenges also apply to the real estate sector, which despite a high proportion of women—must, like other industries, face demographic pressures and growing demands to build a genuine culture of trust and equality.

The future belongs to organizations that treat transparency not as an obligation, but as an opportunity for growth and competitive advantage.

² Data Otodom, Otodom, 05.02.2021, <https://www.otodom.pl/wiadomosci/profesjonalisci/posrednicy/kim-sa-polscy-posrednicy-nieruchomosci-poznaj-dane>, access 14 lipca 2025.

³ The consequences of demographic changes for labour supply in Poland, Polish Economic Institute, 14.10.2024, <https://pie.net.pl/przy-obecnym-trendach-demograficznych-do-2035-r-zatrudnienie-w-polsce-moze-spasc-o-ponad-12-proc/>, access 14 lipca 2025.

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- ▶ tailored presentations and market reports for clients.

Reports are produced on a quarterly basis and cover all sectors of commercial market (office, retail, industrial, hotel) in major Polish cities and regions (Warsaw, Kraków, Łódź, Poznań, Silesia, Tricity, Wrocław, Lublin, Szczecin) and PRS sector in Poland. Long-term presence in major local markets has allowed our research team to build in-depth expertise of socio-economic factors affecting real estate market in Poland.

Report
library:



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The Wrocław Agglomeration Development Agency is a company whose goal is to attract foreign investors, and thus create new jobs and increase economic region. The company also conducts extensive information and promotion activities for residents and implements projects supporting development and cooperation in the agglomeration.

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