

# Strong cities



City attractiveness, office market, HR trends

Q4 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  
**2.3%**  
(11.2025, GUS)



GDP growth  
**8.5%**



GDP per capita  
**PLN 104,360**  
(gross)



Average salary (gross)  
**PLN 9,523.69**  
(in the business sector, 11.2025, GUS)

## Investment attractiveness

Rankings

**1<sup>ST</sup>**  
**PLACE**

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

**1<sup>ST</sup>**  
**PLACE**

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

**1<sup>ST</sup>**  
**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

**2<sup>ND</sup>**  
**PLACE**

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

**2<sup>ND</sup>**  
**PLACE**

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

**2<sup>ND</sup>**  
**PLACE**

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

**2<sup>ND</sup>**  
**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.



**1<sup>ST</sup>**  
**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

The Wrocław agglomeration accounts for nearly 3/4 of all R&D entities in the region, serving as the undisputed center of innovation in Lower Silesia.

Currently, there are over 100 specialized research and development and IT centers operating in the region, as well as the extensive Wrocław Technology Park, which constitutes a critical mass for effective technology transfer.

### 2) Diversification of R&D areas

Wrocław's research activities are characterized by broad diversification, covering strategic sectors such as MedTech (1st place in the country), AI and Machine Learning, and DeepTech. These innovations are closely correlated with Regional Smart Specializations (RIS3), including advanced chemistry, biotechnology, and Industry 4.0 technologies.

### 3) Innovative start-ups

Wrocław positions itself as the start-up capital of Poland, accounting for 28% of new registrations nationwide, with a strong focus on B2B models and expansion into the EU Single Market and global markets. The ecosystem includes over 250 dynamic entities that are increasingly building their advantage on patent-protected technologies (DeepTech).

### 4) The significant role of universities

Wrocław's 30 universities form the foundation of the ecosystem, being the main source of spin-offs and patent innovations. These universities actively implement strategies to integrate scientific research with the real needs of industry and city administration. Another advantage is the unique infrastructure, such as the "LEM" supercomputer and the "ODRA 5" quantum computer.

### 5) High rating for educational potential

The agglomeration's educational potential is rated highest among medium-sized European cities in the categories of human capital and lifestyle. The STEM-based education system educates over 21,000 students at the Wrocław University of Science and Technology alone, ensuring a steady supply of personnel for high-tech sectors.

### 6) Highly qualified workforce

Wrocław has a deep pool of technical and business talent, and over 57% of local startup founders have previous entrepreneurial experience, which minimizes the business risk of implementation.

### 7) Dynamic growth of the R&D sector

The research and development sector is experiencing exceptional growth, as evidenced by a 145% increase in the number of R&D entities over the last decade. Corporate investment in innovation has increased by 74% since 2010, confirming the ongoing trend of modernization of Wrocław's economic base.

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



Bike paths  
**1,400 km**



Green areas  
**~41%** of the total city area

## Fakty i liczby



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  
**4,907,527** (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)



Unique startups  
**283**



Active technology communities  
**+30**

RATING AGENCY

**Moody's**

RATING

**A-**

# Wrocław

Q1-Q4 2025



Existing stock  
● **1.34m** sq m



Supply under construction  
● **26,000** sq m



Vacancy rate  
↓ **19.9%**



New supply  
● **0** sq m



Take-up  
↑ **180,000** 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 ranks third in Poland in terms of total office stock, following Warsaw and Krakow. The city's modern office space amounts to 1.34m sq m, accounting for over 10% of the country's total stock.

In 2025, nearly 180,000 sq m of office space was leased in Wrocław, marking the highest annual take-up in the market's history. However, the vacancy rate continued to rise, reaching 19.9% at the end of December. The pipeline scheduled for completion in early 2026 may contribute to a further increase in the vacancy rate.

### SUPPLY

Development activity in Wrocław remains low. Since the beginning of 2025, no new office buildings have been delivered to the market. Currently, only two office buildings are under construction: Swobodna Spot I, offering 16,000 sq m, and The Park Wrocław 2, comprising nearly 10,000 sq m. Both schemes are scheduled for completion in early 2026.

### TAKE-UP

Take-up for office space in Wrocław remains strong. In 2025, tenants leased nearly 180,000 sq m, representing the highest annual result in the market's history and accounting for 23% of the total transaction volume recorded outside Warsaw. In Q4 alone, lease agreements totalling nearly 76,000 sq m were signed, marking the strongest quarterly performance on record.

However, renegotiations dominated the leasing structure, accounting for 57% of total take-up in 2025. New leases represented 33% of the volume, while expansions accounted for 10%. Throughout 2025, one owner-occupier transaction was recorded, comprising 1,500 sq m of office space.

In 2025, companies from the business services sector (BSS) accounted for over 23% of the total leased office space in Wrocław, confirming the sector's key role in the demand structure.

### VACANCY RATE

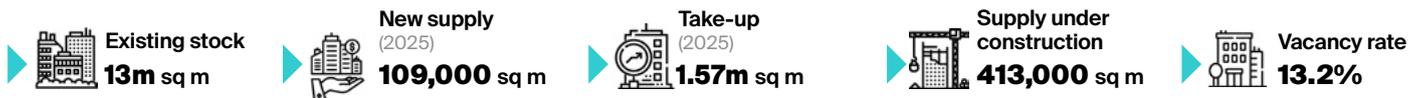
At the end of 2025, the vacancy rate in Wrocław stood at 19.9%, one of the highest levels in Poland. Despite the absence of new supply and the increased leasing volume, the vacancy rate increased by 0.6 pp compared to Q4 2024. This was primarily driven by the dominance of renegotiations in the lease structure, which do not generate net absorption.

### RENTS

At the end of Q4 2025, asking rents in Wrocław remained stable, typically ranging between EUR 11.00 and 16.00/sq m/month, although rents for prime office spaces in newly developed buildings may exceed this range. Service charges also remained broadly stable, usually ranging from PLN 16.00 to 31.00/sq m/month.

# Office market in Poland

Q4 2025



## SZCZECIN

190,000 sq m  
 6.4%  
 EUR 10-14.5

## POZNAŃ

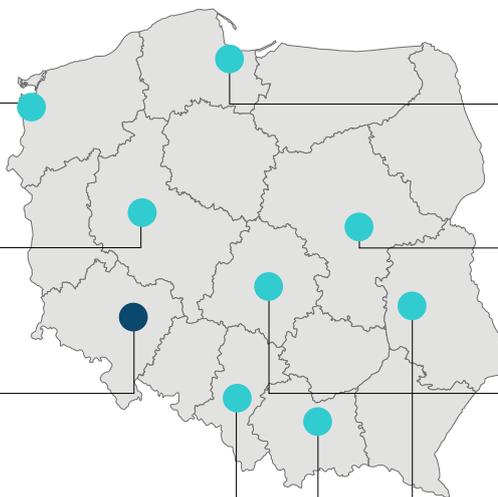
678,000 sq m  
 13.9%  
 EUR 11.5-16

## WROCLAW

**1.34m sq m**  
**19.9%**  
 EUR 11-16

## KATOWICE

742,000 sq m  
 21.6%  
 EUR 10-14.5



## TRICITY

1.07m sq m  
 11.9%  
 EUR 11-16

## WARSAW

6.23m sq m  
 9.1%  
 EUR 12-32

## ŁÓDŹ

643,000 sq m  
 18.3%  
 EUR 9-15

## LUBLIN

225,000 sq m  
 10.4%  
 EUR 9-13

## KRAKOW

1.84m sq m  
 18.4%  
 EUR 10-18

- 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

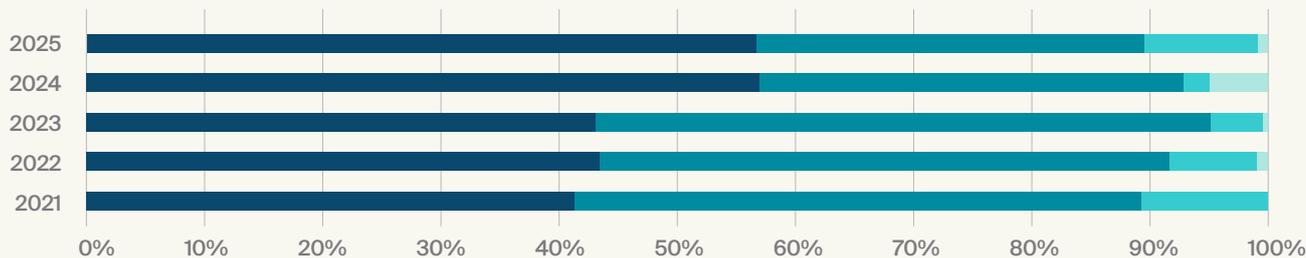


f-forecast based on schemes under construction

Source: Knight Frank

## Take-up structure in Wrocław

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



Source: Knight Frank

# Michael Page “Salary Guide 2026”: Poland’s Energy Labour Market Accelerates as Renewables and Offshore Drive Demand for Specialists

- Energetic transformation is clearly reshaping the landscape of the labour market in Poland. According to the “Salary Guide 2026” published by recruitment firm Michael Page, salary growth in the energy sector is stabilising; however, demand for highly qualified professionals, particularly in renewables, energy storage, and offshore projects, remains exceptionally strong. It continues to be a candidate-driven market, but primarily for individuals with unique technical expertise and proven project experience.

The fast-paced development of the energy sector, especially renewable energy sources, is pushing employers to seek candidates with increasingly broad and specialised skill sets. Engineers are in the highest demand, including installation designers, grid connection specialists, automation engineers, and SCADA experts, whose salaries in Warsaw typically range from approximately PLN 14,000-15,000 gross to PLN 19,000-21,000 for senior roles. According to Michael Page’s “Salary Guide 2026”, grid managers are also highly valued. Due to their critical role in connection processes, they can expect salaries exceeding PLN 20,000, with top-tier compensation reaching PLN 35,000. Developer and project-focused roles are also gaining importance. Land acquisition managers responsible for securing land for renewable investments earn, on average, around PLN 16,000, with experienced specialists reaching PLN 18,000. Wind project developers and renewable energy project managers earn between PLN 19,000 and 25,000, while offshore project roles command significantly higher rates, averaging PLN 31,000,





with upper ranges reaching PLN 34,000. Analytical competencies are also becoming increasingly valuable: energy market analysis managers and energy data experts earn between PLN 18,000 and 20,000, supporting companies in forecasting and optimising energy production and demand.

### **SALARY STABILISATION, BUT TOP SPECIALISTS STILL SET THE TERMS**

Michael Page's "Salary Guide 2026" indicates clear stabilisation in remuneration across the renewable energy sector. *"A few years ago, the market experienced rapid salary increases, and virtually every specialist could expect significant raises. Today, pay levels are levelling out, and companies increasingly prioritise experience and concrete technical competencies rather than potential alone,"* notes Antoni Komsta, Principal Consultant at Michael Page.

Job opportunities remain plentiful, but they are primarily targeted at candidates with experience in both project development and execution. Recruiting offshore wind experts remains particularly challenging, as the pool of professionals with relevant experience is still very limited.

*"Companies developing offshore projects often lack the time for long onboarding processes and need candidates ready*

*to step into projects immediately. As a result, they are willing to pay a premium for experienced experts. We observed the same dynamic earlier in the photovoltaic sector, where specialists were initially scarce, and the market rewarded them very generously,"* adds Antoni Komsta.

### **SOFT SKILLS AND BENEFITS GAIN IMPORTANCE AS SALARY GROWTH SLOWS**

With salary levels already high, employers increasingly compete for talent not only through pay but also through comprehensive benefits packages. Candidates place strong emphasis on flexible work models, work-life balance, and additional perks. In response, companies are offering subsidies for eco-friendly transport, support for installing home renewable systems, and extensive development programmes.

### **EDUCATION LAGGING BEHIND THE ENERGY TRANSITION**

Michael Page experts highlight that one of the sector's key challenges is the skills gap resulting from an education system that has not kept pace with the energy transition. *"Polish education and the labour market are not keeping up with the rapid development of renewable energy, particularly offshore. Outside the Tri-City and Szczecin, it is difficult to find universities that genuinely prepare students for work in this sector. Technical universities are only*

*beginning to adapt their programmes to the energy transition, and many curricula still rely on outdated technologies,"* says Antoni Komsta.

EU climate regulations are accelerating the energy transition, creating new investment opportunities and generating additional jobs. At the same time, the shortage of specialists means that some projects are being executed with the support of foreign companies. *"The energy transition can therefore be both an opportunity and a risk. Those who remain open to development and acquiring new competencies will benefit. For candidates who remain stuck in old patterns and resist learning, the transition may pose a risk to their position in the labour market,"* Komsta emphasises.

### **A CANDIDATE-DRIVEN MARKET - BUT NOT FOR EVERYONE**

The energy sector remains a candidate-driven market, particularly for individuals with unique technical skills and project experience. For candidates with shorter experience, competition is intensifying, and recruitment processes are becoming more selective. For highly specialised roles, such as substation engineers or power engineering experts, recruitment can take several months and typically concludes with a shortlist of carefully matched candidates.

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Report  
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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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