

# 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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## Łódź

Prepared  
in cooperation with



INVEST IN ŁÓDŹ

Michael Page

# Łódź



City area  
**293.25 sq km**



Population  
**642,530**  
(state of 30.06.2025, GUS)



Unemployment rate  
**5.5%**  
(state of 11.2025, GUS)



GDP growth  
**4.7%**



PKB per capita  
**PLN 70,846**



Average salary (gross)  
**PLN 8,455.98**  
(11.2025, GUS)

## Investment attractiveness

Rankings

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

for the Mayor of Łódź, Hanna Zdanowska, in the "Perły Samorządu 2025" ranking by Gazeta Prawna, in the category **"Best Mayor"** of a Municipality with over 100,000 inhabitants

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

in the **City Ranking of the Polish Association of Developers**

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

in the **City of The Year category**, 12<sup>th</sup> Europa Property Investment & Manufacturing Awards

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

in the category of cooperation with local universities and in the category of transport accessibility (rail), as well as three times **3<sup>rd</sup> place** for the quality of local universities, the availability of modern office space, and cooperation with the local investor support agency, according to the ABSL report.



distinction in the **"Innovative local government"** competition of the PAP Local Government Service for the innovative issue of "Green Bonds" for Łódź in the category of large cities



Prime Property Prize 2024 for Łódź: **Łódź is an investor-friendly city**



## Investment incentives

Know-how in key areas: regularly prepared reports in the field of HR and real estate and annual economic guide.

Other support in recruitment activities: internship programme organised by the Łódź City Council in cooperation with investors, activities in the field of employer branding.

Assigned employee of Łódź City Council (e.g. offering support for investments in the location selection process, in ongoing administrative processes in the office about related entities).

Personalized offer of investment areas (urban and private).

Marketing support: preparing press conferences, publications in social media (FB, LinkedIn, [www.investinlodz.pl](http://www.investinlodz.pl)).

Support within the Łódź Special Economic Zone.



# Łódź

Q1-Q4 2025



Existing stock  
● **643,000** sq m



Supply under construction  
● **0** sq m



Vacancy rate  
↓ **18.3%**



New supply  
● **0** sq m



Take-up  
▲ **52,000** sq m

## Standard lease terms in new buildings



Service charge  
PLN/sq m/month  
**16.00-29.00**



Rent-free period  
**1-1.5** months  
for each contract year



Fit-out budget  
EUR/sq m  
**350.00-500.00**

► Łódź is the sixth-largest office market in Poland, with total stock of 643,000 sq m. As in most regional cities, no new office buildings were delivered in 2025, which contributed to a decline in the vacancy rate to 18.3%. Furthermore, the absence of office space under construction is expected to sustain downward pressure on the vacancy rate in the coming quarters.

### SUPPLY

At the end of 2025, total office stock in Łódź stood at 643,000 sq m, accounting for approximately 5% of the national total. The vast majority of office buildings are concentrated in the city centre and the Widzew district.

Development activity in Łódź has effectively stalled. No new office buildings were completed in 2025, following a modest delivery of just 10,000 sq m in 2024. In addition, there are currently no office projects under construction, underscoring the subdued state of the city's development pipeline.

### TAKE-UP

Office take-up in Łódź in 2025 totalled nearly 52,000 sq m and was 13% lower than in the previous year. Notably, 27% of the total volume was attributable to a single transaction - an owner-occupier deal involving the Brama Miasta building, which was acquired in Q3 2025 by the Regional Government of the Łódź Voivodeship from Skanska.

This transaction also influenced the leasing structure, contributing to an increase in the share of owner-occupier leases to a record level of 27%. Overall, new leases accounted for 47% of total take-up, while renegotiations represented 21%. The remaining volume was attributable to expansions.

### VACANCY RATE

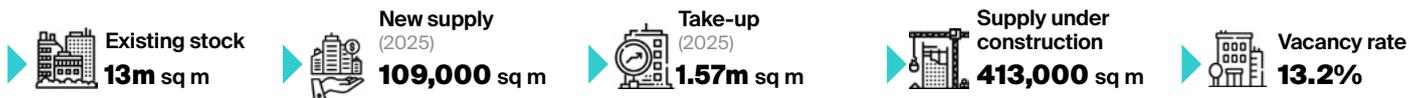
The vacancy rate in Łódź continued its downward trend and stood at 18.3% at the end of Q4 2025, marking the lowest level in four years. Vacancies decreased by 1.4 pp quarter-on-quarter and as much as 4.4 pp year-on-year. Given the absence of office projects under construction, the vacancy rate is expected to continue declining.

### RENTS

At the end of Q4 2025, headline asking rents in Łódź remained stable compared to the previous quarter, typically ranging from EUR 9.00 to 15.00/sq m/month. Service charges also remained unchanged, typically between PLN 16.00 and 29.00/sq m/month.

# Office market in Poland

Q4 2025



## SZCZECIN

190,000 sq m  
 6.4%  
 EUR 10-14.5

## POZNAŃ

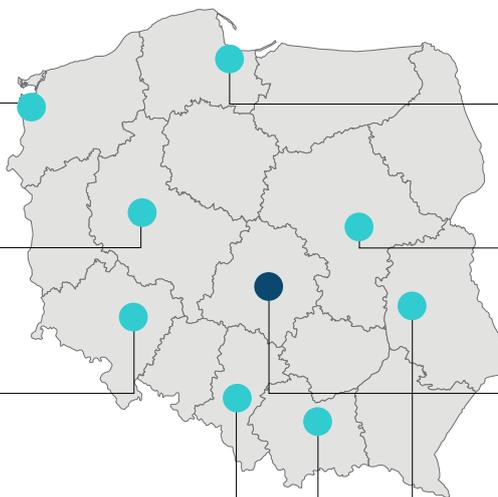
678,000 sq m  
 13.9%  
 EUR 11.5-16

## WROCŁAW

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

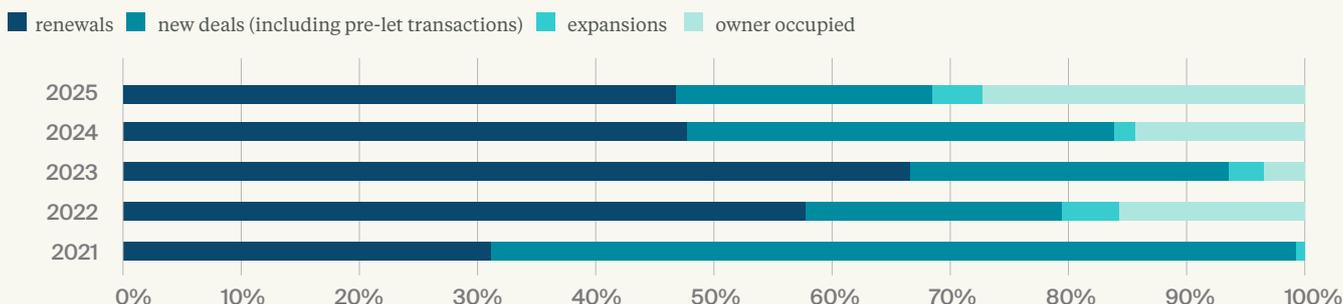
## Annual new supply, take-up and vacancy rate in Łódź



f-forecast based on schemes under construction

Source: Knight Frank

## Take-up structure in Łódź



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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