

# Strong cities



City attractiveness, office market, HR trends

H1 2023

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

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## ***Katowice***







Prepared  
in cooperation with



**KATOWICE**  
dla odmiany

**Michael Page**

# Katowice

-  **City area**  
**164.7 sq km**
-  **Population**  
**281,400** (Katowice)  
**2,279,600** (GZM)  
(02.2023, Statistics Poland)
-  **Population forecast**  
**261,050**  
(2030, Katowice)
-  **Unemployment rate**  
**1.1%**  
(06.2023, Statistics Poland)
-  **GDP growth**  
**4.7%**
-  **PKB per capita**  
**PLN 71,400**
-  **Average salary (gross)**  
**PLN 9,161.55**  
(in the business sector, 06.2023)



## Investment attractiveness

Rankings

**6<sup>TH</sup> PLACE** in the **"Top 10 Large European Cities of the Future 2023 - fDi Strategy"** ranking - attracting foreign direct investment (fDi Intelligence)

**1<sup>ST</sup> PLACE** in the ranking of **Business-Friendly Cities** of "Forbes" - cities and municipalities of 150,000 -299,000 inhabitants

**3<sup>RD</sup> PLACE** in the **"Polish Cities of the Future 2050"** ranking - in the sub-ranking of office, residential and "after hours" and **1<sup>ST</sup> place in the school category**

**TITLE:** **"European City of Science" 2024** awarded by EuroScience Association

## Investment incentives

The Investors Assistance Department is a special unit in the Katowice City Hall. It provides various services ranging from supporting investors who create business service centres, developers of the residential space, hotels and offices, to creating an ecosystem for start-ups and a friendly environment for the SME sector.

Providing investors with support based on their individual expectations and requirements: preparing market analyses, information on investment locations, offering image-building assistance, organising investors' visits, coordinating cooperation with universities, etc.

Katowice Special Economic Zone - the best in Europe and one of the best in the world (fDi Intelligence), offering income tax exemptions.

Structured educational projects to support the development of talent in the city from secondary school to higher education: P-TECH, Corporate Readiness Certificate (CRC).

A chance to invest inside a centre that has been implementing sustainable development policies based on Agenda 2030, UN.

## Quality of life

Rankings

**1<sup>ST</sup> PLACE** in Business Insider's ranking - **Best city to live**

**2<sup>ND</sup> PLACE** in the "Europolis" ranking of the Schuman Foundation for **the most ecological Polish cities**

**1<sup>ST</sup> PLACE** for the **Culture Zone** in the "Top Municipal Investment of the Decade" poll of Portal Samorządowy

**2<sup>ND</sup> PLACE** in **"Electromobile Cities Ranking"** by Polityka Insight

**6<sup>TH</sup> PLACE** in Poland among cities with more than 100,000 residents in terms of **quality of life** assessment in the "Newsweek" ranking

**silver award for sustainable development**, in the category of cities with more than 400,000 daily population, in The International Awards for Liveable Communities LivCom Awards 2023

## Quality of life in numbers

- Implementing the 17 UN Sustainable Development Goals and the objectives of the Development Strategy City 2030 - equitable transformation, climate change and equity.
- Green urban transportation: 20 electric buses, 22 autobusy hybrydowe i 8 gazowych (w 2023 r.), 147 EV charging points, 69 charging stations.
- Connecting residential and service areas in Katowice - PLN 200m and an investment to improve the safety of road users in Katowice - PLN 30m (projects subsidised by the RFPL Strategic Investment Programme).
- Construction of a new tramway (the final stage).
- Katowice Intelligent Transportation System - the system of adjusting traffic lights to the current traffic volume - PLN 85m (PLN 67m comes from EU funding).
- District of New Technologies: Katowice gaming and technology HUB and development of the Poniowski mining shaft area (stage 4) - PLN 26.9m (documentation), implementation of the investment is worth over PLN 600m.
- Construction of a photovoltaic farm - PLN 5.7m.
- Construction of a municipal stadium in Katowice - PLN 289m.
- Construction of the Jerzy Kukuczka Himalayan Centre - PLN 2.9m - documentation.
- Katowice "Kilar's House" Music Education Centre - PLN 17.8m.
- Witos' Cultural Center and park - PLN 28.6m.
- Construction and modernisation of city parks in Katowice - PLN 48m, (co-financed by the RFPL Strategic Investment Programme). Greening Warszawska Street - PLN 18m, greening of Plac Sejmu Śląskiego - PLN 5.2m.
- Development of the area around Starganiec pond - PLN 7.2m.
- Katowice Resident Card - 109,820 active cards.
- Participatory Budgeting - over PLN 20m and Green Budget - PLN 3m.

 **Bike paths**  
**185 km**

 **Green areas**  
**50%** of the city's area

## Facts & Figures


-  **Number of students**  
**50,864** (Katowice)  
**89,907** (GZM)
-  **Number of graduates**  
**12,410** (Katowice)  
**22,002** (GZM)
-  **Number of universities**  
**11** (Katowice)  
**18** (GZM)
-  **Airport - distance to the City centre**  
**30 km**
-  **Airport - number of passengers**  
**4,419,090** (2022)
-  **BSS sector - number of centres**  
**96** (Katowice)  
**126** (GZM)
-  **BSS sector - number of employed**  
**24,400** (Katowice)  
**29,700** (GZM)



# Katowice


H1 2023

 Existing stock  
**725,800 sq m**

 Supply under construction  
**86,400 sq m**

 Vacancy rate  
**20.1%**

 New supply  
**0 sq m**

 Take-up  
**24,900 sq m**

At the end of Q2 2023, the stock of office space in Katowice amounted to almost 725,800 sq m. No new office project was delivered in H1 2023.

Developers, however, remain active and at the end of June 2023, some 86,400 sq m of office space was under construction - the second highest figure among regional cities. In the remaining quarters of 2023, 35% of the space under construction is expected to be delivered to the Katowice office market, with the remaining amount expected to reach the market in 2024 and 2025. The projects still under construction are the Craft building (26,700 sq m, Ghelamco Poland), and the Eco City Katowice complex (18,000 sq m, Górnośląski Park Przemysłowy).

In H1 2023, demand for office space in Katowice amounted to just under 25,000 sq m - 7% of the total volume of agreements signed in regional cities, and some 43% down on the figure recorded in 2022's corresponding period. At over 46%, renegotiations made up the largest share of Katowice's H1 2023 transaction structure, with new agreements accounting for 34% of the leased volume, and expansions the remaining 20%. In Q2 2023, leases were signed for just 5,700 sq m.


Due to the low demand recorded in Q2 2023 in Katowice, the vacancy rate increased by 3 p.p. At the end of June 2023, the figure stood at 20.1% (up 4 p.p. on the same period in 2022). This is the second highest result recorded in regional cities, just behind Łódź, where the rate is 23.4%.


Asking rents in Katowice at the end of June 2023 ranged from EUR 8.00 to EUR 14.50/sq m/month. Persistently high construction costs, along with the still high costs of servicing construction loans, are limiting investor negotiating possibilities. Thus, rent increases, particularly in new buildings, remain a possibility. Service charge rates ranged from PLN 14.00 to PLN 27.00/sq m/month.

## Coworking operators in Katowice

City Space | Regus  
Własne B. | Cluster Offices












## Standard lease terms in new buildings

 Service charge  
PLN/sq m/month  
**14.00-27.00**

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



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

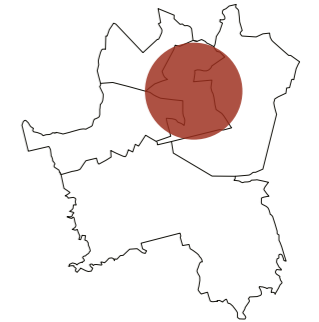
## Selected schemes under construction

CRAFT	ECO CITY KATOWICE	GRUNDMANNA OFFICE PARK A
 26,700 sq m	 18,000 sq m	 20,650 sq m
 Q3 2023	 2023/2024	 2025
 Ghelamco Poland	 GPP	 Cavatina Holding
 Total office space	 Completion date	 Developer / Owner

## Office space

Major concentration areas

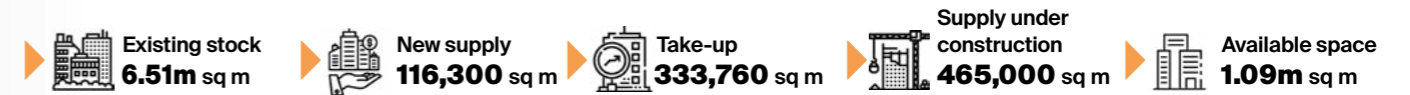
	EXISTING STOCK	SUPPLY UNDER CONSTRUCTION	VACANCY RATE	MONTHLY ASKING RENT
 City Centre	369,400 sq m	50,700 sq m	16.7%	EUR 8-14.5 sq m
 Outside City Centre	356,400 sq m	35,700 sq m	23.6%	EUR 8-13.5 sq m



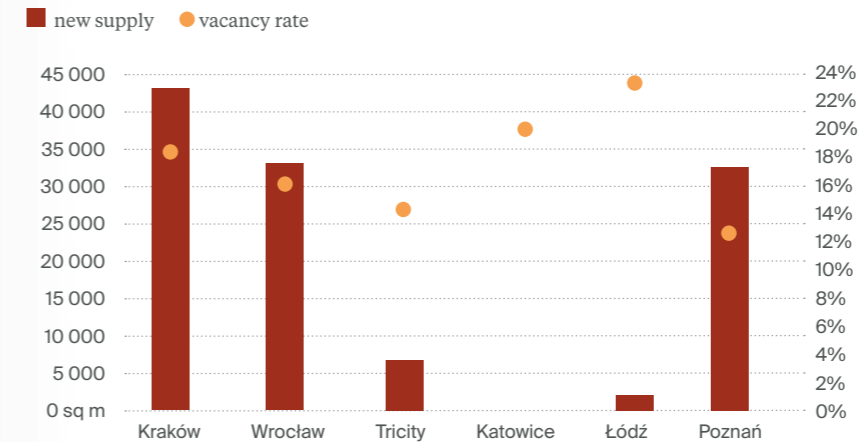
## Major regional cities

H1 2023

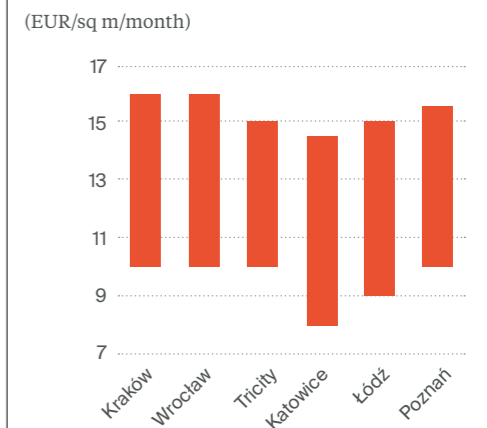
Kraków, Wrocław, Tricity, Katowice, Łódź, Poznań, Szczecin, Lublin



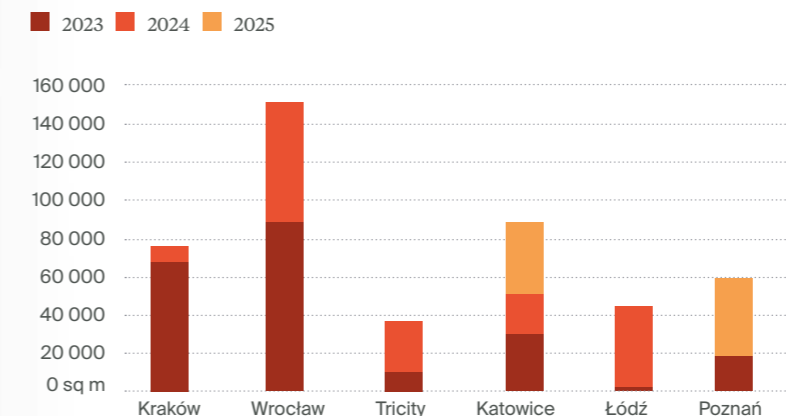
### New supply and vacancy rate (H1 2023)



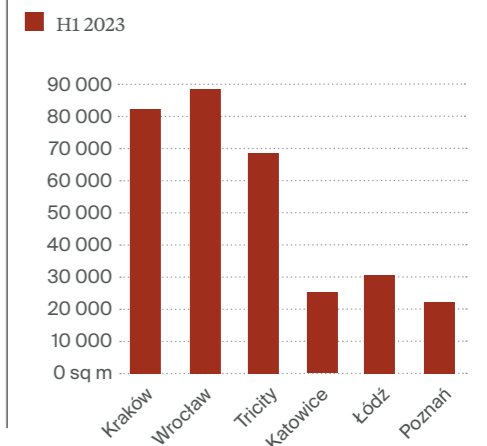
### Asking rents (H1 2023)



### Supply under construction by completion year (H1 2023)



### Take-up volume



# Talent Trends 2023: a complete transformation of workplace culture

80% of people who have started a new job throughout the last year are open to new opportunities. The factors that have the greatest impact on candidates when choosing a new place of employment are salary (26%), flexibility (15%), and career growth (14%). This is clear to see in the Talent Trends 2023 survey, carried out by PageGroup experts on a group of Polish respondents.

## Employees ready and willing to look for new opportunities

Employees are increasingly more open to change and are very flexible. Of the nearly 1,000 people who took part in the Talent Trends survey in Poland, 94% of respondents admitted to being ready for new professional challenges, and more than half said they were actively looking for a job or planning to look for it in the next six months. Interestingly, this attitude can be seen even in those employees who are satisfied with both their current employer and earnings.

## The salary is the strongest motivator for change

These days, remuneration is the most common reason for quitting, the most frequent reason for accepting a new position, the key component of a job advertisement, and the core of the recruitment process.

## Flexibility is the new basis

Employers should adapt their mindset to the new reality, prioritising work-life balance and staff well-being. 7 out of 10 people would choose mental health and work-life balance over professional success.

## Career growth: the key element of the recruitment strategy

37% of employees claimed they prioritised those companies that invest in the career growth of their staff. Professional development plans should be clearly communicated and consistent with the culture of the organisation. In order to improve employees' loyalty, it is worth developing a transparent promotion path that will have a specific time frame.



► For more information on the transformation of workplace culture, make sure to read the findings of our latest [Talent Trends 2023 survey](#).

## The ins and outs of the labour market in the SSC sector

in Poland

Over the last couple of years, global business has focused on transformations related to the digitisation and streamlining of processes. Poland has become one of the key beneficiaries of this trend, which proves its attractiveness. A large number of talented and competent candidates in our country is the main factor that helps to draw new investors toward it.

Here are the 5 major trends in the SSC sector that determine the trajectory of changes in the labour market in 2023:

### Experienced recruiters = effective recruitment

In the face of stiff competition for candidates with specialist expertise, effective communication and recruiter experience are of primary significance. By understanding the mechanisms that take place in the labour market, recruitment consultants can effectively respond to the needs of both employers and candidates.

### 20 days

A candidate's activity cycle on the market is a maximum of 20 days, and it results from the increased number of job offers received. Greatest effectiveness and best competitive advantage are achieved by those employers who cut down their recruitment to a maximum of 2 stages.

### Building your own brand in conversations with candidates

As many as 77% of candidates are guided by the company's image on the market before deciding to take up a job. In 2023, meetings with candidates are crucial to show the values and position of the organisation.

### Market diversification

Apparently, more and more strategic functions are being centralised these days. In 2022, roles in such areas as supply chain, purchasing, and human resources dominated in southern Poland, while positions in the controlling and financial analysis departments prevailed in the north. The trend is due to continue this year.



## TOP 4

The most desired positions in the SSC sector:

- 1 ► **FP&A Expert:**  
**PLN 12,000 – 19,000**  
gross/monthly
- 2 ► **Process Excellence Lead:**  
**PLN 16,000 – 22,000**  
gross/monthly
- 3 ► **Procurement/Supply Chain Specialist:**  
**PLN 10,000 – 15,000**  
gross/monthly
- 4 ► **Reporting/Management Accounting:**  
**PLN 12,000 – 18,000**  
gross/monthly

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Investors Assistance Department is a dedicated unit of the Katowice City Hall, which provides comprehensive services: from supporting business services investors, residential and commercial developers, to creating a friendly environment for start-up and the SMEs sector. Investors Assistance Department focuses on providing solutions customized to the needs of investment projects. Thanks to a wide range of innovative products an experienced team of experts supports investors in achieving their business goals in Katowice and in gaining and maintaining a competitive advantage.

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