The Strength of Cities

City attractiveness, office market, HR trends

H1 2026	The office market sentiment, the investment potential of the city and the labour market.	*knightfrank.com.pl/en/research*

Prepared in cooperation with

KATOWICE *for a change*

Michael Page

Katowice

City area
164.7 sq km

Population
277,900
(Katowice, GUS 06.2025)
2,113,023
(GZM, InfoGZM 2024)

Population forecast
261,050
(2030)

Unemployment rate
1.8%
(05.2026, GUS)

GDP growth
3.6%

GDP per capita
PLN **97,509**

Average salary (gross)
PLN **11,357.33**
(in the business sector, 06.2026, GUS)

Investment attractiveness

Rankings

9TH PLACE in the **"Top 10 Large European Cities of the Future 2025 – fDi Strategy"** City's strategy for attracting foreign direct investment (fDi Intelligence)

2ND PLACE in the ranking of **Business-Friendly Cities** of "Forbes" - cities and municipalities of 150,000 - 299,000 inhabitants

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

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

CERTIFICATE: **"Standards of Investor Service in Local Government"**

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: FujitsuTech, Kyndryl Future Achievers, Technologiczny Kompas Kariery (Sopra Steria), CivicPUNK, 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

1ST PLACE in Business Insider's ranking **- Best city to live in Poland**

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

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

2ND PLACE among cities with over 100,000 residents in the **"Perły Samorządu 2025"** (Pearls of Local Government 2025) ranking

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

Silver Award at the LivCom Awards 2024 in the category Technology and Solution Project, as part of the LivCom Awards for Sustainable Development Goals – The International Awards for Liveable Communities

Quality of life in numbers

- Implementationof the 17 UN Sustainable Development Goals and the goals of the City Development Strategy.
- Katowice 2030 – fair transformation, climate change and equity.
- Green urban transport: 43 electric buses, 22 hybrid buses and 8 CNG buses; 257 EV charging points for electric cars.
- Katowice Resident Card – 160,794 registered cards.
- Participatory Budgeting – over PLN 20m, including the Green Budget – PLN 3m.

Selected investment projects in progress:

- Selected investment projects under implementation:
- Strategic project – District of New Technologies – Katowice Gaming and Technology HUB – PLN 909.6m
- District of New Technologies – development of the Poniatowski mining shaft area (documentation) – PLN 1.6m
- Tram to the South + Mobile Metropolis – Katowice Integrated Transfer Hub System – PLN 212.3m
- Construction of the Jerzy Kukuczka Himalayan Centre – PLN 100.88m
- Katowice “Kilar’s House” Music Education Centre with a permanent exhibition – PLN 22.66m
- Modernisation of infrastructure at the Muchowiec Airport – PLN 33.6m
- Construction of two municipal swimming pools in Katowice – PLN 79.0m

Length of cycling infrastructure
208.9 km

Green areas
40% of the city's area

Facts & Figures

Number of students
50,321 (Katowice)
92,817 (GZM)

Number of graduates
12,162 (Katowice)
23,377 (GZM)

Number of universities
12 (Katowice)
19 (GZM)

Airport - distance to the city centre
30 km

Airport - number of passengers
3.2m (H1 2026)

BSS sector - number of centres
165 (Katowice and GZM)

BSS sector - number of employed
38,700 (Katowice and GZM)

Katowice

H1 2026

Existing stock
728,000 sq m

Supply
under construction
20,400 sq m (-39,3% YoY)

Vacancy rate
22.2% (-0.5 p.p. YoY)

New supply
2,700 sq m (+100% YoY)

Take-up
35,400 sq m (+51.0% YoY)

Coworking operators in Katowice

City Space | Regus
Własne B. | Cluster Offices

Standard lease terms in new buildings

Service charge
PLN/sq m/month
14.00-26.00

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

Fit-out budget
EUR/sq m
350.00-500.00

Katowice is the fifth-largest office market in Poland, with a total office stock of 728,000 sq m, representing approximately 6% of the country's office inventory. Development activity remains limited following the exceptionally strong supply wave delivered in 2022, when 127,000 sq m of new office space entered the market, accounting for nearly 20% of the city's total stock. Demand has remained relatively stable, with the five-year average take-up standing at approximately 56,000 sq m per annum. In H1 2026, tenant activity strengthened, with leasing volume exceeding 35,000 sq m, up 51% year-on-year. Nevertheless, the vacancy rate remained stable, while rental levels held firm without any significant changes.

SUPPLY

Development activity in the Katowice office market remains subdued. In Q2 2026, the Chorzowska 111 office building (2,656 sq m, developed by RB Property) was completed and delivered to the market.

At the end of the quarter, approximately 20,000 sq m of office space remained under construction, of which nearly 9,000 sq m is scheduled for completion by the end of 2026 within Cross Office A, a scheme being developed by Opal Maksimum.

TAKE-UP

In Q2 2026, leasing activity in the Katowice office market reached almost 25,100 sq m, marking a fivefold increase year-on-year. This was also the strongest quarterly result recorded in the market over the past three years.

Total take-up in H1 2026 amounted to 35,400 sq m, representing a 51% increase compared with the same period of 2025 and confirming a rebound in occupier demand.

Lease renewals dominated transaction activity in the first half of the year, accounting for 53% of total take-up. New leases represented 42%, while expansions accounted for the remaining 5%.

The IT and manufacturing sectors were the most active occupier groups, each contributing 23% of total leasing volume. Notably, the share of the manufacturing sector increased significantly from 9% in 2025 to 23% in 2026. The business services sector ranked third, accounting for 9% of total take-up.

VACANCY RATE

Despite the significant increase in leasing activity during Q2 2026, the vacancy rate remained stable at 22.2% at the end of the quarter. This was primarily driven by the delivery of new office space and the predominance of renewals within the leasing structure.

The completion of additional office projects over the coming quarters may place further upward pressure on the vacancy rate.

RENTS

At the end of Q2 2026, headline office rents in Katowice remained stable, typically ranging between EUR 10.00 and EUR 14.50 per sq m per month.

Service charges also remained unchanged, generally falling within the range of PLN 14.00 to PLN 26.00 per sq m per month.

Office market in Poland

H1 2026

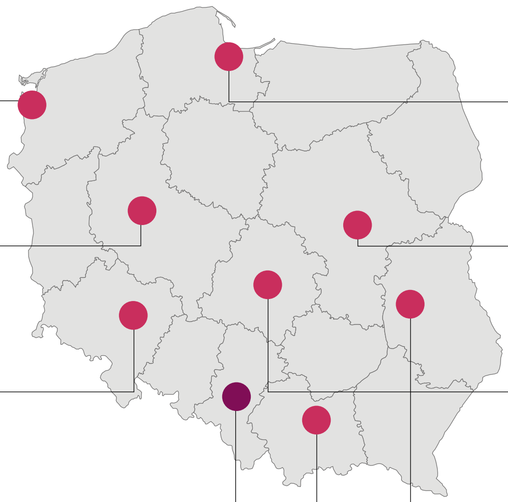
Existing stock 13m sq m

New supply (H1 2026) 119,000 sq m

Take-up (H1 2026) 724,000 sq m

Supply under construction 153,000 sq m

Vacancy rate 13.1%



SZCZECIN
182,000 sq m
8.4%
EUR 10-14.5

POZNAŃ
678,000 sq m
11.5%
EUR 11.5-16

WROCŁAW
1.35m sq m
21.8%
EUR 11-16

KATOWICE
728,000 sq m
22.2%
EUR 10-14.5

TRICITY
1.08m sq m
10.4%
EUR 11-16

WARSAW
6.24m sq m
8.5%
EUR 12-32

ŁÓDŹ
651,000 sq m
19.8%
EUR 9-15

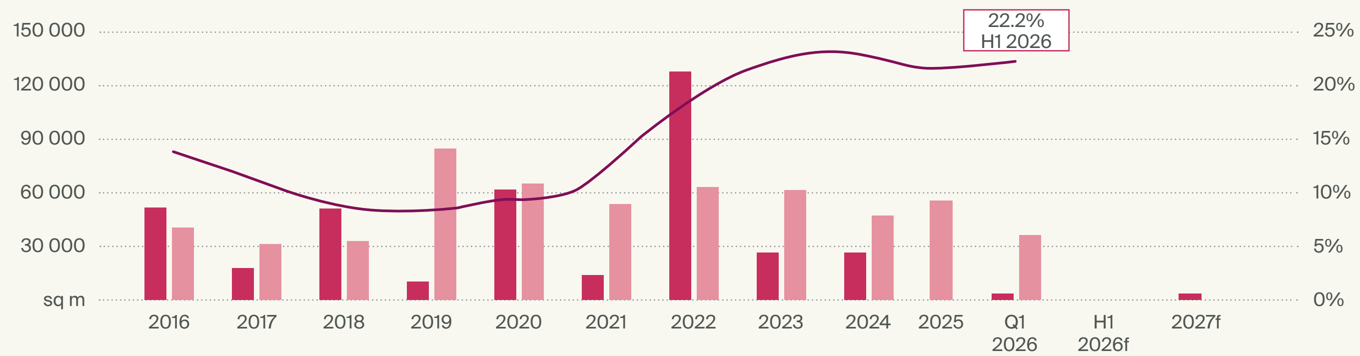
LUBLIN
225,000 sq m
10.5%
EUR 9-13

KRAKOW
1.87m sq m
19.0%
EUR 10-18

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

Source: Knight Frank

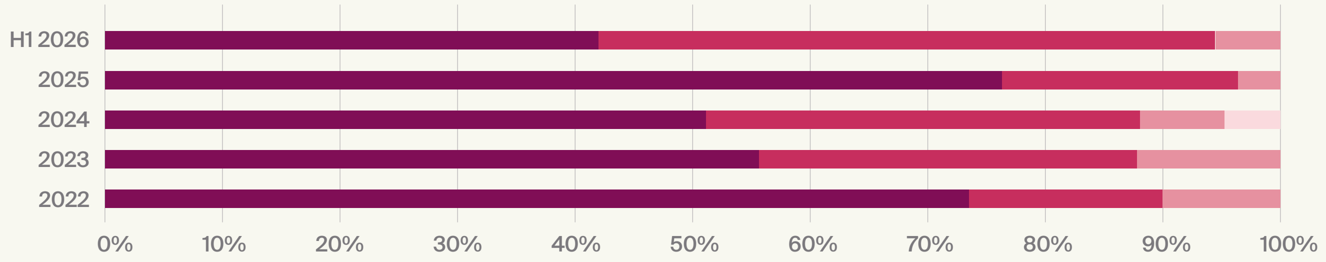
Annual new supply, take-up and vacancy rate in Katowice



f-forecast based on schemes under construction

Source: Knight Frank

Take-up structure in Katowice



Source: Knight Frank

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Nearshoring as a catalyst for evolving skills and new market demands

Nearshoring has become one of the defining forces reshaping European industry. As geopolitical uncertainty continues to prompt organisations to strengthen the resilience of their supply chains, relocating manufacturing and operational activities closer to end markets has evolved from a strategic consideration into a commercial imperative. Supported by its mature infrastructure and strategic location, Poland has firmly established itself as one of Europe's principal beneficiaries of this structural shift.

The scale of this transformation is reflected in the logistics sector, where modern warehouse stock surpassed 37 million square metres in 2026 - exceeding the combined capacity of the Czech Republic, Romania and Hungary. Yet buildings alone do not create competitive advantage. As increasingly sophisticated production and operational functions move closer to customers, the decisive factor becomes access to leadership and specialist expertise capable of managing far more complex business environments. Human capital has become as critical to investment success as physical infrastructure.

THE EVOLUTION OF INDUSTRIAL LEADERSHIP

The profile of industrial leadership has undergone a profound transformation. Manufacturing and supply chain executives are no longer judged solely by operational excellence; they are increasingly expected to shape corporate strategy, improve profitability and translate operational performance into sustainable enterprise value.

This shift coincides with a broader transformation across Polish businesses. As many organisations navigate generational succession, demand is rising for leaders who combine commercial judgement with the ability to lead organisational change, build resilient teams and develop long-term succession strategies.

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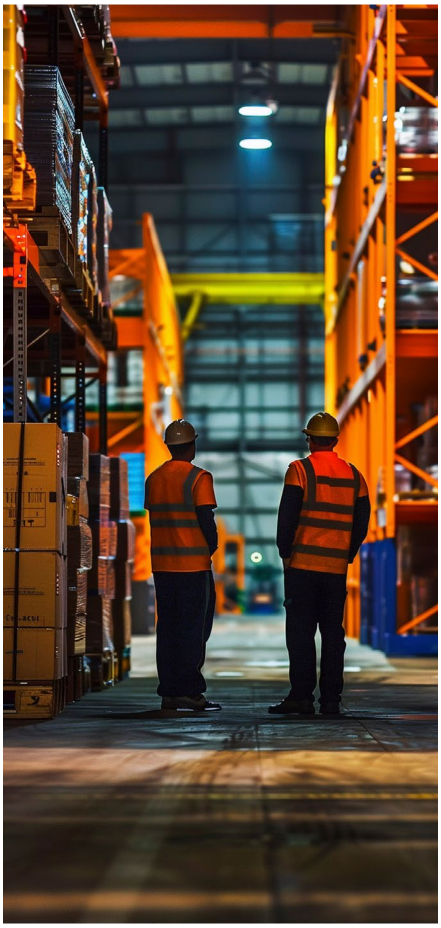
THE COST OF DELAYED HIRING

These changing expectations are reshaping executive recruitment. Faced with ongoing economic uncertainty, organisations have become significantly more cautious when appointing senior leaders. Recruitment processes now involve additional assessment stages, extensive market mapping and increasingly rigorous benchmarking.

Caution, however, comes at a cost. In a market where experienced industrial executives remain scarce, lengthy recruitment processes frequently result in the strongest candidates accepting competing opportunities. Our experience at Michael Page consistently demonstrates that organisations capable of combining thorough



"In a market where experienced industrial executives remain scarce, lengthy recruitment processes frequently result in the strongest candidates accepting competing opportunities. "

evaluation with decisive action are those most likely to secure exceptional leadership talent.

A NEW GEOGRAPHY OF TALENT

Nearshoring is increasingly aligning investment decisions with talent availability rather than infrastructure alone. While established hubs such as Warsaw, Wrocław, Łódź and the Silesian region remain central to Poland's industrial landscape, investors are also looking towards emerging regions with distinctive human capital advantages.

West Pomerania offers an attractive combination of quality of life and executive mobility. The Tri-City region benefits from the convergence of advanced business services, manufacturing and logistics, creating a deep pool of internationally experienced leaders. Meanwhile, the Lublin region provides a strong academic ecosystem and relatively untapped labour market, enabling businesses to build sustainable operations without entering an aggressive competition for talent.

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As nearshoring continues to redefine Europe's industrial landscape, access to leadership capability—not simply location - will increasingly determine which organisations and regions are best positioned for long-term growth.

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As one of the largest and most experienced research teams operating across Polish commercial real estate markets, Knight Frank Poland provides strategic advice, forecasting and consultancy services to a wide range of commercial clients including developers, investment funds, financial and corporate institutions as well as private individuals. We offer:

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- market reports and analysis available to the public,
- 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, Krakow, 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.

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INVESTORS ASSISTANCE DEPARTMENT

www.invest.katowice.eu
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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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