

# 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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## Katowice

Prepared  
in cooperation with



**KATOWICE**  
for a change

**Michael Page**

# Katowice



City area  
**164.7 sq km**



Population  
**278,900**  
(Katowice, GUS 06.2025)  
**2,128,034**  
(GZM, InfoGZM 2023)



Population forecast  
**261,050**  
(2030)



Unemployment rate  
**1.2%**  
(06.2025, GUS)



GDP growth  
**18.0%**



PKB per capita  
**PLN 85,131**



Average salary (gross)  
**PLN 11,207.23**  
(in the business sector,  
06.2025, GUS)

## Investment attractiveness

Rankings

**9<sup>TH</sup>**  
**PLACE**

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

**2<sup>ND</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

**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: FUJITSU-Tech, KYNDRYL Future Achievers, 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

**4<sup>RD</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

- Implementation of 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: 28 electric buses, 22 hybrid buses and 8 CNG buses; 197 EV charging points for electric cars.
- Katowice Resident Card – 150,234 active cards.
- Participatory Budgeting – over PLN 20m, including the Green Budget – PLN 3m.

Selected investment projects in progress:

- District of New Technologies – Katowice Gaming and Technology HUB – PLN 650m.
- District of New Technologies – development of the Poniatoski mining shaft area, stage 6 (documentation) – PLN 2.7m.
- Construction of the Jerzy Kukuczka Himalayan Centre – PLN 82.8m.
- Katowice Integrated Transfer Hub System – “Św. Jana” hub – PLN 7.4m.
- Katowice Integrated Transfer Hub System – “Kostuchna” hub – PLN 87.3m.
- Katowice "Kilar's House" Music Education Centre and a permanent exhibition – PLN 22.1m.
- Restoration of the wooden Church of St. Michael the Archangel in Kościuszko Park – construction and conservation works – PLN 10.8m.
- Modernisation of infrastructure at the Muchowiec Airport – completion of runway construction – PLN 19.3m.



**Length of cycling infrastructure**  
**206.35 km**



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

## Facts & Figures



**Number of students**  
**50,123** (Katowice)  
**92,522** (GZM)



**Number of graduates**  
**12,173** (Katowice)  
**22,901** (GZM)



**Number of universities**  
**12** (Katowice)  
**19** (GZM)



**Airport - distance to the city centre**  
**30 km**



**Airport - number of passengers**  
**3.0m** (H1 2025)



**BSS sector - number of centres**  
**156** (Katowice and GZM)



**BSS sector - number of employed**  
**36,800** (Katowice and GZM)

# Katowice

H1 2025



Existing stock  
**↓ 761,000 sq m**



Supply under construction  
**● 34,000 sq m**



Vacancy rate  
**↑ 22.7%**



New supply  
**● 0 sq m**



Take-up  
**↑ 23,000 sq m**

## 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**

► The total office space in Katowice currently amounts to 761,000 sq m, representing approximately 6% of Poland's total office stock. In the first half of 2025, take-up for office space weakened, reaching 23,000 sq m, which also contributed to an increase in the vacancy rate to 22.7%. Asking rental rates remained stable, typically ranging from EUR 10.00 to 14.50/sq m/month.

### SUPPLY

As of the end of June 2025, the office stock in Katowice amounted to 761,000 sq m, maintaining its position as the fourth largest regional city in Poland. Since the beginning of the year, no new office buildings have been delivered to the market, while nearly 34,000 sq m remains under construction. If developers meet their deadlines, all of this space will be completed and delivered by the end of 2025. The largest ongoing projects include the Eco City Katowice complex, with a total area of 18,000 sq m, developed by Górnośląski Park Przemysłowy, and the Cross Office A building, offering nearly 9,000 sq m, developed by Grupa Opal.

### TAKE-UP

In the first half of 2025, take-up for office space in Katowice reached nearly 23,000 sq m. However, in the second quarter alone, only 4,000 sq m was leased, one of the lowest quarterly results in the history of the market.

In the first half of 2025, new lease agreements continued to dominate the Katowice market, accounting for 71% of the total leased volume. Renegotiations remained significant, representing 24%, while expansions accounted for the remaining 5%.

### VACANCY RATE

Weakened demand in Q2 2025 contributed to an increase in the vacancy rate in Katowice, which reached 22.7%. This represents an increase of 1.6 pp compared to the previous quarter and 1.9 pp year-on-year. Katowice currently records the highest vacancy rate among all office markets in Poland. However, due to the relatively limited volume of office space under construction, it is expected that the vacancy rate will begin declining in the long term.

### RENTS

By the end of Q2 2025, asking rents in Katowice remained stable, typically ranging from EUR 10.00 to 14.50/sq m/month. Service charge also held steady and ranged between PLN 14.00 and 26.00/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

## WROCŁAW

1.36m sq m  
20.5%  
EUR 11-16

## KATOWICE

761,000 sq m  
22.7%  
EUR 10-14.5

## TRICITY

1.07m sq m  
12.7%  
EUR 11-16

## WARSAW

6.33m sq m  
10.8%  
EUR 10-28

## ŁÓDŹ

643,000 sq m  
21.6%  
EUR 9-15

## LUBLIN

221,000 sq m  
10.4%  
EUR 9-13

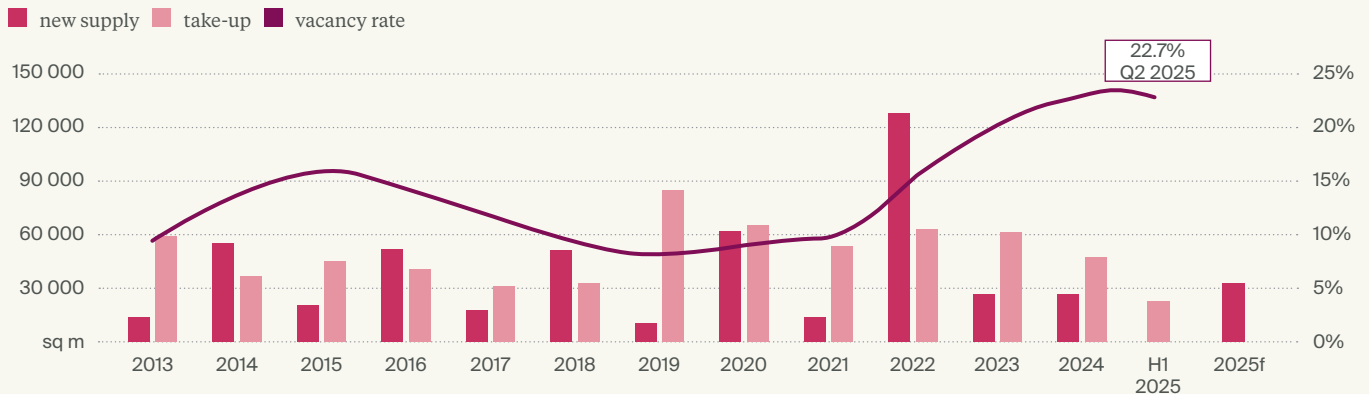
## KRAKOW

1.83m sq m  
17.3%  
EUR 10-18

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

Source: Knight Frank

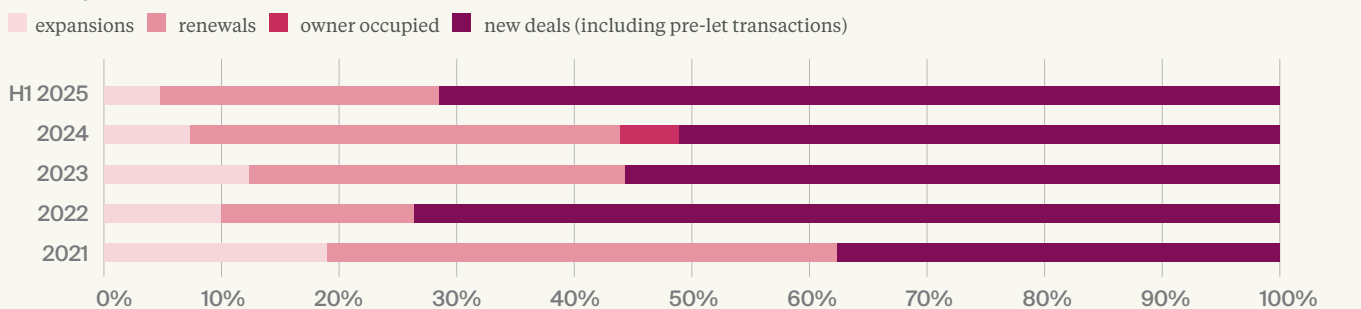
## Annual new supply, take-up and vacancy rate in Katowice



f-forecast based on schemes under construction

Source: Knight Frank

## Take-up structure in Katowice



Source: Knight Frank



# 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 area<sup>1</sup>. 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 women<sup>2</sup>. 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

<sup>1</sup> 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 workforce<sup>3</sup>. 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.

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

<sup>3</sup> 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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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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