

Strong cities



City attractiveness, office market, HR trends

Q3 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
1.5%
(09.2025, GUS)



GDP growth
18.0%



PKB per capita
PLN 85,131



Average salary (gross)
PLN 9,640.75
(in the business sector,
09.2025, 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: 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

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 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 – 153,279 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 Poniatowski 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
40% 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

Q3 2025



Existing stock
↓ 742,000 sq m



Supply under construction
● 34,000 sq m



Vacancy rate
↑ 23.4%



New supply
● 0 sq m



Take-up
↑ 32,000 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 stock in Katowice currently amounts to 742,000 sq m, representing nearly 6% of Poland's total office supply. Take-up for office space in Katowice weakened in the second and third quarters, resulting in an increase in the vacancy rate, which reached 23.4% at the end of Q3. Headline rental rates remain stable, typically ranging between 10 and 14.50 EUR/sq m/month.

SUPPLY

Developer activity in Katowice remains limited, with no new office completions recorded between January and September 2025. Nonetheless, approximately 34,000 sq m of modern office space is currently under construction across four projects. The largest of these is the Eco City Katowice complex, a development by the Upper Silesian Industrial Park, which will deliver a total of 18,000 sq m upon completion.

TAKE-UP

Between January and September 2025, office leasing activity in Katowice totalled approximately 32,000 sq m, representing just 6% of overall take-up across Poland's regional office markets. The majority of this volume was recorded in the first quarter, which saw nearly 18,500 sq m transacted, while the third quarter registered a notable slowdown, with less than 9,000 sq m leased.

As of the end of September 2025, new leases continued to dominate the Katowice market, representing 66% of total take-up. Renewals still played an important role, accounting for 30%, while expansions made up the remaining 4%. The IT sector remained the leading source of demand, responsible for 37% of total leasing activity.

VACANCY RATE

In Q3 2025, the vacancy rate in Katowice increased to a record-high level of 23.4%. This marks a rise of 0.7 pp compared to the previous quarter and as much as 2.9 pp year-on-year. The upward movement was primarily driven by subdued demand observed over the past two quarters.

Given the relatively small volume of office space currently under construction, the vacancy rate is expected to gradually decrease in the longer term.

RENTS

Headline rents in Katowice remained stable at the end of Q3 2025, typically ranging between 10.00 and 14.50 EUR/sq m/month. Service charges also stayed at a similar level to the previous quarter, generally ranging from 14.00 to 26.00 PLN/sq m/month.

Office market in Poland

Q3 2025



SZCZECIN

190,000 sq m
6.8%
EUR 10-14.5

POZNAŃ

675,000 sq m
13.6%
EUR 11.5-16

WROCŁAW

1.34m sq m
21.8%
EUR 11-16

KATOWICE

742,000 sq m
23.4%
EUR 10-14.5

TRICITY

1.07m sq m
11.9%
EUR 11-16

WARSAW

6.25m sq m
9.7%
EUR 12-32

ŁÓDŹ

643,000 sq m
19.7%
EUR 9-15

LUBLIN

225,000 sq m
10.3%
EUR 9-13

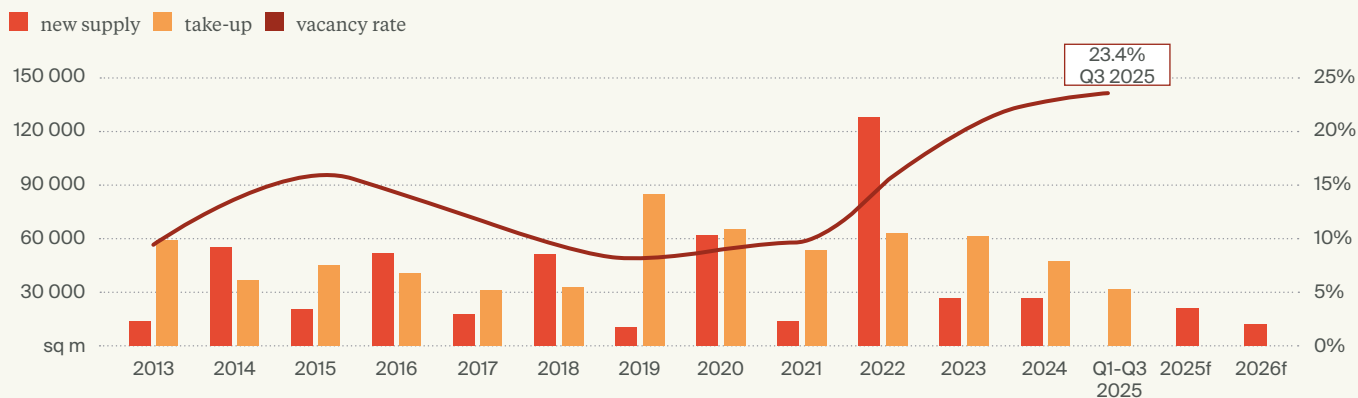
KRAKOW

1.85m sq m
18.6%
EUR 10-18

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

Source: Knight Frank

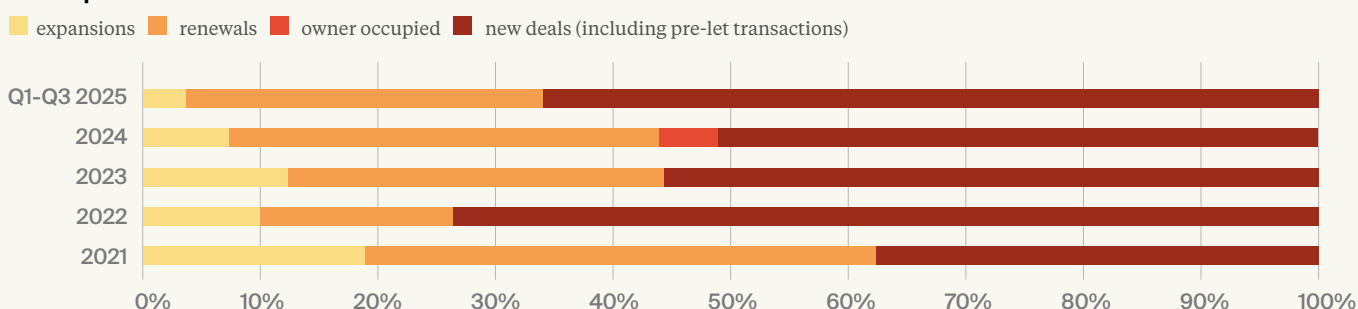
Annual new supply, take-up and vacancy rate in Katowice



f-forecast based on schemes under construction

Source: Knight Frank

Take-up structure in Katowice



Source: Knight Frank

Michael Page Salary and Labour Market Trends Review 2026: Salaries Under the Microscope – The Labour Market in the Era of Stability

- Stability has returned to the Polish labour market, yet both employees and businesses have become more cautious. Double-digit pay rises when changing employers are now rare, and wage growth depends largely on the role and market conditions. According to the Michael Page Talent Trends 2025 report, only 34% of professionals are actively seeking new employment. In shortage areas such as finance and IT, particularly in areas of restructuring, process optimization, cybersecurity, and big data analytics, candidates still hold the upper hand. However, in most sectors, the market increasingly favours employers.

After a period of change and unpredictability, the Polish labour market has entered a phase of relative stability. Companies, operating amid economic and geopolitical uncertainty and lower inflation, are shaping their pay policies more cautiously. Therefore, according to Michael Page experts, we should not expect a return to double-digit pay rises based solely on changing employers. Instead, pay adjustments are more likely to reflect specific roles and market realities. While candidates still maintain strong bargaining power in shortage roles, the balance is shifting in most industries towards employers.

This shift is clearly visible in recruitment processes. Candidates who in recent years grew accustomed to inflation-driven pay rises of 20–30% are now unlikely to change jobs for a modest 5–10% increase. A 30% pay rise, however, remains a strong motivator. The Talent Trends 2025 report also confirms that only 34% of professionals are actively seeking a new role. On the other hand, recruitment processes have lengthened significantly - from

around 50 days to 80, and in some cases even up to 100 days. Employers are making decisions more cautiously, introducing additional candidate verification stages.

“The market has now entered a phase I describe as tactical patience, as both candidates and employers are more careful. We are seeing a decline in momentum, visible through longer recruitment processes and more prudent pay policies. In shortage roles, candidates still have the advantage - for example, positions linked to cybersecurity, whose importance has grown considerably. However, in most sectors, the market is clearly shifting towards employers. At the same time, when deciding to change jobs, it is worth considering the long-term career prospects offered by the new role,” comments Radosław Szafrński, Managing Director and Board Member at Michael Page.

MOST SOUGHT-AFTER SPECIALISTS – WHAT SALARIES CAN THEY EXPECT?

The most in-demand professionals today include finance experts,

particularly in areas such as restructuring, business optimisation, and the digitalisation of processes and sales. Accountants can expect to earn around PLN 10,000 gross per month, while independent accountants typically receive between PLN 11,000 and 14,000 gross. Heads of Accounting Departments earn between PLN 29,000 and 35,000 gross. Financial analysts most often receive between PLN 11,500 and 14,000 gross, while Finance Directors can expect around PLN 35,000 gross.

The IT sector also offers strong opportunities, particularly in cybersecurity and big data analytics. Based on employment contracts, a Security Analyst earns between PLN 18,000 and 22,000 gross, an IT Security Officer between PLN 20,000 and 25,000, and a Chief Information Security Officer (CISO) between PLN 35,000 and 50,000 gross. In big data, Data Analysts earn between PLN 12,000 and 18,000 gross, while Data Architects earn between PLN 20,000 and 30,000 gross.

Conversely, industries such as

automotive or energy-intensive manufacturing are recruiting more cautiously. An interesting trend can also be seen in the shared service centres sector, where demand is growing for higher-value business roles such as process analysts, financial controllers, and automation specialists.

“Currently, we are observing the greatest demand in finance and IT, particularly in cybersecurity, big data analytics, and process restructuring. Specialists capable of improving and optimising processes generate the most value for businesses. The key competency for the future will be adaptability - leaders who can respond quickly to change, adjust strategies flexibly, and anticipate trends. These

abilities help maintain a competitive edge in an era of constant change and the growing influence of artificial intelligence,” explains Szafrński.

NEW EXPECTATIONS FROM CANDIDATES AND EMPLOYERS

In a mature and more cautious labour market, the expectations of both employers and candidates are evolving. Companies are increasingly looking for professionals who can deliver measurable impact, operate effectively in complex environments, and remain resilient to change. Candidates, in turn, value pay transparency, sensible hybrid working models, career development opportunities, and

trust in relationships with managers. In this context, the introduction of mandatory salary range disclosure represents a significant shift, likely to influence candidate expectations. On the other hand, it will also help improve alignment and reduce the risk of disappointment. As Michael Page experts point out, companies that strike the right balance between business strategy and the human aspect of work will have the advantage. In light of the demographic decline - according to Eurostat data, around 136,000 people are leaving the labour market - this balance will be crucial in the competition for top talent.



REAL ESTATE

Commentary by Piotr Sulerzycki, Director at Michael Page

The real estate labour market remains a candidate's market. Employers continue to struggle to find experienced professionals, especially in technical and managerial areas.

Among the most sought-after competencies, soft skills are playing an increasingly important role, such as independence, creativity, problem-solving ability, and relationship-building. Digital competencies are also gaining importance, particularly in marketing and sales, where new technological tools are becoming increasingly widespread. In property design and management, the first applications of artificial intelligence are emerging, although the industry is only just beginning its technological transformation.

The sector still offers opportunities for professional growth - both for experienced specialists and those looking to start a career in real estate. It is an ideal time to develop technological skills and capitalize on the ongoing industry transformation. It is also worth noting that regional salary differences are becoming smaller. Large nationwide companies tend to maintain similar pay levels, while smaller local firms usually offer slightly lower rates.

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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 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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