

# 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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## Katowice

Prepared  
in cooperation with



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  
**1.5%**  
(12.2025, GUS)



GDP growth  
**3.6%**



PKB per capita  
**PLN 97,509**



Average salary (gross)  
**PLN 10,600.03**  
(in the business sector,  
12.2025, 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: 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

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

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

**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**

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

**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 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

- 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: 43 electric buses, 22 hybrid buses and 8 CNG buses; 197 EV charging points for electric cars.
- Katowice Resident Card – 154,752 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 888.6m
- District of New Technologies – development of the Poniatowski mining shaft area (documentation) – PLN 1.6m
- Katowice Integrated Transfer Hub System – "Św. Jana" hub – PLN 7.4m
- Katowice Integrated Transfer Hub System – "Kostuchna" hub – PLN 87.6m
- Construction of the Jerzy Kukuczka Himalayan Centre – PLN 88.9m
- Katowice "Kilar's House" Music Education Centre and permanent exhibition – PLN 20.0m
- Modernisation of infrastructure at the Muchowiec Airport – PLN 33.6m



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  
**7.2m** (2025)



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



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

# Katowice

Q1-Q4 2025



Existing stock  
● **742,000 sq m**



Supply under construction  
↓ **30,000 sq m**



Vacancy rate  
↓ **21.6%**



New supply  
● **0 sq m**



Take-up  
↑ **56,000 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**

► Total office stock in Katowice reached 742,000 sq m at the end of 2025, maintaining the city's position as the fourth-largest regional office market. Leasing demand remained stable, totalling 56,000 sq m and representing 7% of the total leasing volume across regional cities. This steady demand, combined with the absence of new supply, contributed to a decline in the vacancy rate to 21.6%.

### SUPPLY

Katowice's office market currently totals 742,000 sq m, representing 6% of Poland's total office stock. Developer activity remains limited, with no new office buildings delivered to the market in 2025, keeping supply stable.

Around 30,000 sq m of modern office space is currently under construction across three projects, resulting in moderate new supply in the near term. The largest ongoing development is the Eco City Katowice complex, an 18,000 sq m project by Górnosławski Park Przemysłowy, which is set to further strengthen the city's office offering once completed.

### TAKE-UP

Office take-up strengthened in 2025, increasing by 17% year-on-year to 56,000 sq m. Leasing activity accelerated in Q4, when nearly 23,000 sq m was leased, the strongest quarterly result in almost three years.

New leases dominated the market, accounting for over 76% of total take-up, reflecting improving tenant sentiment and efforts to secure better lease conditions. Renegotiations represented just over 20% of total volume, while expansions made up 3.5%. The IT sector was the most active tenant group, responsible for 23% of all leased space in Katowice during 2025.

### VACANCY RATE

The combination of stable demand and the absence of new supply drove a decline in the vacancy rate, which fell by 1.8 pp quarter-on-quarter and 1.6 pp year-on-year to 21.6% at the end of Q4 2025.

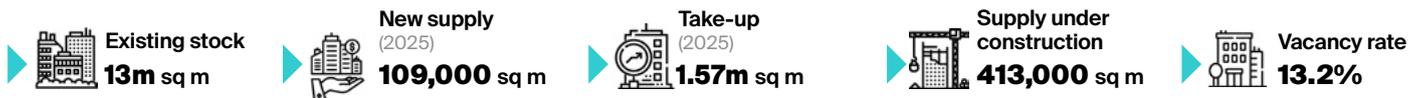
With only a limited volume of office space currently under construction, vacancy is likely to decrease further. Despite this improvement, Katowice continues to record the highest office vacancy rate among Poland's regional markets.

### RENTS

At the end of Q4 2025, asking rents for office space in Katowice remained stable, typically ranging between EUR 10.00 and 14.50/sq m/month. Service charges also remained stable, ranging from PLN 14.00 to 26.00/sq m/month.

# Office market in Poland

Q4 2025



## SZCZECIN

190,000 sq m  
 6.4%  
 EUR 10-14.5

## POZNAŃ

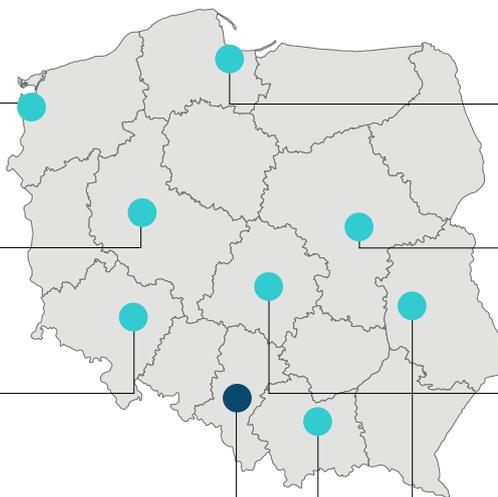
678,000 sq m  
 13.9%  
 EUR 11.5-16

## 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

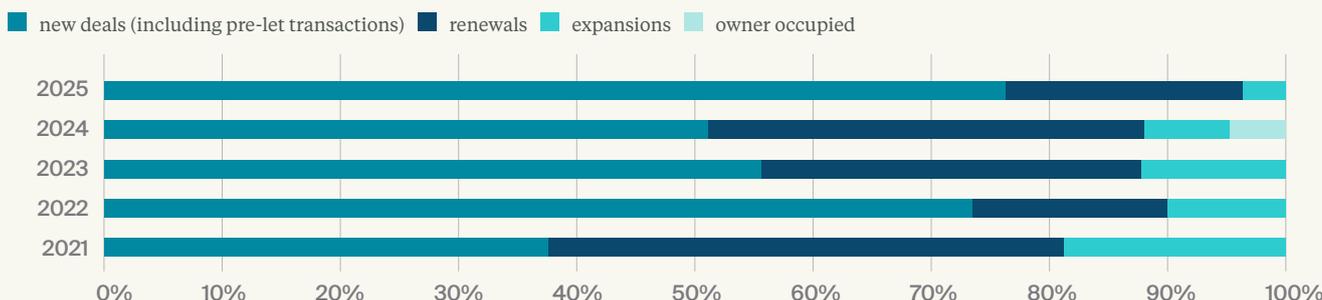
## Annual new supply, take-up and vacancy rate in Katowice



f-forecast based on schemes under construction

Source: Knight Frank

## Take-up structure in Katowice



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.

## Contacts

in Poland

+48 22 596 50 50  
[www.KnightFrank.com.pl](http://www.KnightFrank.com.pl)

**CEO**  
Charles Taylor  
[charles.taylor@pl.knightfrank.com](mailto:charles.taylor@pl.knightfrank.com)

**RESEARCH**  
Dorota Lachowska  
[dorota.lachowska@pl.knightfrank.com](mailto:dorota.lachowska@pl.knightfrank.com)

**COMMERCIAL AGENCY - KATOWICE**  
Iwona Kalaga  
[iwona.kalaga@pl.knightfrank.com](mailto:iwona.kalaga@pl.knightfrank.com)

**CAPITAL MARKETS**  
Krzysztof Cipiur  
[krzysztof.cipiur@pl.knightfrank.com](mailto:krzysztof.cipiur@pl.knightfrank.com)

**VALUATION & ADVISORY**  
Małgorzata Krzystek  
[malgorzata.krzystek@pl.knightfrank.com](mailto:malgorzata.krzystek@pl.knightfrank.com)

**STRATEGIC CONSULTING EMEA**  
Marta Sobieszczak  
[marta.sobieszczak@pl.knightfrank.com](mailto:marta.sobieszczak@pl.knightfrank.com)

**INDUSTRIAL AGENCY**  
Przemysław Piętaś  
[przemyslaw.pietak@pl.knightfrank.com](mailto:przemyslaw.pietak@pl.knightfrank.com)

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Graphic design: Karolina Chodak-Brzozowska / Art Director / PR & Marketing / Knight Frank

### PARTNER OF THE PUBLICATION:



### INVESTORS ASSISTANCE DEPARTMENT

[www.invest.katowice.eu](http://www.invest.katowice.eu)  
[linkedin.com/company/invest-in-katowice](https://www.linkedin.com/company/invest-in-katowice)

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.

## Michael Page

### CONTACT:

**Antoni Komsta**  
Principal Consultant, Engineering  
[antonikomsta@michaelpage.pl](mailto:antonikomsta@michaelpage.pl)  
+48 667 995 399

[www.michaelpage.pl](http://www.michaelpage.pl)