

Strong cities



City attractiveness, office market, HR trends

Q1 2026

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

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Tricity

Prepared
in cooperation with



Michael Page

Tricity



Agglomeration area
1,102 sq km



Agglomeration population
~760,000 (2025)



Population forecast for agglomeration
~1.58m (2030)



Migration balance
(+) 790
(Tricity)



Unemployment rate
3.1%
(03.2026, GUS)



GDP growth
9.7%



GDP per capita
PLN 89,995



Average salary (gross)
PLN 11,952.72 (Gdańsk)
(in the business sector,
03.2026, GUS)

Investment attractiveness

Rankings

1ST
PLACE

in the European Business Services Association in the category
Most Dynamically Developing City in Poland 2025

3RD
PLACE

in the ranking of Mid-Sized European Re-gions of the Future
2025 - **FDI Strategy**

3RD
PLACE

in the Mid-Sized European Regions of the Future 2025 - in the
category of **Business Friendliness**



European Entrepreneurial Region 2020



Gdańsk, Gdynia and Pomeranian Voivodeship
in **TOP 10 of fDi European Cities and Regions of the
Future 2022/2023** ranking. Pomeranian Voivodeship in the
category fDi strategy - medium-sized regions. Gdańsk was
awarded a distinction as a business-friendly medium-sized
city, and in the category of small cities, fDi strategy - Gdynia



Investment incentives

INVEST IN POMERANIA

Invest in Pomerania is a regional initiative supporting both foreign and domestic investors in establishing businesses in the Pomeranian region. It offers comprehensive support, from facilitating contact with local administration and business partners, to organizing reference visits and preparing economic reports. All services are provided free of charge, as Invest in Pomerania's main goal is the economic development of the Pomeranian voivodeship.

Economic zones

Employment grant and investment grant in the form of CIT exemptions.

Government support

Employment and investment cash grant for investors.

Live more. Pomerania

A dedicated informational campaign by the Pomeranian voivodeship, spearheaded by the Invest in Pomerania initiative. The aim is to attract potential employees, both from outside the region and internationally, actively seeking employment opportunities or contemplating a career change.

Quality of life

Rankings

1ST
PLACE

for Gdynia in the LivCom Awards 2023 for SDG for **improved landscapes and public spaces**

3RD
PLACE

for Gdańsk in **Quality of life category** in Emerging Europe Awards, 2020

2ND
PLACE

for Gdańsk in quality of life category during last 5 years according to **Report on the Quality of Life in European cities**

66TH
PLACE

in Europe – **Quality of Life Index** by Numbeo

4RD
PLACE

in the overall life satisfaction ranking (after Zurich, Copenhagen, and Groningen) in the **ThinkLodz 2023** survey

145TH
PLACE

in the world – **Quality of Life Index** by Numbeo

Quality of life in numbers

- Gdańsk systematically monitors quality of life and residents' satisfaction.
- According to Report on the Quality of life in European Cities, 2020, Gdańsk residents declare satisfaction with life in the city at - 97%.
- Bronze award - Gdynia as an example of clean living quality, The International Awards for Liveable Communities 2021.
- In Gdynia there is a position in local government structure of vice-president for quality of life, who is responsible for education, health and smart city activities.
- In 2021, Gdynia joined the ranks of five cities in the world receiving ISO 37122 certification, a distinction designed for cities that effectively create and implement a sustainable development strategy using available technologies.
- Air protection program for the City of Gdańsk.
- Development of the groundwater monitoring system in the area of Gdańsk, Sopot and the commune of Pruszcz.
- 664 thousand hectares of forests to run



Bike paths
293,7 km



Green areas
123 sq km

Facts & Figures



Number of students
86,400



Number of graduates
19,521



Number of universities
24



Airport - distance to the City centre
15 km



Airport - number of passengers
6,714,149 (2024)



BSS sector - number of centres
223



BSS sector - number of employed
40,500

Tricity

Q1 2026



Existing stock
1.07m sq m



Supply under construction
18,000 sq m



Vacancy rate
10.8%



New supply
12,700 sq m



Take-up
49,500 sq m

Coworking operators in Tricity

Spaces | Regus | Chilliflex | O4 | Collab

Standard lease terms in new buildings



Service charge
PLN/sq m/month
18.00-31.00



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



Fit-out budget
EUR/sq m
100.00-300.00

► Tricity remains one of Poland's key and most mature office markets, with total stock exceeding 1 million sqm. In recent years, however, the pace of new supply growth has slowed considerably. Nevertheless, leasing demand has remained robust, contributing to a notable decline in vacancy rates, which in Q1 2026 were among the lowest recorded nationwide.

SUPPLY

At the end of Q1 2026, total office stock in Tricity reached 1.07 million sqm, with the vast majority (approx. 75%) located in Gdańsk, primarily along Grunwaldzka Avenue and in the vicinity of the historic city centre. Gdynia accounts for approximately 21% of total stock, while Sopot represents the remaining 3%.

New supply remains very limited. In Q1 2026, only one project was delivered – Punkt, providing nearly 13,000 sqm, marking the first completion in six quarters. Currently, just 17,600 sqm is under construction across three projects.

TAKE-UP

In Q1, Tricity stood out among regional markets with particularly strong leasing activity, accounting for 41% of total take-up in regional cities. Leasing volume reached 49,500 sqm, representing an increase of 19% quarter-on-quarter and 88% year-on-year.

Demand structure shifted towards new leases, which accounted for nearly 53% of total take-up, indicating a change in occupier strategies and a growing willingness to relocate. Lease renewals, which had dominated the market over the past three years, declined to 43% share. Expansions accounted for 4.4% of total leasing volume.

Demand was well diversified, reflecting a broad tenant base. The manufacturing sector led activity (22%), followed by IT (17%). Other active sectors included logistics (9%) and retail chains (8%).

VACANCY RATE

The vacancy rate in Tricity continued its downward trend, reaching 10.8% at the end of Q1 2026, a decrease of 1.1 pp quarter-on-quarter and 1.8 pp year-on-year.

This represents the lowest vacancy level among major regional cities, surpassed only by smaller markets such as Szczecin (7.9%) and Lublin (10.5%).

Stable demand combined with limited new supply is expected to support low vacancy levels in the coming quarters.

RENTS

Asking rents in Tricity remained stable at the end of Q1 2026, typically ranging between EUR 11.00-16.00 per sqm per month. However, prime office space in newly developed buildings may exceed this range.

Service charges have stabilized, usually ranging between PLN 18.00-31.00 per sqm per month.

Office market in Poland

Q1 2026



SZCZECIN

192,000 sq m
 7.9%
 EUR 10-14.5

POZNAŃ

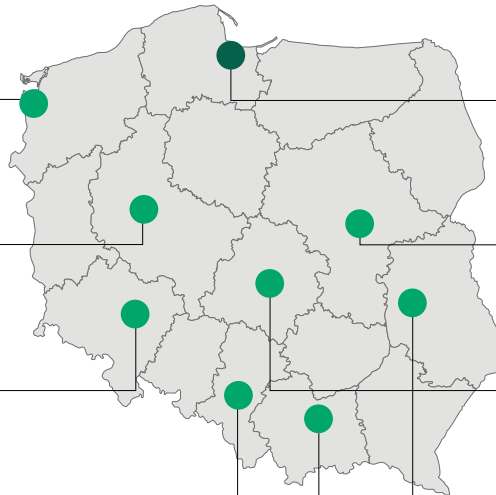
673,000 sq m
 13.8%
 EUR 11.5-16

WROCŁAW

1.36m sq m
 21.9%
 EUR 11-16

KATOWICE

742,000 sq m
 22.1%
 EUR 10-14.5



KRAKOW

1.85m sq m
 18.4%
 EUR 10-18

TRICITY

1.07m sq m
 10.8%
 EUR 11-16

WARSAW

6.28m sq m
 9.5%
 EUR 12-32

ŁÓDŹ

641,000 sq m
 19.6%
 EUR 9-15

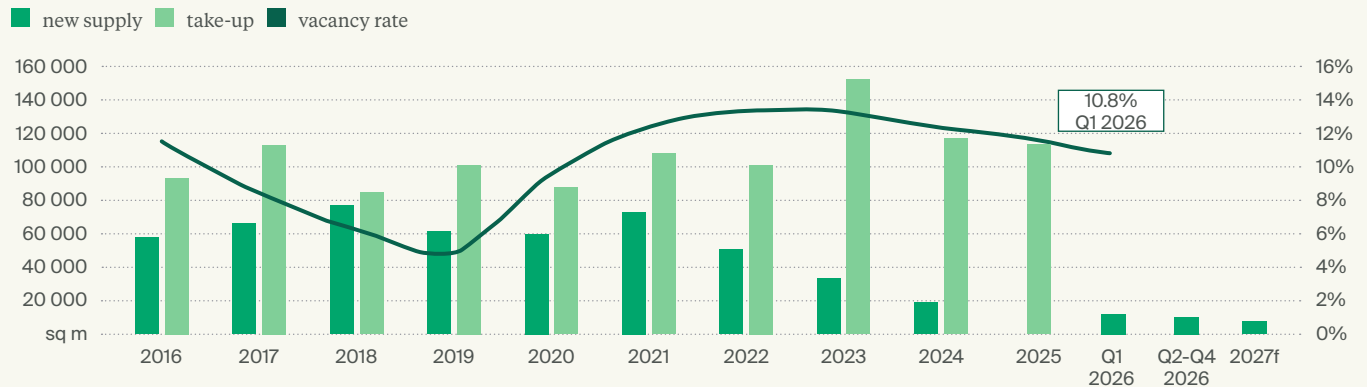
LUBLIN

225,000 sq m
 10.5%
 EUR 9-13

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

Source: Knight Frank

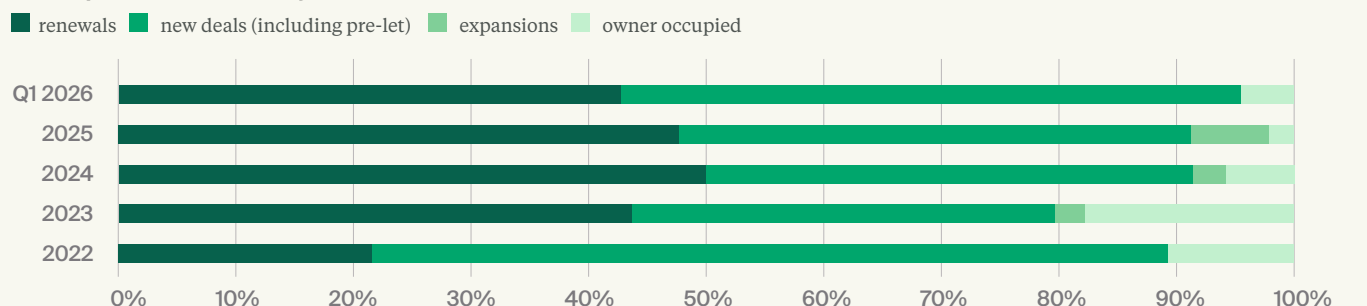
Annual new supply, take-up and vacancy rate in Tricity



f-forecast based on schemes under construction

Source: Knight Frank

Take-up structure in Tricity



Source: Knight Frank

Poland's investment revival: larger bets, stronger momentum, and a return to scale in 2026

- Poland is reasserting itself in 2026 as one of the most compelling investment destinations in Central and Eastern Europe. After several years marked by caution and subdued activity, capital is returning at scale. Both manufacturing and logistics, as well as business services and technology, are experiencing a marked acceleration. From a recruitment and advisory perspective, demand has risen sharply for labour market intelligence, particularly talent availability assessments, regional skills mapping, and workforce scalability analysis.

The most notable shift is in the size of projects. As recently as two years ago, investments typically involved 50 to 200 roles. Today, projects involving several hundred employees are increasingly common, with a growing number targeting headcounts in the thousands. This step-change is especially evident in two areas: business services centres and industrial-logistics developments.

BUSINESS SERVICES AND TECHNOLOGY: SCALE RETURNS

According to KPMG's German Central and Eastern European Business Outlook 2026, Poland remains the leading destination for German investment in the region, cited by 56 per cent of respondents, an 11 percentage point increase year on year and the highest share in Central and Eastern Europe. A further 63 per cent expect the region's strategic importance to grow over the next five years, underlining Poland's role as a core operational and technological hub.

Comparable sentiment is visible among US and Nordic investors. Three recent projects supported by Michael Page;

"Poland remains the leading destination for German investment in the region, cited by 56 per cent of respondents, an 11 percentage point increase year on year and the highest share in Central and Eastern Europe."

two in shared services and one in IT, alone account for 1,200 planned hires. This stands in stark contrast to earlier expectations, when new centres were typically projected to employ 50 to 100 people.

Shared services, global business services, and outsourcing models continue to underpin investment decisions. Poland's established urban centres: Kraków, Warsaw, Wrocław, Katowice, and Gdańsk offer deep talent pools, mature infrastructure, and operational resilience. While labour costs are no longer among the lowest in the region, investors increasingly prioritise capability over cost. Less tangible factors also matter: adaptability, initiative, and a willingness among Polish professionals to exceed baseline expectations are frequently cited in investor discussions.

Technology investment is expanding in parallel. Demand is particularly strong in cybersecurity, data analytics, automation, and artificial intelligence. Poland is increasingly hosting regional and global technology hubs responsible for high-value functions,

"While labour costs are no longer among the lowest in the region, investors increasingly prioritise capability over cost."

including digital transformation and AI deployment.

MANUFACTURING AND LOGISTICS: NEARSHORING GAINS TRACTION

Poland is also emerging as a principal beneficiary of nearshoring, as companies reconfigure supply chains in response to geopolitical risk and operational disruption. Although regional competition from Hungary, Romania, and Bulgaria remains, Poland is often the preferred choice.

The drivers are structural rather than cyclical: supply chain resilience in the wake of pandemic-era disruptions; rising geopolitical tensions; regulatory pressure linked to ESG objectives; and advances in automation that narrow cost differentials with Asia. Poland's geographic position, combined with



"Although regional competition from Hungary, Romania, and Bulgaria remains, Poland is often the preferred choice."

its infrastructure and relatively stable business environment, strengthens its appeal.

The logistics sector illustrates this shift. Demand for large-scale facilities is rising, with projects of 70,000 to 100,000 square metres now routine and larger developments increasingly under consideration. For investors, labour availability is only one factor; access to land, energy capacity, building specifications, and supply chain reliability are becoming equally decisive.

DEFENCE AND DUAL-USE TECHNOLOGIES: A STRUCTURAL SHIFT

The defence sector represents a further, and increasingly important, dimension of Poland's investment story. Growth is no longer confined to traditional military production. Dual-use technologies developed for civilian applications but adaptable for defence are gaining prominence, creating spillover effects across the wider industrial base.

Companies in sectors ranging from automation and electronics to chemicals and advanced materials are exploring entry into defence supply chains. This includes navigating certification requirements and assessing the commercial viability of expanding into strategically sensitive technologies. The trend points to a deeper, structural reorientation rather than a short-term response.

"Dual-use technologies developed for civilian applications but adaptable for defence are gaining prominence, creating spillover effects across the wider industrial base."

Recent developments underscore this shift. The move by Jastrzębska Spółka Węglowa into explosives and defence-related components highlights how even traditionally non-defence players are seeking exposure to the sector. At the same time, international capital continues to flow into Poland, while the ecosystem broadens to include technology firms, component manufacturers and energy providers.

Rising defence budgets across NATO countries, coupled with EU funding

mechanisms such as the European Defence Industry Programme, are reinforcing this momentum. Investment is increasingly directed towards modernising production, expanding automation, and building advanced capabilities in areas such as precision engineering and materials science, alongside dedicated research and development functions.

FROM CAUTION TO COMMITMENT

Taken together, these trends suggest that 2026 may mark a turning point. The caution that defined investment decisions in 2024 and 2025 is giving way to larger, longer-term commitments. Poland is no longer positioned as a secondary option, but as a primary destination for companies seeking to scale operations within Europe.

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Report
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Invest in Pomerania is a regional non-profit initiative bringing together institutions responsible for the economic development of Pomerania. Supports foreign investors in the implementation of investment projects in Pomerania, providing support at every stage of investment process and building the investment attractiveness of the region.

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