

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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Tricity

Prepared
in cooperation with



Michael Page

Tricity



Agglomeration area
5,316 sq km



Agglomeration population
~1.6m (2021)



Population forecast for agglomeration
~1.58m (2030)



Migration balance
(+) 790
(Tricity)



Unemployment rate
2.5%
(03.2025, GUS)



GDP growth
9.7%



GDP per capita
PLN 89,995



Average salary (gross)
PLN 11,152.69 (Gdańsk)
(in the business sector,
03.2025, 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

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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**
219



**BSS sector
- number of employed**
40,500

Tricity

H1 2025



Existing stock
● **1.07m** sq m



Supply under construction
↓ **28,000** sq m



Vacancy rate
↑ **12.7%**



New supply
● **0** sq m



Take-up
↑ **53,000** 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

► The Tricity is the fourth largest office market in Poland and one of only four metropolitan areas where the stock of modern office space exceeds one million square meters. Demand for office space remains stable, reaching 53,000 sq m in the first half of 2025, which accounts for 14% of the total leasing volume in regional cities. The vacancy rate in the Tricity stood at 12.7%, placing it among the regional markets with the lowest level of unleased space. This result is a consequence of limited new supply in recent quarters, combined with sustained, stable demand.

SUPPLY

The Tricity boasts a total office stock of 1.05m sq m, with the majority (75%) situated in Gdańsk, primarily along Grunwaldzka Avenue and surrounding the historical city centre. Gdynia hosts approximately 22% of the Tricity's office space, while Sopot accommodates the remaining 3%.

Development activity in the Tricity remains low. In the first half of 2025, no new office buildings were delivered, and over 28,000 sq m of office space is currently under construction, with around 3,000 sq m scheduled for completion later in 2025. The largest project underway is Palio Office Park C, offering 13,000 sq m of space, developed by Cavatina Holding.

TAKE-UP

In the first half of 2025, the volume of leased office space in the Tricity remained stable, exceeding 53,000 sq m. This represents a 5% increase compared to the same period last year. Gdańsk dominates the Tricity office market, recording nearly 51,000 sq m of total leasing volume by the end of June. The highest demand came from the logistics sector, which accounted for 32% of the total leased space.

Lease renewals dominated the market, accounting for 55% of all transactions, highlighting the importance of cost considerations such as relocation and Office adaptation. A significant portion of the leased space also came from new lease agreements, which represented 41% of the total volume. Expansions remained limited, representing only 0.4% of total transactions, while the remaining share of the volume was leased for owner-occupied purposes.

VACANCY RATE

The vacancy rate in Q2 2025 remained stable and stood at 12.7%, representing a marginal increase of 0.1 pp q-o-q and a 0.8 pp y-o-y. This was the third lowest vacancy rate among regional cities, behind Szczecin and Lublin.

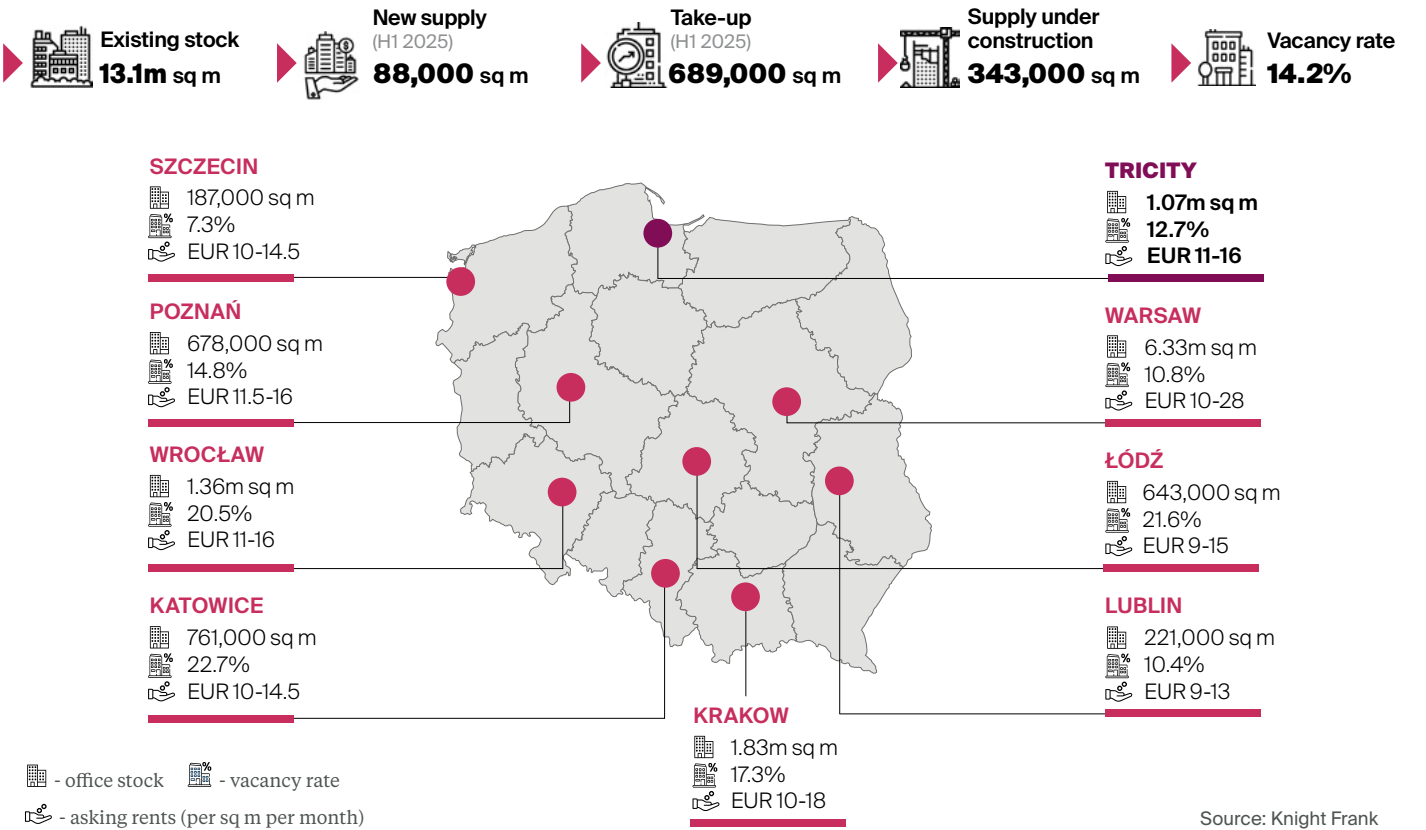
Gdańsk recorded the lowest vacancy rate at 9.2%, while Gdynia and Sopot had significantly higher levels, at 23.6% and 18.4%, respectively. Stable demand and limited new supply are expected to drive further reductions in vacancy rates in the coming quarters.

RENTS

At the end of Q2 2025, rents in the Tricity remained stable, ranging from EUR 11.00 to 16.00/sq m/month. In newly developed buildings, rents can reach even higher levels. Service charges remained stable, typically ranging between PLN 18.00 and 31.00/sq m/month.

Office market in Poland

H1 2025



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 area¹. 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 women². 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

¹ 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 workforce³. 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.

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

³ 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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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:

- ▶ strategic consulting, independent forecasts and analysis adapted to clients' specific requirements,
- ▶ 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, Kraków, 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.

Report
library:



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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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