

# Strong cities



City attractiveness, office market, HR trends

Q3 2024

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**  
**2.3%**  
(08.2024, GUS)
- ▶  **GDP growth**  
**9.7%**
- ▶  **GDP per capita**  
**PLN 89,995**
- ▶  **Average salary (gross)**  
**PLN 9,643.51** (Gdańsk)  
(in the business sector, 09.2023, GUS)

## Investment attractiveness

Rankings

**1<sup>ST</sup> PLACE** Outsourcing Stars 2021, 2022 in the City category for **the fastest growing city in the BSS sector in Poland**, Pro Progressio

**1<sup>ST</sup> PLACE** in 2022 for Tricity as **the most dynamically developing city in Poland**, CEE Shared Services and Outsourcing Awards

**1<sup>ST</sup> PLACE** in 2020 and 2022 for Tricity as **the best place to do business** in Poland by ABSL

**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

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

for Gdańsk in **People Friendly Cities 2020** ranking by Forbes

**3<sup>RD</sup>**  
**PLACE**

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

**2<sup>ND</sup>**  
**PLACE**

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

**55<sup>TH</sup>**  
**PLACE**

in Europe – **Quality of Life Index** by Numbeo (mid-2022)

**142<sup>ND</sup>**  
**PLACE**

in the world – **Quality of Life Index** by Numbeo (mid-2022)

## 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.



**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**  
**5,907,280** (2023)
- ▶ **BSS sector - number of centres**  
**209**
- ▶ **BSS sector - number of employed**  
**40,500**

# Tricity




Q3 2024

- ▶  Existing stock  
**1.07m** sq m
- ▶  Supply under construction  
**30,000** sq m
- ▶  Vacancy rate  
**12.7%**
- ▶  New supply  
**19,000** sq m
- ▶  Take-up  
**93,000** sq m

## Coworking operators in Tricity

Spaces | Regus | Chilliflex | O4 | Collab | City Space

## Standard lease terms in new buildings

- ▶  Service charge  
PLN/sq m/month  
**17.00-30.00**
- ▶  Rent-free period  
**1-1.5** month  
for each contract year
- ▶  Fit-out budget  
EUR/sq m  
**100.00-300.00**

▶ Tricity is the fourth-largest office market in Poland and one of only four metropolitan areas where modern office space exceeds 1m sq m. The Tricity metropolitan area remains an attractive location for office tenants, who have leased nearly 93,000 sq m of space since the beginning of the year, accounting for 18% of all office space rented in regional cities. As in other locations, new supply is declining, with only 19,500 sq m delivered in Q1-Q3 2024. The vacancy rate has increased to 12.7%, which, while higher than before, still falls below the national average of 14.1% and the average of 17.3% for regional cities.

### SUPPLY

The office stock in Tricity continues to grow, although at a significantly slower pace. Only 19,500 sq m was delivered in Q1-Q3, with an additional 5,000 sq m expected by year-end. Thus, the total new supply for 2024 will amount to 24,000 sq m, marking the lowest level in over a decade. The amount of office space currently under construction is also decreasing, with a record-low 30,000 sq m in development.

### TAKE-UP

Office leasing take-up in Tricity during Q1-Q3 2024 has decreased compared to the record-breaking year of 2023, yet it remains among the highest levels recorded for this period in the market. Approximately 93,000 sq m of office space was leased since the start of the year, reflecting a 27% decline from the same period in 2023, but a 22% increase compared to Q1-Q3 2022.

Lease renegotiations dominated the market in Q1-Q3 2024, representing nearly 54% of the leased volume. This highlights tenants' sensitivity to operational costs, including relocation expenses and the need to adapt spaces. The share of new lease agreements remained stable compared to the previous year at over 36%, although this is still below levels seen in earlier years. Few tenants opted for expansions, which accounted for just 2.2% of leased space (down from 2.8% in 2023 and 10.8% in 2022), with the remaining 7% of the volume consisting of owner-occupier agreements.

The most active sectors in Tricity's leasing market are IT and banking/finance, which together account for 44% of the leased space. Additionally, the metropolitan area is a favoured location for shared services centres, which leased 17% of the total space.

### VACANCY RATE

After a decline in Q2, the vacancy rate in Tricity rose slightly again, reaching 12.7% by the end of September. This marks an increase of 0.2 pp compared to Q2 and a decrease of 0.7 pp compared to Q1 2024.

The rise in the vacancy rate is attributed to both the addition of new office space to the market and weaker demand.

### RENTS

As of the end of Q3 2024, asking rents in Tricity remained stable, typically ranging from EUR 11.00 to 15.50/sq m/month. However, rents for prime space in newly constructed buildings may exceed this range. Service charges have also stabilised, generally ranging from PLN 17.00 to 30.00/sq m/month.

# Office market in Poland

Q3 2024



## SZCZECIN

187,000 sq m  
 6.8%  
 EUR 10-14.5

## POZNAŃ

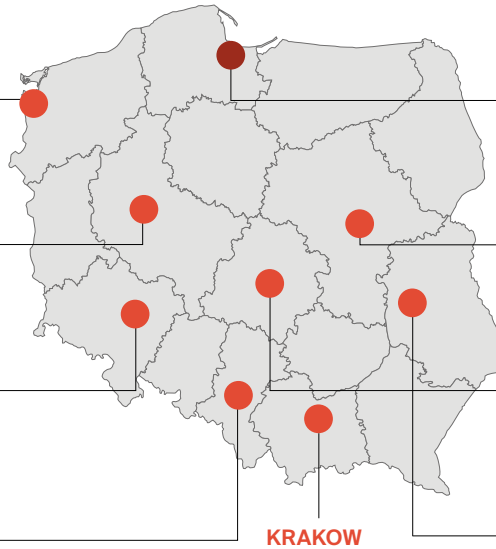
674,000 sq m  
 12.5%  
 EUR 11-15.5

## WROCŁAW

1.37m sq m  
 19.7%  
 EUR 10-16

## KATOWICE

752,000 sq m  
 20.5%  
 EUR 9-14.5



## TRICITY

1.07m sq m  
 12.7%  
 EUR 11-15.5

## WARSAW

6.26m sq m  
 10.7%  
 EUR 10-28

## ŁÓDŹ

645,000 sq m  
 21.1%  
 EUR 9-15

## LUBLIN

221,000 sq m  
 12.6%  
 EUR 9-13

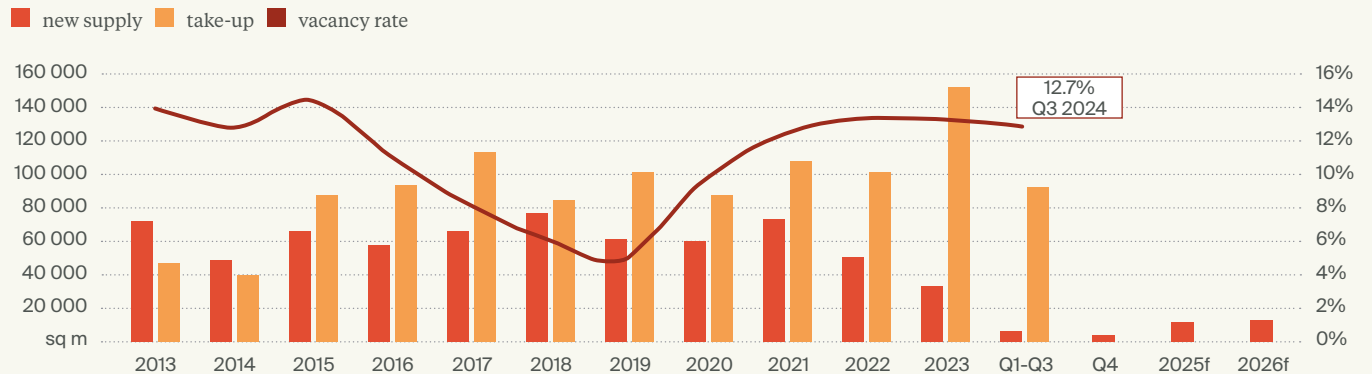
## KRAKOW

1.82m sq m  
 18.9%  
 EUR 10-16

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

Source: Knight Frank

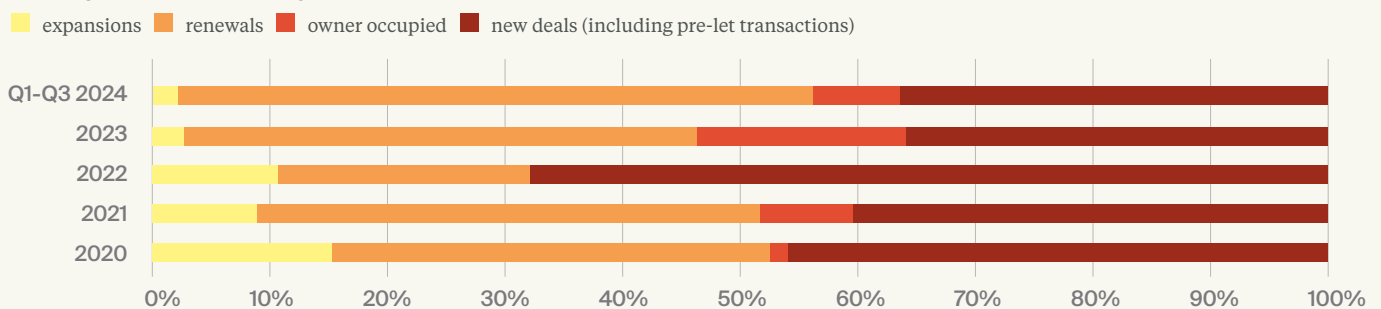
## Annual new supply, take-up and vacancy rate in Tricity



f-forecast based on schemes under construction

Source: Knight Frank

## Take-up structure in Tricity



Source: Knight Frank

# Salary Guide 2025: Navigating the Changing Job Market

In 2025, the Polish job market will continue to undergo significant transformations. Global challenges such as social and political shifts, advancing digitalisation, demographic changes, increased competition for talent, and candidates' expectations are shaping pay and recruitment strategies across various sectors. In this context, "Salary Guide 2025" by Michael Page experts provides entrepreneurs, HR managers, and recruitment specialists with an in-depth analysis of trends and forecasts for the coming year.

## Key Salary Trends for 2025

The year 2025 will bring several major changes impacting wages in Poland. The Michael Page salary report identifies the fastest-growing sectors and those facing wage-related challenges.

### 1. Growth in the IT and Technology Sector

The IT sector is experiencing changing recruitment trends. There is a shift away from hiring less experienced specialists and an increased focus on expert-level professionals, particularly in cybersecurity, AI, machine learning, and software development. These areas are seeing a rise in salary levels.

### 2. Candidates Expect More

Employees are increasingly looking for not only attractive salaries but also flexible working conditions, development opportunities, and values that align with their beliefs. Companies that fail to meet these expectations may struggle to attract and retain talent.

### 3. Rising Importance of Sustainability

In 2025 and the years that follow, the need for ESG managers in Poland will grow, driven by the CSRD (Corporate Sustainability Reporting Directive). By 2026, around 3,500 organisations will be required to report on ESG. As the ESG sector is relatively new in Poland, there is a limited pool of specialists available.

### 4. Increased Demand for Soft Skills and Multidisciplinarity

Expectations for candidates in finance and accounting sectors reflect current employer demands for experts across fields. Employers now require not only knowledge and experience but also agility in updating skills, the ability to identify and communicate business opportunities and risks, strong organisational understanding, data analysis and presentation skills, valuable business recommendations, and support for implementing them.



► Take the opportunity to adapt your pay strategy and recruitment processes to the challenges you face. Ensure your company's success in a competitive job market.

Don't let job market changes catch you off guard. Utilise the expert insights from Michael Page's "Salary Guide 2025" – a leading authority in recruitment and HR consulting. Download the free report on our website and gain a competitive edge with the latest data and thorough trend analysis. Download "[Salary Guide](#)".

# The ins and outs of the labour market in the IT sector

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## Changing trends with an emphasis on cybersecurity and AI

The IT sector is struggling with volatile recruitment patterns. It seems to be turning down specialists with little experience. That said, there is a clear growth of interest in employees at the expert level – especially in such areas as cybersecurity, AI, machine learning, and software development. Businesses are intensively looking for experts who can integrate AI into existing systems, and those who can secure their IT infrastructure against growing cyber threats.

## Salary growth in key specialisations

Salaries in the IT sector remain stable; yet in AI, machine learning and cybersecurity, it is possible to see an increase in wages. Businesses are willing to pay more for skilled professionals in these fields.

## Nearshoring centres and service migration

The creation of nearshoring centres and the relocation of IT services from Western Europe to Poland is becoming more and more a fact of life. Businesses looking for savings due to rising energy costs and falling margins in production decide to move their IT services to Poland. As a result, the number of recruitment processes in the IT sector in Poland will be going up. This is expected to happen in the fourth quarter of 2024.

## Low-level job outflow

Along with the influx of new jobs, many entry-level jobs are migrating to countries such as India and the Philippines. Middle and senior specialists – especially in such areas as IT management, software engineering, and consulting – continue to find employment in Poland, which is due to the high quality of work of Polish consultants and the lack of appropriate competences on foreign markets.

## Back to on-premises solutions

The cloud is no longer the only solution for IT companies. Due to high costs and the risk of vendor lock-in, companies are returning to on-premises solutions. FinOps managers will gain significance, and their job description will include effective management of cloud service costs.

## The role of soft skills

Companies are increasingly valuing soft skills in candidates. Communication skills, teamwork and empathy are becoming as important as technical skills.

## The importance of ethics at work

The younger generation of staff seem to be prioritising the values and ethics of the companies they work for. Candidates are increasingly choosing employers who act in accordance with their values, avoiding businesses from the industries that come across as unethical.

## Cooperating with graduates of technical studies

The number of graduates of technical faculties of Polish universities remains at a high level, which ensures a constant inflow of new talent into the labour market.

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# TOP 3

Most desirable positions in the IT sector:

- 1 ▶ SAP Consultant:**  
PLN 25,000 – 29,000  
gross monthly
- 2 ▶ Security Engineer:**  
PLN 18,000 – 25,000  
gross monthly
- 3 ▶ Cloud Engineer:**  
PLN 25,000 – 31,000  
gross monthly



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- ▶ tailored presentations and market reports for clients.

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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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