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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Tricity

Prepared in cooperation with Invest in Pomerania, MichaelPage

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

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 ru.n

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

Q3 2025

Existing stock
● **1.07m** sq m

Supply
under construction
26,000 sq m

Vacancy rate
11.9%

New supply
● **0** sq m

Take-up
72,000 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

Tricity ranks among Poland's four largest office markets, alongside Warsaw, Krakow, and Wrocław, with total office stock now exceeding one million square metres. A combination of stable occupier demand and the absence of new supply has contributed to a steady decline in the vacancy rate, which has now reached its lowest level in four years. Notably, Tricity currently boasts the lowest vacancy rate among Poland's major regional office markets.

SUPPLY

The total office stock in the Tricity amounts to 1.07m sq m, with the vast majority (75%) located in Gdańsk, primarily along Grunwaldzka Avenue and in the historic city center. Gdynia accounts for approximately 22% of the total office stock, while the remaining 3% is located in Sopot.

Development activity in the Tricity remains limited. As of the end of September 2025, no new buildings had been delivered to the market, while over 26,000 sq m of office space was under construction, nearly 3,000 sq m of which is scheduled for completion by the end of 2025. The largest project currently under construction is Punkt, developed by Torus, offering nearly 13,000 sq m of office space.

TAKE-UP

Office space take-up for office Tricity remains stable, reaching nearly 72,000 sq m as of the end of September 2025. Gdańsk attracted the highest level of tenant activity, accounting for 63,000 sq m of leased space, while the logistics sector generated the strongest demand, responsible for 35% of total take-up.

Renegotiations continued to dominate leasing activity in the Tricity, representing 48% of total volume in the first three quarters of 2025. This highlights tenants' focus on managing costs related to relocation and fit-out. New leases also played a significant role, making up 45% of total take-up. Expansions remained limited, accounting for just 3%, while the remaining share came from owner-occupied transactions.

VACANCY RATE

In Q3 2025, the vacancy rate in the Tricity stood at 11.9%, the lowest level in four years. This represents a decline of 0.8 pp compared to the previous quarter and the same period last year. The lowest vacancy rate was recorded in Gdańsk at 8.7%, while in Gdynia and Sopot it reached 22.3% and 17.2%, respectively.

RENTS

At the end of Q3 2025, headline rents in the Tricity remained stable, typically ranging between 11.00 and 16.00 EUR/sq m/month. For top-quality space in newly developed buildings, rents may exceed this range. Service charges stabilized as well, generally ranging from 18.00 to 31.00 PLN/sq m/month.

Office market in Poland

Q3 2025

Existing stock
13m sq m

New supply (Q1-Q3 2025)
107,000 sq m

Take-up (Q1-Q3 2025)
1m sq m

Supply under construction
340,000 sq m

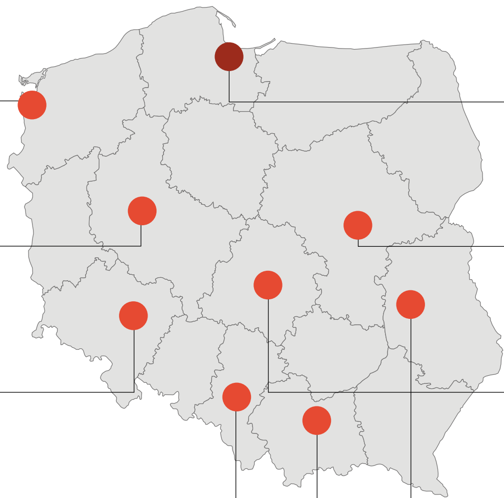
Vacancy rate
13.9%

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

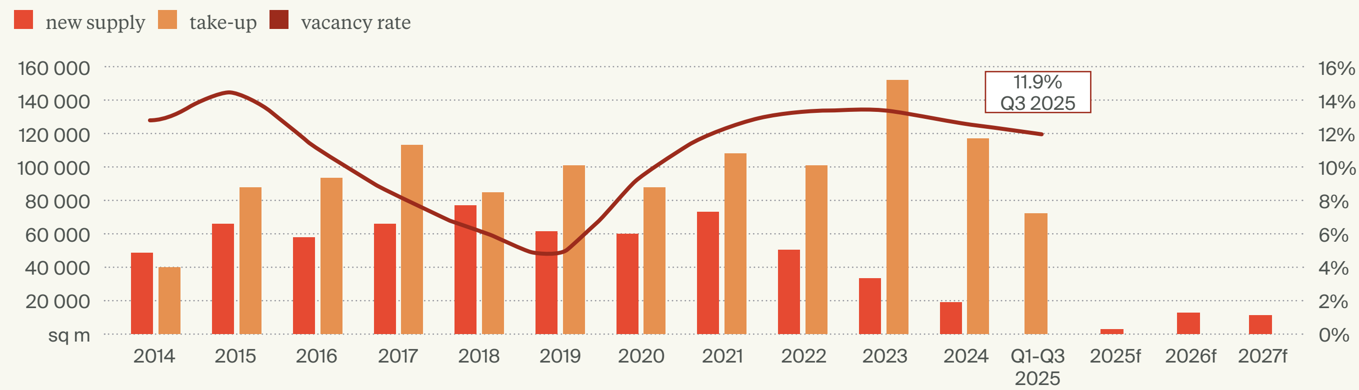
LUBLIN
225,000 sq m
10.3%
EUR 9-13

KRAKOW
1.85m sq m
18.6%
EUR 10-18

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

Source: Knight Frank

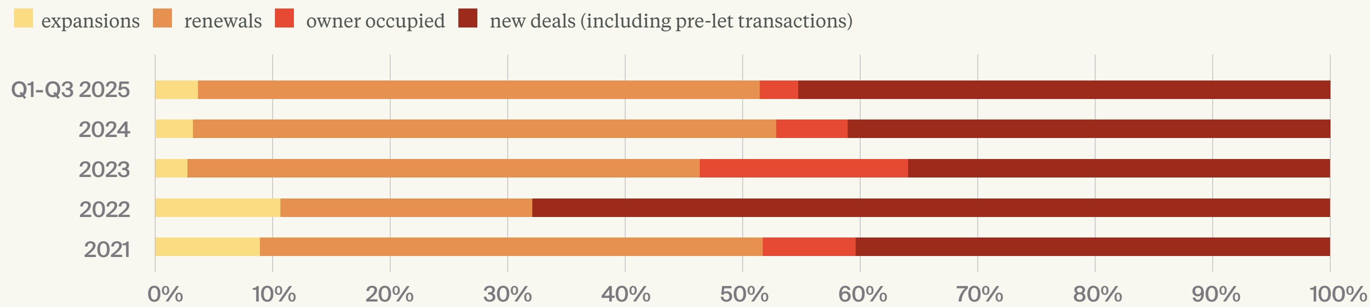
Annual new supply, take-up and vacancy rate in Tricity



f-forecast based on schemes under construction

Source: Knight Frank

Take-up structure in Tricity



Source: Knight Frank

Michael Page

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 Szafrański, 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 Szafrański.

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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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.

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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 ofinvestment process and building the investment attractiveness of the region.

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