

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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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
2.7%
(12.2025, GUS)



GDP growth
9.7%



GDP per capita
PLN 89,995



Average salary (gross)
PLN 11,200.61 (Gdańsk)
(in the business sector,
12.2025, 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
223



BSS sector - number of employed
40,500

Tricity

Q1-Q4 2025



Existing stock
● **1.07m** sq m



Supply under construction
↓ **24,000** sq m



Vacancy rate
● **11.9%**



New supply
● **0** sq m



Take-up
↑ **114,000** 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 remains one of the key and most mature office markets in Poland, with total stock exceeding one million sq m. In recent years however, development activity has clearly slowed, reflecting the nationwide trend of constrained new supply. With demand remaining stable, this has translated significant reduction in the vacancy rate, which at the end of 2025 remained one of the lowest in the country.

SUPPLY

Total office stock in Tricity reached 1.07m sq m at the end of 2025, the vast majority of which (75%) is located in Gdańsk, primarily along Grunwaldzka Avenue and in the historic city centre. Gdynia accounts for approximately 22% of total office stock, while the remaining 3% is located in Sopot.

New supply in Tricity has been declining for four consecutive years, and no office buildings were completed in 2025. Limited development activity is in line with the nationwide trend, with new supply delivered to the market in 2025 reaching historically low levels.

A modest revival is expected in the coming years, with nearly 24,000 sq m currently under construction across two projects.

TAKE-UP

The amount of office space leased in the Tricity in 2025 remained at a comparable level to the previous year, totalling nearly 114,000 sq m (decrease 2% year-on-year). Gdańsk attracted the strongest tenant interest, with more than 98,000 sq m leased. The logistics sector generated the highest demand, accounting for 26% of total take-up.

Renegotiations represented the largest share of leasing activity (47%), highlighting the importance of cost considerations such as relocation and office adaptation. However, new leases also accounted for a significant portion of activity, representing 44% of total take-up. Expansions made up 7% of the total volume, while the remaining 2% comprised owner-occupier transactions.

VACANCY RATE

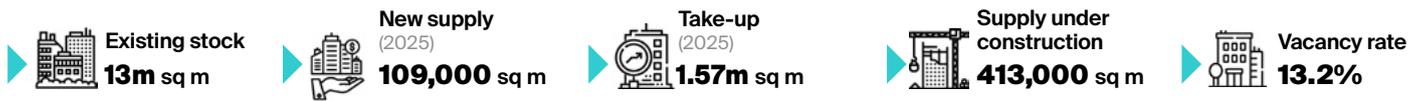
At the end of Q4 2025, the vacancy rate in Tricity stood at 11.9%, remaining at the same level as in the previous quarter and recording a decrease of 0.6 pp compared to the same period last year. This was the third-lowest vacancy rate among regional cities, surpassed only by Szczecin and Lublin. The lowest vacancy rates were recorded in Sopot and Gdańsk, at 8.5% and 8.6% respectively, while in Gdynia the rate reached 23.7%. Stable demand and limited new supply are expected to further support a gradual decline in the vacancy rate in the coming quarters.

RENTS

At the end of 2025, headline asking rents in Tricity remained stable, typically ranging from EUR 11.00 to 16.00/sq m/month. In the case of prime space in newly developed buildings, rents may exceed this range. Service charges also remained stable, typically ranging between PLN 18.00 and 31.00/sq m/month.

Office market in Poland

Q4 2025



SZCZECIN

190,000 sq m
 6.4%
 EUR 10-14.5

POZNAŃ

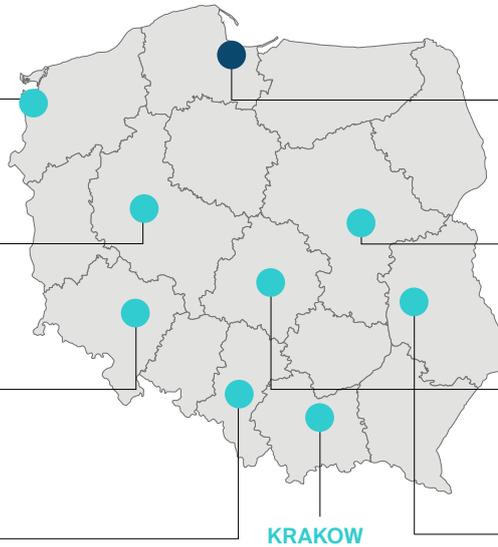
678,000 sq m
 13.9%
 EUR 11.5-16

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

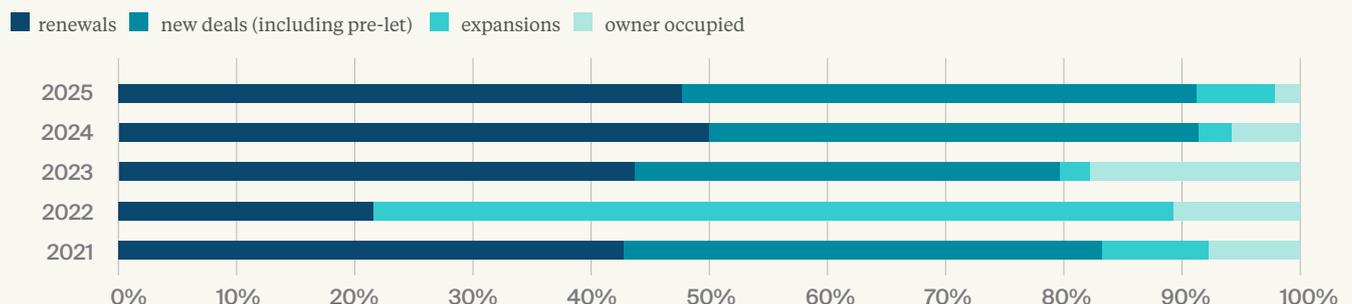
Annual new supply, take-up and vacancy rate in Tricity



f-forecast based on schemes under construction

Source: Knight Frank

Take-up structure in Tricity



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.

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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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