

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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Katowice

Prepared
in cooperation with



Michael Page

Katowice



City area
164.7 sq km



Population
277,900
(Katowice, GUS 06.2025)
2,113,023
(GZM, InfoGZM 2024)



Population forecast
261,050
(2030)



Unemployment rate
1.7%
(02.2026, GUS)



GDP growth
3.6%



GDP per capita
PLN 97,509



Average salary (gross)
PLN 11,773.84
(in the business sector,
02.2026, GUS)

Investment attractiveness

Rankings

9TH
PLACE

in the **"Top 10 Large European Cities of the Future 2025 - fDi Strategy"** City's strategy for attracting foreign direct investment (fDi Intelligence)

2ND
PLACE

in the ranking of **Business-Friendly Cities** of "Forbes" - cities and municipalities of 150,000 - 299,000 inhabitants

3RD
PLACE

in the **"Polish Cities of the Future 2050"** ranking - in the sub-ranking of office, residential and "after hours" and **1st place in the school category**

TITLE: **"European City of Science" 2024**

awarded by EuroScience Association

CERTIFICATE:

"Standards of Investor Service in Local Government"

Investment incentives

The Investors Assistance Department is a special unit in the Katowice City Hall. It provides various services ranging from supporting investors who create business service centres, developers of the residential space, hotels and offices, to creating an ecosystem for start-ups and a friendly environment for the SME sector.

Providing investors with support based on their individual expectations and requirements: preparing market analyses, information on investment locations, offering image-building assistance, organising investors' visits, coordinating cooperation with universities, etc.

Katowice Special Economic Zone - the best in Europe and one of the best in the world (fDi Intelligence), offering income tax exemptions.

Structured educational projects to support the development of talent in the city from secondary school to higher education: FujitsuTech, Kyndryl Future Achievers, Technologiczny Kompas Kariery (Sopra Steria), CivicPUNK, Corporate Readiness Certificate (CRC).

A chance to invest inside a centre that has been implementing sustainable development policies based on Agenda 2030, UN.



Quality of life

Rankings

1ST
PLACE

in Business Insider's ranking
- Best city to live in Poland

2ND
PLACE

in the "Europolis" ranking of the Schuman Foundation for **the most ecological Polish cities**

1ST
PLACE

for the Culture Zone in the "Top Municipal Investment of the Decade" poll of Portal Samorządowy

2ND
PLACE

among cities with over 100,000 residents in the **"Perły Samorządu 2025"** (Pearls of Local Government 2025) ranking

6TH
PLACE

in Poland among cities with more than 100,000 residents in terms of **quality of life** assessment in the "Newsweek" ranking

Silver Award at the LivCom Awards 2024 in the category Technology and Solution Project, as part of the LivCom Awards for Sustainable Development Goals – The International Awards for Liveable Communities

Quality of life in numbers

- Implementation of the 17 UN Sustainable Development Goals and the goals of the City Development Strategy.
- Katowice 2030 – fair transformation, climate change and equity.
- Green urban transport: 43 electric buses, 22 hybrid buses and 8 CNG buses; 197 EV charging points for electric cars.
- Katowice Resident Card – 157,000 registered cards.
- Participatory Budgeting – over PLN 20m, including the Green Budget – PLN 3m.

Selected investment projects in progress:

- Selected investment projects under implementation:
- Strategic project – District of New Technologies – Katowice Gaming and Technology HUB – PLN 909.6m
- District of New Technologies – development of the Poniatowski mining shaft area (documentation) – PLN 1.6m
- Tram to the South + Mobile Metropolis – Katowice Integrated Transfer Hub System – PLN 212.3m
- Construction of the Jerzy Kukuczka Himalayan Centre – PLN 95.9m
- Katowice "Kilar's House" Music Education Centre with a permanent exhibition – PLN 21.9m
- Modernisation of infrastructure at the Muchowiec Airport – PLN 33.6m
- Construction of two municipal swimming pools in Katowice – PLN 79.0m



Length of cycling infrastructure
208.9 km



Green areas
40%
of the city's area

Facts & Figures



Number of students
50,321 (Katowice)
92,817 (GZM)



Number of graduates
12,162 (Katowice)
23,377 (GZM)



Number of universities
12 (Katowice)
19 (GZM)



Airport - distance to the city centre
30 km



Airport - number of passengers
1.13m (Q1 2026)



BSS sector - number of centres
156 (Katowice and GZM)



BSS sector - number of employed
36,800 (Katowice and GZM)

Katowice

Q1 2026



Existing stock
742,000 sq m



Supply under construction
30,000 sq m



Vacancy rate
22.1%



New supply
0 sq m



Take-up
10,300 sq m

Coworking operators in Katowice

City Space | Regus
Własne B. | Cluster Offices

Standard lease terms in new buildings



Service charge
PLN/sq m/month
14.00-26.00



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



Fit-out budget
EUR/sq m
350.00-500.00

► Katowice ranks as Poland's fifth-largest office market, with a total stock of above 742,000 sqm, accounting for around 6% of the country's total office supply. Development activity has remained very limited following the exceptionally strong wave of new deliveries in 2022, when 127,000 sqm was completed - equivalent to roughly 20% of the current stock.

SUPPLY

No new office buildings have been delivered in Katowice for five consecutive quarters. Currently, approximately 30,000 sqm is under construction, with nearly 27,000 sqm scheduled for completion later this year.

The largest scheme underway is the Eco City Katowice complex, comprising approximately 18,000 sqm and developed by the Upper Silesian Industrial Park.

TAKE-UP

Leasing activity in Katowice weakened in Q1 2026 following a strong performance in the last quarter of the previous year. Total take-up amounted to 10,300 sqm, representing a decrease of 54% quarter-on-quarter and 44% year-on-year.

New leases dominated the leasing structure, accounting for 70% of total take-up, while renegotiations represented 18%. The share of expansions increased to 12%, providing a positive signal for market activity in the coming quarters.

Sector-wise, the public sector recorded the largest share of demand at 29%, driven largely by a single transaction involving the Labour Office, which leased space in Centrum Biurowe Sokolska 29. The industrial sector followed with a 20% share, while the IT sector accounted for 10% of total leasing volume.

VACANCY RATE

As a result of weaker demand in Q1 2026, the vacancy rate increased slightly to 22.1%, up by 0.5 pp quarter-on-quarter.

The delivery of new office supply in the coming quarters may place additional upward pressure on vacancy levels.

RENTS

As of the end of Q1 2026, headline rents for office space in Katowice remained stable, typically ranging between EUR 10.00 and EUR 14.50 per sqm per month.

Service charges also remained stable, generally ranging from PLN 14.00 to PLN 26.00 per sqm per month.

Office market in Poland

Q1 2026



SZCZECIN

192,000 sq m
 7.9%
 EUR 10-14.5

POZNAŃ

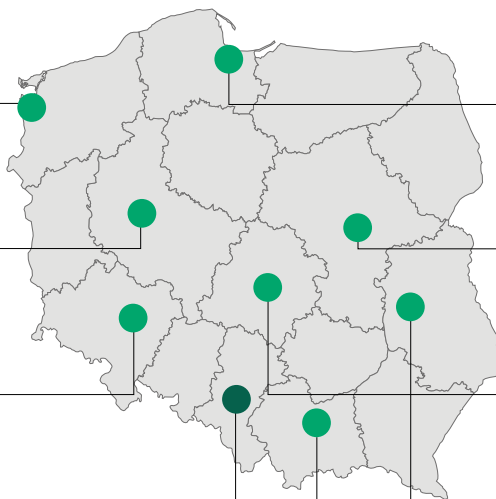
673,000 sq m
 13.8%
 EUR 11.5-16

WROCŁAW

1.36m sq m
 21.9%
 EUR 11-16

KATOWICE

742,000 sq m
 22.1%
 EUR 10-14.5



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

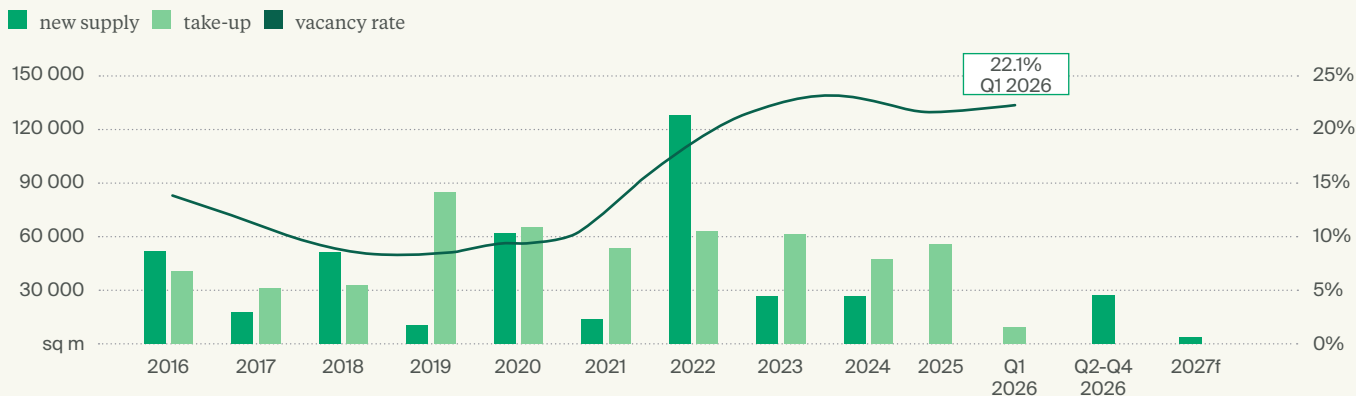
KRAKOW

1.85m sq m
 18.4%
 EUR 10-18

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

Source: Knight Frank

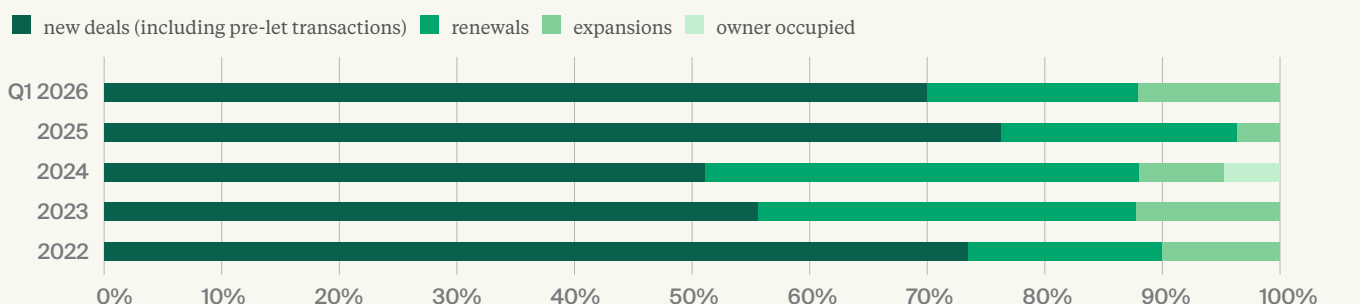
Annual new supply, take-up and vacancy rate in Katowice



f-forecast based on schemes under construction

Source: Knight Frank

Take-up structure in Katowice



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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www.invest.katowice.eu
[linkedin.com/company/invest-in-katowice](https://www.linkedin.com/company/invest-in-katowice)

Investors Assistance Department is a dedicated unit of the Katowice City Hall, which provides comprehensive services: from supporting business services investors, residential and commercial developers, to creating a friendly environment for start-up and the SMEs sector. Investors Assistance Department focuses on providing solutions customized to the needs of investment projects. Thanks to a wide range of innovative products an experienced team of experts supports investors in achieving their business goals in Katowice and in gaining and maintaining a competitive advantage.

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