

# 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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## Poznań

Prepared  
in cooperation with

**POZnań\***

Michael Page

# Poznań



City area  
**261.9 sq km**



Population  
**716,800**  
(01.2025, Mobile data)

**536,151** (12.2024, GUS)



Number of companies  
**135,737**  
(05.2025, GUS)



Unemployment rate  
**1.2%**  
(05.2025, GUS)



GDP growth  
**11%**



GDP per capita  
**PLN 155,265**  
(GUS)



Average salary (gross)  
**PLN 10,100.82**  
(in the business sector,  
05.2025, GUS)

## Investment attractiveness

Rankings

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

**PLACE**

in the **Most dynamically developing city in Poland**  
category – CEE Business Services Summit&Awards 2024

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

**PLACE**

in the ABSL ranking - **cooperation with a local investor service office**

**1<sup>ND</sup>**

**PLACE**

in the ABSL ranking - **attractive location in the city centre**

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

**PLACE**

in the **Business Friendly City category** – European Cities and Regions of the Future fDi Report

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

**PLACE**

in the **Human Capital and Lifestyle** category – European Cities and Regions of the Future fDi Report

## Investment incentives

Project Manager – a person dedicated to the project, responsible for the preparation and launch of the investment, cooperation with the investor after the start of the project.

Employer branding – organization of press conferences, distribution of materials to local media, through social media and on the website [www.poznan.pl](http://www.poznan.pl).

Promotion of the City's real estate at national and international real estate events – MIPIM, Poznań Housing Fair.

Supporting real estate investors in talks with offices, departments of the Office, city companies involved in the processes of preparing and implementing investments.

Regularly updated database of the City's investment areas at [www.poznan.pl](http://www.poznan.pl).

Publication and updating of the City's investment offers in the database of the Polish Investment

Cooperation with Special Economic Zones in the context of obtaining government grants.

Preparation of sector analyses for the needs of investors.

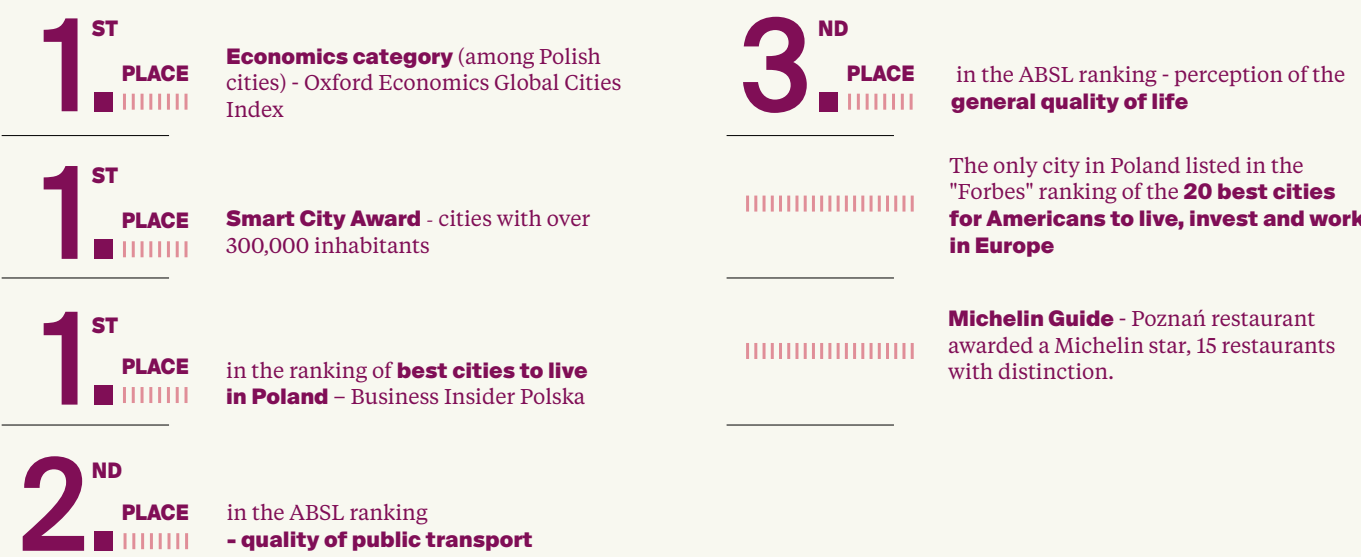
Preparation and promotion of urban real estate offer, including:

- 9 residential and commercial properties,
- 1 area composed of fields defined as areas of production facilities, warehouses and storages, with permissible service development, as well as non-public car parks,
- 2 areas for service development or placement of retail facilities with a sales area of more than 2000 m<sup>2</sup> or production facilities, warehouses and depots,
- 1 property for service activities,
- 1 project for cubic car parks (3 separate locations),
- 1 property for the function of green and water areas and sports and recreation in the green wedge.



# Quality of life

Rankings



## Quality of life in numbers

### Improving the quality of life of residents through:

- Creating attractive jobs. Companies in the modern services sector such as ROCKWOOL Global Services Center, SOFTSWISS, Miele – among others - are expanding and increasing employment opportunities in the process.
- Pozitive Technologies conference - attracting top employers, creating a strong and active IT community.
- Smart City - implementation of new technologies, along with the development of creative entrepreneurship and the startup sector, with an emphasis on education at every level and active support for universities.
- The Smart City Poznań application won the Wings of IT in Administration award, in the Tools for communication with citizens category.
- Ecology - increasing green areas, creating an improved energy mix using renewable energy sources, modernising the public transport fleet (electric vehicles, hybrid vehicles). A number of programmes are being carried out: "Let's end smog in Poznań", "Keep warm", asbestos removal programme.
- Mobility - green transport solutions – car-sharing, scooter-sharing.
- Centre project - among other things, revitalisation of the city centre, reduction of car traffic in the city centre.
- Rich cultural life - numerous festivals, e.g. the world-famous Malta Festival Poznań, some 40 art galleries, 30 museums, 13 cinemas, the philharmonic.
- Culinary capital of Poland - around 500 restaurants and bars, offering food from all corners of the world.
- OK Poznań – a benefits program for residents.
- A rich array of leisure and recreation opportunities - aqua park, ice rinks, artificial ski slope, climbing walls, bowling alleys, lakes, swimming pools, city beaches with numerous attractions for inhabitants and tourists along the Warta River, 10 sports stadiums, over 500 playgrounds, zoo, palm house - the largest in Poland and one of the largest in Europe.
- Poznan International Fair - the leading trade fair organiser in Poland and Central and Eastern Europe.



**Bike paths**  
**351 km**



**Green areas**  
**128.3 sq km**

## Facts & Figures



**Number of students**  
**100,000**



**Number of graduates**  
**24,500**



**Number of universities**  
**24**



**Airport - distance to the city centre**  
**7 km**



**Airport - number of passengers**  
**3,407,127 (2024)**



**BSS sector - number of centres**  
**162**



**BSS sector - number of employed**  
**30,500**

RATING  
AGENCY

**Fitch Ratings**

RATING

**A-**

# Poznań

H1 2025



Existing stock  
● **678,000** sq m



Supply under construction  
● **52,000** sq m



Vacancy rate  
↓ **14.8%**



New supply  
● **2,000** sq m



Take-up  
↑ **32,000** sq m

## Coworking operators in Poznań

Business Link | Regus

## Standard lease terms in new buildings



Service charge  
PLN/sq m/month  
**17.00-29.00**



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



Fit-out budget  
EUR/sq m  
**250.00-500.00**

► As of the end of June 2025, the total office stock in Poznań amounted to 678,000 sq m, positioning the market as the sixth largest in Poland in terms of office space. Stable demand, which reached 32,000 sq m in the first half of the year, combined with limited new supply, contributed to a decrease in the vacancy rate to 14.8%. Asking rents remain stable, typically reaching up to EUR 16.00/sq m/month.

### SUPPLY

In the first half of 2025, the office stock in Poznań reached 678,000 sq m, accounting for over 5% of the total supply in Poland. Developer activity in Poznań has significantly waned, as only 2,000 sq m of modern office space was delivered to the market since the beginning of the year, following the completion of a single project - Dymka 188. So far, it remains the only office building delivered in Poland's regional cities this year.

In Poznań, nearly 52,000 sq m of office space is currently under construction, marking the second highest volume among all regional cities in Poland. The largest ongoing project is AND2, a 40,000 sq m development by Von der Heyden Group. Scheduled for completion in the first half of 2026, it will become the largest office building in the city in terms of total floor area.

### TAKE-UP

In the first half of 2025, over 32,000 sq m of office space was leased in Poznań, representing a 4% increase compared to the same period in 2024. Additionally, Poznań accounted for 8% of the total leasing volume in Poland's regional office markets during the first half of 2025.

As in previous quarters, new lease agreements accounted for the largest share of leasing agreements, representing 48% of the total volume in the first half of 2025. However, renegotiations remained significant, reaching 47% by the end of June, indicating that many tenants still prefer to stay in their existing locations to avoid relocation costs. The remaining volume was attributed to expansions.

### VACANCY RATE

The vacancy rate in Q2 2025 stood at 14.8%, representing a decrease of 0.2 pp compared to the previous quarter, and an increase of 0.9 pp year-on-year.

### RENTS

At the end of the first half of 2025, asking rents in Poznań remained stable, typically ranging from EUR 11.50 to 16.00/sq m/month, with rents in new buildings located in prime areas potentially exceeding this range. Service charges have also remained stable compared to the previous quarter, typically ranging from PLN 17.00 to 29.00/sq m/month.

# Office market in Poland

H1 2025



## SZCZECIN

187,000 sq m  
7.3%  
EUR 10-14.5

## POZNAŃ

678,000 sq m  
14.8%  
EUR 11.5-16

## WROCŁAW

1.36m sq m  
20.5%  
EUR 11-16

## KATOWICE

761,000 sq m  
22.7%  
EUR 10-14.5

## TRICITY

1.07m sq m  
12.7%  
EUR 11-16

## WARSAW

6.33m sq m  
10.8%  
EUR 10-28

## ŁÓDŹ

643,000 sq m  
21.6%  
EUR 9-15

## LUBLIN

221,000 sq m  
10.4%  
EUR 9-13

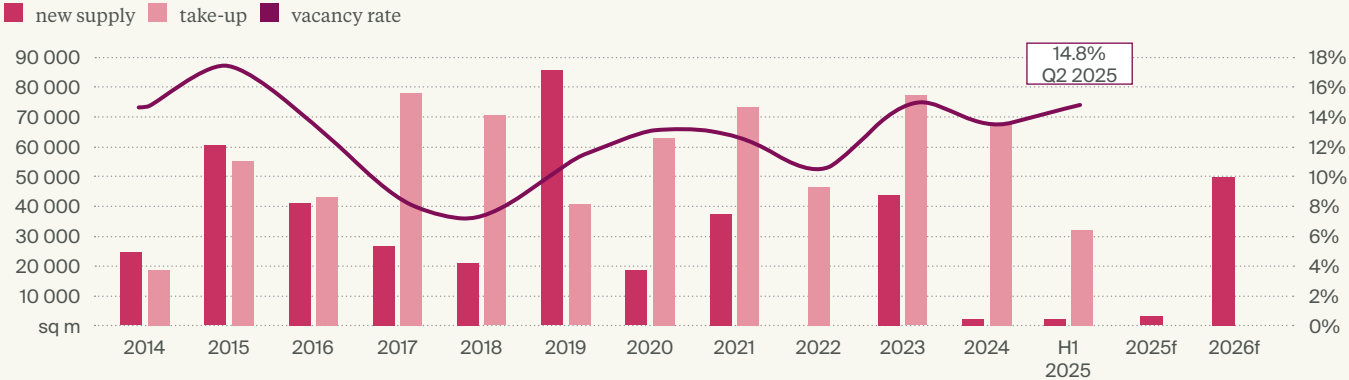
## KRAKOW

1.83m sq m  
17.3%  
EUR 10-18

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

Source: Knight Frank

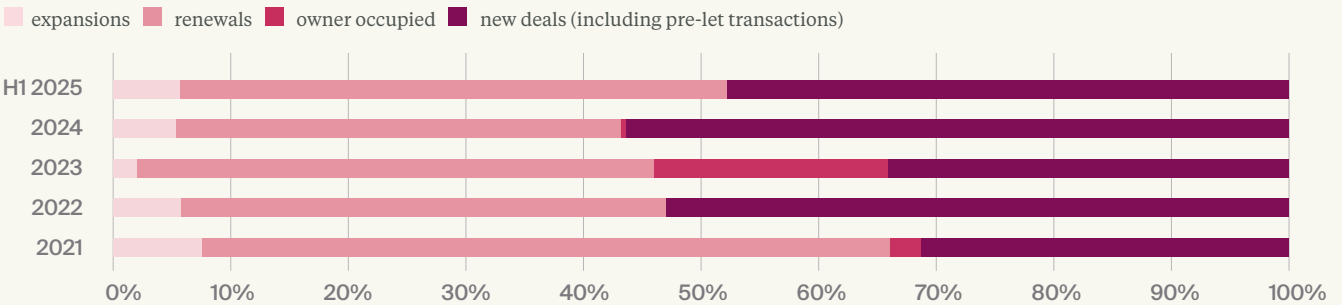
## Annual new supply, take-up and vacancy rate in Poznań



f-forecast based on schemes under construction

Source: Knight Frank

## Take-up structure in Poznań



Source: Knight Frank



# 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 area<sup>1</sup>. 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 women<sup>2</sup>. 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

<sup>1</sup> 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 workforce<sup>3</sup>. 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.

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

<sup>3</sup> 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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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  
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Poznań is one of the most attractive cities for investors in the Central and Eastern European region, repeatedly awarded in prestigious business rankings. The city is developing in a sustainable manner, in line with the smart city idea. In Poznań we create good conditions for investment, but also for living for all residents. We focus on openness and diversity, we care for green areas, a rich cultural and modern public transport. Investors, among others, from the modern services sector and the IT industry choose Poznań due to the availability of qualified workforce - global giants, including: Franklin Templeton, GSK, Miele, Capgemini or Bridgestone SSC are completing in Poznań the most advanced processes.

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