



Colliers  
INTERNATIONAL

POLAND

# GLIWICE OFFICE MARKET

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Q1 | 2020

## REGION

- Katowice is the largest city in the Silesian voivodeship and one of the most important economic centres in Poland. Together with 40 other towns and cities in the region it constitutes the Górnośląsko-Zagłębiowska Metropolis, which covers a total area of 2,500 km<sup>2</sup>. The metropolitan area was formally established in July 2017 and it started operating in January 2018. It is inhabited by over 2.2 million people, which is almost half of the population of the Silesian voivodeship. The metropolitan area includes the Katowice Special Economic Zone, which operates within the Polish Investment Zone established in June 2018.
- The Silesian voivodeship offers very good transport links, being crossed by the trans-European corridor III (Berlin – Wrocław – Katowice – Kraków – Lwów) and corridor IV (Gdańsk – Katowice – Żylin) routes. The region also boasts a very well-developed road network. In Gliwice, two motorways intersect (A1 and A4). In 2016, the Intercity Road (DTŚ) connecting Katowice and Gliwice was completed. The southern and western bypass is currently under construction.
- Both cities can also boast convenient rail connections. The railway junction in Katowice is one of the largest and most important in the country. In addition, Katowice-Pyrzowice international airport operates in the north of the metropolitan area, while in Gliwice the sports airport is being expanded to serve business flights and small cargo traffic. Work is planned to be completed in 2020.
- Both Katowice and Gliwice are business-friendly cities with high growth potential, as confirmed by prestigious rankings including fDi's Polish Cities of the Future 2019/2020, which explores the development of urban centers around the world.
- In both cities, a number of investments have improved the quality of life of residents. In the centre of Katowice, Culture Zone has been created, a new, unique cultural and entertainment area that includes the famous Spodek venue, the International Conference Centre, the new Silesian Museum and the headquarter of the National Polish Radio Symphony Orchestra, which draws audiences from all over the country.
- Projects completed in recent years in Gliwice include the creation of one of the largest sports and entertainment halls (Arena Gliwice), the implementation of an intelligent traffic management system, the expansion of the Nowe Gliwice Education and Business Center and the modernisation of the Municipal Palm House. Currently, work is under way on a priority investment for the city – the construction of the modern Transfer Center, which is due to begin in Q2/Q3 2020. There are also plans to expand Technopark Gliwice Science and Technology Park with a further building and construction of a city hospital.
- In the Katowice and Gliwice area there are currently thirteen universities, which provide a large and diverse pool of skilled human resources. The strong academic centre attracts new investors both in technical sciences and business services.



**GLIWICE**

**179,800**

**KATOWICE**

**294,500**

Population



**2.4%**

**1.1%**

Unemployment rate



**PLN 5,451**

**PLN 5,699**

Average monthly salary



**2**

**11**

Number of universities



**18,900**

**55,660**

Number of students

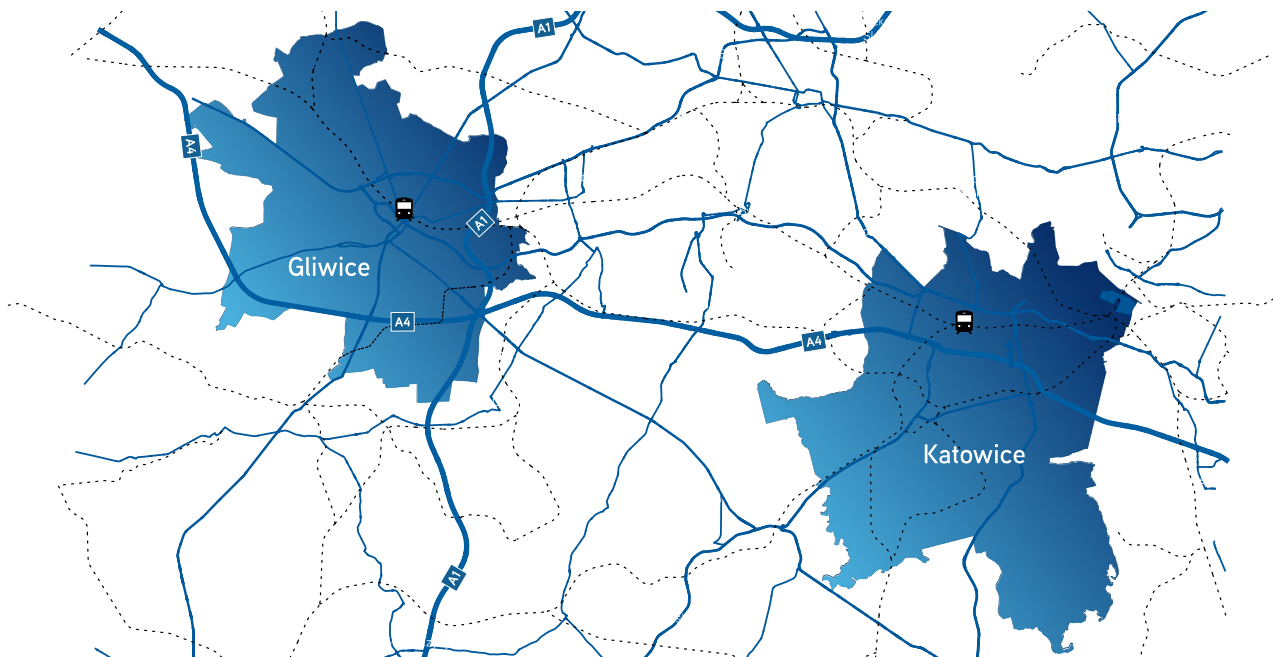


**5,890**

**14,790**

Number of graduates

Source: Statistics Poland, the latest available data

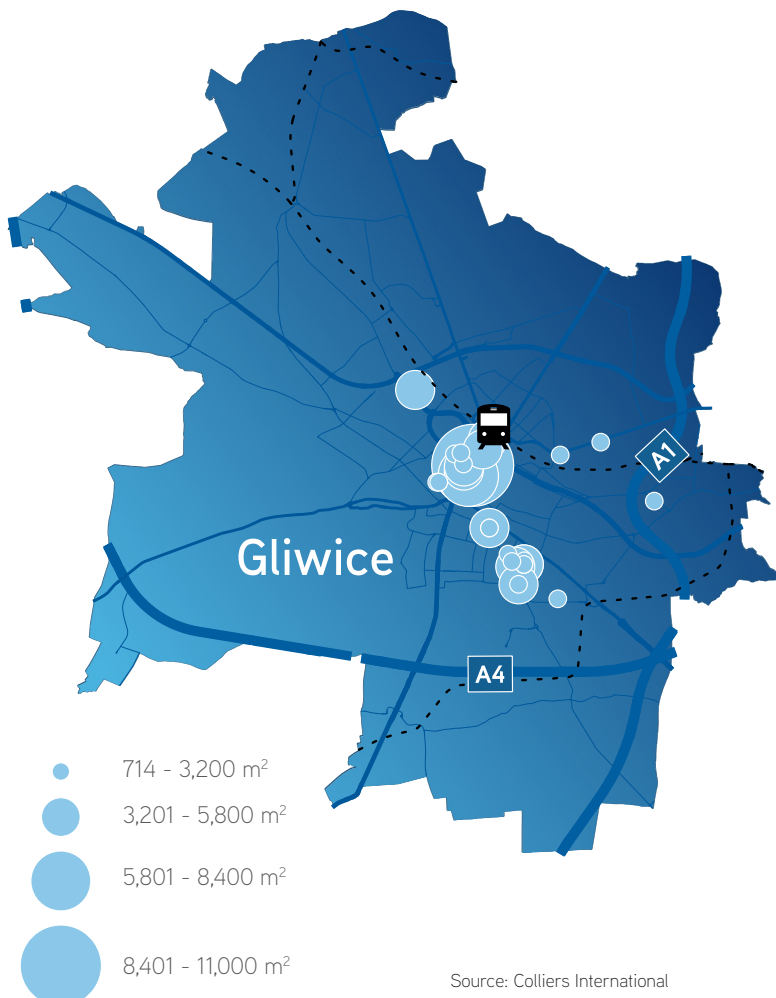


Source: Colliers International

## OFFICE MARKET IN GLIWICE

- Gliwice is currently second after Katowice in terms of the number of office projects in the Górnośląsko-Zagłębiowska Metropolis. In recent years, we have observed the rapid development of the Gliwice market, which has resulted in growing interest in the city, especially among investors and companies from the IT and new technology sectors.
- At present, Gliwice offers over 93,000 m<sup>2</sup> of existing office space. Supply is generated mainly by local developers and a large proportion of available resources are owner-occupied projects.
- Office buildings are mainly located in the central part of the city, in the Nowe Gliwice area and in the Special Economic Zone, relatively close to the Intercity Road (DTŚ), which provides excellent transport accessibility.
- The largest projects include the office building at Prymasa Stefana Wyszyńskiego 11 (11,000 m<sup>2</sup>), Dworcowa 25 (6,200 m<sup>2</sup>) and the building at Bohaterów Getta Warszawskiego 9 (5,600 m<sup>2</sup>). Also worth noting is the revitalised Old Post Office building, which is now DL Center Point. Thanks to its unique form, it clearly stands out against the surrounding urban fabric and it has become an architectural symbol of Gliwice. The investment was nominated for the MIPIM Awards in the Best Revitalization category.

### EXISTING OFFICE SPACE IN GLIWICE



Source: Colliers International

- Also noteworthy is Nowe Gliwice – a complex of buildings within the former Gliwice Coal Mine. The project is located in the Trynek district and will develop part of the former Gliwice Coal Mine into the Education and Business Center. A business activity zone and business incubator have been established on 16 hectares revitalised by the Upper Silesian Agency for Entrepreneurship and Development. As part of the complex, office space, investment areas and space for organising training, conferences and trade fairs are available. The former mine's restored buildings are adjacent to the modern headquarters of IT companies and advanced technology enterprises from industries such as electrical engineering, energy, telecommunications and aviation.
- In Q1 2020 in Gliwice, one office building was completed – Bojkowska 47B (3,300 m<sup>2</sup>). A further building, Future Five, of the Future Processing complex is in the active construction stage. Both projects are located in Nowe Gliwice.



*In Upper Silesia, in addition to Katowice, Gliwice is another example of a dynamically developing urban centre, which by its potential attracts foreign and local investors. New and planned office projects do not differ from office buildings operating in the largest cities in Poland, and the solutions used in them fully meet the growing needs of tenants.*

*Barbara Pyszcz | Regional Director | Katowice*



- At the planning stage, with expected delivery by the end of 2022, there are approximately 45,800 m<sup>2</sup> of office space. Investments that have been announced as planned for the coming years include DL Center Point Gliwice at Piwna/Jagiellońska (16,000 m<sup>2</sup>), Alpha Office at Tarnogórska 1 (14,000 m<sup>2</sup>), the modernisation of the historic building of the Steelworks Directorate at Hlobka/Piwna (about 7,500 m<sup>2</sup>), Traugutta Business Hub (4,500 m<sup>2</sup>), and the building at Okulickiego/Sowińskiego (approx. 3,000 m<sup>2</sup>).
- Demand for office space in Gliwice is generated mainly by companies from the business services sector, IT companies as well as industries related to new technologies. Demand is also created by numerous start-ups established by graduates of the Silesian University of Technology.
- Transactions signed in 2019 in Gliwice include lease agreements in the building at Dworcowa 25 signed by ista Shared Service (approx. 2,100 m<sup>2</sup>) and PKO BP (approx. 420 m<sup>2</sup>), the Valmet contract in the Bojkowska 47 building (approx. 2,000 m<sup>2</sup>), the agreement by the private school TEB Edukacja, which leased the entire building at Chorzowska 12 (over 1,500 m<sup>2</sup>) and the contract of SII in the building at Zygmunt Starego 24 (approx. 156 m<sup>2</sup>). All these transactions were new agreements. In Q1 2020, mentioned earlier ista Shared Service signed a pre-lease contract in the planned DL Center Point Gliwice building.
- The vacancy rate in Gliwice for class A and B buildings at the end of Q1 2020 stood at 8.8%, which translates into 8,200 m<sup>2</sup> of available office space. Average rents in existing A-class buildings are in the range 11-13.8 EUR/m<sup>2</sup>/month, while in B-class buildings they oscillate around 7-11 EUR/m<sup>2</sup>/month.
- The potential of Gliwice is being increasingly perceived by developers, which has translated into a systematic increase in office investments in the city. In the coming years, we forecast further market development and growing interest from tenants.



Visualisation of DL Center Point Gliwice at Piwna, source: DL Invest Group

## SELECTED OCCUPIERS IN GLIWICE

TENANT	BUILDING
Asseco Poland	Office building at Chorzowska 50
DTiQ, ENGINIETY, Luxmed, ista Shared Services	Dworcowa 25
Flytronic	Owner-occupied office building at Bojkowska 43
Future Processing	Owner-occupied office building at Bojkowska 37A
ING Bank Śląski	Office building at Zwycięstwa 52
The Farm 51	Office building at Bohaterów Getta Warszawskiego 15
The Software House	DL Center Point Gliwice
Vattenfall IT Services Poland	Arcus
ista Shared Services	Biprohut
Valmet	Office building at Bojkowska 47B
TRW	Portowa 8 Business Center
SAP	IKAR

CHART:  
OFFICE SPACE (M<sup>2</sup>)

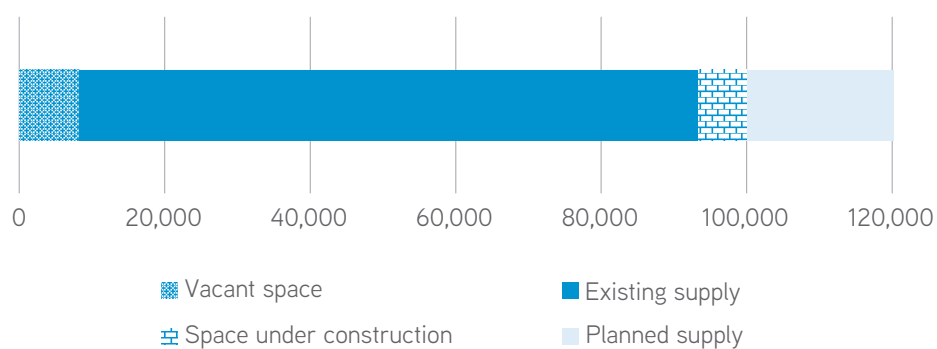
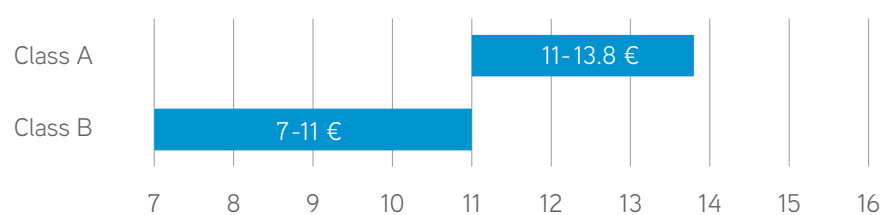


CHART:  
RENTAL RATES  
EUR/M<sup>2</sup>/MONTH



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