



# GAINING FLEXIBILITY

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Poland's flexible office market continues to grow at a rapid pace, reflecting the evolving requirements of both companies and employees. Being a modern alternative to traditional offices, flexible office space is becoming increasingly attractive due to flexible lease terms, innovative fit-outs and dynamic work environments. Poland's seven key office markets—Warsaw, Kraków, Wrocław, Tricity, Katowice, Poznań, and Łódź—contain nearly 420,000 square meters of flexible office space, accounting for approximately 3 percent of their total office stock.

Warsaw invariably leads the way in Poland for flexible office space, but such offices are also emerging in other major cities, including Kraków, Wrocław and Tricity. Smaller towns like Bydgoszcz and Opole have also recently attracted flex office providers operating in Poland.

### NEW GROWTH PHASE

Initially, the growth of Poland's flexible office market was fuelled by the growing number of freelancers, start-ups and younger generations of workers who valued flexibility and creative environments. Today, large corporations are increasingly opt-

ing for temporary flex offices before committing to long-term leases.

2018 was a record year for the activity of flexible office providers in Poland, with over 110,000 square meters of office space leased, nearly 94 percent of which was transacted in Warsaw. In subsequent years, the average annual take-up by flex office providers, developers and investment funds stabilized at approximately 50,000 square meters. In 2019, the flexible office sector began to rapidly gain momentum also in regional cities, which accounted for over 23,000 square meters leased for flexible offices of the total take-up of more than 58,000 square meters recorded in 2024.

Most flexible workplace concepts, whether operated by independent providers or under private labels of developers and investment funds, achieve occupancy levels ranging from 70 percent to 90 percent, depending on their location. The most sought-after locations, particularly those near transport hubs in city centers, often report occupancy rates exceeding 100 percent.

### MAIN PLAYERS

Alongside independent flexible office providers present in

Poland—both international operators such as Regus/Spaces, WeWork or Mindspace, and Polish providers including Loftmill, The Shire and Chillispaces.com—office developers and landlords have also recognized that tenants increasingly expect greater flexibility and the ability to quickly adapt to evolving business requirements.

Having flexible office space available within a building or its immediate neighborhood makes it significantly easier to adapt workplaces to current requirements. Additionally, by using co-working offices within an office building, potential tenants can familiarize themselves with the building and its surroundings without committing to long-term leases. This allows developers and landlords to diversify their operations, put vacant office space to meaningful use, and, if necessary, lease it on standard terms.

Developers and landlords offering flexible offices include the following: Echo Investment (CitySpace), Adgar Poland (Brain Embassy, Be Yourself and Flexi Wave), Skanska

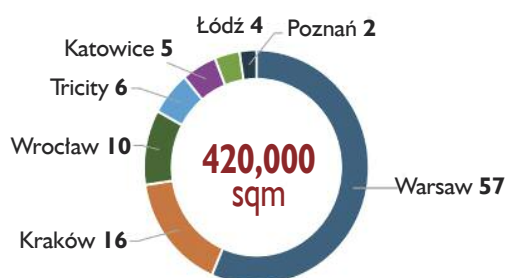
Poland (Business Link), Immofinanz (myoffice and mycowork), Cavatina (Quickwork), Vastint (Ready Flex), Buma with its At Office, and Globalworth's Ace of Space concept announced in late 2024.

The flexible office market is also facing a number of challenges, including adapting to growing tenant expectations regarding sustainability. With companies increasingly seeking offices that meet ESG (Environmental, Social, Governance) standards, flex office providers must invest in energy-efficient technologies and eco-friendly solutions. Another challenge is the intensifying market competition, prompting providers to further expand their offerings and enhance service quality.

### HUGE POTENTIAL

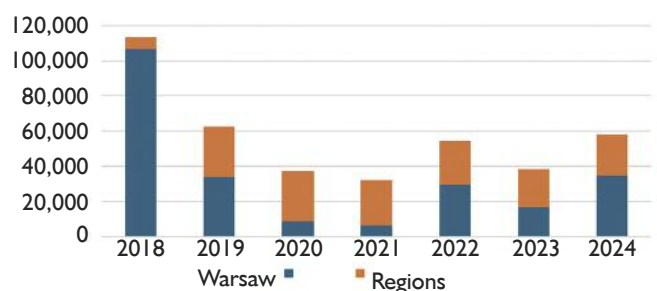
In summary, the Polish flexible office market is in growth mode and holds significant potential amid evolving work patterns and rising corporate awareness of flexibility and sustainability. Its future, however, hinges on its ability to quickly adapt and innovate to address both current and future challenges.

**Flexible Office Stock by City**  
(in % of the total 420,000 sqm)



Source: Newmark Polska

**Flexible Office Take-up**  
(by location, in sqm)



Source: Newmark Polska