

# SEOUL OFFICE LEASING

January 2022 Monthly Market Review

## 조사개요

지역	서울 전 지역 및 판교, 분당 지역
대상	연면적 1,000m <sup>2</sup> (330py) 이상, 지상 4층 이상의 업무시설 및 업무 복합시설
조사 방법	전화조사 및 자산관리업체의 발표자료, 공시자료 등 참고
조사 내용	오피스 임대 및 공실 변화, 임차인 이동현황, 거래 사례 등
조사 기간	2021년 12월 1개월 간 조사
DB 관리	OKEY 리서치센터는 업무용 빌딩의 공실정보 및 임대료를 조사하고 있으며, 사무실 임대플랫폼 OKEY Office Key를 통하여 관리 활용되고 있습니다.

## 권역별 분류

**CBD**  
Central Business District

**GBD**  
Gangnam Business District

**YBD**  
Yeouido Business District

**ETC**  
Non Major Business District

**PBBD**  
PTV-Bundang Business District

**도심권**  
종로구, 중구 일대

**강남권**  
강남구, 서초구 일대

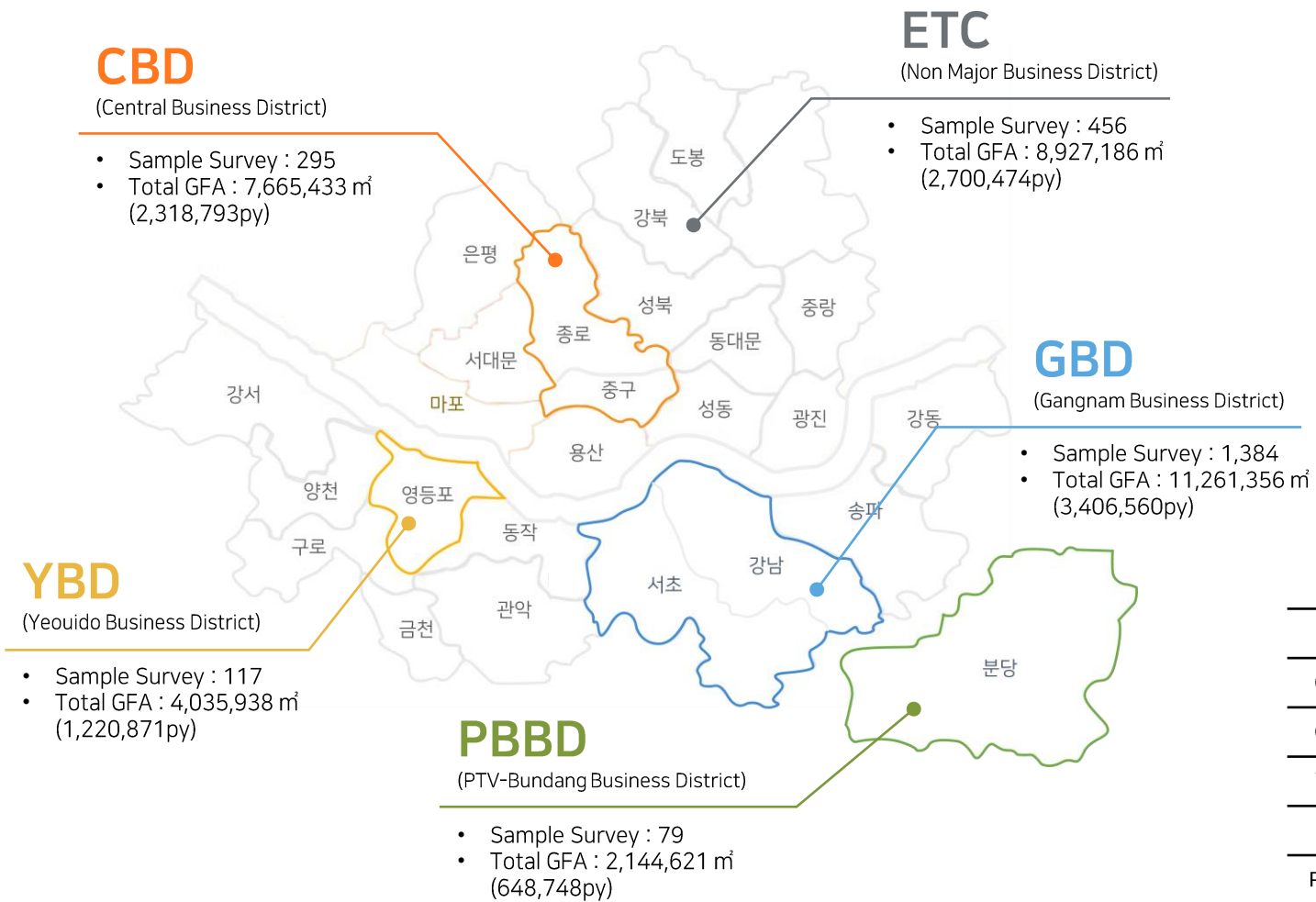
**여의도권**  
여의도, 영등포구 일대

**서울기타권**  
상암, 마포, 용산 등 주요권역에 속하지 않은 서울권역

**판교, 분당권**  
판교테크노밸리, 성남시 분당구 일대

## 오피스 규모별 분류기준

OKEY	P Grade Prime 빌딩	S Grade 대형 빌딩	A Grade 중대형 빌딩	B Grade 중소형 빌딩	C Grade 소형 빌딩
연면적	15,000py 이상	7,000py 이상	4,000py 이상	1,000py 이상	1,000py 미만
기준층 임대면적	500py 이상	300py 이상	200py 이상	150py 이상	150py 미만



Building Survey : Total 2,331

	P	S	A	B	C
CBD	44	70	36	84	61
GBD	28	85	93	448	730
YBD	19	24	32	36	6
ETC	48	61	63	138	146
PBBD	11	18	13	30	7

• NOC (Net Occupancy Cost)

오피스시장의 특성상 임대형태(전세, 월세) 및 빌딩특성이 각각 다른 오피스 빌딩의 비교를 위하여 전용면적 1평당 임대 할 때 필요한 비용을 월 단위로 환산한 수치

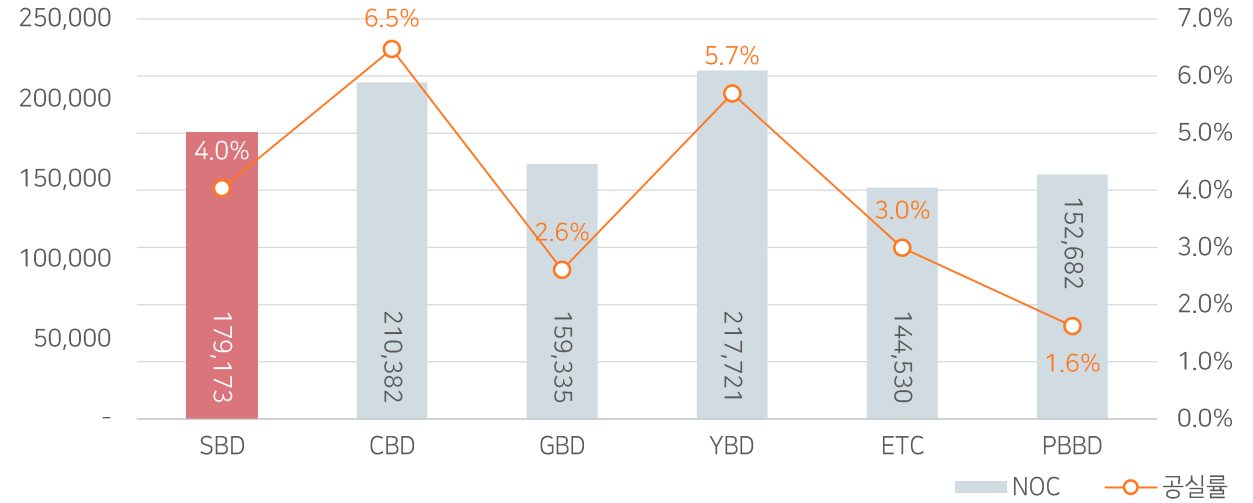
# 01 SBD 서울 전체

공실률  
4.03% ↓

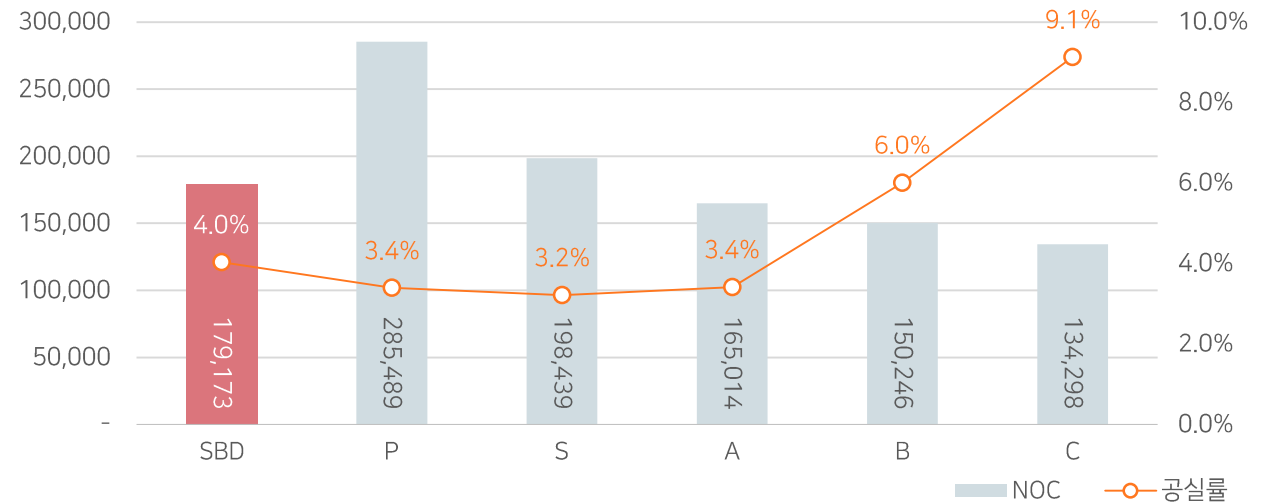
평균 NOC  
₩ 179,173 ↓

평균 임대료	평균 보증금	평균 관리비
80,221	949,819	27,886

2021년도 12월 조사한 서울지역 오피스의  
평균 공실률은 4.03%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 179,173원으로 조사되었다.



■ 서울 전체 권역 별 공실률 / NOC



■ 서울 전체 규모 별 공실률 / NOC

# 01 SBD 서울 전체

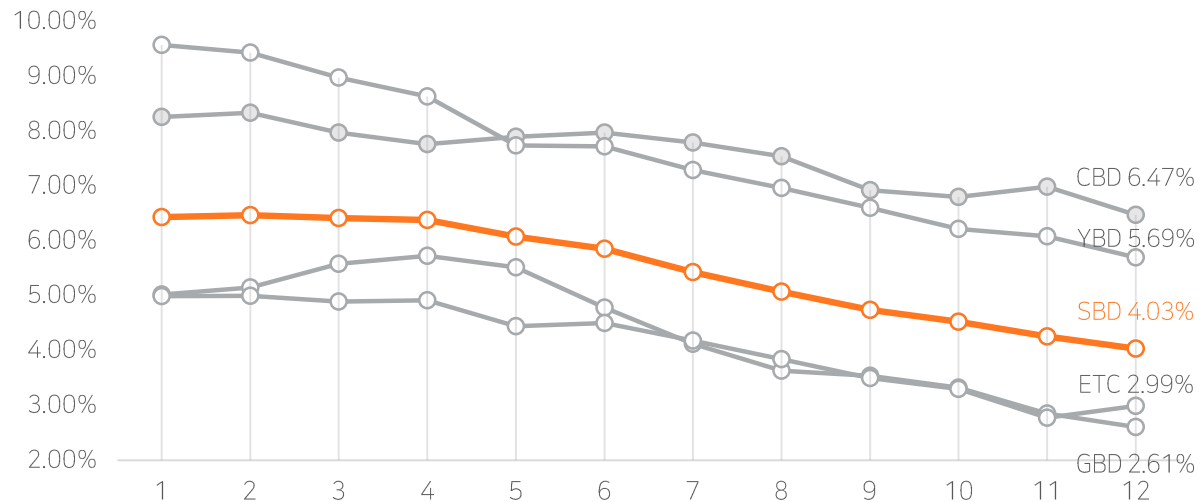
2021년 12월 서울권역의 공실률 흐름은 다음과 같이 조사되었다.

CBD의 센트로폴리스에서 SSG닷컴이 사용중인 2개 층 3,450평의 면적이 올해 중순 임대시장에 나올 예정이고, 센터원에서 더보스턴컨설팅 그룹이 사용중인 2개 층 반 2,060평의 면적이 임대시장에 추가되었다.

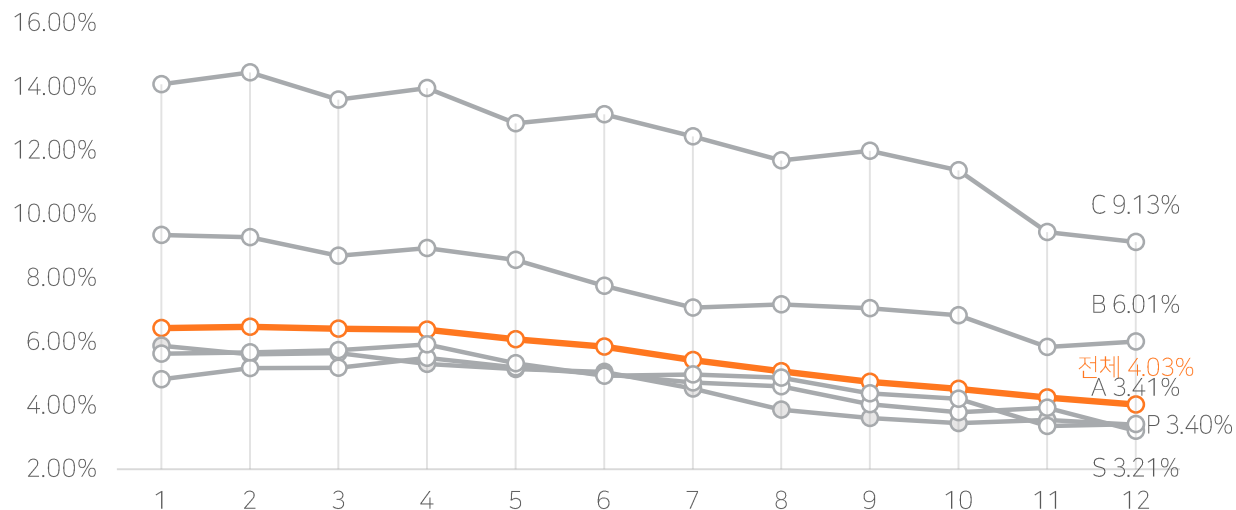
GBD의 99빌딩는 패스트파이브가 입주계약을 맺으며 790평의 공실이 해소되었고, ICT타워에 고미코퍼레이션이 계약하여 3개 층 550평의 공실이 해소되었다.

YBD에서는 파크원 타워1에 코웰패션, 우리자산운용이 2,230평 입주하였고, 타워2에는 아너스자산운용 등이 입주하여 총 6,260평의 공실이 해소되었다.

웰컴금융그룹과 계열사들이 용산 사옥을 매입하여 이전이 결정됨에 따라 구로의 지밸리비즈프라자에 4,760평의 공실이 올 하반기에 추가될 예정이다.



■ 서울 권역별 공실률 변화



■ 서울 규모별 공실률 변화

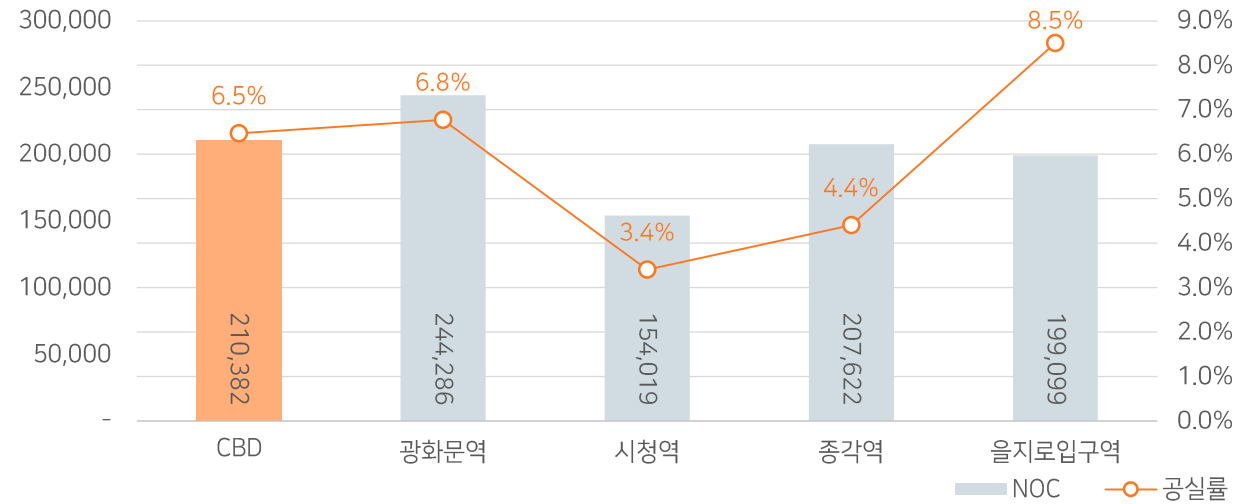
# 02 CBD 도심권역

공실률  
6.47% ↓

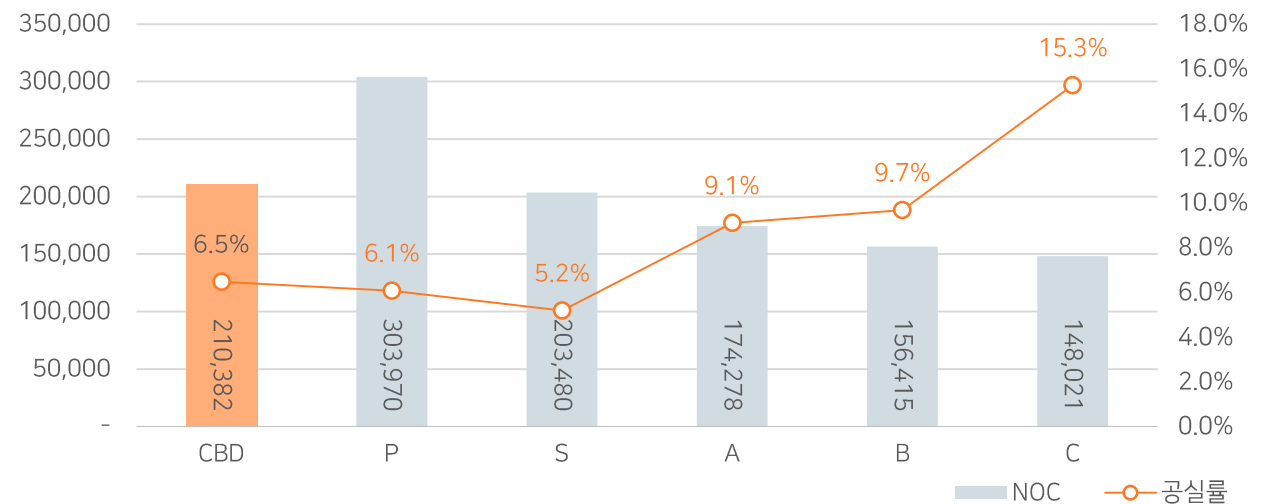
평균 NOC  
₩ 210,382 ↓

평균 임대료	평균 보증금	평균 관리비
89,744	919,363	35,383

2021년도 12월 조사한 도심지역 오피스의  
평균 공실률은 6.47%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 210,382원으로 조사되었다.



■ CBD 지역 세부권역 별 공실률 / NOC



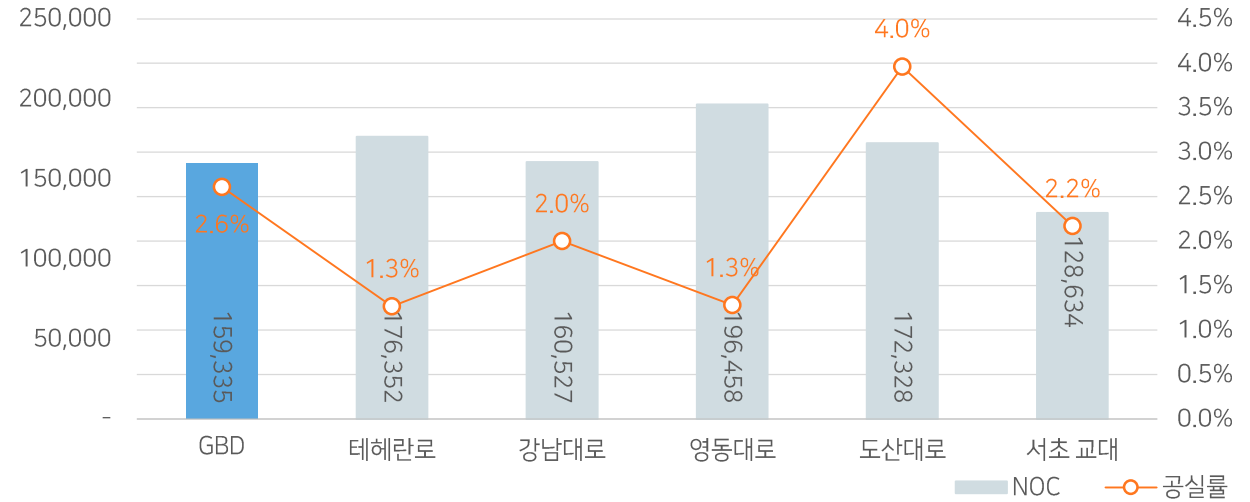
■ CBD 지역 규모 별 공실률 / NOC

# 73 GBD 강남권역

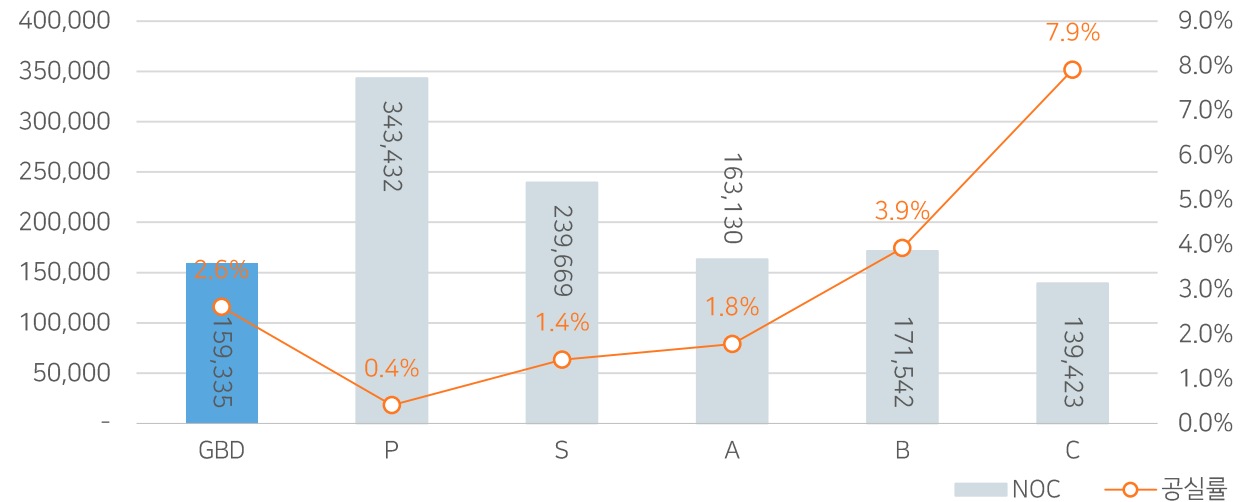
공실률 2.61% ↓ 평균 NOC ₩ 159,335 ↓

평균 임대료	평균 보증금	평균 관리비
85,476	1,191,363	22,997

2021년도 12월 조사한 강남지역 오피스의 평균 공실률은 2.61%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 159,335원으로 조사되었다.



■ GBD 지역 세부권역별 공실률/NOC



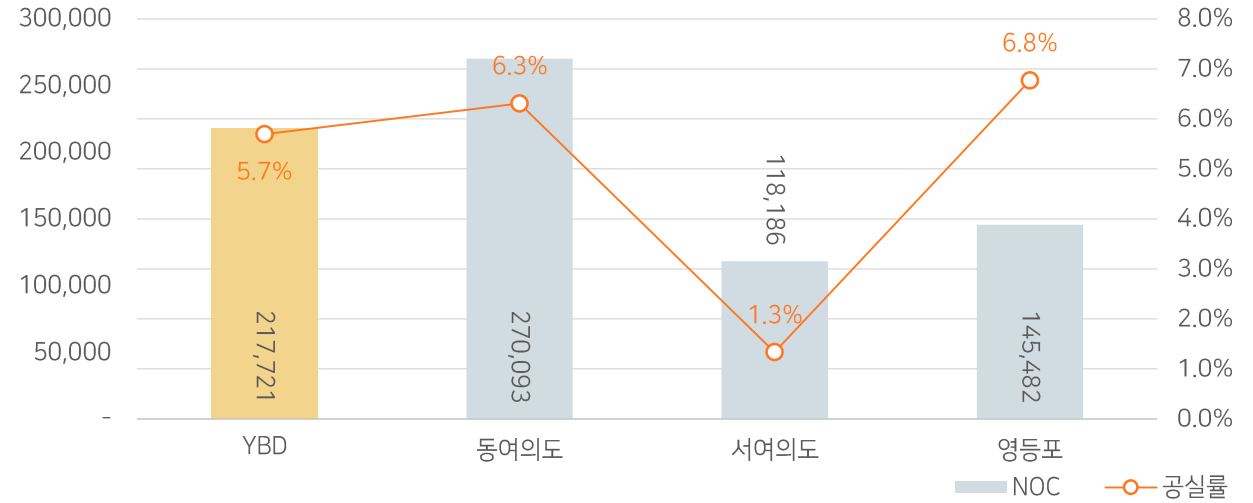
■ GBD 지역 규모 별 공실률/NOC

# 24 YBD 여의도, 영등포 권역

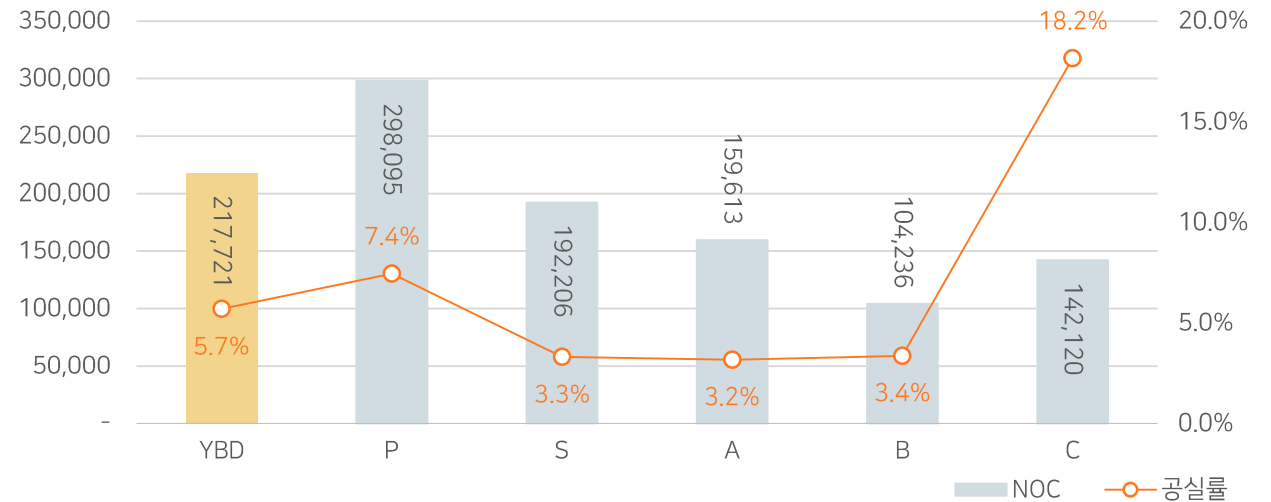
공실률 5.69% ↓  
 평균 NOC ₩ 217,721 ↓

평균 임대료	평균 보증금	평균 관리비
77,955	823,292	33,018

2021년도 12월 조사한 여의도, 영등포 지역  
 오피스의 평균 공실률은 5.69%로 조사되었으며,  
 전용면적 1평당 사용할 때 드는 비용을 계산한  
 평균 NOC는 217,721원으로 조사되었다.



■ YBD 지역세부권역별 공실률/NOC



■ YBD 지역규모 별 공실률/NOC

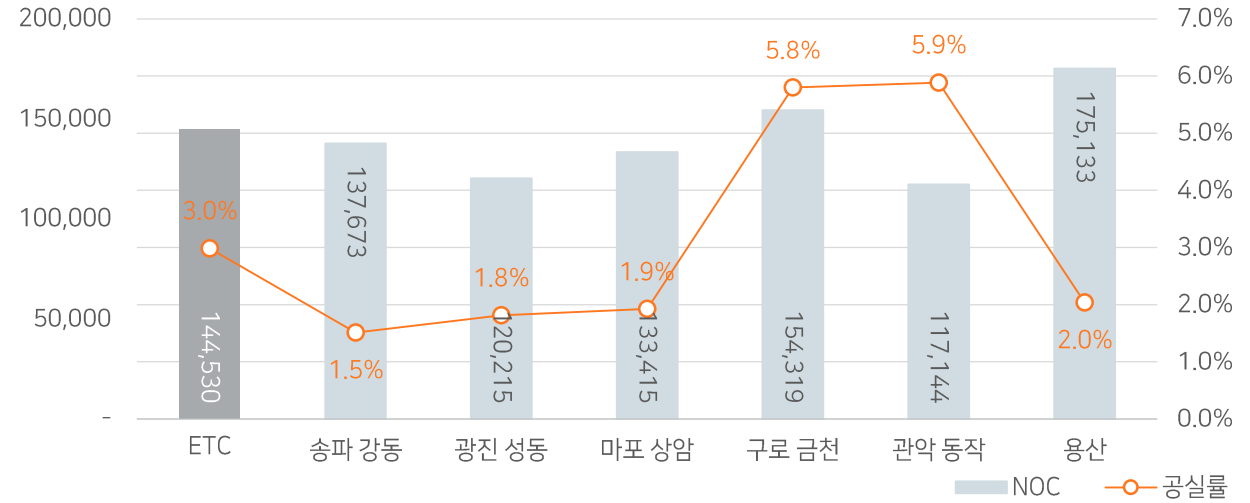
# 75 ETC 서울 기타권역

공실률  
2.99% ↑

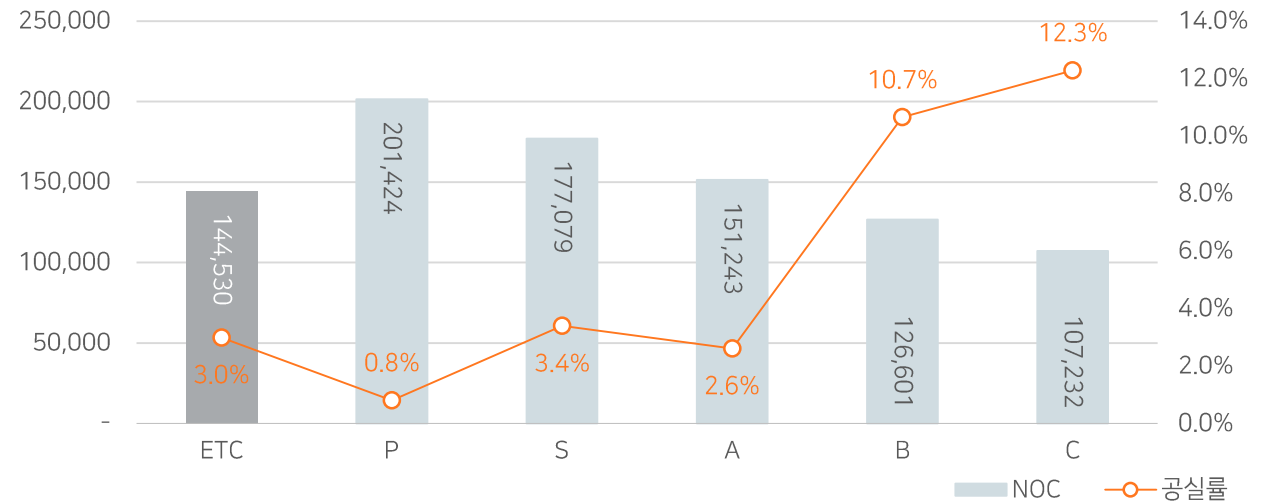
평균 NOC  
₩ 144,530 ↓

평균 임대료	평균 보증금	평균 관리비
60,498	746,730	20,007

2021년도 12월 조사한 서울 기타지역 오피스의  
평균 공실률은 2.99%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 144,530원으로 조사되었다.



ETC 지역 세부권역별 공실률 / NOC



ETC 지역 규모별 공실률 / NOC

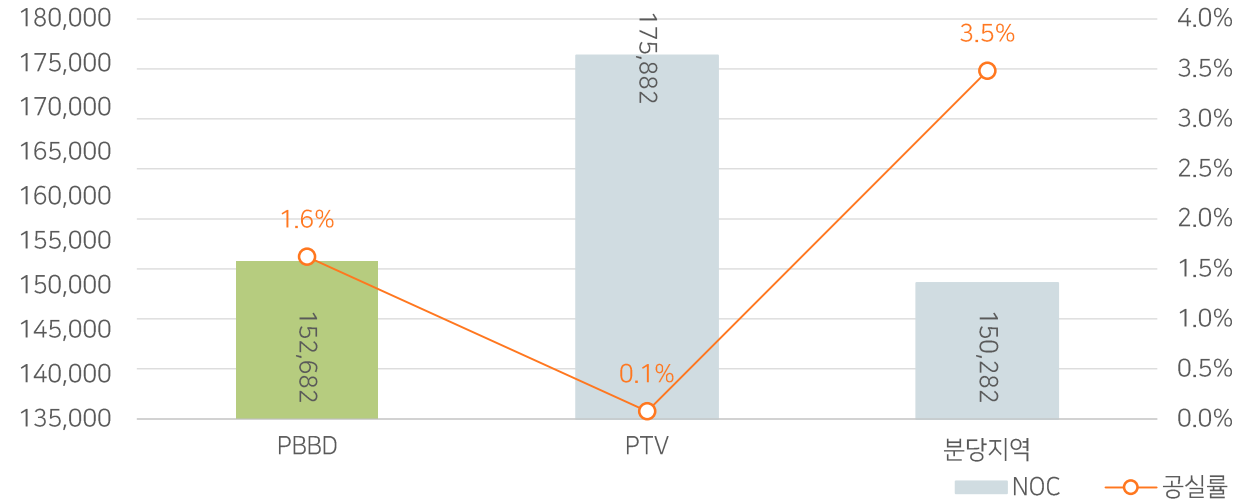
# 76 PBBD 판교, 분당 권역

공실률  
1.62% ↑

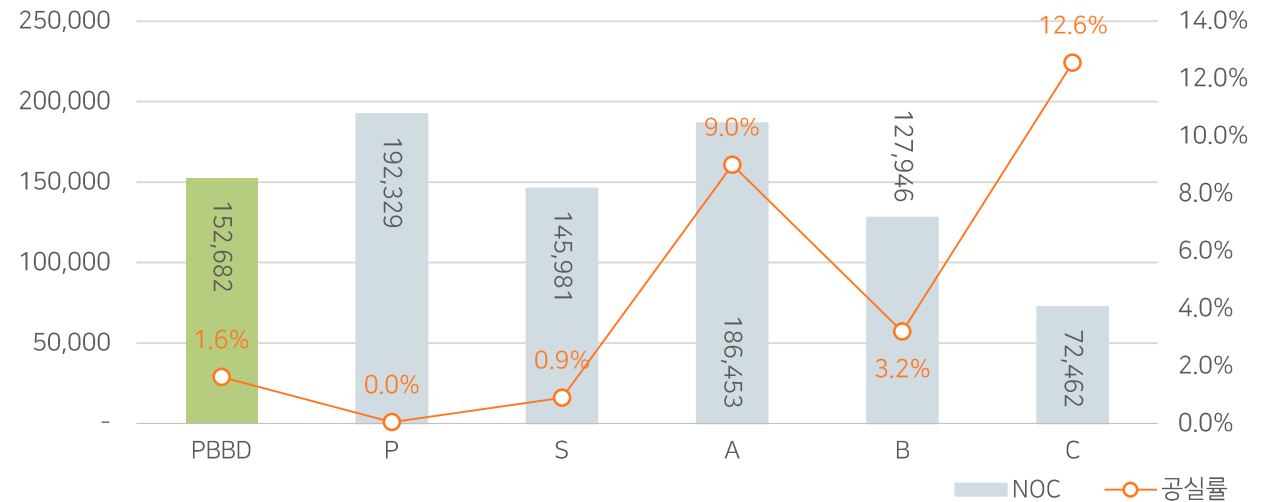
평균 NOC  
₩ 152,682 ↓

평균 임대료	평균 보증금	평균 관리비
55,409	670,425	24,877

2021년도 12월 조사한 판교, 분당지역 오피스의  
평균 공실률은 1.62%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 152,682원으로 조사되었다.



■ PBBD 지역 세부권역 별 공실률 / NOC



■ PBBD 지역 규모 별 공실률 / NOC

## 세부 지역 별 임대 현황

권역	세부권역	총임대면적	평균보증금	평균임대료	평균관리비	평균NOC	공실률
CBD	광화문역	282,264	1,027,027	103,542	37,452	244,286	6.78%
	시청역	272,657	671,485	66,646	30,303	154,019	3.40%
	종각역	325,302	887,271	87,273	35,221	207,622	4.40%
	을지로입구역	247,320	793,378	82,607	35,817	199,099	8.50%
GBD	테헤란로	1,065,327	1,164,499	87,252	25,952	176,352	1.27%
	강남대로	543,364	1,288,752	92,075	21,706	160,527	2.00%
	영동대로	201,644	1,038,239	94,310	26,169	196,458	1.28%
	도산대로	99,387	1,279,420	92,152	26,966	172,328	3.96%
	서초 교대	149,568	1,185,922	62,774	24,550	128,634	2.17%
YBD	동여의도	904,270	967,113	92,712	37,625	270,093	6.31%
	서여의도	164,662	477,433	47,506	28,394	118,186	1.33%
	영등포	151,939	652,932	58,527	24,247	145,482	6.77%
ETC	송파 강동	578,628	833,458	58,341	20,246	137,673	1.51%
	광진 성동	240,603	932,375	62,361	15,270	120,215	1.81%
	마포 상암	677,191	643,179	57,039	21,960	133,415	1.94%
	구로 금천	268,594	600,850	56,883	14,328	154,319	5.80%
	관악 동작	194,285	937,630	55,028	16,329	117,144	5.88%
	용산	393,865	961,805	79,426	27,290	175,133	2.03%
PBBD	PTV	354,231	666,387	60,395	21,916	175,882	0.08%
	분당지역	294,517	670,842	54,893	25,205	150,282	3.48%

지역 별  
사용승인 현황

권역	빌딩명	소재지	주용도	연면적(㎡)	연면적(3.3㎡)	사용승인일
GBD	HDC랩스타워	서초구 서초동	업무시설	7,982	2,415	25-Nov
	서초매디컬 센터	서초구 방배동	교육연구시설	4,795	1,450	10-Nov
	아시아 미디어 센터	강남구 역삼동	업무시설	3,474	1,051	04-Nov
YBD	리드원센터	영등포구 당산동3가	공장	35,782	10,824	11-Nov
ETC	Genexine ProGen Bio Innovation Park	강서구 마곡동	교육연구시설	39,079	11,821	15-Nov
	서울숲에이원센터	성동구 성수동1가	공장	36,501	11,042	04-Nov
	하우스디 가산퍼스타	금천구 가산동	공장	26,481	8,010	12-Nov
	서울창업허브M+(마곡)	강서구 마곡동	업무시설	21,600	6,534	11-Nov
	비즈니스 타워	동대문구 장안동	자동차관련시설	7,752	2,345	10-Nov
	이태원 근생빌딩	용산구 이태원동	제2종근린생활시설	6,494	1,964	05-Nov
	팍스에비뉴	강동구 강일동	제2종근린생활시설	5,207	1,575	02-Nov
PBB	(주)성지공조기술 사옥	성남시 분당구	제2종근린생활시설	1,043	316	03-Nov

## Survey Overview

Target Areas	All districts in Seoul and Pangyo & Bundang districts
Target Samples	Commercial properties of 4 stories or more, and with a gross floor area of 1,000m <sup>2</sup> (=300py) or more
Survey Method	Telephone enquiry, publications from property management and Korea's government
Main Focus	Market trend in a property industry, changes in vacancy rate and tenants' inflow/outflow etc.
Survey Period	One calendar month, December 2021
DB Mangement	Okey Research Center has carried out our research with a large numbers of sample data and provided the vacancy and rent information of office buildings via our office lease platform 'OKEY- Office Key'.
Exchange Rate	1 USD = 1,202.50 KRW (0.83 USD = 1,000 KRW) as at 6 January 2022

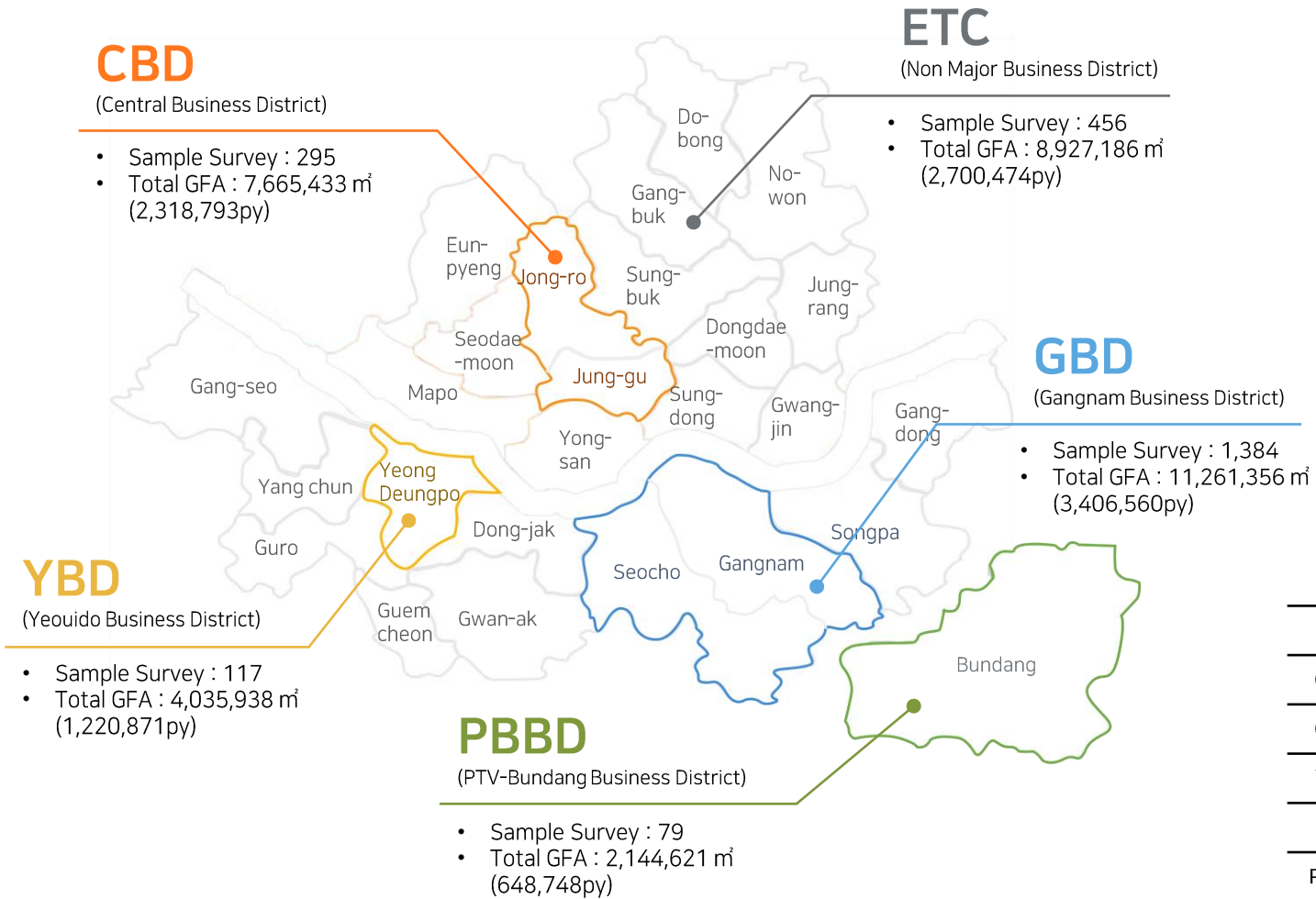
## 5 Regional Divisions in Seoul

CBD	GBD	YBD	ETC	PBBB
Central Business District	Gangnam Business District	Yeouido Business District	Non Major Business District	PTV-Bundang Business District
Jongro-gu, Jung-gu, etc.	Gangnam-gu, Seocho-gu, etc.	Yeouido, Yeongdeungpo-gu etc.	Songpa, Mapo, Yongsan and other areas outside Central Seoul	Pangyo Techno Valley, Bundang-gu in Sungnam-si etc.

## Categories of Office Buildings by Their Sizes

OKEY	P Grade Prime Building	S Grade Large Building	A Grade Large-Medium	B Grade Medium-Small	C Grade Small Building
Gross Floor Area	49,587m <sup>2</sup> (15,000py)	23,140m <sup>2</sup> (7,000py)	13,223m <sup>2</sup> (4,000py)	Above 3,306m <sup>2</sup> (Above 1,000py)	Under 3,306m <sup>2</sup> (Under 1,000py)
Lease Area of Sample Floor	1,653m <sup>2</sup> (500py)	992m <sup>2</sup> (300py)	661m <sup>2</sup> (200py)	Above 496m <sup>2</sup> (Above 150py)	Under 496m <sup>2</sup> (Under 150py)

## Sample Size of Each District



Building Survey : Total 2,331

	P	S	A	B	C
CBD	44	70	36	84	61
GBD	28	85	93	448	730
YBD	19	24	32	36	6
ETC	48	61	63	138	146
PBSD	11	18	13	30	7

### • NOC (Net Occupancy Cost)

The cost that 1m<sup>2</sup> of GFA incurs to a tenant who rents the property.  
NOC can be useful to compare between different types of office buildings.

# 01 SBD Seoul Capital Area

Vacancy rate

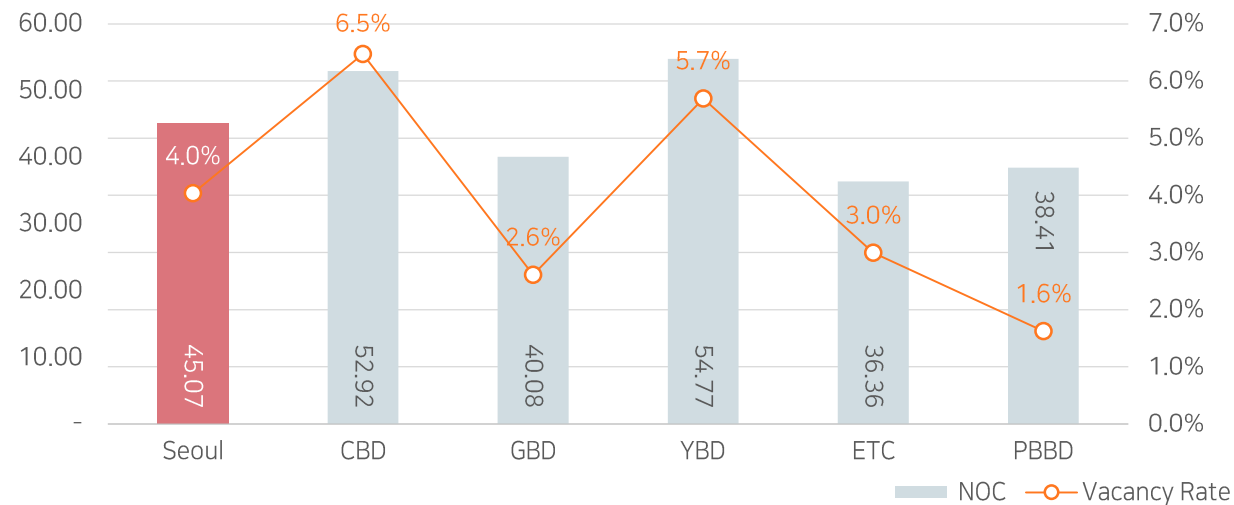
4.03% ↓

Avg, NOC

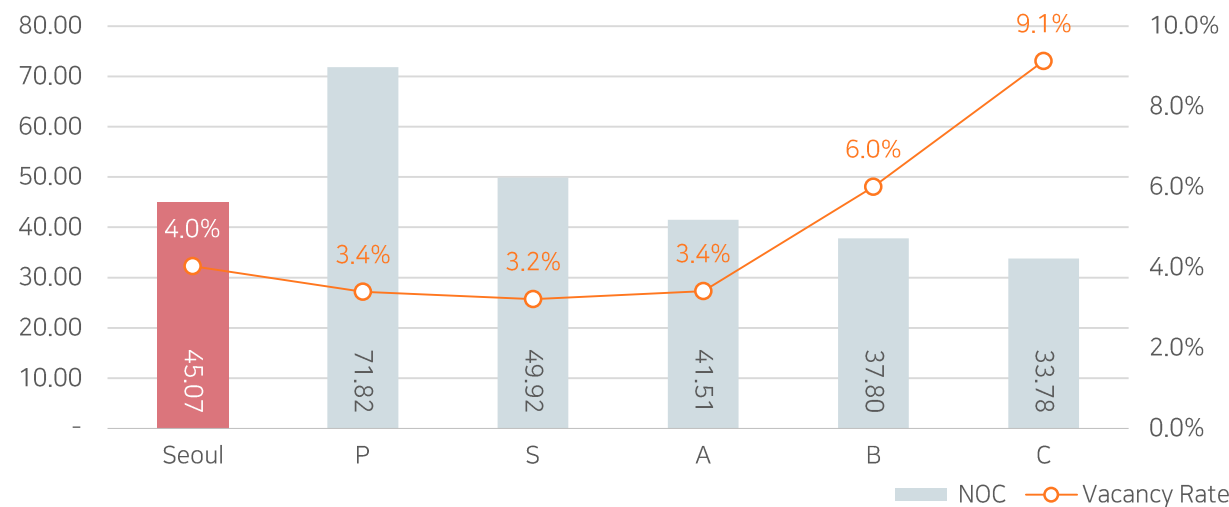
\$ 45.07 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
20.18	238.94	7.01

The average vacancy rate of the office buildings in Seoul is 4.03 % as at December 2021, and the average NOC is \$ 45.07.



■ Vacancy Rate & NOC in Seoul and Each District



■ Vacancy Rate & NOC in Seoul & Each Building Category

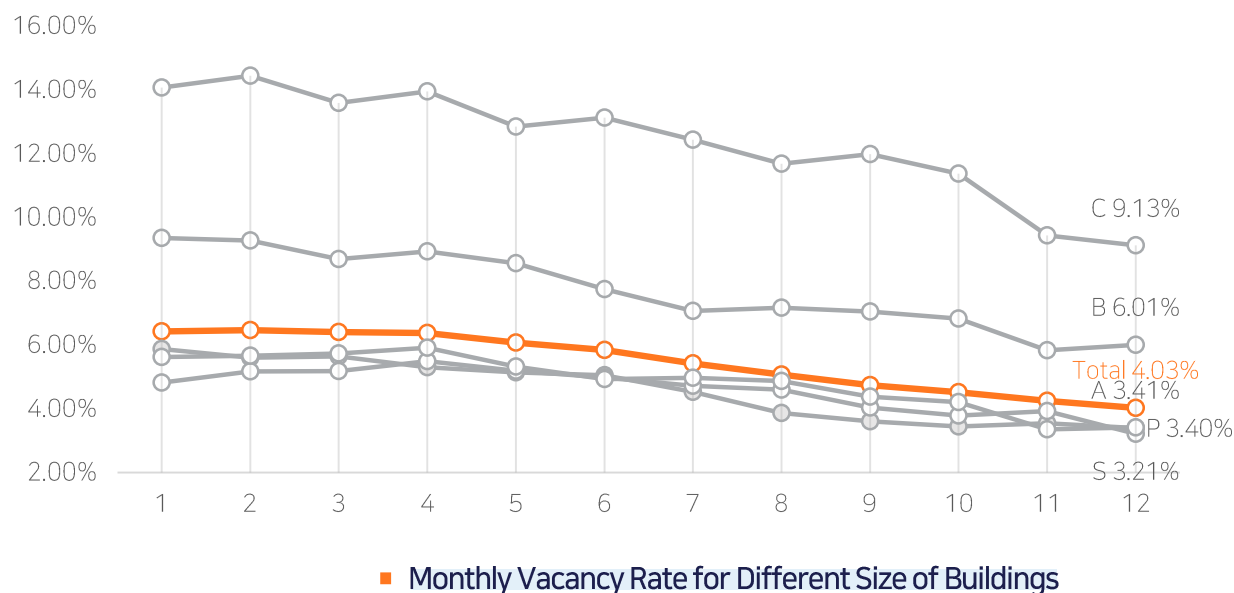
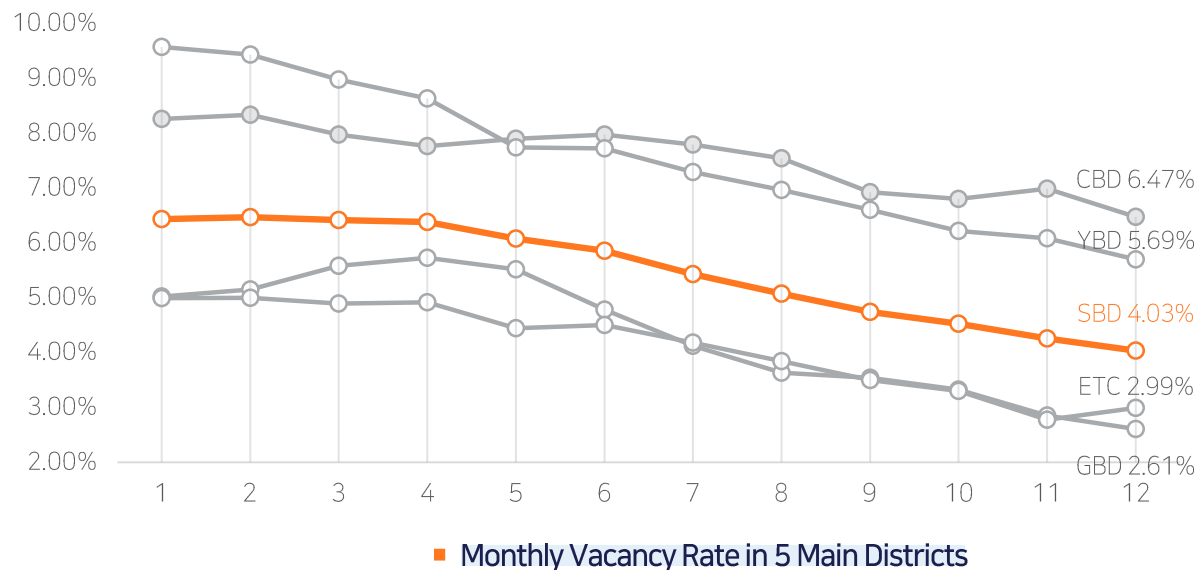
# 01 SBD Seoul Capital Area

The following charts indicate the vacancy level of Seoul during December 2021.

The two floors of total 11,410m<sup>2</sup> in Centropolis in CBD, currently occupied by SSG Dot-com, are going to come out to the market by mid this year,

And the two and half floors of total 6,820m<sup>2</sup> in Center-1, currently occupied by The Boston Consulting Group, already came out the market.

Fastfive signed the lease agreement with 99 Building in GBD, moving into the office space of 2,610m<sup>2</sup> in the building, and Gomi Corporation signed the agreement with ICT Tower, moving into the three-storey office space of 1,820m<sup>2</sup>. In YBD, Cowell Fashion and Woori Asset Management moved into the office space of 7,370m<sup>2</sup> in Parc1 Tower One, and Honors Asset Management and other tenants moved into the office space of 20,710m<sup>2</sup> in Parc1 Tower Two. On the other hand, Welcome Finance Group and its affiliates decided to move into their new office building in Yongsan, from G-valley Business Plaza, and this created the additional vacant units of 15,750m<sup>2</sup> in G-valley Business Plaza.



# 02 CBD Central Seoul

Vacancy rate

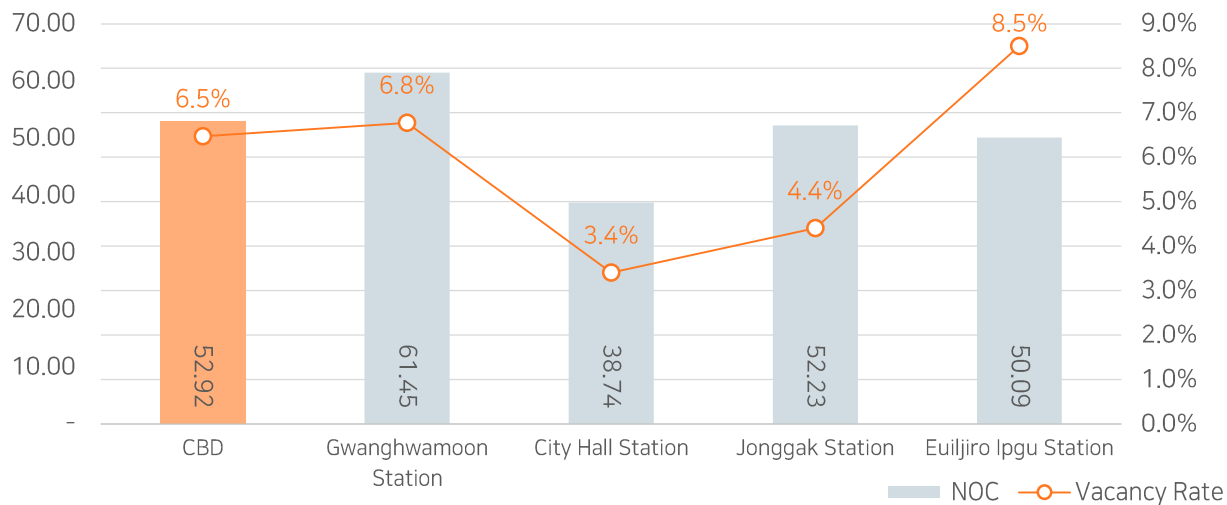
6.47% ↓

Avg, NOC

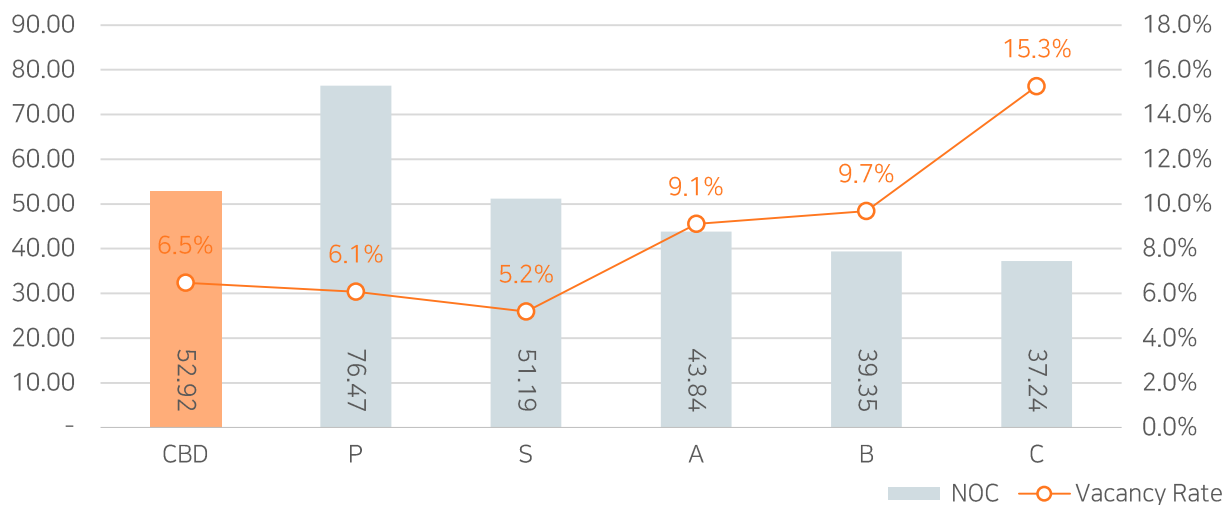
\$ 52.92 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
22.58	231.27	8.90

The average vacancy rate of the office buildings in CBD is 6.47 % as at December 2021, and the average NOC is \$ 52.92.



■ Vacancy Rate & NOC in Central Business District (CBD)



■ Vacancy Rate & NOC for Different Sizes of Building in CBD

# GBD Gangnam

Vacancy rate

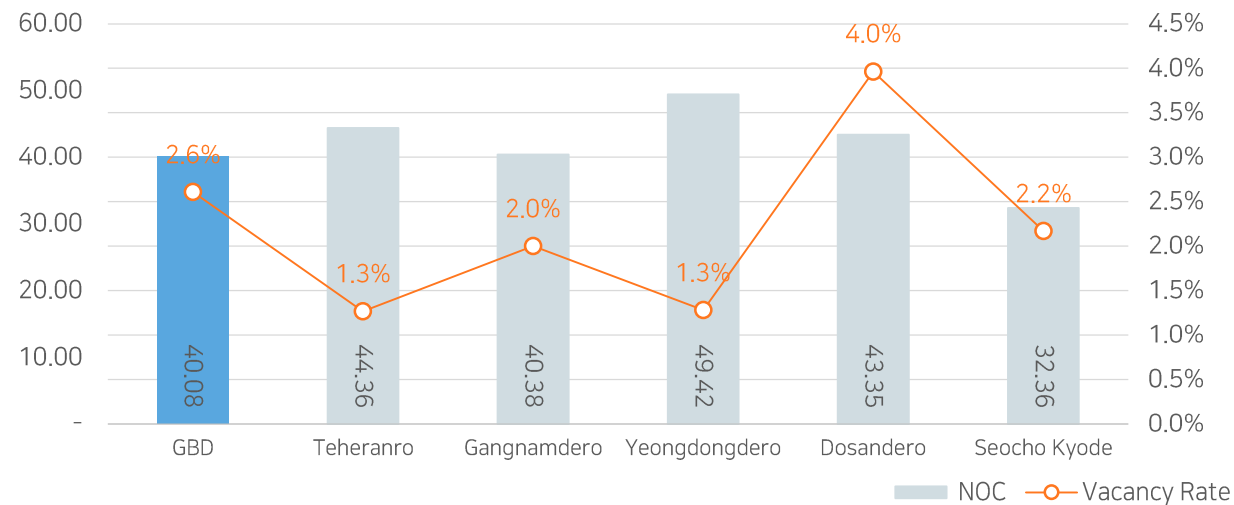
2.61 % ↓

Avg, NOC

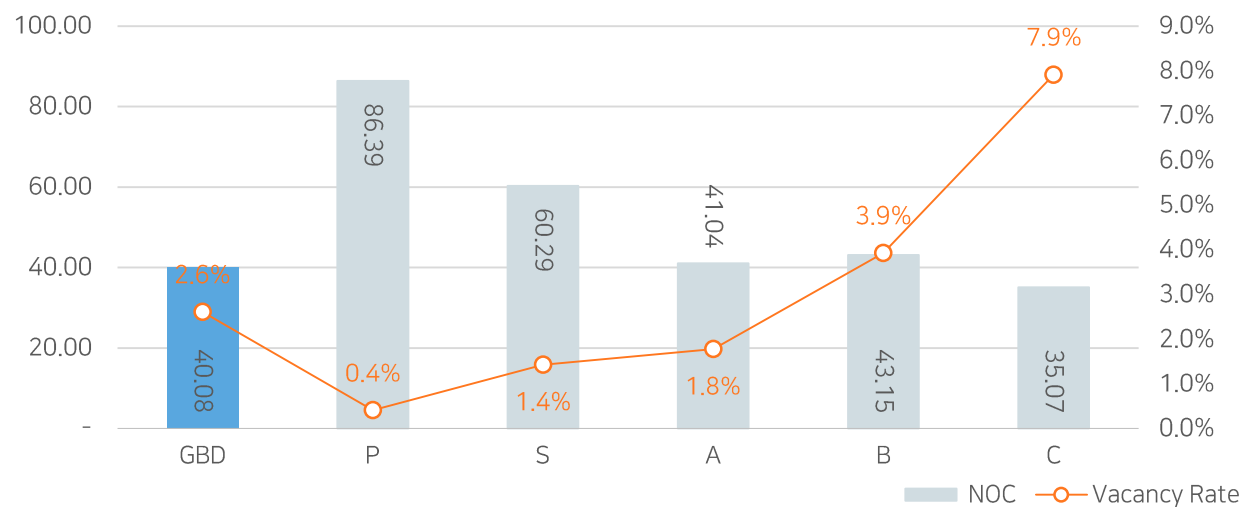
\$ 40.08 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
21.50	299.70	5.79

The average vacancy rate of the office buildings in GBD is 2.61 % as at December 2021, and the average NOC is \$ 40.08.



■ Vacancy Rate & NOC in Gangnam Business District (GBD)



■ Vacancy Rate & NOC for Different Sizes of Building in GBD

# 24 YBD Yeouido & Yeongdeungpo

Vacancy rate

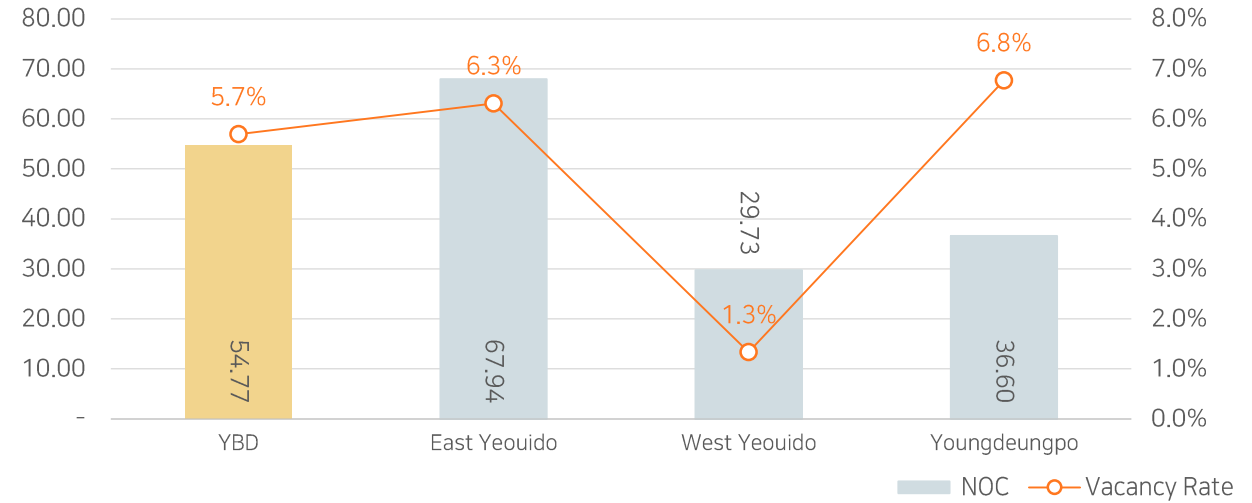
5.69% ↓

Avg, NOC

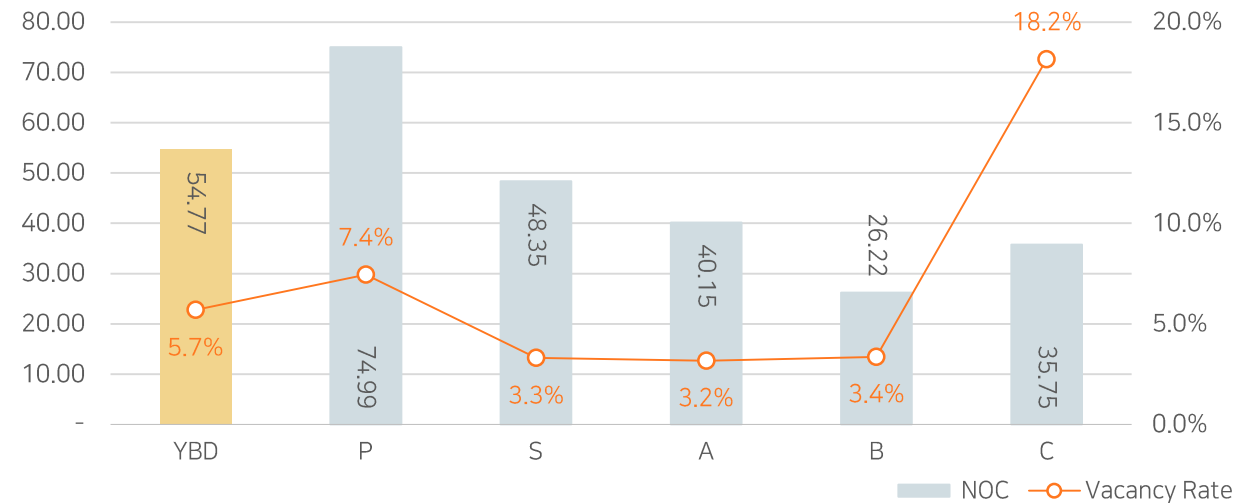
\$ 54.77 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
19.61	207.11	8.31

The average vacancy rate of the office buildings in YBD is 5.69 % as at December 2021, and the average NOC is \$ 54.77.



■ Vacancy Rate & NOC in Yeongdeungpo Business District (YBD)



■ Vacancy Rate & NOC for Different Sizes of Building in YBD

# 75 ETC Other District in Seoul

Vacancy rate

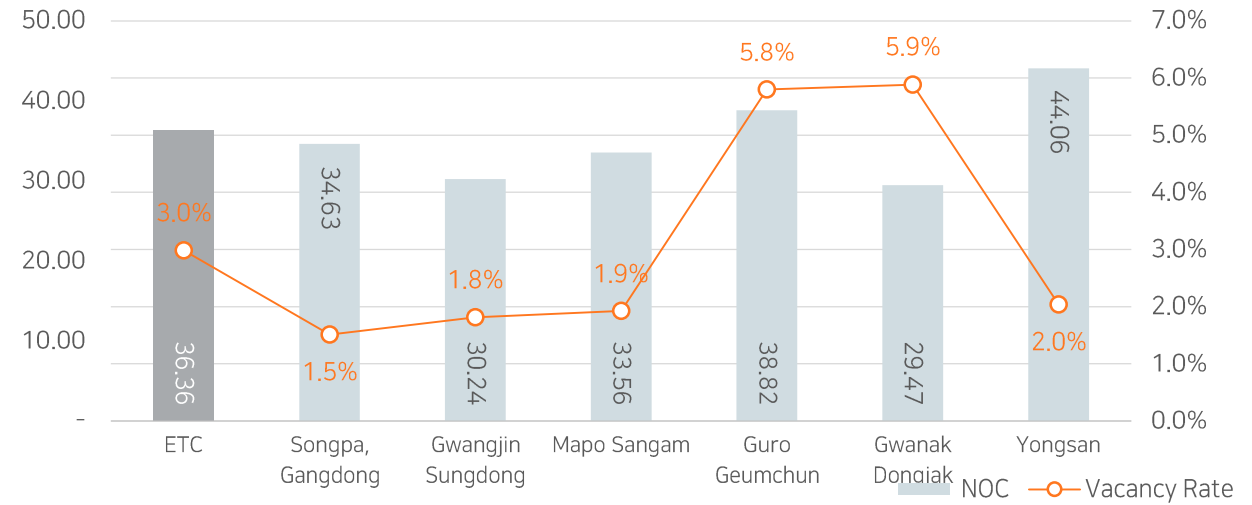
2.99% ↑

Avg, NOC

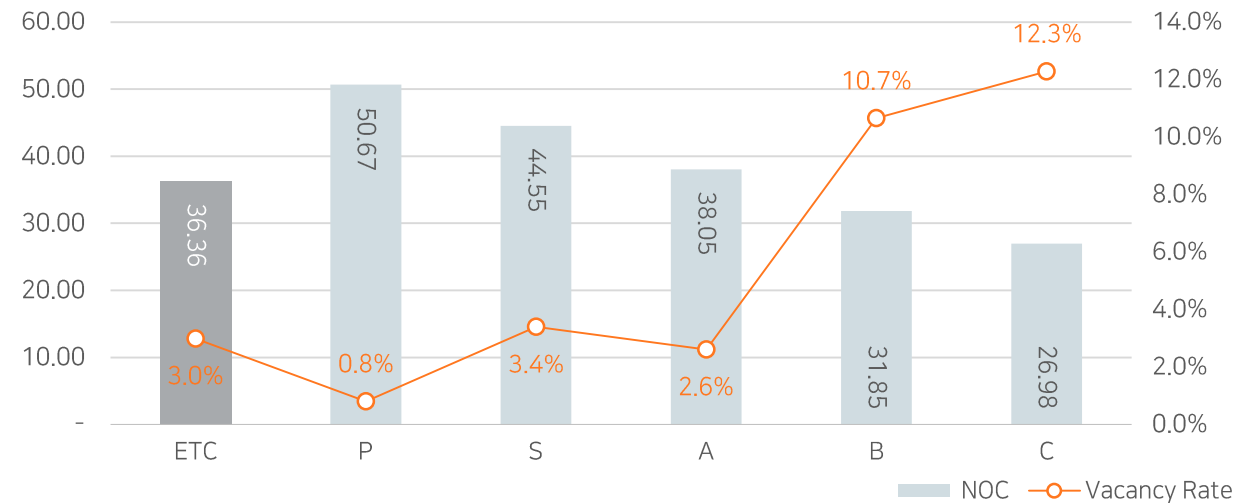
\$ 36.36 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
15.22	187.85	5.03

The average vacancy rate of the office buildings in ETC is 2.99 % as at December 2021, and the average NOC is \$ 36.36.



■ Vacancy Rate & NOC in Other District in Seoul (ETC)



■ Vacancy Rate & NOC for Different Sizes of Building in ETC

# 76 PBBD PANGYO & BUNDANG

Vacancy rate

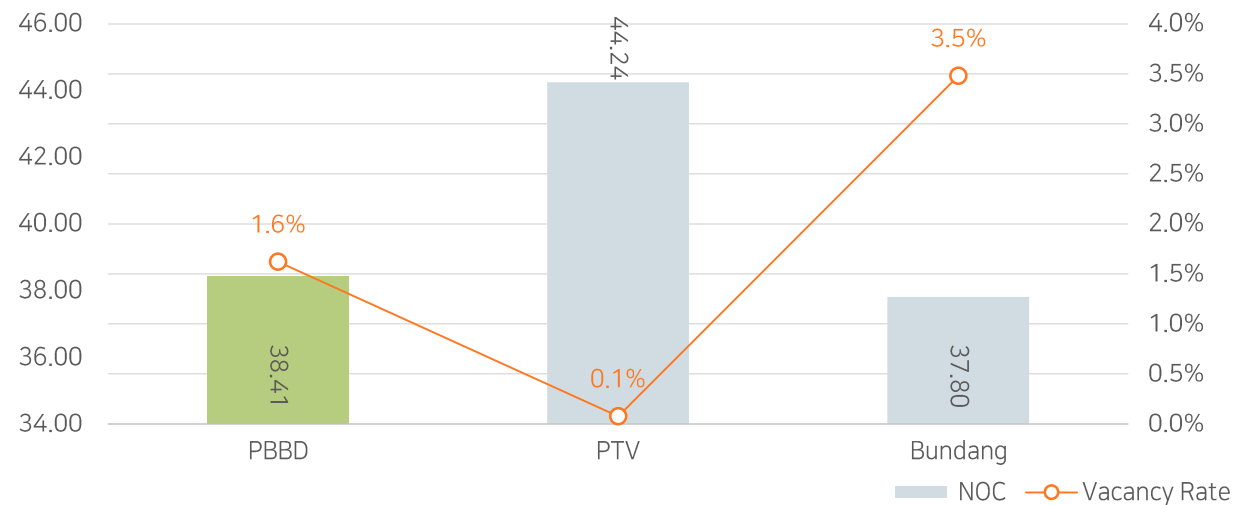
1.62% ↑

Avg, NOC

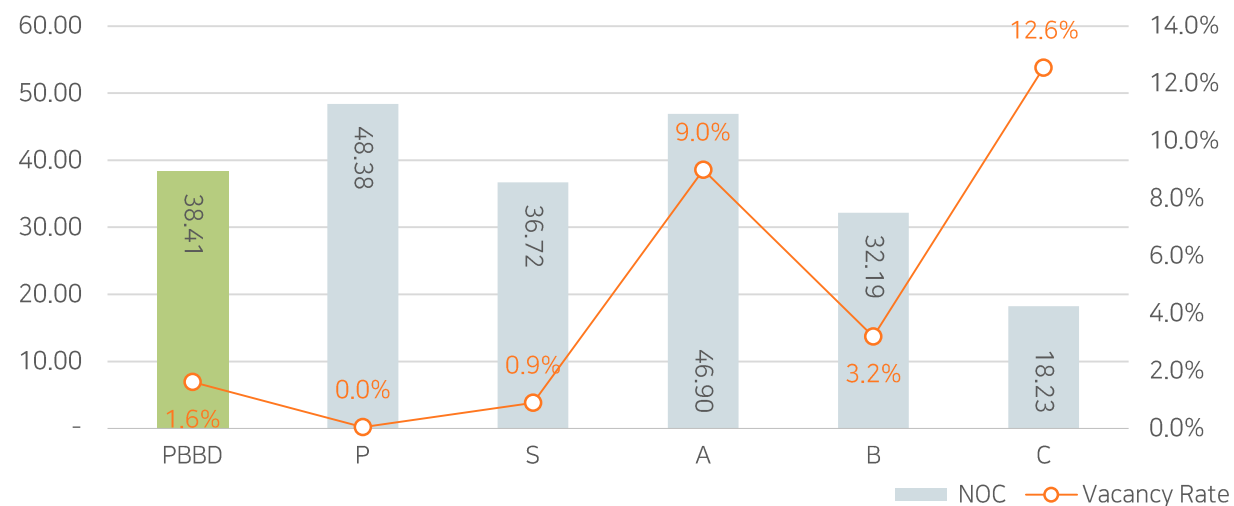
\$ 38.41 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
13.94	168.65	6.26

The average vacancy rate of the office buildings in PBBD is 1.62 % as at December 2021, and the average NOC is \$ 38.41.



■ Vacancy Rate & NOC in Pangyo & Bundang Business District (PBBD)



■ Vacancy Rate & NOC for Different Sizes of Building in PBBD



## Overall Lease status

Market	Submarket	Gross Leasing Area	Avg. Deposit	Avg. Rent	Avg. Mgmt. Fee	Avg. NOC	Vacancy rate
CBD	Gwanghwamoon Station	933,102	258.36	26.05	9.42	61.45	6.78%
	City Hall Station	901,345	168.92	16.77	7.62	38.74	3.40%
	Jonggak Station	1,075,378	223.20	21.95	8.86	52.23	4.40%
	Euiljiro Ipgu Station	817,587	199.58	20.78	9.01	50.09	8.50%
GBD	Teheranro	3,521,742	292.94	21.95	6.53	44.36	1.27%
	Gangnamdero	1,796,244	324.20	23.16	5.46	40.38	2.00%
	Yeongdongdero	666,593	261.18	23.72	6.58	49.42	1.28%
	Dosandero	328,552	321.85	23.18	6.78	43.35	3.96%
	Seocho Gyodae	494,438	298.33	15.79	6.18	32.36	2.17%
YBD	East Yeouido	2,989,323	243.29	23.32	9.47	67.94	6.31%
	West Yeouido	544,338	120.10	11.95	7.14	29.73	1.33%
	Youngdeungpo	502,278	164.25	14.72	6.10	36.60	6.77%
ETC	Songpa, Gangdong	1,912,820	209.66	14.68	5.09	34.63	1.51%
	Gwangjin Sungdong	795,382	234.55	15.69	3.84	30.24	1.81%
	Mapo Sangam	2,238,647	161.80	14.35	5.52	33.56	1.94%
	Guro Geumchun	887,914	151.15	14.31	3.60	38.82	5.80%
	Gwanak Dongjak	642,265	235.87	13.84	4.11	29.47	5.88%
	Yongsan	1,302,033	241.95	19.98	6.86	44.06	2.03%
PBBD	PTV	1,171,012	167.64	15.19	5.51	44.24	0.08%
	Bundang	973,609	168.76	13.81	6.34	37.80	3.48%



## Land Use Information by District

District	Building Name	Address	Land Use	GFA (㎡)	Completion
GBD	HDC Labs Tower	Seochogu Seochodong	Office Facilities	7,982	25-Nov
	Seocho Medical Tower	Seochogu Bangbedong	Educational Facilities	4,795	10-Nov
	Asia Media Center	Gangnamgu Yeoksamdong	Office Facilities	3,474	04-Nov
YBD	Lead One Center	Youngdeungpogu Dangsandong 3ga	Factory	35,782	11-Nov
ETC	Genexine ProGen Bio Innovation Park	Gangseogu Magokdong	Educational Facilities	39,079	15-Nov
	Seoul Forest A1 Tower	Sungdonggu Sungsoodong 1ga	Factory	36,501	04-Nov
	Haus D Gasan	Geumchungu Gasandong	Factory	26,481	12-Nov
	Seoul Startup Hub M+	Gangseogu Magokdong	Office Facilities	21,600	11-Nov
	Business Tower	Dongdaemoongu Jangandong	Automobile Facilities	7,752	10-Nov
	Itaewon Retail Building	Yongsangu Itaewondong	#2 Commercial Area	6,494	05-Nov
	Pax Avenue	Gangdonggu Gangildong	#2 Commercial Area	5,207	02-Nov
PBBD	Sungji Air Conditioning Tech	Sungnamsi Bundanggu	#2 Commercial Area	1,043	03-Nov

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