

# SEOUL OFFICE LEASING

February 2022 Monthly Market Review

## 조사개요

지역	서울 전 지역 및 판교, 분당 지역
대상	연면적 1,000㎡(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	2022년 1월 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

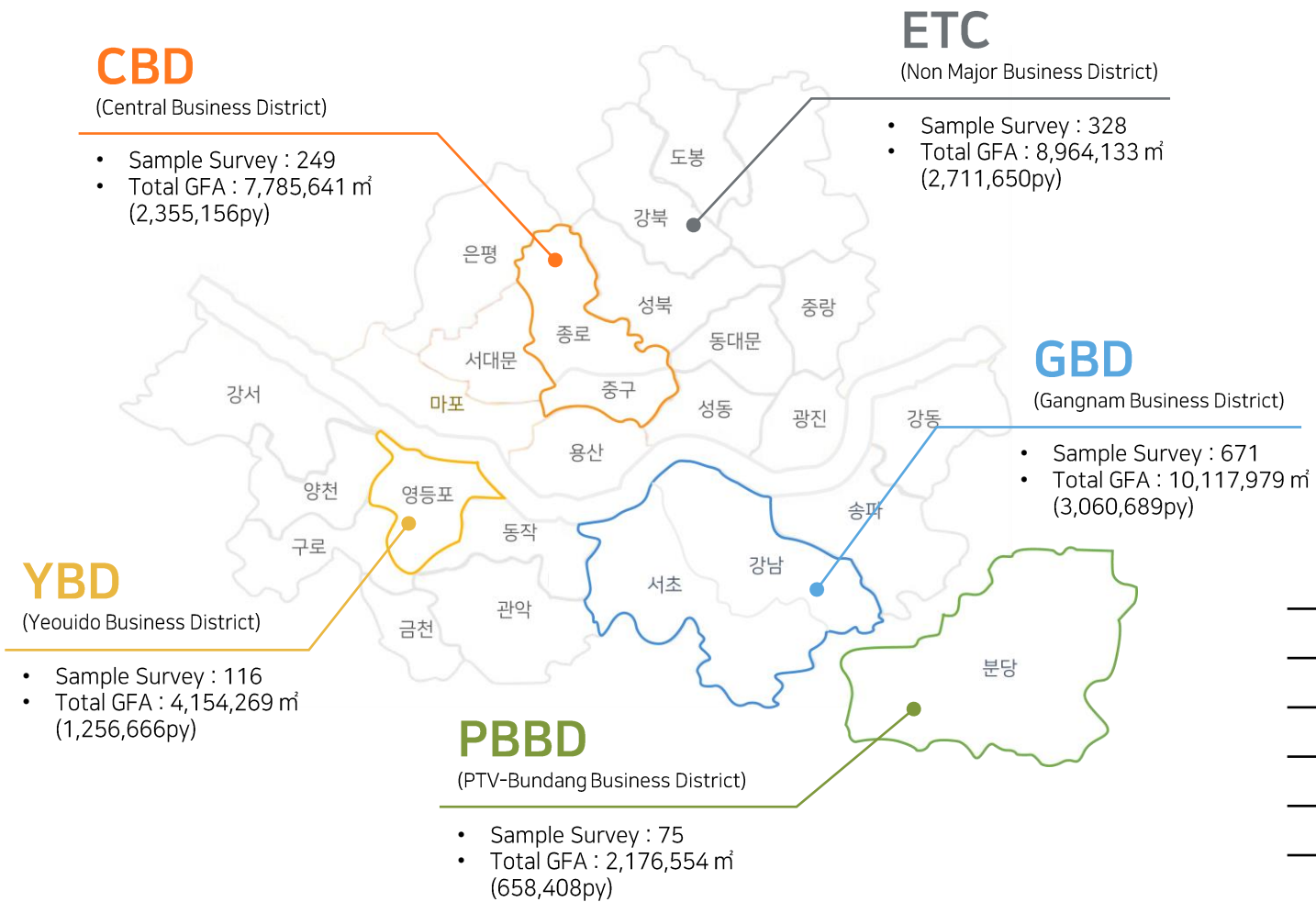
**여의도권**  
여의도, 영등포구 일대

**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 1,439

	P	S	A	B
CBD	45	70	36	98
GBD	28	86	93	464
YBD	20	24	32	40
ETC	49	61	66	152
PBBD	11	18	15	31

● 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

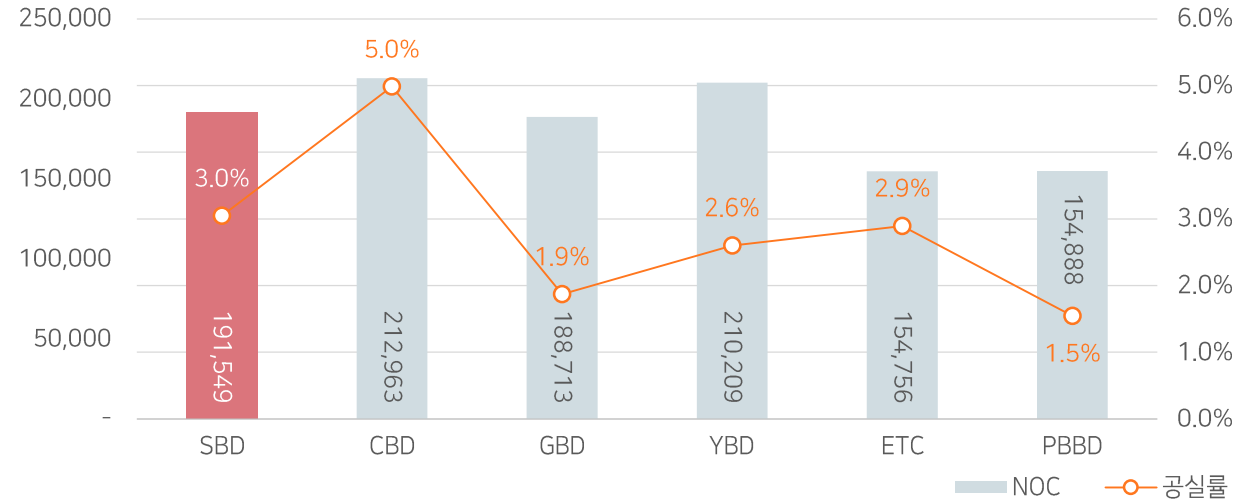
# 01 SBD 서울 전체

공실률  
3.05% ↓

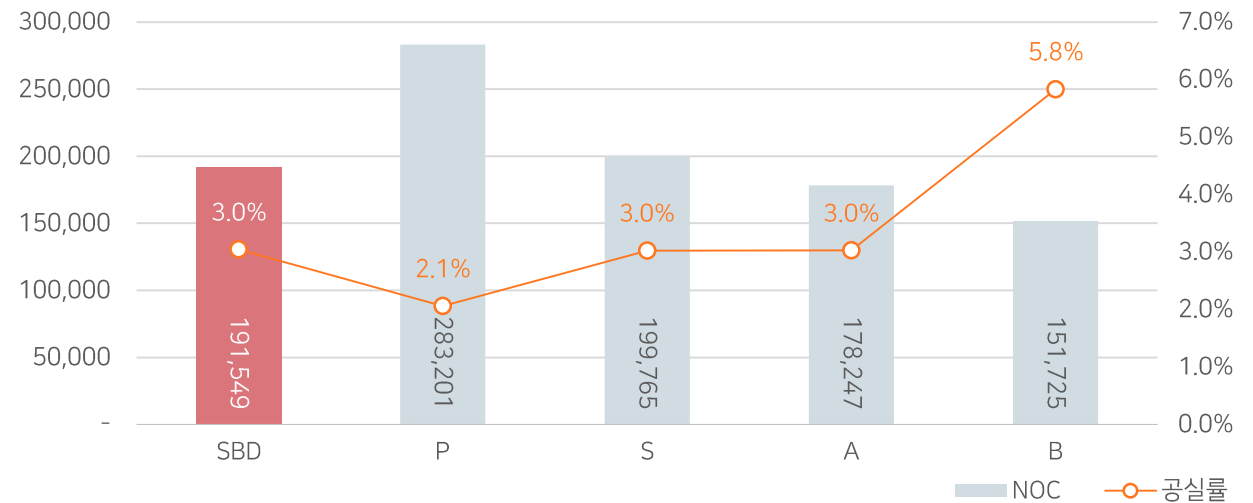
평균 NOC  
₩ 191,549 ↓

평균 임대료	평균 보증금	평균 관리비
78,599	877,763	30,104

2022년도 1월 조사한 서울지역 오피스의  
평균 공실률은 3.05%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 191,549원으로 조사되었다.



■ 서울 전체 권역 별 공실률 / NOC



■ 서울 전체 규모 별 공실률 / NOC



# 01 SBD 서울 전체

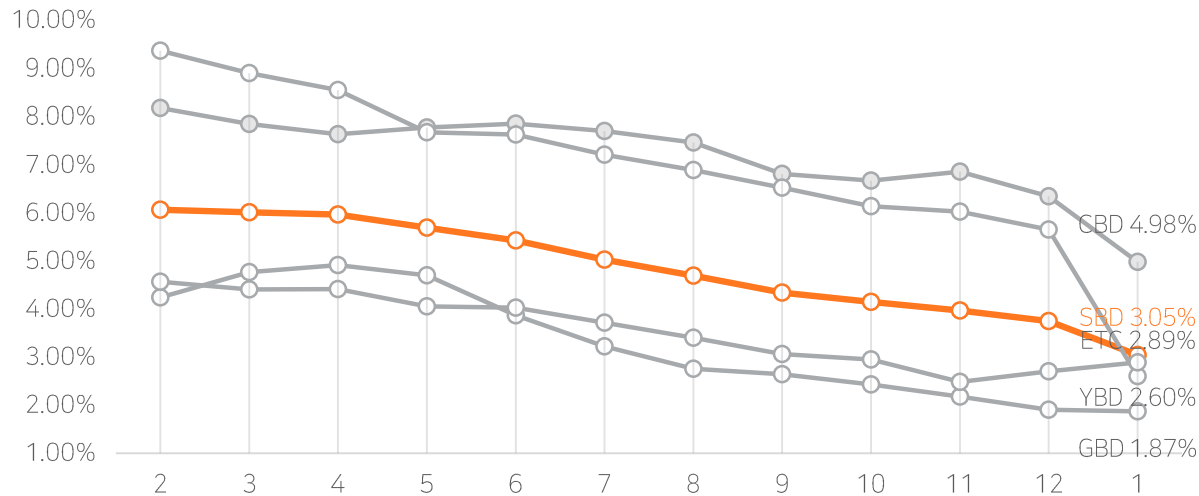
2022년 1월 서울권역의 공실률 흐름은 다음과 같이 조사되었다.

CBD의 그랜드센트럴에 현대캐피탈이 11개 층, 서민금융진흥원이 5개 층, 포스코인터내셔널이 3개 층에 입주하며 총 12,740평의 공실이 해소되었고, 지난해 중순에 계약한 법무법인 지평이 6개 층 총 3,810평에 이전을 완료하였다.

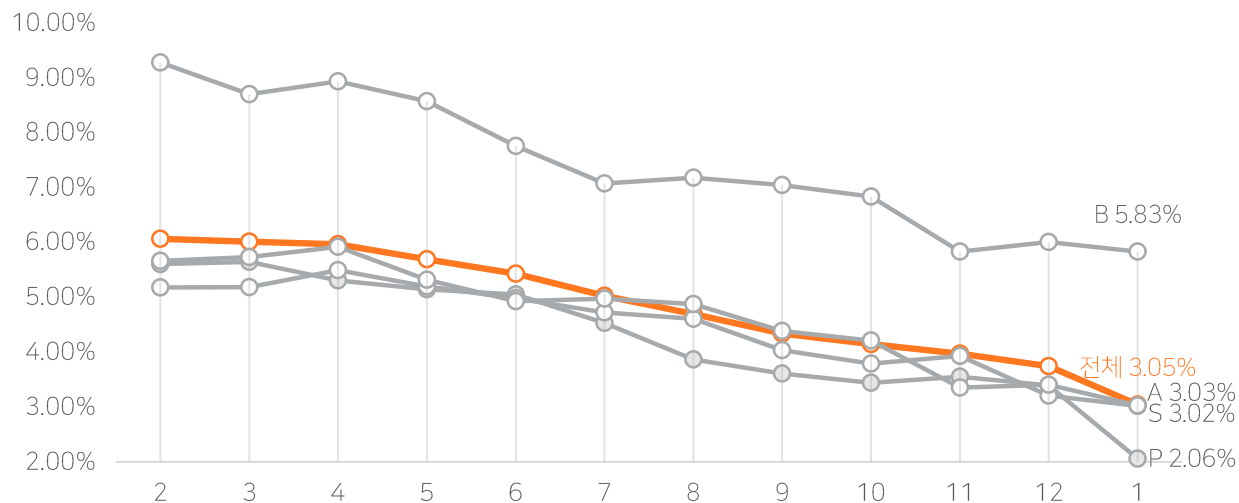
GBD의 센터필드에는 외국계 IT기업이 2개 층에 계약하며 2,210평의 공실이 해소되었고, 지난해 중순에 계약한 엔픽셀이 3개 층 총 3,210평에 이전을 완료하였다.

YBD의 파크원에 HMM이 9개 층을 계약하는 등 총 15개 층 15,570평의 공실이 해소되었고, TCC동양사옥에 CBRE가 3개 층, 빨간펜이 1개 층을 사용하는 등 총 2,470평의 공실이 해소되었다.

영등포 제일빌딩에 대림 비엔코가 계약하여 5개 층 총 1,590평이 해소되었다.



■ 서울 권역별 공실률 변화



■ 서울 규모별 공실률 변화

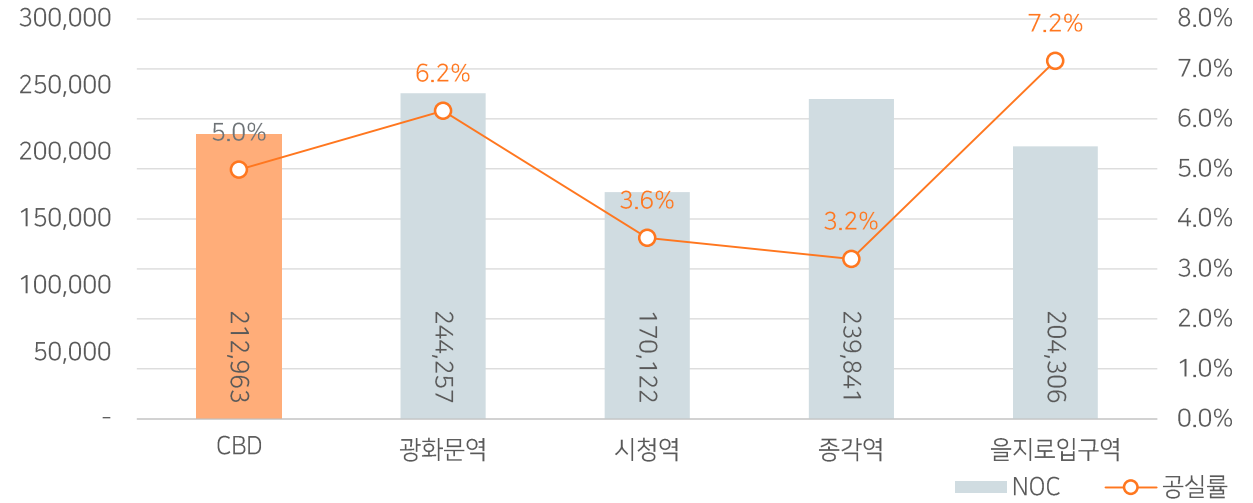
# 02 CBD 도심권역

공실률  
4.98% ↓

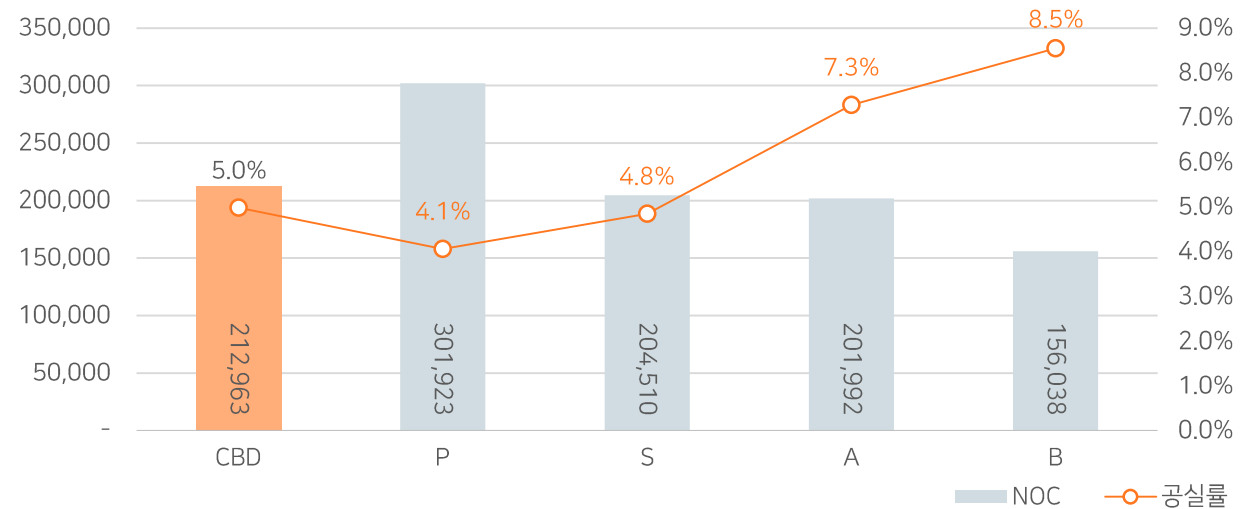
평균 NOC  
₩ 212,963 ↓

평균 임대료	평균 보증금	평균 관리비
87,693	878,386	35,889

2022년도 1월 조사한 도심지역 오피스의  
평균 공실률은 4.98%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 212,963원으로 조사되었다.



■ CBD 지역 세부권역별 공실률 / NOC



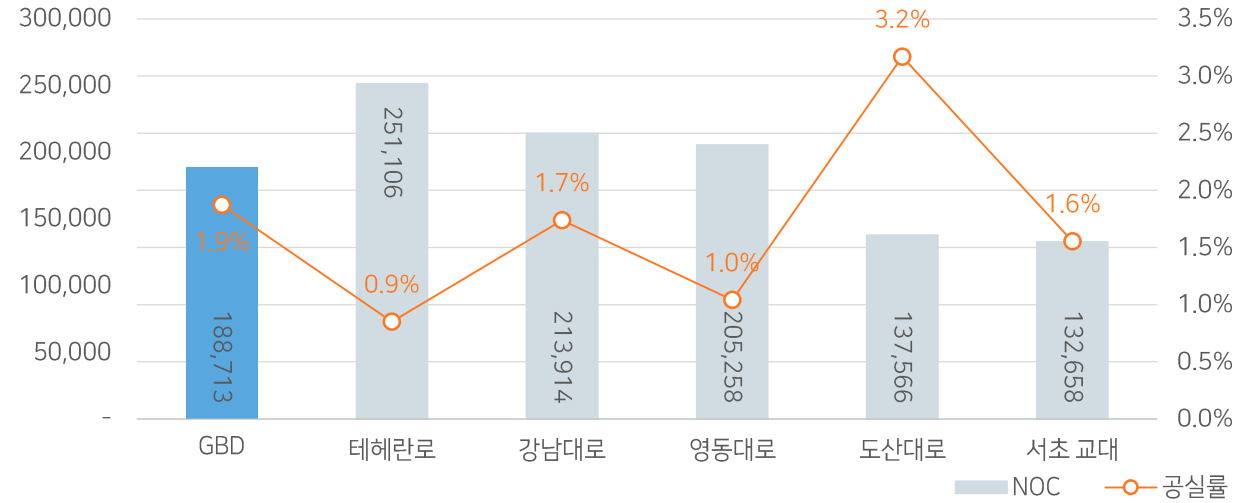
■ CBD 지역 규모 별 공실률 / NOC

# 73 GBD 강남권역

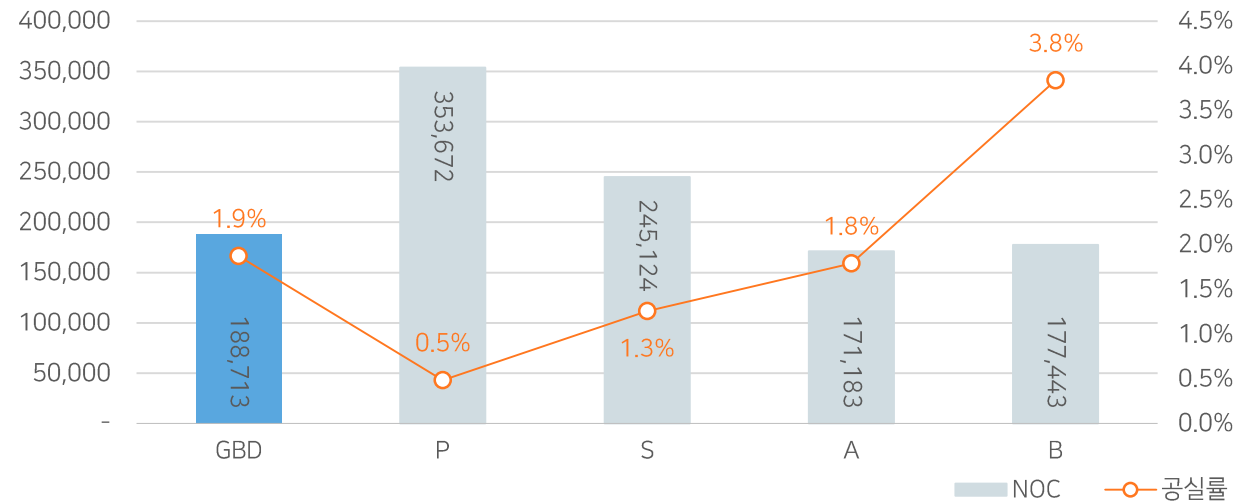
공실률 1.87% ↓ 평균 NOC ₩ 188,713 ↑

평균 임대료	평균 보증금	평균 관리비
85,835	1,209,037	26,982

2022년도 1월 조사한 강남지역 오피스의 평균 공실률은 1.87%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 188,713원으로 조사되었다.



■ GBD 지역 세부권역별 공실률/NOC



■ GBD 지역 규모 별 공실률/NOC

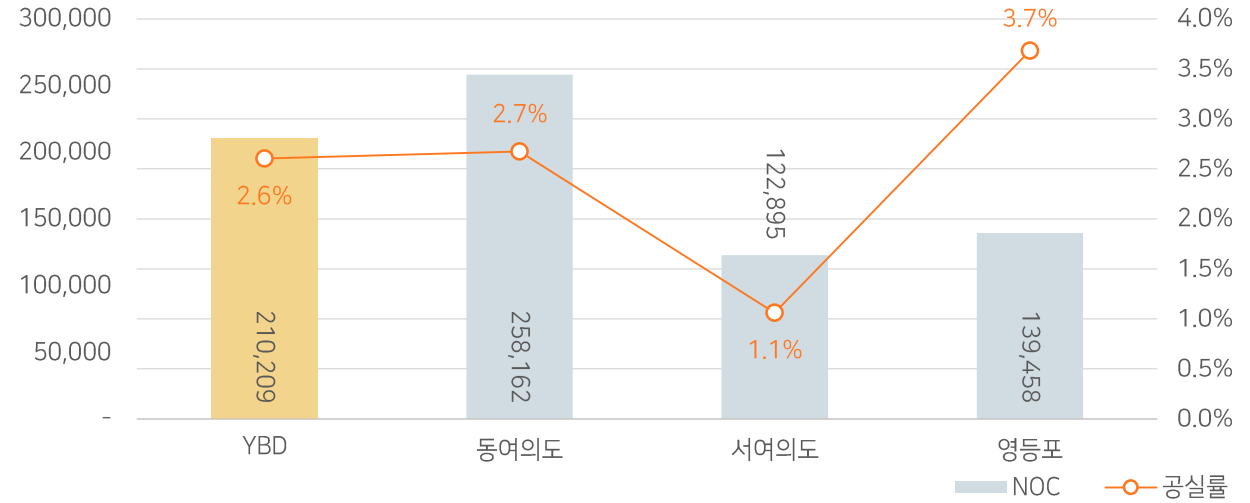
# 24 YBD 여의도, 영등포 권역

공실률  
2.60% ↓

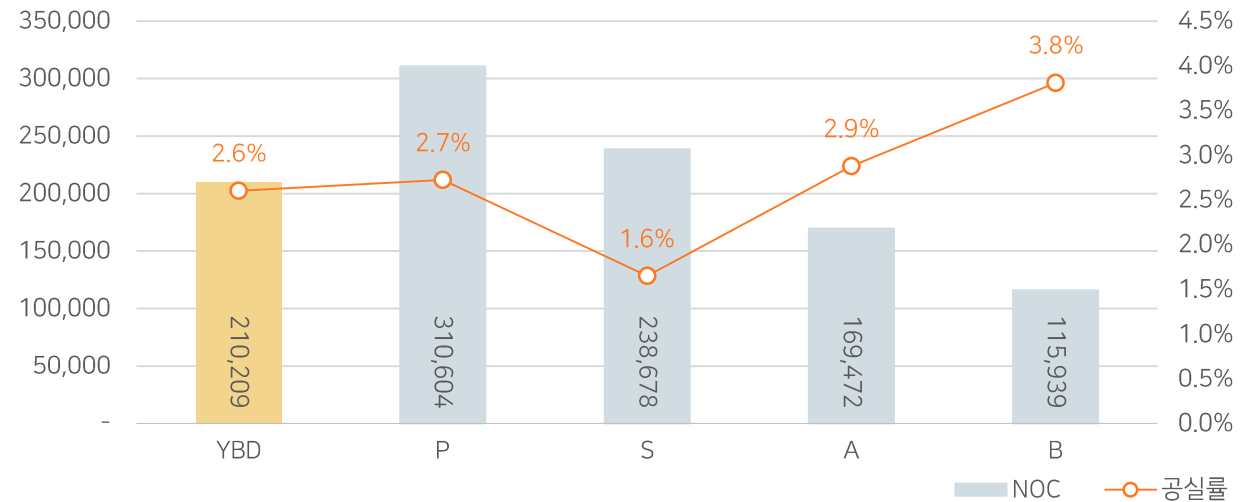
평균 NOC  
₩ 210,209 ↓

평균 임대료	평균 보증금	평균 관리비
79,506	816,468	33,261

2022년도 1월 조사한 여의도, 영등포 지역  
오피스의 평균 공실률은 2.60%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 210,209원으로 조사되었다.



■ YBD 지역세부권역별 공실률/NOC



■ YBD 지역규모 별 공실률/NOC



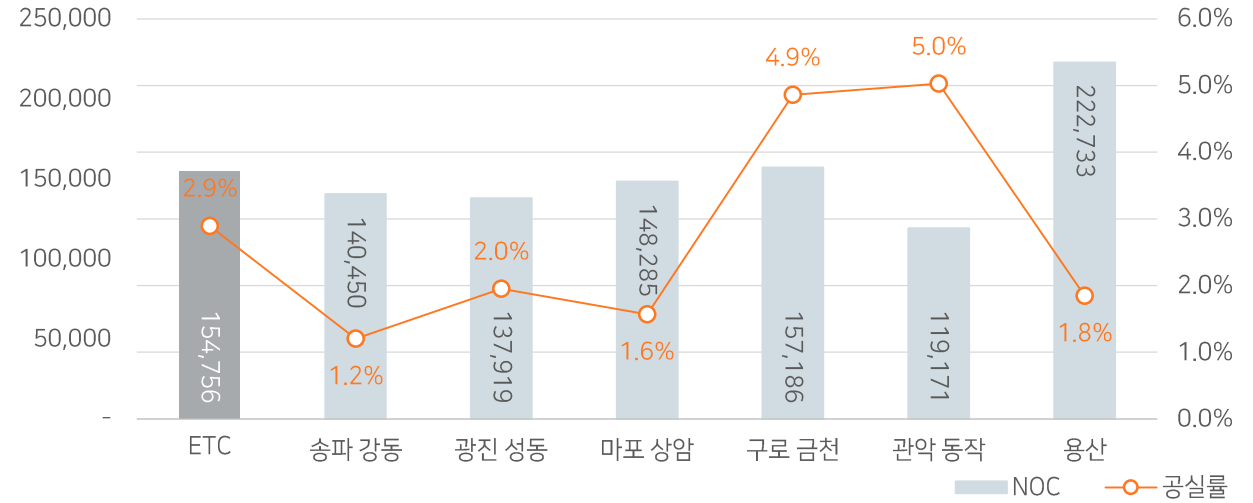
# 75 ETC 서울 기타권역

공실률  
2.89% ↑

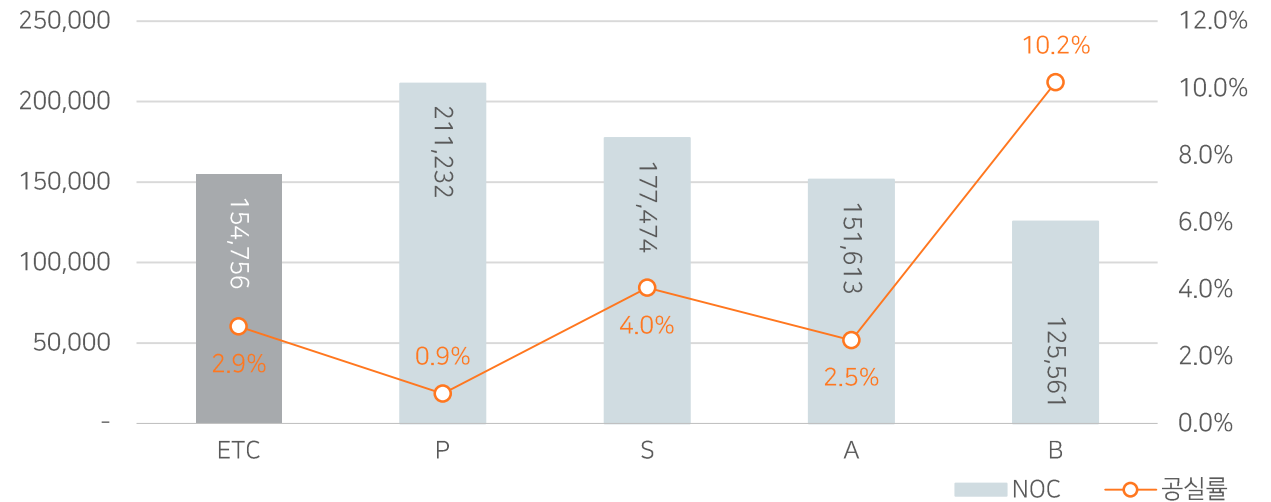
평균 NOC  
₩ 154,756 ↑

평균 임대료	평균 보증금	평균 관리비
59,403	689,368	22,097

2022년도 1월 조사한 서울 기타지역 오피스의  
평균 공실률은 2.89%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 154,756원으로 조사되었다.



ETC 지역 세부권역별 공실률/NOC



ETC 지역 규모별 공실률/NOC

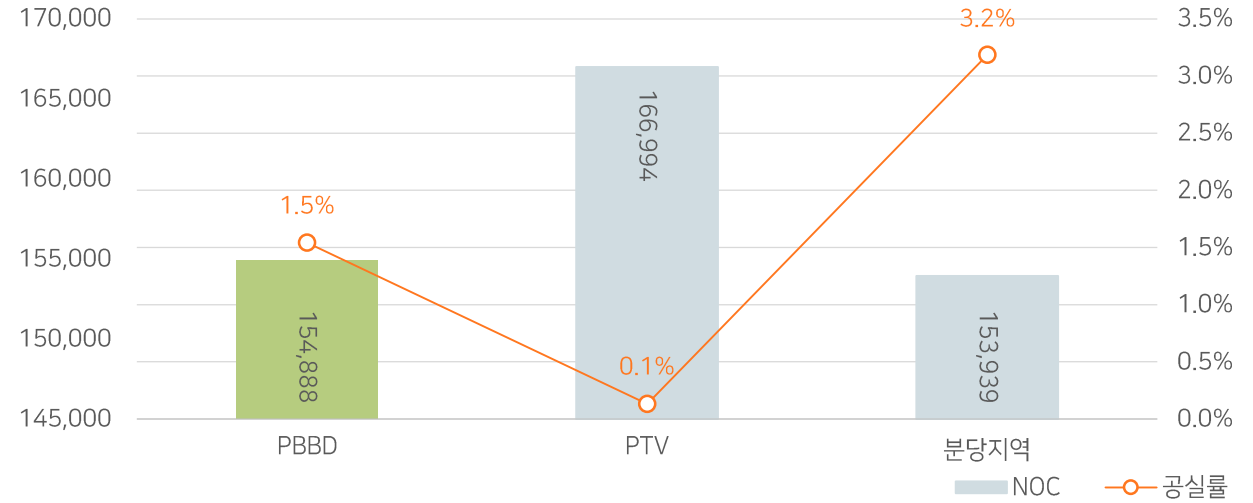
# 76 PBBD 판교, 분당 권역

공실률  
1.54% ↓

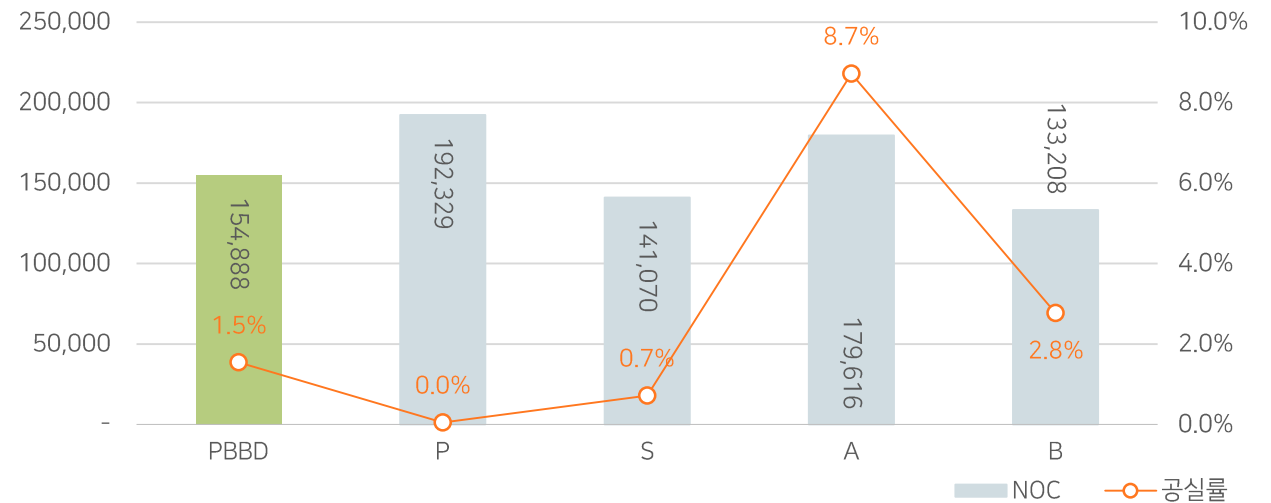
평균 NOC  
₩ 154,888 ↑

평균 임대료	평균 보증금	평균 관리비
55,912	674,783	25,435

2022년도 1월 조사한 판교, 분당지역 오피스의  
평균 공실률은 1.54%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 154,888원으로 조사되었다.



■ PBBD 지역 세부권역 별 공실률 / NOC



■ PBBD 지역 규모 별 공실률 / NOC

# 세부 지역 별 임대 현황

구역	세부구역	총임대면적	평균보증금	평균임대료	평균관리비	평균NOC	공실률
CBD	광화문역	281,068	1,031,016	104,210	37,614	244,257	6.16%
	시청역	279,816	675,096	70,190	31,819	170,122	3.62%
	종각역	322,024	881,248	90,883	38,175	239,841	3.20%
	을지로입구역	251,650	813,053	85,412	36,711	204,306	7.16%
GBD	테헤란로	1,007,636	1,195,563	99,374	35,298	251,106	0.85%
	강남대로	509,206	1,282,069	97,189	29,174	213,914	1.74%
	영동대로	201,377	820,880	77,965	24,975	205,258	1.04%
	도산대로	92,970	1,091,867	70,500	27,221	137,566	3.17%
	서초 교대	132,348	1,035,649	60,632	24,189	132,658	1.55%
YBD	동여의도	903,480	923,866	91,969	38,231	258,162	2.67%
	서여의도	170,229	483,814	48,605	29,092	122,895	1.06%
	영등포	182,957	753,984	66,862	20,392	139,458	3.68%
ETC	송파 강동	659,269	802,368	60,043	21,018	140,450	1.20%
	광진 성동	151,905	905,531	67,177	20,625	137,919	1.95%
	마포 상암	641,060	564,535	52,864	27,187	148,285	1.57%
	구로 금천	266,699	614,157	58,121	14,383	157,186	4.86%
	관악 동작	188,404	851,253	49,096	17,291	119,171	5.03%
	용산	410,434	954,547	89,902	34,093	222,733	1.85%
PBBD	PTV	354,231	674,581	58,093	20,375	166,994	0.13%
	분당지역	304,176	674,799	55,741	25,875	153,939	3.19%

## 지역 별 사용승인 현황

권역	빌딩명	소재지	주용도	연면적(㎡)	연면적(3.3㎡)	사용승인일
CBD	신당동 신축	중구 신당동	업무시설	1,979	599	24-Dec
GBD	Raffine	강남구 신사동	제2종근린생활시설	2,149	650	03-Dec
	카프리 정비공장	강남구 율현동	자동차관련시설	1,353	409	16-Dec
	우광빌딩	서초구 양재동	제1종근린생활시설	1,137	344	15-Dec
	데시앙플렉스	강서구 등촌동	공장	46,774	14,149	10-Dec
ETC	메이플레이스	강서구 마곡동	업무시설	24,644	7,455	23-Dec
	상원이엔씨	강서구 마곡동	교육연구시설	11,335	3,429	03-Dec
	더시티프라자	송파구 석촌동	제1종근린생활시설	3,548	1,073	17-Dec
	금강프라임 빌딩	용산구 원효로3가	업무시설	3,217	973	27-Dec
	범서빌딩	마포구 서교동	제2종근린생활시설	1,889	571	31-Dec
	삼형전자	구로구 고척동	공장	1,648	498	16-Dec
	그랜드빌딩	관악구 신림동	제1종근린생활시설	1,624	491	17-Dec
	에이빌딩	동대문구 답십리동	제2종근린생활시설	1,264	382	27-Dec
	D-LAB	성남시 분당구	제2종근린생활시설	1,162	351	20-Dec
PBBD						

## 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, January 2022
DB Mangement	Okey Research Center has carried out our research with a large number 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 = 1,197.80 KRW (0.83 USD = 1,000 KRW) as at 8th February 2022

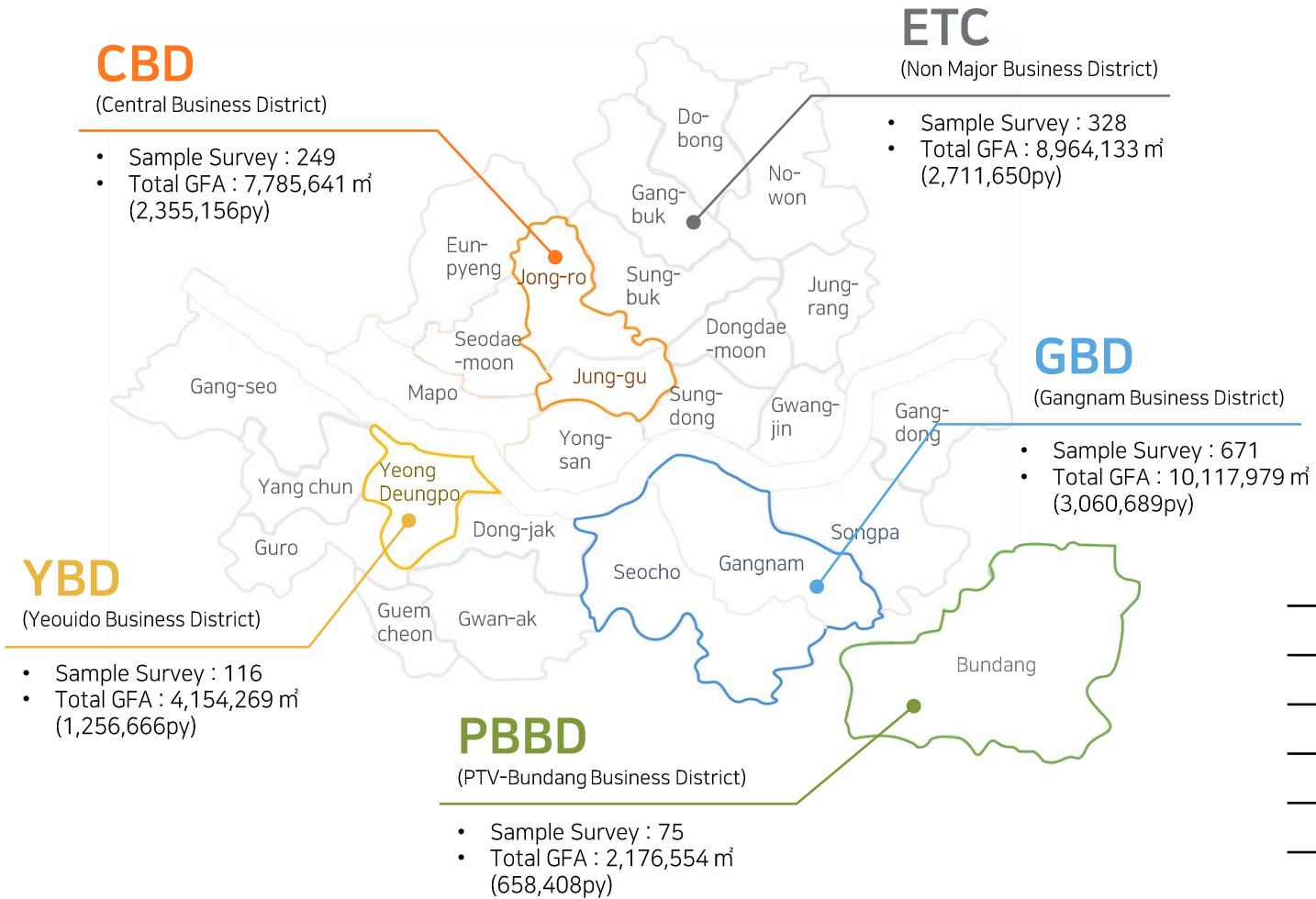
## 5 Regional Divisions in Seoul

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 1,439

	P	S	A	B
CBD	45	70	36	98
GBD	28	86	93	464
YBD	20	24	32	40
ETC	49	61	66	152
PBSD	11	18	15	31

### • 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

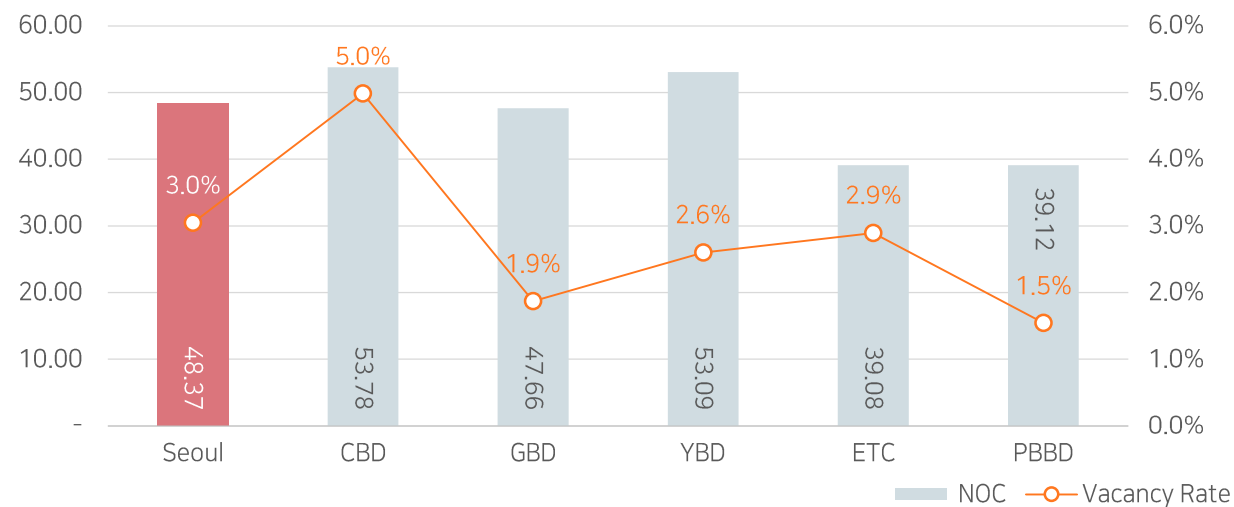
3.05% ↓

Avg, NOC

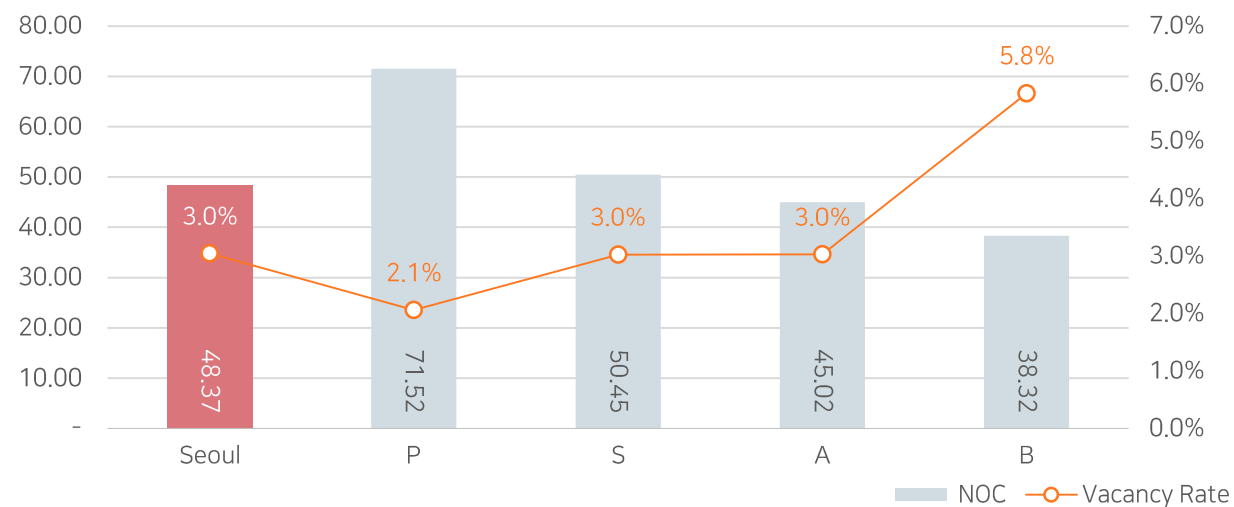
\$ 48.37 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
19.85	221.68	7.60

The average vacancy rate of the office buildings in Seoul is 3.05 % as at January 2022, and the average NOC is \$ 48.37.



■ Vacancy Rate & NOC in Seoul and Each District



■ Vacancy Rate & NOC in Seoul & Each Building Category

# 01 SBD Seoul Capital Area

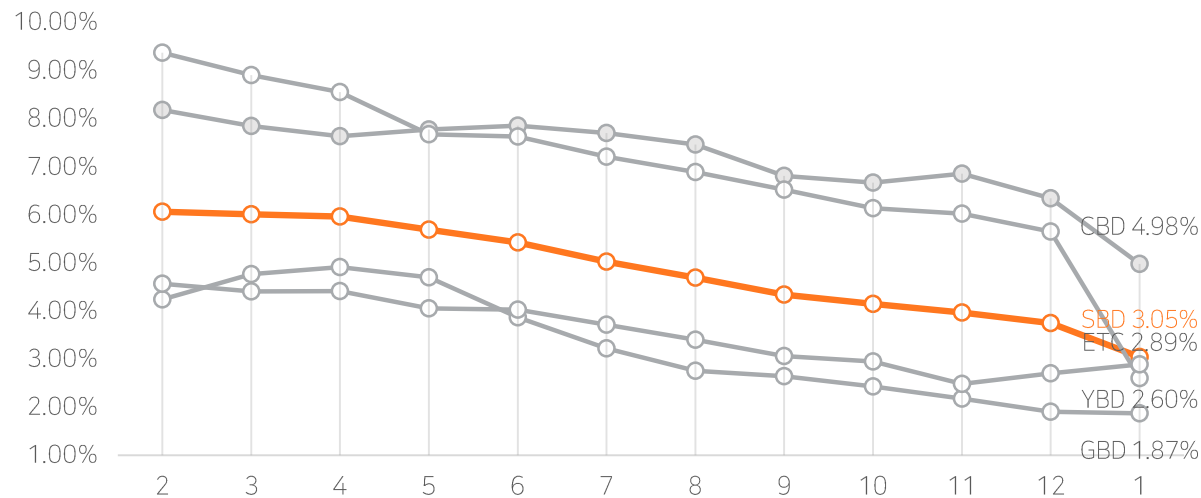
The following charts next indicate the vacancy level of Seoul for January 2022.

In Grand Central Building in CBD, Hyundai Capital, Korea Inclusive Finance Agency and POSCO International moved in as new tenants renting the 19 floors in total; 1) Hyundai Capital for 11 floors, 2) Korea Inclusive Finance Agency for 5 floors and 3) POSCO International for 3 floors. The 3 new tenants are using the leasing area of 42,130m<sup>2</sup> all together. Jipyong LLC also signed the lease agreement with Grand Central Building in the mid last year, 2021, and just moved into the leasing area of 12,590m<sup>2</sup> on the 6 floors in the building.

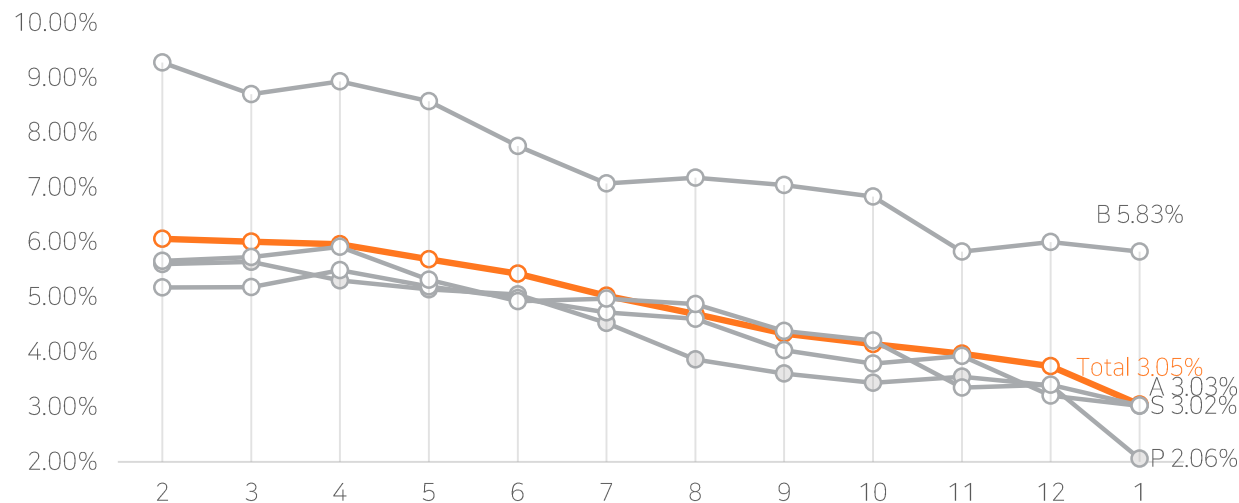
In Centerfield in GBD, the global IT firms moved into the leasing area of 7,320m<sup>2</sup> on the 2 floors and NPIXEL Corp., which had signed the lease agreement in the mid last year, 2021, also moved in renting 10,980m<sup>2</sup> on the 3 floors in the building.

In Parc1 Tower 1 in YBD, HMM and other tenants began to rent the 15 floors of 51,460m<sup>2</sup> in total; HMM alone rented the 9 out of the 15 floors in the tower.

In TCC Steel Office Building, CBRE, Red Pen Corp. and other tenants moved in as new tenants renting 8,160m<sup>2</sup> in total; CBRE and Red Pen Corp. occupying the 3 floors and the 1 floor, respectively, in the building. On the other hand, Daelim B&Co signed the lease agreement with Jaeil Building in YBD, to rent the leasing area of 5,270m<sup>2</sup> on the 5 floors.



Monthly Vacancy Rate in 5 Main Districts



Monthly Vacancy Rate for Different Size of Buildings

# 02 CBD Central Seoul

Vacancy rate

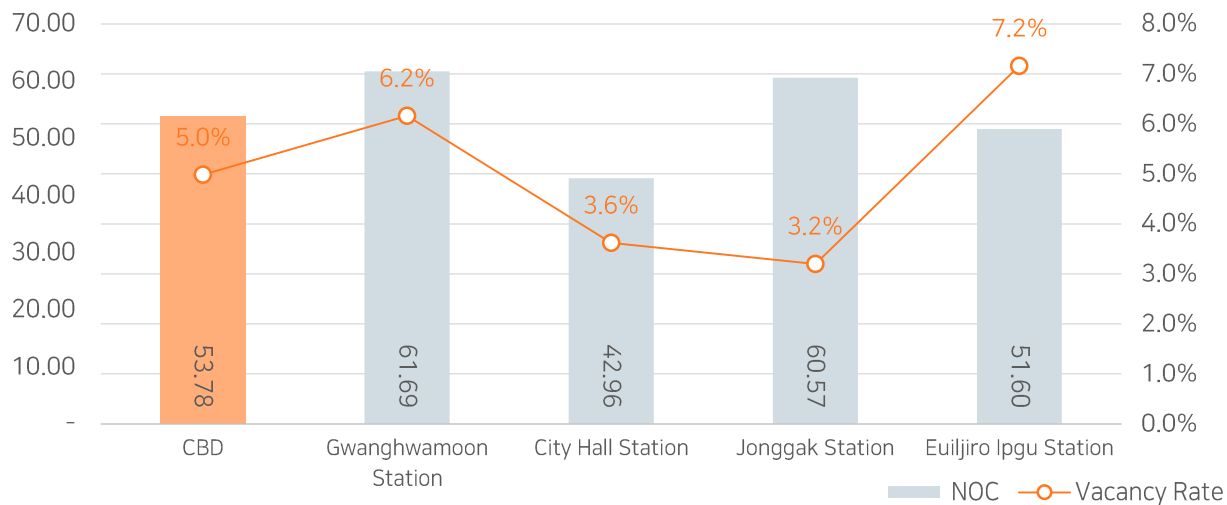
4.98 % ↓

Avg, NOC

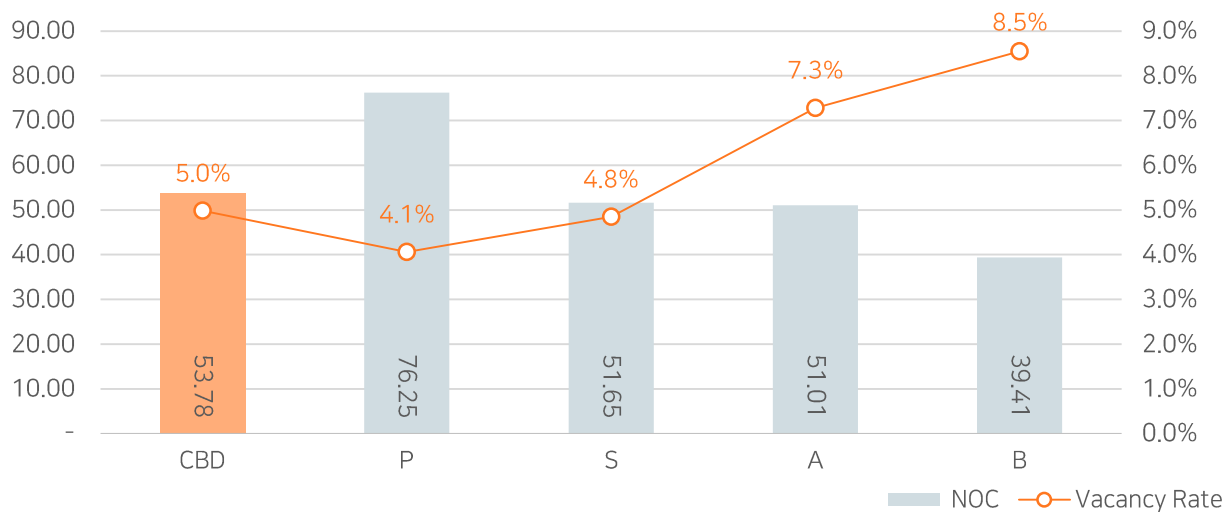
\$ 53.78 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
22.15	221.83	9.06

The average vacancy rate of the office buildings in CBD is 4.98 % as at January 2022, and the average NOC is \$ 53.78.



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



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

# GBD Gangnam

Vacancy rate

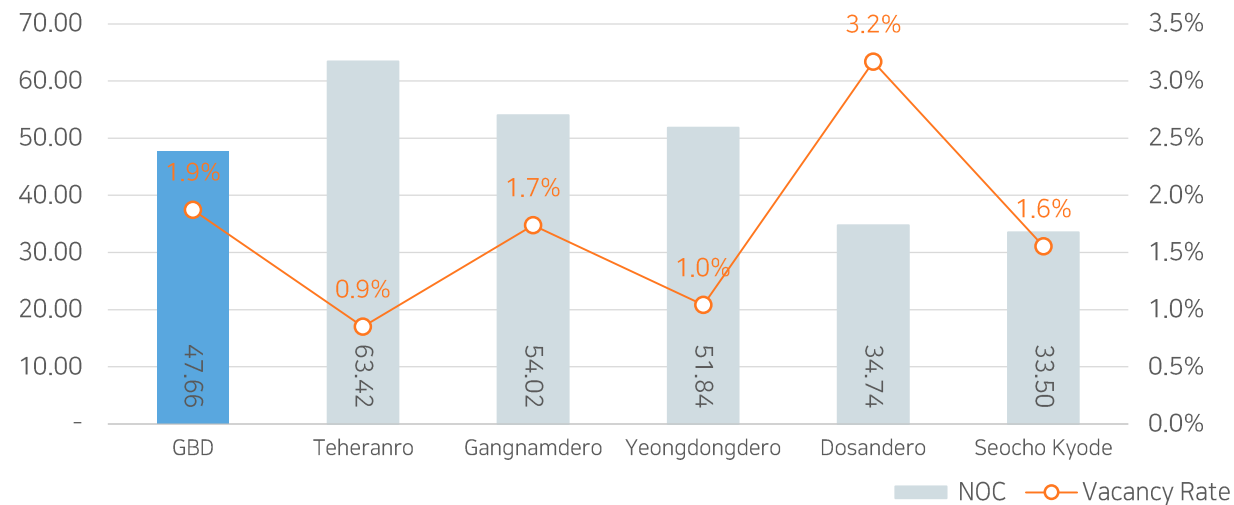
1.87% ↓

Avg, NOC

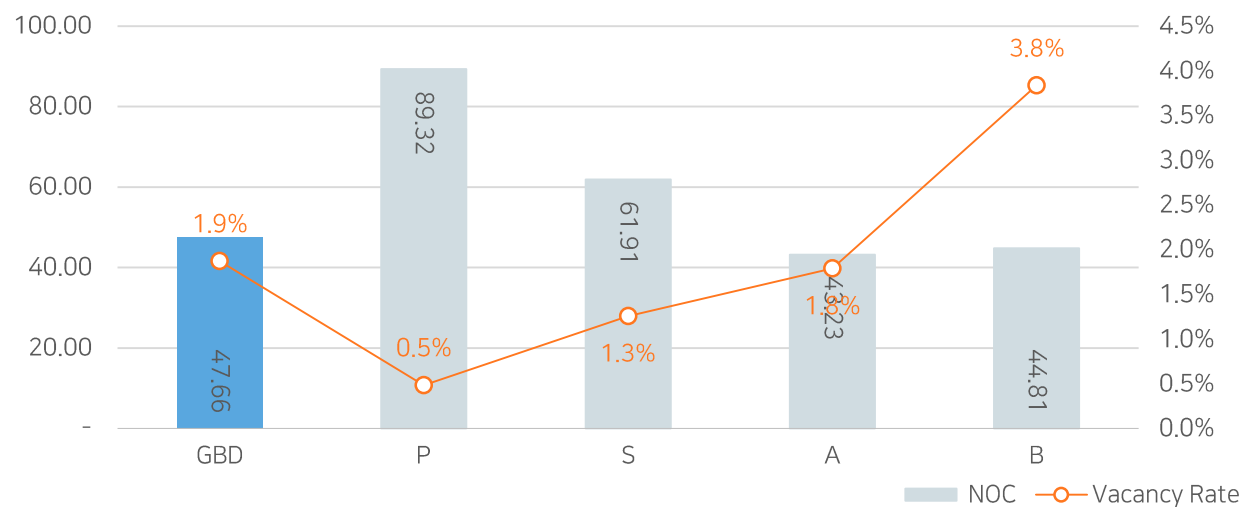
\$ 47.66 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
21.68	305.34	6.81

The average vacancy rate of the office buildings in GBD is 1.87 % as at January 2022, and the average NOC is \$ 47.66.



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



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

# 24 YBD Yeouido & Yeongdeungpo

Vacancy rate

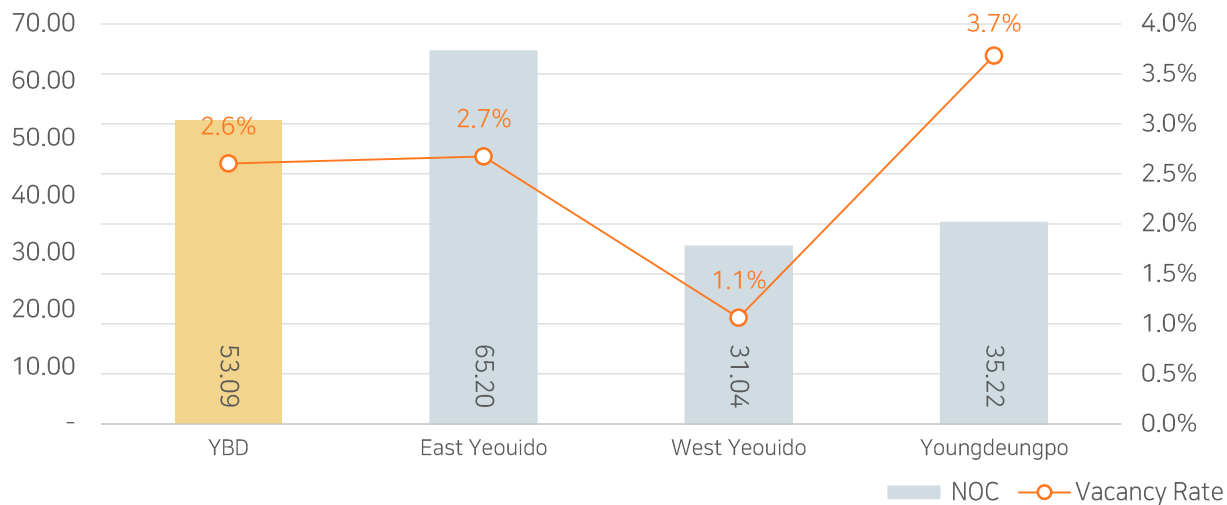
2.60 % ↓

Avg, NOC

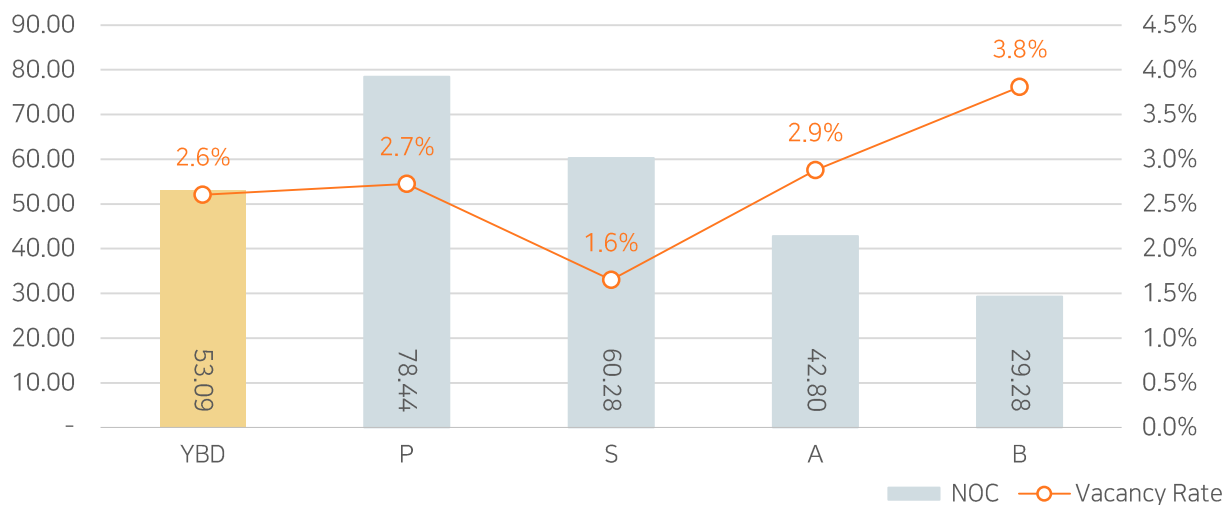
\$ 53.09 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
20.08	206.20	8.40

The average vacancy rate of the office buildings in YBD is 2.60 % as at January 2022, and the average NOC is \$ 53.09.



■ 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

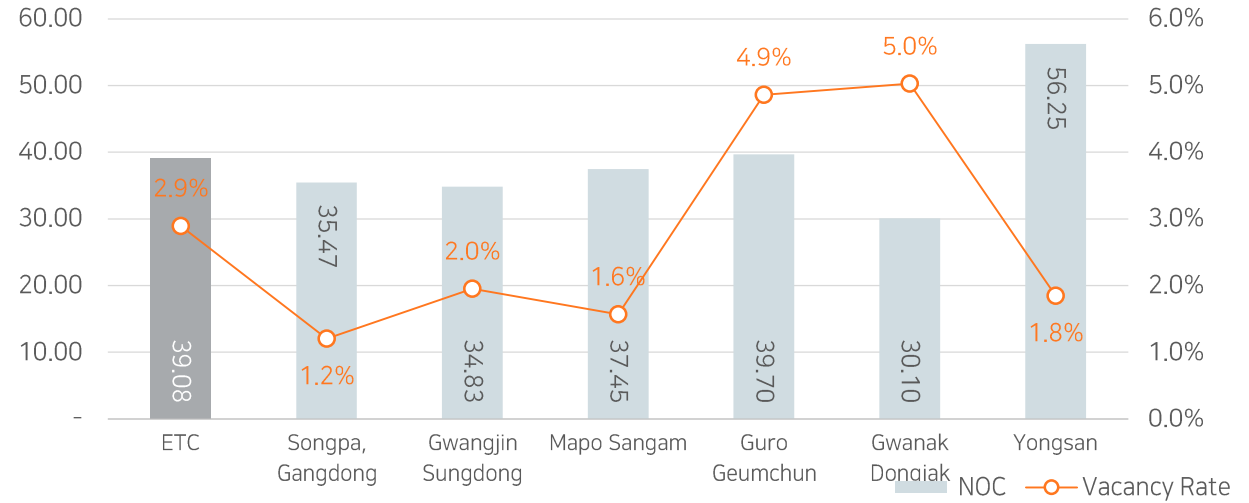
2.89% ↑

Avg, NOC

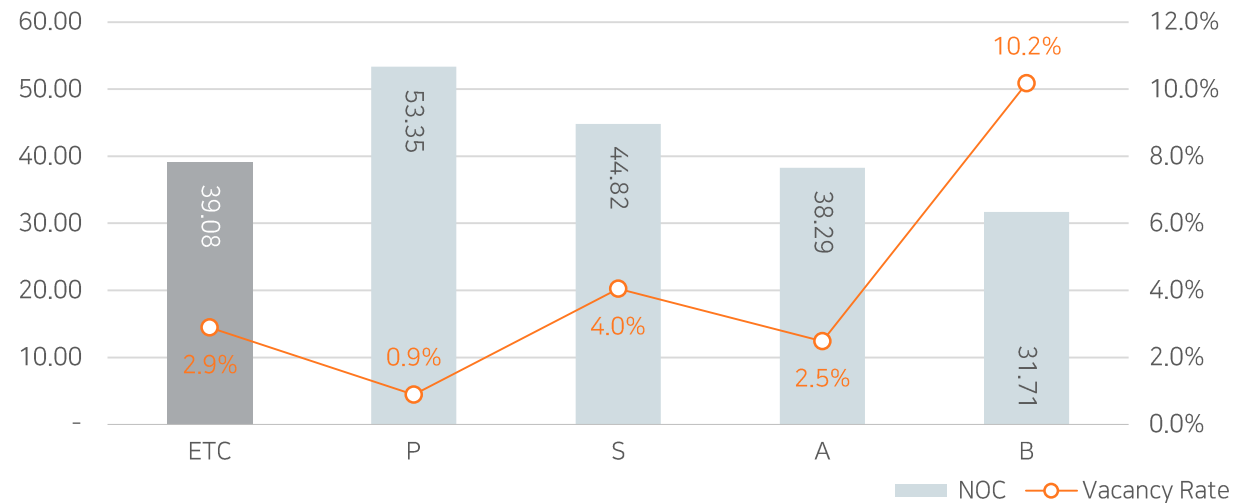
\$ 39.08 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
15.00	174.10	5.58

The average vacancy rate of the office buildings in ETC is 2.89 % as at January 2022, and the average NOC is \$ 39.08.



■ 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

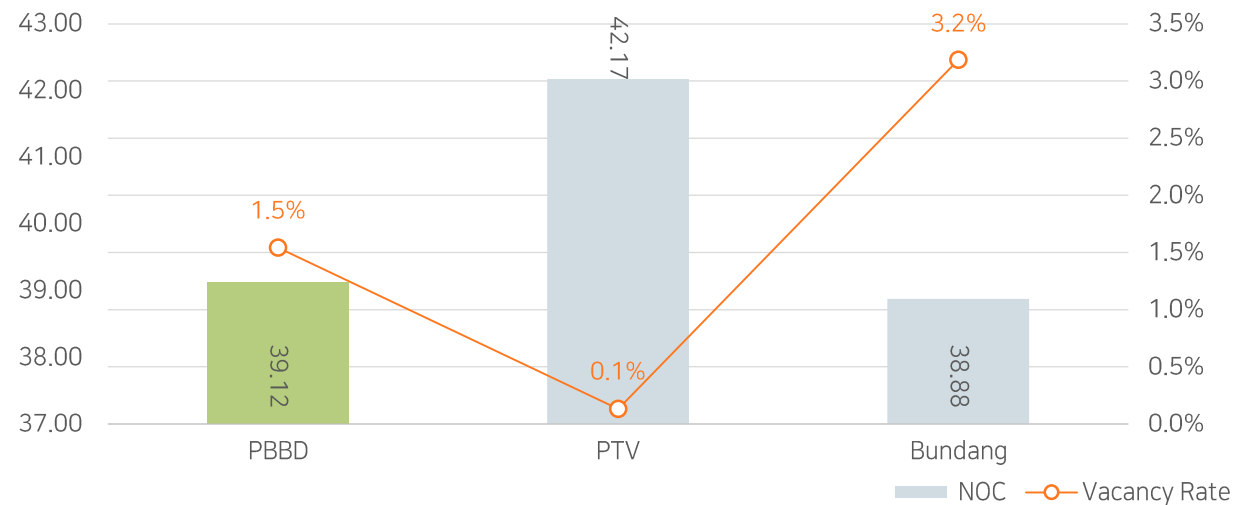
1.54 % ↓

Avg, NOC

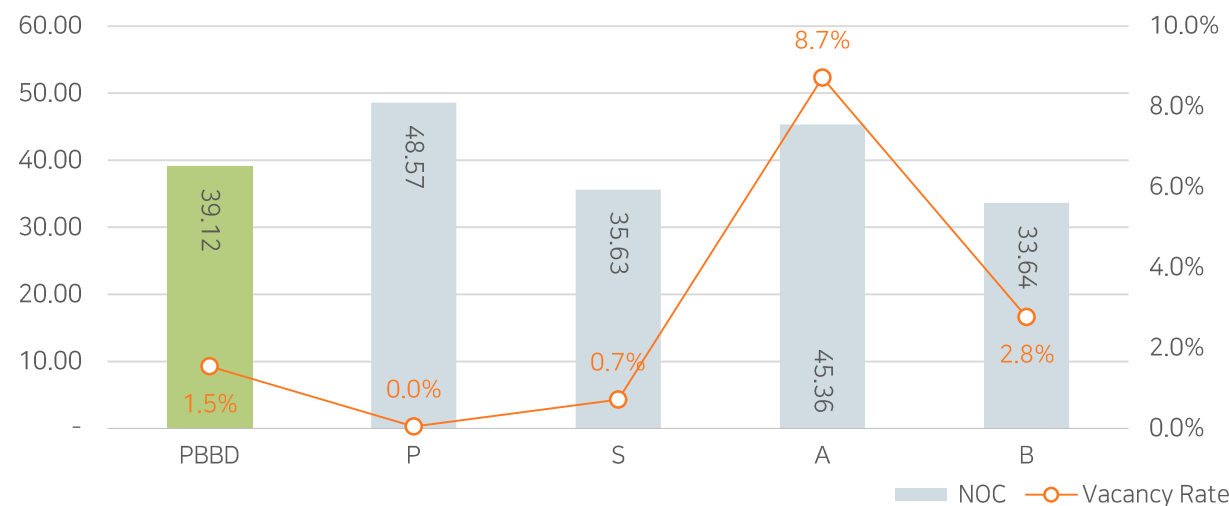
\$ 39.12 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
14.12	170.41	6.42

The average vacancy rate of the office buildings in PBBD is 1.54 % as at January 2022, and the average NOC is \$ 39.12.



■ 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	929,151	260.38	26.32	9.50	61.69	6.16%
	City Hall Station	925,013	170.49	17.73	8.04	42.96	3.62%
	Jonggak Station	1,064,541	222.56	22.95	9.64	60.57	3.20%
	Euiljiro Ipgu Station	831,901	205.33	21.57	9.27	51.60	7.16%
GBD	Teheranro	3,331,028	301.93	25.10	8.91	63.42	0.85%
	Gangnamdero	1,683,324	323.78	24.54	7.37	54.02	1.74%
	Yeongdongdero	665,710	207.31	19.69	6.31	51.84	1.04%
	Dosandero	307,338	275.75	17.80	6.87	34.74	3.17%
	Seocho Gyodae	437,513	261.55	15.31	6.11	33.50	1.55%
YBD	East Yeouido	2,986,711	233.32	23.23	9.66	65.20	2.67%
	West Yeouido	562,740	122.19	12.27	7.35	31.04	1.06%
	Youngdeungpo	604,817	190.42	16.89	5.15	35.22	3.68%
ETC	Songpa, Gangdong	2,179,402	202.64	15.16	5.31	35.47	1.20%
	Gwangjin Sungdong	502,166	228.69	16.97	5.21	34.83	1.95%
	Mapo Sangam	2,119,208	142.57	13.35	6.87	37.45	1.57%
	Guro Geumchun	881,649	155.10	14.68	3.63	39.70	4.86%
	Gwanak Dongjak	622,824	214.98	12.40	4.37	30.10	5.03%
	Yongsan	1,356,808	241.07	22.70	8.61	56.25	1.85%
PBBD	PTV	1,171,012	170.36	14.67	5.15	42.17	0.13%
	Bundang	1,005,542	170.42	14.08	6.53	38.88	3.19%



## Land Use Information by District

District	Building Name	Address	Land Use	GFA (㎡)	Completion
CBD	Shindangdong (Brand New)	Shindangdong Junggu	Office	1,979	24-Dec
	Raffine	Shinsadong Gangnamgu	#2 Commercial	2,149	03-Dec
GBD	Caffrey Service Center	Yulhyundong Gangnamgu	Automobile-related	1,353	16-Dec
	Woogwang Building	Yangjaedong Seochogu	#1 Commercial	1,137	15-Dec
ETC	Desian Plex	Deungchondong Gangseogu	Factory	46,774	10-Dec
	Mayplace	Magokdong Gangseogu	Office	24,644	23-Dec
	Sangwon EnC	Magokdong Gangseogu	Educational	11,335	03-Dec
	The City Plaza	Seokchondong Songpagu	#1 Commercial	3,548	17-Dec
	Keumgang Prime Building	Wonhyoro 3ga Yongsangu	Office	3,217	27-Dec
	Bumseo Building	Seogyodong Mapogu	#2 Commercial	1,889	31-Dec
	Samhyung Electronics	Gocheokdong Gurogu	Factory	1,648	16-Dec
	Grand Building	Shinlimdong Gwanakgu	#1 Commercial	1,624	17-Dec
PBBD	A Building	Dapshipridong Dongdaemoongu	#2 Commercial	1,264	27-Dec
	D-LAB	Bundanggu Seongnam-si	#2 Commercial	1,162	20-Dec



# OKEY Research Center

+82.2.6205.0884 okey@naikora.com www.okeyok.com

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Okey Corp. 10F Jungheon Building Teheranro 516, Gangnam-gu, Seoul

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