

# SEOUL OFFICE LEASING

January 2023 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 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

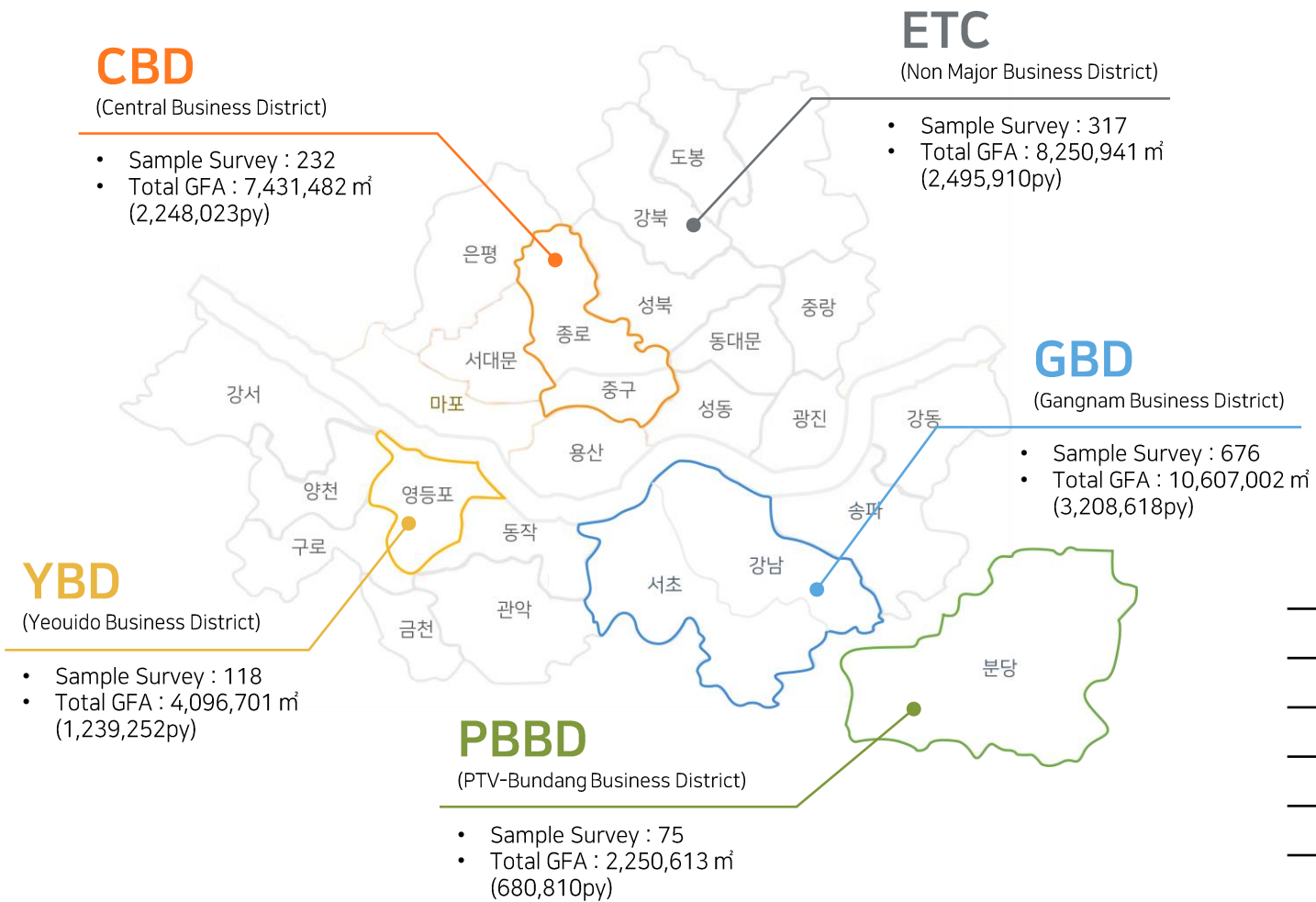
**여의도권**  
여의도, 영등포구 일대

**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 1,418

	P	S	A	B
CBD	45	65	33	89
GBD	33	82	93	468
YBD	20	24	33	41
ETC	46	61	55	155
PBBD	12	15	18	30

● 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

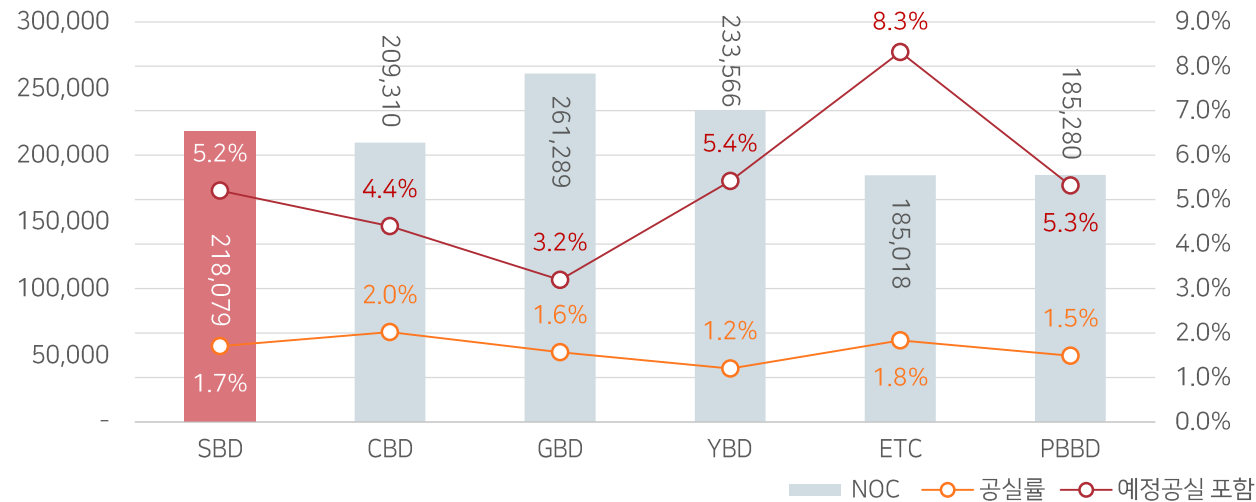
# 01 SBD 서울 전체

공실률  
1.70% ↓

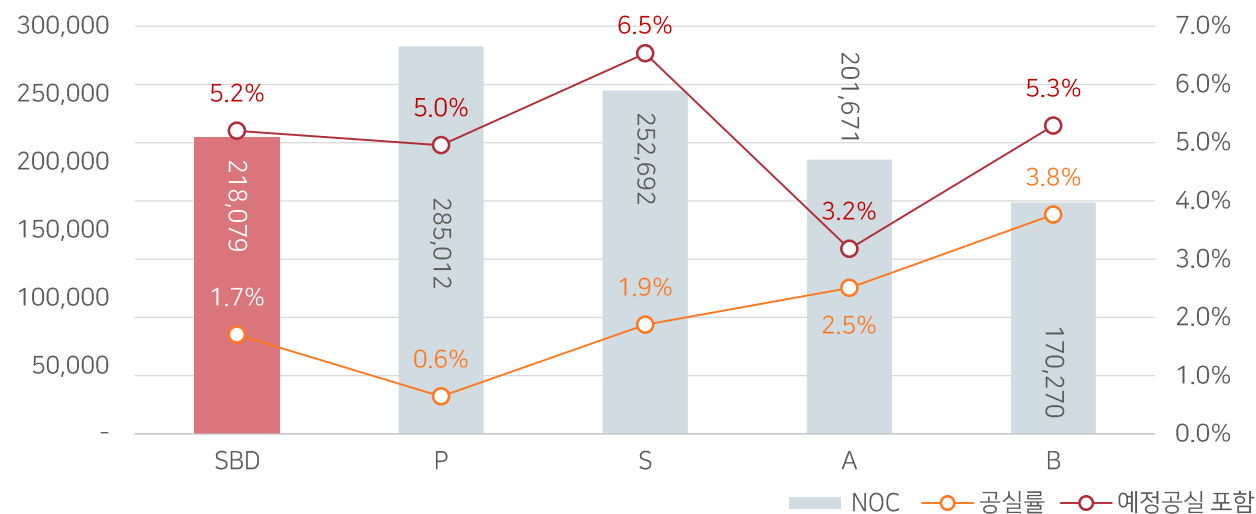
평균 NOC  
₩ 218,079 ↑

평균 임대료	평균 보증금	평균 관리비
91,830	1,005,868	33,237

2022년도 12월 조사한 서울지역 오피스의  
평균 공실률은 1.70%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 218,079원으로 조사되었다.



■ 서울 전체 권역 별 공실률 / NOC



■ 서울 전체 규모 별 공실률 / NOC



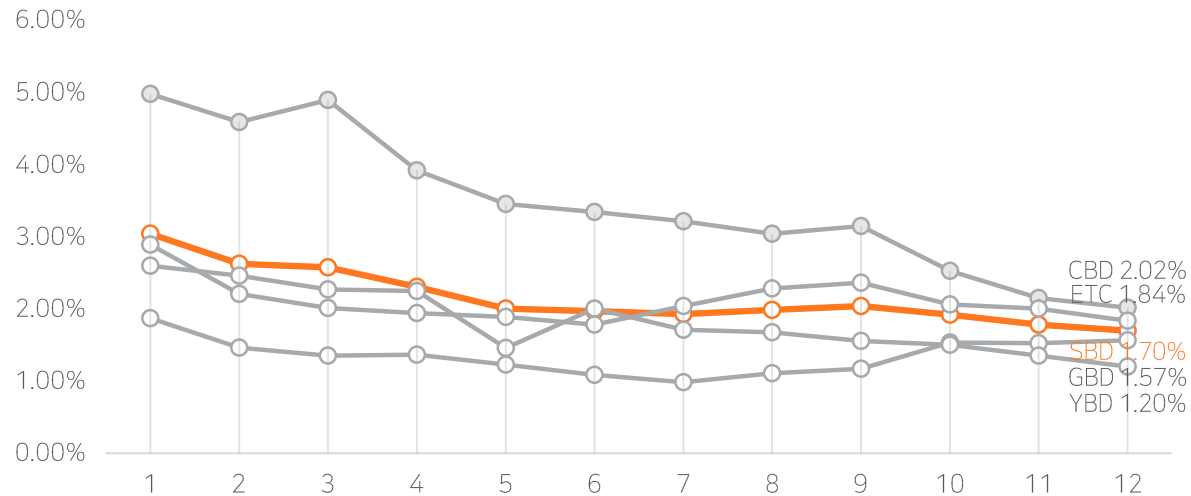
# 01 SBD 서울 전체

2022년 12월 서울권역의 공실률 흐름은 다음과 같이 조사되었다.

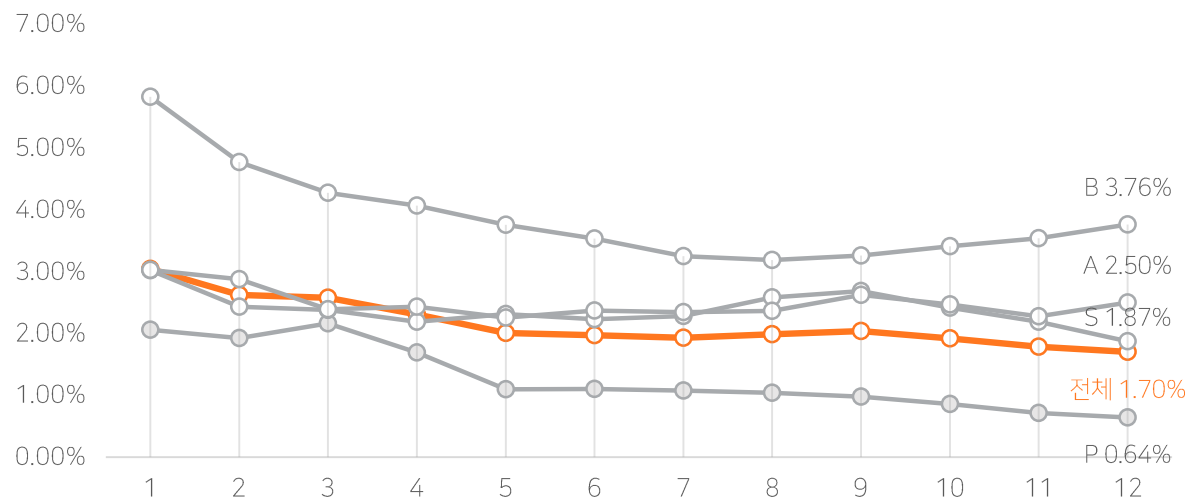
GBD의 JW타워가 매각되고 JW중외제약과 계열사의 과전이전이 결정되며 5,820평의 면적이 임대시장에 추가 되었으며, 동일타워에 혼다코리아, 법무법인대륜, 갈더마코리아, 사우스케이프, 하트스캔 등이 입주하며 총 3,710평의 공실이 해소되었다.

YBD의 파크원 NH금융타워에 라온시큐어가 2개층을 사용하며 1,940평의 공실이 해소되었다.

가산동의 잔카드림타워에 트랜비에서 독립한 한국정품감정센터가 3개층에 입주하는 등 총 6개층 3,240평의 공실이 해소되었고, 용산구 삼구빌딩에서는 대한의사협회와 산하의 협회들이 인근 사옥으로 이전하며 3개층 1290평의 공실이 임대시장에 추가되었다.



■ 서울 권역별 공실률 변화



■ 서울 규모별 공실률 변화

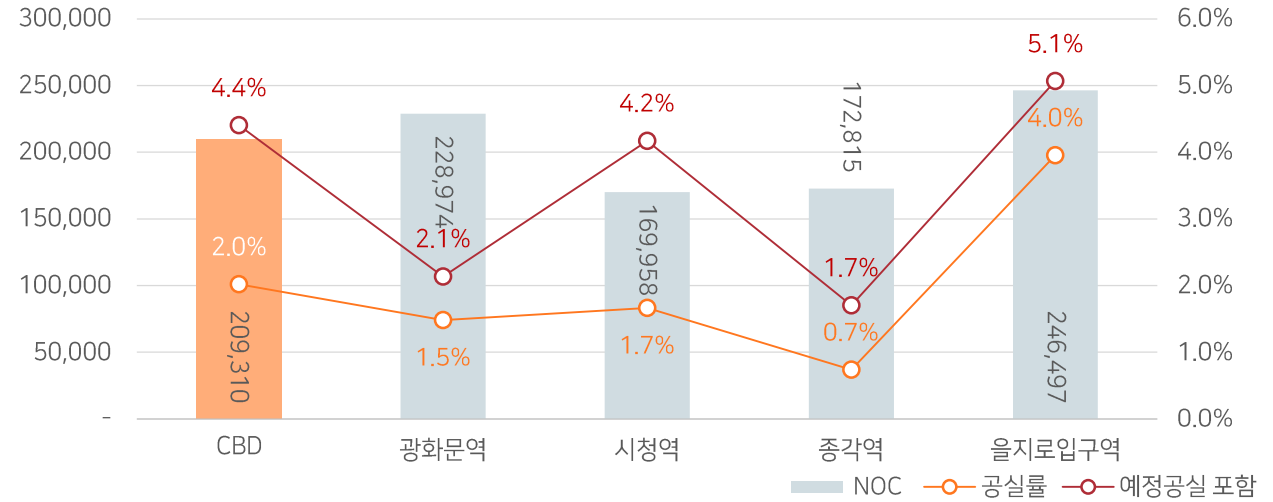
# 02 CBD 도심권역

공실률  
2.02% ↓

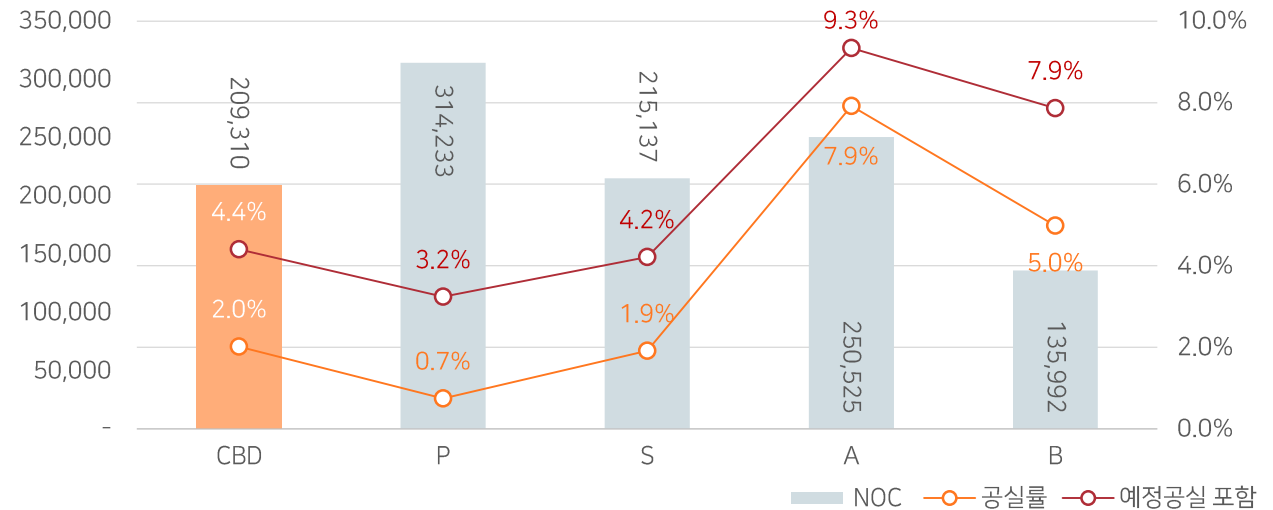
평균 NOC  
₩ 209,310 ↑

평균 임대료	평균 보증금	평균 관리비
89,241	922,758	36,411

2022년도 12월 조사한 도심지역 오피스의  
평균 공실률은 2.02%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 209,310원으로 조사되었다.



■ CBD 지역 세부권역별 공실률/NOC



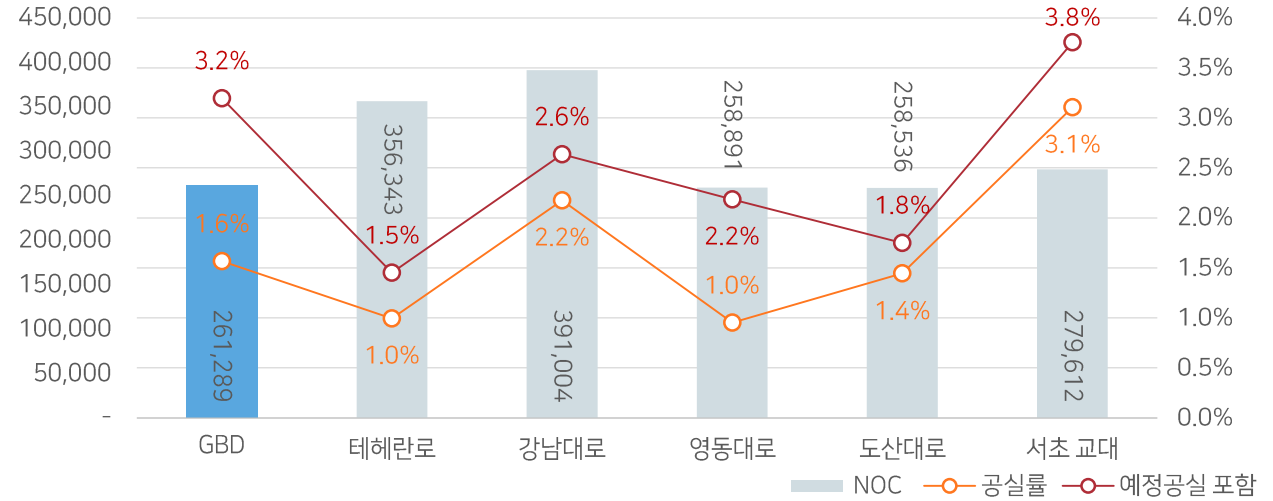
■ CBD 지역 규모별 공실률/NOC

# 73 GBD 강남권역

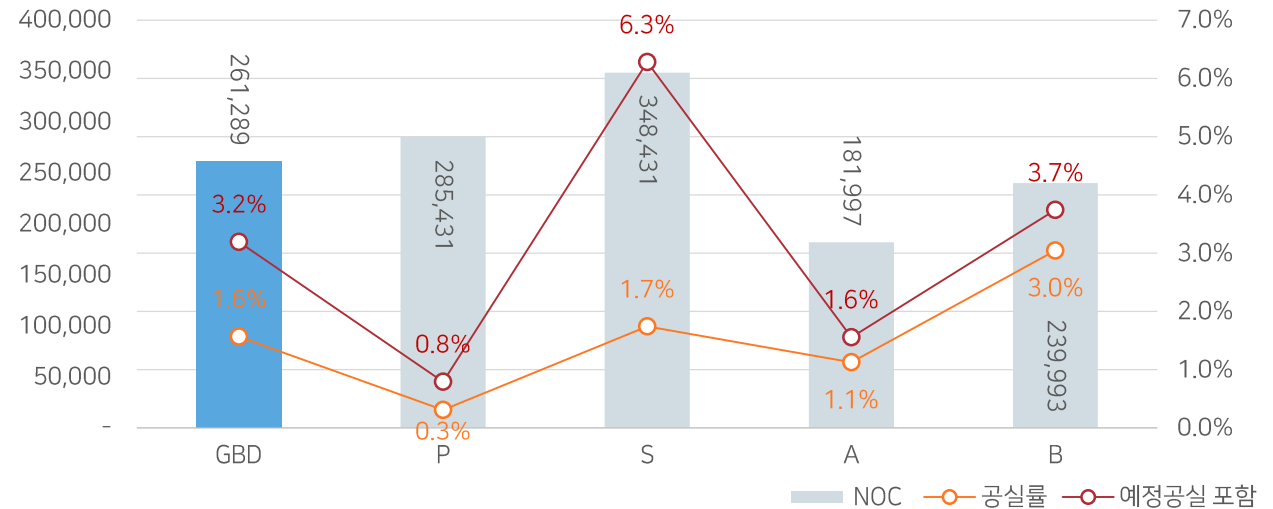
공실률 1.57% ↑ 평균 NOC ₩ 261,289 ↑

평균 임대료	평균 보증금	평균 관리비
120,786	1,436,770	32,757

2022년도 12월 조사한 강남지역 오피스의 평균 공실률은 1.57%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 261,289원으로 조사되었다.



■ GBD 지역 세부권역별 공실률/NOC



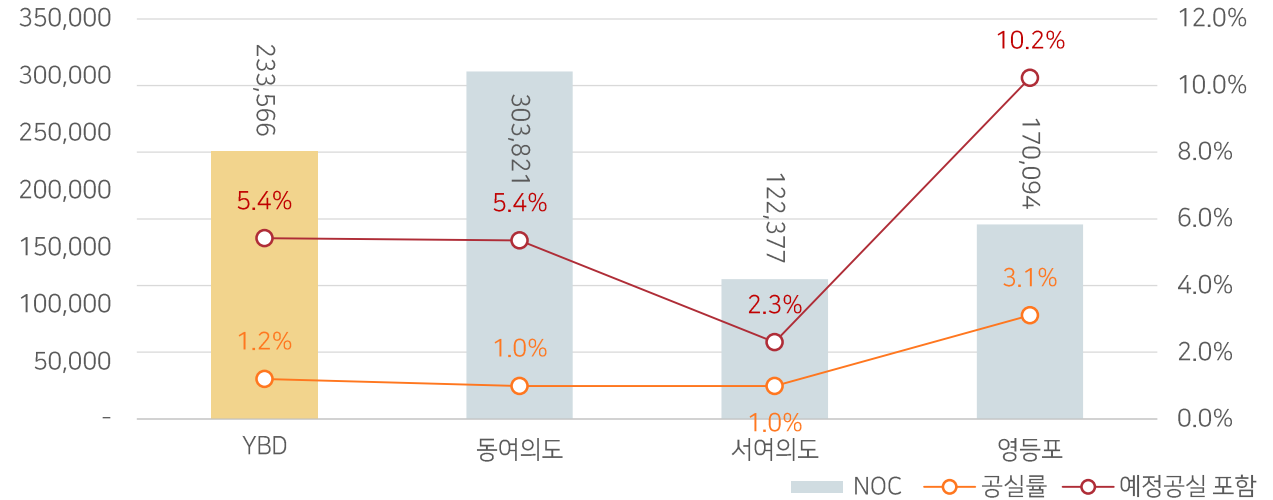
■ GBD 지역 규모 별 공실률/NOC

# 24 YBD 여의도, 영등포 권역

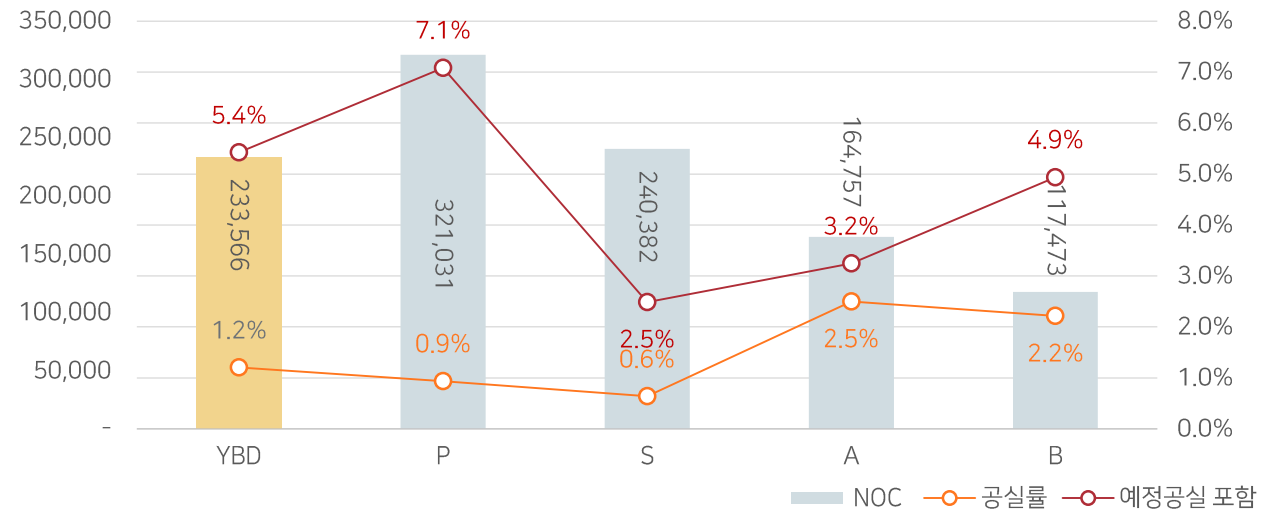
공실률 1.20% ↓  
평균 NOC ₩ 233,566 ↓

평균 임대료	평균 보증금	평균 관리비
89,430	919,612	36,950

2022년도 12월 조사한 여의도, 영등포 지역  
오피스의 평균 공실률은 1.20%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 233,566원으로 조사되었다.



■ YBD 지역세부권역별 공실률/NOC



■ YBD 지역규모 별 공실률/NOC



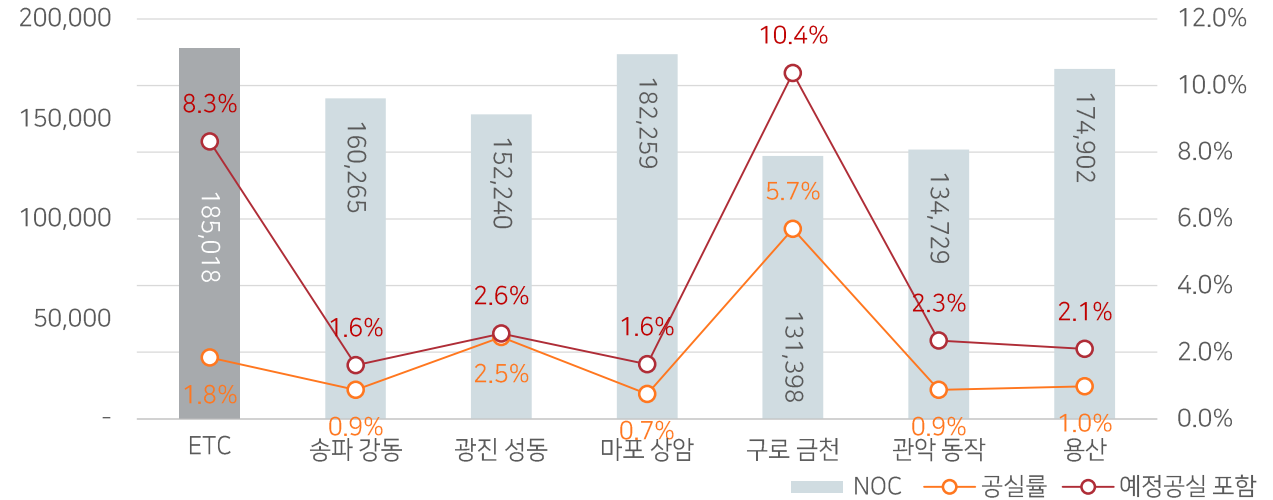
# 75 ETC 서울 기타권역

공실률  
1.84% ↓

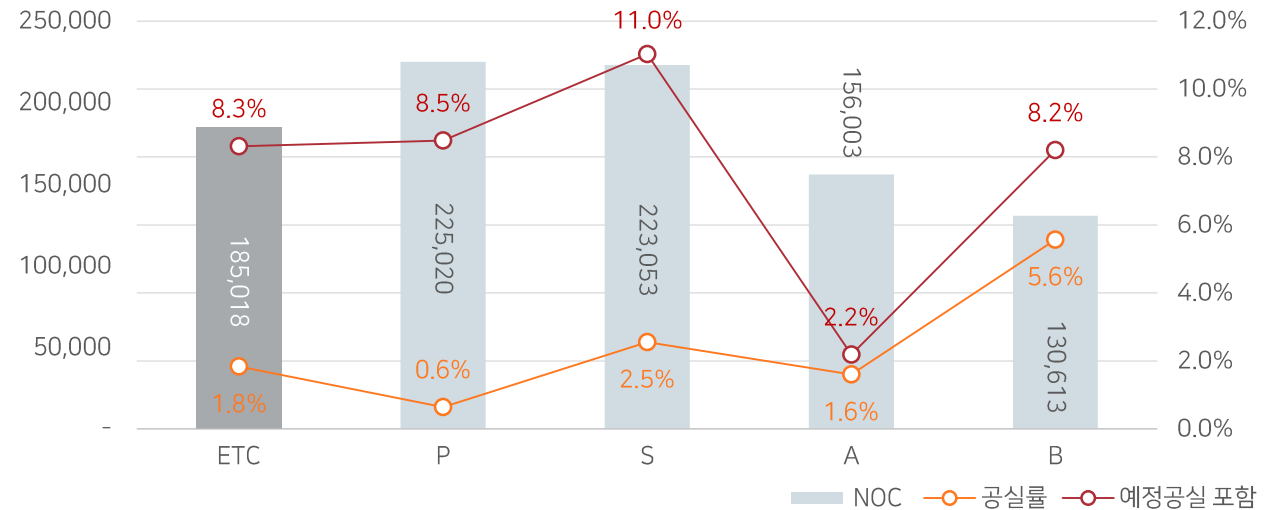
평균 NOC  
₩ 185,018 ↑

평균 임대료	평균 보증금	평균 관리비
71,260	775,779	27,913

2022년도 12월 조사한 서울 기타지역 오피스의  
평균 공실률은 1.84%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 185,018원으로 조사되었다.



ETC 지역 세부권역별 공실률/NOC



ETC 지역 규모별 공실률/NOC

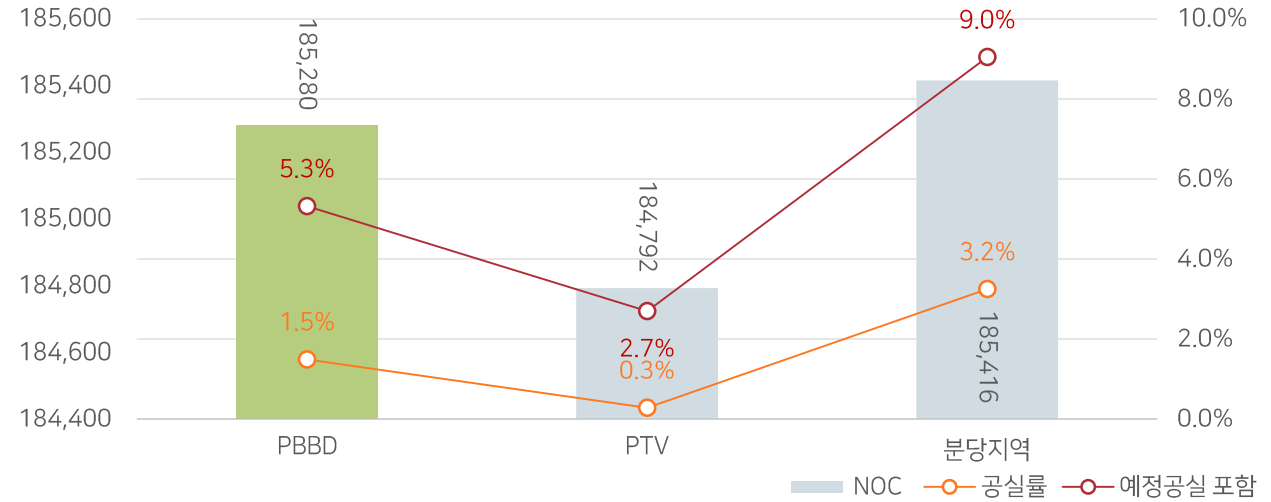
# 76 PBBD 판교, 분당 권역

공실률  
1.49% ↓

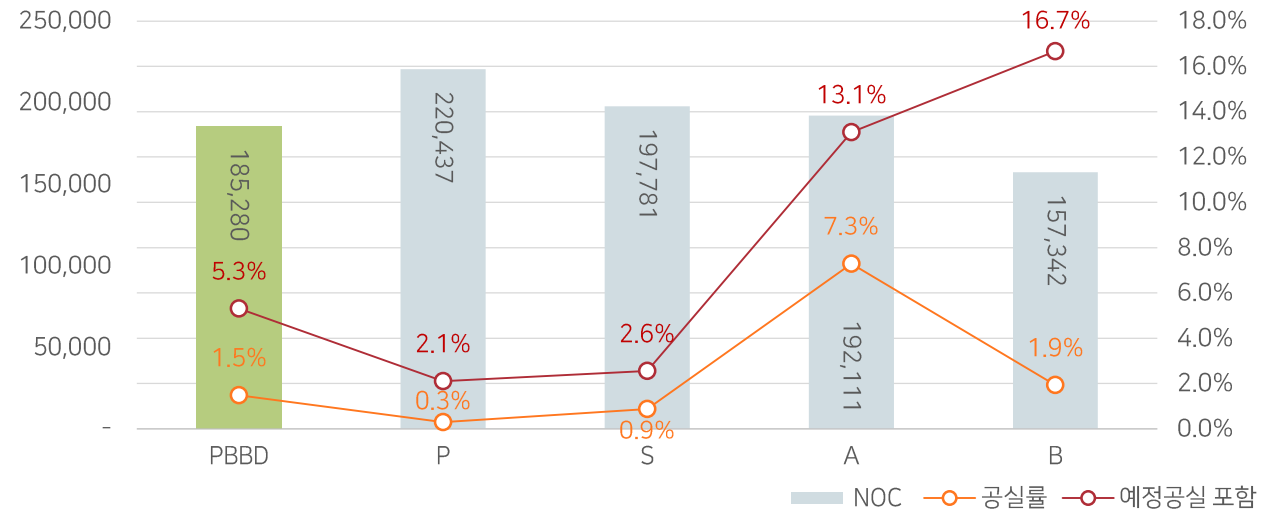
평균 NOC  
₩ 185,280 ↓

평균 임대료	평균 보증금	평균 관리비
75,876	914,934	30,640

2022년도 12월 조사한 판교, 분당지역 오피스의  
평균 공실률은 1.49%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 185,280원으로 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	263,874	966,728	100,752	36,351	228,974	1.48%
	시청역	288,406	774,712	75,642	35,704	169,958	1.66%
	종각역	293,399	739,798	72,598	32,297	172,815	0.74%
	을지로입구역	262,788	1,050,279	105,922	39,318	246,497	3.95%
GBD	테헤란로	1,103,363	1,976,049	180,661	37,586	356,343	1.00%
	강남대로	482,140	2,356,990	210,832	37,540	391,004	2.18%
	영동대로	280,696	870,794	82,925	35,182	258,891	0.95%
	도산대로	102,876	1,862,865	134,854	36,318	258,536	1.44%
	서초 교대	141,464	1,610,645	127,599	31,544	279,612	3.11%
YBD	동여의도	945,288	1,181,175	117,654	43,929	303,821	0.99%
	서여의도	169,883	468,315	44,002	25,847	122,377	0.99%
	영등포	124,081	719,397	64,667	30,104	170,094	3.11%
ETC	송파 강동	651,024	809,937	64,387	25,604	160,265	0.87%
	광진 성동	165,189	819,555	66,413	17,650	152,240	2.46%
	마포 상암	630,301	740,661	73,035	32,282	182,259	0.75%
	구로 금천	270,933	535,072	51,476	18,280	131,398	5.70%
	관악 동작	158,344	850,560	49,840	20,286	134,729	0.87%
	용산	227,348	726,205	57,236	31,800	174,902	0.98%
PBBD	PTV	403,541	737,850	71,399	26,750	184,792	0.28%
	분당지역	277,270	964,353	77,126	31,726	185,416	3.25%

# 지역 별 사용승인 현황

권역	빌딩명	소재지	주용도	연면적(m <sup>2</sup> )	연면적(3.3m <sup>2</sup> )	사용승인일
CBD	명동 근린생활시설	중구 명동2가	제2종근린생활시설	1,635	495	16-Nov
	아이타워	강남구 삼성동	업무시설	5,286	1,599	25-Nov
	도운빌딩	강남구 신사동	제1종근린생활시설	1,733	524	22-Nov
GBD	623 빌딩	강남구 신사동	제2종근린생활시설	1,245	377	22-Nov
	더나빌딩	서초구 서초동	제1종근린생활시설	1,136	344	16-Nov
	림코빌딩	강남구 청담동	제2종근린생활시설	1,037	314	17-Nov
ETC	인피니움타워	금천구 시흥동	공장	19,885	6,015	18-Nov
	(주)뉴파워프라즈마 신기술센터	강서구 마곡동	교육연구시설	15,890	4,807	30-Nov
	대한의사협회 회관	용산구 이촌동	교육연구시설	9,251	2,798	25-Nov
	나무기술 R&D센터	강서구 마곡동	교육연구시설	5,979	1,809	09-Nov
	성수동 업무시설	성동구 성수동1가	업무시설	2,912	881	17-Nov
	성수동 근린생활시설	성동구 성수동1가	제2종근린생활시설	2,679	810	29-Nov
	스카이블루	은평구 응암동	교육연구시설	1,586	480	08-Nov
	창평빌딩	마포구 창전동	제2종근린생활시설	1,576	477	08-Nov
	쇼파르 에비뉴	마포구 동교동	제2종근린생활시설	1,378	417	11-Nov
	은재빌딩	용산구 동자동	제2종근린생활시설	1,248	377	09-Nov
	미래텔레콤	송파구 방이동	제2종근린생활시설	1,061	321	24-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 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 = 1,230.70 KRW (0.81 USD = 1,000 KRW) as of 27th January 2023

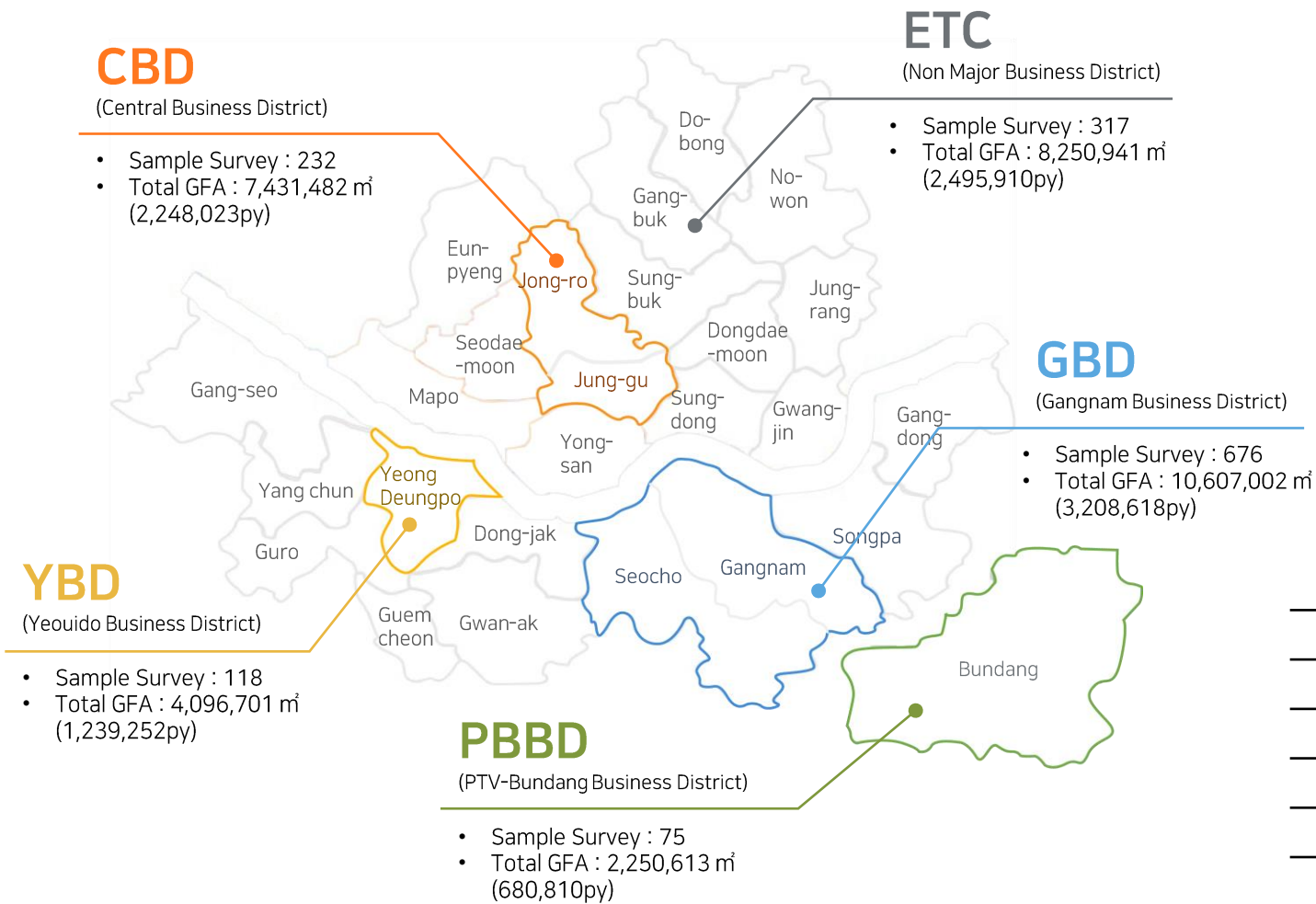
## 5 Regional Divisions in Seoul

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 1,418

	P	S	A	B
CBD	45	65	33	89
GBD	33	82	93	468
YBD	20	24	33	41
ETC	46	61	55	155
PBB	12	15	18	30

### • NOC (Net Occupancy Cost)

The monthly cost that 1m<sup>2</sup> of net area 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

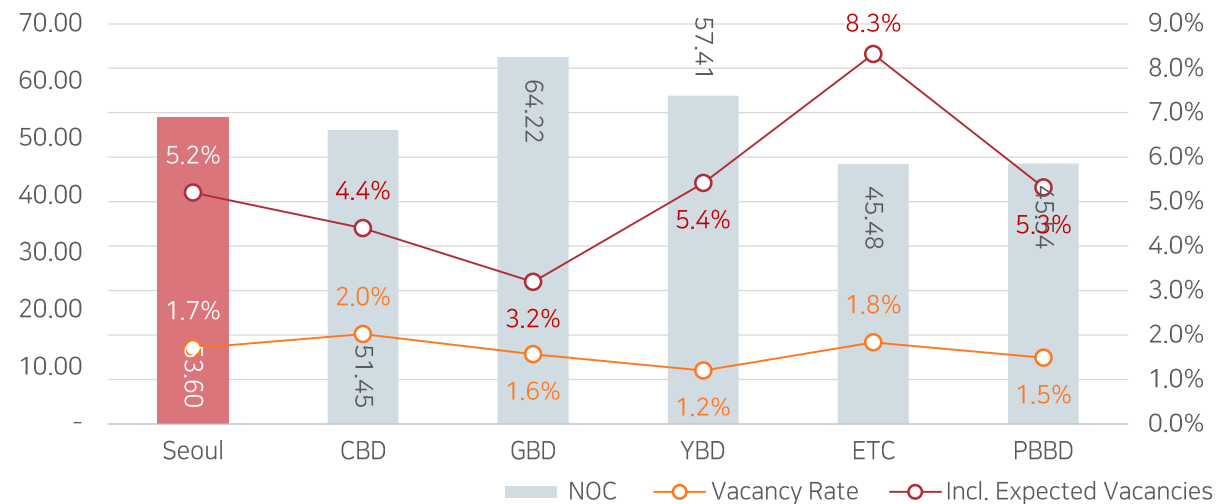
1.70% ↓

Avg, NOC

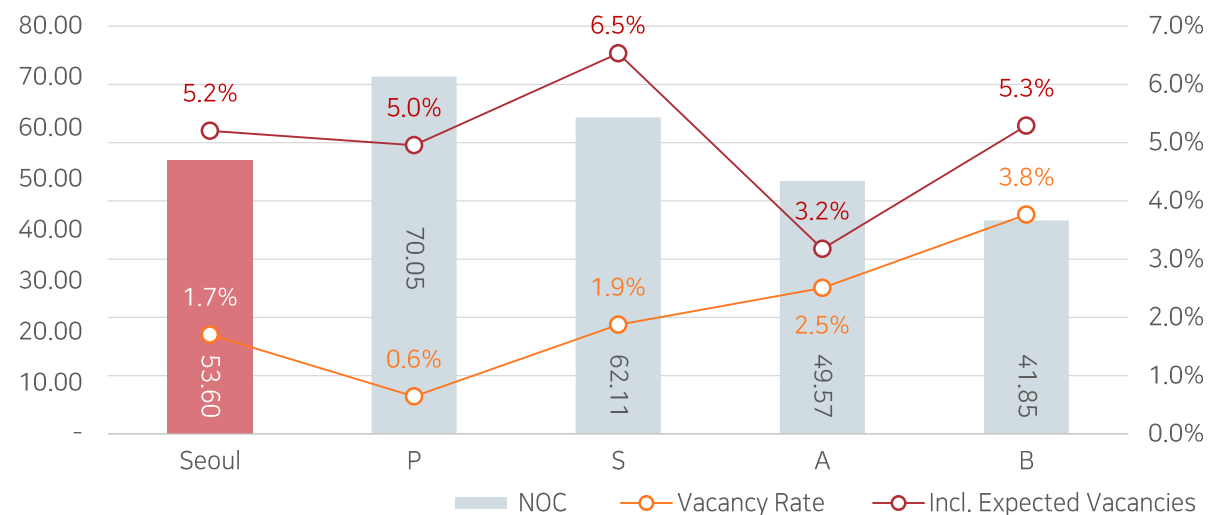
\$ 53.60 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
22.57	247.24	8.17

The average vacancy rate of the office buildings in Seoul is 1.70 % as of December 2022, and the average NOC is \$ 53.60.



■ Vacancy Rate & NOC in Seoul and Each District



■ Vacancy Rate & NOC in Seoul & Each Building Category

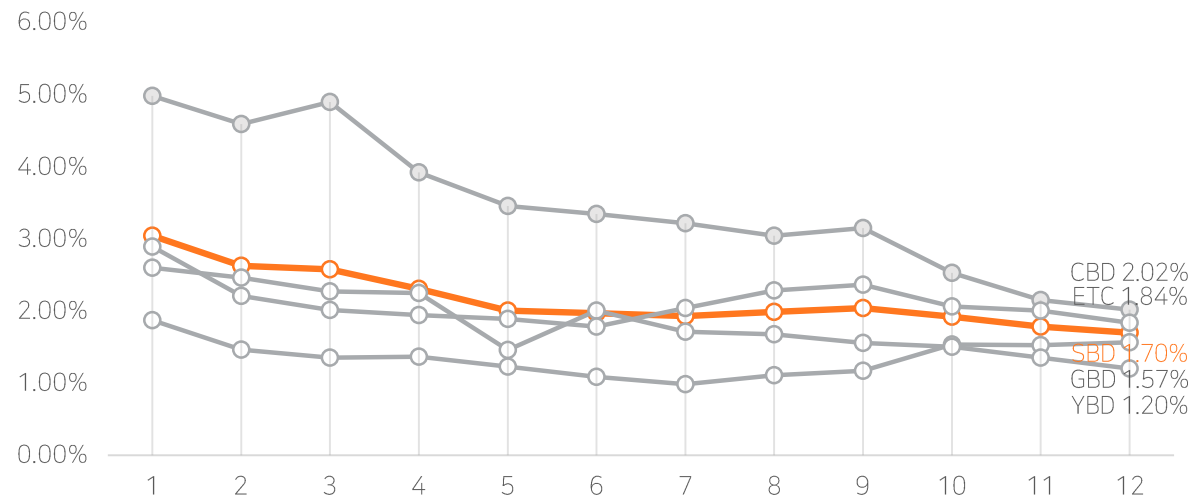
# 01 SBD Seoul Capital Area

The following chart indicates the vacancy level in Seoul during December 2022.

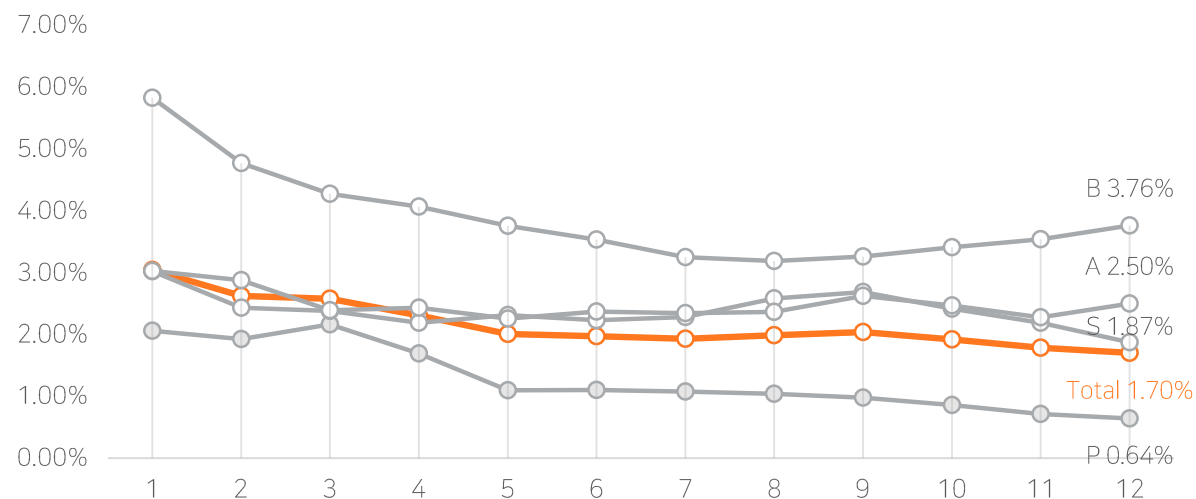
The office space of 19,240m<sup>2</sup> in JW Tower came on the lease market in GBD as the ownership of the tower was changed and JW Pharmaceutical and its affiliates, the former major tenants, moved out from the tower to Gwacheon-si. On the other hand, the quality tenants such as Honda Korea, Daeryun Law Firm LLC., Galderma Korea, Southcape, Heart Scan moved in to Dong-il Tower, filling the vacant units of 12,250m<sup>2</sup> in the tower.

Parc I NH Financial Tower in YBD received a new tenant, Raon Secure, now renting the two floors of 6,400m<sup>2</sup> in the tower.

The vacant 6 floors of 10,710m<sup>2</sup> in Zanca Dream Tower in Gasan-dong was taken by a few tenants such as Korea Appraisal Center, renting 3 out of the 6 floors, which used be the affiliate of Trenbe Corporation. In Samgu Building in Yongsan-gu, Korean Medical Association and its affiliates moved out to the other office building nearby, which means the 3 floors of 4,270m<sup>2</sup> in Samgu Building came on the lease market in Seoul.



Monthly Vacancy Rate in 5 Main Districts



Monthly Vacancy Rate for Different Size of Buildings

# 02 CBD Central Seoul

Vacancy rate

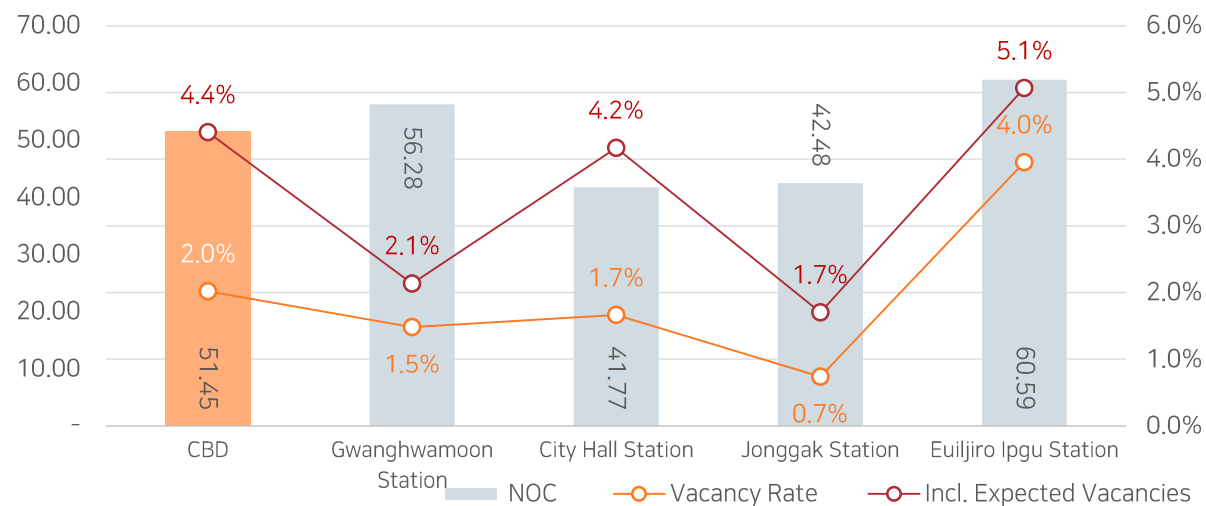
2.02 % ↓

Avg, NOC

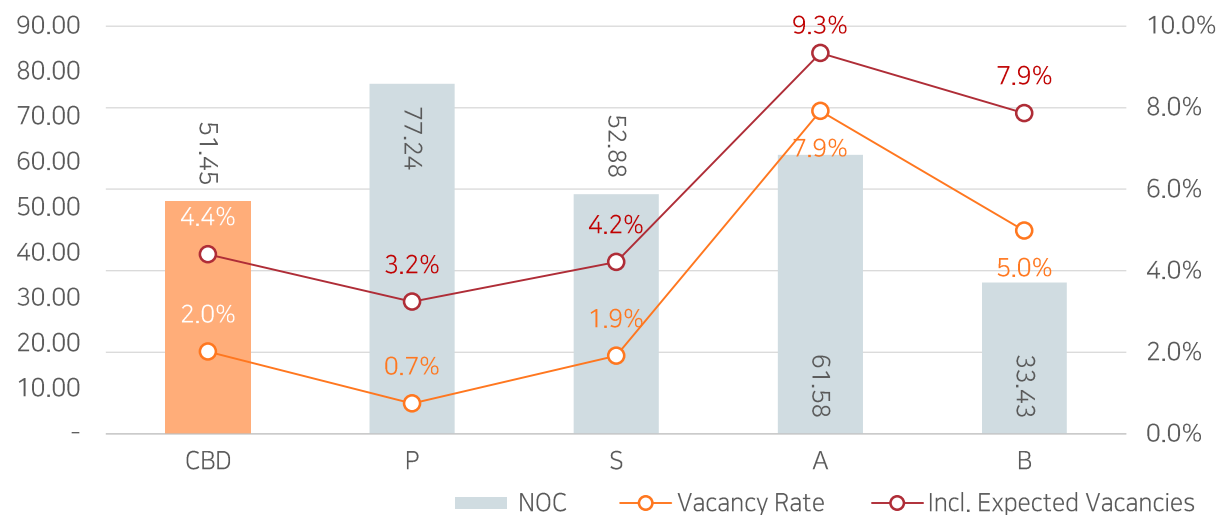
\$ 51.45 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
21.94	226.81	8.95

The average vacancy rate of the office buildings in CBD is 2.02 % as of December 2022, and the average NOC is \$ 51.45.



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



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

# GBD Gangnam

Vacancy rate

1.57% ↑

Avg, NOC

\$ 64.22 ↑

Avg.  
Rent

29.69

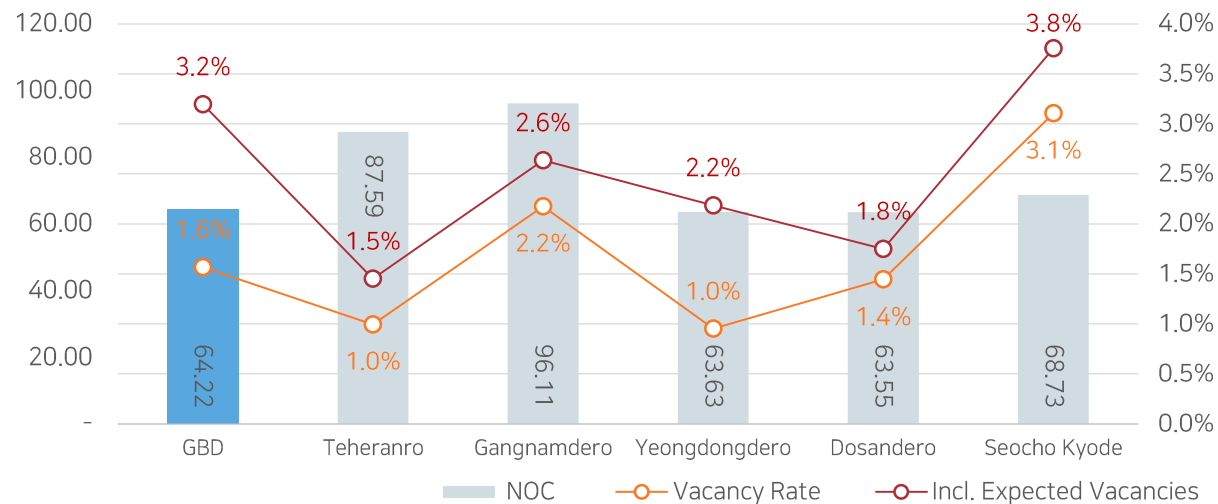
Avg.  
Deposit

353.15

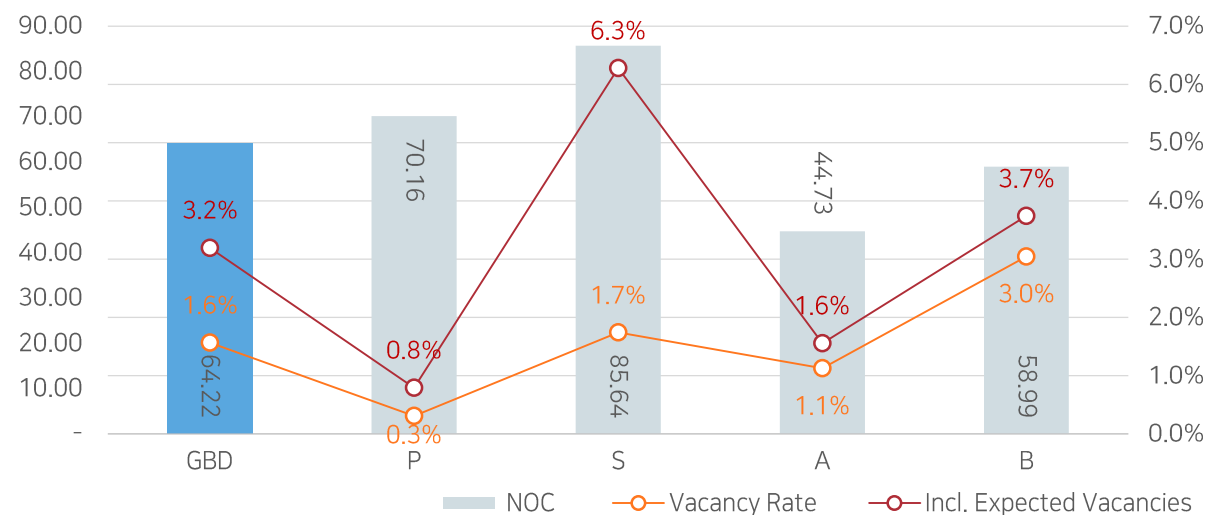
Avg.  
Management.  
Fee

8.05

The average vacancy rate of the office buildings in GBD is 1.57 % as of December 2022, and the average NOC is \$ 64.22.



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



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

# 24 YBD Yeouido & Yeongdeungpo

Vacancy rate

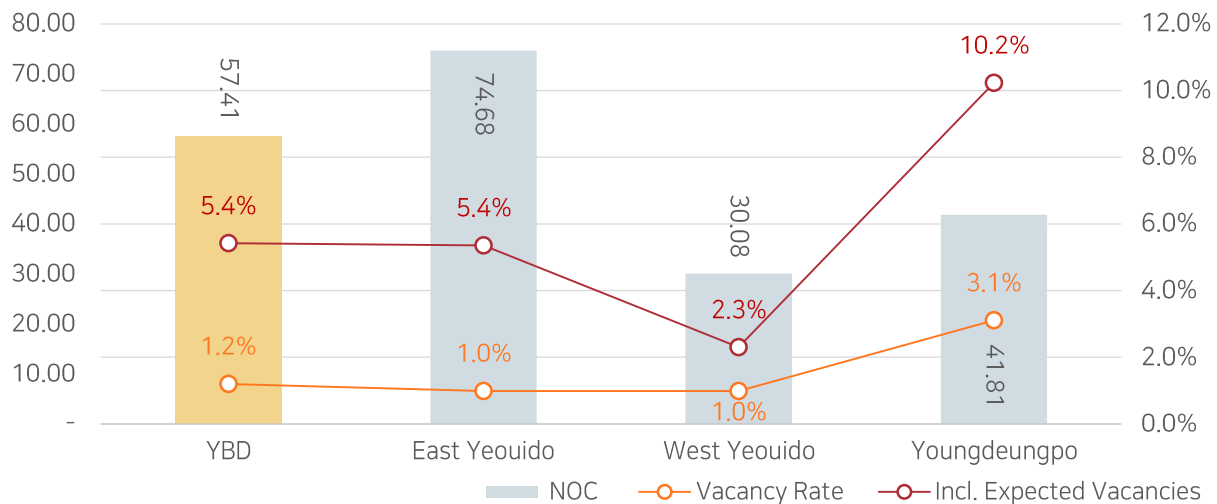
1.20% ↓

Avg, NOC

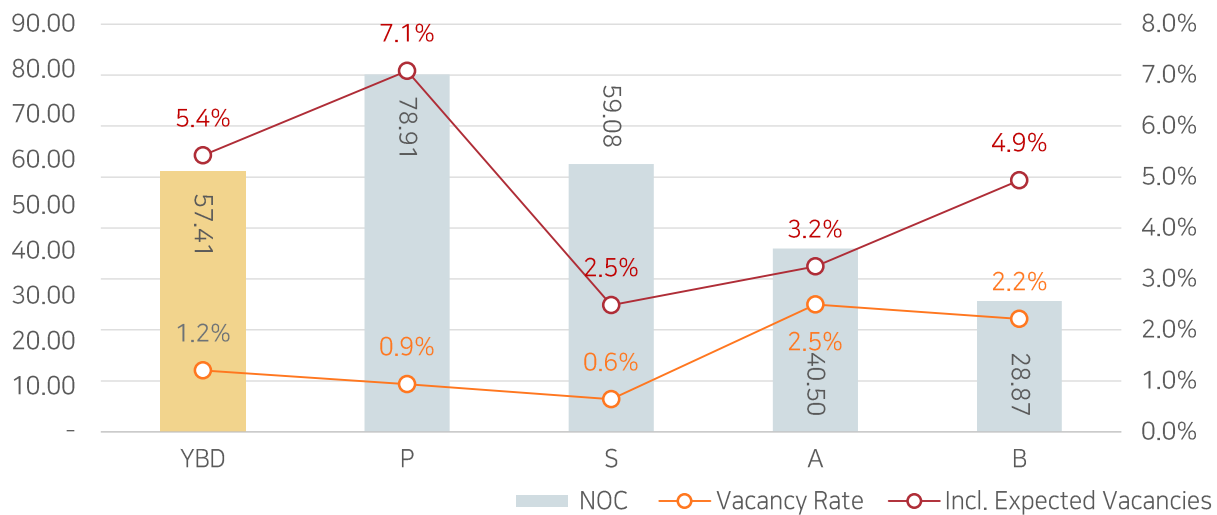
\$ 57.41 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
21.98	226.04	9.08

The average vacancy rate of the office buildings in YBD is 1.20 % as of December 2022, and the average NOC is \$ 57.41.



■ 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

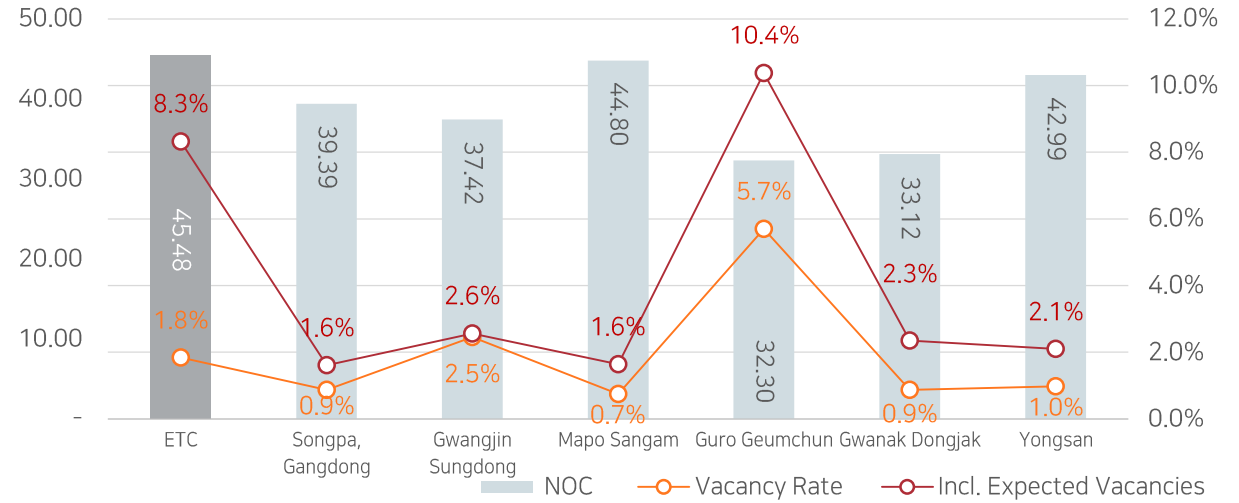
1.84 % ↓

Avg, NOC

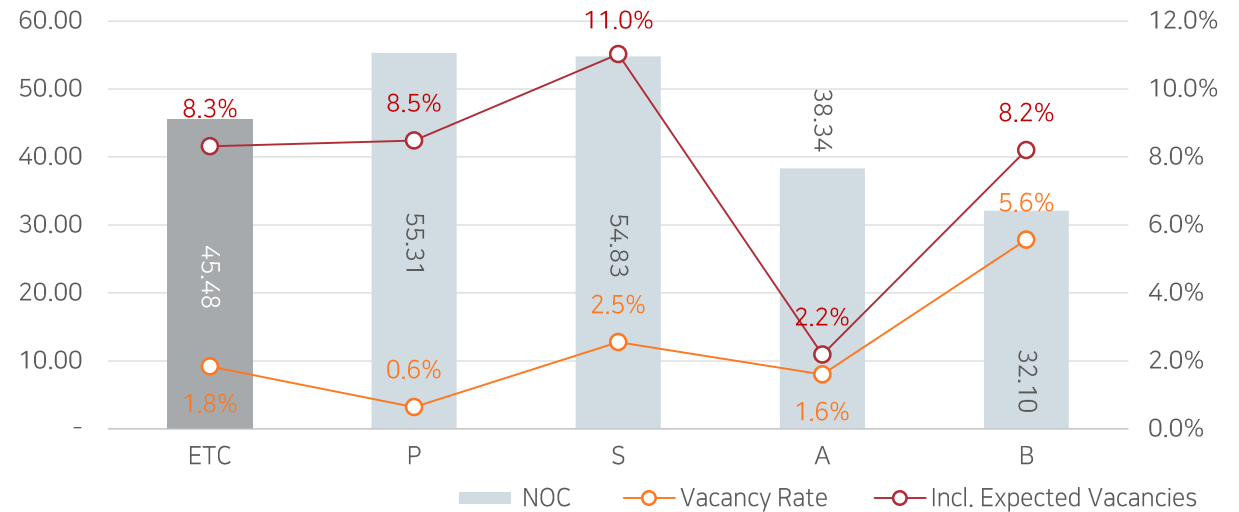
\$ 45.48 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
17.52	190.68	6.86

The average vacancy rate of the office buildings in ETC is 1.84 % as of December 2022, and the average NOC is \$ 45.48.



■ 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

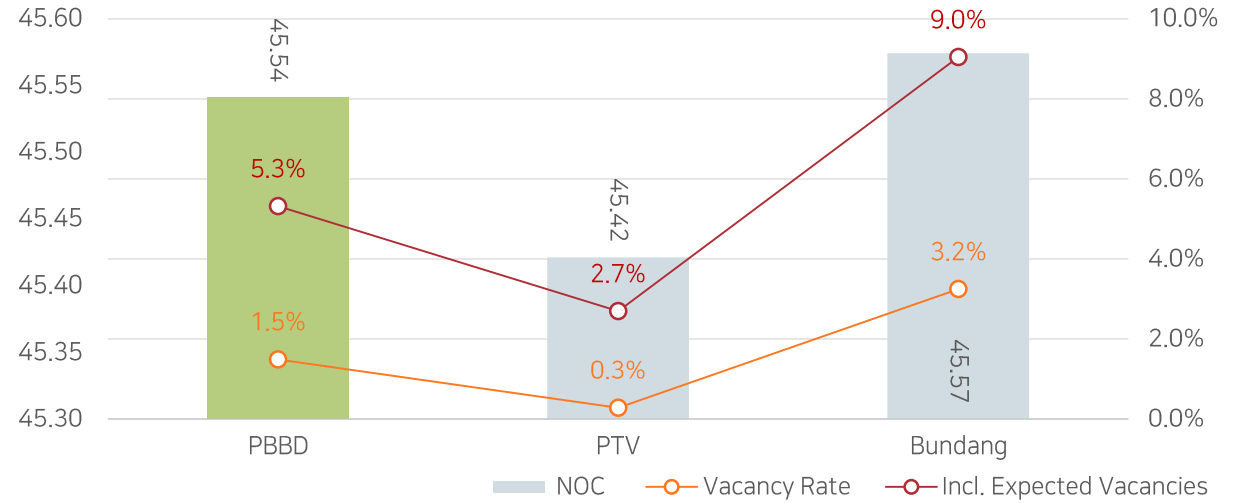
1.49% ↓

Avg, NOC

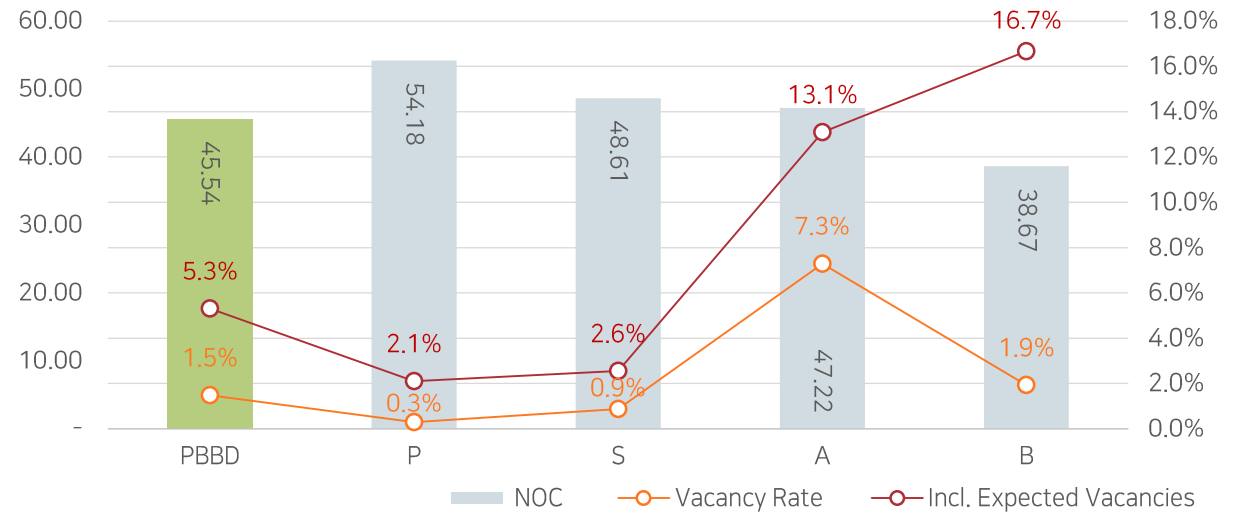
\$ 45.54 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
18.65	224.89	7.53

The average vacancy rate of the office buildings in PBBD is 1.49 % as of December 2022, and the average NOC is \$ 45.54.



■ 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	872,312	237.62	24.76	8.93	56.28	1.48%
	City Hall Station	953,407	190.42	18.59	8.78	41.77	1.66%
	Jonggak Station	969,915	181.84	17.84	7.94	42.48	0.74%
	Euiljiro Ipgu Station	868,722	258.15	26.04	9.66	60.59	3.95%
GBD	Teheranro	3,647,480	485.70	44.41	9.24	87.59	1.00%
	Gangnamdero	1,593,852	579.34	51.82	9.23	96.11	2.18%
	Yeongdongdero	927,922	214.04	20.38	8.65	63.63	0.95%
	Dosandero	340,085	457.88	33.15	8.93	63.55	1.44%
	Seocho Gyodae	467,650	395.89	31.36	7.75	68.73	3.11%
YBD	East Yeouido	3,124,920	290.33	28.92	10.80	74.68	0.99%
	West Yeouido	561,596	115.11	10.82	6.35	30.08	0.99%
	Youngdeungpo	410,185	176.82	15.89	7.40	41.81	3.11%
ETC	Songpa, Gangdong	2,152,145	199.08	15.83	6.29	39.39	0.87%
	Gwangjin Sungdong	546,079	201.44	16.32	4.34	37.42	2.46%
	Mapo Sangam	2,083,640	182.05	17.95	7.93	44.80	0.75%
	Guro Geumchun	895,647	131.52	12.65	4.49	32.30	5.70%
	Gwanak Dongjak	523,451	209.06	12.25	4.99	33.12	0.87%
	Yongsan	751,562	178.50	14.07	7.82	42.99	0.98%
PBBD	PTV	1,334,019	181.36	17.55	6.58	45.42	0.28%
	Bundang	916,593	237.03	18.96	7.80	45.57	3.25%



## Land Use Information by District

District	Building Name	Address	Land Use	GFA (㎡)	Completion
CBD	Myong-dong (Commercial Facility)	Myeong-dong 2-ga Jung-gu	#2 Commercial	1,635	16-Nov
	I Tower	Samseong-dong Gangnam-gu	Office	5,286	25-Nov
	Dowoon Building	Sinsa-dong Gangnam-gu	#1 Commercial	1,733	22-Nov
GBD	623 Building	Sinsa-dong Gangnam-gu	#2 Commercial	1,245	22-Nov
	DunaBuilding	Seocho-dong Seocho-gu	#1 Commercial	1,136	16-Nov
	Limco Building	Cheongdam-dong Gangnam-gu	#2 Commercial	1,037	17-Nov
ETC	Infinium Tower	Siheung-dong Geumcheon-gu	Factory	19,885	18-Nov
	New Power Plazma Ltd.	Magok-dong Gangseo-gu	Educational	15,890	30-Nov
	Korean Medical Association Building	Ichon-dong Yongsan-gu	Educational	9,251	25-Nov
	Namu Technology R&D Center	Magok-dong Gangseo-gu	Educational	5,979	09-Nov
	Sungsoo-dong (Office Facility)	Seongsu-dong 1-ga Seongdong-gu	Office	2,912	17-Nov
	Sungsoo-dong (Commercial Facility)	Seongsu-dong 1-ga Seongdong-gu	#2 Commercial	2,679	29-Nov
	Sky Blue	Eungam-dong Eunpyeong-gu	Educational	1,586	08-Nov
	Changpyeong Building	Changjeon-dong Mapo-gu	#2 Commercial	1,576	08-Nov
	Shophar Avenue	Donggyo-dong Mapo-gu	#2 Commercial	1,378	11-Nov
	Eunjae Building	Dongja-dong Yongsan-gu	#2 Commercial	1,248	09-Nov
	Mirae Telecom	Bangi-dong Songpa-gu	#2 Commercial	1,061	24-Nov



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