



Press Release

Prague, 31st July 2025

Regional Research Forum Presents H1 2025 Brno and Ostrava Office Market Data

About the Regional Research Forum

The members of the Regional Research Forum (CBRE, Colliers, Cushman & Wakefield, iO Partners, Knight Frank and Savills) aim to provide clients with consistent, accurate, and transparent data about the regional office markets in the Czech Republic. The members share non-sensitive information and believe that the Regional Research Forum will contribute to the improvement of transparency on the Czech regional office markets.

Brno

- One office building was completed in the first half of 2025, Titanium X (10,900 sq m)
- More than 103,100 sq m of office space is under construction
- The energy sector dominated the demand in H1 2025
- The vacancy rate increased in annual comparison to 12.7%, however, compared to the end of last year, it dropped by 0.6 percentage points
- Prime headline rents grew slightly to €17-18 per sq m per month

"A significant factor driving demand for office space in Brno is the wide availability of qualified professionals, due to the high number of students and graduates in technical fields from local universities. The market also benefits from the intensive development of modern office buildings that meet companies' high standards for technical quality, ESG criteria, and attractive locations in easily accessible central areas of the city with good amenities.

Notably, although the total supply of office space in Brno is approximately 5.6 times smaller than in Prague, the amount of space currently under construction has already reached half the level of Prague. This trend highlights the dynamic nature of the Brno market. In contrast, new office development in Ostrava is limited, which has also contributed to a slight year-on-year decrease in vacancy," says Jan Babka, Head of Office Leasing at Knight Frank.

Brno Office Supply/Stock

The total modern office stock in Brno amounted to 704,900 sq m in H1 2025. Class A buildings accounted for 73% of the total stock, while the remaining 27% consisted of Class B offices.

One building was completed in Brno in the first half of this year, Titanium Skylight X (10,900 sq m) by the developer JRA Estate. In H1 2025, construction works were launched on the following projects: Dornych (27,600 sq m), two buildings in CTPark Brno - A 3.2 EF (8,700 sq m) and G2 (7,400 sq m).

Currently, ten projects are under construction with a total modern office space of 103,100 sq m. Major projects include a part from the aforementioned Dornych (27,600 sq m), also Ponávka A4 (16,800 sq m) and Cerit III (10,800 sq m). Cerit III (10,800 sq m) is also the only project to be completed in the second half of this year, bringing the annual new supply to 21,700 sq m in 2025. Next year, almost 52,000 sq m should be delivered to the market.

Brno major office transactions

The largest transaction in the first half of 2025 was a pre-lease by a company from the energy sector in the Nová Zbrojovka D4 project (10,600 sq m), followed by a pre-lease by Sudop Real (3,300 sq m) in the Landmark project, and a new lease by Abugo in the Campus Science Park DE building (1,900 sq m).

The energy sector accounted for the largest share of total demand in the first half of the year, followed by companies from the IT and construction sector.

For further information please contact any member of the Regional Research Forum:



+420 771 288 023



+420 736 606 905



+420 736 606 905



+420 607 841 941



+420 224 217 217



+420 731 889 963

In addition to new leases and expansions, pre-leases also represented a significant portion of the total occupational activity in the first half of the year.

Vacancy

At the end of the first half of 2025, a total of 89,500 sq m of vacant modern office space was recorded in Brno. The vacancy rate increased year-on-year by 1.1 percentage points to 12.7%. However, compared to the end of last year, this represented a decrease of 0.6 percentage points.

Rents

Prime headline rents in Brno increased in the first half of 2025, ranging between €17.00 and 18.00 per sq m per month.

Ostrava

- **New construction remains limited in Ostrava, no new office project was completed in H1 2025, construction started on the Václav multifunctional building**
- **The office vacancy rate in Ostrava decreased by 1.1 percentage points year-on-year to 10.7%**
- **Prime headline rents remained stable**

Ostrava Office Supply/Stock

The total modern office stock in Ostrava at the end of H1 2025 amounted to 245,700 sq m. No new office buildings were completed in H1 2025. The only project under construction in Ostrava is the Václav multifunctional building (3,000 sq m) to be completed in 2027.

Ostrava's major office transactions

The new lease by Satum Czech in the IQ Ostrava building (1,900 sq m) was the most significant deal recorded in H1 2025. In addition to the financial sector, technology companies were also strongly represented in the take-up.

Vacancy

At the end of the first half of 2025, 26,400 sq m of vacant office space was recorded in Ostrava. The vacancy rate decreased by 1.1 percentage points to 10.7% in annual comparison. Compared to the end of 2024, it dropped by 0.8 percentage points.

Rents

In H1 2025, prime headline rents on the Ostrava office market remained unchanged at €14.00 - 14.50 sq m/month.

For further information please contact any member of the Regional Research Forum:



+420 771 288 023



+420 736 606 905



+420 736 606 905



+420 607 841 941



+420 224 217 217



+420 731 889 963

Appendix

Regional Research Forum

The minimum requirements for inclusion into the modern office stock of either Class A or Class B include:

- The building was built or refurbished after 1990
- Available units are being advertised in an appropriate way
- The GLA of the building exceeds 1,000 sq m

When assessing the property quality, the major categories included are as follows, with a brief description:

- **Technical specifications** – how well is the property built and equipped
- **Smart technologies** – how efficient the buildings are, what smart technologies they use and what extras beyond “standard” property equipment they offer
- **Location** – accessibility, and services and amenities in the proximity of the property
- **Service and security** – how safe the building is and how it is managed
- **Parking** – parking ratios, with different requirements for properties in the city centre, inner city and outer city
- **Age of building** – building completion or the latest refurbishment date
- **Subjective evaluation** – subjective assessment by Regional Research Forum members

Each of the criteria has subcategories, which enable scoring of the properties, resulting in the final score of the property. The maximum weight of each category is as follows:

Category	Share on total
Technical Specifications	41%
Smart Technologies	18%
Location	9%
Service & Security	9%
Age of Building	8%
Parking	8%
Subjective Evaluation	7%

Definitions

Stock:	Total completed office space (occupied and vacant), newly built or refurbished since 1990, A and B class offices, owner-occupied and for lease. Public authority buildings and buildings with a leasable area lower than 1,000 sq m are excluded.
New supply:	Completed newly built or refurbished buildings that obtained a use permit in the given period.
A-Class Office Building:	To earn A-Class status, a building must meet at least 6 out of 7 “Hard Criteria” and 5 out of 7 “Soft Criteria.”
B-Class Office Building:	To earn B-Class status, a building must meet at least 2 out of 7 “Hard Criteria” and 4 out of 7 “Soft Criteria.”
Take-up:	A gross figure representing the total floor space known to have been let or pre-let, sold or pre-sold to tenants or owner-occupiers over a specified period of time. It does not include space that is under offer. A property is taken up when the contract is signed. Gross take-up includes renegotiations, lease extensions and subleases, net take-up excludes these.
Pre-lease:	Active pre-leasing for an office building begins as soon as the preliminary design drawings are ready to show to prospective tenants. Pre-leasing occurs until the start of construction.
Vacancy rate:	Ratio of physically vacant space in completed buildings to the total stock.
Prime rent:	Achieved rents that relate to new prime, high specification units in prime locations.

COPYRIGHT © Regional Research Forum 2025

This publication is the property of the Regional Research Forum (members: CBRE, Colliers, Cushman & Wakefield, iO Partners, Knight Frank and Savills) and cannot be copied, reproduced or redistributed in any form or by any means, either in whole or in part, without quoting the Regional Research Forum as the information source. The information contained in this publication has been obtained from sources considered reliable. However, we do not guarantee the accuracy of the information. Please inform us about

For further information please contact any member of the Regional Research Forum:



+420 771 288 023



+420 736 606 905



+420 736 606 905



+420 607 841 941



+420 224 217 217



+420 731 889 963

inaccuracies so we can correct them. The Regional Research Forum accepts no liability for any damage or loss caused by any unintentional inaccuracies in this report.

For further information please contact any member of the Regional Research Forum:



+420 771 288 023



+420 736 606 905



+420 736 606 905



+420 607 841 941



+420 224 217 217



+420 731 889 963
