

# EMEA Office Fit-Out Cost Guide 2025



Research

EMEA

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# Introduction

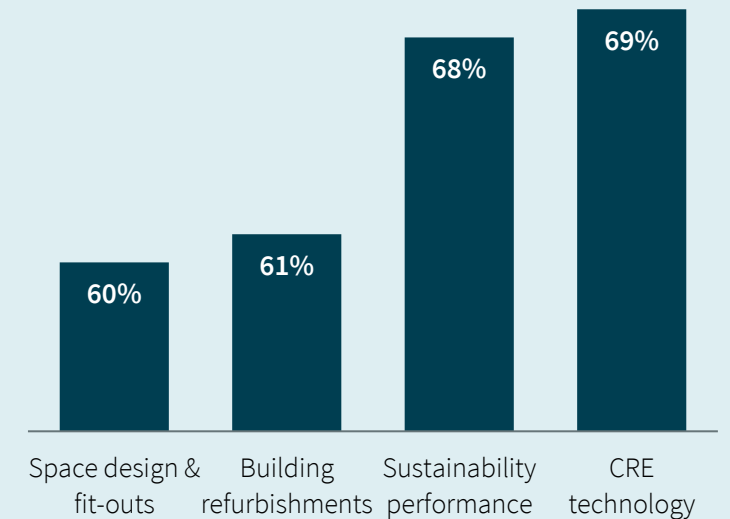
Across Europe, the Middle East, and Africa (EMEA), there's a renewed focus on the value of office spaces. Hybrid working remains the dominant workplace policy, but with a structured approach encouraging or mandating employee presence on specific days. This emphasis on office attendance is driving many corporate clients to seek high-quality spaces that enhance employee experience and performance, with greater demand for Grade A office space and focus on investing in high quality office fit-outs.

JLL research showed general optimism towards investing in workspaces in late 2024 and early 2025, with varied corporate sentiment towards targeted investment across EMEA. In the Middle East, Belgium, and Ireland, companies are focussing on investing in overall space design and fit-outs, while in the UK, Germany and France organisations are more likely to target investment in sustainability performance and technology integration in their workspaces.

However, the fit-out market continues to face challenges, including increased material costs, labour shortages, pressure on project timelines, and budget constraints. While inflation has stabilised in many countries, ongoing political and global economic uncertainty is increasing risks of price increases once more. The situation is further complicated by U.S. trade policies which may impact material costs and supply chains directly and indirectly in coming months.

Despite the current economic environment encouraging caution, growth-oriented corporations will continue to invest in office fit-outs to support their strategic goals. Organisations are responding to these challenges with adaptive strategies, with many companies exploring targeting investments in enhancing employee experience through design, innovative technology solutions or exploring refurbishment opportunities.

**Across EMEA the majority of companies are planning to increase investment in office improvements up to 2030**



Proportion of organisations planning to increase investment by 2030.

Source: JLL Research, Future of Work 2024

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# Key findings

## **1** Greater focus on office attendance in 2025

While hybrid working remains the prevalent workplace policy across EMEA, a majority of companies are planning to increase the number of days in the office and focus on return to office (RTO) in 2025. To balance costs with workspace improvement strategies, companies are focused on smaller footprints but higher quality, and targeted investment in technology to enhance existing environments and support RTO strategies.

## **2** Costs pressures continue across EMEA

Inflation has been a significant challenge across EMEA since the pandemic. While there have been some signs of stabilisation in early 2025, continued uncertainty is dampening views of further inflation reduction. The recent global economic uncertainty is also creating increased risks of price fluctuations, supply chain disruption, and currency volatility, and is likely to influence prices in the next 12 months.

## **3** Market uncertainty impacting project timeframes

Office fit-out projects are seeing increasingly tighter timeframes for delivery. Increased time pressures are reported across most major markets in Europe and the Middle East, due in part to delayed decision-making and uncertainty in markets. Implications of project delays and shortened timeframes are impacting material availability, lead times, labour availability, and ultimately, pricing for projects.

## **4** Sustainability remains top corporate driver

Driven by corporate commitments and local standards, sustainability remains the driving force in many relocation strategies and office fit-outs across EMEA. Amid the aging building stock in major European cities and shortage of sustainability-certified offices, companies increasingly need to assess the cost-benefits of relocation to newer Grade A buildings compared to upgrading existing assets.

# Greater focus on the office in 2025

In Europe and the Middle East, hybrid working remains the predominant workstyle, distinguishing these regions from others globally. Employee-centric policies continue to drive workplace design and location strategies, reflecting a deeper understanding that a 'hybrid workplace' must be tailored to each company's unique needs and working practices. There is a renewed push for in-office attendance, as organisations seek to increase the number of days employees work from the office within their hybrid policies.

JLL research reveals that while 65% of organisations in EMEA have adopted hybrid workplace policies, office attendance remains a key concern. 61% of companies are focussed on increasing utilisation, and 44% plan to increase office-based work days over the next five years. This focus on physical presence is driving continued demand for high-quality office spaces and fit-outs that enhance workplace experience and performance.

Technology integration is at the forefront of enhancing hybrid work environments across all office typologies. Companies are investing in improved and extended AV systems for both individual and collaborative workspaces. Additionally, an increasing number of organisations are implementing utilisation monitoring to manage attendance strategies and optimize occupancy patterns.

Despite ongoing cost pressures for Corporate Real Estate functions, technology investments aimed at improving energy and operational efficiency are likely to take priority in capital planning. These investments reflect a strategic approach to balancing the demands of hybrid work with the need for cost-effective, sustainable office spaces.

**65%**

of organisations have a hybrid workplace policy

**61%**

of EMEA companies plan to increase utilisation in the five years

**44%**

Plan to increase the number of days employees are in the office by 2030

Source: JLL Research, Future of Work 2024

As we navigate this evolving landscape, it's clear that the future of work in EMEA is not just about where work happens, but how it happens. Organisations that can effectively blend the benefits of remote work with the collaborative power of in-office presence will be best positioned for success in this new era of work.

JLL's Office Fit-Out Cost Guide provides a benchmark to understand typical costs for office fit out projects.

To address the complexity of different work settings , a nine-point pricing matrix has been developed, adapting standardised layouts to various quality levels and office configurations. This approach enables more precise budgeting across different project goals.

While no single typology can provide the perfect solution, matching your workforce needs to space requirements is critical to inform strategic capital investment that supports corporate ambitions and workforce needs.

Source: JLL Research 2025

**Note:** All costs shown in Euro. Total fit-out cost €/sqm.

		Office layout typology		
		Open and flexible (Progressive)	High spatial variety (Moderate)	Structured (Traditional)
		Open floor plan with no enclosed offices. Prioritisation of open collaboration spaces and agile work zones distributed across floor plan.	Open floor plan with no enclosed offices. High mix of open and enclosed collaboration spaces, agile work zones and focus areas.	Focus on dedicated desks single private offices and enclosed meeting rooms. Collaboration and social spaces clustered in one area.
Space quality and complexity	Baseline Simple aesthetic with finishes focused on function.	€1,581	€1,688	€1,763
	Medium Standard project complexity with a few unique design features and average-quality materials finishes.	€1,705	€1,824	€1,907
	High Emphasises top-quality finishes, with increased effort spent on aesthetics and detail design.	€1,953	€2,096	€2,196

# Average Fit-Out Cost EMEA

## How we arrived at the cost?

To arrive at the average cost, our teams priced a standardised project with benchmarked specifications. The project is a contemporary office building in a central business district, with a moderately open and flexible layout and medium-quality finishes as per JLL design standards.

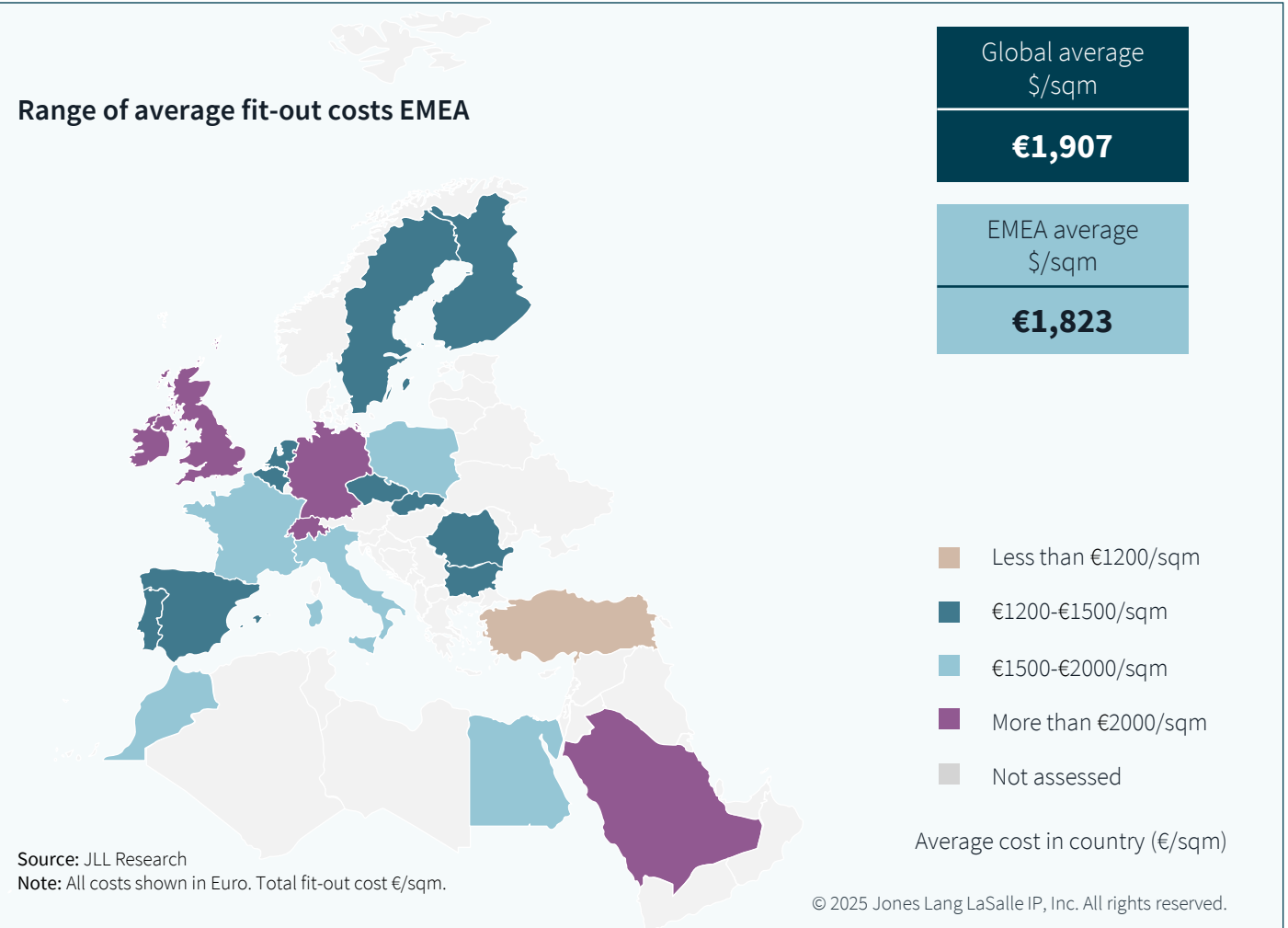
## What's the average?

The average office fit-out cost for a moderate style medium quality office in EMEA is €1,823/sqm while the global average is €1,907/sqm (as of Q1 2025). The cost does not reflect recent market changes and outlook on tariff impact.

## Context

- Average costs of fitting out an office vary across geographies, with costs in each region influenced by local material and labour costs.
- There is a complex interplay of regional and local economic, regulatory, and market factors that affect the fit-out industry across different regions.

## Range of average fit-out costs EMEA



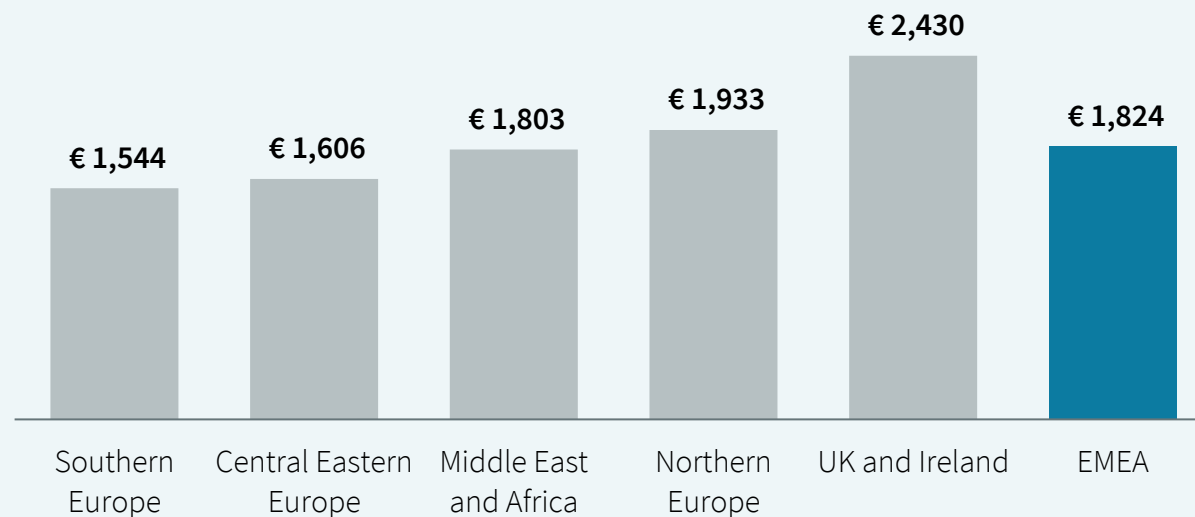
# Average fit-out cost in EMEA regions

Average costs vary greatly across EMEA, with Northern Europe typically having the highest costs, while Southern Europe costs are comparably lower. Materials costs have risen across all countries and regions in 2024, and 73% of markets assessed anticipate construction prices to increase again in the next 12 months when asked in Q1 2025. Recent global trade uncertainty will likely have further impact on prices in the next 12 months, but the specific impact is yet to be seen.

Northern Europe and UK & Ireland have been exposed to high inflation, material costs, and labour wages in recent years.

Labor shortages were reported to have increased construction prices across almost 80% of markets assessed in this year's guide, particularly in countries in Southern Europe.

Supply chain disruption was reported to affect costs in around half of EMEA markets in 2024, with the Middle East and North Africa disproportionately affected.



## Countries covered

**Southern Europe:** Spain, Portugal, Italy

**Central Eastern Europe:** Poland, Romania, Slovakia, Hungary, Czech Republic,

**Middle East and Africa:** UAE, Saudi Arabia, Morocco, Egypt, South Africa, Israel, Turkey

**Northern Europe:** France, Germany, Netherlands, Belgium, Finland, Sweden, Switzerland, Luxembourg

**UK and Ireland:** UK, Ireland

Source: JLL Research 2025

Note: All costs shown in Euro. Total fit-out cost €/sqm.

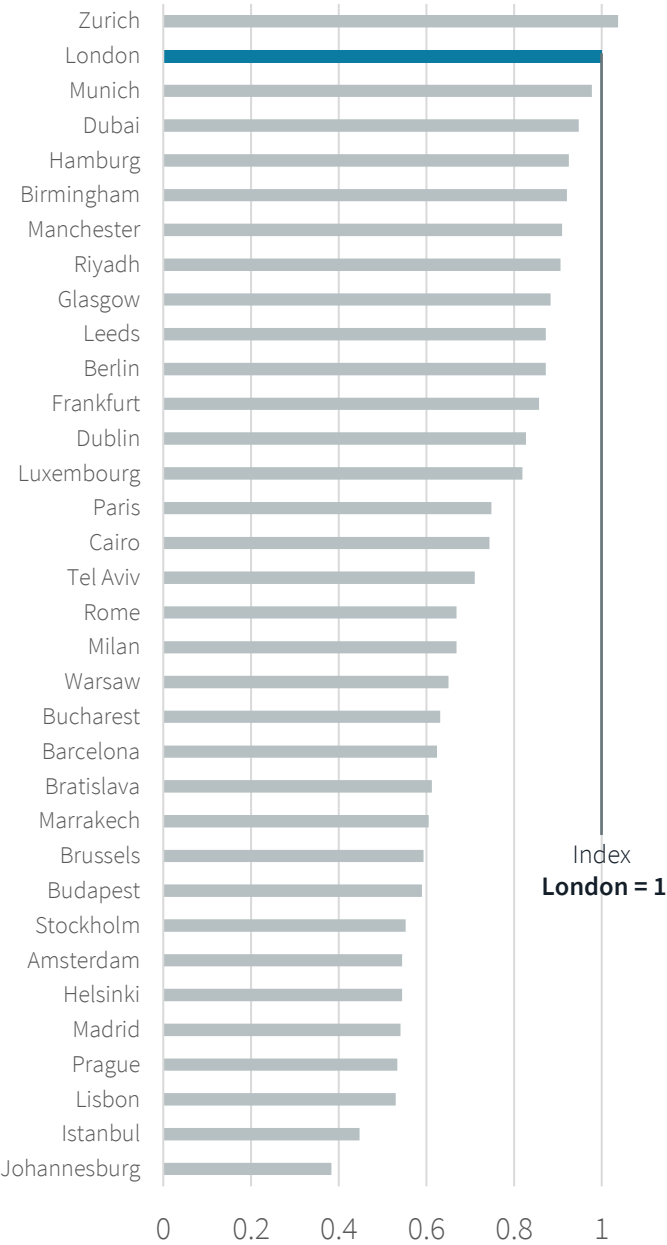


# City cost index

Understanding costs in key cities can be critical to portfolio CAPEX planning and the implementation of corporate design requirements across regional locations.

To understand the relative difference in costs, comparable costs of office fit-outs in the capital city of each country is assessed against a baseline to London.

The top five cities in EMEA are Zurich, London, Munich, Dubai and Riyadh. These cities remain highly competitive locations for fit-out projects, with high costs associated to labour, materials and market expectations of high-quality finishes.





# Macroeconomic context

While cost drivers will vary across geographies and local markets, there are common factors across many regions. Rising costs of material and labour remain key drivers, and although inflation has stabilised across most countries, it continues to be higher than in the years leading up to the pandemic. While base GDP forecast have been positive across Europe in early 2025, the ongoing uncertainty and impact surrounding U.S. trade policy has revised most major economic forecasts to slightly lower growth than previously considered.

## Inflation

While most economies are not expected to see the kind of robust rates of GDP growth that would drive inflation higher, other factors threaten higher price growth. Inflation in Germany, France and the UK have come down and stabilised in the last 12 months and are expected to remain close to central bank targets, while rates in the Netherlands are slightly higher than other European countries. Labour markets in across the region remain tight, and inflation continues to impact wage costs.

## Material costs

Raw material prices rose sharply across EMEA following the pandemic and have not significantly come down. Building equipment and technology costs have been specifically impacted in some countries due to both material prices and increased shipping costs. Material costs also see continued impact from supply chain disruption and the Suez Canal closure, impacting costs in the Middle East due to the local dependence on imported building materials.

## Currency volatility

Overall exchange rates have been stable in Europe and the Middle east, with some notable exceptions. Egypt has seen significant depreciation of its local currency, affected the cost of imported materials and building equipment. Sweden has also been impacted by currency volatility.

## U.S. tariffs

The construction industry should anticipate potential supply chain disruptions and price volatility, especially for projects heavily reliant on imported materials. Uncertainty around U.S. foreign and domestic policy outcomes has forced the construction industry to engage change reactively, making the need to balance longer-term growth needs and short-term impacts increasingly difficult for CRE stakeholders. Electronic and building equipment imported from Asia are common in Europe, and one of the construction costs most exposed to risk and potential increases from tariffs.

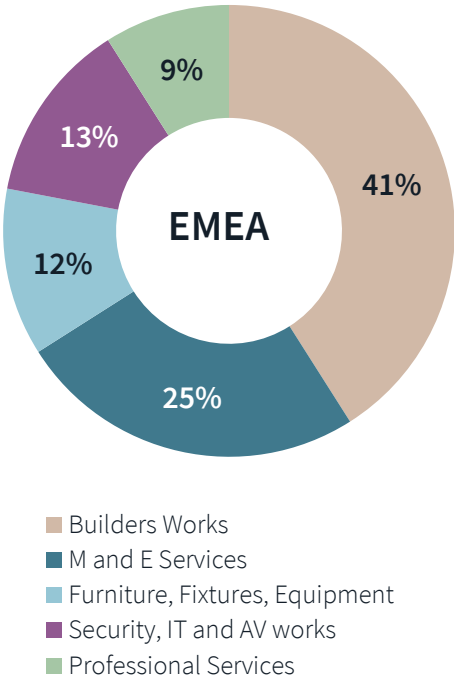
# Cost drivers

The EMEA construction sector is grappling with a complex array of cost pressures in 2025. While cost profiles vary regionally, Builders' Works (from partitions and flooring to finishes and joinery) typically accounts for the largest component of fit-out costs in all countries. The proportion of cost spent on Builders' Works was found to range between 20% and 45% of costs in some countries.

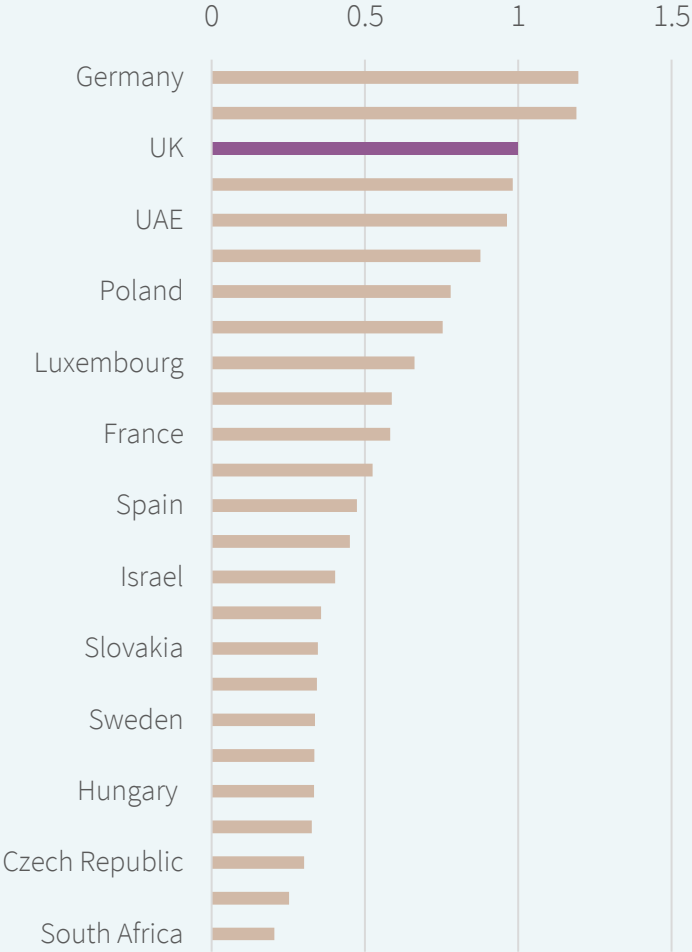
Mechanical & Electrical (M&E) services is increasingly accounting for a higher proportion of spend. The proportion of cost across EMEA was found to be 25%, but this was as high as 40% or more in some countries and cities. The average cost per sqm for M&E services was indexed against London, to highlight countries which have relative high cost for M&E in comparison to overall.

Higher environmental and sustainability standards in offices require more complex M&E services in some cases, while the cost of importing specialist equipment and skilled labour forces for installation are influencing costs in some countries, including Ireland and Germany. Some regions have also seen lead times for M&E equipment increase in the last 12 months, impacting pricing and project timeframes.

Typical fit out cost breakdown

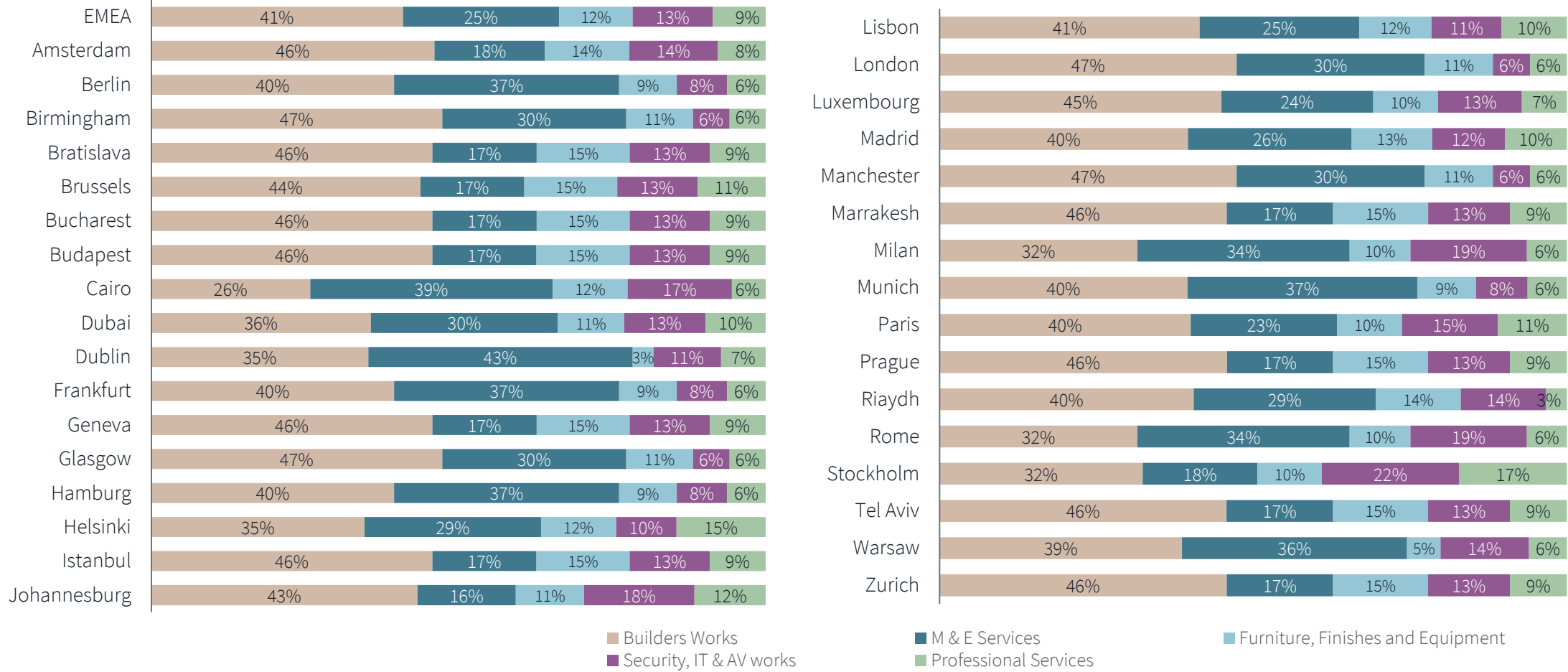


Index of average cost of M&E Services  
(UK = 1)



Source: JLL Research 2025

# Cost categories by country



# Enhancing value through sustainability

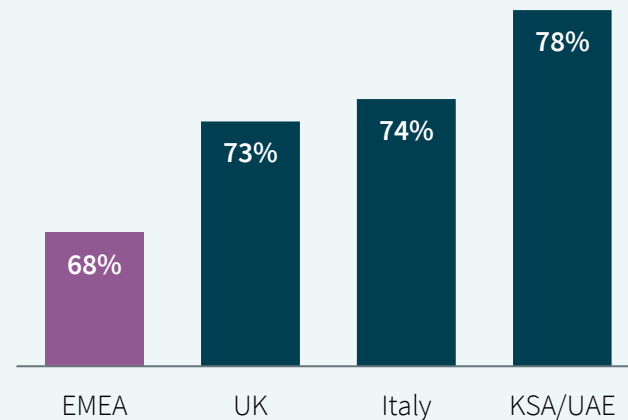
The momentum for sustainable workplaces continues to surge across Europe, the Middle East and Africa (EMEA), driven by corporate commitments, evolving expectations and stricter regulatory requirements.

Our research shows a significant increase in client enquiries for sustainable fit-outs across EMEA over the past 12-24 months, highlighting the growing importance of environmental considerations in workplace design and construction. Furthermore, 68% of Corporate Real Estate leaders in EMEA plan to increase investment in sustainability performance over the next five years, with sentiment strongest in the Middle East, the UK and Italy.

However, organisations face challenges in meeting sustainability requirements due to limited suitable stock and high costs of upgrading older buildings.

# 68%

of organizations globally plan to **increase investment in sustainability performance** in the next five years.



Source: JLL Research, Future of Work 2024



To address these challenges, early planning and integration of sustainability targets in relocation strategies and fit-out projects are crucial. Early engagement with project teams and supply chains is necessary to anticipate hurdles such as extended timeframes for sourcing sustainable materials, opportunities for reusing furniture and installing complex systems to meet environmental targets.

Reinstatement at lease end is gaining focus, with opportunities to incorporate reuse, recycling and social impact into strategies. Reinstatement costs, or dilapidations, describe a tenant's liability for returning premises to the landlord. These requirements can impact sustainability outcomes and are an often-overlooked aspect of a fit-out's whole-life impact.

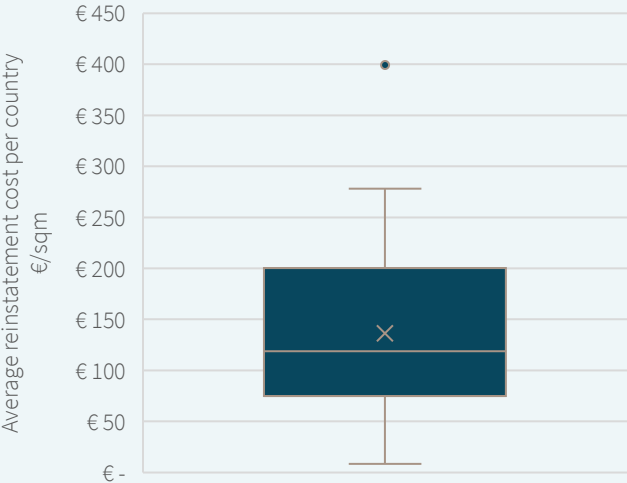
Reinstatement responsibilities vary between landlord and tenant, depending on local requirements and lease agreements.

This provides different options for circularity at lease end or office end-of-life. In Nordic countries, occupiers are typically only responsible for furniture removal, allowing landlords to reuse carbon-intensive elements like partitions and flooring over multiple tenancies. Elsewhere, tenants often undertake extensive fit-outs but must return the office to its original state upon leaving. This presents opportunities for increased landlord-tenant collaboration to support sustainable reinstatement approaches.

While tenants benefit from office remodelling to suit their needs and branding, designing with circularity is critical. This involves considering products and materials that can be recycled, reused or donated at end-of-life, supporting a more sustainable approach to workplace design and management.

Average cost for reinstatement EMEA

€136 / sqm



Source: JLL Research. Note: All costs shown in Euro.

Average cost for reinstatement varies across EMEA depending on lease agreement and local practices. Graph represents range of average costs across EMEA, boxes showing upper and lower quartile.



# Outlook for the year ahead



# Methodology





# Methodology

Our EMEA Fit-Out Cost guide provides insights into costs associated with fitting out office space across 40 countries. Our methodology uses a standardised office layout and JLL design standards, which is costed by local experts in each market, to assess comparable costs across regions using a like-for-like project comparison.

The project uses a typical open office layout designed to accommodate hybrid working, with a range of individual and collaborative work settings. The specifications priced draw on JLL's best-in-class offices around the globe and assume cost for a Central Business District location.

The report captures market-specific costs for a modern corporate standard of Fit-out, in accordance with the respective suppliers in their markets. The figures within this report are reflective of analysis conducted in Q1 2025.

## JLL offices, global design standards



LaSalle, London, UK  
Project Design: JLL Design



JLL Rue Montoyer, Brussels, Belgium  
Project Design: JLL Design



JLL Wellington Place, Leeds, UK  
Project Design: JLL Design



JLL One Centenary Way, Birmingham, UK  
Project Design: JLL Design

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## Research at JLL

JLL's research team delivers intelligence, analysis and insight through market leading reports and services that illuminate today's commercial real estate dynamics and identify tomorrow's challenges and opportunities. Our more than 550 global research professionals track and analyze economic and property trends and forecast future conditions in over 60 countries, producing unrivalled local and global perspectives. Our research and expertise, fueled by real-time information and innovative thinking around the world, creates a competitive advantage for our clients and drives successful strategies and optimal real estate decisions.

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