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Adaptive Spaces

# India Office Occupier Survey 2026:

## How is AI Influencing Leasing Decisions?

CBRE RESEARCH | AUGUST 2026

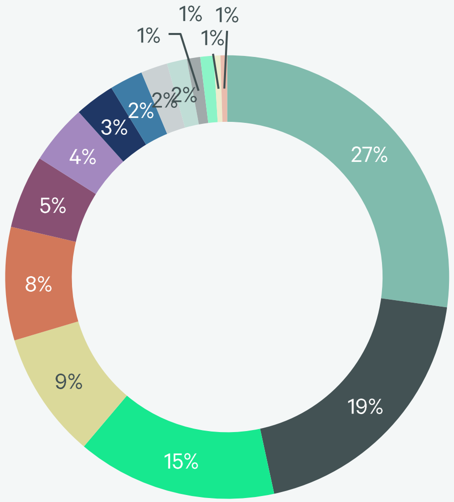
CBRE

# Contents

# 2026 India Office Occupier Survey Respondent Profile

Conducted between April and June 2026, the eighth edition of the India Office Occupier Survey gathered responses from over 200 CXOs overseeing diversified organisational portfolios across multiple Indian markets, offering valuable insights into occupier strategies, workplace priorities, and real estate decisions.

## TENANT SECTOR




- Technology
- BFSI
- E&M
- Life Sciences
- RCA
- IRL
- Automotive
- Media & Marketing
- Education
- FMCG & Retail
- Others
- Hospitality
- Telecommunication
- Aviation
- E-commerce

Note: BFSI – banking, financial services, insurance; E&M – engineering & manufacturing; RCA – research, consulting & analytics; IRL – infrastructure, real estate & logistics

## REGION OF ORIGIN

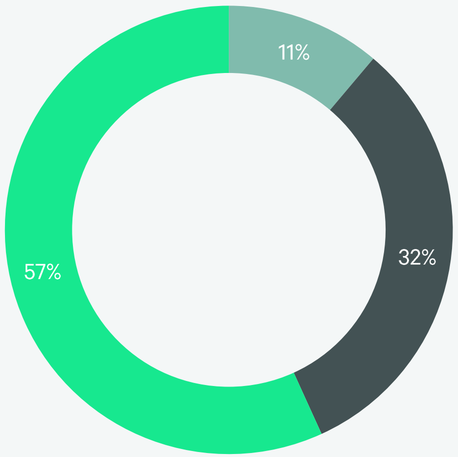
39%
AMERICAS

28%
EMEA

25%
DOMESTIC

8%
APAC

## PORTFOLIO SIZE




- Large (more than 1 mn sq. ft.)
- Medium (100,000 sq. ft to 1 mn sq. ft.)
- Small (less than 100,000 sq. ft.)

## TYPE OF OPERATIONS

50%
GCCs

50%
NON-GCCs

Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026

# Survey Summary

# Office Demand Remains Strong Even as Occupiers Embrace AI

Key Insights from the 2026 India Office Occupier Survey

## Office presence remains robust

**77%** of respondents report office utilisation rates of above 50%

## Strategic location matters most

**47%** prefer core / established micro-markets

## Access to commute drives preference

**70%** prioritize commute infrastructure while selecting offices

**95%** view 'traffic congestion and commute' as a threat to operations and employee experience

**66%** report 'public transit access and last-mile connectivity' as infrastructure concerns

## Top cities retain their appeal

**85%** are present in or considering expansion to Bengaluru, Pune or Hyderabad

**65%** consider emerging and untapped talent pools as a key criteria while evaluating Tier II/III cities

## Workplace expansion accelerates

**77%** expect their India office portfolio to grow over two years

**67%** expect flex to be a part of their portfolio within two years

## AI: From experimentation to adoption

**93%** report some stage of artificial intelligence (AI) adoption in their firm

**64%** maintain a neutral-to-positive view of AI's effect on their workforce

**57%** report no impact on firm's leasing due to AI

## Partnering for safer workplaces

**75%** want developer support to strengthen safety and security

## Embedding sustainability into strategy

**52%** have defined ESG goals for real estate

**38%** would exit/reject/seek discounts on buildings lacking public transit access

# *Analysis of Responses of GCC Occupiers*

## Office-first and at capacity

**83%** of GCC respondents report office utilisation rates of above 50%

## AI moves from pilot to premise

**95%** report some stage of AI adoption

## Commute and talent lead site choice

**72%** prioritize commute infrastructure when selecting offices

**95%** view traffic congestion & commute as a threat to operations and employee experience

**68%** prioritize access to talent when selecting offices

## Primed for conventional office and flex portfolio growth

**75%** expect their India office portfolio to grow over two years

**65%** expect flex to be a part of their portfolio within two years

## Creating experience-led workspaces

**68%** want developer support on employee experience

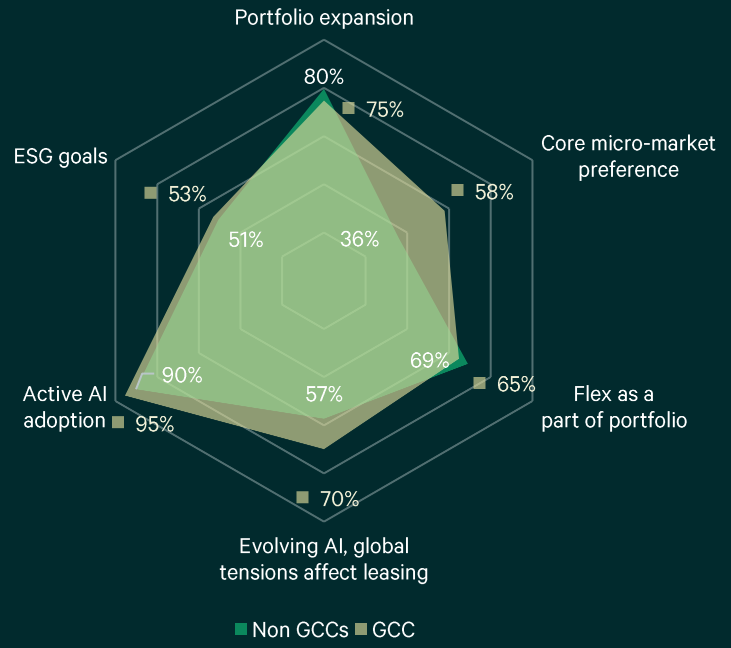
## Expanding the sustainability agenda

**53%** have defined ESG goals for real estate

**17%** would consider paying premium for buildings with public transit access

## The GCC Perspective: 2026 India Office Occupier Survey

### Comparing Priorities – GCCs vs Non GCCs




While real estate priorities are broadly consistent across GCCs and other entities, the former exhibit greater sensitivity to emerging market dynamics influencing leasing strategies—such as the potential implications of AI-driven workforce transformation and global uncertainties. These occupier groups also show a divergence when it comes to choice of location: GCCs demonstrate a stronger preference for core locations, emphasising on commute optimisation and ready infrastructure as levers for attracting and retaining top talent.

01

# Introduction

# *India's High-growth Office Grid*

India's office sector stands at a historic inflection point. The market has consistently set new benchmarks, recording heightened leasing activity over the past two-and-a-half years, with office stock surpassing the 1 billion sq. ft. milestone during April-June (Q2) 2026. Notably, this momentum has unfolded amid intensifying global uncertainties and the transformative influence of AI.

Furthermore, the strategic importance of the physical workplace has never been more firmly established. With 77% of surveyed occupiers reporting office utilisation rates well above the 50% mark, the workplace remains the definitive foundation for corporate culture, collaboration, and productivity.

Now in its eighth edition, the ***CBRE India Office Occupier Survey 2026*** examines how corporate occupiers are navigating the complex intersection of workforce management, emerging technologies, and long-term CRE portfolio strategies. The following sections unpack these insights, illustrating how corporate conviction is translating into strategic real estate mandate.

*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*


02

# Portfolio Strategies:

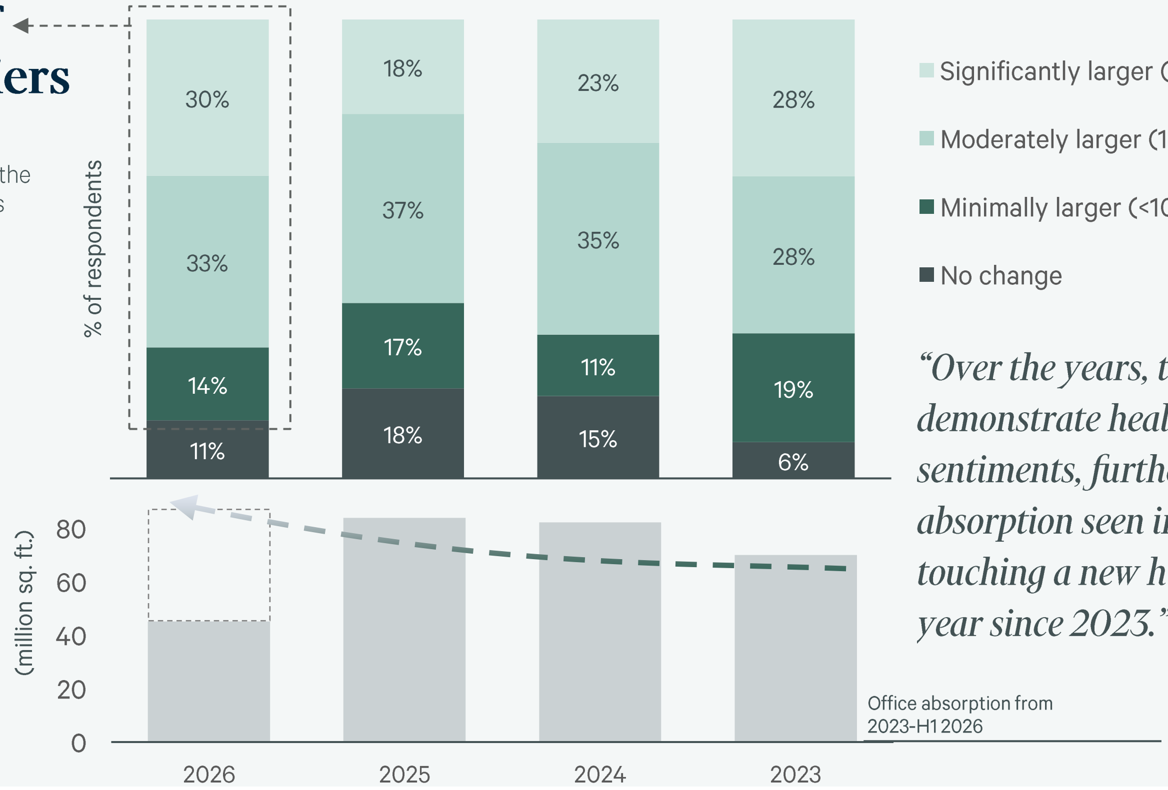
## Expansionary Sentiments and AI Adoption

# Three in Four Occupiers Signal Office Portfolio Expansion in India

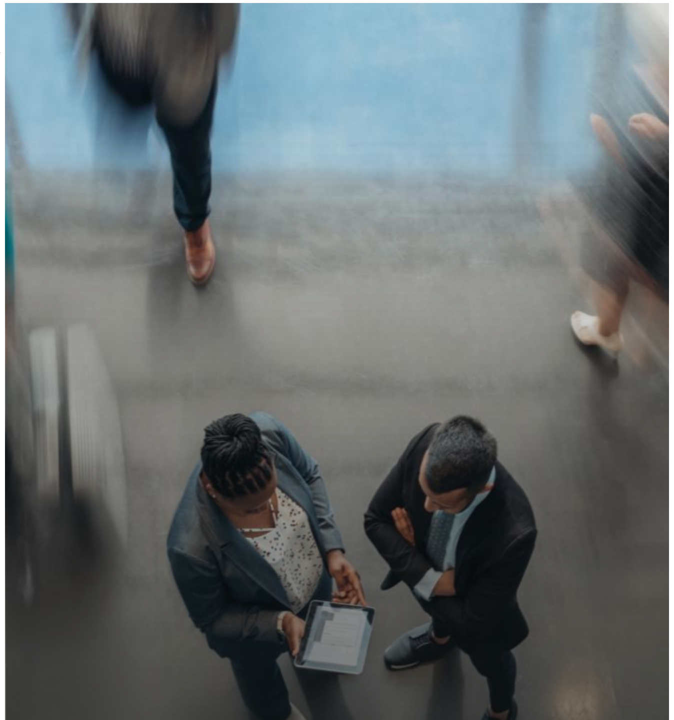
Demonstrating strong conviction in sustained business growth and the enduring relevance of the physical workplace, the share of corporate occupiers pursuing an aggressive expansion strategy has nearly doubled in 2026 from the previous year, with 30% of firms targeting a significantly larger office footprint over the next two years. This momentum coincides with a period in which India's commercial real estate sector continues to witness robust absorption, navigating geopolitical uncertainties and structural shifts driven by AI.

FIGURE 2.1: Which of the following options best describes the long-term expectations of your total office portfolio over the next two years?

**77% of occupiers** expect their portfolio to increase over the next two years




*"Over the years, the survey continues to demonstrate healthy expansionary sentiments, further corroborated by the absorption seen in the Indian market—touching a new high each consecutive year since 2023."*



**Portfolio expansion intentions as per surveys in different regions**

| 77% | 38% | 45% |
|---|---|---|
| INDIA SURVEY 2026 | AMERICAS SURVEY 2026 | APAC SURVEY 2026* |

*Portfolio growth plans remain **strongest** among respondents in the India survey*

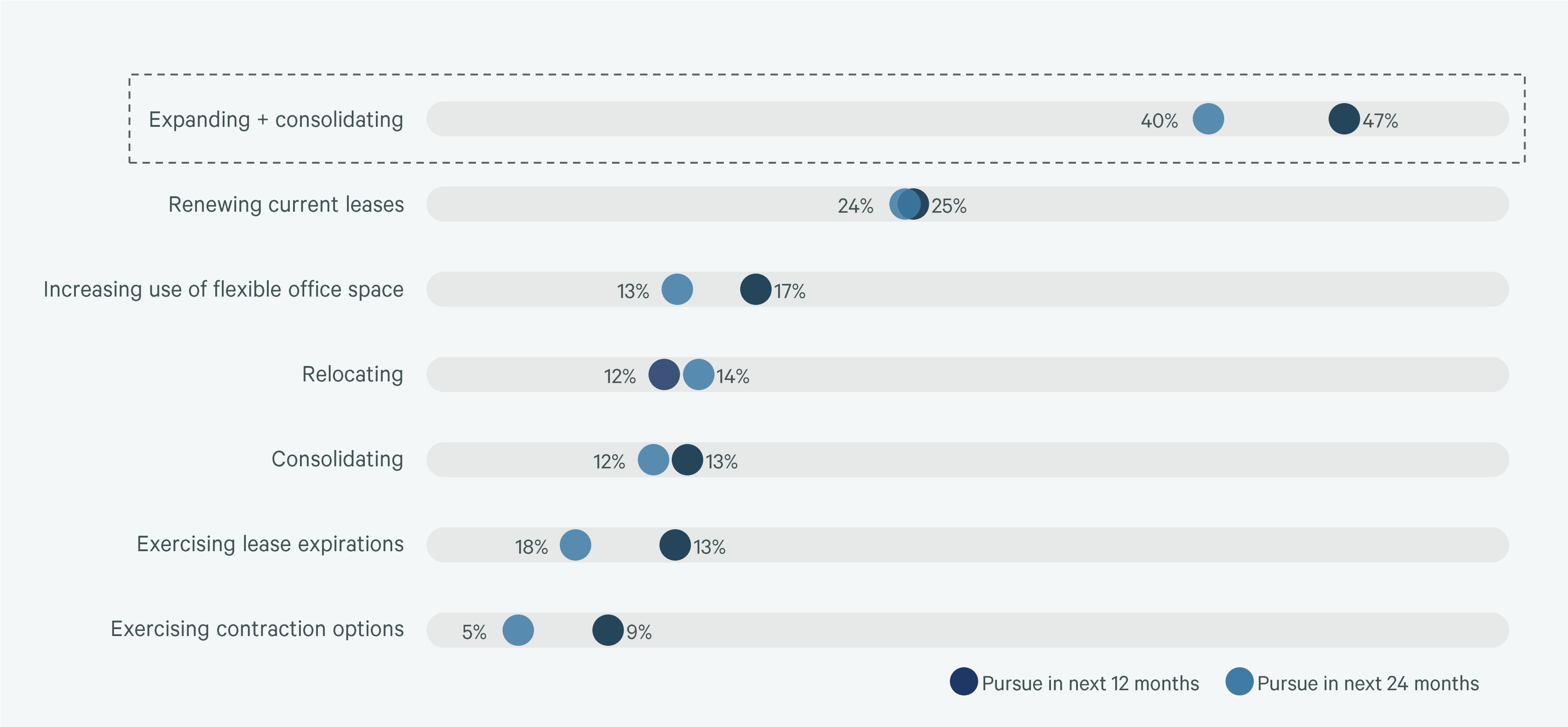
Source: CBRE's 2026 India Office Occupier Survey; CBRE's 2025 India Office Occupier Survey; CBRE's 2024 India Office Occupier Survey; CBRE's 2026 Americas Office Occupier Sentiment Survey; CBRE Research, Q3 2026

Note: This was a single choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations. The above chart displays only positive and neutral responses. Categories with negligible responses have been excluded; therefore, percentages may not total 100%. * Results from CBRE's APAC Occupier Survey was yet to be published at the time of the release of this report, and hence is subject to changes

# *One in Two Occupiers are Focussed on Expansion & Consolidation Strategies*

Portfolio strategies are gravitating towards structural expansion and retention. Nearly half of the surveyed occupiers plan to expand their real estate footprint by coupling business growth with expansion and consolidation. Concurrently, approximately a quarter of occupiers intend to renew existing leases over the next two years. This dual dynamic reflects a strategic balance: while growth-oriented occupiers leverage expansion to upgrade quality, others are planning to execute renewals to preserve business continuity and lock in quality space amidst tightening supply of prime inventory.

FIGURE 2.2: Which leasing / portfolio strategies are you planning to pursue over the next 12 to 24 months?




**63%**

of large-sized firms plan to expand + consolidate in the next 24 months

**~30%**

of large and medium-sized firms plan to renew current leases in the next 24 months

**55%**

cite flight to quality relocation / upgrading to higher quality buildings as their primary relocation strategy, driven by better lease terms / rent and suitable commute

*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

# 2.1 Occupiers' Feedback:

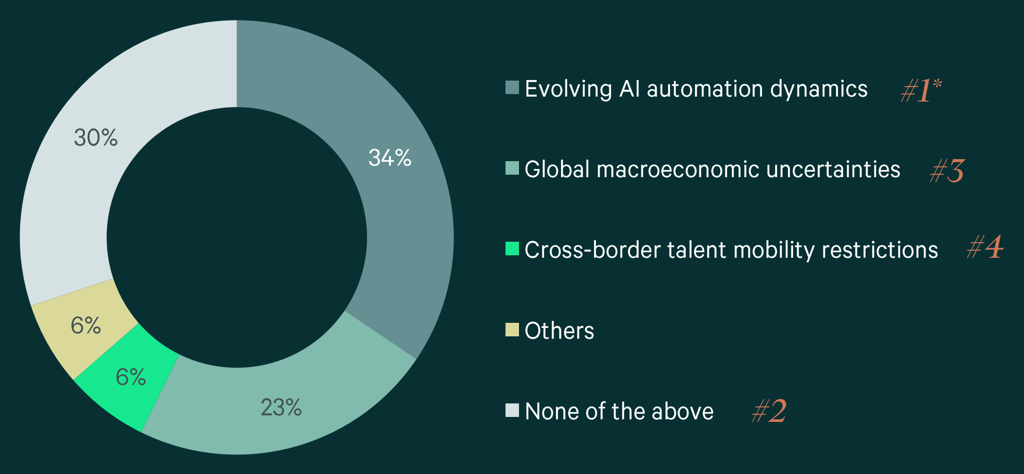
## AI Adoption & Impact

# *AI Surpasses Macroeconomic Concerns as the Primary Focus of Leasing Operations*

A sizeable share of occupiers indicate that evolving AI automation dynamics will directly shape their leasing decisions over the coming 12-24 months. As organisations integrate AI into their operating models, they are reconfiguring workplaces to support new talent requirements, redesigned workflows, and greater automation.

While global macroeconomic uncertainty remains an important consideration, it now plays a secondary role to technological transformation. At the same time, India's value proposition—anchored in talent availability and scale, cost competitiveness, and a supportive business environment—continues to underpin occupier confidence. This is further corroborated by almost 30% of occupiers indicating that none of the external factors are likely to influence leasing decisions.

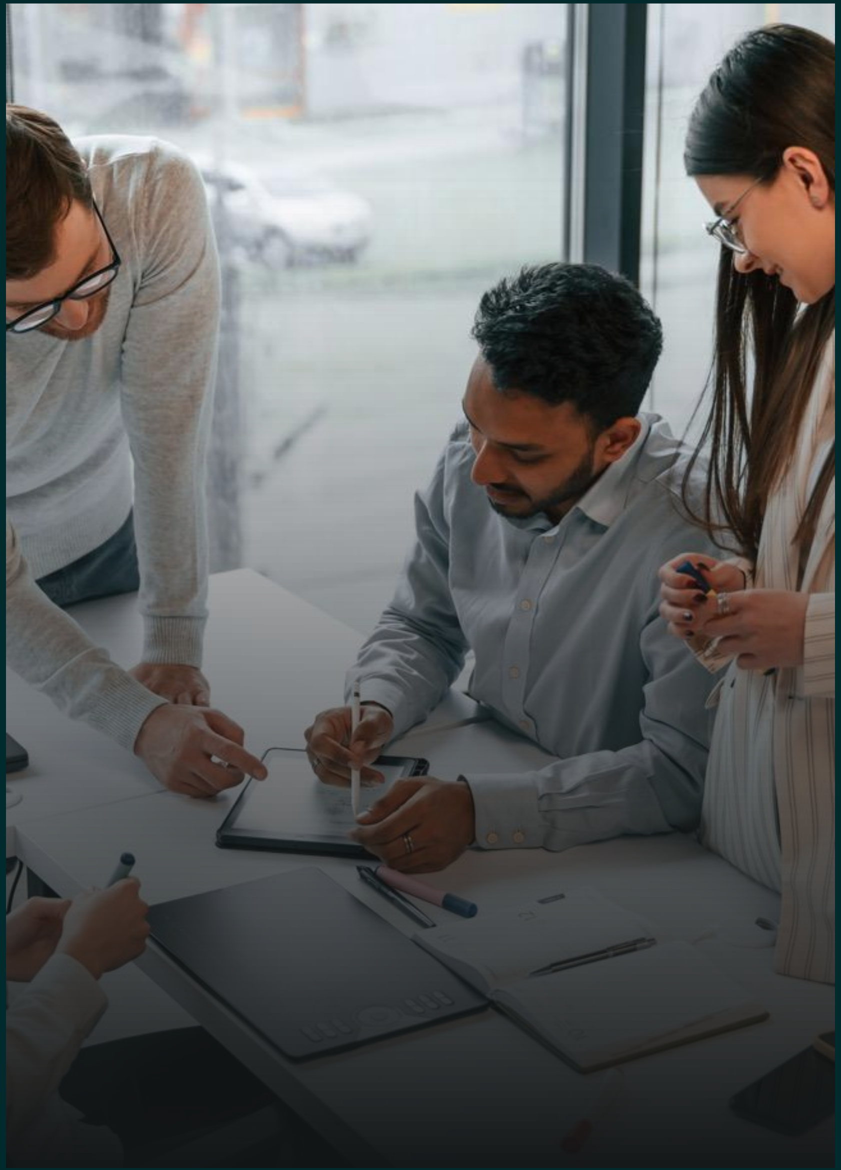
FIGURE 2.3: Which of the following would affect your leasing decisions in the next 12-24 months?




** indicates the ranking of each factor based on the no. of respondents selecting it*

*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

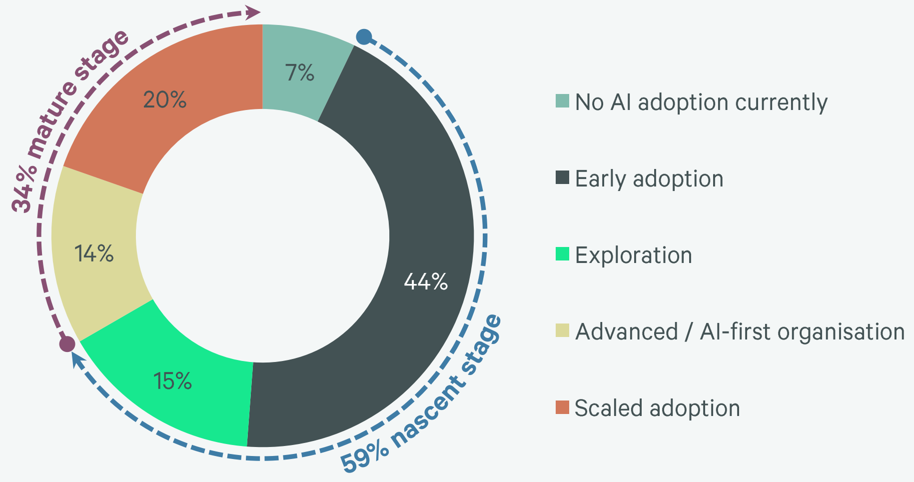
Note: This was a single choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.



# *AI Adoption Moves Mainstream, but Most Occupiers Remain in Early Stages*

While firms are actively adopting AI, almost 60% of respondents are experimenting or are in early stages of deployment, indicating that they are laying down the foundation—testing proof-of-concepts and mapping out systemic changes before fully committing capital and restructuring physical assets. For a third of the cohort, AI is no longer a future roadmap item but an active operational reality, driving immediate changes in how talent is deployed and physical workspaces are utilised. **Technology firms and BFSI occupiers lead the charge in AI adoption**, led by their data-intensive business models and customer-centric digital products and services.

FIGURE 2.4: Which of the following best describes your organisation's current stage of AI adoption?



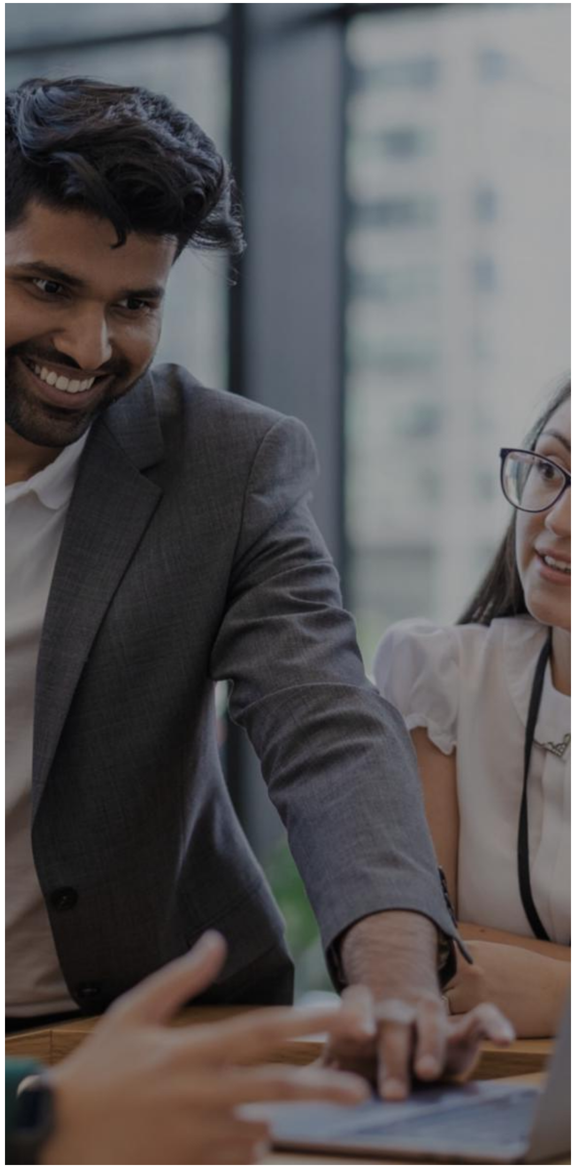

**64%**

of GCC respondents are at an early / exploratory stage of AI adoption while 31% are in an advanced or scaled stage

*"About 53% of the large firms are at a scaled/advanced stage of AI adoption, as their pace is backed by substantial capital allocation, existing cloud infrastructure, and an extensive data ecosystem"*

*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a single choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.



# *AI Transformation: Neutral Headcount Signal, Minimal Leasing Disruption*

Although AI is reshaping workforce planning, its immediate influence on leasing activity remains relatively muted. Nearly 60% of occupiers do not expect a meaningful impact on real estate decisions in the near term. Instead, the focus remains firmly on high-quality workplaces that support talent attraction, innovation, and advanced technology requirements, reinforcing the primacy of quality over absolute headcount growth.

FIGURE 2.5: What impact do you foresee AI having on your organisation's headcount over the next two to three years?

**64%**
maintain a neutral-to-positive view of AI's effect on their workforce

- **52%** hold a neutral or wait-and-see position
- **12%** expect AI to grow headcount

FIGURE 2.6: How is AI-driven business transformation influencing your office leasing strategy?

**57%**
No measurable impact on leasing yet

**69%**
of this group are at the no-adoption or nascent stage of AI adoption

> *"A large proportion of organisations are likely to adopt a wait-and-watch approach, with workforce planning and real estate decisions increasingly shaped by the maturity and business impact of their AI strategies."*

*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

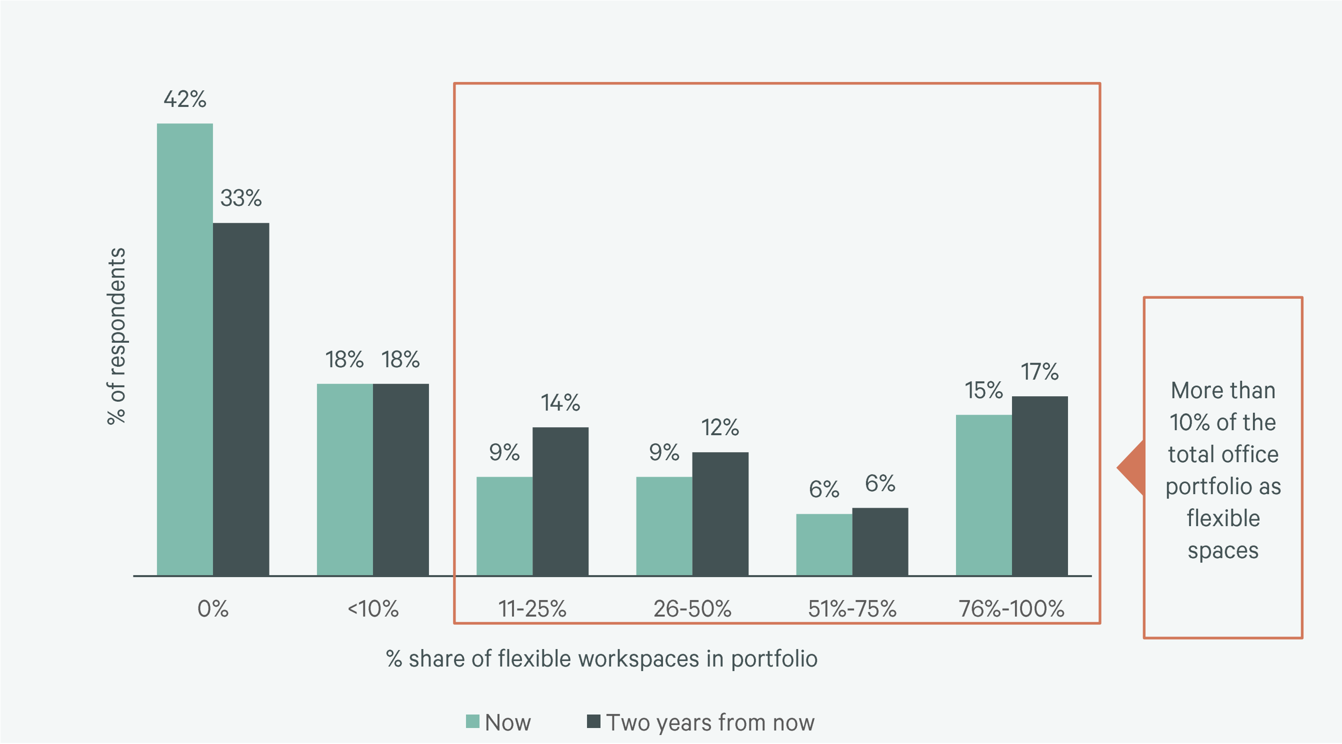
03

# Flexible Workspace Strategies

# *Flexible Workspaces Maintain Strong Market Appeal*

Flexible workspaces are transitioning from interim fixes to strategic enablers, as occupiers increasingly adopt a ‘core + flex’ strategy, navigating risk mitigation, cost management, and evolving workplace expectations. Having consistently contributed more than 15% of annual office leasing volumes, space take-up by flex players achieved a record share of ~25% of total leasing activity in H1 2026, in line with evolving occupier priorities. Reflecting this trend, about 67% of the surveyed occupiers expect to have flexible spaces as part of their portfolio over the next two years.

FIGURE 3.1: What percentage of your portfolio consists of flexible office space (i.e., co-working, managed offices)?




*Source: CBRE’s 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

**67%**

respondents intend to have flex in their portfolio in two years, up from 58% now

**65%**

of GCC respondents intend to have flex in their portfolio in two years, up from 47% now

*“Occupiers continue to adopt a ‘core + flex model’, with occupancy costs and agility being the primary demand drivers for flexible spaces”*

# *Private Managed Offices are the Flex Format of Choice*

Private managed spaces have emerged as the primary flexible solution of choice, as corporate occupiers prioritise dedicated space, custom fit-outs, and brand privacy over shared environments.

**61%**

of large-sized firms choose private managed offices as their preferred flexible space solution

**50%+**

of Technology and E&M companies lean towards flexible workspaces for their GCC teams

FIGURE 3.2: Which of the following flexible office solutions are you interested in using?

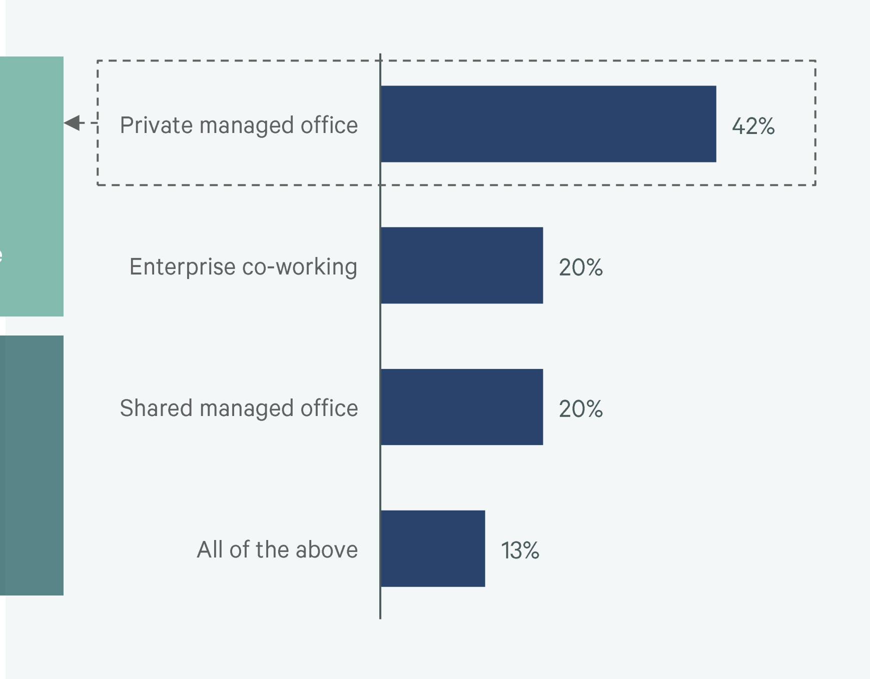
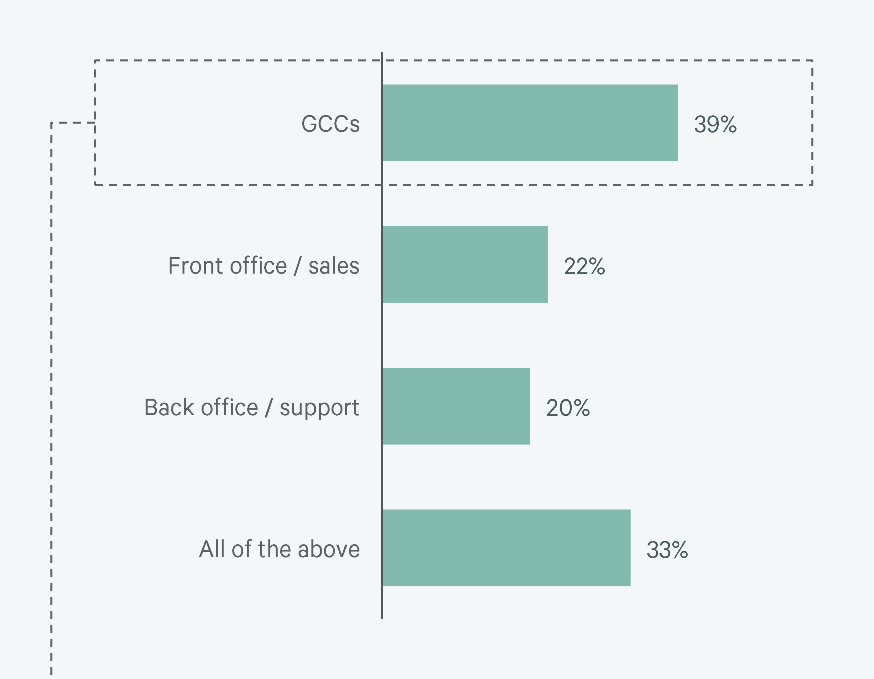



FIGURE 3.3: If you have flexible workspaces as part of your portfolio, which teams operate out of it?




*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

04

# Occupiers' Preferences:

## Sectoral and City Perspectives

# High-growth Sectors Primed for Portfolio Expansion

## FEEDBACK FROM TECHNOLOGY COMPANIES

77%

of surveyed **technology** companies indicate plans to expand their portfolio over the next two years

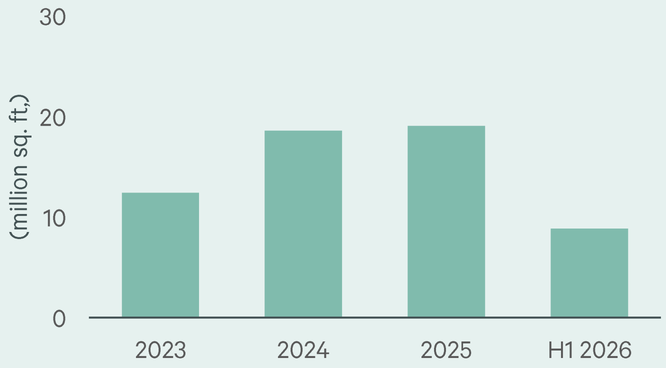
Global firms establishing GCCs in India continue to plan their portfolio expansion. As AI adoption gains traction, 58% of technology firms are actively exploring AI solutions, while 38% have progressed to a stage where AI serves as a critical business enabler. This convergence of GCC-led growth and technology investment is reinforcing expansion plans.

**Primary growth functions in technology firms**

- AI model development
- Cloud and cybersecurity
- SaaS product development
- Digital transformation consulting

**Leasing trends**

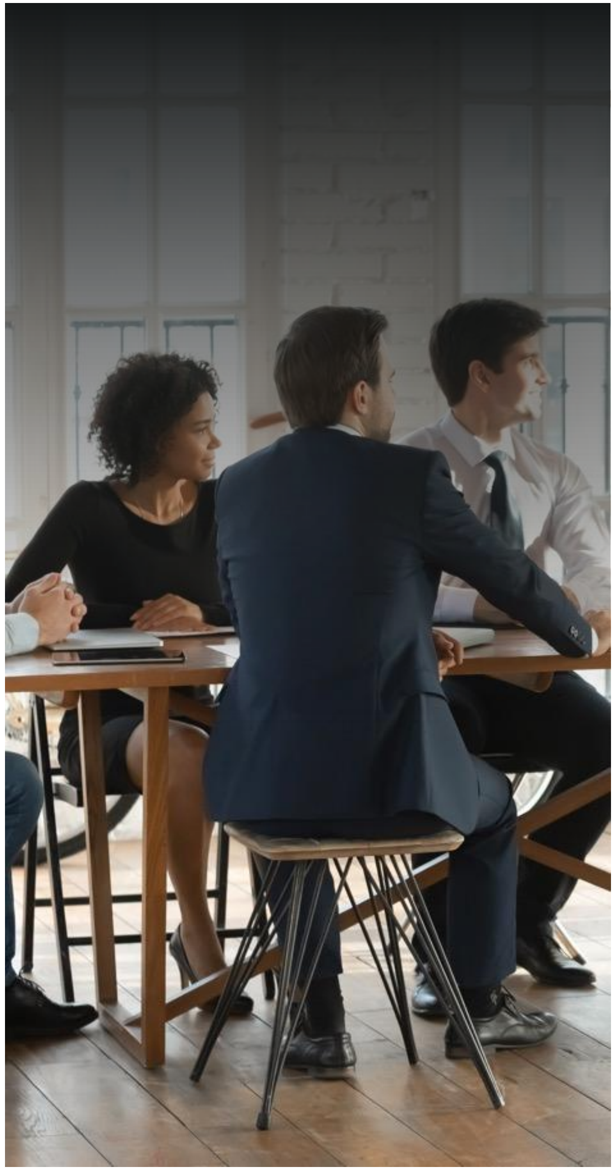
During 2025-H1 2026, technology firms leased ~28 million sq. ft., accounting for 22% of total absorption. The sector has been a key driver of office space take-up, underpinned by sustained expansion of global tech companies and their GCCs, and increasing adoption of AI, cloud computing and digital engineering.




**Sector outlook**

*India's technology industry is on track to double its revenue from 2024 to reach USD 500 billion by 2030, growing at a CAGR of ~11%.*[1]

*The country's IT spending is projected to reach USD 176.3 billion in 2026, up by 10.6% from 2025 and 11.2% from 2024.*[2]



*Source: 1. IT & BPM Industry Report, Indian Brand Equity Foundation, June 2026; 2. Forecast on India's IT spending, Gartner, November 2025; CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a single choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

# *High-growth Sectors Primed for Portfolio Expansion*

## FEEDBACK FROM **BANKING, FINANCIAL SERVICES, INSURANCE (BFSI)** FIRMS

**80%**

of surveyed **BFSI** firms indicate plans to expand their portfolio over the next two years

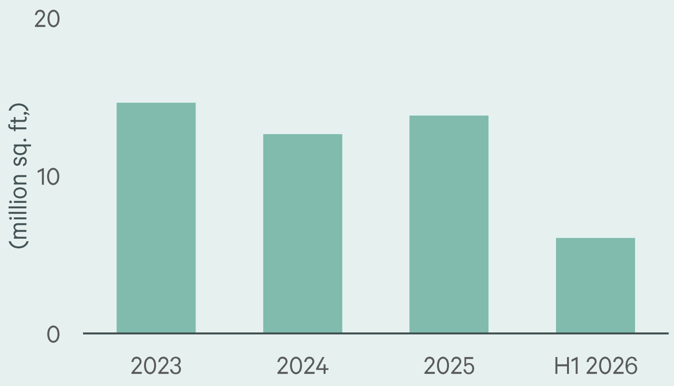
Portfolio expansion is being propelled by global BFSI firms scaling their GCCs to support digital transformation. While nearly 44% of these organisations remain in the early stages of AI adoption, 56% report scaled AI adoption, strengthening confidence in future growth and supporting expansion plans.

**Primary growth functions in BFSI firms**

- Risk & compliance
- Fraud analytics
- Digital banking
- Customer experience

**Leasing trends**

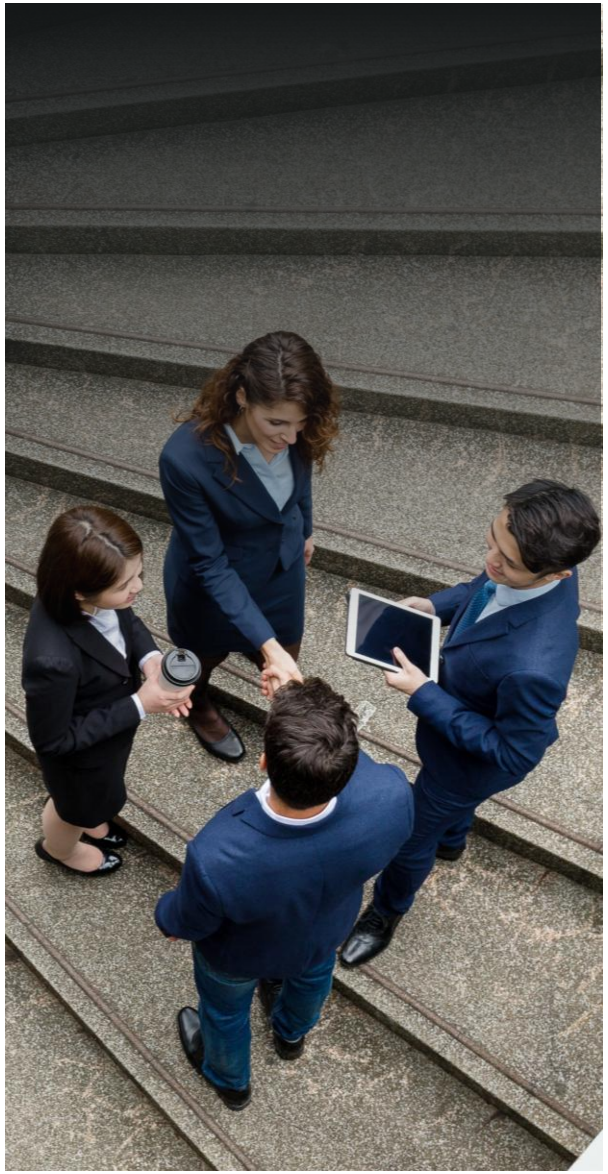
During 2025-H1 2026, BFSI firms leased ~20 million sq. ft., accounting for 15% of total absorption. The sector remained a key demand driver, supported by the continued expansion of domestic financial institutions, multinational banks, insurance companies, fintech firms, as well as GCCs




**Sector outlook**

*The value of the country's BFSI GCC sector is projected to increase three-fold, reaching USD 125–135 billion by 2032 from USD 40 billion in 2023.*[1]

*The Indian FinTech sector, valued at USD 51.3 billion in 2026, is projected to reach USD 109 billion by 2031, growing at a CAGR of 16.3%.*[2]



*Source: 1. BFSI GCC Talent Report, Quess Corp, August 2025; 2. Forecast on India's fintech market, Mordor Intelligence, July 2026; CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a single choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

# *Other Key Sectors Also Positioned for Portfolio Expansion*

## FEEDBACK FROM **ENGINEERING & MANUFACTURING (E&M)** FIRMS

83%

of surveyed **E&M** firms indicate plans to expand their portfolio over the next two years

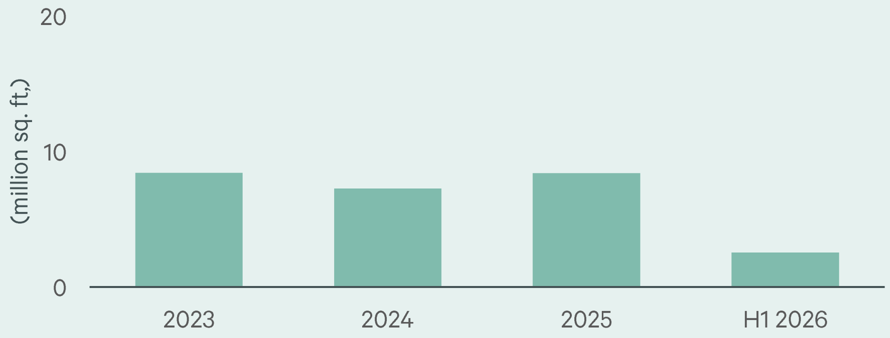
The inclination to expand portfolios is primarily driven by global E&M firms, with nearly 70% of these organisations in the process of early AI adoption, and around 19% scaling their AI operations to support their digital transformation. This points to continued expansion by such firms for their GCC operations.

**Primary growth functions in E&M firms**

- Product design and digital engineering
- Testing and validation
- Chip design

**Leasing trend**

During 2025-H1 2026, E&M firms leased about 11 million sq. ft., accounting for 8% of total absorption.




**Sector outlook**

*India's ER&D services market, valued at USD 133.71 billion in 2025, is projected to reach USD 238.63 billion by 2031 (~10% CAGR).*[1]

*Under the National Mission on Manufacturing (NMM), the country aims to raise manufacturing's share of GDP from 13% in 2023 to 25% by 2035, with the potential to create over 143 million jobs.*[2]

## Perspectives from other Key Sectors

### RESEARCH, CONSULTING & ANALYTICS (RCA)

82%

of surveyed **RCA** firms indicate portfolio expansion over the next two years

During 2025-H1 2026, RCA firms leased ~13 million sq. ft, accounting for 10% of total absorption.

**Sector outlook**

*The Indian management consulting sector is projected to reach USD 17 billion by 2031 from USD 8.2 billion in 2025 (CAGR of 12.7%).*[3]

### LIFE SCIENCES (LS)

68%

of surveyed **life sciences** firms indicate portfolio expansion over the next two years

During 2025-H1 2026, LS firms leased ~5 million sq. ft, accounting for 4% of total absorption.

**Sector outlook**

*The domestic pharmaceutical market is projected to more than double from 2025 levels, reaching USD 130 billion by 2030.*[4]

*Source: 1. IT & BPM Industry Report, Indian Brand Equity Foundation, June 2026; 2. Forecast on India's IT spending, Gartner, November 2025; 3. Forecast on India's fintech market, Mordor Intelligence, July 2026; 4. BFSI GCC Talent Report, Quess Corp, August 2025; CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a single choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

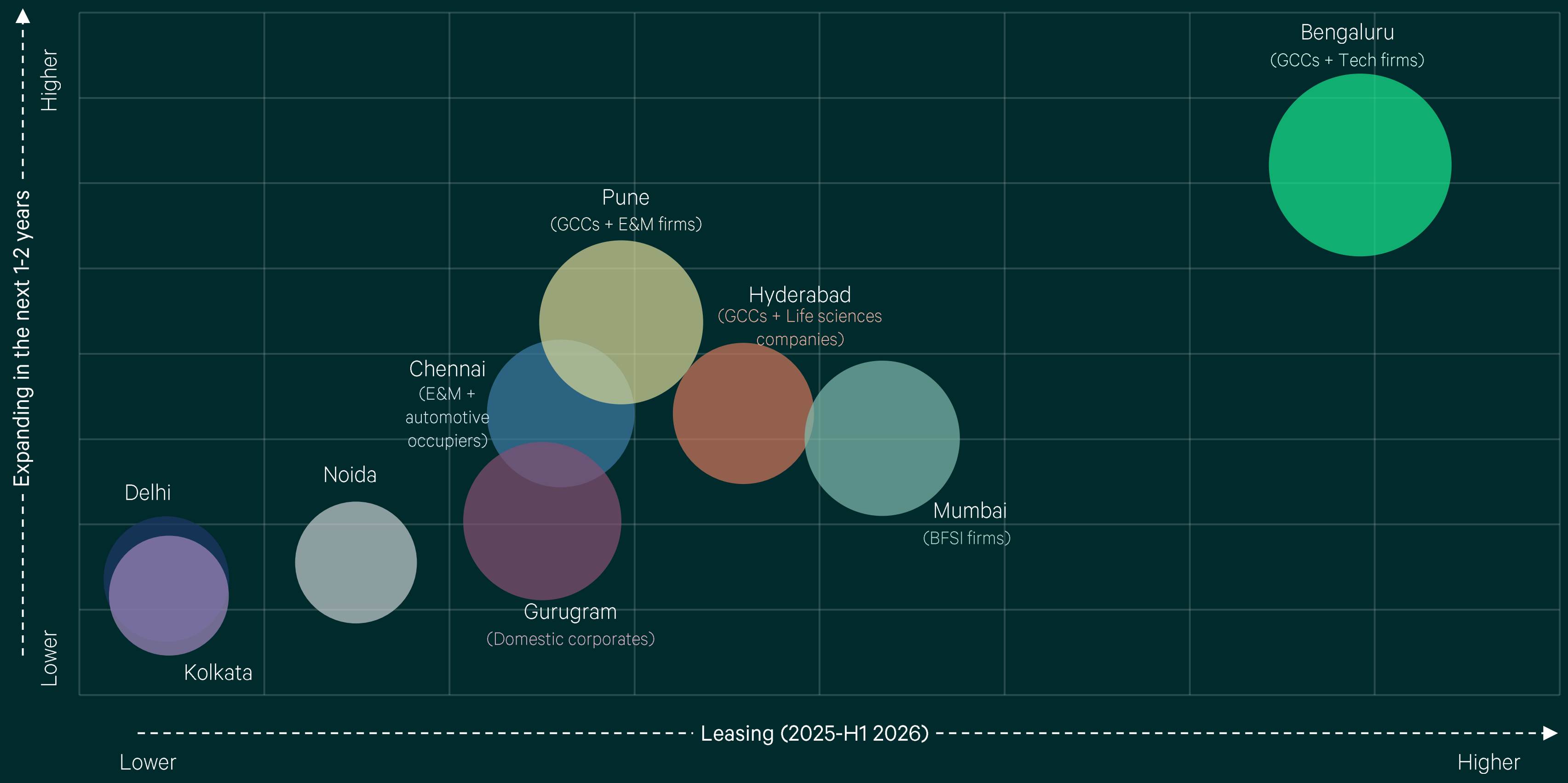
# *Multi-city Expansion Becomes the Norm, but Location Playbooks Diverge*

While expansion intent continues to be broad-based, demand is not concentrated in a single location. GCCs and Indian companies are pursuing distinctly different geographic strategies, resulting in varied city preferences. While GCCs typically deepen their presence across a select group of established hubs, domestic firms are pursuing a wider geographic footprint across multiple markets.

With multi-city expansion now the norm, almost half of the surveyed occupiers plan to expand into two or more cities, and a further 22% in three or more locations. The southern cities of Bengaluru, Hyderabad and Chennai, along with Pune, continue to attract large-scale requirements, with each of these cities recording a higher share of occupiers than the market average.

*"Bengaluru stands apart as the most widely preferred destination, with 66% of occupiers either already operating in the city or planning to expand there, reflecting its broad appeal across occupier segments rather than demand from any single industry."*

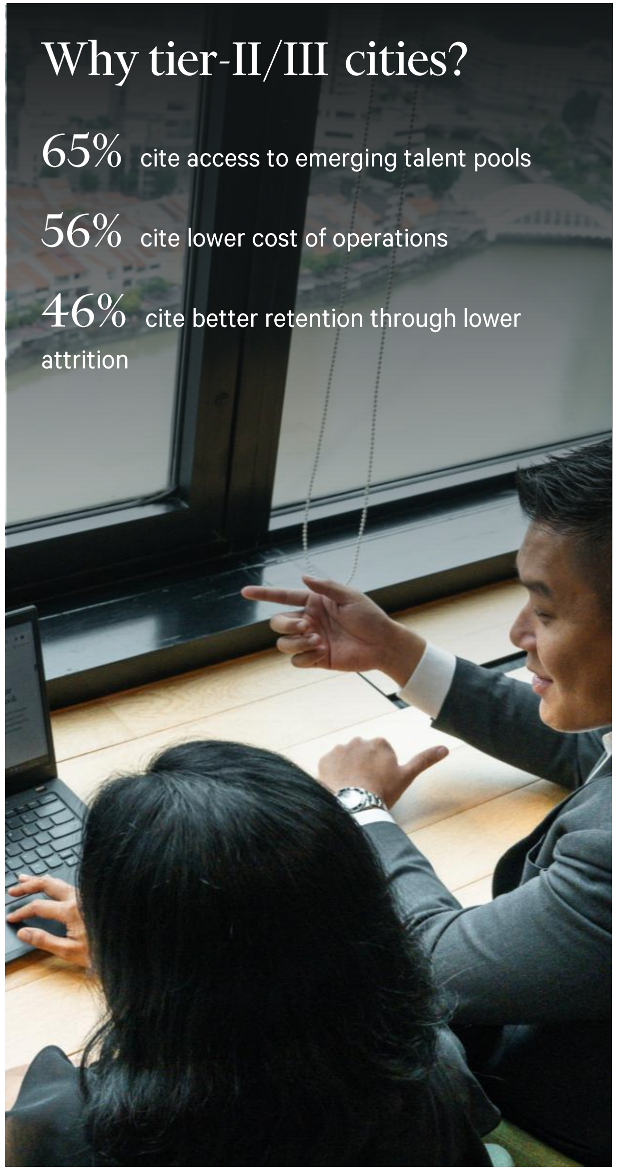
**FIGURE 4.1:** In terms of tier-I locations, what would be your firm's medium to long-term expansion strategy?




*The size of each bubble is proportional to the share of respondents with an existing operational footprint in the respective city*

*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.



## Why tier-II/III cities?

**65%** cite access to emerging talent pools

**56%** cite lower cost of operations

**46%** cite better retention through lower attrition

# Tier-II interest is Real but Selective

Occupiers are selectively expanding into tier-II markets where access to skilled talent, lower operating costs, and stronger workforce stability create a compelling growth proposition.

RCA firms are at the forefront of this trend, driven by delivery and analytics functions that can operate effectively outside traditional metropolitan hubs. Among domestic occupiers which have shown the highest propensity to expand in such locations, BFSI and technology companies remain particularly active, as customer-facing and distributed operating models enable business growth across multiple locations.

FIGURE 4.2: In terms of tier-II/III locations, what would be your firm's medium to long-term expansion strategy?

**58%**

**COIMBATORE**

A rising GCC frontier in South India, especially for core industrial and product engineering R&D, supported by the city's manufacturing legacy and engineering talent base

*Tech workforce: 75,000-85,000[1]*

**54%**

**AHMEDABAD**

GIFT City has positioned Ahmedabad as a leading BFSI, fintech, capital markets, and financial services GCC hub, with 100,000+ jobs projected by 2030[2]

*Tech workforce: 90,000-100,000[1]*

**44%**

**KOCHI**

Strong talent pipeline and availability of skilled digital professionals; emerging digital, cloud, and fintech engineering capabilities

*Tech workforce: 40,000-50,000[1]*

**42%**

**JAIPUR**

A hub for back-office and customer support with its improving connectivity and talent base

*Tech workforce: 85,000-95,000[1]*

**38%**

**VISAKHAPATNAM**

State IT incentives, rapid infrastructure upgrades, steady stream of tech talent. Over 6GW of AI data centre capacity projected to be added by 2030, aiming to transform the city into a digital powerhouse.

*Tech workforce: 50,000-60,000[1]*

**29%**

**INDORE**

Strong talent pipeline and skilled digital professionals from institutions such as IIT, IIM; Strategic location and lower operating costs

*Tech workforce: 65,000-70,000[1]*

*Source: 1. Reimagining Tamil Nadu, State Planning Commission, Govt. of Tamil Nadu, June 2025; 2. Govt. of Gujarat; CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

4.1

# Occupiers' Preferences:

## Commute & Infrastructure

# *Commute Infrastructure Remains the Deal-maker*

As occupiers seek a highly specialised workforce, the realities of a large and hybrid workforce are reshaping location decisions. What was once viewed as a convenience has become a strategic imperative, with commute infrastructure playing a critical role in attracting and retaining talent.

Occupiers are prioritising locations that improve employee accessibility, strengthen talent reach, and support long-term workforce sustainability, thereby elevating transit connectivity to a key differentiator in real estate decision-making.

FIGURE 4.3: What are your top three most crucial criteria while considering office space within the chosen city?

70% Commute / connectivity

56% Talent accessibility

35% Asset quality & workplace experience

30% Existing rentals and escalation

24% Asset stature (part of integrated tech park/campus)

23% Asset safety/ security (certifications, tiered security systems)

22% Proximity to industry-peers/ industry-sector ecosystem

12% Presence of ancillary/ F&B, retail outlets

*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

# *Occupiers Prioritise Asset Quality Without Compromising on Location*

Occupiers continue to prioritise investment-grade workplaces, despite tightening availability across key office markets. Nearly 40% report concerns around securing high-quality, well-located spaces, while 55% of organisations considering relocation are actively targeting superior assets to enhance employee experience and support future growth.

FIGURE 4.4: Are you concerned about availability of space over the next three years, i.e., 2026-2028?

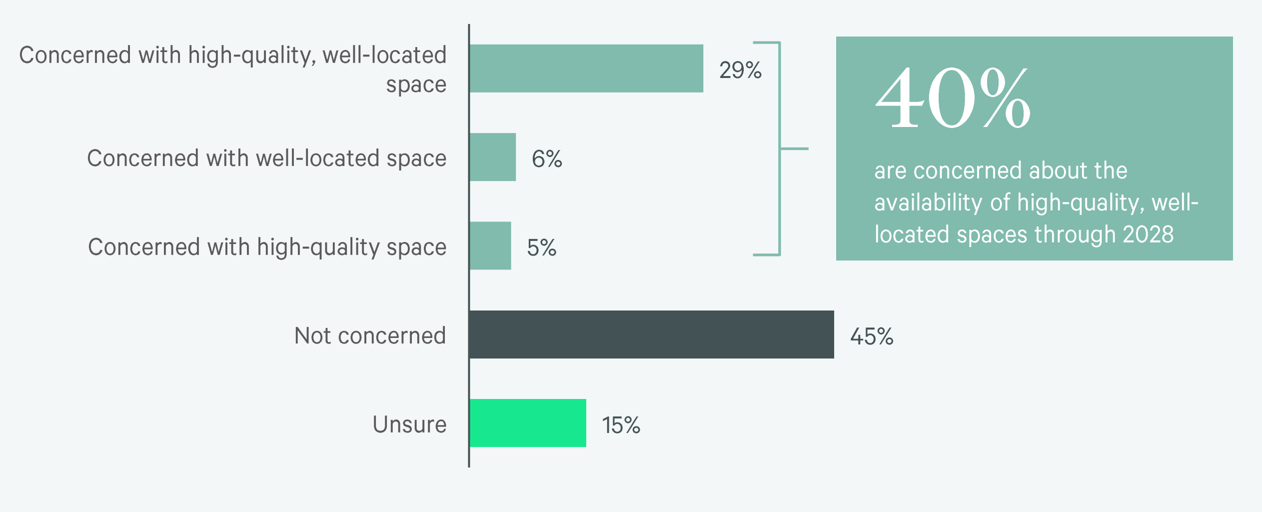
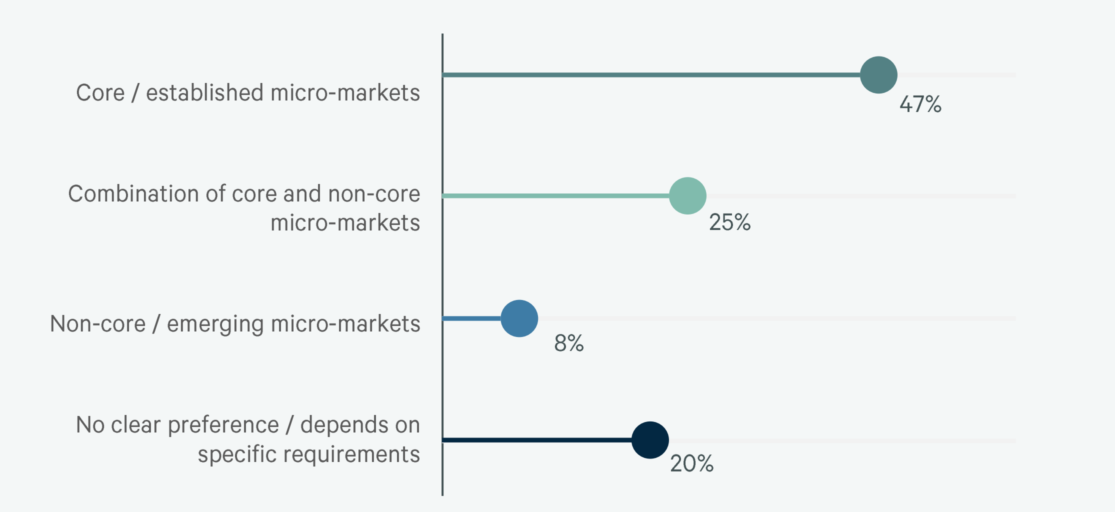



FIGURE 4.5: When selecting a micro-market for a new office location, what is your organisation's preferred approach?




Market Activity Reinforces the Flight-to-Quality Trend

**41%**
of all office leasing in 2025-H1 2026 occurred in investment-grade assets

**61%**
of all office leasing in 2025-H1 2026 occurred in core micro-markets

**46%**
of leasing transactions in core micro-markets during 2025-H1 2026 were concentrated in investment-grade buildings

**57%**
of new completions in core micro-markets during 2025-H1 2026 were investment-grade assets

*"Location decisions continue to favour established micro-markets, with almost half of occupiers preferring core precincts. The confluence of mature infrastructure, deep talent catchments, and strong multimodal connectivity continue to influence occupiers' location strategy, outweighing pure cost advantages."*

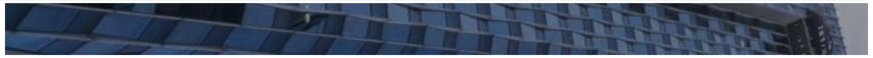
*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a single choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

# Driving Growth Through Expanding Infrastructure

*“Focussed infrastructure initiatives by state governments are transforming urban ecosystems and laying the foundation to catalyse future growth"*

| City | Road infrastructure (improvement/ expansion) | Metro, Regional, Suburban rail (upcoming/ expansion) | Airport connectivity (existing/ upcoming/ expansion) | Major projects | Key commercial districts to benefit |
|---|---|---|---|---|---|
| **Bengaluru** | ✓ | ✓ | ✓ | • Upcoming metro lines: Blue Line (Silk Board-Airport) and Pink Line (Kalena Agrahara-Nagawara) to be operational by 2027; Orange Line (JP Nagar 4th Phase-Kempapura) along the western ORR expected to be operational by 2031<br>• Kempegowda International Airport: Phase 2 of expansion of Terminal 2 ongoing, targeted to be ready by 2029<br>• Bengaluru Business Corridor-Tumakuru to Bellari road stretch to become operational by 2027 | Outer Ring road, Central Bengaluru, North Bengaluru, Dairy Circle, and South Bengaluru |
| **Mumbai** | ✓ | ✓ | ✓ | • Upcoming metros lines: 2B (DN Nagar–Mandale), Line 4 (Wadala–Kasarvadavali) and Line 6 (Lokhandwala–Vikhroli) expected to be fully operational by 2027<br>• Navi Mumbai International Airport: Phase 1 complete, to be fully operational by 2035-40<br>• Goregaon-Mulund Link Road (GMLR) & Thane-Borivali Twin Tunnel Corridor connecting Western Express Highway to Eastern Express Highway expected to be completed by 2028<br>• Coastal Road Phase-2 (Bandra-Versova Sea Link) to be completed by 2028 | Worli, BKC, Goregaon, Malad, Powai, Navi Mumbai, and Thane |
| **Delhi-NCR** | ✓ | ✓ | ✓ | • Upcoming metro lines: New GMRL loop (Millennium City Centre-Cyber City) to be operational by 2029; Golden Line (Aerocity-Tughlakabad) to be operational by 2027; Magenta Line ext. (Janakpuri West-RK Ashram Marg) to be operational by 2027<br>• Noida International Airport (Jewar): International operations expected to begin by the end of 2026<br>• Road infrastructure: Barapullah Elevated Road ext., Gurgaon-Pataudi-Rewari Expressway, Extended Golf Course Road revamp, Southern Peripheral Road elevated corridor, Gaur Chowk underpass (Greater Noida), and the proposed Yamuna Pushta elevated expressway (high-speed bypass link to Noida International Airport) | Aerocity, Old Gurgaon, Southern Peripheral Road, Extended Golf Course Road, Noida-Greater Noida Expressway, Peripheral Noida |



*Source: CBRE Research, Q3 2026*

# *Driving Growth Through Expanding Infrastructure*

| City | Road infrastructure (improvement/ expansion) | Metro, Regional, Suburban rail (upcoming/ expansion) | Airport connectivity (existing/ upcoming/ expansion) | Major projects | Key commercial districts to benefit |
|---|---|---|---|---|---|
| **Hyderabad** | ✓ | ✓ | ✓ | • Upcoming metro lines: Planned extension of Corridor 5 (Raidurg-Kokapet via Financial District; Proposed 7 other additional lines (new+ extension)<br>• H-CITI Program (Hyderabad City Innovative & Transformative Infrastructure): Aimed at improving connectivity across Hyderabad through flyovers, underpasses, road widenings, and elevated corridors spanning across Banjara Hills, Khajaguda, Uppal, JBS, Kukkatpally, Chandrayangutta and more | Nanakramguda, Financial District, Kokapet, Shamshabad, Gachibowli, Financial District and Raidurg |
| **Pune** | ✓ | ✓ | ✓ | • Upcoming metro lines: Line 3 (Maan-Shivaji Nagar-Hinjewadi) expected to be fully operational by 2027<br>• Proximity of Navi Mumbai International Airport to Pune's western corridor<br>• Current development of Pune Airport's runway extension Project to enable international flight operations<br>• New airport proposed at Purandar<br>• Recently completed 'Connecting link' of the Mumbai-Pune Expressway | CBD (Shivaji Nagar), SBD West (Baner, Balewadi), EBD West (Wakad), and PBD Hinjewadi |
| **Chennai** | ✓ | ✓ | ✓ | • Upcoming metro lines: Phase 2 expansion includes Purple line (Madhavaram-SIPCOT Siruseri), Yellow line (Lighthouse-Poonamalle Bypass), Red line (Madhavaram-Sholinganallur)<br>• Chennai International Airport: Phase 2 expansion; expected to be completed by 2027<br>• Chennai Peripheral Ring Road: A six-lane greenfield highway to be completed by end of 2026 | Nungambakkam, Guindy, Taramani, Thoraipakkam, Sholinganallur, Navalur, Siruseri, Mount Poonamallee Road, GST Road |
| **Kolkata** | ✓ | ✓ | ✓ | • Upcoming metro lines: Orange Line (New Garia-Airport) expected to be completed by 2028; Purple Line (Joka-Esplanade) expected to be operational by 2029; Yellow Line (Noapara-Barasat via Airport) to become fully operational by 2029<br>• Under construction of 7.2-kilometer, six-lane elevated Kona Expressway corridor to connect NH-16<br>• Planned developments: Chingrighata-New Town elevated corridor; Kolkata Peripheral Ring Road<br>• New airport proposed at Kalyani; land acquisition underway | Central Kolkata, South Kolkata, Salt Lake Sector V, New Town, Rajarhat |

*Source: CBRE Research, Q3 2026*

05

# Workplace Experience

# *Workplace Settings Are Being Rebalanced, Not Reduced*

As the office evolves from a site for routine tasks into a dedicated hub for collaboration, occupiers are fundamentally reallocating their internal space mix. The workplace is evolving from a space for individual work to a platform for collaboration, connectivity, and technology-enabled experiences, to accommodate different workstyles.

FIGURE 5.1: How do you anticipate the following workplace settings and investments to change over the next two years?

**Top workplace investments occupiers plan to increase**

| 52% ▼ | 50% ▼ | 48% ▼ | 47% ▲ | 36% ▼ | 36% ▼ |
|---|---|---|---|---|---|
| Enclosed / soundproof spaces for video calls (small) | Investment in WorkTech (booking apps, sensors) | Collaborative spaces for unscheduled catchups | Meeting rooms for up to 5 people (medium) | Budget for workplace transformation | Community spaces for socialising |

*"Occupiers are looking to increase the provision of enclosed and collaborative spaces, as well as investments in WorkTech. At the same time, they plan to maintain a steady stance in aspects such as space per seat, desk-sharing ratios, and community spaces for socialising, signalling that these settings have reached an optimal level."*

*Arrow shows % change vs the % who selected "More" in the 2025 India Office Occupier Survey*

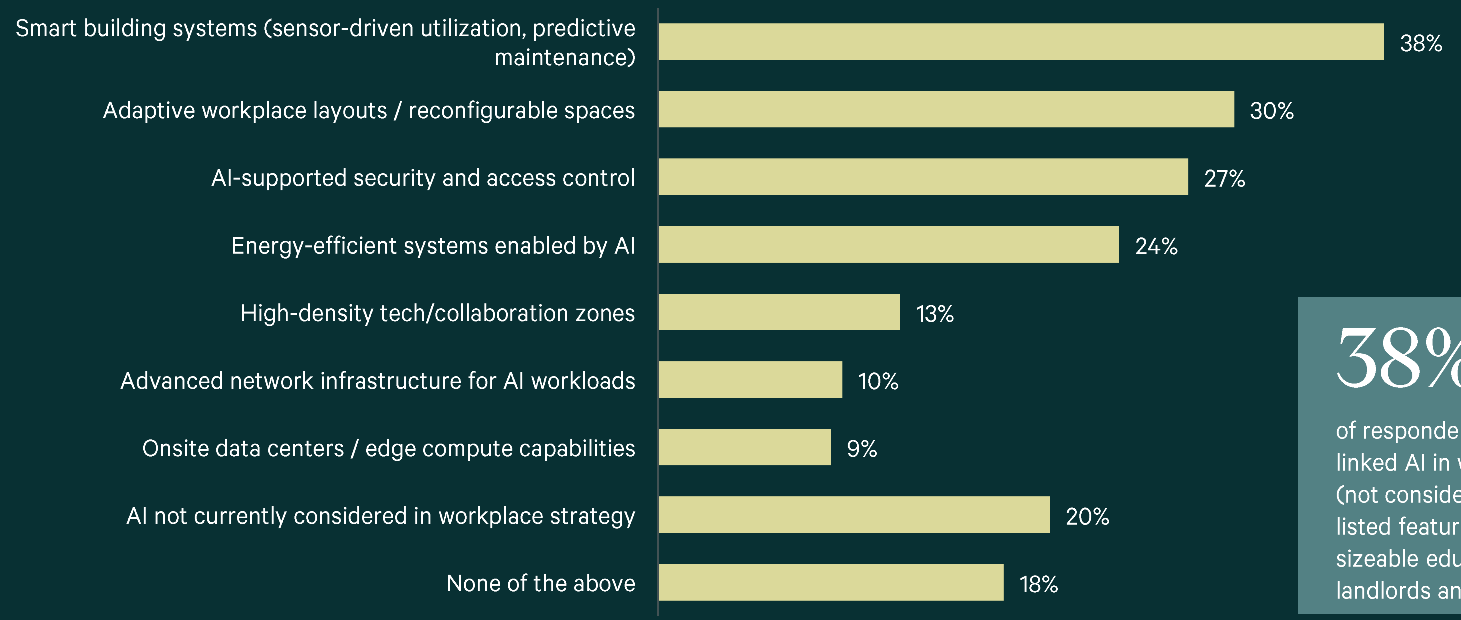
*Source: CBRE's 2026 India Office Occupier Survey; CBRE's 2025 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

# *The AI-ready Office: Smart Systems First*

As occupiers operationalise AI capabilities within their real estate footprints, a definitive specification for the AI-ready building is emerging. Smart building platforms—specifically sensor-driven monitoring and predictive maintenance—lead occupier priorities, outpacing flexible floor plates and AI-enabled security. However, a significant rift remains: a large cohort of occupiers are yet to integrate AI into portfolio planning.

FIGURE 5.2: In an AI-driven future of work, which workplace features would matter most to your organisation?




38%

of respondents have not yet linked AI in workplace settings (not considered, or none of the listed features), indicating a sizeable education gap for landlords and advisors

*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

# *From Design to Commute: Rethinking Workplace Experience*

Workplace redesign has transcended pure spatial functionality to become an active expression of corporate identity. Brand-led and culture-driven design has emerged as the foremost workplace priority, outranking sustainability, placemaking, and data-driven space optimisation. GCCs are driving this trend most aggressively, leveraging tailored environments as strategic vehicles for cultural alignment and talent attraction.

On the infrastructure side, connectivity concerns extend well beyond the initial location decision, emerging as the leading challenge within the cities occupiers have already committed to. This underscores that commute is not merely a site-selection criterion, but an enduring operational constraint.

FIGURE 5.3: What would be your key focus areas in improving workplace experience?

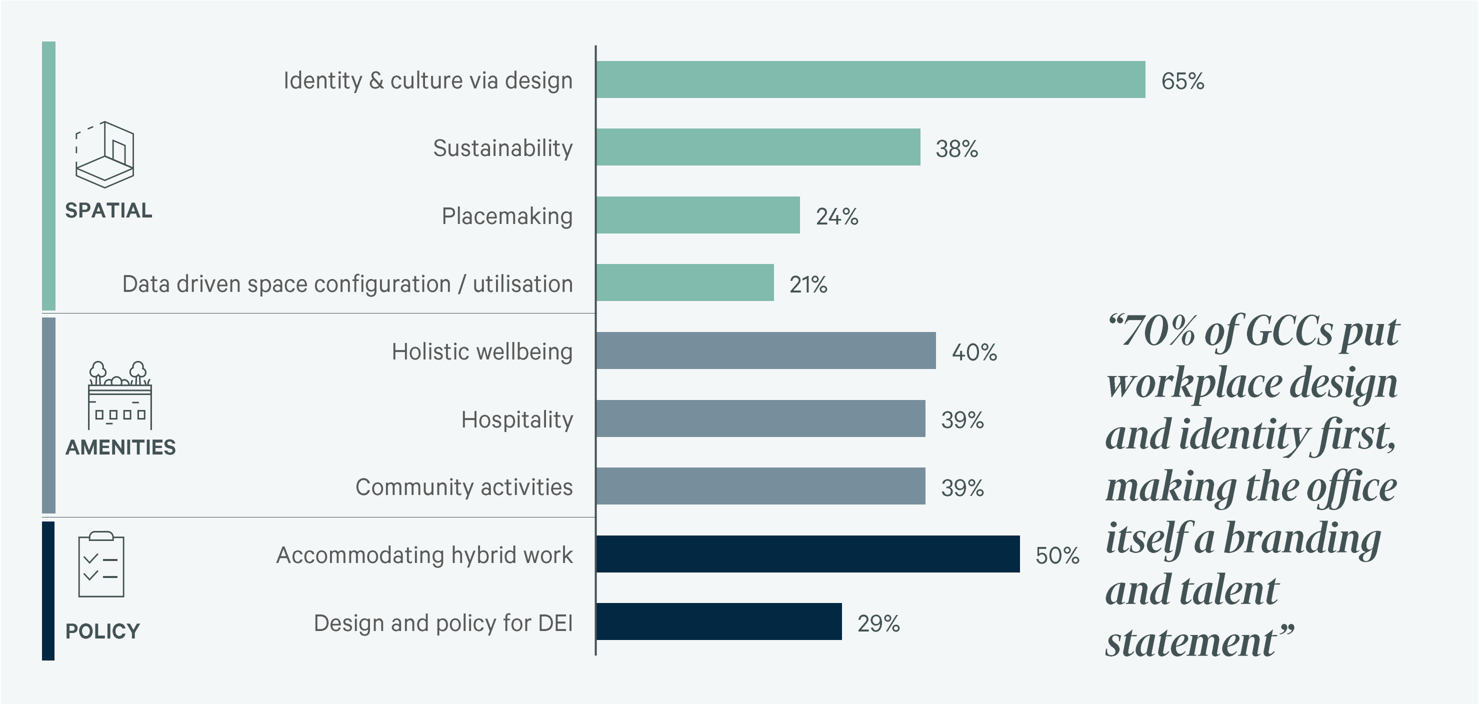
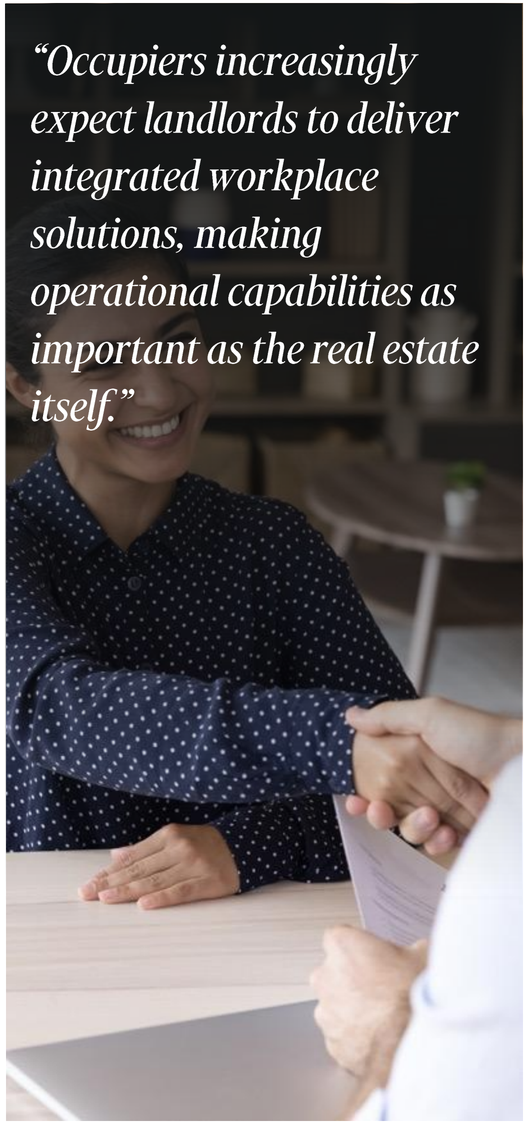



FIGURE 5.4: Which infrastructure-related challenges do you anticipate impacting business operations and employee experience?


*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

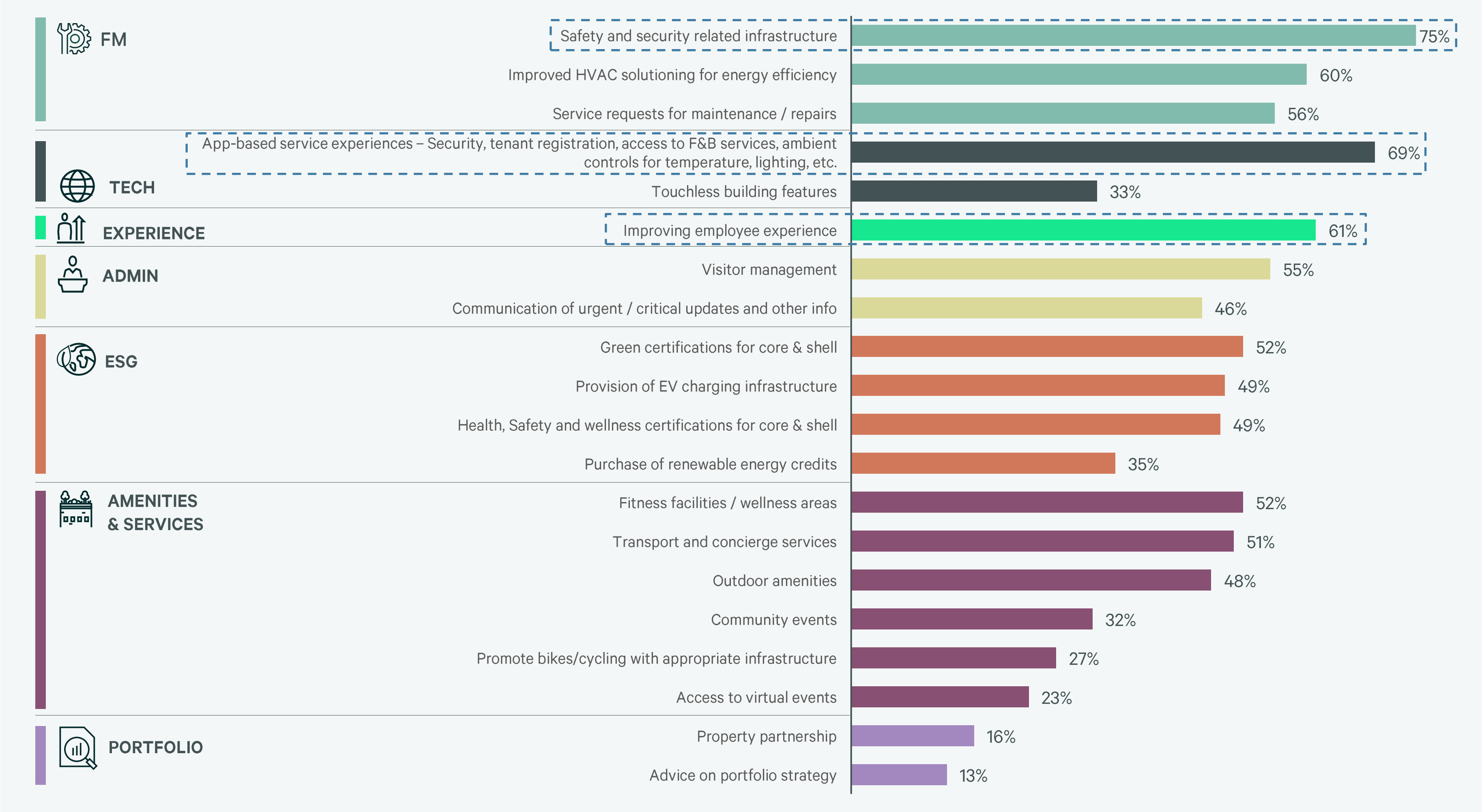
Note: These were a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.



*"Occupiers increasingly expect landlords to deliver integrated workplace solutions, making operational capabilities as important as the real estate itself."*

# Delivering Better Outcomes for Occupiers

FIGURE 5.5: In which of the following areas do you expect developers to partner with your company to create a better office environment?




*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

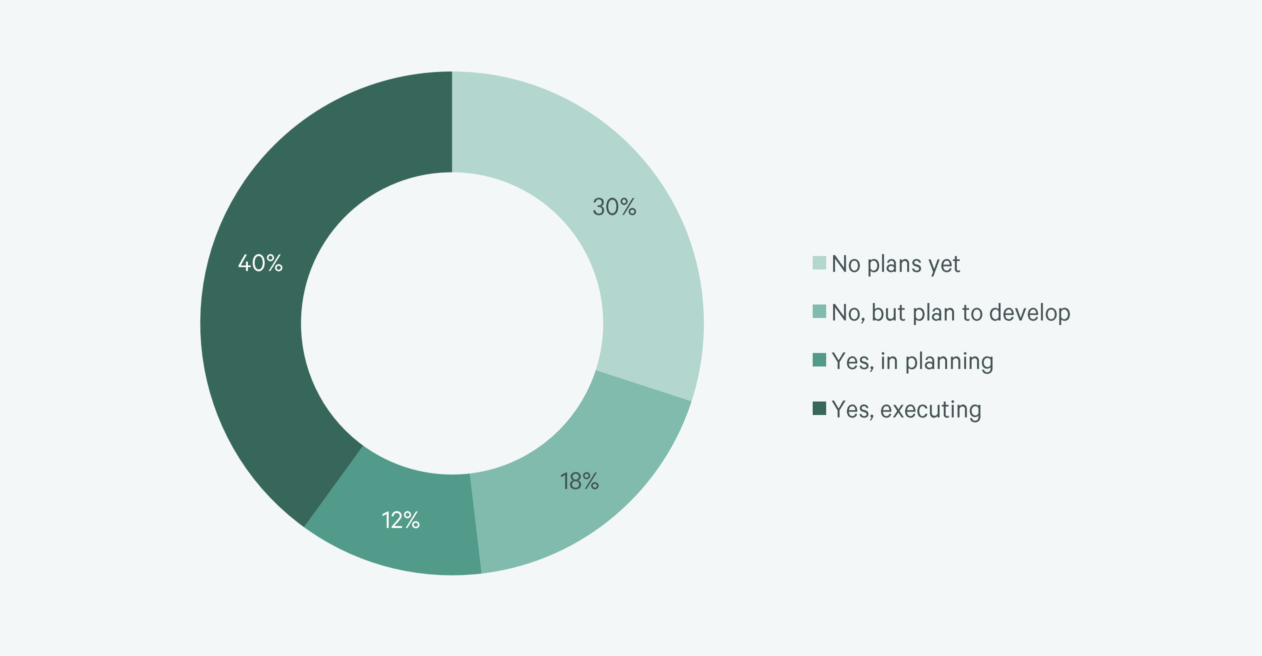
06

# View On ESG

# *Embedding Sustainability in Real Estate Portfolios*

Sustainability has evolved from a peripheral compliance consideration to a fundamental pillar of corporate real estate strategies. Large-sized occupiers have defined ESG goals at far higher rates than small-sized ones, led by stringent reporting standards and dedicated sustainability teams.

FIGURE 6.1: Have you defined ESG goals specific to your real estate portfolio?




*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a single choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

**52%**
have defined ESG goals for their real estate portfolios

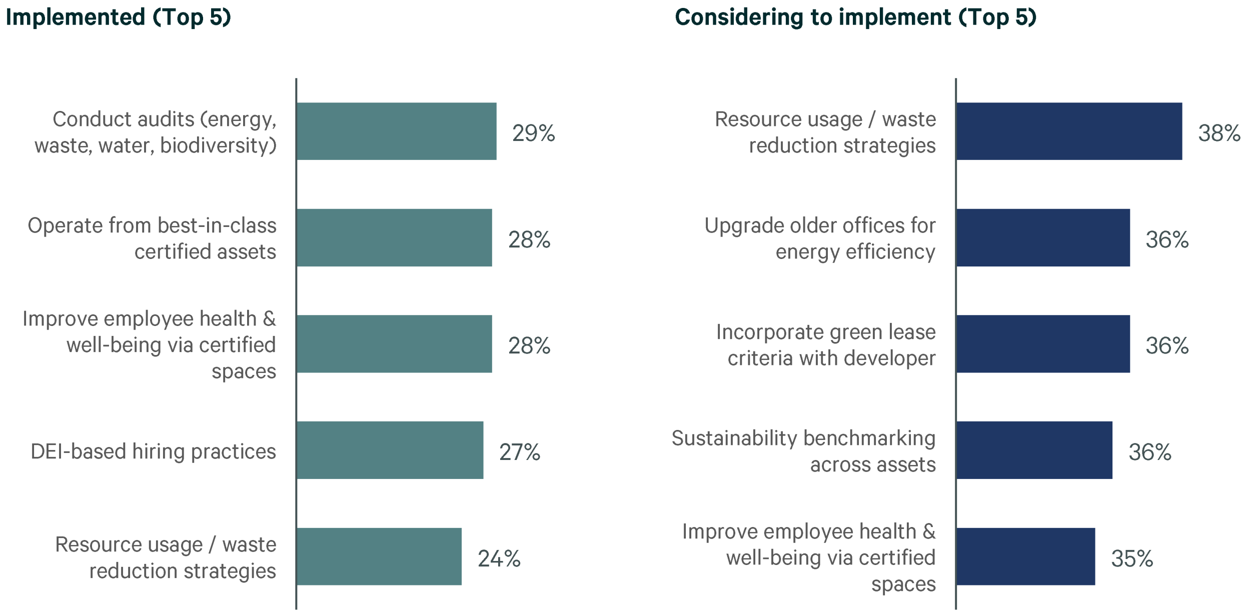
**82%**
large-sized companies have defined ESG goals for their real estate portfolios

**67%**
of EMEA companies have defined ESG goals, driven by stringent regulations


# Sustainability Priorities Moving from Intent to Action

As reporting standards tighten and institutional capital increasingly demands decarbonised spaces, corporate occupiers are moving beyond high-level pledges to operational execution. The gap between intent and action is the widest for initiatives that demand capital or expertise, such as renewable energy targets, green lease structures, and resource-reduction programmes.

FIGURE 6.2: Have you implemented the following sustainability elements for your real estate portfolio?




*"Conducting audits is the leading ESG element implemented by occupiers. DEI-based hiring practices and resource usage / waste reduction strategies also feature among the top considerations, signalling that intent is converting into execution."*

*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

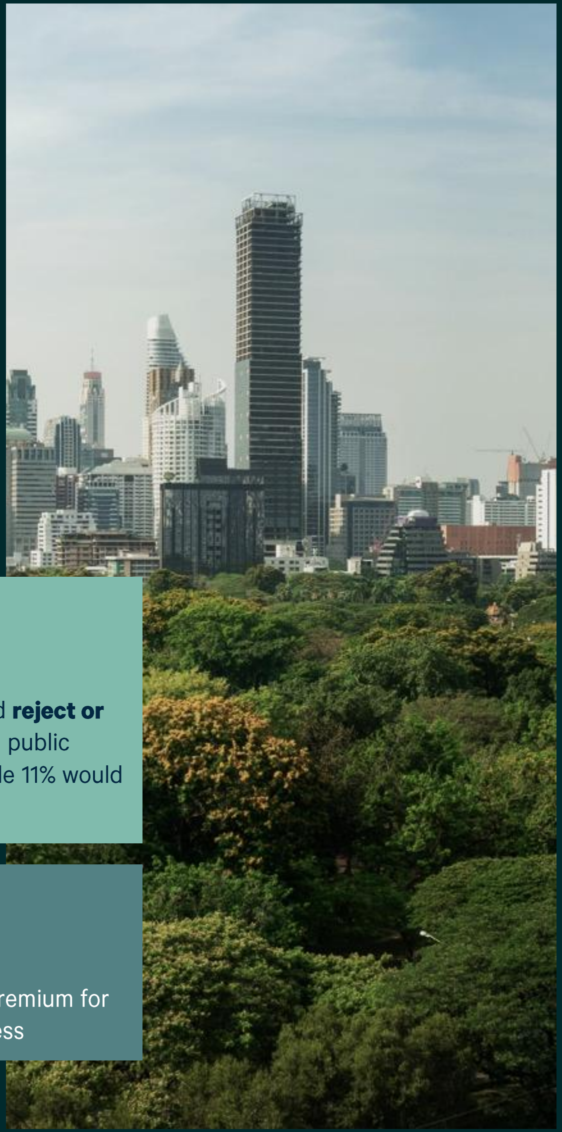
Note: This was a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

# *Sustainability Is a Baseline Expectation, Not a Premium; Transit Is the Dealbreaker*

A clear hierarchy shapes occupiers' asset selection decisions and willingness to pay for sustainable real estate. As green-certified stock exceeds 50% nationally, environmental compliance has reached critical mass, effectively eliminating the green premium for such assets. Occupiers increasingly regard key sustainability features as baseline requirements, viewing them as desirable attributes rather than features that warrant a rental premium.

However, transit access breaks from this pattern and has emerged as non-negotiable for occupiers. Access to public transportation exhibits the highest risk of a tenant exiting if lacking in an asset, as firms treat transit connectivity not as a mere convenience but as a critical operational dependency for talent retention and office utilisation.

FIGURE 6.3: How would the following sustainability and quality-of-life features impact your asset selection?

27%

of respondents would **reject or exit** an asset without public transport access while 11% would seek a discount

18%

are willing to pay a premium for public transport access

*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

Note: This was a multiple choice question. These results are limited to those respondents who chose to answer this question and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations.

07

# Perspectives For Stakeholders

# Perspectives for Stakeholders

01

## Landlords & Developers

- Prioritise commute access and transit connectivity in site selection.
- Assess space requirements of occupiers based on their AI journey and the resulting impact on leasing strategies.
- Design AI-ready assets that combine smart building systems with reconfigurable spaces, rather than focusing solely on infrastructure
- Prioritise developing quality spaces in select tier-II cities to capture occupier demand.

02

## Occupiers

- Plan relocations and expansion requirements well in advance, as availability of high-quality space in core markets remains constrained.
- Treat flexible workspaces as a structural lever, using managed space for speed-to-market and agility.
- Assess evolving workplace dynamics as AI adoption advances, enabling workplace strategies that foster deeper collaboration and enhance productivity.

03

## Investors

- Invest in the upgrading of ageing assets to meet flight-to-quality demand.
- Price green certification as standard, reserve premiums for access to commute and asset experience.
- Evaluate AI adoption and the resultant impact on workforce and workplace, especially for large-portfolios, GCC-anchored assets, to gauge the impact on the larger market.

04

## Government

- Expedite completion of key transport infrastructure, including metro networks, flyovers, and road corridors, to improve accessibility and workforce mobility.
- Enhance urban liveability through improved air quality, efficient waste management, and reliable water infrastructure.
- Foster regular engagement with occupiers and developers to address evolving requirements and support sustained growth, while enforcing targeted policies benefitting specific occupier groups such as GCCs.

*Source: CBRE's 2026 India Office Occupier Survey; CBRE Research, Q3 2026*

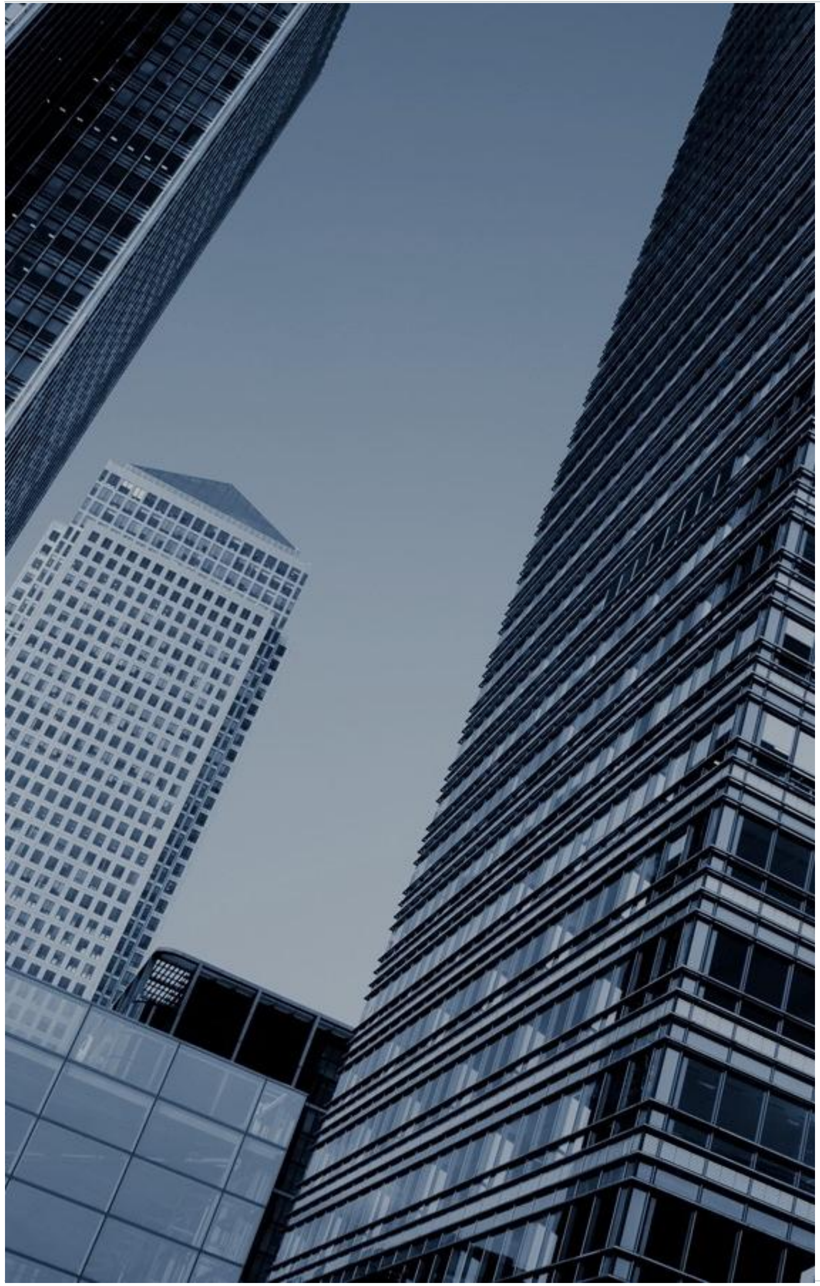
# Disclaimers & CBRE Capabilities

# Disclaimers

These results are limited to those respondents who chose to answer this survey and may differ from individual companies on a case-by-case basis due to their scale, type and location of business operations. CBRE may have adopted certain assumptions for the purpose of providing the report because some matters are not capable of accurate calculation or fall outside the scope of our expertise, or our instructions. To the extent that the report includes any statement as to a future matter, that statement is provided as an estimate and / or opinion based on the information known to CBRE at the date of this document. All statements and implications thus included in this report constitute our judgment as of the date of publishing. They are subject to change without notice, and transactions should not be entered into on the basis of information, opinions and estimates set out herein. There may be differences between projected and actual results because events and circumstances frequently do not occur as predicted. CBRE specifically excludes any responsibility or liability whatsoever in connection with any purchases, disputes, developments or loss of profits for the reader or any other person on account of this report.

Additionally, any regional or sectoral conclusions may differ and may not be fully applicable to individual firms and should be looked upon from a case-to-case perspective. Local dynamics may also result in a difference of results for individual corporates due to the type, scale and location of business operations. There may also be a change in occupier sentiments due to any adverse event which may lead to varying results in the future.





# *Leasing Services Overview*

| | | |
|---|---|---|
| 460+<br>MSF area transacted | 3,000+<br>Clients represented | 600+<br>Transaction advisors |
| 5,000+<br>Transactions closed | 250+ Cities<br>Assignments Executed Across | 3,900+ Acres<br>Land Acquired & Disposed |

## *Services Offered*

### OCCUPIER SERVICES

ACQUISITION, DISPOSITION & SUBLEASING | DATA CENTRES | ENERGY & SUSTAINABILITY | FINANCIAL CONSULTING | INDUSTRIAL & LOGISTICS SERVICES | PORTFOLIO / LEASE MANAGEMENT SERVICES, INCLUDING LEASE ADMINISTRATION & ESTATE MANAGEMENT | LABOR ANALYTICS | LOCATION ANALYTICS | RETAIL ANALYTICS | OCCUPIER CONSULTING – METRO PLANS, PORTFOLIO OPTIMIZATION AND BENCHMARKING | STRATEGY DEVELOPMENT (INCLUDING LEASE OR OWN) | HEALTHCARE & EDUCATION | INVESTMENT SALES | FLEXIBLE SOLUTIONS | CBRE VANTAGE

### INVESTOR SERVICES

ASSET ANALYSIS | COMPETITION ANALYSIS | MARKET BENCHMARKING | DEVELOPMENT OF PROSPECT PROFILE | FULL-SERVICE PROPERTY MARKETING

# Workplace Strategy, Change Management & Occupancy Planning

Unlocking the potential of space to inspire individual creativity and drive organizational performance

## Key Statistics

We are a group of incredibly talented individuals with a rich breadth of skills and experiences with backgrounds as diverse as design, workplace strategy, commerce, real estate, occupier consulting, organization transformation, etc.

Largest established team

Holistic experience across greenfield & brownfield sites

**300,000+**
impacted employees across the country

**90-11,000+**
impacted headcount (project scale)

### Diverse sector experience

Back-office | Front office | Technology | Pharma | R & D | BFSI | Engineering | IT/ ITeS

## Our ideology

- From tactical to transformative, we meet you where you are and take you where you need to go
- By simply shifting focus from what people think they need, and asking them what it is they do, we are able to develop a framework that will allow you to evolve and disrupt the status quo for a truly effective and efficient workplace experience

| GREAT WORKPLACE STRATEGY | X | WILLINGNESS TO ADAPT | X | OPERATING PLATFORM | = | ₹₹ |
|---|---|---|---|---|---|---|
| Right ingredients; right quantities; put together in the right way | | A strategy that 'feels right'; people engaged in the creation process; solutions that make lives better / easier / simple; connect to your KPIs | | Right technology; anticipate change early; align systems and platforms to the strategy; train people | | More engaged people performing better; optimize workplace; flexibility to respond to change; showcase for your brand and values |

# What Can We Do For You

## Services offered

Our services unlock the potential of space to inspire individual creativity and drive organizational performance.

1

### WORKPLACE STRATEGY

- Formulate a strategy for your existing / future workplace in line with changing business priorities and evolving external environment.
- Helping you make informed, data-driven decisions for your real-estate investments, ensuring business objectives are met, employee effectiveness bolstered, and brand strengthened.

2

### EXPERIENCE CONSULTING

- Curating interactions with people, processes, technology, services, events and management to 'elevate the everyday'.
- Journey mapping, gap assessment & enhancing experience across elements such as parking, food, meeting room booking solution, way finding, etc.

3

### OCCUPANCY & SPACE PLANNING

- Leverage occupancy data to empower, anticipate and unlock opportunities within the portfolio.
- Mix of variable and dedicated service offering - can be a single occupancy plan to support project delivery or ongoing services to maintain accurate occupancy data and undertake strategic / tactical planning

4

### UTILIZATION MAPPING

- Comprehensive data gathering with quantitative analysis to understand how the current workplace is being utilized and any related opportunities.
- Encompasses study of workstations, meeting rooms and other collaboration spaces.

5

### CHANGE MANAGEMENT

- Creating a participative ecosystem that is owned and role modelled by leaders & champions.
- Ensuring seamless transition to the new workplace/ways of working/return to office.

6

### ASSET ENHANCEMENT

- Helping developers & landlords plan, design and manage campuses that inspire and promote social interactions and exchange.
- This includes advising on areas of influence such as product planning (for office, retail & support spaces), park level master planning (brownfield and greenfield), wayfinding, inclusive design, traffic planning (vehicular and pedestrian), landscaping, amenitisation, social infra planning etc.

7

### DESIGN GUIDANCE

- Helping translate the vision and workplace strategy into the physical space with an end user perspective in mind.
- Handhold the architects on board – review of floor plans, furniture selection, etc.

ASSET ENHANCEMENT

# Advisory Capability

From Asset Centric

Sales Enabled - Transaction Led

To User Centric

Sales Enabled - Experience Led

## Questions we help answer (for Developers / Investors / Occupiers)

1. How has Occupier Decision Criteria evolved & its impact on Stickiness / Site Selection ?
2. How do current & future state market metrics influence your asset's positioning / potential ?
3. What are competition assets offering – specs, amenities, positioning, wellbeing & sustainability initiatives, user-experience, etc. ?
4. Do you have a strong business case for enhancement / upgradation ?
5. How does your asset compare with industry best practices ?
6. Which enhancement opportunities should you explore to plug the differentiation gap ?
7. How do you quantify the ROIs / associated impact of enhancement / upgradation ?
8. How to implement these initiatives backed by a prioritized and phased roadmap ?
9. Initiatives to create Experiential & Economic Value (and increase market saleability / valuations) ?

**Target Goal Posts:**

- Elevating Experience Quotient
- Enhancing Tenant Stickiness
- Rentals & Vacancy Impact
- Operations Efficiency
- Long Term Asset Relevance

ASSET ENHANCEMENT

# Advisory Capability

From Asset Centric

Sales Enabled - Transaction Led

To User Centric

Sales Enabled - Experience Led

## Process Overview – How do we arrive at Asset Enhancement Recommendations

MARKET METRICS
- Opportunities
- Risks

YOUR ASSET ASSESSMENT
- Challenges
- What's Working Well

COMPETITION BENCHMARKING
- Best Practices
- Success / Failure Factors

STAKEHOLDER PERSPECTIVE
- Pain Points
- Tenant Expectations

Gap Assessment & Identification of Interventions

**Ecosystem Level**

**Cluster Level**

**Building Level**

Prioritization

**Short Term**

**Medium Term**

**Long Term**

- Implementation Roadmap
- Cost Outlay
- Benefits Delineation, Cash Flows, Return Metrics
- Tenant Socialization

ASSET ENHANCEMENT

# *What Can We Do For You*

### Product Mix Formulation

- Region & Location Analysis
- Real Estate market assessment
- Demand Estimation
- Highest & Best Use Analysis
- Optimal Product Mix Recommendations

### Financial Assessment

- Assessment of Cost implications
- Assessment of Revenue potential
- Financial modelling (DCF, IRR, NPV Calculations)
- Project structuring

### Planning & Design

- Site Surveys
- Land Use Analysis
- Review of Development Control Regulations
- Fitment Analysis
- Traffic Planning
- Landscape Planning
- Conceptual Planning

### Monetization Strategy

- Identifying model of disposition
- Assessment of Reserve Price
- Marketing Strategy
- Investor Prospecting
- Product Segmentation

### Implementation Strategy

- Preparing suitable monetization documents
- Investor Reach-out Plan
- Investor engagement program
- Negotiations and Finalization

# Consulting

CBRE Consulting offers real estate, infrastructure and urban economic consulting services. Our services combine people, services and knowledge to deliver innovative, customized, quality oriented and cost-effective solutions.

CBRE is well placed to meet the diverse needs of its clients. Having advised clients on major real estate/ infrastructure initiatives undertaken in India post liberalization, including Privatization of Airports, the Delhi Mumbai Industrial Corridor, Divestment of ITDC Hotels, Greenfield and Brownfield SEZs/ Industrial Parks, Residential Townships, City Centre Developments, etc.

CORE SERVICES:

- Market Research & Demand Forecasting
- Highest & Best Use Analysis
- Feasibility Studies
- Due Diligences
- Financial Assessment
- Implementation Strategy
- Master Planning
- Techno-Economic Viability Studies Location Strategy
- Entry & Exit Strategies
- Data Services

NICHE SERVICES:

**Occupiers:**

Workplace Strategy | Change Management | Portfolio Optimization | Lease vs Buy

**Retail:**

Tenant Mix & Zoning | Design Review | Catchment Study | Mall Repositioning Strategy | India Entry Strategy | Pre-Acquisition Due Diligence

**Hospitality:**

Investor & Operator Search | Asset Management

**Industrial & Logistics:**

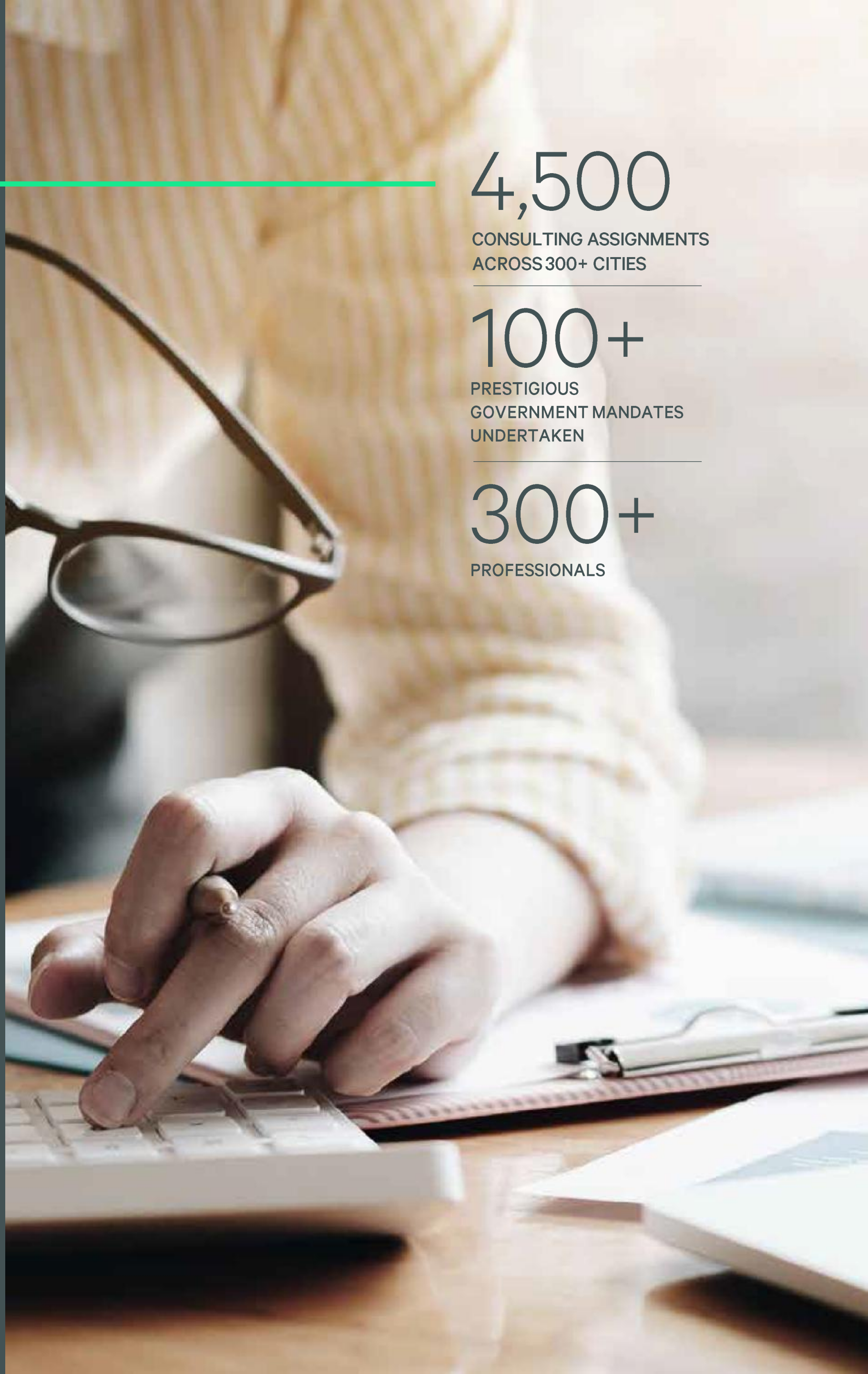
Industry Positioning & Strategic Development Plan | Investor Engagement | Marketing Strategies | Supply Chain Optimization

**Government Advisory:**

Bid Process Management | PPP Structuring | Transaction Advisory | Policy Formulation | City Development Planning

**Master Planning:**

Acquisition Diligence | Preconcept & Concept Master Plan | Layout Plan



4,500

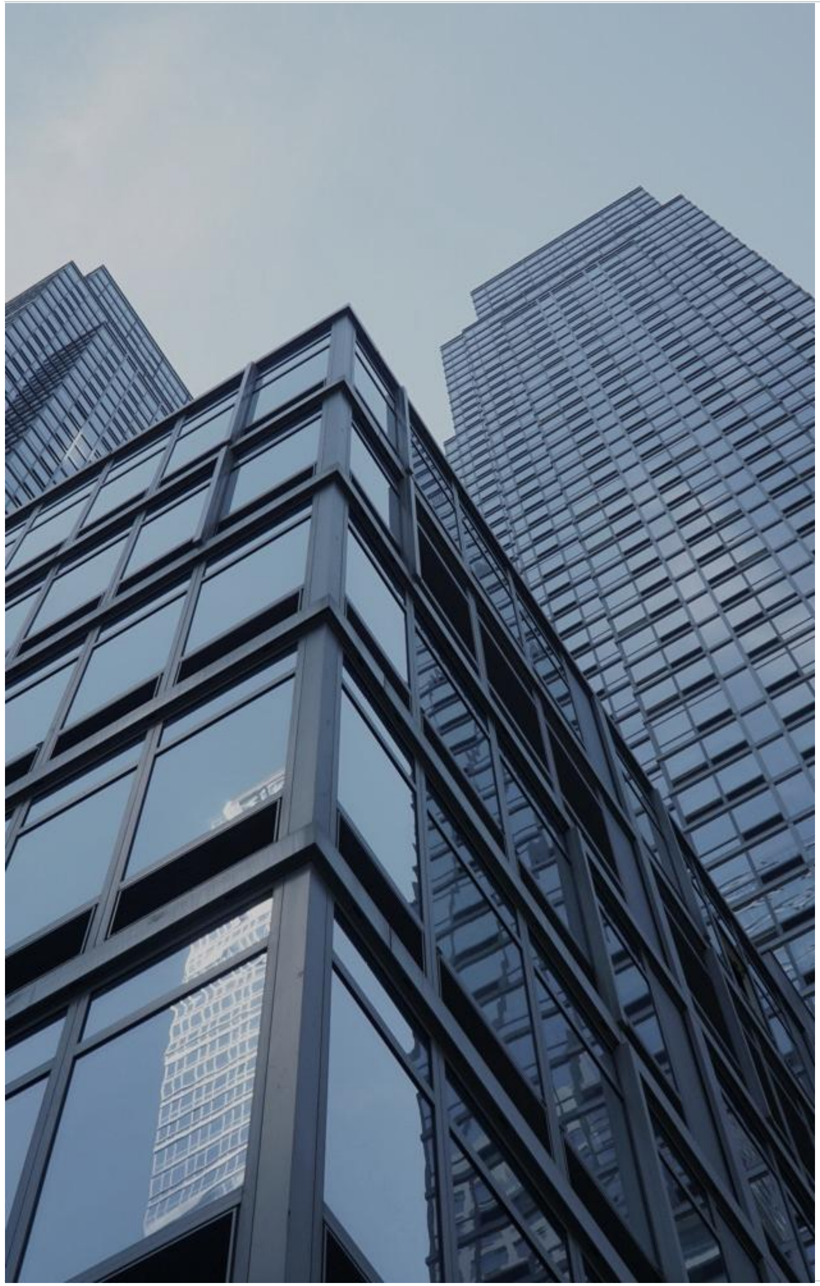
CONSULTING ASSIGNMENTS ACROSS 300+ CITIES

100+

PRESTIGIOUS GOVERNMENT MANDATES UNDERTAKEN

300+

PROFESSIONALS



# *Building Operations & Experience (BOE)*

| | | |
|---|---|---|
| 2,050+ Sites under Management | 75,000+ Outsourced Vendor Partner Staff | 8200+ Professionals |
| 510+ Million SF are Managed | 620+ Clients Serviced | Presence in Over 90+ Towns & Cities |

## IMS Certification

**Quality management**
ISO 9001:2015

**Occupational Health & Safety**
ISO 45001:2018

**Environmental management**
ISO 14001:2015

**Energy management**
ISO 50001:2018

# *What Can We Do For You*

## Services offered

### *Soft services*

- Janitorial Services
- Waste Management
- Grounds & landscaping
- Pest Control & Sanitization
- Stores & Inventory Management
- Waste Management
- Office Support Services: Reception, Helpdesk, Mailroom & other office admin services
- Stores & Inventory Management
- Conference Room management

### *Technical services*

- Utilities Operations & maintenance
- Annual Maintenance Contracts
- Repair & Maintenance
- Mechanical & Plumbing
- Electrical Maintenance
- Building and Fabric Maintenance
- HVAC Maintenance
- Building security
- Fire Prevention Systems
- Fire & Safety Audits
- Equipment Health Analysis
- Project Snagging
- Minor Projects

### *Specialized services*

- Health & Safety Environment Management
- Event Management
- Catering Management
- Transport Management
- Smart Buildings and Services
- Space & Occupancy Planning
- Executive Business Centre management & Guest House Management
- Wellness Services
- Return to Offices Audit & Support
- Mail Delivery & Courier Services
- Guest Relations & Visitor Management
- FM Consultancy Services

### *Security services*

- Man Guarding
- Access Control
- Patrol Services
- Ad-hoc Covers
- Visitor Management
- Card & Key Management
- Emergency Procedure
- Risk Assessment

# PROJECT MANAGEMENT, INDIA

IMS Certified: ISO 9001:2015,
ISO 14001:2015 & ISO 45001:2018

**1.3+BN SF**
TOTAL PORTFOLIO

**1,600+**
SERVED

**6,000+**
PROJECTS COMPLETED

**3,000+**
PJM PROFESSIONALS

**700+**
ONGOING PROJECTS

**900+**
PROJECTS IN TIER 2 & 3 CITIES

## Services Offered

+ Program Management
+ Project Management
+ Principal (Fit-out & MEP)
+ Cost Management
+ Project Monitoring
+ ESG & Sustainability
+ Independent Commissioning Services
+ Technical Due Diligence
+ Quality Assurance/Quality Control

# *Sustainability Advisory*

### Which green certifications are available?

**LEED**

- New Construction
- Comm Interiors (CI)
- Existing Building (O&M)

**IGBC**

- New Buildings
- Green Homes
- Green Factories
- Townships
- SEZ
- Existing Buildings

**GRIHA**

- GRIHA BUA >2500 SQM
- SVA GRIHA BUA <2500 SQM
- GRIHA – Large Dev. BUA >15 Lac SQM

### How do we achieve them?

- Formulate specific green objectives for the project
- Review designs for green performance categories
- Ideate and suggest green design inventions
- Green ranking documentation assist in certification

### Who needs Green Design?

- Corporate Workplace
- Commercial Developments & Institution
- Residential Developments & Townships
- Industrial & Logistics

### Why CBRE?

- Holistic
- Engaged
- Experts
- Targeted
- Data-Driven

# *Wellness Advisory*

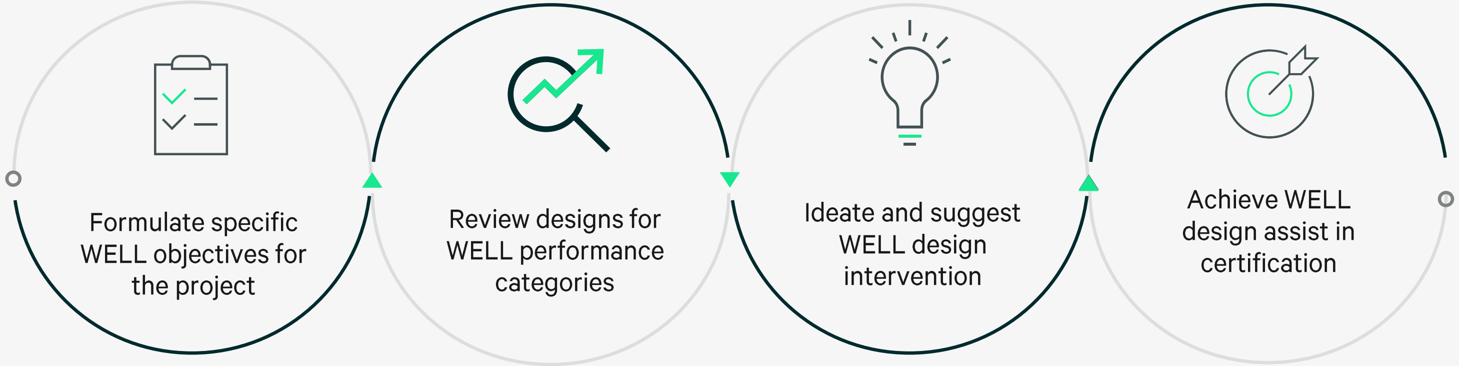
### What is WELL Building Standard?

The WELL Building Standard is the first building standard to focus exclusively on the health and wellness of the people in building. WELL is a performance-based system for measuring and certifying features of the built environment that impact human health and well-being through air, water, nourishment, light, fitness, comfort and mind.

### Why WELL-Design Advisory?

About 90% of our time is spent within a building – whether home or workplace. Also, 85% of operation costs of any organization is its people. As part of the Design Advisory & Management offering of Project Management vertical, we marry the best practices in design and construction with evidence-based medical and scientific research – harnessing the built environment as a vehicle to support human health and well-being.

## How do we achieve it?




Who Needs

## WELL DESIGN?

- CORPORATES
- CAMPUSES
- COMMERCIAL DEVELOPMENTS
- INDUSTRIAL & LOGISTICS FACILITIES

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