CBRE

ADAPTIVE SPACES

India's Next Office Growth Cycle

Occupier Sentiment, GCC Momentum and ESG Imperatives

REPORT

INDIA RESEARCH
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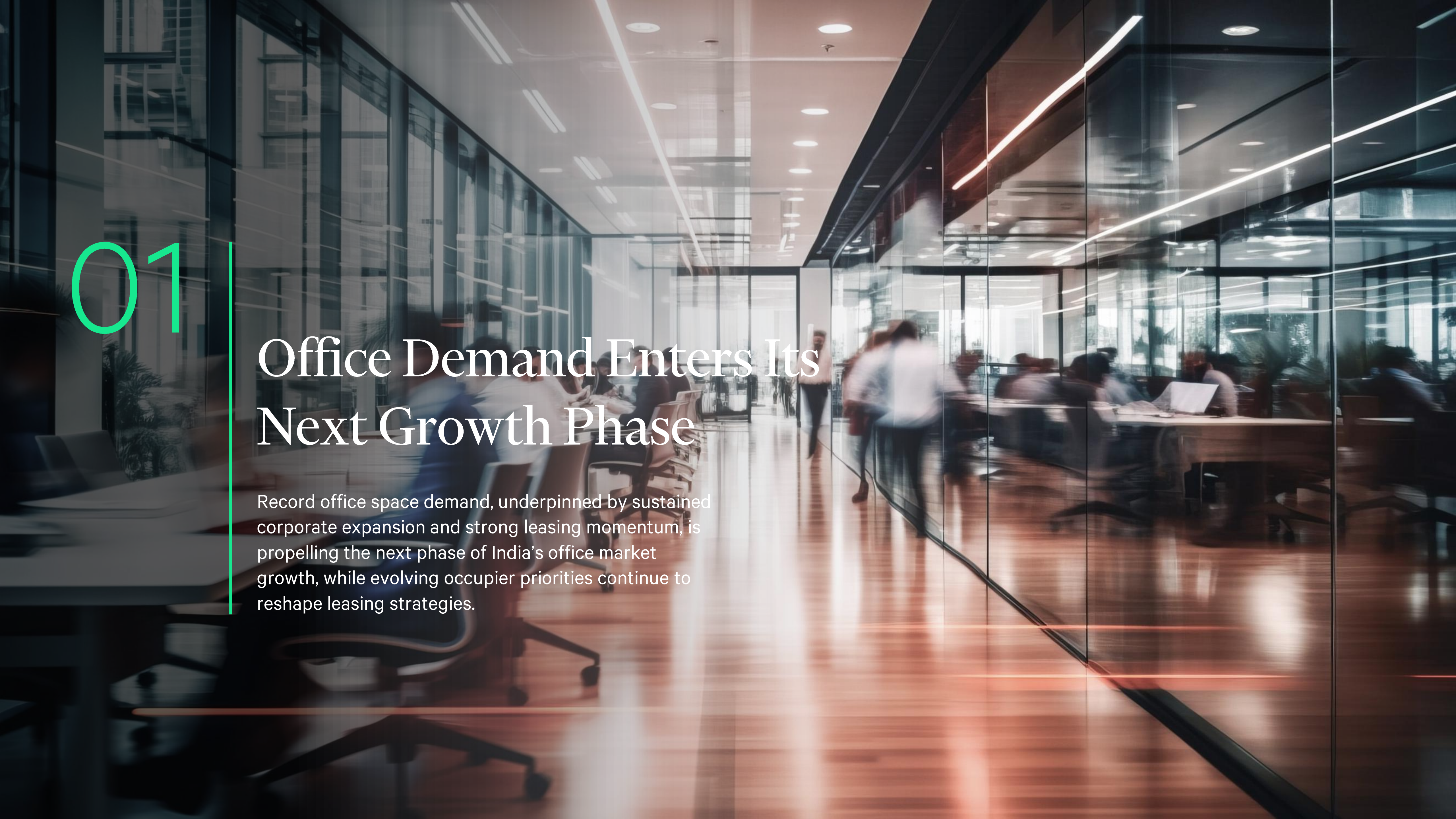
Contents

Executive Summary

India's office market is entering a new growth phase, underpinned by sustained corporate expansion, record leasing activity and enduring occupier confidence. As demand continues to scale, occupiers are becoming more discerning in how and where they deploy capital, with workplace decisions increasingly shaped by quality, connectivity and long-term value. While AI adoption is becoming increasingly widespread across enterprises, its impact on office demand remains evolutionary rather than disruptive, reinforcing demand for premium, technology-enabled workplaces that support workforce productivity and business transformation.

Global Capability Centres (GCCs) remain at the forefront of this growth story. Supported by strong business fundamentals, enabling reforms and increasingly targeted state-level initiatives, these centres are evolving from scale-driven operations into strategic hubs for engineering, digital transformation, analytics and innovation. In doing so, they continue to reinforce demand for high-quality office environments across India's leading business centres.

This next cycle of office growth is also being shaped by a heightened focus on employee experience, operational resilience and sustainability. Commute infrastructure has become a non-negotiable factor in location decisions, while sustainability has evolved from a compliance-led objective into a core component of real estate strategy. As stakeholders shift from target-setting to measurable action, resilient, well-connected and sustainable workplaces will be best positioned to attract occupier demand and create long-term value.



01

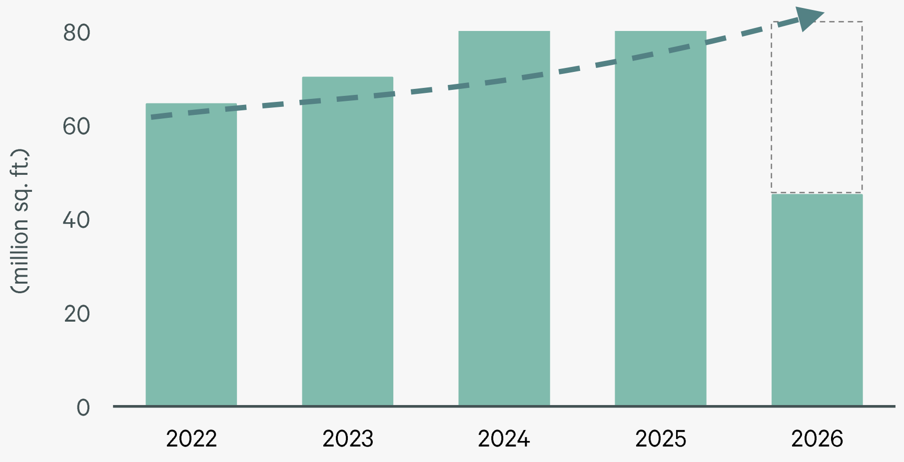
Office Demand Enters Its Next Growth Phase

Record office space demand, underpinned by sustained corporate expansion and strong leasing momentum, is propelling the next phase of India’s office market growth, while evolving occupier priorities continue to reshape leasing strategies.

India's Office Market Builds on Record Demand

The office real estate sector has maintained healthy absorption momentum, demonstrating resilience amidst continuing geopolitical uncertainties and accelerating artificial intelligence (AI) adoption. Leasing activity has reached successive record levels since 2023, with H1 (January-June) 2026 marking the strongest half-year performance on record, reflecting robust market fundamentals and long-term growth potential. Alongside domestic occupiers, global capability centres (GCCs) continue to deepen their presence through the expansion of existing operations and the entry of new firms.

Figure 1.1: Office leasing reaches successive record levels (2022-H1 2026)



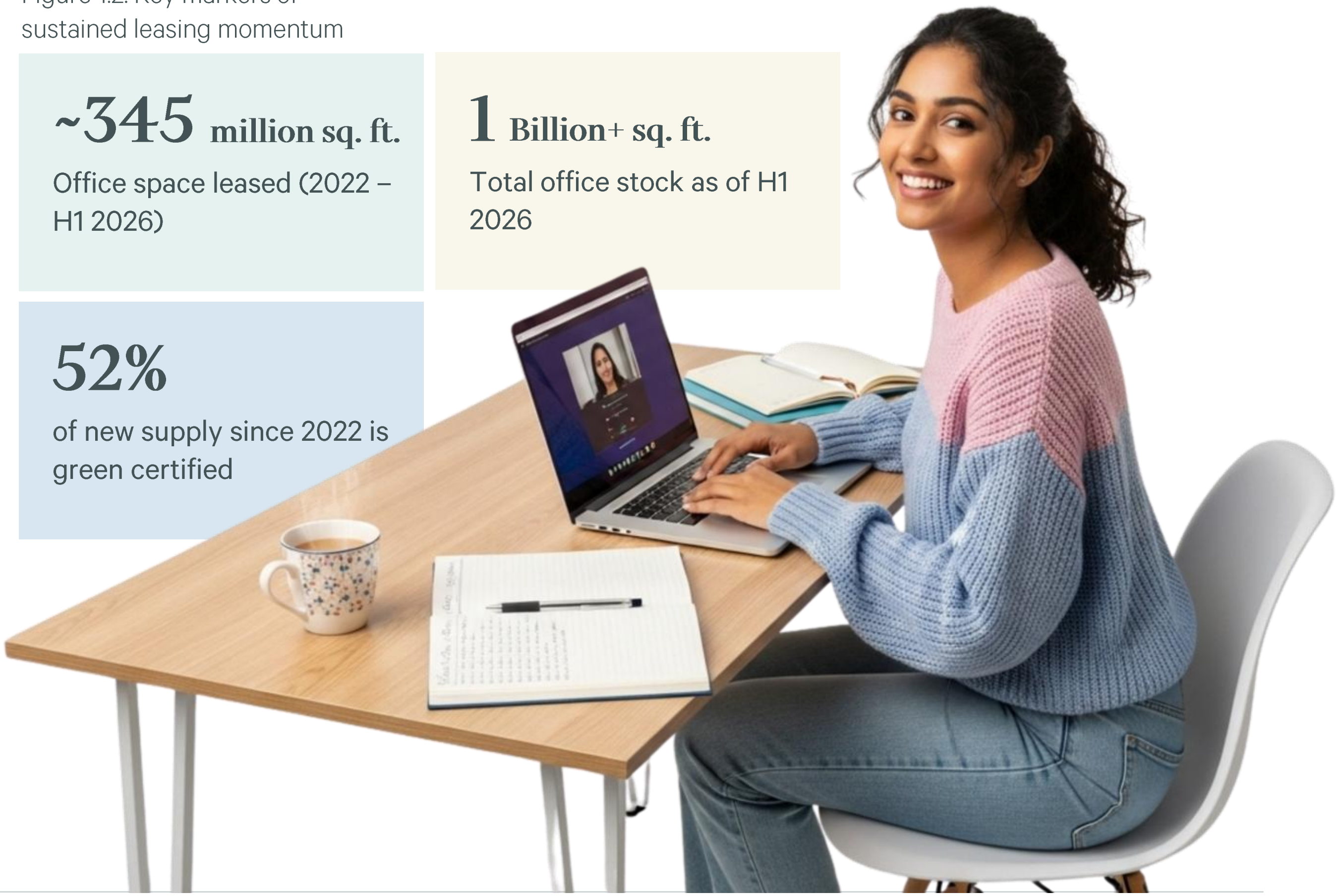
"Strong occupier confidence and a growing preference for high-quality workplaces continue to support market expansion."

Figure 1.2: Key markers of sustained leasing momentum

~345 million sq. ft.
Office space leased (2022 – H1 2026)

1 Billion+ sq. ft.
Total office stock as of H1 2026

52%
of new supply since 2022 is green certified

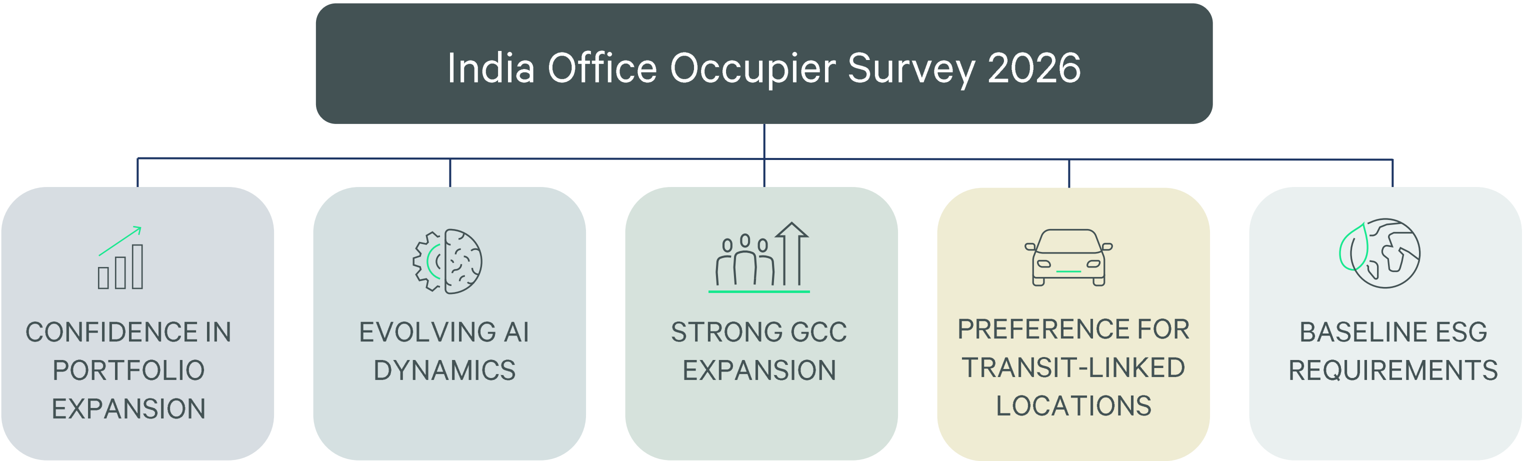


Source: CBRE Research, Q3 2026

Five Forces Shaping the Future Workplace

India's position as a global innovation and talent hub continues to transform office demand. Occupiers are increasingly prioritising high-quality, well-connected and sustainable workplaces, reflecting a broader shift towards talent-centric, technology-enabled and future-ready real estate strategies. The India Office Occupier Survey 2026, which sought responses from more than 200 CXOs overseeing diverse office portfolios across India's leading markets, highlights strong expansionary intent amidst key factors shaping their decision-making. The findings underscore five broad forces reshaping office demand in India, as shown below.

Figure 1.3: The five forces shaping future office demand in India



More than three-fourth of the surveyed occupiers expect their India office portfolio to grow over the next two years

Over one-third of occupiers indicate that evolving AI and automation trends will directly shape leasing decisions over the next 12-24 months

75% of the GCC occupiers expect their India office portfolio to grow over the next two years

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

With 52% of respondents having defined ESG goals, sustainability has become a core pillar of corporate real estate strategy

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

02

How are Occupiers Viewing Real Estate Portfolio?

Growth intentions remain strong, but office leasing decisions are increasingly guided by the pursuit of enhanced workplace experience, technology-enabled environments, and long-term value creation.

Occupiers Are Actively Planning To Grow, Not Just Holding Steady

Strong economic fundamentals and sustained business confidence continue to support expansionary workplace strategies across India. Occupiers are translating this optimism into long-term portfolio commitments, with larger and more strategic space acquisitions reinforcing demand across key office markets.

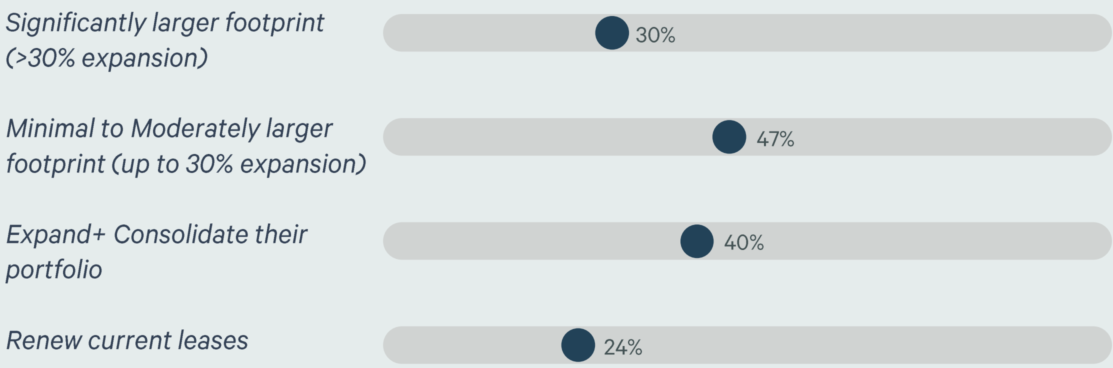
77%

Occupiers are planning portfolio expansion in India over the next two years

Surge in aggressive growth: 30% of occupiers plan to expand footprints by over 30%, nearly doubling from 18% in the 2025 survey.

Broad sectoral appetite: High-growth sectors such as technology, BFSI, and engineering & manufacturing remain key drivers of this expansion, while increasing participation from life sciences, and research, consulting and analytics is further widening the occupier base and long-term expansion prospects.

Planned footprint changes in the next 24 months



63%

of large-sized firms plan to expand and consolidate their portfolios over the next 24 months, while nearly 30% of large and medium-sized firms intend to renew current leases.

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

AI Adoption is High, Leasing Impact Is Still Catching Up

More than one-third of occupiers expect AI-driven automation to influence their leasing decisions over the next 12-24 months. As organisations embed AI into their operating models, workplace strategies are evolving to support new talent requirements, redesigned workflows and greater automation. While AI's direct impact on headcount projections and consequently on office space demand remains limited, it is accelerating the flight-to-quality trend, driving demand for premium, technology-enabled workplaces that support a more specialised and highly skilled workforce.

AI adoption outpaces workplace impact

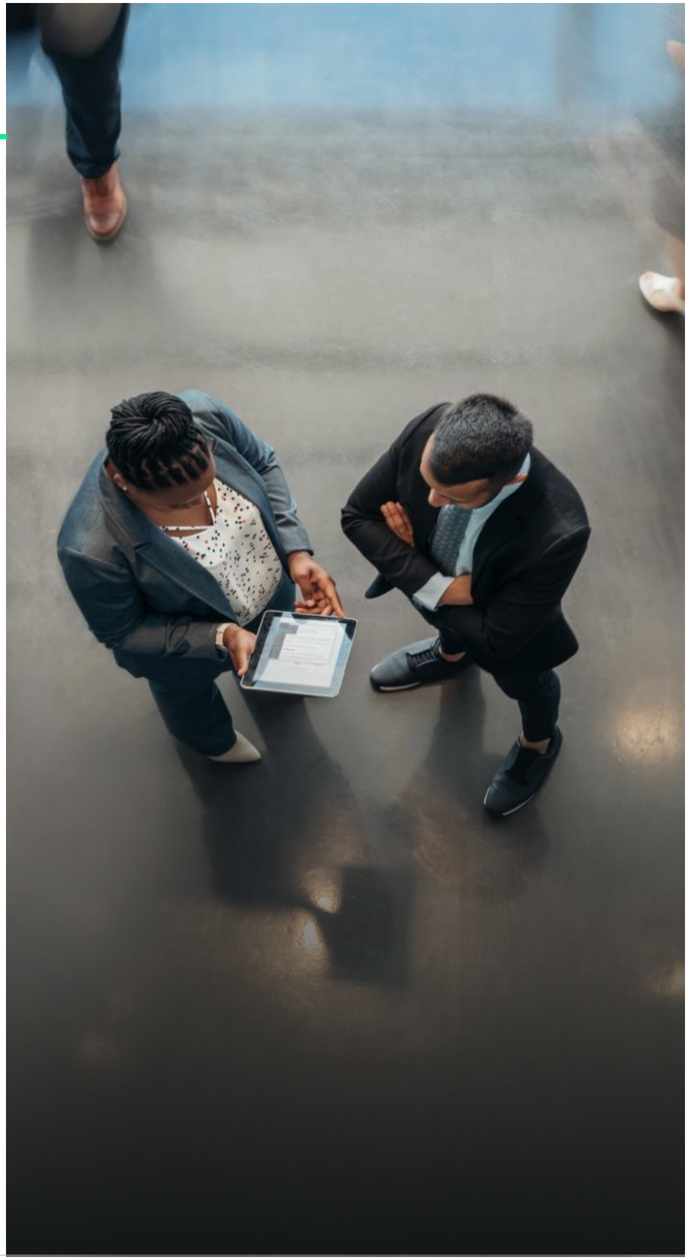
Widespread AI Implementation: Our survey highlights widespread AI adoption across occupiers, with 93% already deploying AI in some capacity. GCCs continue to lead the trend, with a 95% adoption rate as they accelerate digital transformation.

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

57% respondents say there is no measurable impact of AI on their office leasing strategy

38% respondents have not yet linked AI in workplace settings, indicating a sizeable education gap for landlords and advisors

"The increasing adoption of AI is elevating workplace expectations, with workforce planning and real estate decisions increasingly shaped by the maturity and business impact of their AI strategies."

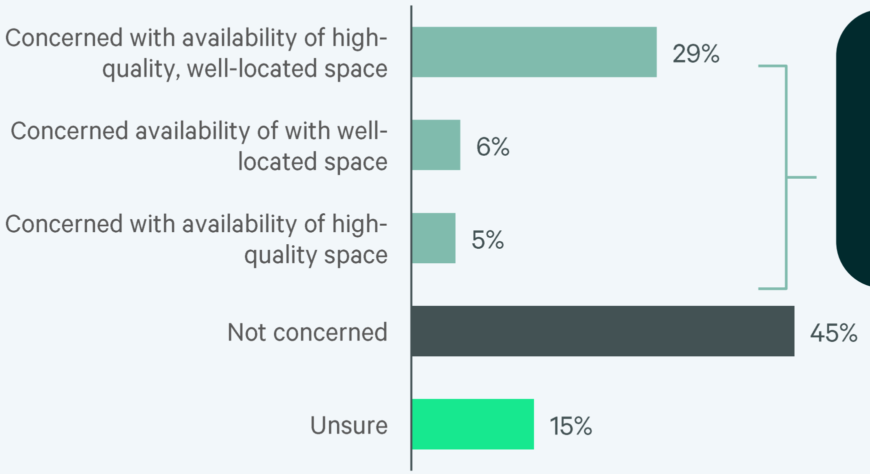


Source: CBRE's India Office Occupier Survey 2026, August 2026; CBRE Research, Q3 2026

Asset Quality Retains Strategic Importance

The flight-to-quality trend remains firmly intact, with occupiers continuing to prioritize investment-grade workplaces amidst tightening availability across key office markets. Survey findings indicate that 40% of occupiers face challenges in securing high-quality, well-located space, while more than half of occupiers considering relocation are targeting superior assets to enhance employee experience and support long-term growth.

Figure 2.1: Occupier concerns regarding future supply over the next three years (2026-2028)



40%

are concerned about the availability of high-quality, well-located spaces through 2028

Figure 2.2: Preferred micro-market strategy for new office locations

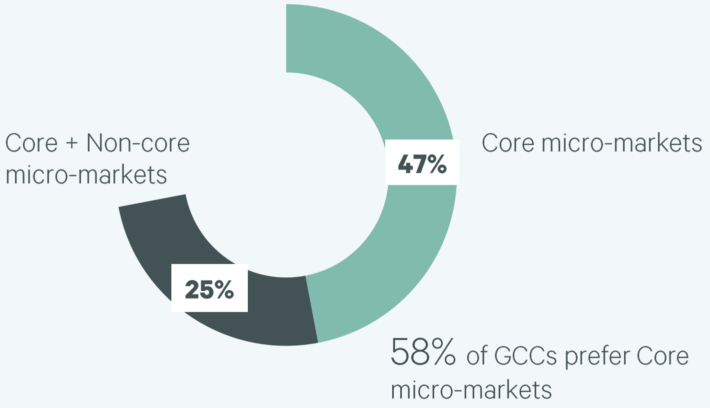


Figure 2.3: Market activity reinforces the flight-to-quality trend

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 in investment-grade assets

"The flight-to-quality trend extends beyond asset choice to location, with occupiers favouring Core micro-markets that offer superior talent access, infrastructure, and connectivity."

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

03

How Are GCCs Driving Expansion?

GCCs are not a separate story from the broader occupier market—they are the leading indicator for where the rest of the market is headed on expansion, AI adoption, and location choice

GCCs: The Sharper Edge of Demand

India's GCC ecosystem continues to strengthen its role as a major contributor to office demand, talent creation, and economic output. Underscoring their rising economic impact, GCCs in India achieved nearly USD 100 bn in revenue in FY2026 (up 22% since FY2021), driving ~2% of the national GDP[2] with projections to reach 2.2–2.8%[3] by FY2030.

Figure 3.1: India's GCC Ecosystem at a glance[1]

2,117+ Number of firms operating GCCs (FY2026)	Scale	**32%** Growth in numbers of GCCs since FY2021
2.36 million Total installed GCC talent FY2026	Workforce	**11%** Growth in talent base since FY2021

"This growth has been enabled by a favourable business environment, national policy reforms, supportive state-level incentives, and India's deep, highly skilled talent pool."

Source: 1. The GCC Value Orbit, NASSCOM, May 2026; 2. Decoding India's GCC Ecosystem: Bengaluru Edition 2026, Dun & Bradstreet, March 2026; 3. India's strategic GCC play for Japanese enterprises, Deloitte, June 2026; CBRE India Research Q3 2026

Figure 3.2: Scale and impact of GCC leasing activity

123+ million sq ft
Space leased by GCCs (2022 – H1 2026)

36%
Share of GCCs in total office leasing (2022 - H1 2026)

61%
Share of GCC leasing from Technology, BFSI and E&M corporates (2022-H1 2026)

Emerging growth verticals- Investment Firms & Private Equity Funds, Aerospace & Defence, Consumer Packaged Goods

Figure 3.3: GCC leasing by region (2022-H1 2026)

68% AMERICAS	27% EMEA	5% APAC

Note: BFSI- Banking, financial services, insurance; E&M- Engineering & manufacturing

The New Role of GCCs in India

India's GCC landscape is evolving beyond traditional scale expansion towards higher-value, capability-led growth. Centres are increasingly supporting enterprise transformation through product development, engineering, analytics, AI, cybersecurity and innovation-driven functions. This evolution is reinforcing the country's position as a strategic destination for global business capabilities.

Multi-functional and Capability-led GCCs

R&D and ER&D GCCs

Advanced centres driving engineering, product design, testing, and innovation, with a growing focus on core R&D mandates.

Digital AI and Data-led GCCs

Specialised hubs across AI, machine learning (ML), advanced analytics, cloud engineering, and cybersecurity, enabling analytical-driven decision-making and platform-led development.

Transformation-led and Agile GCCs

CoE-driven GCCs

Global centres of excellence (CoE) anchored in enterprise transformation, automation, and innovation scaling across geographies.

Mid-sized GCCs

Agile centres focused on specialised capabilities and evolving global mandates, offering a balance between scalability and operational flexibility.

Nano and Agile GCCs

Smaller, high-skill units focused on niche technologies and pilot mandates, enabling faster experimentation and rapid capability build-out.

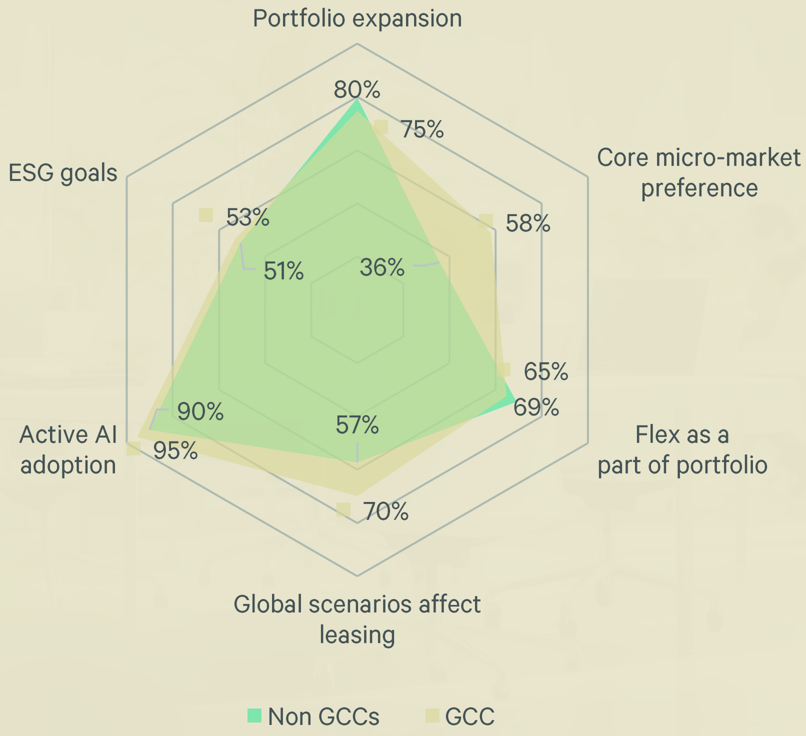
Source: The Policy Advantage Powering India's GCC Growth, CBRE, August 2026; CBRE Research, Q3 2026

Growth Signals from GCC Occupiers

India Office Occupier Survey 2026: Key GCC perspectives

GCCs are adapting more actively to emerging market shifts, particularly AI-driven workforce transformations and global economic uncertainties. Consequently, they show a stronger preference for core locations, leveraging infrastructure and optimised commutes as critical tools to attract and retain top talent.

Figure 3.4: GCCs Double Down on Expansion, AI Adoption and Core Market Locations



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

Enabling GCC Expansion: The National Policy Stack Behind India's GCC Growth

A broad national policy framework spanning talent development, digital infrastructure, innovation and business facilitation continues to support GCC expansion in India. Together, these initiatives create a supportive environment for investment, workforce expansion and capability development.

Digital and Physical Infrastructure

- Digital India Mission
- Software Technology Parks of India (STPI) Scheme
- Special Economic Zone (SEZs) Act, 2005
- Production Linked Incentive (PLI) scheme, 2020
- National Data Center Policy
- BharatNet Programme

Talent and Workforce Development

- Skill India Mission
- Skill India Digital / Digital Skilling Platforms
- FutureSkills PRIME (MeitY) 2018
- National Skill Development Mission
- Industry-Academia Collaboration Initiatives
- National Apprenticeship Promotion Scheme (NAPS) 2016

Business Confidence & Ease of Doing Business

- FDI Reforms
- Goods and Services Tax (GST) Reform Framework
- Insolvency and Bankruptcy Code (IBC)
- Ease of Doing Business Reforms
- Advance Pricing Agreements (APA) Framework, 2012
- Corporate Tax Reforms, 2019

Ecosystem Development & Innovation

- Startup India
- Make in India
- Atal Innovation Mission (AIM)
- R&D and Innovation Incentives (RDI) Scheme
- Tier-II & III Development Push
- National Strategy for Artificial Intelligence, 2018

Source: The Policy Advantage Powering India's GCC Growth, CBRE, August 2026; CBRE Research, Q3 2026

State-Level Policies: Building Competitive Advantage

State & Relevant Policies	Vision	Strategic Positioning	Key Policy Incentives
Karnataka (GCC Policy 2024-29)	~1,000 GCCs by 2029	Innovation-led GCC ecosystem with statewide expansion	Capex subsidy, talent incentives, rental assistance, infrastructure support, and property tax relief
Telangana (TS-iPASS, IT/ITeS, T-Hub, Task)	Multi-city GCC growth beyond Hyderabad	High-growth digital and R&D hub with a deep talent ecosystem	Fast-track approvals, innovation ecosystem support, and talent development initiatives
Maharashtra (GCC Policy 2025-FY2030)	400+ GCCs by FY2030	Dual-core BFSI and ER&D ecosystem with innovation-led expansion	Capex and rental subsidies, payroll incentives, power subsidy, and R&D grants
Haryana (GCC Policy 2026-2031)	100+ GCCs by 2031	Cost-efficient NCR extension with policy-led expansion	Capex and opex incentives, R&D support, and EPF reimbursement
Uttar Pradesh (GCC Policy 2025-2030)	Large-scale expansion of GCCs	Scale-oriented GCC destination with strong workforce and cost advantages	Capex support, opex reimbursement, payroll incentives, EPF reimbursement, land subsidy, and interest subsidy
Tamil Nadu (GCC Policy 2024-2027)	High-value ER&D GCCs	Engineering and manufacturing-led hub for ER&D and product development	Payroll support, land subsidies, and operational exemptions
Gujarat (GCC Policy 2025-FY2030)	250+ additional GCCs by FY2030	Emerging financial and industrial GCC hub built around GIFT City	Capex and opex subsidies, EPF reimbursement, interest subsidy, and quality certification support
Kerala (GCC Policy 2025-2030)	3X GCC scale (120 centres by 2030)	Talent-driven GCC ecosystem with low attrition and distributed growth	Capex support, land conversion and lease subsidies, property tax relief, stamp duty exemption, and R&D grants
Rajasthan (GCC Policy 2025-FY2030)	200+ GCCs by 2030	Cost-competitive GCC market with NCR connectivity advantages	Capex subsidy, payroll incentives, land and lease support, interest subsidy, and green certification support
Madhya Pradesh (GCC Policy 2025-FY2029)	50+ GCCs	Emerging GCC destination offering scalable and cost-efficient growth	Capex subsidy, payroll incentives, interest subsidy, R&D assistance, training support, and rental assistance
Andhra Pradesh (GCC Policy 2024-2029)	Deep-tech growth hub	Infrastructure-led GCC ecosystem anchored by Visakhapatnam	Capex subsidy, power tariff support, job creation incentives, and rental assistance

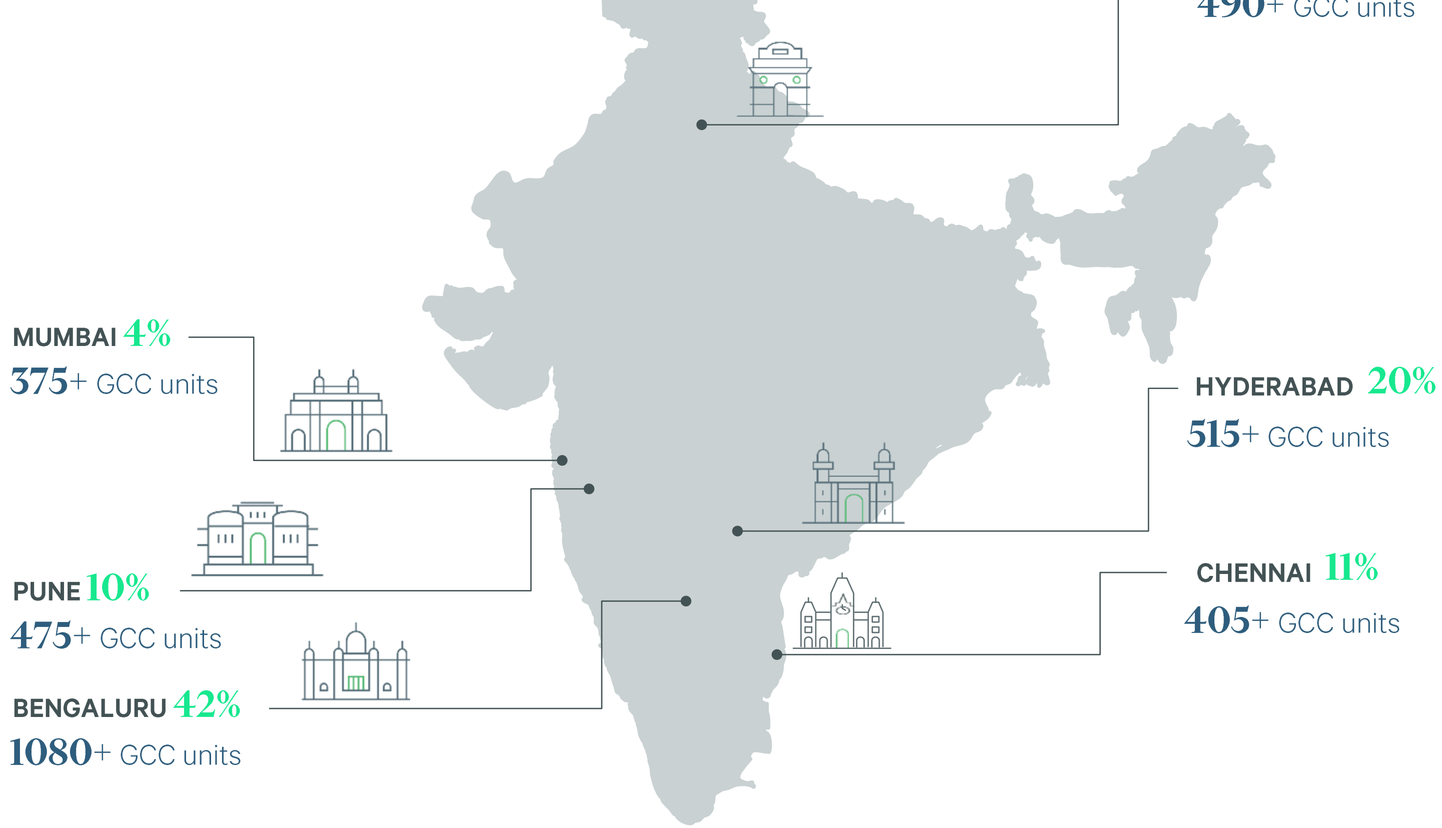
Source: The Policy Advantage Powering India's GCC Growth, CBRE, August 2026; CBRE Research, Q3 2026

Leading Markets Continue to Anchor India's GCC Expansion

Scale and Ecosystem Depth Sustain Market Leadership

India’s GCC activity remains concentrated in a select group of established markets that attract the largest share of occupier demand and expansion mandates. Bengaluru, Hyderabad, Delhi-NCR, Chennai, Pune and Mumbai benefit from deep talent pools, mature business ecosystems and high-quality office infrastructure, reinforcing their position as preferred destinations for global firms.
While emerging markets are gaining traction, these leading hubs continue to anchor India's GCC growth through their scale, talent depth and ability to support increasingly complex and strategic business functions.

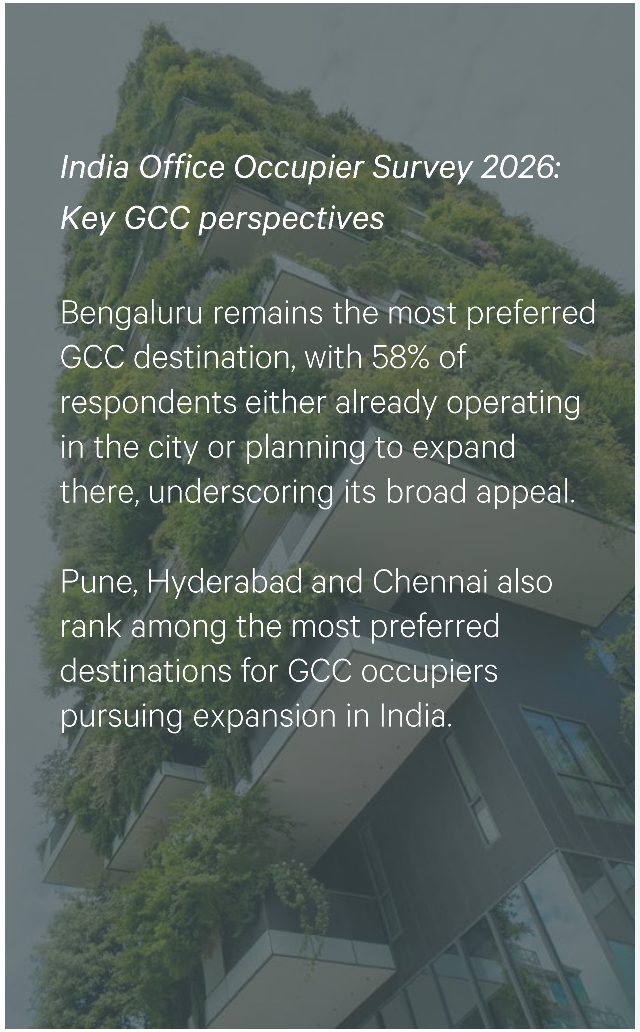
Figure 3.5: Geographic distribution of GCC units and leasing share (2022-H1 2026)



- GCC unit data sourced from The GCC Value Orbit, NASSCOM, May 2026
- Percentages represent GCC leasing share across tier-I cities, CBRE Research, Q3 2026

Source: CBRE Research, Q3 2026

Sectoral Strengths and Talent Scale Reinforce Market Leadership



India Office Occupier Survey 2026: Key GCC perspectives

Bengaluru remains the most preferred GCC destination, with 58% of respondents either already operating in the city or planning to expand there, underscoring its broad appeal.

Pune, Hyderabad and Chennai also rank among the most preferred destinations for GCC occupiers pursuing expansion in India.

Talent concentration and sectoral specialisation continue to underpin the leadership of India's major GCC markets. Bengaluru, Hyderabad, Pune, Chennai, Mumbai and Delhi-NCR combine deep talent pools with established industry strengths, enabling GCCs to align location decisions with specific business needs. While nearly 94% of India's GCC talent remains concentrated in tier-I cities, key emerging markets* are steadily building specialized talent pools and strengthening their role within the broader GCC ecosystem.

Figure 3.6: GCC talent distribution and dominant sectors across tier-I clusters (FY 2026)

Cities	Installed Talent Share (%)[1]	Key Sectors Driving Demand[2]
Bengaluru	34%	Tech, E&M, BFSI
Hyderabad	14%	LS, BFSI, E&M
Pune	13%	BFSI, E&M, Tech
Chennai	12%	BFSI, E&M, LS
Mumbai	11%	BFSI, RCA, Tech
Delhi-NCR	10%	Tech, RCA, BFSI

Note: Tech – technology; BFSI – banking, financial services, insurance; E&M – engineering & manufacturing; RCA – research, consulting & analytics; and LS – life sciences;
Emerging cities: Kolkata, Ahmedabad, Kochi, Vadodara, Coimbatore

Source: The Policy Advantage Powering India's GCC Growth, CBRE, August 2026; : CBRE's India Office Occupier Survey 2026, August 2026; CBRE Research, Q3 2026

04

Commute Infrastructure is Non-negotiable

Transit access has moved from an amenity to a deal-maker - or a deal-breaker.

Asset Selection Centre on Connectivity

Occupiers are increasingly favouring well-connected office locations that support talent attraction, workforce mobility and long-term business resilience. As commute and connectivity challenges persist, transit infrastructure has become a critical determinant of real estate decision-making.

India Office Occupier Survey 2026: Key perspectives on transit

Top most crucial criteria while considering office space

70%
Access to commute infrastructure

56%
Access to talent

The infrastructure concern converts directly into asset-selection behaviour. Occupiers are **more likely to reject a building over the lack of transit access than over any other sustainability and quality-of-life feature.**

18% are willing to pay a premium for public transport access

27% would reject or exit an asset without public transport access while 11% would seek a discount

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

"Transit accessibility continues to anchor asset selection, but core ESG parameters–from AQI performance to green certifications–have firmly transitioned from 'nice-to-have' perks into essential baseline criteria for occupiers."

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

05

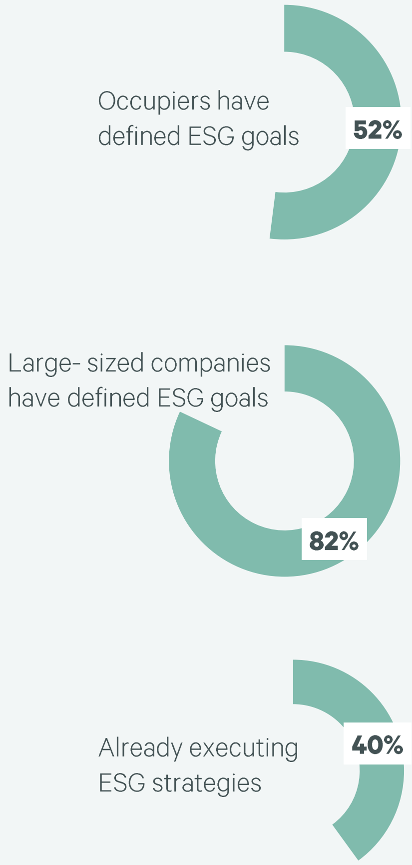
Beyond Compliance: Sustainability in Action

Over ~60% of India’s office stock is now green certified, yet only ~11% of occupiers are willing to pay a premium for it, signalling that sustainability has evolved from a differentiator to a baseline requirement.

ESG Moves from Commitment to Execution

India Office Occupier Survey 2026: Key ESG perspectives

State of ESG Maturity



Source: CBRE Research Q3 2026

What occupiers are doing today?

29%
occupiers conduct ESG audits

28%
firms operate from green-certified assets

24%
companies in India have already implemented water audits

96%
occupiers in APAC regularly assess physical climate risks as part of their long-term asset protection and operational continuity strategies

Next Wave of ESG Priorities
(What stakeholders are considering to implement next?)

38%
firms aim to Implement resource usage / waste reduction strategies

36%
companies planning to upgrade office with energy-efficient retrofits

76%
Developers in APAC plan to install onsite renewable energy systems

62%
occupiers in the APAC region plan to incorporate sustainable water management practices

"Stakeholders are shifting towards measurable operational actions, with energy efficiency upgrades, renewable energy adoption, and water stewardship initiatives emerging as the next frontier of value creation, resilience, and resource optimisation"

Renewable Energy Transition Reshaping Office Real Estate

India's energy landscape is undergoing a structural shift as the country works to meet soaring demand while progressively decarbonising its power mix. The national transition has reached an important milestone, with non-fossil fuel sources now accounting for 52% of its installed electricity capacity, achieved five years ahead of the 2030 target set under its Paris Agreement commitments.

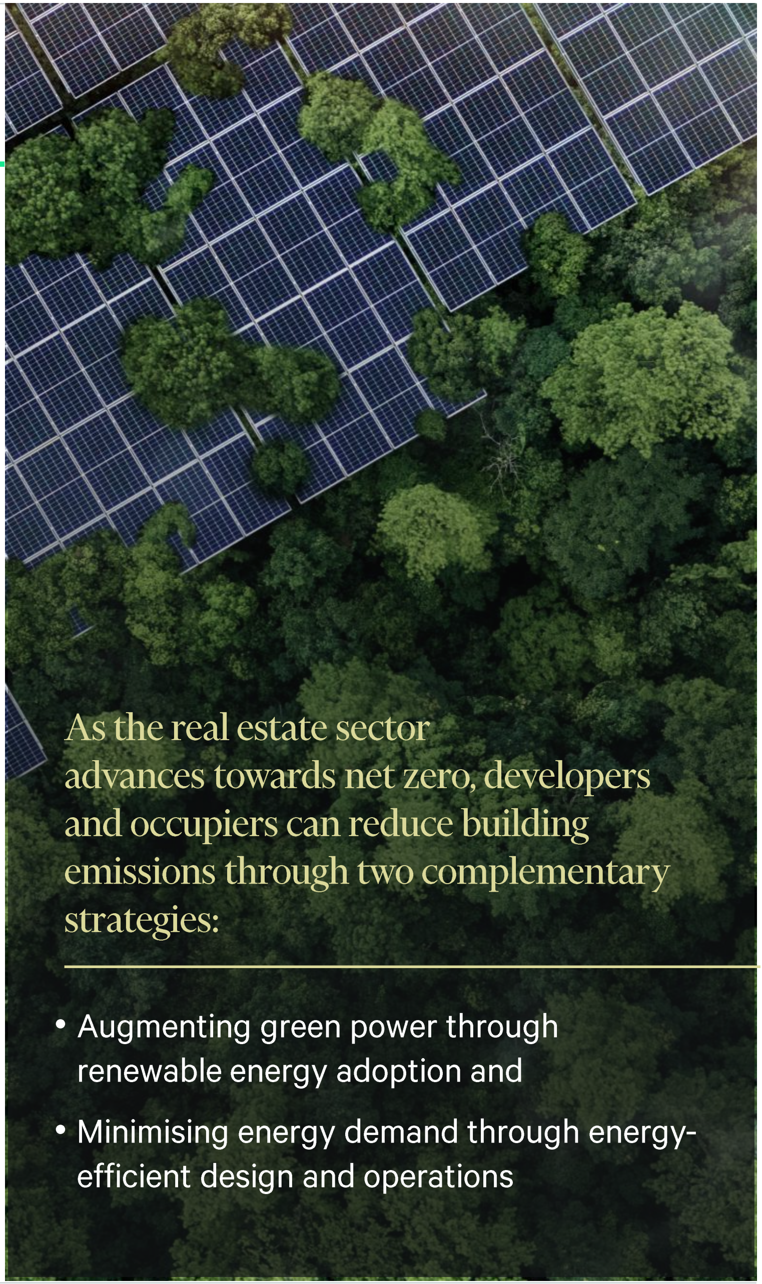
Figure 5.1: India's total installed power capacity

TOTAL INSTALLED POWER CAPACITY	NON-FOSSIL FUEL CAPACITY	FOSSIL FUEL CAPACITY
509.6 GW	262.7 GW	246.9 GW
	52%	48%

Figure 5.2: An analysis of prominent renewable energy sources in real estate developments[1]

	Solar	Wind	Bioenergy
Capital Cost	●○○	●●●	●●●
Impact on reducing carbon emission	●●●	●●○	●●●
Operational cost	●○○	●○○	●●○
Scalability	●●●	●●●	●○○
Current adoption in India	●●●	●●○	●●○

Source: 1. Ministry of New and Renewable Energy, December 2025; CBRE Research Q3 2026

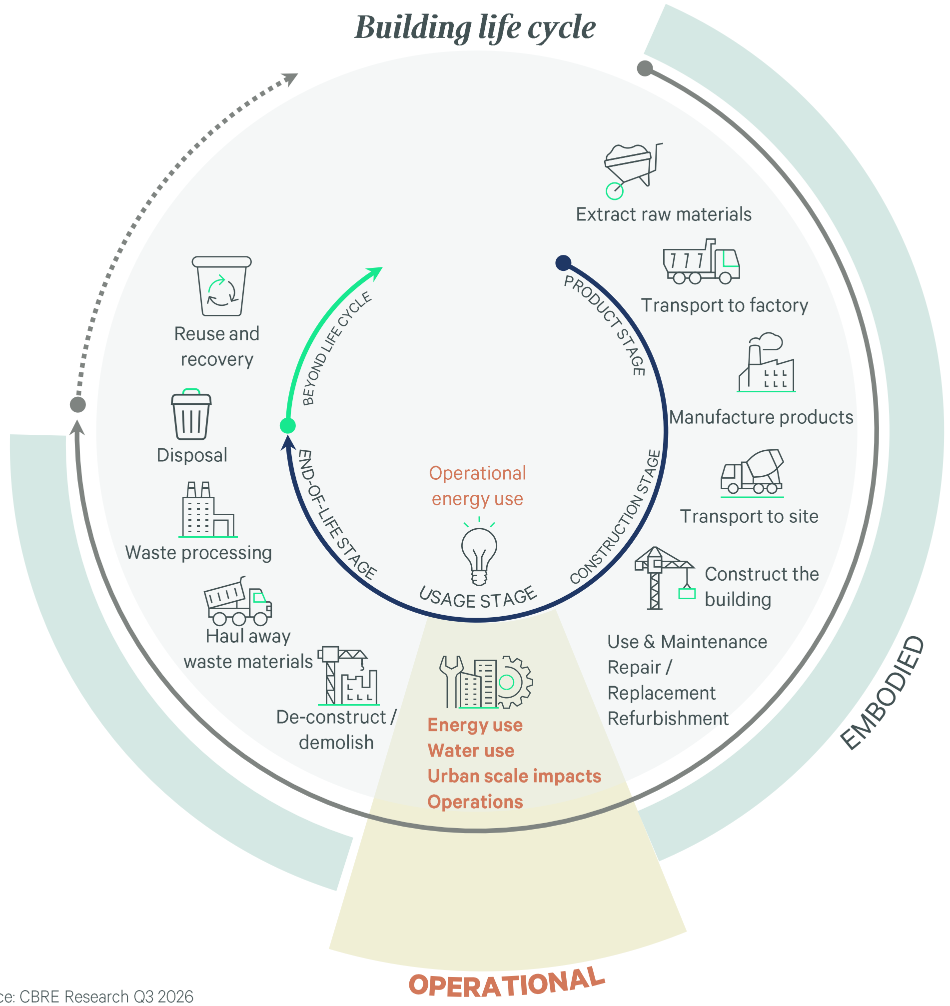


As the real estate sector advances towards net zero, developers and occupiers can reduce building emissions through two complementary strategies:

- Augmenting green power through renewable energy adoption and
- Minimising energy demand through energy-efficient design and operations

Building Lifecycle Energy Use and Pathways to Efficiency

Figure 5.3: Energy breakdown in a building lifecycle



Source: CBRE Research Q3 2026

Embodied energy:
Accounts for upto 40-50% of a building's lifetime emissions in high-performance buildings

Operational energy:
Accounts for 60-70% of total lifecycle emissions in a typical office building

"With operational energy forming a major share of a building's lifecycle emissions, targeted efficiency strategies at a building and campus level become essential to lowering overall energy demand"

Campus and building level strategies to minimise energy usage:

- Reduce heat gain and energy demand through efficient building design
- Use smart, energy-efficient lighting to lower power consumption
- Optimize performance through intelligent monitoring and analytics
- Improve cooling efficiency with advanced HVAC and smart controls

For further insights on the strategies and solutions outlined in this slide, refer to CBRE India Research's report "The ESG Blueprint: Augmenting Green Power and Optimising Efficiency in Modern Offices."

Water Stewardship: India's Growing Water Imperative

India is among the world's most water-stressed economies, with declining per capita water availability, increasing groundwater depletion and rising climate-related risks. As a result, water stewardship is rapidly becoming a defining measure of asset resilience, occupier confidence and long-term real estate value.

Figure 5.4: India's water stress reality

India's share in global population and water resources[1]

18% share in global population

4% share in global freshwater resources

Global ranking[2]

133rd in per Capita Water Availability

Water supply shortages ranked among top five national risks

Groundwater extraction[3]

Largest extractor of groundwater in the world, accounting for **25%** of the global extraction

Figure 5.5: Recent water availability trends across major Indian cities:

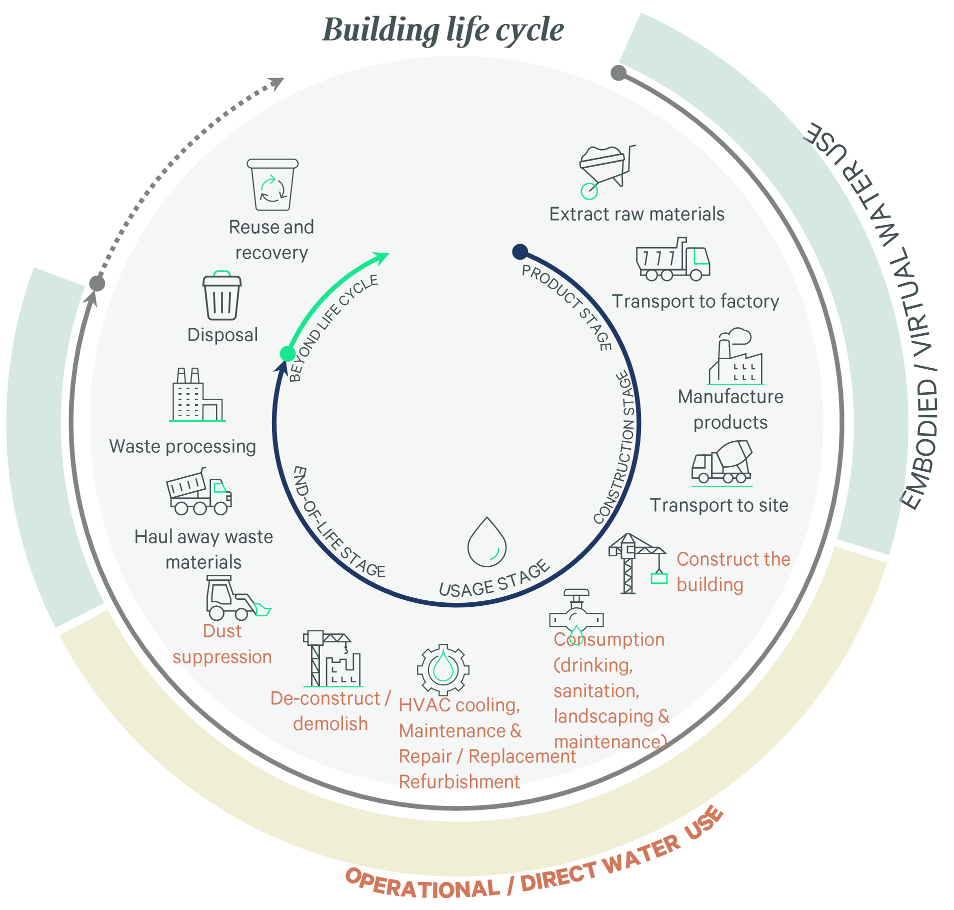
While Bengaluru, Mumbai and Chennai recorded relatively higher groundwater levels of ~3 mbgl in 2022-23 than most other cities, per capita water availability in these markets remains significantly constrained in 2025

Gurugram and Delhi recorded the lowest ground water levels (~30 & 13 mbgl, respectively) in 2022-2023

Source: 1. How policy, culture and mindset are key to shaping India's water future?, World Economic Forum, 2026; 2. WEF Global Risks Report, 2025; 3. National Water Mission, 2025; 4. Central Ground Water Board, Ministry of Jal Shakti, 2025; Note: *Water Stewardship is the transition from basic regulatory compliance to a comprehensive responsibility for how an organisation manages its impact on shared water resources and the local catchment; CBRE Research Q3 2026

Building Lifecycle Water Use and Pathways to Water Stewardship

Figure 5.6. Water footprint across various stages of the building life cycle



Source: CBRE Research Q3 2026

Embodied water:
Accounts for ~30-40% of the total water footprint across a 40-50-year building lifecycle

Operational water:
Accounts for ~60-70% of the total water footprint across a 40-50-year building lifecycle

"With operational water accounting for the majority of lifecycle consumption, targeted stewardship measures across building operations are critical to reducing overall water demand and advancing water resilience"

Roadmap to water stewardship for stakeholders:

Water Negativity

- Water risk assessments
- Sub-metering & leak detection
- Low-flow fixtures

Water Neutrality

- Rainwater harvesting
- Setting water intensity targets
- Increased treated water use

Water Positivity

- Blackwater treatment
- Watershed replenishment projects
- Setting time-bound targets

For a comprehensive overview of the water stewardship framework and best practices presented herein, refer to CBRE Research's "The ESG Blueprint: Strengthening Water Stewardship in Modern Offices."

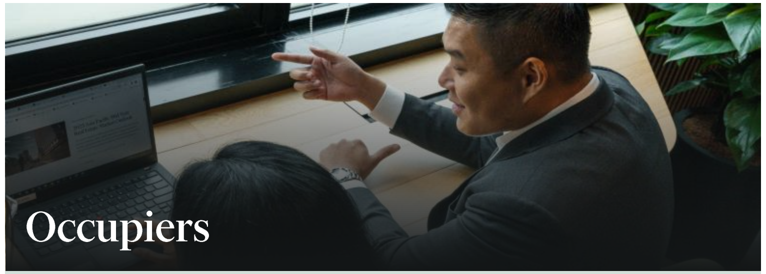
06

Outlook and Strategic Recommendations

Stakeholder Priorities for the Next Office Growth Cycle

Landlords

- Design AI-ready assets that combine smart building systems with reconfigurable spaces, rather than focusing solely on infrastructure
- Prioritise commute access and transit connectivity in site selection; treat it as core underwriting, not an amenity.
- Accelerate delivery of ESG-compliant, energy-efficient assets by factoring energy efficiency at design stage (passive design, lifecycle costing) and deploying smart metering and IoT.
- Prioritise retrofits of ageing stock during scheduled maintenance; Install water-efficient fixtures and closed-loop systems (greywater recycling, blackwater treatment) during modernisation cycles.



Occupiers

- Advance expansion decisions and planning early to secure limited core Grade A space; use flexible and managed formats for speed-to-market
- GCC occupiers could align expansion plans with state and central incentives to optimise setup and operating costs.
- Operationalise energy efficiency via occupancy analytics, optimise HVAC and implement green commute incentives.
- Embed water resilience into workplace strategy through stewardship initiatives, continuity planning and integrated reporting.

Government

- Strengthen single-window clearances, accelerate disbursements and improve policy predictability to build investor confidence.
- Engage with occupiers and developers regularly to track how AI-driven requirements are shifting demand.
- Expedite metro, flyover and road corridor delivery to improve accessibility and workforce mobility.
- Support renewable energy pathways and enable city-level systems and microgrids.
- Ensure reliable water infrastructure and enforce building standards for supply, drainage and rainwater management.

Source: CBRE Research, Q3 2026

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