The Director's Atlas

Sector Outlook



Market size and valuation

- ~US$5-8 bn, 2025/26E
- Commercial real estate services revenue
- GCC-led office demand

Primary economic engine

Global Capability Centre (GCC) leasing, REIT expansion, Grade-A offices and industrial logistics advisory.

Boardroom Focus

01 **Expand GCC workspace and logistics advisory**

02 **Structure GIFT City commercial real estate funds**

03 **Scale AI site selection and valuation platforms**

For Business, Finance and Function Directors:
A starting point for roundtable conversations on growth, resilience and stakeholder alignment.

Transformations Our Programs Deliver

OUR COACH

For Business, Finance and Function Directors

Two outcomes	Foresight to lead through disruption. Influence to align stakeholders before action. Camera confidence, eloquence, vocal gravitas and a six-week peer network.

01 ENTERPRISE RESILIENCE

Foresight → Recognised Strategic Leadership

INSIDE YOUR COMPANY

Be recognised as the director who identifies structural shifts early and turns them into a clear agenda for investment and action.

OUTSIDE YOUR COMPANY

Build a reputation for judgement that clients seek by name, partners trust and competitors benchmark against.

02 STAKEHOLDER ALIGNMENT

Functional Authority → Enterprise-wide Influence

INSIDE YOUR COMPANY

Build a function backed by peers and the C-suite. Articulate ideas with clarity, eloquence and vocal gravitas, with confidence in the room and on camera.

OUTSIDE YOUR COMPANY

Be known for ethical influence and strategic judgement, supported by a trusted peer network built over six weeks.

Five paradigm shifts

What changes the basis of competition

01 Structural

Brokerage commissions → integrated asset and occupier platforms.

02 Technology

Broker spreadsheets → AI valuations and connected buildings.

03 Evidence and trust

Word of mouth → verified leasing, title and sustainability data.

04 Economics

One-off commissions → recurring advisory and management fees.

05 Socio-cultural

Rent-led choices → workplace amenities, talent access and commute.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Which of these shifts could change your competitive position - and which is missing from your leadership agenda?

Opportunity & Disruption

Where value can move in commercial real estate services

01 Market opportunity

GCC workspace design and build, REIT advisory, logistics leasing and AI valuation.

02 Disruption

Fit-out inflation, talent attrition, title-clearance delays and currency hedging friction.

03 Sector impact

Higher occupier costs shift demand to fitted space; talent and title risks lengthen deal cycles.

04 Strategic response

Use predictive site selection, INR property debt funds and automated flex-office management.

Opportunity → Disruption → Impact → Strategic Response

Sector Movement

Signals to fund, reshape or leave behind

EVOLVE

Reshape existing lines

Occupier services, industrial brokers, REIT managers and property technology platforms.

SURGE

Scale emerging lines

GCC design-and-build firms, GIFT City capital desks, logistics advisory and AI leasing.

SHRINK

Reduce exposure

Low-grade brokerages, manual lease administration and unhedged capital desks.

SUNSET

Exit structurally weak models

Paper-based title checks, manual valuation desks and unhedged USD property funds.

FOR YOUR NEXT LEADERSHIP DISCUSSION

What should your business fund, reshape or stop - and where does the leadership team disagree?

Governance Agenda

Regulatory and board priorities

01 Regulatory drivers

- RERA and SEZ requirements, including denotification
- IFSCA fund frameworks and FEMA/RBI investment rules
- DPDP controls for client, occupier and visitor data

02 Board oversight priorities

- Expand GCC workspace and logistics advisory mandates
- Structure GIFT City funds and manage currency exposure
- Embed AI property tools with data and model governance

Director's Future Role

Strategy, finance and operations

Strategy

Track GCC pipelines, model REIT and logistics demand and assess PropTech acquisitions.

Transformation

Shift advisory to AI site selection, valuation and flex-office management.

Finance

Structure property funds, manage currency risk and optimise INR lease yields.

Risk & Compliance

Assess titles, RERA and SEZ exposure, investment rules and client-data controls.

Operations

Improve facilities workflows, predictive maintenance and digital fee collection.

Supply Chain

Source fit-out materials and manage contractors, facilities and technology vendors.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Are strategy, finance and operations working from the same assumptions about growth, investment and risk?

Director's Future Role

Commercial, customer and product

Quality & Excellence

Standardise due diligence, audit AI valuations and assure client service quality.

Business Development

Win GCC design-and-build mandates, logistics leasing and property fund partnerships.

Sales

Win occupier leasing, landlord and REIT mandates and logistics tenant pipelines.

Marketing

Position advisory around GCC expertise, technology and India cost advantages.

Client Experience

Support occupiers after leasing with flex-office portals and portfolio insights.

Product & Technology

Build AI site-selection and valuation tools, flex portals and digital billing.

Director's Future Role

Data, people and governance

Data & Analytics

Track leasing and absorption, forecast GCC demand and analyse REIT portfolios.

Information Security

Secure deal rooms, property platforms, building devices and occupier information.

People & Culture

Recruit property technology talent and train brokers in AI and GIFT City finance.

Learning & Development

Build skills in valuation analytics, property regulation and GCC advisory.

Legal

Structure property investment ventures, protect valuation models and draft INR contracts.

ESG & Sustainability

Monitor building safety, indoor air quality and sustainable workplace standards.

Turn Sector Intelligence into Enterprise Action

For Business, Finance and Function Directors

Which business priority needs clearer direction or stronger support?

EXPLORE ROUNDTABLE THEMES

01 Enterprise Resilience

Turn disruption into growth with a financially grounded resilience roadmap.

02 Enterprise Transformation

Convert strategy into execution, ownership and measurable change.

03 Stakeholder Alignment

Move from functional authority to enterprise-wide influence.

Let others see the capability those closest to you already recognise.

Grow in confidence, express yourself with eloquence, and become more recognised for the value you bring.

REQUEST AN INVITATION

Discuss your priority on WhatsApp

Bring one live business challenge. Let’s explore which roundtable is relevant to your priorities.

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