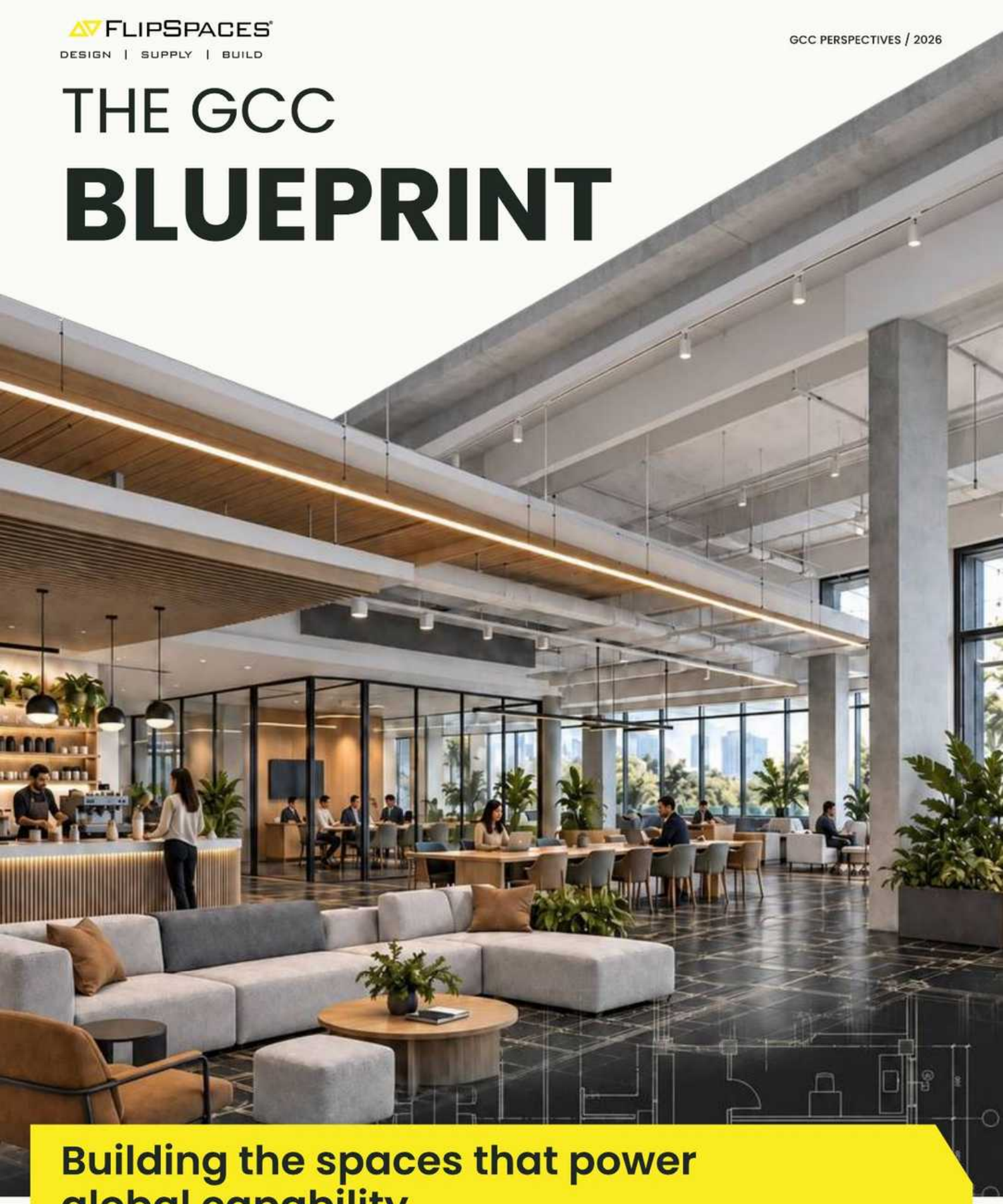
THE GCC BLUEPRINT



Building the spaces that power global capability

Capital, capability, and the built environment of the next generation of GCCs

A Flipspaces perspective on how global enterprises are changing where they build, what they build, and the spaces required to support it.

Executive summary

GCCs are moving from delivery to ownership, and the workplace is moving with them: from an accommodation decision to part of the infrastructure through which enterprise capability is built.

96%

product or portfolio mandate[1]



64%

dual global and site roles[1]

The mandate has changed. 96% of India's GCCs set up after FY2021 launched with a product or portfolio mandate, and 64% of site leaders now hold dual global and site roles.[1]

Occupiers are saying it too. 65% of occupiers in India name brand and culture-led design as their key workplace focus, and 70% of GCCs prioritise workplace design and identity as a branding and talent-attraction tool.[2]

The gap is the opportunity. Only 5% of India's GCCs operate as Transformation Hubs,[1] and only 8% of GCCs have advanced on innovation, differentiation and efficiency together.[3]

Technology alone does not close the gap. 92% of occupiers are piloting AI in corporate real estate, but only 5% have achieved all of their programme goals.[4]

Lifecycle matters more than handover. Recurring fit-outs can exceed a building's base carbon footprint by up to four times over its life.[5]

The sections that follow set out what this means for where enterprises build, what they build, and how the spaces that support that ambition should be conceived, designed and delivered.

Contents

BEYOND THE BLUEPRINT

01 The GCC is no longer just a destination 04

02 Capital is following capability 08

03 Transformed role of the workplace 16

04 Disruption in the scale monotony 26

05 From smart spaces to smarter systems 32

06 The most sustainable space may be the one that can change 35

07 The future workplace will be responsive 38

08 Capital. capability. place. 57

CHAPTER

The GCC is no longer just a destination

01

It is becoming an enterprise engine. Global Capability Centres are moving beyond delivery and scale to own products, technology, R&D, AI, and critical business functions.



From offshore capacity to global capability

The story of the Global Capability Centre is, in many ways, the story of how the global enterprise itself has changed.

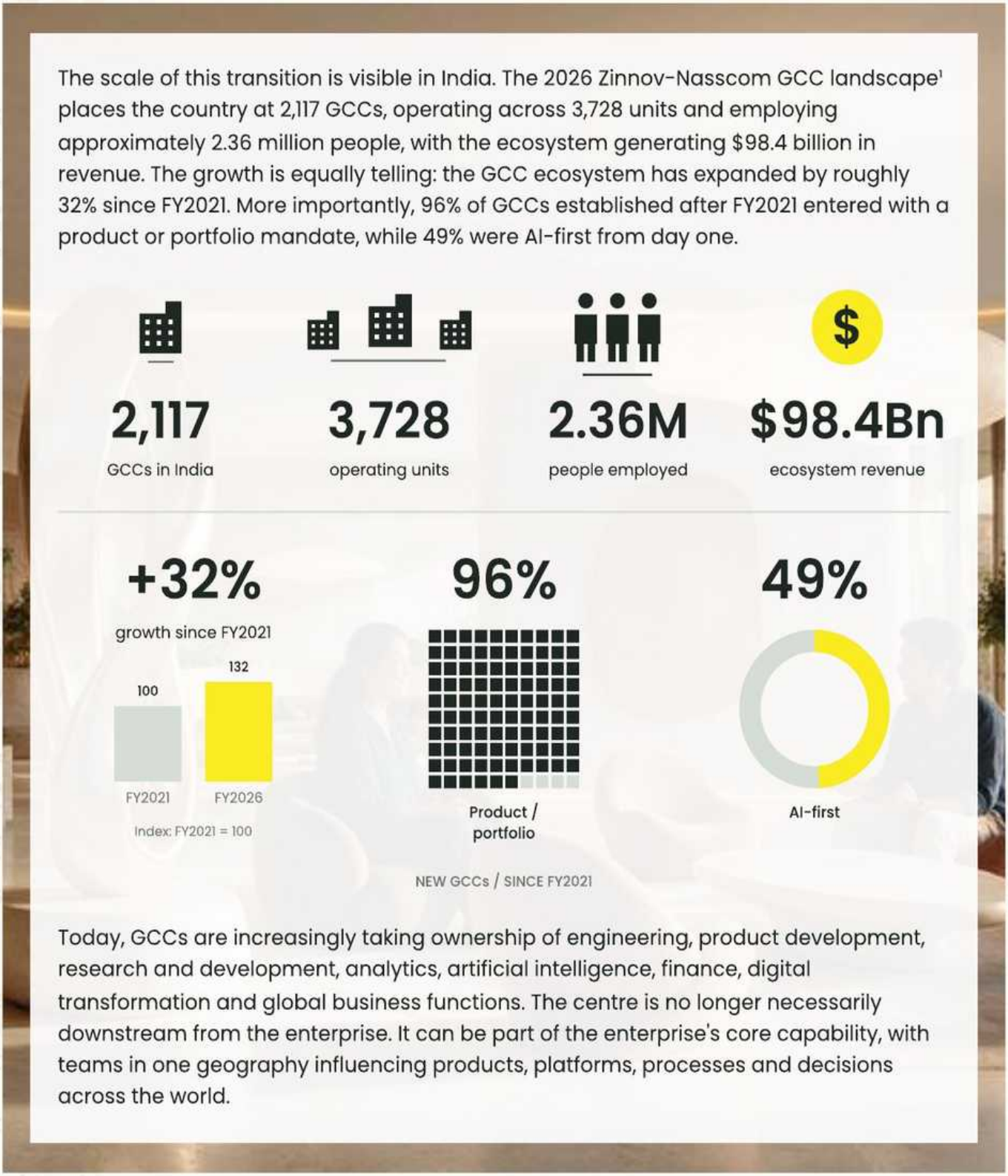
The first generation of GCCs was built around a relatively straightforward proposition. Global organisations could access skilled talent, extend operational capacity and improve the economics of delivering work by establishing teams in markets beyond their headquarters. Geography was, first and foremost, a question of efficiency. The office was an infrastructure decision: a place to accommodate people, standardise processes and provide the operating capacity the enterprise needed.

That model has not disappeared. It has simply become one layer of a much larger story.

CHAPTER 01 / SCALE AND MANDATE

India's GCC ecosystem at a glance

The scale of this transition is visible in India. The 2026 Zinnov-Nasscom GCC landscape[1] places the country at 2,117 GCCs, operating across 3,728 units and employing approximately 2.36 million people, with the ecosystem generating $98.4 billion in revenue. The growth is equally telling: the GCC ecosystem has expanded by roughly 32% since FY2021. More importantly, 96% of GCCs established after FY2021 entered with a product or portfolio mandate, while 49% were AI-first from day one.



Today, GCCs are increasingly taking ownership of engineering, product development, research and development, analytics, artificial intelligence, finance, digital transformation and global business functions. The centre is no longer necessarily downstream from the enterprise. It can be part of the enterprise's core capability, with teams in one geography influencing products, platforms, processes and decisions across the world.

Figure 1 · India's GCC ecosystem at a glance, FY26. Source: Zinnov-Nasscom.[1]

CHAPTER 01 / THE ENTERPRISE NETWORK

Those numbers tell a story that is bigger than expansion.

They show a shift in what enterprises are choosing to build in new geographies.



TALENT + TECHNOLOGY



CULTURE + CONNECTION

The newer GCC is increasingly an investment in capability. It brings together specialised talent, technology infrastructure, leadership, intellectual property, R&D, data, suppliers and physical infrastructure in pursuit of a longer-term enterprise mandate. In other words, capital is not simply following work. It is being deployed to build the conditions in which new forms of work, knowledge and enterprise value can be created.

This is why the GCC story cannot remain an India-only story, even though India is one of its most developed expressions. The same strategic question is playing out across different geographies, from Asia and Central and Eastern Europe to Latin America. Organisations are building distributed capability networks that allow them to access different talent pools, operating environments and innovation ecosystems.

The geography of the enterprise is becoming more distributed.

But distribution does not mean fragmentation. It means that the enterprise is learning to build capability in more than one place, while connecting those places into a larger organisational system.

CHAPTER 01 / FROM ACCESS TO OWNERSHIP

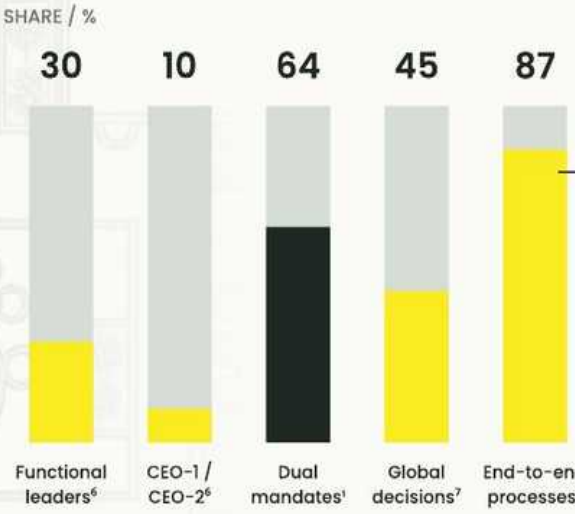
That shift changes the question.

> It is no longer simply, 'Where can we access the right talent at the right cost?'

It is increasingly, 'where can we build the capability our enterprise will need next?'

And once that becomes the question, the physical environment around the GCC starts to matter very differently.

Evidence: leadership is moving into the GCC





The shift is not only in the work. About 30% of functional leaders now sit in GCCs, and about 10% of CEO-1 and CEO-2 roles are based there, by the estimate of a McKinsey senior partner.[6] In India, 64% of GCC site leaders hold dual mandates that combine global functional ownership with site leadership.[1]

EY's 2025 GCC Pulse Survey found that 45% of GCCs take part in global decision-making and 87% own end-to-end global processes.[7] When leadership sits in the centre, the centre needs the spaces leadership work depends on: rooms for confidential decisions, settings to host headquarters teams and clients, and environments that express the organisation's identity to the people it hires.

Sources: McKinsey senior partner estimate[6]; Zinnov-Nasscom[1]; EY GCC Pulse Survey 2025.[7] Different measures; not additive.

CHAPTER

Capital is following capability

02

And capability needs somewhere to take shape. As enterprises invest in talent, technology, IP and leadership, the physical environment becomes part of the infrastructure enabling that ambition.



When capital builds capability, space becomes strategic

A GCC is not only an operating unit. It is a long-term allocation of enterprise resources into a geography.

Some of that allocation is visible in the office itself. Much more of it is not. It sits in specialised people, technology platforms, data infrastructure, research facilities, leadership teams, intellectual property, local partnerships and the networks that form around them. The physical workplace is therefore one part of a much larger investment decision.

CHAPTER 02 / A LONGER TIME HORIZON

The mandate can evolve

That distinction matters because the capital invested in capability has a different time horizon from the lease cycle of an office.



504

PE-backed GCCs[1]

506

Forbes Global 2000 companies represented[1]

An enterprise may enter a market with one mandate and find itself building something much larger five years later. A delivery centre can become a product centre. A technology team can become a global engineering hub. A regional function can acquire global ownership. The organisation changes because the capability being built creates new possibilities.

Zinnov's current GCC landscape[1] captures this movement through a broader shift from delivery engines towards enterprise nerve centres. Its data also points to the increasing presence of large global enterprises and private-equity-backed organisations within the GCC ecosystem, with 504 PE-backed GCCs and 506 Forbes Global 2000 companies represented in the Indian landscape.

The implication for the built environment is significant.

Spaces should be designed with the evolution of the mandate in mind

CHAPTER 02 / THE WORKPLACE BRIEF

Designing for change

If capital is being deployed to build capability, the physical asset should help that capability compound rather than constrain it. A workplace that becomes obsolete whenever the organisation changes is not simply inconvenient. It can make a long-term enterprise investment less responsive.

This is where design and build becomes part of the capital conversation.

The question is no longer only whether a project is delivered on budget and on time. It is whether the environment can continue to serve the value proposition that justified the investment in the first place.

Technology

Procurement



Operational realities

Future adaptability

That means designing for change without designing for waste. It means understanding how teams actually work rather than assuming how they will work. It means connecting spatial decisions to technology, procurement, operational realities, and future adaptability.

The office stops being a container around capability.

It becomes part of the infrastructure through which capability is built.

CHAPTER 02 / CAPITAL AND CAPABILITY

The capital behind the GCC workplace

GCCs are now the largest single source of office demand in India. They leased 31.3 million sq ft in 2025, 38% of all office leasing,[8] and every major property consultancy puts their 2026 share at around four in ten leases or more. The figures differ by firm and period, so each is shown with its source.



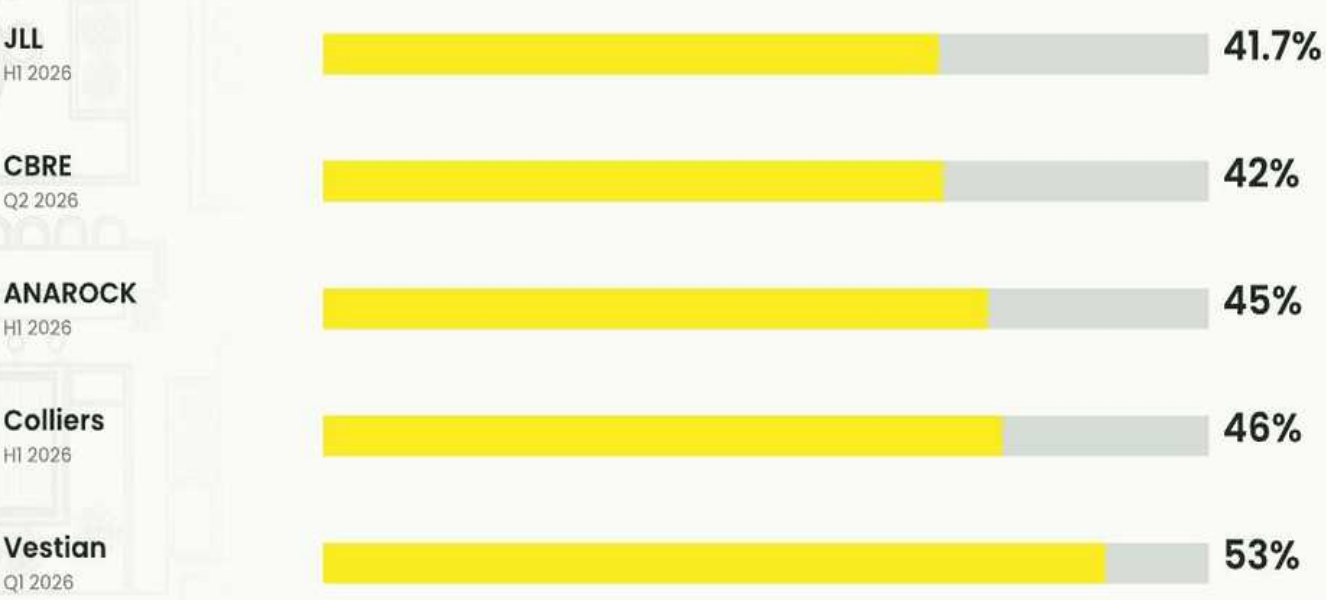


Figure 2 · GCC share of India office leasing in 2026, by firm. Sources: JLL,[9] CBRE,[10] ANAROCK,[11] Colliers,[12] Vestian;[13] 2025 reference: JLL.[8] 2025 full-year reference: 38% (JLL). Different firms and periods; not additive.

CHAPTER 02 / CAPITAL AND CAPABILITY

The investment behind the fit-out

The capital mix is broadening too: alongside 504 PE-backed GCCs, Zinnov counts 583 mid-market GCCs in India.[1] The fit-out itself is a material and rising commitment. Cushman & Wakefield prices a collaborative hybrid workplace at INR 5,847 to 6,567 per sq. ft. across India's main metros, and 77% of contractors expect to raise prices within six months.[14]



77%

contractors expect to raise prices within six months[14]

At the other end of the lease, reinstating a space in Asia Pacific costs about USD 235 per sq. m. on average.[15]

City	Collaborative hybrid fit-out cost (INR per sq. ft., 2026)
Mumbai	6,567
Delhi	6,207
Bengaluru	6,027
Hyderabad, Pune, Chennai, Ahmedabad, Kolkata	5,847

Table 1 · Fit-out cost of a collaborative hybrid workplace by city. Source: Cushman & Wakefield.[14]

CHAPTER 02 / CAPITAL AND CAPABILITY

The GCC maturity ladder and the workplace brief

Most of India's GCCs sit in the middle of the maturity ladder, which is exactly where a workplace brief is most likely to be outgrown.

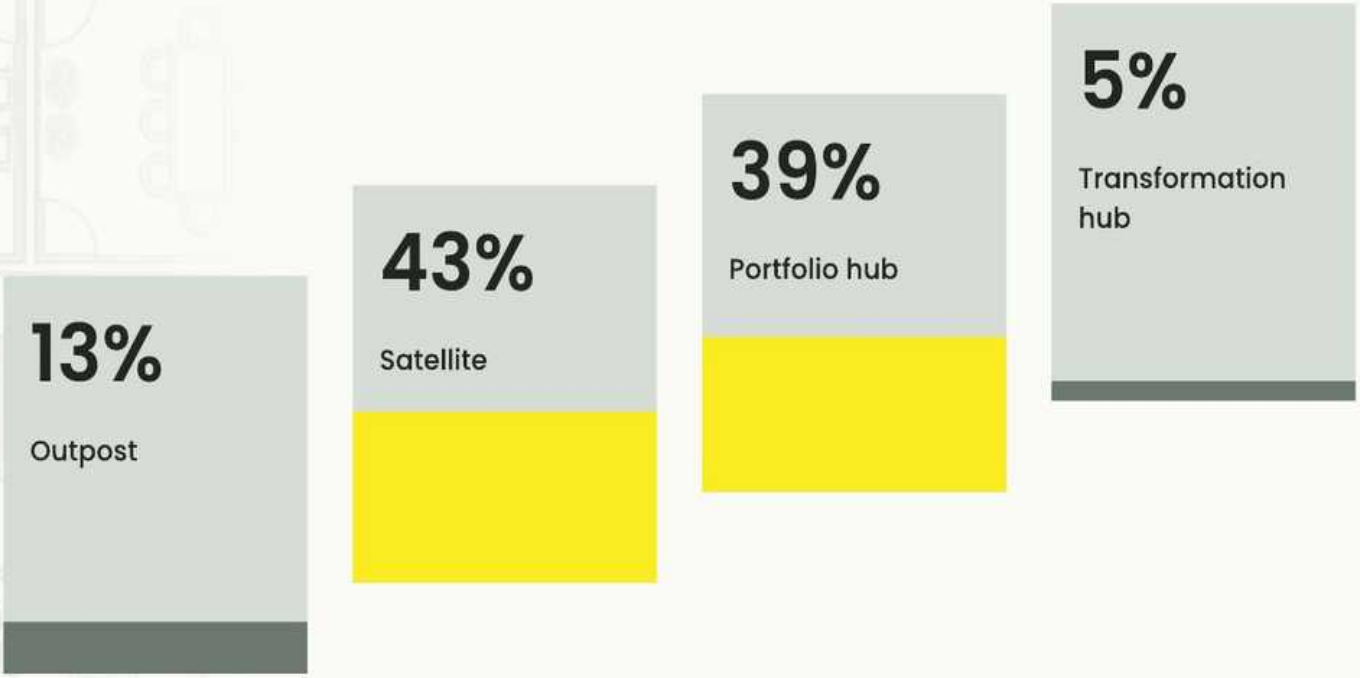


Figure 3 · Share of India GCCs by maturity stage, FY26. Source: Zinnov-Nasscom.[1]

Zinnov classifies GCCs into four maturity stages: Outpost, Satellite, Portfolio Hub and Transformation Hub.[1] Each stage asks something different of its workplace. The risk sits in the transitions, when a space briefed for one stage meets the mandate of the next.



82% are Satellites or Portfolio Hubs.

CHAPTER 02 / CAPITAL AND CAPABILITY

The workplace brief: outpost to satellite

Outpost

What the workplace must do	Design and build implication	Risk if the brief is wrong
Speed to first seat; secure, compliant zones from day one; a modest but deliberate brand presence	Set brand, security and specification standards now so they carry into later phases; plan for expansion rights	Temporary space quietly becomes permanent, and the next phase starts from zero

Satellite

What the workplace must do	Design and build implication	Risk if the brief is wrong
Efficient density with a real mix of focus and collaboration settings; client or project segmentation; room to grow	Modular infrastructure and demountable elements in the zones most likely to change; one kit of parts across floors	Desk-heavy layouts that cannot absorb a deeper mandate without a rebuild

Table 2 · What each maturity stage asks of the workplace. Stage names: Zinnov;' workplace requirements: Flipspaces framework.

CHAPTER 02 / CAPITAL AND CAPABILITY

The workplace brief: portfolio to transformation

Portfolio hub

What the workplace must do	Design and build implication	Risk if the brief is wrong
Product-team neighbourhoods, labs and technical spaces, leadership and headquarters-visitor spaces, learning spaces, stronger brand expression	Integrated technology and AV standards; specialised spaces with utilisation tracking; local identity layered on global DNA	An identity gap with headquarters; talent leaves for better environments; labs sit underused

Transformation hub

What the workplace must do	Design and build implication	Risk if the brief is wrong
A flagship node of the enterprise brand; innovation studios; client and executive experience; high adaptability	Scenario-tested design, lifecycle carbon targets and post-occupancy measurement written into the brief	An over-built flagship that is hard to adapt when the next mandate arrives

The practical lesson is to brief for the stage the centre is heading towards, not only the one it is in. Standards set at the Outpost stage decide how much of the space survives the move to Portfolio Hub.

CHAPTER

Transformed role of the workplace

03

Not just to accommodate people, but to enable performance. The next-generation GCC workplace must support focus, collaboration, connection, adaptability and the changing ways organisations operate.



The office becomes part of the enterprise

This transformation is already visible in the expectations placed on GCC workplaces.

JLL's 2026 India research[16] describes the emerging GCC environment as more purpose-built, sustainable and human-centric, with a stronger emphasis on varied work styles and more intentional occupancy. Its findings indicate that 60% of GCC occupiers prefer hospitality-style environments, while 47% of the workday is spent on individual focus work.[8]

Together, those figures reveal an important tension. The workplace needs to create the energy of a shared environment without assuming that all work happens collectively.

CHAPTER 03 / PEOPLE AND PERFORMANCE

What the workplace makes possible

The old workplace could be planned around a relatively stable ratio of desks, meeting rooms and support functions. The emerging workplace has to accommodate a spectrum of behaviours. A product team may need intense periods of individual concentration followed by rapid collaboration. A leadership function may need confidentiality and connection. An innovation team may move between workshops, focused work and informal exchange. A new employee may need spaces that help them understand the culture of the organisation as much as spaces that help them complete a task.

The physical brief therefore becomes less about accommodation and more about enablement.

That is the deeper change.

The next generation of GCC spaces will not be defined simply by how much space they occupy. They will be defined by what that space makes possible.

And that changes the starting point for design.

Evidence: occupiers now rank brand and culture first

> In CBRE's 2026 India Office Occupier Survey, 65% of occupiers said brand and culture-led design is their key workplace focus, and 70% of GCCs said they are prioritising workplace design and identity as a branding and talent-attraction tool.[2] JLL describes GCC offices as "purpose-built spaces designed to attract elite talent and reflect an organisation's global purpose."[16]

Research on candidates points the same way. In experiments published in the Journal of Environmental Psychology, creative workspace design made organisations more attractive to candidates by raising their perceived capacity to innovate, and the effect was weaker where spaces were simply expensive.[17]



CHAPTER 03 / PEOPLE AND PERFORMANCE

Talent is the asset

Talent is the constraint GCC leaders name most often, and the workplace is one of the few levers they fully control.

67% of India GCC leaders say talent retention or skill gaps hold them back from becoming innovation hubs.[18] The skills they hire for are changing fast: about 65% of new GCC roles created in 2026 require AI skills,[19] and 32% of India's workforce are "Frontier Professionals" in Microsoft's 2026 Work Trend Index, double the 16% global average.[20]

Engagement is under pressure. Gallup's 2026 State of the Global Workplace puts employee engagement in India at 23%, down from 30%.[21] Gallup attributes most of that to managers rather than buildings, which is the right caution: a workplace does not create engagement on its own. What it can do is support the conditions that keep people.



67%

leaders cite retention or skill gaps[18]



32% India / 16% globally
"Frontier Professionals"[20]

CHAPTER 03 / PEOPLE AND PERFORMANCE

What this means for the brief

01

First impression

Design the candidate's first visit. The space is evidence of the culture on offer, and it is seen before the offer letter.



02

Learning

Plan for learning, not only production. Onboarding, mentoring, and learning settings help new hires understand the organisation, not just complete a task.



03

Access

Treat the commute as a design input. 70% of occupiers in India rank commute as the most important factor in choosing an office location.[2]



CHAPTER 03 / PEOPLE AND PERFORMANCE

From fixed spaces to fluid ecosystems

For decades, workplace planning benefited from certainty. Headcount could be translated into workstations, workstations into floor plates, and floor plates into a relatively predictable construction programme.

But certainty is becoming harder to sustain.

Business functions evolve. Teams expand and contract. Hybrid working changes patterns of occupancy. Technology changes the nature of work. GCC mandates can deepen faster than their original workplace brief anticipated.

A fixed workplace is therefore being asked to support a fluid organisation.

> CBRE's 2026 India Office Occupier research reflects this wider shift in corporate real estate strategy. Three in four occupiers surveyed plan to expand their office portfolios, while around 30% expect portfolio growth of more than 30%, up from 18% the previous year.[2] Expansion at that scale makes flexibility more than a workplace trend. It becomes a question of how intelligently organisations can grow without repeatedly rebuilding their physical infrastructure.

The answer is not to make every space infinitely flexible. That would simply replace one form of rigidity with another. The answer is to understand where adaptability creates value.

Some environments need to remain stable. Others should be capable of being reconfigured.

Infrastructure should allow change where change is likely. Materials and components should be selected with their future replacement or reuse in mind. Growth should be possible without creating unnecessary stranded space.

The future workplace is therefore better understood as an ecosystem of possibilities than as a collection of fixed functions.

The best space may not be the one that tells people exactly how to use it.

It may be the one that gives the organisation more intelligent choices.



CHAPTER 03 / PEOPLE AND PERFORMANCE

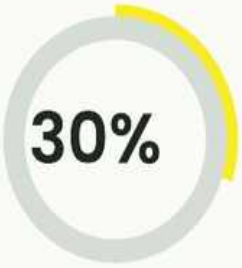
Flexibility is mainstream, but it has to be designed



GCC share of flex seats H1 2026[22]



Expect flex space within two years[2]



Want reconfigurable floor layouts[2]

GCCs took 44% of the flex seats leased in India in H1 2026, up from 37% in 2025.[22] 67% of occupiers expect flexible space in their portfolio within two years, up from 58% today, and 30% want adaptive, reconfigurable floor layouts.[2]

Flexibility is not automatically good for the organisation, though. A 2025 study of 2,025 office employees in the UK, France, Germany and Italy found that shared rooms and flex offices lowered how employees rated their employer's brand, and that lower ratings raised their intention to leave.[23] Adaptability works best when it is designed into infrastructure and settings, rather than defaulted to desk-sharing.

JLL's 2026 design research points to how plug-and-play infrastructure and modular partition systems that let layouts change "in three months, three years or thirty years".[24]



CHAPTER 03 / PEOPLE AND PERFORMANCE

What makes a GCC workplace different

A GCC is not a generic office. It carries requirements that come from its parent enterprise, its clients, and its regulators, and those requirements grow as the mandate deepens.

Requirement	What it asks of the workplace / Evidence
Secure and client-specific zones	Segmented, access-controlled zones for the parent's data, IP and client work, able to scale as new functions arrive **AI is expected to shift demand towards premium spaces with "high-performance digital infrastructure, secure data zones, and adaptable layouts for specialised talent"[25]**
Regulated sectors	Stricter compliance, audit and data-handling requirements built into the brief **BFSI GCCs leased a record 7.32 million sq ft in H1 2026, 36% of all GCC leasing[26]**
Labs and technical spaces	Labs, device rooms and specialised studios for engineering, R&D and AI mandates, planned and measured like any other asset **Technical spaces are about 23% of portfolios and run at 45% utilisation against a 72% target[27]**



CHAPTER 03 / PEOPLE AND PERFORMANCE

A brief built for global responsibility

Round-the-clock working	Teams aligned to headquarters time zones need lighting, food, transport, safety and rest settings that work outside local daytime hours **Design consideration**
Headquarters and client experience	Spaces for visiting executives and clients: briefings, demonstrations and confidential meetings **About 10% of CEO-1 and CEO-2 roles are now based in GCCs[6]**
Continuity and resilience	Power, network and IT redundancy so global processes continue through local disruption **87% of GCCs own end-to-end global processes[7]**



These requirements are where a GCC brief differs most from a conventional office brief, and where decisions made late are most expensive to reverse.

Table 3 · Requirements that set a GCC brief apart. Sources as numbered.

CHAPTER 03 / PEOPLE AND PERFORMANCE

From workplace design to human performance

As the GCC becomes more capability-led, the human being becomes even more central to the value equation.

People are not simply occupants of the workplace. They are the productive capacity the GCC exists to enable.

That makes the physical conditions around them consequential.

> Research published in the Journal of Corporate Real Estate in 2025, based on more than 2,000 employees across the UK, France, Germany and Italy, found a relationship between office type, employer brand and employees' intention to leave, with employer brand acting as an important mediator.[23] Another 2026 study of 937 German office workers found meaningful differences between employee groups in their workplace and corporate real estate needs.[28]

The lesson is not that one workplace model produces one universal outcome. The evidence points in the opposite direction: people experience workplaces differently, and the organisation needs to understand those differences rather than design around an abstract average employee.

That pushes design beyond visual appeal.

Light, acoustics, thermal comfort, ergonomics, materiality, spatial density, movement and access to different work settings become part of a performance conversation. A quiet environment matters when the work requires concentration. A social setting matters when connection and exchange are the objective. A flexible environment matters when the pattern of work is uncertain.



CHAPTER 03 / PEOPLE AND PERFORMANCE

Start with the conditions for good work

Leesman's workplace data reinforces the importance of the physical basics. Satisfaction with noise levels remained low in its recent workplace studies, at 35% in 2023, 33% in 2024 and 36% in early 2025.[29] The persistence of that problem is instructive. The future workplace does not become intelligent by accumulating features while failing to solve fundamental conditions for effective work.

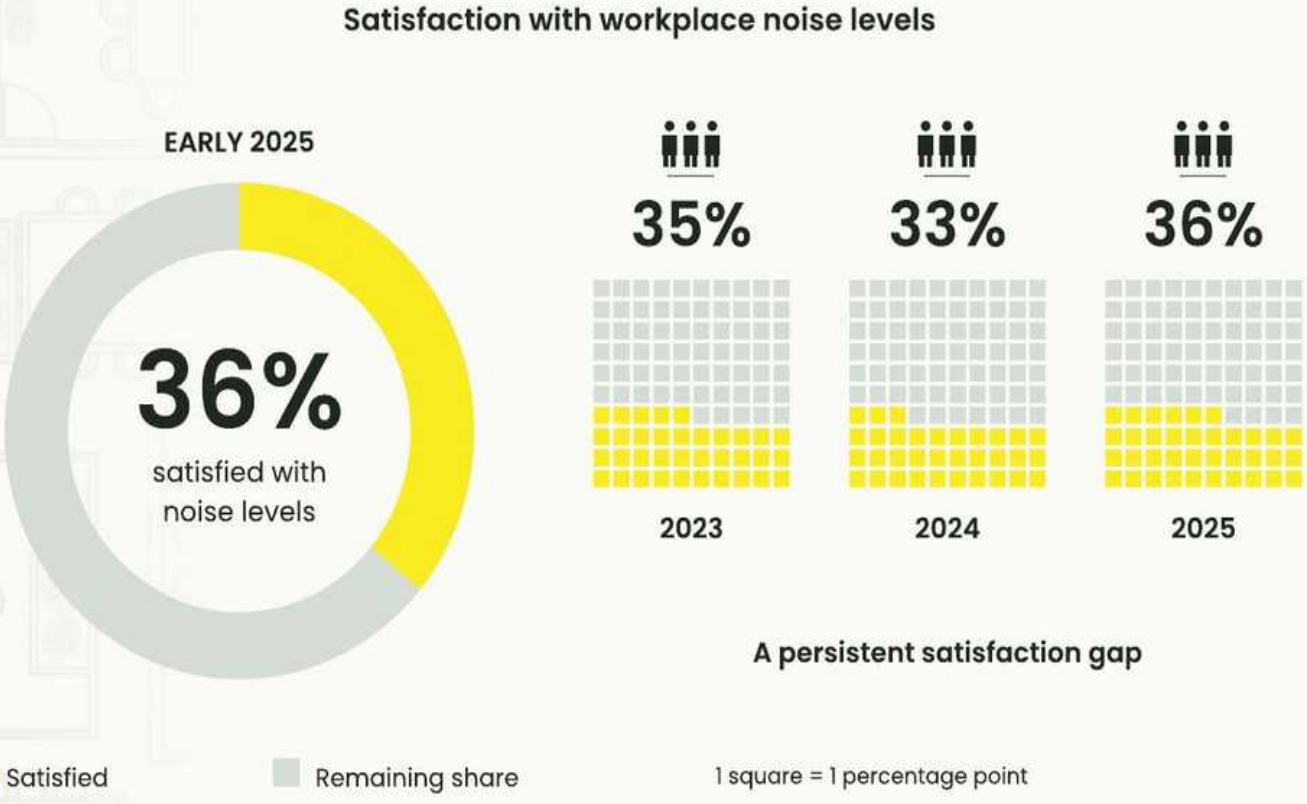


Figure 4 · Satisfaction with noise levels in the workplace. Source: Leesman;[29] the 2025 figure is Leesman's early indication.

The question therefore moves from 'How does the space look?' to something more demanding: 'How does the space help people perform the work the organisation needs from them?'

That is where workplace design begins to become human performance infrastructure.

CHAPTER

Disruption in the scale monotony

04

Global standards need local intelligence. The strongest GCC environments carry a consistent organisational DNA while responding to the culture, climate, talent and business realities of each market.



From global consistency to local intelligence

The more distributed the enterprise becomes, the more important this question of local intelligence becomes.

A global organisation should be recognisable wherever it operates. But recognisable does not have to mean replicated.

A workplace in Bengaluru, Manila, Warsaw, Dubai or São Paulo may belong to the same enterprise and carry the same brand principles, security standards and technology requirements, yet the experience of working in those places is shaped by different climates, cultures, labour markets, real estate conditions, regulations and patterns of work.

CHAPTER 04 / GLOBAL DNA / LOCAL INTELLIGENCE

Consistent identity. local intelligence.

This is why the old argument between standardisation and customisation is increasingly unhelpful.

The more useful distinction is between what should be standardised and what should remain responsive.

The strongest GCC design frameworks preserve a consistent enterprise identity while allowing each workplace to respond to its local culture, context and operational needs.

The same is true of workplace standards. The challenge is not simply to create a global template, but to create a system capable of expressing common organisational DNA in different physical contexts. Research into multinational workplace management has long shown that national and cultural contexts influence how workplace strategies are experienced and managed.[30]

More recent evidence on employee groups reinforces the point that workplace needs are not homogeneous even within a single market.[28]

That makes localisation a strategic design decision, not a decorative layer added at the end.

The opportunity is to create spaces that feel unmistakably part of one global organisation while still feeling as though they belong exactly where they are.

Scale, in this context, should not mean making every space the same.

It should mean making intelligent, contextual spaces possible at scale.



CHAPTER 04 / GLOBAL DNA / LOCAL INTELLIGENCE

What travels and what adapts

Transportables	Adaptables
Brand principles and identity system	Climate response: shading, ventilation, comfort
Security, data protection and access standards	Local materials, makers, craft and art
Technology, network and AV standards	Social and cultural spaces
Sustainability specifications and carbon targets	Work patterns: time zones, night shifts, commute
Health, safety and accessibility baseline	Local codes and green-building certifications
Space typologies and performance KPIs	Amenity mix shaped by local talent expectations



One multinational's workplace standards apply a 90/10 rule in small offices (90% standard, 10% local) and 70/30 in its flagships, because flagship sites engage more with clients and visiting employees.[31] A study of multinationals' workplace management in the Netherlands, Germany and the UK found that all of them adapted to local culture to some extent, but none had a strict central policy; the differences came mainly from involving local people in design.[30]

The share of local expression is therefore best decided deliberately, and it should rise with the node's role in the network.

Figure 5 · What travels and what adapts across a GCC network. Framework: Flipspaces; ratios: EUA.[31]

CHAPTER 04 / GLOBAL DNA / LOCAL INTELLIGENCE

A capital story that extends beyond India

India provides one of the clearest demonstrations of the GCC transition, but the underlying movement is global.

The Philippines continues to attract technology and business-services investment, while Central and Eastern Europe have developed deep pools of specialised engineering, technology and business talent. Countries across Latin America are also becoming part of the conversation as enterprises diversify their capability footprints.

These geographies are not necessarily competing for a single version of the same GCC. They can become complementary nodes in a distributed enterprise, each contributing different talent pools, time zones, market access, technical capabilities, and operating advantages.

This is where the capital narrative becomes more important than a simple ranking of locations.

The enterprise is effectively building a network.

Capital flows into the network. Capability develops within individual nodes. Knowledge moves between them. Leadership becomes distributed. The physical environments supporting those nodes become the places where that distributed enterprise becomes tangible.

The implication is profound for the built environment.

An office is no longer an isolated real estate decision. It is one physical node within a much larger enterprise architecture.

The quality of that node affects how people experience the organisation, how teams collaborate, how the brand is expressed, and how easily the organisation can grow into its next mandate.

That is why the rise of GCCs should be understood not simply as a real estate opportunity, but as a transformation in how global enterprises allocate and compound capability.



CHAPTER 04 / GLOBAL DNA / LOCAL INTELLIGENCE

The network beyond India

Everest Group counts more than 6,350 GCCs across offshore and nearshore locations worldwide, with new setups growing about 7% a year.[32]

United States (headquarters)

70% of India GCC demand, 2018 to 2025, came from US firms[8]

Poland and Central Europe

2,179 business services centres, about 500,000 people[33]



One enterprise network

Mexico and Latin America

Among the GCC maturity leaders[3]
A top 3 GBS location[34]

Philippines

1.89 million IT-BPM FTEs[35]
About 200 GCCs[36]

India

2,117 GCCs, 2.36 million professionals
FY26[1]

The same shift from cost to capability shows up in the buildings. In Manila, Leechiu Property Consultants reports that GCCs "invest more in their fit-outs and hire for higher-value, more specialized roles. They are not chasing the lowest cost per seat. They are building long-term capability hubs." In H1 2026, the GCC office pipeline in the Philippines overtook third-party BPO for the first time.[37]

Figure 6 · One enterprise network, one figure per node. Sources: United States: JLL;[8] Poland: ABSL;[33] Mexico: BCG,[3] Deloitte;[34] Philippines: IBPAP,[35] GMA News;[36] India: Zinnov-Nasscom.[1]

CHAPTER 04 / GLOBAL DNA / LOCAL INTELLIGENCE

What could slow this down

The GCC transition is real, but it is neither complete nor guaranteed. Four signals belong alongside the growth story.

01

Most GCCs are not there yet. Only 8% of GCCs have advanced significantly on innovation, differentiation, and efficiency together,[3] and only 5% of India's GCCs operate as Transformation Hubs.[1]

02

AI cuts both ways. The Observer Research Foundation models 40,000 to 150,000 GCC jobs in India displaced by AI between 2024 and 2030.[38] In the Philippines, IBPAP cut its 2028 industry targets in July 2026, citing AI.[36]

03

The market data disagrees with itself. For the same quarter, Q2 2026, CBRE recorded record India office leasing of 24.6 million sq ft,[10] while JLL reported a nine-quarter low of 16.45 million sq ft.[9]

04

AI's effect on space is still unclear. 56% of Asia Pacific occupiers see no effect of AI on their space needs yet, or say it is too soon to tell.[39]

None of this weakens the case for capability-led workplaces. It strengthens the case for workplaces that can adapt, because the path from Outpost to Transformation Hub is uncertain and uneven.

CHAPTER

From smart spaces to smarter systems

05

Technology is changing how spaces are imagined, built and adapted. When design, cost, procurement, feasibility and execution become connected, intelligence moves from the workplace itself into the process that creates it.



From technology-enabled to technology-capable

Technology is now changing not only what happens inside the GCC, but the conditions under which its workplace is conceived.

AI is becoming part of the enterprise itself. It is changing the nature of knowledge work, accelerating product development and reshaping how teams interact with information. It follows that the workplace cannot simply be a static environment in which new technology happens to be installed.

CHAPTER 05 / CONNECTED INTELLIGENCE

AI activity is not yet AI outcomes

CBRE's 2026 occupier research found that 93% of respondents were at some stage of AI implementation. Yet the same research indicates that the leasing implications are not straightforward, with 57% reporting no material impact on their leasing strategy.[2] That tension is important. AI adoption does not automatically translate into a particular office footprint. It changes what the organisation may need from its space, infrastructure and people.

JLL's 2025 Global Real Estate Technology Survey presents a similar paradox at the enterprise level. More than nine in ten occupiers surveyed were running AI pilots in corporate real estate, but only 5% said those pilots had achieved their goals.[4] The lesson is not that AI lacks value. It is that technology without integration, data discipline, and a clear operational purpose does not automatically produce better outcomes.

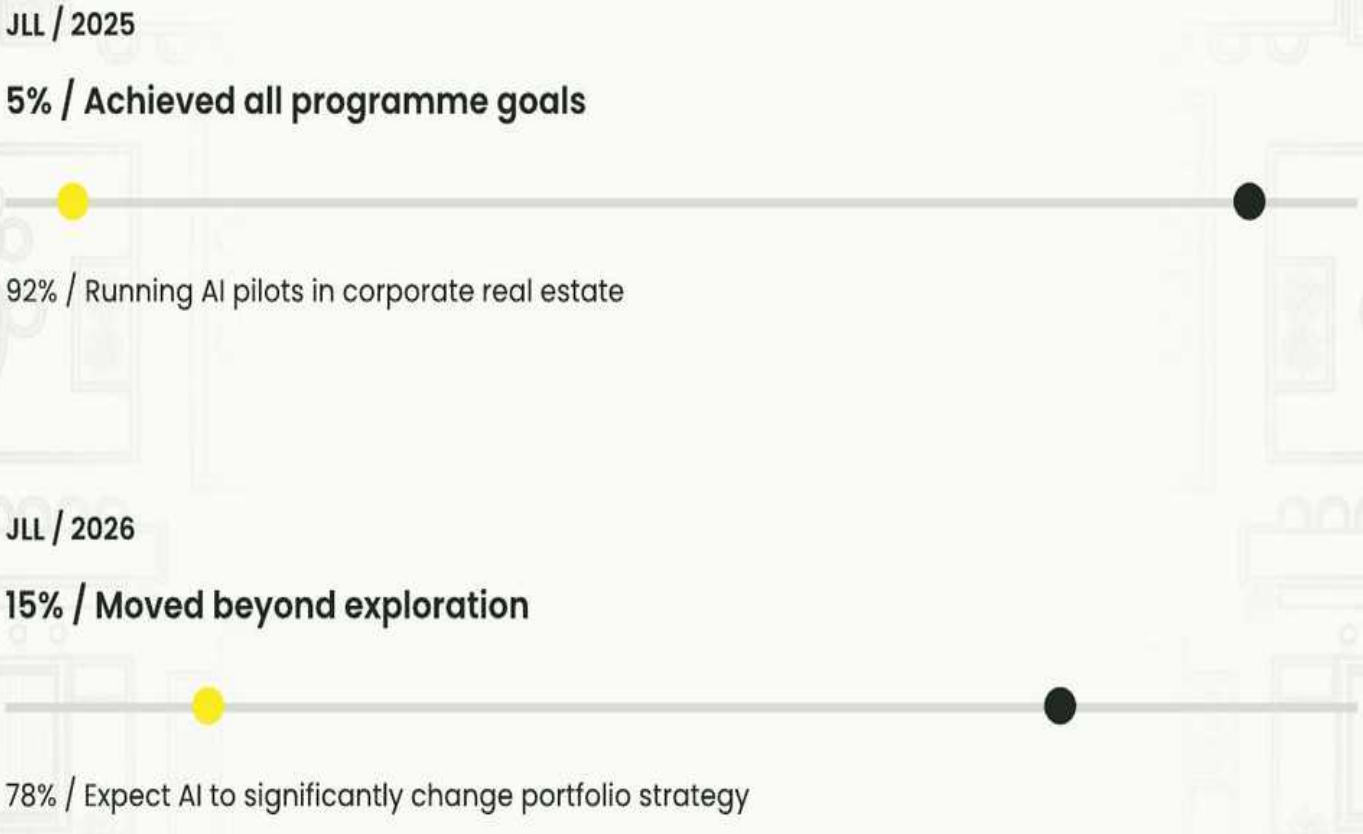


Figure 7 · AI activity versus AI outcomes in corporate real estate. Sources: JLL 2025 survey,[4] JLL 2026 survey.[40]

CHAPTER 05 / CONNECTED INTELLIGENCE

Intelligence in the decision-making system

The same principle applies to design and build.

A workplace can contain screens, sensors, booking systems, and smart infrastructure while the process that created it remains fragmented. The more important opportunity is to make technology part of the decision-making system itself.

Can a design be evaluated against cost before it reaches the site? Can procurement availability inform design rather than disrupt it later? Can project documentation become accessible across the delivery team? Can site information be captured without disappearing into disconnected conversations? Can future users experience the proposed environment before it physically exists?



This is the difference between a technology-enabled workplace and a technology-capable design and build ecosystem.

Intelligence should not be measured by how much technology is visible.

It should be measured by how much better the system can understand, decide, adapt, and execute.

CHAPTER

The most sustainable space may be the one that can change

06

Longevity is becoming a design strategy. Adaptable environments can extend the life of infrastructure, reduce repeated interventions and create greater value across the workplace lifecycle.



Sustainability moves from certification to lifecycle value

The same shift is taking place in sustainability.

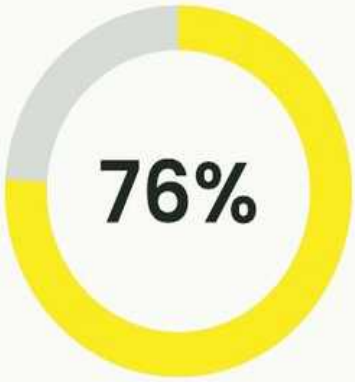
For years, the conversation around green buildings could be organised around certification, energy efficiency and performance at completion. Those remain important. But as organisations occupy spaces for longer and refresh them more frequently, the environmental question extends beyond the building itself.

CHAPTER 06 / LIFECYCLE VALUE

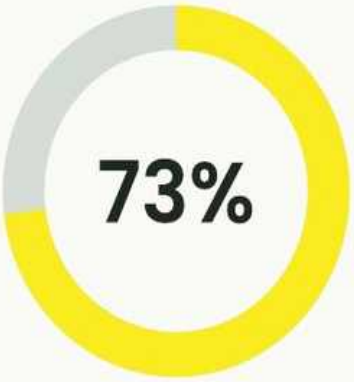
Sustainability beyond handover

In India, 76% of new office completions in Q2 2026 were green-certified, while 73% of leasing activity was concentrated in green-certified buildings.[10] Sustainability is clearly moving from differentiation towards a baseline expectation in the market.

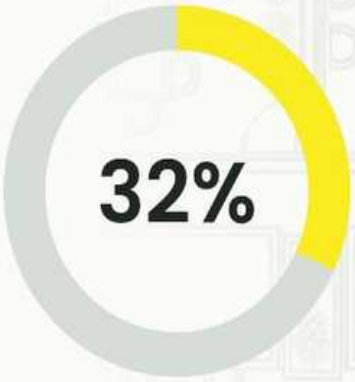
But certification at handover is only the beginning of the lifecycle.



New office completions green-certified Q2 2026[10]



Leasing in green-certified buildings[10]



Building lifecycle carbon from fit-outs[41]

The Green Building Council of Australia estimates that fit-outs can account for around 32% of a building's lifecycle carbon, while interiors may be replaced every five to seven years.[41] JLL's APAC research has also highlighted how recurring fit-outs can accumulate emissions over time, with repeated workplace interventions potentially producing several times the emissions associated with the base building itself.[5]

Figure 8 - Fit-outs as a share of an office building's lifecycle emissions. Source: Green Building Council of Australia.[41]



CHAPTER 06 / LIFECYCLE VALUE

That changes the sustainability question.

It is no longer enough to ask whether the next workplace is greener than the previous one. We have to ask how often it will need to be rebuilt, how much of its infrastructure can be retained, whether materials can be reused, whether layouts can evolve, and whether the asset can continue to support a changing organisation without generating a new cycle of demolition and construction.

The most sustainable workplace may therefore not simply be the one that consumes less today.

It may be the one that remains useful for longer.

That is particularly relevant to GCCs because the underlying enterprise mandate is changing so quickly. A workplace designed for a single moment can become environmentally and economically inefficient if the organisation outgrows it or changes direction soon after completion.

Adaptability becomes sustainability.

And sustainability becomes a question of lifecycle value.



CHAPTER

The future workplace will be responsive

07

Not finished once it is handed over, but capable of learning and evolving. The shift is from a linear project to a connected cycle of understanding, imagining, validating, building, learning and adapting.



The responsive workplace

These shifts converge on a larger transformation: the workplace is becoming a responsive environment.

Its architecture, interiors, technology and infrastructure cannot operate as separate layers. Its design has to anticipate change rather than simply document today's requirements. Its construction has to be informed by operational realities. Its performance has to be considered beyond the moment of handover.

CHAPTER 07 / RESPONSIVE ENVIRONMENTS

From a linear project to a connected cycle

Traditionally, the process has been linear:

Brief → design → procure → build → handover.

That sequence assumes that each stage can make decisions with relatively limited knowledge of what follows.

The future demands something more connected:



Figure 9 · Linear delivery versus the connected cycle described in this paper.

This is not simply a new workflow. It is a different philosophy of building.

The difference becomes particularly important when capital is being deployed into a workplace that is expected to evolve. Every decision made earlier in the process can influence what remains possible later.

A design choice affects cost. Cost affects procurement. Procurement affects availability and lead time. Lead time affects the programme. The programme affects execution. Site conditions can force changes. User behaviour can reveal new requirements. The organisation itself can change before the workplace has reached the end of its useful life.

The design and build process therefore has to become capable of learning.

That is what makes responsiveness more than flexibility.

Flexibility is a characteristic of a space.

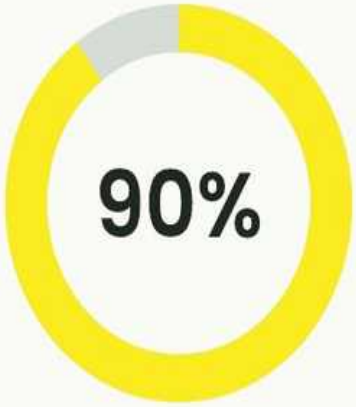
Responsiveness is a characteristic of the system that creates and manages that space.

CHAPTER 07 / RESPONSIVE ENVIRONMENTS

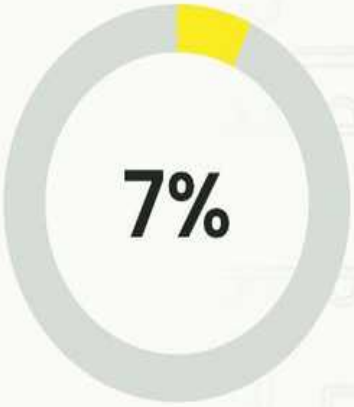
Measuring what the space makes possible

A responsive workplace needs a way to learn, and measurement after handover is still the exception. A review of 146 post-occupancy evaluation projects concluded that post-occupancy evaluation "has not become a norm in the building industry".[42]

The data to learn from is increasingly there. Utilisation data now informs 90% of workplace planning decisions, yet only 7% of organisations rate their data capabilities as excellent.[27] A simple scorecard, agreed at the brief and measured after move-in, closes that loop.



Workplace planning decisions informed by utilisation data[27]



Organisations rating data capabilities excellent[27]



CHAPTER 07 / RESPONSIVE ENVIRONMENTS

The workplace performance scorecard

Utilisation

KPI

Average and peak utilisation against target

HOW TO MEASURE

Badge or sensor data

WHEN

Quarterly

PUBLISHED REFERENCE POINT

56% global average against a 74% target[27]

Experience

KPI

Employee experience score; noise and focus satisfaction

HOW TO MEASURE

Post-occupancy survey

WHEN

6 and 12 months after move-in

PUBLISHED REFERENCE POINT

35% satisfied with noise across Leesman's benchmark[29]

Talent

KPI

Attrition, offer acceptance, candidate site-visit conversion

HOW TO MEASURE

HR data

WHEN

Annually

PUBLISHED REFERENCE POINT

GCC attrition of 9% in 2025[7]

Performance enablement

KPI

Share of staff with access to three or more setting types; focus-room availability

HOW TO MEASURE

Space audit and booking data

WHEN

At handover, then annually

PUBLISHED REFERENCE POINT

Access to 3+ setting types linked to 14% higher engagement[43]

CHAPTER 07 / RESPONSIVE ENVIRONMENTS

The scorecard beyond handover

Delivery

KPI

Design-to-execution cost variance; change orders; brief-to-first-seat time

WHEN

Per project

HOW TO MEASURE

Project records

Adaptability

KPI

Time and cost to reconfigure a zone; share of demountable or reusable components

WHEN

Per change

HOW TO MEASURE

Project and facilities records

Sustainability

KPI

Fit-out embodied carbon per sq. m.; reused content; waste diverted; energy intensity

WHEN

Per project, then annually

PUBLISHED REFERENCE POINT

Office interiors average about 190 kg CO2 per sq. m. per fit-out[44]

HOW TO MEASURE

Lifecycle assessment and site records

Brand

KPI

Employee and visitor perception of brand expression; employer-brand score

WHEN

Annually

PUBLISHED REFERENCE POINT

65% of occupiers rank brand and culture-led design first[2]

HOW TO MEASURE

Survey

Table 4 · Workplace performance scorecard. Framework: Flipspaces; reference points as numbered.

CHAPTER 07 / RESPONSIVE ENVIRONMENTS

Design intelligence: from render to reality

The next evolution of GCC design will therefore be shaped by the ability to make better decisions before those decisions become expensive physical realities.

A design option is only valuable if it can survive the realities of cost, procurement, availability, timelines, structural conditions, and site execution.

01 A beautiful render that cannot be sourced is not a solution.

02 A sustainable material that cannot be procured at scale is not a solution.

03 A flexible workplace that cannot be operationally managed is not a solution.

04 A technology-enabled space that does not improve the experience of the people using it is not a solution.

This is where the convergence of design, technology and execution becomes critical.



CHAPTER 07 / RESPONSIVE ENVIRONMENTS

Connecting the decisions

The construction and architecture ecosystem is beginning to recognise the scale of this opportunity. McKinsey's 2026 analysis estimates that AI-enabled transformation across the US architecture, engineering and construction ecosystem could create up to $228 billion in annual value by 2030.[45] The number is less important as a prediction than as an indication of the scale at which the industry is beginning to think about AI: not as an accessory to design, but as a potential transformation of how work gets done.

The opportunity for GCC environments is especially significant because the brief itself is becoming more complex.

A future-ready workplace may need to reconcile cost, experience, sustainability, technology, procurement, and adaptability within the same decision. That cannot be handled efficiently when each dimension exists in a separate workflow.

The future will belong to design and build ecosystems that can understand these interdependencies early, test possibilities faster, and carry design intent all the way through to execution.

The intelligence of the workplace increasingly depends on the intelligence of the process used to create it.

UP TO

$228Bn

annual value by 2030[45]

AI-enabled transformation

01 Architecture

02 Engineering

03 Construction

US ecosystem · McKinsey 2026 estimate[45]



CHAPTER 07 / RESPONSIVE ENVIRONMENTS

Evidence: why decisions made early matter

Construction has been slow to improve. McKinsey finds construction productivity grew 0.4% a year between 2000 and 2022, against 3.0% in manufacturing.[45] AI on the delivery side is still early: in RICS's 2025 survey of more than 2,200 construction professionals, 45% reported no AI implementation and under 1% had AI fully embedded, though design optioneering was the most expected use over the next five years (40%).[46]

The cost of late discovery is concrete. In a comparative case study from Stanford's Center for Integrated Facility Engineering, operability issues that were not identified early in one building led to field rework, requests for information, and change orders totalling at least USD 100,000.[47] Integrated delivery is gaining ground for the same reason: design-build is projected to account for over 47% of US construction spending by 2028.[48]

0.4%

Construction · annual growth, 2000–2022[45]

3%

Manufacturing · annual growth, 2000–2022[45]



CHAPTER 07 / RESPONSIVE ENVIRONMENTS

Building what comes next

This is where the role of **Flipspaces** sits within the larger evolution.

The opportunity is not simply to build larger GCC offices. It is not simply to create more experiential workplaces or introduce more technology.

It is to rethink how spaces are conceived, designed, sourced and built when the organisation they serve is itself changing.

The requirement of GCCs is to:

Visualise: Help stakeholders experience and assess a proposed space before it is built.

Validate: Test design decisions against project constraints, budgets and available information.

Connect: Align design, product sourcing, documentation and execution within one integrated system.

Execute: Translate the intended design into a deliverable physical environment, with visibility across costs, timelines and progress.

Adapt: Enable responses to evolving business needs, where commercially and technically feasible, through connected project information and AI-enabled insights.

CHAPTER 07 / RESPONSIVE ENVIRONMENTS

Carrying intent through reality

These capabilities matter because the challenge is no longer simply producing a design.

The challenge is carrying intent through the realities that follow.

Where design is connected to availability.

Where imagination is connected to feasibility.

Where decisions are connected to their downstream consequences.

Where information remains connected rather than becoming fragmented across files, conversations and stages.

And where the physical environment can be created with a clearer understanding of the people, technology and business it is ultimately meant to serve.

That is the direction in which design and build has to move if the workplace is becoming an enterprise asset rather than simply an office.



CHAPTER 07 / RESPONSIVE ENVIRONMENTS

The shift, seen in practice

Evidence: what our GCC projects show

The ideas shaping the next generation of GCCs are already taking physical form.

Case study: logistics, shipping and supply chain solutions



Project photography · Flipspaces

Flipspaces designed and built a workplace for the logistics, shipping and supply chain solutions industry, shaped around the pace, precision and interconnectedness of modern logistics. From focused work zones and collaborative settings to spaces that support movement, communication and quick decision-making, every element was designed to help people and processes move with greater ease.

It reflects a central shift explored in this paper: from static workplaces to spaces built for organisational velocity, where design becomes an enabler of speed, connectivity and performance.

CHAPTER 07 / RESPONSIVE ENVIRONMENTS

Case study: business process management (BPM) and outsourcing



Project photography · Flipspaces

Flipspaces designed and built a workplace for the Business Process Management (BPM) and outsourcing industry, with a clear distinction between focused work and spaces for interaction, recreation and social connection. The contrast between structured work areas and more expressive social zones creates an environment that responds to different ways of working.

It brings the idea of human performance into the physical environment, designing not just for where work happens, but for the different conditions people need to focus, collaborate, recharge and connect.

From Workplace to Organisational Expression

Together, these spaces demonstrate a broader shift in GCC design. The workplace is no longer simply infrastructure that accommodates an organisation. It is becoming an environment that expresses how the organisation works, what it values and what it enables.

CHAPTER 07 / RESPONSIVE ENVIRONMENTS

The RESPONSIVE SPACE model

The two workplaces demonstrate what this shift looks like once it is built. The harder question for an enterprise planning its next node is how to arrive at that outcome deliberately, and how to keep the space fit for purpose long after handover.

To bring the arguments of this paper together, Flipspaces proposes the RESPONSIVE SPACE model: a decision framework for designing, building and evolving GCC environments. It is a Flipspaces synthesis rather than an established industry standard, and it follows one progression:

Global ambition

Local intelligence

Lifecycle evidence

Responsive design and build.

RESPONSIVE

A framework for decisions across the workplace lifecycle

CHAPTER 07 / RESPONSIVE ENVIRONMENTS

The RESPONSIVE SPACE model

R Requirements

Define business capability, work modes, security, accessibility and performance requirements.

E Enterprise DNA

Identify the global brand, culture and standards that must remain consistent.

S Site intelligence

Adapt to climate, local regulations, culture, supply chains and operating patterns.

P Performance

Translate the brief into measurable human, operational and environmental outcomes.

O Options

Compare, retain, reconfigure, refurbish and replace scenarios before committing.

N Numbers

Quantify cost, carbon, energy, waste and lifecycle implications with transparent assumptions.

S Systems integration

Connect design, materials, procurement, technology and execution.

I In-use learning

Measure actual occupancy, energy, user experience and post-occupancy performance.

V Value over time

Evaluate durability, maintenance, future change and lifecycle cost.

E Evolution

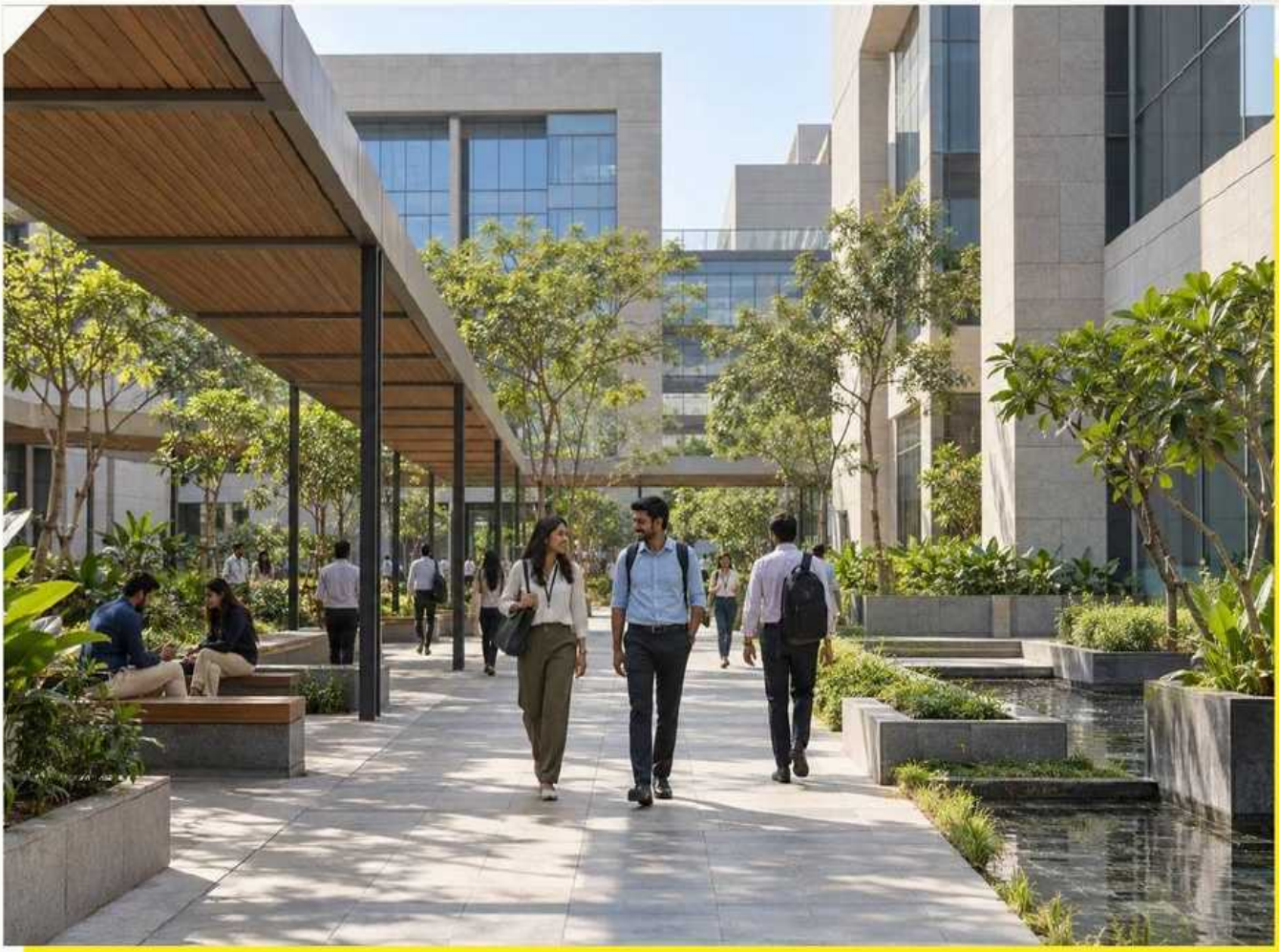
Use evidence to inform future reconfiguration, upgrades and investment decisions.

Table 5 · The RESPONSIVE SPACE model. Framework: Flipspaces. The lifecycle measurement elements are consistent with the principles of the RICS whole-life carbon assessment methodology.

CHAPTER 07 / RESPONSIVE ENVIRONMENTS

Globally coherent. locally intelligent.

The output is a workplace that is globally coherent, locally intelligent and demonstrably fit for purpose over time. The model gathers the threads of this paper into three working pairs:



01 Enterprise DNA and Site Intelligence resolve the tension between global consistency and local intelligence described in Section 04.

02 Options, Numbers and Value over Time separate sustainability intentions from measured lifecycle benefits, the shift described in Section 06.

03 In-use Learning and Evolution create a feedback loop, so that handover becomes a point in the cycle rather than the end of the process, as Section 07 argues.

CHAPTER 07 / RESPONSIVE ENVIRONMENTS

Logistics, shipping and supply chain solutions: designing for organisational velocity

The brief began with the nature of the work. Modern logistics runs on pace, precision and interconnectedness, and those qualities became the requirements of the space. Instead of a uniform floorplate, the workplace was planned around distinct work modes: focused work zones for concentration, collaborative settings for coordination, and spaces that support movement, communication and quick decision-making. That is the first move of the model, Requirements, defined by business capability rather than by headcount alone.

It is also an expression of Enterprise DNA. The operating character of the organisation, the speed and connectedness that define how it works, is carried into the physical environment, so the space reads as part of the enterprise rather than as generic office accommodation.

The intended outcome, keeping people and processes moving with greater ease, is a Performance aim before it is an aesthetic one. It turns an operating characteristic into a spatial one, and it can be tested. Under the model, the next layer of evidence is In-use Learning: how the movement, collaboration and decision-making settings are actually used, measured against the scorecard in Table 4. That evidence then informs Evolution, so that the workplace can keep pace as the operation it supports changes.



Project photography · Flipspaces

CHAPTER 07 / RESPONSIVE ENVIRONMENTS

Business process management (BPM) and outsourcing: designing for the range of human performance

Here, the defining design decision was a clear distinction between focused work and spaces for interaction, recreation and social connection. Structured work areas sit alongside more expressive social zones, and the contrast between them gives people a choice of conditions rather than a single way of working. In the language of the model, this is Requirements expressed as work modes: the brief recognises that people need different environments to focus, collaborate, recharge and connect.

The same decision speaks to Performance. The space is designed around human outcomes, not only around where work happens, which is the shift from workplace design to human performance described in Section 03.

A clearly zoned workplace also creates a structure that can be reviewed. As the balance between focused and social work changes, the model asks the project to compare Options before rebuilding: whether a zone should be retained, reconfigured, refurbished or replaced. Evaluated with transparent Numbers and over the full Value over Time, that comparison is how the space can continue to respond to the people it serves without starting a new cycle of fit-out.



Project photography · Flipspaces

CHAPTER 07 / RESPONSIVE ENVIRONMENTS

What the projects add up to

Taken together, the two workplaces show the first stage of the progression clearly. Each began with global ambition translated into requirements, enterprise character and performance aims. The later stages of the model, local intelligence, lifecycle evidence and responsive design and build, are where the brief extends beyond the day the space opens: into how it is measured, how it performs and how it evolves. That is the standard the model sets for the next generation of GCC environments.

1. Global consistency and local intelligence

- ☐ Global brand principles and design standards are documented.
- ☐ Security, accessibility and applicable compliance requirements are mapped.
- ☐ Local climate, culture, workforce needs and regulations are assessed.
- ☐ Spatial planning is supported by work-mode and occupancy evidence.
- ☐ Material selections are evaluated for availability, durability and maintenance.



CHAPTER 07 / RESPONSIVE ENVIRONMENTS

From principles to project checks

2. Lifecycle value and environmental performance

- ☐ The assessment boundary and study period are agreed.
- ☐ Retain, reconfigure, refurbish and replace scenarios are compared where relevant.
- ☐ Embodied carbon and operational energy are assessed separately.
- ☐ Maintenance, replacements, waste and end-of-life impacts are included.
- ☐ Environmental claims are supported by calculations and documented assumptions.

3. Delivery and future responsiveness

- ☐ Design intent is checked against budget, sourcing and execution constraints.
- ☐ Material and system choices are assessed for future repair or reconfiguration.
- ☐ Success measures and a baseline are agreed before occupation.
- ☐ Post-occupancy energy, space use and user feedback will be reviewed.
- ☐ There is a documented process for learning and adapting after handover.



CHAPTER

Capital. capability. place.

08

The three are becoming one enterprise story. Capital creates the opportunity. Capability creates value. Place creates the environment in which that value can compound.



The future will not be one-size-fits-all

The most important shift in the future of GCC spaces may therefore be philosophical.

For a long time, scale meant replication. The same model could be repeated across markets, floors and teams because consistency was considered the ultimate measure of efficiency.

But the organisations shaping the future are increasingly asking their spaces to do something different.

CHAPTER 08 / CAPITAL / CAPABILITY / PLACE

A different definition of scale

To support different kinds of work.

To attract different kinds of talent.

To reflect different cultures.

To adapt to changing technologies.

To respond to changing business needs.

To perform against increasingly ambitious sustainability goals.

That requires a different definition of scale.

Scale should not mean making every space the same.

It should mean making intelligent, contextual spaces possible at scale.

This is also why the future GCC should not be understood as a collection of offices. It is better understood as a living network of enterprise capability, with each physical node expressing the organisation's identity while responding intelligently to its own context.

The workplace becomes part of the network.

The network becomes part of the enterprise.

And capital, capability and place become connected parts of the same story.



CHAPTER 08 / CAPITAL / CAPABILITY / PLACE

What should a GCC space make possible?

When an enterprise decides to build capability in a new geography, it is making a long-term commitment.

Capital is being deployed. People are being hired. Technology is being installed. Intellectual property is being created. Leadership is being established. Relationships are being built. An organisational presence is taking shape.

The space is part of that commitment.

That is why the future of GCC design cannot be reduced to the next office trend. It is a question of how physical environments can help enterprises get more value from the capability they are building.

The most useful question is therefore not:

What should this space look like?

It is not even: How many people should this space accommodate?

It is: What should this space make possible?

A new capability. A new product. A new market. A new generation of talent. A new way of working. A new node in a global enterprise.

The answer will be different for every organisation and every geography. That is precisely the point.

The future will not be built through one universal workplace template. It will be built through systems that can understand context, connect decisions and translate enterprise ambition into environments capable of evolving with it.



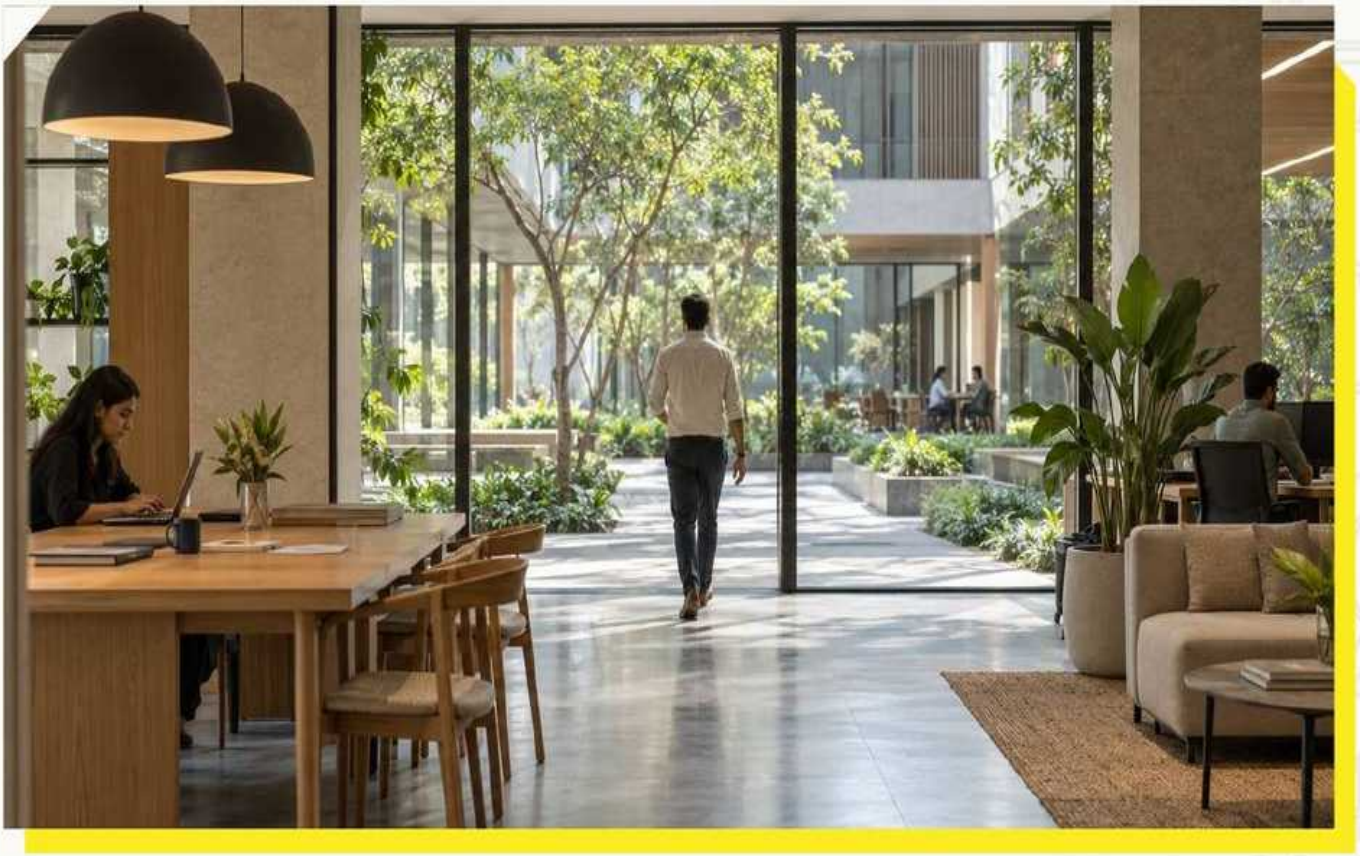
CHAPTER 08 / CAPITAL / CAPABILITY / PLACE

Building what comes next

Capital creates the opportunity.

Capability creates value.

Place gives it the environment to compound.



The next generation of GCCs will therefore not be defined only by where global enterprises choose to work. They will be defined by where they choose to build what comes next, and by whether the spaces they create are capable of growing with that ambition.

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