NANO GCC REAL ESTATE · POINT OF VIEW

The Half-Empty Office

A nano GCC can report 50% utilisation and still run out of room every Tuesday. Why the monthly average misleads, and how a seven-measure dashboard turns workplace data into decisions made on time.

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AT A GLANCE

- A nano GCC (20 to 200 people) feels the busiest day, not the average one. Globally, offices averaged 53% utilisation in 2025 but peaked at 80%[1].
- GCCs took 42% of India's office leasing in Q3 2026[2]. New space is arriving, but the right floor still takes months to secure, so a capacity problem has to be seen two quarters early.
- Track seven measures, agree in advance which level triggers which action and who approves it, and measure spaces, not people.

01 The trap

A GCC in its first year has 32 people and 30 desks. The monthly facilities report shows utilisation at about 50%, and leadership reads it as room to grow. On Tuesday, the anchor day, rooms are booked the night before, engineers take calls in the pantry and a new joiner is told to find any free desk. By Friday, the floor is quiet. Eight more hires are due within two quarters.

Both pictures are true. The report shows the average; employees live the peak. A large centre absorbs the difference in slack space; a nano GCC cannot. The cause is rarely bad data. It is a report built to describe the office rather than to trigger a decision, with no threshold, owner or approval route attached to any number on it.

> *A workplace dashboard should be judged by the decisions it triggers, not by the charts it contains.*

02 Why the gap matters more in 2026

Hybrid work has settled into anchor days, and that concentrates demand. CBRE found that 96% of organisations now have targeted in-office policies, and that average building utilisation across its client portfolios rose to 53% in 2025, up from 38% in 2024, while average peak utilisation reached 80%[3]. JLL's benchmark puts global utilisation at 56% in 2026[4]. Meeting rooms are often the first constraint: in Gensler's 2026 survey, 43% of

[1] CBRE, "The Hybrid Reality: Why the Office Is More Important Than Ever" (2026 Global Workplace & Occupancy Insights, January 2026). Data covers CBRE client portfolios globally. www.cbre.com/insights/articles/the-hybrid-reality-why-the-office-is-more-important-than-ever

[2] Cushman & Wakefield, "India's office real estate sector growth in Q3 2026" (October 2026). www.cushmanwakefield.com/en/india/news/2026/10/india-office-market-growth-in-q3-2026

[3] CBRE, see note 1.

workers had cancelled meetings because no room was available, and 65% use meeting rooms for focus work because quiet space is scarce[5].

In India, the space question is tied to lead time. GCCs leased 9.1 million sq ft in Q3 2026, 42% of all leasing, according to Cushman & Wakefield. The same quarter brought a record 22.7 million sq ft of completions, and vacancy rose for the first time in twelve quarters, to 14.37%[6]. More supply means more choice, but only for a centre that knows its requirement early enough to act on it.

These are different series, mostly from large global portfolios, and should not be combined or treated as targets for an India nano GCC. Together, though, they point one way: a single utilisation figure now hides more than it shows.

03 Looking ahead: 2027 and beyond

- **Privacy rules take full effect.** Most of India's Digital Personal Data Protection Rules apply 18 months after their November 2025 notification, which brings duties on notice, security safeguards and breach reporting into force by mid-2027[7]. CBRE found that 71% of organisations with in-office requirements monitor attendance[8]. Dashboards built on named badge data will need a clear purpose and safeguards; aggregate counts avoid most of that exposure.
- **Flex becomes part of the capacity plan.** Colliers expects flex stock in the top seven cities to pass 100 million sq ft by 2027, about 10.5% of all office stock[9]. Flex seats are often a small centre's fastest response to a crossed threshold, so the dashboard should count them alongside the leased floor.
- **Choice rewards the early mover.** Record completions should give occupiers more options in 2027, but only the centre that sees its peak coming six months out can use them.

04 Seven measures, and no more

Small centres are tempted to copy the dashboards of large ones, which usually means twenty metrics and no decisions. Seven are enough, each with a written definition, a data source and an owner.

Measure	What it tells you	Typical source
Peak-day seat use	Seats used on the busiest day of the week, against seats available	Badge or Wi-Fi counts, desk booking
Average seat use	Overall efficiency of the space you pay for	Same as above
Meeting room pressure	Share of core hours booked on peak days, and requests turned away	Room booking system
Occupancy cost per FTE	Rent, fit-out amortisation and services divided by headcount	Finance

[4] JLL, Global Occupancy Planning Benchmark Report 2026 (May 2026); 84 organisations, 716 million sq ft. www.jll.com/en-us/insights/occupancy-benchmark-report

[5] Gensler, Global Workplace Survey 2026 (16,400+ office workers, 16 countries), as reported in "Gensler survey: employees resort to DIY fixes for office shortfalls" (Facility Executive, March 2026). facilityexecutive.com/gensler-survey-employees-resort-to-diy-fixes-for-office-shortfalls

[6] Cushman & Wakefield, see note 2.

[7] Ministry of Electronics and Information Technology, Digital Personal Data Protection Rules, 2025 (notified November 2025). Most substantive rules apply 18 months from publication. static.pib.gov.in/WriteReadData/specificdocs/documents/2025/nov/doc20251117695301.pdf

[8] CBRE, see note 1.

[9] Colliers, "Flex India: Pioneering the Future of Work", as reported in The Realty Today (December 2025). therealtytoday.com/news/market-insights/indias-flex-market-to-cross-100-msf-with-penetration-above-10-by-2027-says-colliers-india-report/

Measure	What it tells you	Typical source
Service incidents	Volume and type of workplace tickets: IT, power, access, housekeeping	Helpdesk
Service response	Time to resolve against the agreed level	Helpdesk, vendor reports
Employee feedback	A short quarterly pulse on whether the office supports the work	HR survey

Show each measure as a trend over at least three months, with the approved hiring forecast alongside.

Keep definitions stable, so a change in the number reflects the office rather than the counting. A nano GCC's office should be sized for where headcount is going, not where it is today.

05 What the average was hiding

Return to the opening scenario, assuming attendance grows in line with headcount.

EXHIBIT 1 · SAME OFFICE, FOUR VIEWS (ILLUSTRATIVE)

View	Headcount	Average seat use	Tuesday peak	Peak vs 30 desks
Today, as reported	32	15 (50%)	27	90%
Today, anchor days spread	32	15 (50%)	21	70%
After hiring, anchor days spread	40	19 (63%)	26	87%
After hiring, no change	40	19 (63%)	34	113%

Assumptions chosen for clarity, not benchmarks. Figures rounded. Vertara Global analysis.

The monthly report shows 50% today and 63% after hiring; neither suggests a problem. Spreading anchor days is the cheap first fix and brings Tuesday to 70%. Once the hires arrive, the peak climbs back to 87%, above the trigger. Left alone, the office is four desks short. Because a flex block, an expansion or a new site takes months to secure, the capacity conversation has to start now, while the average still says 50%.

06 How to run the dashboard

A dashboard without agreed triggers is just a monthly report. Before collecting any data, agree what level of each signal prompts which action, and who owns it. The thresholds below are starting points, not standards.

Signal	Illustrative trigger	Action	Owner
Peak-day seat use	Above 85% for four weeks running	Rebalance anchor days, review desk-sharing ratio	GCC head, HR
Peak forecast with hiring	Above 85% within six months	Open capacity options: flex block, expansion, new site	GCC head, Finance
Meeting room pressure	Requests regularly unmet on peak days	Reconfigure, add bookable huddle space	Facilities
Cost per FTE	Above budget for two quarters	Review footprint, services and contracts	Finance
Service response	Repeated misses against agreed levels	Vendor review, escalate to headquarters	Facilities, IT
Employee feedback	Decline in two consecutive pulses	Focus groups, targeted fixes	HR

Thresholds are illustrative. Each centre should set its own, with headquarters approval where spend is involved.

- **Name the approval route.** The decision to take more space often sits with real estate or finance at headquarters, several time zones away. Agreed in advance, it turns a red number into a decision in weeks, not quarters.
- **Set triggers to your own lead times.** Escalate when forecast peak plus the time to deliver new capacity approaches the desks you have. A tight micro-market needs an earlier trigger than one with flex space next door.
- **Review together, quarterly, and log decisions.** Put the GCC head, HR, finance, IT, facilities and the business in one room: low utilisation can look like waste to finance and a culture issue to HR. Record each action and why; the log shows headquarters the centre manages capacity deliberately.
- **Measure spaces, not people.** Aggregate counts by floor, zone and day answer every question here. Tracking named individuals adds nothing and costs trust.

QUESTIONS FOR THE BOARD

1. Do we see our peak day, or only our monthly average?
2. Is the approved hiring forecast shown next to our capacity figures?
3. When a threshold is crossed, who approves action, and how long does that take?
4. Is our workplace data aggregated and ready for the privacy rules that apply from 2027?

07 How Vertara Global helps

We build the workplace dashboard into a GCC's launch, while measures and decision rights are still cheap to agree. We define each measure with its source and owner, set thresholds against the centre's own expansion lead times, agree the approval route with headquarters and design privacy-conscious data collection from day one. The deliverable is a one-page dashboard and a decision charter.

Whichever operating model the client chooses, including build–operate–transfer, we can run the quarterly reviews and hand over definitions, data sources and open actions to the client's owners, staying engaged into year two. The test of success: no capacity surprise, and every workplace decision made before it became urgent.

ABOUT VERTARA global

Vertara Global is a practitioner-led GCC advisory firm. We help mid-market companies across sectors and geographies design, set up, scale and transform their Global Capability Centres, from the first business case and location choice to the operating model, entity, talent and workplace.

Our services span five pillars:

1. **GCC Consulting**
2. **Legal & Entity Support**
3. **People Advisory**
4. **Digital & AI**
5. **Engineering GCC Solutions**

Client-first and leader-led: senior practitioners run every engagement, and we stay involved after handover, because year two is where many GCCs are tested.