



# Global Corporate Services Overview

**Bill Concannon**

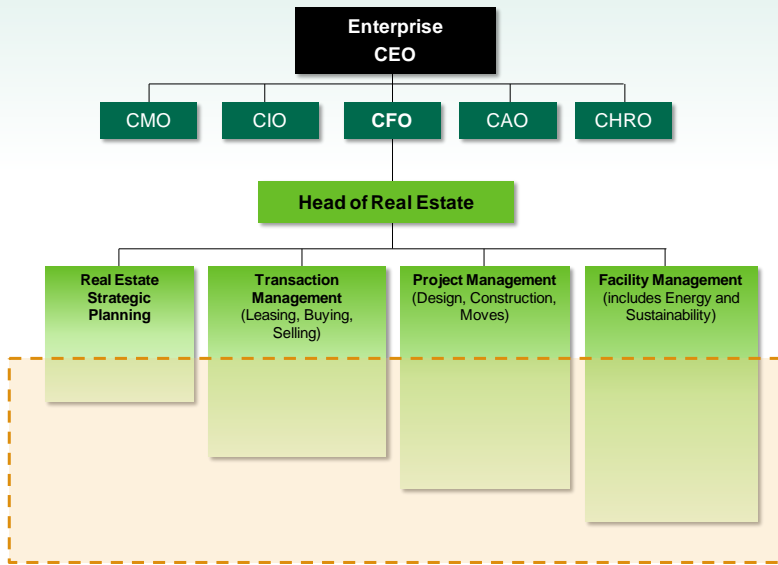
CEO

Global Corporate Services (GCS)

December 6, 2012

# GCS Is an Outsourcing Contracts Business

## Typical Real Estate Outsourcing Functions Transitioned to CBRE



## Key Facts

- 300+ clients under contract
- 70% of strategic accounts are multi-service
- Approximately 12,000 global GCS associates
- 179 contracts signed through Q3 2012 (more than all of 2011)
- Clients served in 120+ countries
- 3-5+ year contract terms provide annuity revenue
- 100% renewal rate of strategic accounts through Q3 2012

## Diverse, Global, and Growing Client Base

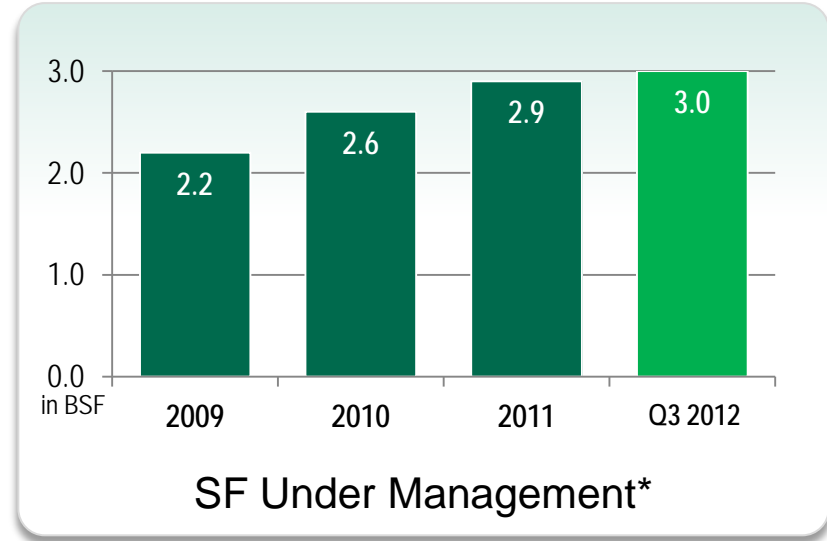
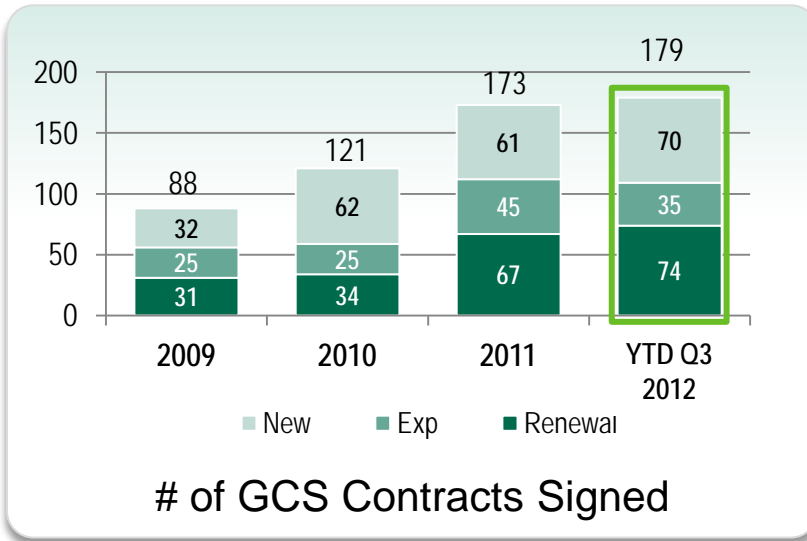
- Financial Services
- Telecom
- Technology
- Manufacturing
- Automotive
- Retail
- Healthcare
- Public Sector

CBRE is ranked  
4<sup>th</sup> in IAOP's Global  
Outsourcing 100



**CBRE**

# GCS Is a Growth Business













\*Includes property management and facilities management clients; does not include affiliates.

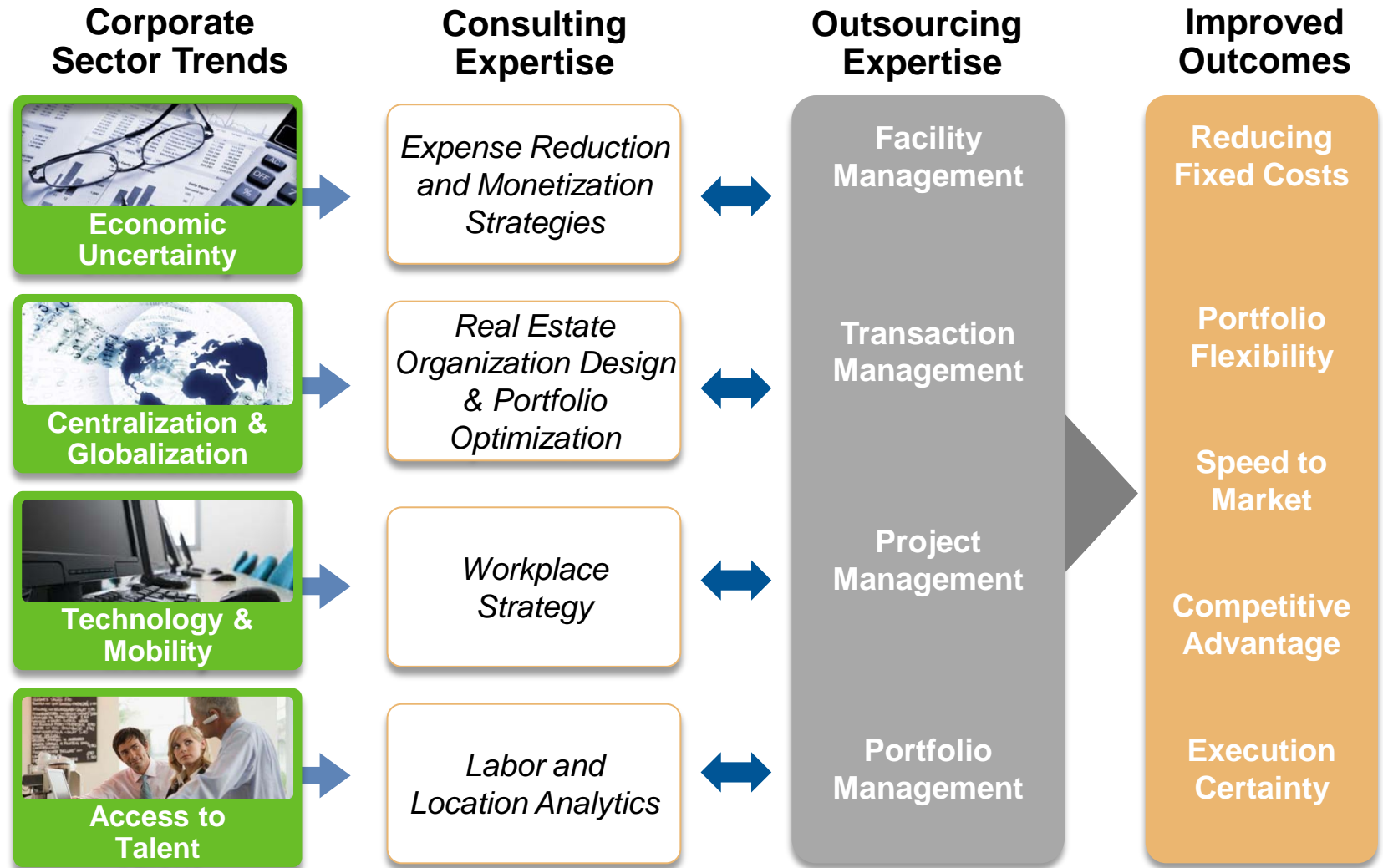
***“The GCS market is large and structurally attractive... and still relatively underpenetrated.”***

– McKinsey and Associates

# We Manage Five Levers to Sustain Growth

Term	Services	Geography	Industry	Asset Type
<p>Renew and extend term</p> <p>-----</p>	<p>Win/expand into new service lines</p> <p>-----</p>	<p>Win/expand into broader geography</p> <p>-----</p>	<p>Penetrate new and emerging markets</p> <p>-----</p>	<p>Win/expand into new asset types</p> <p>-----</p>
<p></p> <p><i>US</i></p> <p><i>FM, Cell Towers</i></p> <p>-----</p>	<p></p> <p><i>Americas</i></p> <p><i>FM, 20 MSF</i></p> <p>-----</p>	<p></p> <p><i>Retail – Canada</i></p> <p><i>Terminals – US</i></p> <p>-----</p>	<p></p> <p><i>Healthcare</i></p> <p><i>FM, 3.6 MSF</i></p> <p>-----</p>	<p></p> <p><i>Waste Facilities</i></p> <p><i>Consulting</i></p> <p>-----</p>
<p></p> <p><i>Global</i></p> <p><i>Full Service</i></p>	<p></p> <p><i>Canada</i></p> <p><i>TM, 11 MSF</i></p>	<p></p> <p><i>APAC to US</i></p> <p><i>TM &amp; Consulting</i></p> <p><i>8 MSF</i></p>	<p></p> <p><i>Healthcare</i></p> <p><i>TM, 225K SF</i></p>	<p></p> <p><i>Government Facilities</i></p> <p><i>Consulting</i></p>

# We Lead with Expertise to Help Clients Respond to a Changing Business Landscape



# Sector Spotlight: Momentum in Healthcare



**Rising  
Cost of  
Healthcare**



**Regulatory  
Change**



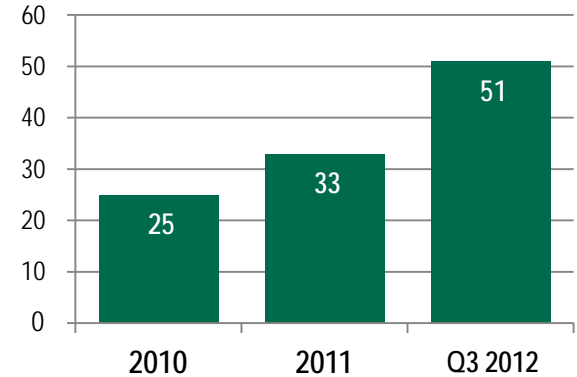
**Demographic  
Shifts**



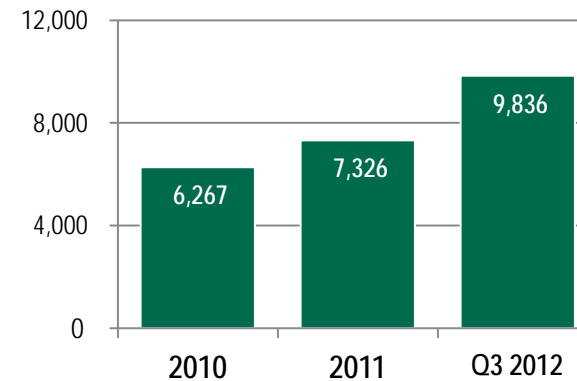
**Hospital  
System  
Consolidation**



**CBRE  
Growth  
in Acute  
Care  
Hospitals**

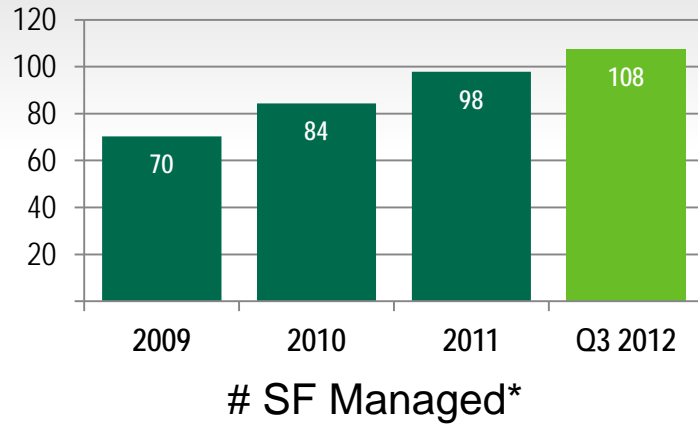


**Growth  
in Hospital  
Beds  
Managed  
by CBRE**

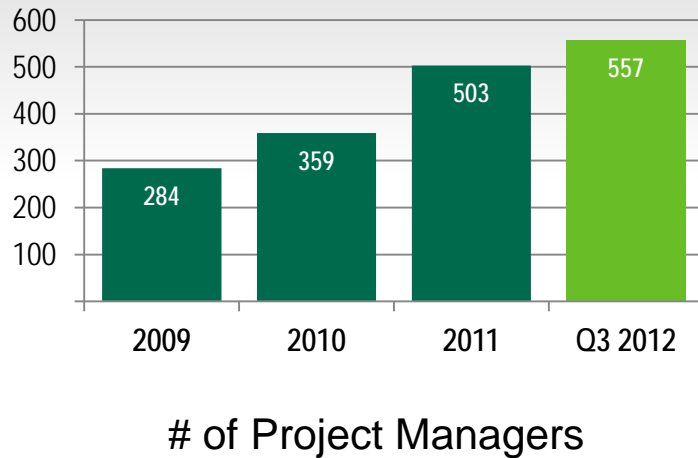


# Geographic Spotlight: Growth Momentum in India

in MSF\*



\*Includes property management and facilities management clients.



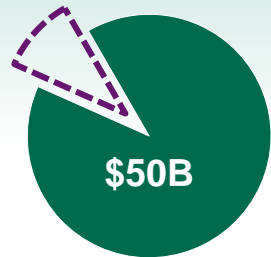
**CBRE India Today**

- 9 Offices
- 2,760+ Employees
- 108M SF Under Mgmt
- 557 Project Managers

Sample Clients:

GE imagination at work | HP | HSBC The world's local bank | DELL

# Market Attributes Remain Favorable for Continued Growth



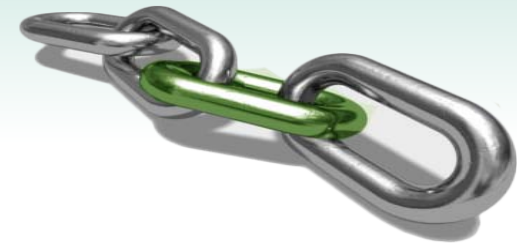
**GCS Estimated Market Size and Potential\***



**Emerging Markets & Sectors**



**CRE Centralization**



**Supply Chain Rationalization**

\*Source: McKinsey & Co.



# Key Strategic Priorities for 2013



Drive growth through sustaining satisfaction and identifying new points of entry with existing clients



Continue investing in GCS platform to ensure capacity (consulting practice, technology, energy, sourcing, etc)



Accelerate portfolio momentum by targeting attractive vertical markets and focusing on global growth



Enhance our industry leadership position