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Decoding India's GCC Ecosystem

Bengaluru Edition

2026

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GCC SUMMIT 2026

Presented by

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Executive Summary

- India's GCC ecosystem has transformed from a cost-arbitrage model into a strategic, innovation-led and decision-making engine. The number of GCCs crossed 1,800 in 2025 and is projected to exceed 2,400 by 2030, spanning AI, digital engineering, analytics, R&D, and enterprise platforms.

- In FY25, GCCs generated an estimated USD 241 billion in total economic output, including direct, indirect, and induced effects. Direct output reached USD 76 billion, growing more than six-fold since 2010, and is expected to nearly double by 2030.

- GCCs contributed USD 182 billion in Gross Value Added (GVA) in FY25 with direct GVA equivalent to 2% of India's GDP and 4% of services GDP, positioning them as a core driver of economic growth.

- In FY25, GCCs delivered USD 62 billion in net exports with high forex retention due to negligible import dependence.

- GCCs supported 10.4 million jobs, including 2.1 million direct employees. Productivity levels remain globally competitive with per-capita GVA of ~USD 32,500 comparable to advanced economies and more than eleven times the Indian national average.

- Karnataka, led by Bengaluru, remains the anchor of India's GCC ecosystem. The state hosts around 30% of all GCCs, 32% of talent, and 34% of market value. Bengaluru alone accounts for over 40% of national GCC leasing activity,

- GCCs are transitioning into "Decision Centers"—co-owning global strategy, leading digital transformation, and influencing governance, resilience, and ESG agendas at an enterprise level.

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Unlock Global Insights With Dun & Bradstreet's Country Insight Reports

Dun & Bradstreet's Country Insight Reports and Snapshots provide essential forecasts and business recommendations for 132 economies, empowering your business to navigate emerging challenges and seize opportunities for market expansion and long-term investment.

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- Forecasts and Business Recommendations: Stay ahead of the curve with clear, actionable insights tailored to each economy
- Concise, Visual Overview: At-a-glance graphics allow for easy identification of market trends and risks
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Compare Exposure Levels: Assess and compare your country risk exposure through our proprietary data, giving you a clearer understanding of your global footprint

Ensure Business Continuity: Evaluate supply chain vulnerabilities, mitigate potential disruptions, and uncover emerging market opportunities

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Lt Gen M Unnikrishnan Nair (retd)
Chairman – 63SATS Cybertech &
Former National Cyber Security
Coordinator Government of India

India is entering a defining phase in the evolution of GCCs. What began as a model focused on cost efficiency has steadily transformed into a powerful engine of innovation, technology development, and strategic decision-making for global enterprises. Today, India's GCC ecosystem is being shaped by three defining pillars - being smart, skilled, and scalable - as organizations increasingly rely on these centers to drive digital transformation and enterprise growth.

However, as GCCs become more technology-driven and deeply integrated into global operations, the importance of cybersecurity has grown significantly. The rapid adoption of artificial intelligence, cloud platforms, and interconnected digital systems has expanded the threat surface for organizations worldwide. More concerning is the weaponisation of AI, where cyber adversaries are using advanced technologies to launch highly sophisticated attacks, ranging from AI-generated phishing campaigns and deepfake impersonation to automated vulnerability exploitation.

At the same time, the current geopolitical landscape is adding another layer of complexity. Rising regional tensions, economic uncertainties, and the growing convergence of cyber and kinetic conflicts have demonstrated that digital infrastructure is increasingly becoming a strategic target. For multinational organizations operating GCCs, geopolitical disruptions can translate into cyber espionage, ransomware campaigns, or coordinated attacks aimed at disrupting business continuity.

In this evolving environment, cybersecurity can no longer be treated as a support function. It must be embedded as a strategic pillar of GCC operations. Organizations must move toward security-first architectures, adopting zero-trust frameworks, strengthening threat intelligence capabilities, and ensuring continuous monitoring of digital environments. Equally critical is building a skilled cybersecurity workforce and embedding a culture of cyber awareness across teams.

India's GCC ecosystem has the talent, scale, and technological depth to lead the next phase of global enterprise transformation. Ensuring that these centers remain secure, resilient, and trusted will be essential to sustaining that leadership.

At 63SATS, we believe that protecting digital infrastructure requires a proactive and intelligence-led approach. Through advanced threat monitoring, real-time incident response, and integrated cybersecurity solutions, 63SATS supports organizations in strengthening their cyber resilience. As GCCs continue to evolve into strategic nerve centers for global enterprises, robust cybersecurity will remain central to enabling their safe and sustainable growth.

JLL SEE A BRIGHTER WAY

While your HQ rests, your India GCC delivers

Your markets sleep. Your operations won't.

Time zones aren't just geography, they're competitive strategy. Over 2,000 global enterprises leverage India's temporal advantage to compress development cycles, extend customer coverage, and operate continuously. The question isn't "if"- it's "how do we maximize this advantage?"

Maximizing it requires expertise across every dimension of your India presence. From location strategy to workplace design, operational excellence to long-term portfolio management **- that's where JLL comes in.**

jll.com/gcc

Neehar Pathare
MD, CEO & CIO
63SATS Cybertech

With GCCs emerging as AI powerhouses, how are you securing AI models, data flows, and autonomous operations effectively?

As GCCs evolve into global engineering and AI innovation hubs, cybersecurity architecture must move from perimeter protection to model-centric and data-centric security. Our focus is on securing the entire AI lifecycle, from data ingestion and model training to deployment and autonomous decision environments.

We are strengthening architectures through zero-trust frameworks, secure data pipelines, and continuous model monitoring to guard against data poisoning, model manipulation, and supply-chain vulnerabilities. Equally important is embedding security by design into AI development workflows so that protection scales alongside innovation.

India's GCC ecosystem is operating at global scale, and with that comes systemic responsibility. Our approach is to combine advanced threat intelligence, automation, and resilient infrastructure so that high-autonomy digital operations remain both secure and trusted in an increasingly AI-driven world.

What core security foundations do GCCs need to build an "impenetrable cyberdome," and how does your platform strengthen that journey?

To achieve what we describe as an "impenetrable cyberdome," GCCs must first build security as an architectural foundation rather than an operational layer. This requires a combination of zero-trust identity frameworks, real-time threat intelligence, unified visibility across cloud and on-premise environments, and strong protection for data, APIs, and AI workloads. Just as important is the ability to detect and respond to threats at machine speed through automation and continuous monitoring.

At 63SATS, our platform is designed to help organizations move from fragmented security tools to a cohesive, intelligence-driven defense architecture. We integrate advanced analytics, automated threat detection, and resilient infrastructure protection to create a secure operating environment. The objective is not only to defend systems, but to enable GCCs to innovate and scale globally with confidence.

With GCCs leading global cyber mandates, how can your platform help them mature into full cyber command centers across detection, response, assurance, and secure AI?

GCCs are uniquely positioned to evolve from support functions into global cyber command centers that oversee enterprise-wide security operations. Our approach is to partner with GCCs by strengthening four foundational pillars: advanced detection, rapid response, continuous assurance, and secure AI operations.

We help establish integrated security operations environments that combine real-time threat intelligence, AI-driven monitoring, and automated incident response to manage risks at global scale. Equally important is embedding assurance frameworks and governance models that provide visibility across cloud, data, supply chains, and digital infrastructure.

As enterprises increasingly deploy AI across core operations, GCCs must also secure models, data pipelines, and decision systems. Our role is to provide the technology architecture, engineering expertise, and operational frameworks that enable GCCs to operate as resilient, intelligence-driven cyber command centers for the global enterprise. ■

Srinivas L
Joint MD & Joint CEO
63SATS Cybertech

You've highlighted that securing AI systems is now "existential" for enterprises. What unique AI-specific threat models should GCCs prioritise as they scale mission-critical global functions from India?

As AI becomes embedded in mission-critical enterprise operations, the threat landscape expands beyond traditional cybersecurity risks. GCCs must prioritise AI-specific threat models across the entire model lifecycle. These include data poisoning during training, where compromised datasets distort model behaviour; model manipulation or adversarial attacks that influence outputs; and model extraction, where attackers attempt to replicate proprietary algorithms.

Equally critical are risks in AI supply chains, including vulnerabilities in third-party models, libraries, and development frameworks. As enterprises deploy autonomous AI systems, decision integrity and model governance also become central concerns.

For GCCs managing global digital operations from India, securing AI requires strong data provenance controls, continuous model monitoring, secure MLOps pipelines, and robust access governance. Protecting AI is no longer just a technical priority, it is fundamental to safeguarding enterprise decision systems and operational trust.

63SATS has established an advanced SOC with AI-specific threat analysis and rapid incident response. How do you see GCCs leveraging such AI-augmented SOC capabilities to strengthen global resilience and reduce response times?

63SATS enables GCCs to strengthen enterprise-wide cyber resilience through its 24×7 Security Operations Centre. Powered by the 63SATS Cybertech Threat Intelligence Monitoring & Response Command Centre (TiM&RC), the platform delivers AI-driven threat analysis, continuous monitoring, and rapid incident response across distributed global environments. For GCCs that manage critical digital operations for multinational organizations, this capability helps significantly reduce detection and response times while ensuring uninterrupted operations. By integrating predictive threat intelligence with automated defense mechanisms, the framework accelerates cyber defense readiness through a "Shift Left" approach and simultaneously strengthens long-term cyber maturity through "Shift Right."

How are evolving global data regulations impacting cybersecurity frameworks within India's GCCs?

Evolving global data regulations are significantly reshaping cybersecurity frameworks within India's GCCs, pushing them toward more structured, accountable, and globally aligned security models. With regulations such as GDPR, DPDP, and other regional data laws, GCCs must now manage complex cross-border data flows while ensuring compliance with multiple jurisdictions.

This is driving a shift toward data localisation strategies, stronger encryption standards, and stricter access controls. Organisations are re-architecting systems to ensure data sovereignty, while maintaining operational efficiency for global mandates.

There is also a growing emphasis on governance, auditability, and real-time visibility. Compliance is no longer a checkbox exercise, it is becoming a core business enabler. GCCs that can seamlessly integrate regulatory requirements into their cybersecurity architecture will be better positioned to build global trust while continuing to scale AI-driven operations. ■

Five Payroll Conversations every GCC Leader is Having

BY VIKAS SAPRA, CHIEF REVENUE OFFICER, PEOPLESTRONG

In our conversations with HR and Finance leaders across India's GCC ecosystem, a few themes come up consistently. These are the questions that thoughtful leaders ask when they are genuinely invested in getting payroll right.

Can you build an integrated payroll engine?

Most GCC payroll operations involve more human touchpoints than leaders realize. True zero-touch payroll - where data flows seamlessly from HR and attendance systems into the payroll engine, with deep integrations to global HR platforms - is not only possible but increasingly the standard that leading organizations are moving toward.

How do we stay ahead of compliance?

India's statutory landscape is detailed and constantly evolving. GCC leaders want a payroll partner that tracks every regulatory change, flags risk proactively, and ensures the organization is always audit-ready - not just technically compliant.

How is Agentic AI is changing payroll?

Fundamentally. AI is now embedded across the payroll cycle-automating input verification, detecting anomalies, and flagging compliance risks in real time. We currently receive payslip queries in just 0.6% of cases and most of these are resolved at first contact via the Jinie chatbot and the Payroll Agent. AI Agents are helping employees understand their pay structure, optimize components, manage reimbursements, and get instant answers on deductions and entitlements.

What is the payroll experience for employees?

Mobile-first access to payslips, tax declarations, and reimbursement claims , all at the employee's fingertips - This is what modern payroll service looks like. Our payroll technology is 100% mobile enabled and help employees stay on top of their pay.

How secure is our payroll data?

GCC leaders increasingly want assurance that payroll infrastructure meets the same rigorous standards - SOC, GDPR, zero-trust architecture and more, applied everywhere else in the organization.

PeopleStrong runs India's largest payroll engine - built to answer every one of these questions, reliably, at scale.

Economic Impact of Global Capability Centers in India

Introduction

From a single pioneering center established by Texas Instruments in 1985, India's Global Capability Center (GCC) sector has grown into a vast network of over 1,800 entities in 2025, serving as the operational nerve centers for some of the world's largest corporations. These centers, once viewed primarily as low-cost service hubs, have rapidly evolved into engines of innovation, transformation, and enterprise value. Over the past decade, their expansion has accelerated, with GCCs now playing a strategic role in core business functions ranging from R&D and product design to analytics, AI, and global operations. By 2030, the number of GCCs is expected to exceed 2,400, underscoring India's emergence as the world's preferred destination for high-value global services. This report unpacks the scale, impact, and transformative potential of India's GCC sector - across economic value, employment, innovation, and regional development.

Framework for Estimating Economic Impact of India's GCC Sector – The Three Channels

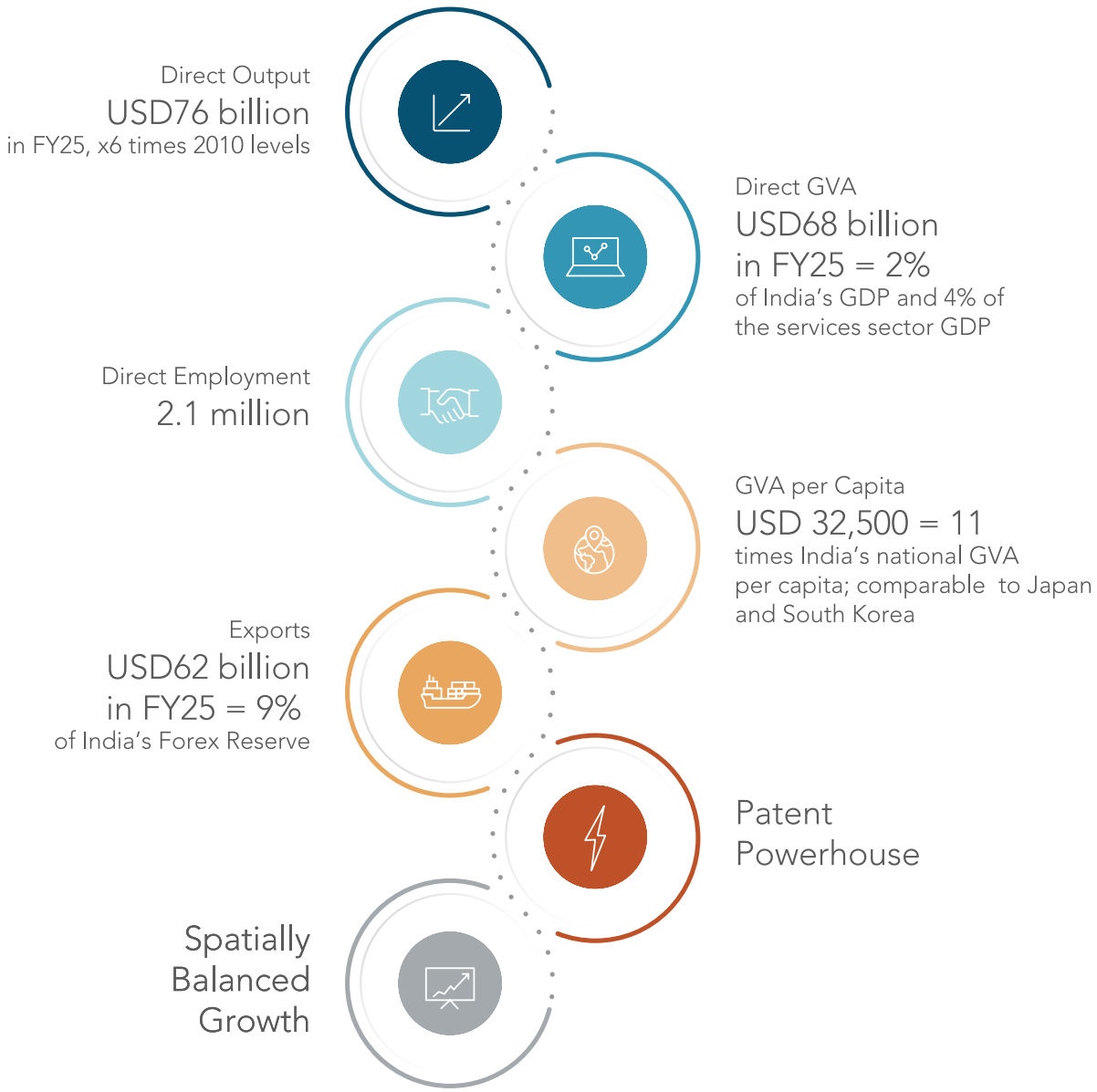
Direct Impact: Represents the economic value added directly by GCCs through their operations in India.

Indirect Impact: Captures the economic activity stimulated along the GCC value chain. This includes business generated for vendors, service providers, and technology partners supporting GCC operations. Indirect impact reflects the extended ecosystem created around GCCs.

Induced Impact: Reflects the wider economic effects driven by consumption spending of employees working in GCCs and their supply chains. This includes spending on housing, retail, education, and other goods and services, which boosts local economies.

While Direct impact is derived from aggregated financial data sourced from leading GCCs and industry sources, indirect and induced impacts have been estimated using a Dun & Bradstreet economic impact assessment model, which applies sector-specific multipliers based on India's input-output tables. These multipliers quantify how activity in one sector stimulates activity in others.

Economic Impact – At a Glance

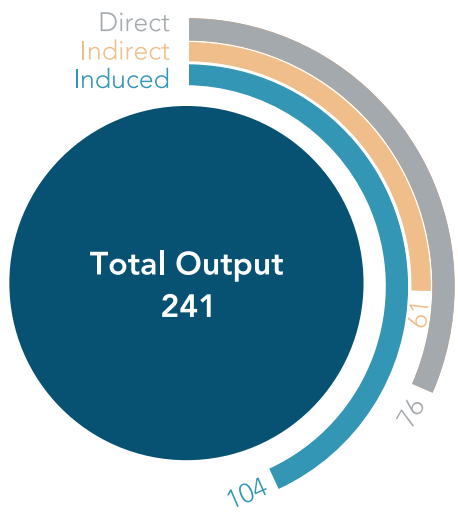


Impact on Output

India's GCC sector has evolved into a formidable pillar of the modern economy, powering **USD241 billion in economic activity** in FY25 alone. Of the total, USD76 billion stems from direct output, while USD61 billion flows through supply chain linkages, and a further USD104 billion emerges from induced consumption across the broader economy.

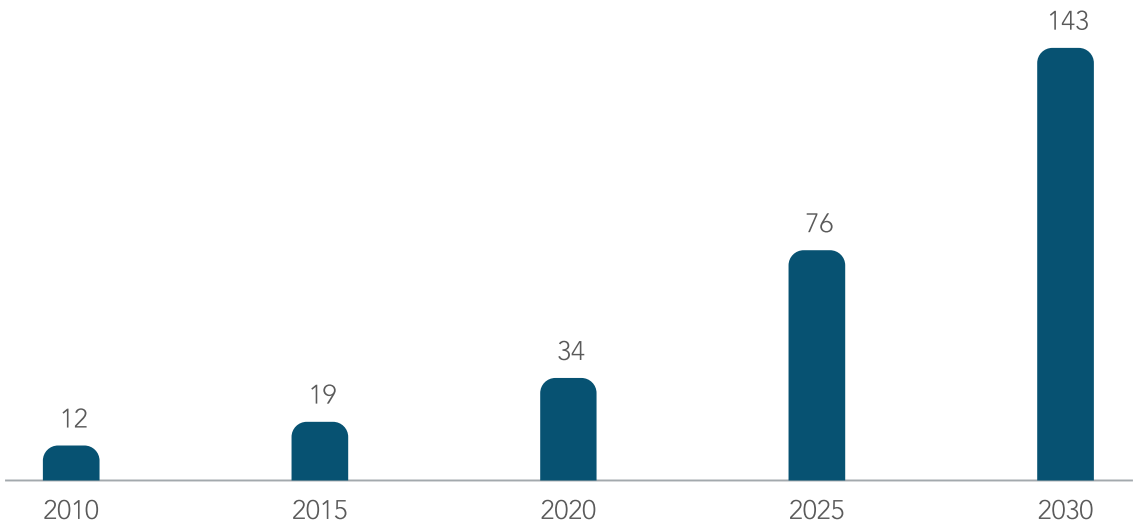
What stands out is the remarkable velocity of growth in direct output. In just 15 years, GCCs have scaled their **direct economic contribution** to **USD76 billion** in 2025 - **more than six times** the USD12 billion recorded in 2010 - reflecting a 13% compound annual growth rate (CAGR)..

GCC Sector Contribution to Output by Channels of Impact (USD billion)



The next chapter is likely to be just as transformative. By 2030, direct output is projected to reach USD143 billion, driven by a decisive pivot from transactional processes to high-value functions such as AI/ML engineering, advanced analytics, cybersecurity, and global product ownership. As global firms deepen their reliance on India's talent and innovation ecosystems, **GCCs are no longer back offices - they are becoming nerve centers of global enterprise strategy.**

GCC Sector Direct Contribution to Output (USD billion)



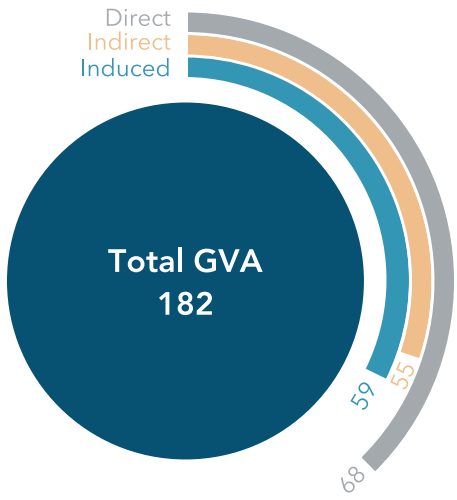
Source: Dun & Bradstreet

Impact on Gross Value Added (GVA)

While both output and GVA measure economic activity, they represent different stages in the value chain. Output refers to the total value of goods and services produced, including the value of intermediate inputs used in production. GVA, on the other hand, isolates the net contribution by subtracting the value of intermediate consumption from output. In essence, GVA reflects the actual economic value created by an entity – through wages, profits, and taxes – whereas output captures the broader transactional volume, including pass-through costs.

In FY25, the GCC sector added an estimated **USD182 billion in GVA, more than the GVA of 25 Indian states and Union Territories.** This includes USD68 billion in direct GVA, USD55 billion in indirect contributions via supply chains, and USD59 billion in induced impact through consumption.

GCC Sector Contribution to GVA by Channels of Impact (USD billion)

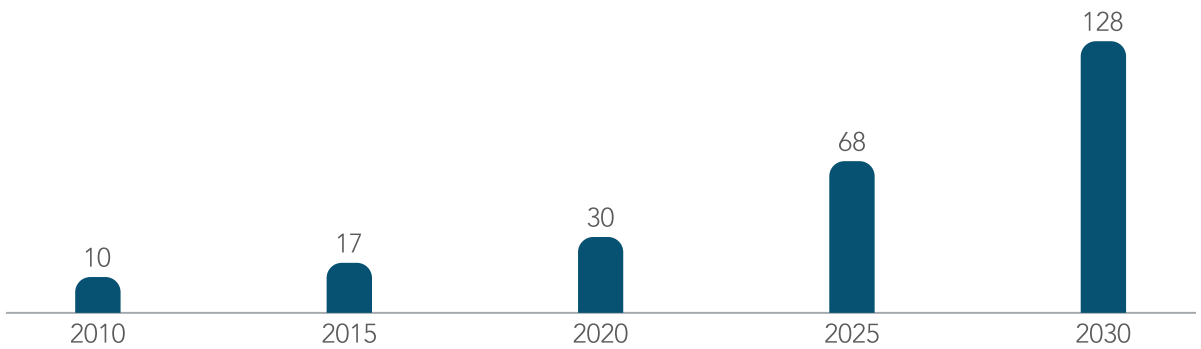


Source: Dun & Bradstreet

The direct GVA alone equals **2% of India's GDP** and **4% of the services sector GDP.** This places GCCs among the most consequential economic actors in India's services-led growth story, rivalling some of the largest domestic industries in value creation.

The growth trajectory has been nothing short of remarkable. From just USD10 billion in direct GVA in 2010, the sector's contribution has scaled to **USD68 billion** in 2025 - around **seven times** the level recorded in 2010. Looking ahead, direct GVA is expected to rise to USD128 billion by 2030, driven by the sector's ongoing transition into higher-order capabilities.

GCC Sector Direct Contribution to GVA (USD billion)



Source: Dun & Bradstreet

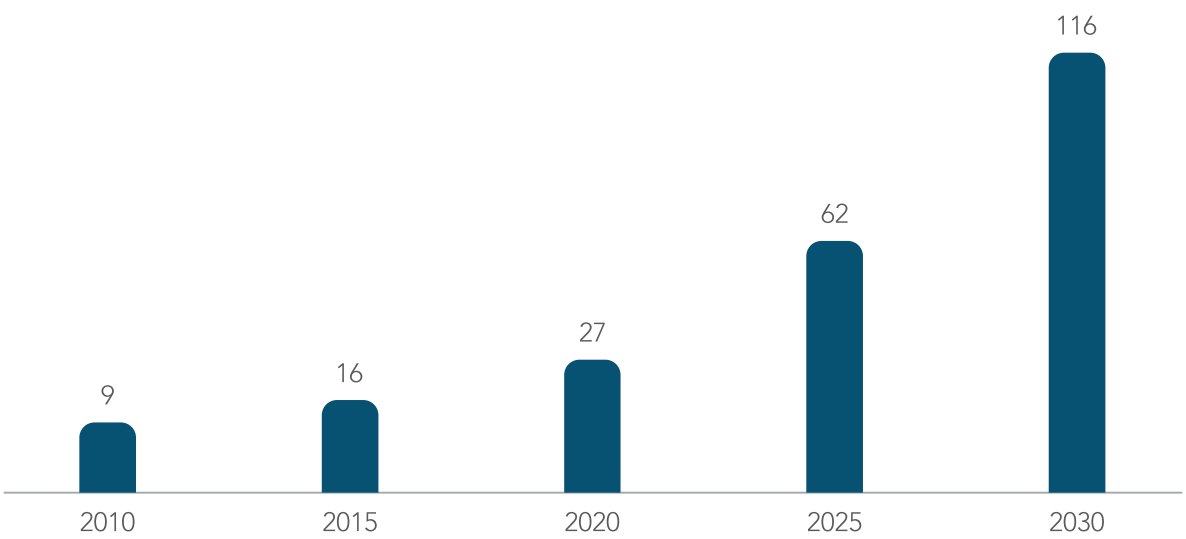
Impact on Exports

For most GCCs, revenues earned are synonymous with exports, making the sector a vital contributor to India's foreign exchange earnings. That said, the export numbers should be viewed through a more discerning lens.

A significant portion of GCC activity reflects a shift in the delivery model, with global companies moving work from third-party Indian IT vendors to their own captive centers in India. While the underlying services continue to be delivered from India, the associated export revenue transitions from IT services firms to GCCs. This phenomenon of intra-sector cannibalization necessitates a more calibrated view of net export growth.

After adjusting for this compositional shift, we estimate that GCCs contributed **USD62 billion in net exports in FY25,** a sharp rise from USD9 billion in 2010. By 2030, this figure could reach USD116 billion.

GCC Sector Direct Contribution to Exports (USD billion)



Source: Dun & Bradstreet

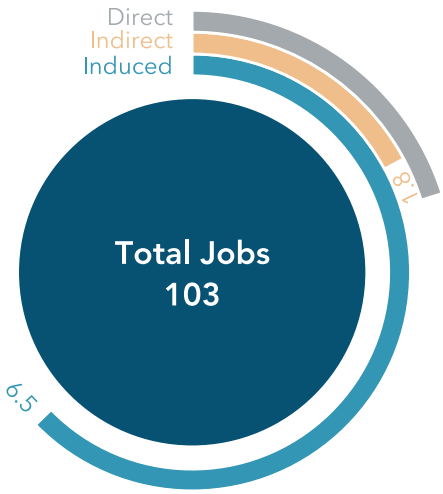
What sets the GCC export model apart is its **exceptionally high net forex retention.** Unlike merchandise or industrial exports, which depend heavily on imported inputs, GCCs operate with near-zero import intensity. As a result, nearly every dollar earned flows directly into the country's reserves. At USD62 billion, GCC exports in FY25 are equivalent to **9% of India's total forex reserves,** a striking indicator of the sector's strategic value in strengthening macroeconomic buffers.

Impact on Employment

The GCC sector supported an estimated **10.4 million jobs in FY25,** comprising **2.1 million direct employees,** 1.8 million in allied industries, and a substantial 6.5 million through induced employment.

What makes this employment footprint distinctive is not just its scale, but its quality. GCCs typically offer salaries significantly above national and sectoral averages, especially for early- and mid-career professionals. This income premium drives higher discretionary consumption across urban centers - ranging from housing and education to retail and mobility - which, in turn, amplifies the sector's induced impact.

GCC Sector Contribution to Employment by Channels of Impact (million)



Source: Dun & Bradstreet

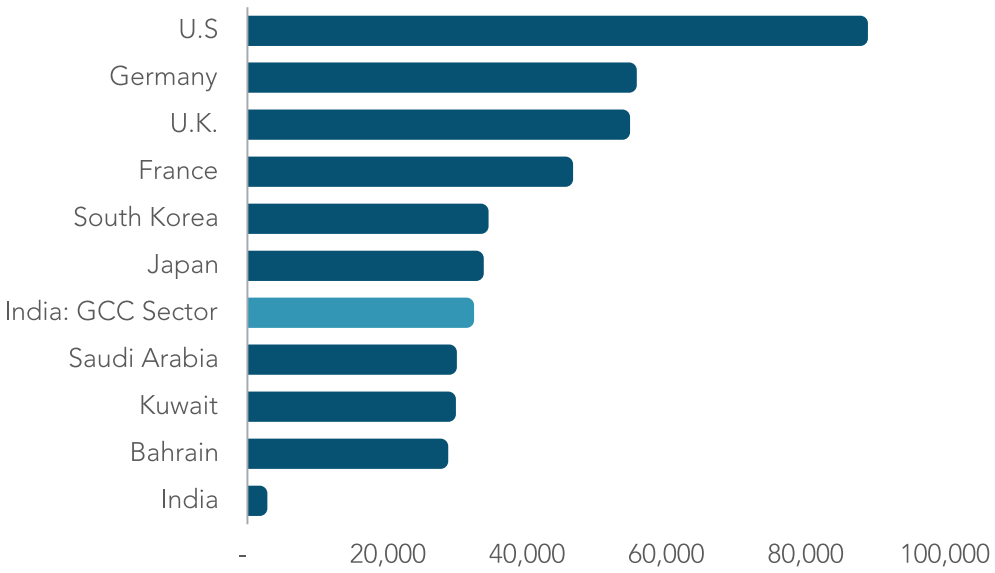
This is evident in the employment composition itself: induced jobs outnumber direct roles by over 3:1, reflecting the high-multiplier nature of the GCC ecosystem. Unlike labor-intensive industries that rely on volume, GCCs create economic value through skills, specialization, and spending power - **turning intellectual capital into a flywheel for broader economic activity.**

Impact on Productivity

In FY25, GCCs are estimated to have generated USD68 billion in direct GVA through a workforce of 2.1 million professionals, translating to a per capita GVA of approximately **USD32,500.**

This is more than **11 times India's national GVA per capita, and comparable to levels seen in advanced economies like Japan and South Korea.** As GCCs continue to move up the value chain their productivity is poised to expand further.

GDP Per Capita (USD)



Source: IMF, Dun & Bradstreet

This exceptional productivity stems from the high-skill, high-value nature of GCC roles, which are increasingly focused on areas such as digital transformation, advanced analytics, and risk management. Unlike traditional service delivery models, GCCs operate as integral extensions of global headquarters, driving strategic work rather than executing just transactional tasks.

Moreover, GCCs benefit from cutting-edge digital infrastructure, domain specialization, and process automation, enabling each employee to generate significantly more value per unit of time. This shift toward capability-driven mandates over labor-arbitrage models has been central to their outsized productivity.

Impact on Innovation

India's GCCs have rapidly evolved from back-office support centers into core innovation hubs for global enterprises, driving product development, digital transformation, and IP creation at scale. Nowhere is this more visible than in life sciences and healthcare, where GCCs have attracted over USD7 billion in FDI, accounting for **nearly one-third of total FDI into India's pharmaceutical sector.** Today, many global companies entrust their Indian GCCs with mission-critical R&D, resulting in tangible gains across productivity, cost efficiency, and business impact.

AstraZeneca – Reinventing Training Through Virtual Reality

At AstraZeneca's Innovation and Technology Centre in Chennai, a virtual reality headset is all it takes to step inside a high-fidelity interactive digital replica of the company's Swedish manufacturing facility. Developed entirely by the India-based GCC, the platform enables operators to learn drug production processes without ever entering a physical plant. The impact? Significant cost savings and zero material wastage during training, marking a breakthrough in how pharma companies scale complex skills globally.

Lowe's – Transforming Checkout with In-House Tech Innovation

Retail giant Lowe's turned to its Bengaluru GCC to overhaul its in-store checkout experience. The result: a proprietary self-checkout system that now handles 40 to 50% of all transactions, up from 25% earlier. Built at a fraction of vendor costs - and with higher stability - the solution is now being rolled out across 1,700+ stores in the U.S., demonstrating how India's GCCs are not just cost centers, but profit accelerators.

Hexagon – Building a Patent-Rich Software R&D Hub

At Hexagon's Hyderabad facility, its largest R&D site globally, 2,100 engineers work at the intersection of software and engineering. The center has amassed a robust portfolio of software-based patents, supporting every product division within the company and reinforcing India's position as a strategic IP creation hub.

Novartis – Advancing Drug Discovery and Clinical Trials

At its Hyderabad Global Capability Centre, Novartis is rewriting the playbook on how large-scale drug development can be driven from India. With over $300 million invested in the last five years and a team of 9,000 professionals, the site has become the company's second-largest global location after its headquarters in Basel.

This center plays a pivotal role in clinical development - leading end-to-end execution of trials, generating critical data, and transforming experimental molecules into life-saving medicines. As of July 2024, the Hyderabad hub was actively managing 52 clinical trials across 335 sites, involving approximately 2,000 enrolled patients.

Fueling this engine of innovation are 350+ highly skilled scientists, including PhDs, post-doctorates, and Masters-level experts, who are dedicated to advancing the pharmaceutical development of new chemical entities. In doing so, the center exemplifies how GCCs are at the forefront of life-saving innovation.

GE – Driving Multisector Innovation

GE's John F. Welch Technology Centre (JFWTC) in Bengaluru is the company's largest integrated multidisciplinary research and development center outside the U.S., housing over 5,000 engineers and contributing more than 3,500 patents to GE's global portfolio. The center drives end-to-end innovation across aviation, healthcare, energy, and renewables, underscoring the pivotal role Indian talent plays in shaping next-generation industrial solutions.

Impact on Regional Development

India's GCC expansion story is no longer confined to its major metros. Over the past few years, there has been a notable shift toward Tier-2 and emerging cities, catalyzed by structural advantages. More than 200 GCCs have established operations outside traditional hubs like Bengaluru, Hyderabad, and Chennai - bringing global work to cities such as Coimbatore, Kochi, Mysuru, Indore, Jaipur, and Bhubaneswar.

The rationale is compelling. Operating costs in these locations are 25 to 30% lower than in Tier-1 cities, driven by more affordable real estate and a lower total cost of talent. At the same time, these cities offer access to deep, underutilized talent pools, particularly in engineering and emerging tech roles, thanks to the presence of high-quality academic institutions and improving digital infrastructure.

The impact is already visible. Jaipur, for instance, has surged up the ranks in Dun & Bradstreet's City Vitality Index - which tracks economic activity across all Indian districts. From a rank of 63 in Q1 2023, Jaipur jumped to 19 in Q1 2024, and further to 15 in Q1 2025, underscoring how GCC-led growth is helping unlock latent potential in emerging cities.

This decentralization is fostering more **inclusive economic development,** generating employment, upgrading local ecosystems, and reducing urban migration pressures. As a result, GCCs contribute to a more **spatially balanced and resilient growth model** for India.

Looking ahead, the trend is expected to accelerate, particularly as hybrid work models, policy incentives, and infrastructure investments make next-wave cities viable destinations for high-value global work.

Pavan Kumar Yogender
Founder & CEO
Zertain India Private Limited

Zertain
automate.integrate.manage

How is Zertain helping enterprises accelerate efficiency through hyperautomation and AI-driven automation across workflows and systems?

Zertain takes a consulting-first, outcome-driven approach to hyperautomation. Our engagements begin with AI-powered automation discovery — assessing existing processes, identifying bottlenecks, and building a prioritized automation roadmap with projected ROI, so clients move from exploration to execution in weeks rather than months.

On the delivery side, we operate across the full automation stack: BMC Control-M for enterprise workload automation and batch orchestration across hybrid and cloud environments; Workato for business process automation and application integration, eliminating manual handoffs and enabling real-time data flow; Creatio for no-code workflow automation in CRM and operational processes; and Caspio for rapid application development, where we are the sole global Platinum partner.

We've also developed proprietary AI-powered tools that address enterprise-wide challenges like SaaS spend optimization and intelligent automation discovery.

What differentiates Zertain is that we bring all of these capabilities under one roof. Our clients in BFSI, healthcare, and media get a single, unified automation strategy and execution partner — not four different vendors for scheduling, integration, CRM, and AI.

What role do low-code and no-code platforms play in modernizing enterprises, and how is Zertain enabling faster development and integration using these tools?

The biggest barrier to enterprise modernization isn't technology — it's speed. Organizations have backlogs of hundreds of automation and application requests that IT teams simply cannot deliver fast enough through traditional development. Low-code and no-code platforms fundamentally change this equation by collapsing delivery timelines from months to weeks and putting the power of application development closer to the people who actually understand the business processes.

At Zertain, we've built our entire delivery model around this principle. Through our partnerships with low code nocode OEM, we help enterprises rapidly deploy CRM workflows, custom operational applications, and cross-platform integrations — without the cost, complexity, or technical debt of conventional development. The real shift we drive for our clients isn't just faster delivery — it's ownership. When business teams can configure and evolve their own workflows, IT stops being a bottleneck and starts being a strategic enabler.

As organizations move toward scalable, connected digital ecosystems, how is Zertain supporting end-to-end enterprise integration and preparing clients for the next phase of digital transformation?

We sit at the integration layer of the enterprise — connecting workload automation, business applications, data pipelines, and AI capabilities into a cohesive, scalable ecosystem. Whether it's orchestrating mission-critical batch processes through BMC Control-M, wiring real-time integrations across cloud and on-premise systems through Workato, or building operational applications on Creatio and Caspio that feed directly into this connected fabric — we ensure our clients aren't just digitizing processes in isolation but building an enterprise architecture that scales with them. The goal is simple: every system talks to every other system, data flows where it needs to, and the business operates as one connected organism rather than a collection of disconnected departments. ■

Deepak Vyavahare
Area Vice President – India
World Wide Technology

How is WWT driving the evolution of India's GCCs into innovation-led strategic centres?

WWT has supported the expansion of American and European GCCs in India for eight years, helping organizations deploy end-to-end IT infrastructure across networks, security and data centers. As GCCs evolve from execution-led centers to strategic hubs for innovation and product development, WWT works closely with these teams to enable this shift and support technology decisions increasingly being driven from India.

Beyond systems integration, WWT brings consulting, engineering and domain expertise across AI, cloud, data, cybersecurity, automation and digital transformation, helping GCCs architect and implement complex digital initiatives aligned with global priorities. With our engineering-led culture, Integration Centers for pre-building solutions, and the Advanced Technology Center — WWT's USD one-billion global lab — GCC teams can test and validate technologies before production, accelerating innovation while reducing risk and time to market.

How does WWT help enterprises scale AI while modernising their cloud and data foundations?

WWT helps enterprises move from AI vision to real-world impact through strategic consulting, advanced engineering and modern infrastructure design. As organizations scale AI, GCCs in India play a growing role, and WWT works with these teams to modernize cloud and data platforms for large-scale AI workloads.

We define AI roadmaps, modernize infrastructure and help operationalize use cases such as generative AI, computer vision, digital humans and NLP. Through WWT's AI Proving Ground, organizations can test and train AI on a full infrastructure stack and explore pre-built use cases like digital twins and AI assistants.

With deep partnerships across hyperscalers, data platforms and AI providers, WWT enables enterprises and their GCCs to move beyond experimentation and deploy AI at scale with lower risk and faster time to value.

How is WWT securing digital transformation, and what's next for customers?

As enterprises expand digital innovation through their GCCs in India, security must be embedded from the start. WWT treats security as a foundational layer across every digital transformation program, integrating risk management, identity, data protection and resilience across the full lifecycle — from strategy and architecture to implementation and operations. Security is built into every layer of the stack, including cloud, network, applications and data.

Through WWT's Advanced Technology Center and Cyber Range, organizations can validate architectures, test against real-world threats and assess operational readiness before global deployment.

Looking ahead, WWT will deepen its focus on zero trust architectures, autonomous security operations, AI-enabled security, and cyber resilience — enabling enterprises and their GCCs to innovate confidently while reducing risk, strengthening resilience and meeting global regulatory requirements. ■

Aditya Hans
Partner
Dhruva Advisors India Private Limited

dhruva
A Ryan LLC Affiliate

From Setup to Scale: Tax as a Strategic Pillar for Future-Ready GCCs

What are the key tax reforms in Budget 2026 for global MNCs setting up mid-size and large GCCs in India, particularly around transfer pricing certainty and dispute resolution?

Budget 2026 enhances tax certainty for global MNCs establishing GCCs in India. Historically, these GCCs faced ambiguity in determining appropriate transfer pricing mark-ups, with prescribed rates ranging between 17% and 24% across IT, ITeS, KPO, and contract R&D services. For mid-size GCCs, the Safe Harbour regime (SHR) has been simplified by consolidating IT/ITeS/KPO/R&D into a single "IT Services" category with **a uniform 15.5% mark-up.** The turnover threshold has also been increased to **INR 20,000 million** (~USD 213 million), making the regime accessible to more GCCs.

For large GCCs i.e., with turnover higher than INR 20,000 million (~USD 213 million), Budget 2026 introduces a fast-track unilateral APA process for IT/ITeS services, with a targeted **2-year timeline** (vs. up to 5 years earlier), improving dispute resolution and planning certainty, making APA a viable option to dispute resolution. Mid-size GCCs can also look at APAs to explore the possibility of a lower mark-up than 15.5%.

How are Indian states rolling out incentives for global MNCs looking to set up GCCs?

Indian states are offering a broad mix of incentives to attract GCCs, covering **capital support, real estate and infrastructure benefits, talent and employment incentives, operational cost savings, and ease of doing business measures.**

States with well-defined policies include **Karnataka, Maharashtra, Uttar Pradesh, Tamil Nadu, Andhra Pradesh, Odisha, Madhya Pradesh, Haryana, Gujarat, and Telangana** while **Rajasthan and Bihar** also have recently introduced GCC policies**.** Together, these aim to lower setup and operating costs while enabling faster and smoother market entry for global MNCs.

GIFT City also offers a compelling alternative for GCCs, particularly in financial services, through its IFSC framework, with built-in advantages such as tax incentives, regulatory relaxations, and globally benchmarked infrastructure.

What new tax measures around data centres have been introduced, and how might they influence GCCs' long term strategies?

Budget 2026 introduces **a long-term tax exemption until 2047 for foreign companies procuring data centre services from specified Indian data centres,** positioning India as a highly attractive jurisdiction for IT infrastructure. Foreign companies can now establish their wholly owned subsidiaries in India for data centre management, qualifying for a SHR mark-up of 15%, thereby making data centre operations in India more financially viable.

For GCCs, the strategic implications are substantial. The exemption enhances operational resilience, aligns scalability with a **supportive and certain tax regime,** and encourages capital investment, joint ventures, and deeper global participation, embedding India more firmly into the global digital supply chain. ■

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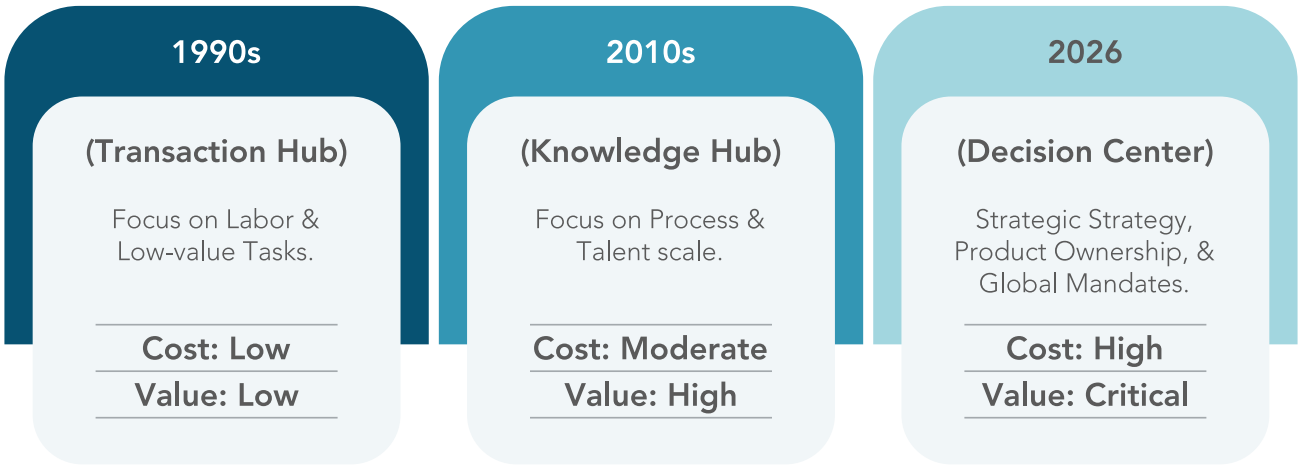
GCC Ecosystem in India

Global Capability Centres (GCCs), also referred to as Global In-house Centres (GICs), are offshore units established by multinational companies to support their global operations. These centres deliver a wide range of services—including IT, finance, human resources, and analytics—to their parent organizations.

INDIA'S GCC SHIFT: FROM TRANSACTION HUBS TO DECISION CENTERS

Introduction

The evolution of Global Capability Centers (GCCs) in India reflects a remarkable journey—from performing labor-intensive, transactional work to becoming strategic decision-making engines for global enterprises. Over three decades, GCCs have steadily moved up the value chain, reshaping their mandate in line with technology maturity, organizational expectations, and India's expanding talent advantage. Today, GCCs are no longer peripheral support units; they are integral to enterprise transformation, product leadership, and global operations.



Source: Inductus Group

The 1990s: GCCs as Transaction Hubs

In their earliest phase, GCCs functioned primarily as transaction hubs, focused on executing high volume, rule based, low complexity tasks. This period was defined by:

- Strong emphasis on labor arbitrage and cost reduction
- Processes that were largely repetitive, standardized, and back office focused
- Limited strategic involvement or decision making responsibilities
- High dependency on global headquarters for direction and oversight

Cost Profile: Low
Value Contribution: Low

During this era, organizations viewed GCCs chiefly as operational extensions designed to improve efficiency rather than as centers of expertise.

The 2010s: GCCs Mature into Knowledge Hubs

The next major shift occurred in the 2010s, when GCCs evolved into knowledge hubs responsible for delivering deeper expertise, process excellence, and capability building. With maturing talent pools and access to specialized skills, GCCs began playing a more active role in driving enterprise-wide efficiency and innovation. This phase was characterized by:

- Expansion into domain rich and knowledge intensive functions
- Adoption of analytics, automation, engineering, and digital operations
- Greater ownership of processes and delivery outcomes
- Increasing influence in global program execution
- Steady movement from cost savings to value creation

Cost Profile: Moderate
Value Contribution: High

GCCs began evolving from execution engines to true capability centers, supporting transformation programs and emerging as a dependable source of specialized talent for global corporations.

2026 and Beyond: GCCs as Decision Centers

By 2026, GCCs are expected to reach their most advanced stage of maturity: the Decision Center model. In this phase, GCCs are no longer satellite units—they operate as strategic partners that shape enterprise direction, lead global mandates, and deliver business outcomes. The defining attributes of this phase include:

- Leadership of strategic initiatives rather than just operational programs
- Ownership of end to end products, platforms, and digital assets
- Centers anchoring AI first, cloud native, and data driven transformation
- Strong global integration, with teams influencing or co owning enterprise decisions
- A talent mix optimized for innovation, engineering, and strategic problem solving
- Growing participation in global governance, enterprise risk, and future readiness

Cost Profile: High
Value Contribution: Critical

At this stage, GCCs represent the highest concentration of capability, innovation, and leadership outside the headquarters, positioning India as a central pillar of many organizations' global operating models.

Key Drivers Accelerating the Evolution of GCCs in India

The transformation of India's GCC ecosystem has been shaped by a powerful combination of structural strengths, policy momentum, and enterprise wide shifts. Together, these drivers have propelled GCCs from labor focused transaction hubs to high value decision centers that anchor global strategy and innovation.

Deep and Diverse Talent Advantage

India's talent ecosystem remains the single largest catalyst behind GCC growth. The country offers a uniquely scalable blend of technical, analytical, and domain specialized skills—spanning engineering, digital, R&D, finance, cybersecurity, and AI. As enterprises expand their global mandates, India's workforce provides both the depth for complex operations and the agility required for innovation centric roles. This talent availability has enabled GCCs to transition from process execution to knowledge creation and, now, to strategic decision-making.

"Talent strategy has to be driven by business needs, not by the GCC construct. Data, technology, and AI are now foundational skills for all roles, supported by operational excellence and deep domain understanding."

MR. PAWAN SACHDEV
Managing Director - Digital and Health Services,
Carelon Global Solutions India

Rapid Technological Adoption & Digital Maturity

The last decade witnessed aggressive adoption of frontier technologies across Indian GCCs. Capabilities in AI, machine learning, automation, cloud, data engineering, and cyber resilience have allowed centers to take on high impact responsibilities once limited to global headquarters. As GCCs increasingly lead digital transformation programs, they have evolved into innovation hubs capable of designing, owning, and scaling enterprise platforms and products. This technology maturity is a defining enabler of the shift toward 2026's decision center model.

"We don't adopt technology because it's fashionable—we adopt it only when it clearly improves profitability and business outcomes. We had an LLM in production four years ago, but our belief remains simple: well applied, simpler AI often creates more value than complex models adopted for hype."

MR. SUSHANT BHUSHAN
Global Leader – Data & Analytics and India GCC Leaders, Circle K

Progressive Policy Environment & Government Support

India's policy ecosystem has played a pivotal role in accelerating GCC expansion. Incentives such as specialized IT/ITES policies, streamlined compliance frameworks, SEZ benefits, and state level GCC promotion initiatives have lowered entry barriers and encouraged long term investment. New policies promoting Tier II city development, digital infrastructure, and skilling have further broadened the operating landscape. As a result, GCCs today benefit from a supportive regulatory environment that nurtures innovation, operational resilience, and sustained capability building.

"Recent GCC policies have addressed several long standing gaps—from single window documentation and transparency to taxation benefits, subsidies, and infrastructure support—creating a more supportive environment for GCC growth."

MR. PARAS PARIIKKH
Country Head India, ACA Group

Enterprise Demand for Value, Agility & Global Resilience

Global organizations are re architecting their operating models to strengthen business continuity, accelerate digital programs, and centralize strategic capabilities. India's GCCs have emerged as the natural home for these mandates—offering scale, cost effectiveness, and the expertise needed to deliver measurable enterprise value. This shift in global priorities has elevated GCCs from auxiliary units to core levers of transformation, governance, and decision making.

"The operating model is globally integrated, with agile squads spanning India, the US, and Europe. India based leaders now manage global teams and own product and service leadership roles—signaling a shift from offshore execution to global decision making."

MR. DIPU GOPINATH
Director & Country Head, Merative India

Expansion into Tier II Talent Markets

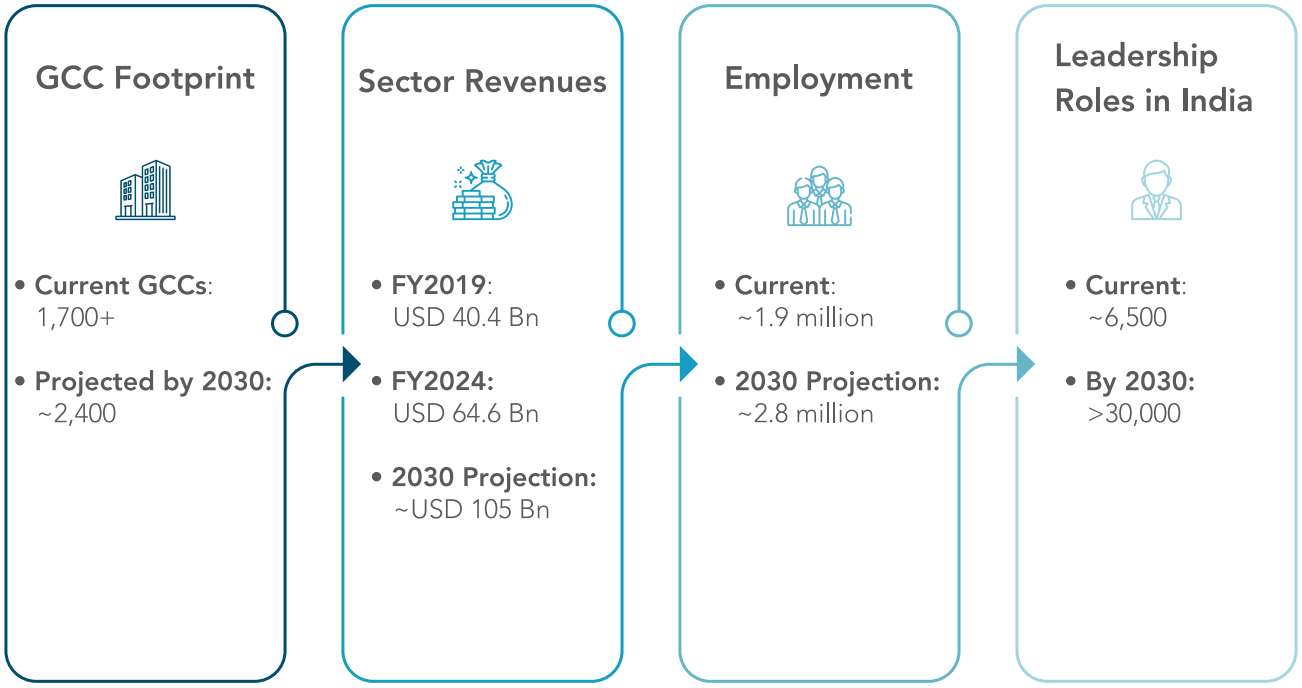
As enterprises confront global talent shortages, India's Tier II cities have become strategic destinations for GCC scale. Markets such as Coimbatore, Vadodara, Jaipur, and Kochi offer high quality talent with lower attrition and growing infrastructure strength. This geographic diversification supports long term sustainability while enabling GCCs to tap into new skill pools aligned with digital and engineering led growth.

"The future of GCC location strategy is talent centric, not city centric. Pan India hiring, remote work, and compensation parity allow access to diverse talent pools without being constrained by traditional Tier 1 boundaries."

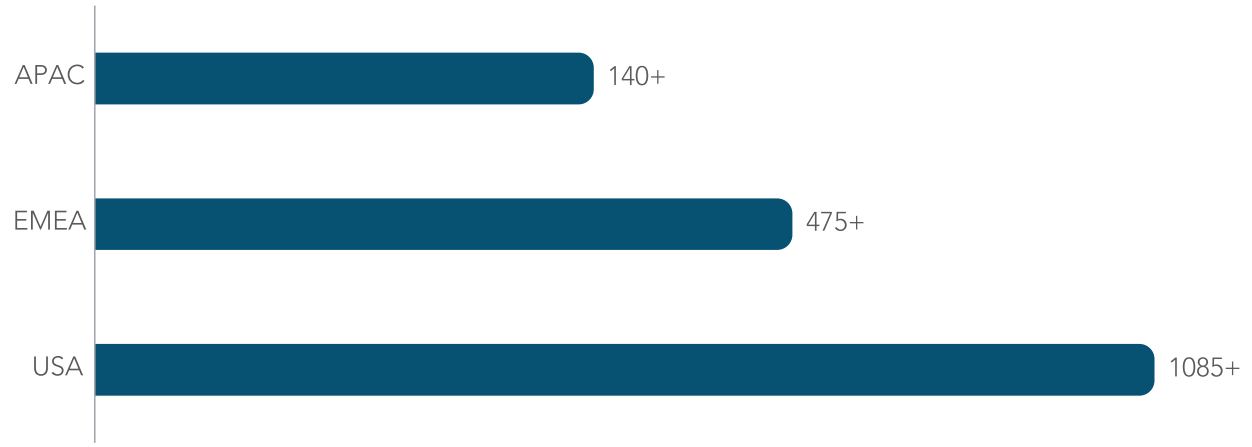
MR. DIPU GOPINATH
Director & Country Head, Merative India

The Current GCC Landscape in India

India's Global Capability Centres (GCCs) are undergoing a transformative shift—from traditional support functions to becoming pivotal strategic and decision-making hubs for global enterprises.



Region-wise Contribution of GCC in India



Source: Zinnov, AMCHAM India, Inductus Group, NASSCOM

India's Global Capability Center (GCC) ecosystem demonstrates a striking regional skew, reflecting the global corporate footprint and the industries that anchor their advanced functions in the country. The distribution—**over 1,085+ from the USA, 475+ from EMEA, and 140+ from APAC—**shows India's strong alignment with North American enterprise priorities and its rising relevance as a global transformation hub.

Dominance of US-headquartered GCCs

US-based corporations form the **largest contributor segment,** operating more than **1,085 GCCs** in India—by far the highest among all regions. This dominance is driven by:

- The scale and digital maturity of US enterprises
- Strong alignment between India's engineering/digital talent ecosystem and US innovation roadmaps
- Longstanding outsourcing/offshoring partnerships that have evolved into strategic in-house centers

Sectoral Strength: Aerospace, Defense, and Automotive

Approximately **50% of Aerospace & Defense (A&D)** and **Automotive GCCs** in India are US headquartered—a reflection of India's engineering depth, cost innovation, and proven capability in areas such as simulation, embedded systems, advanced manufacturing technologies, cybersecurity, and product lifecycle management.

Why India is indispensable to US enterprises

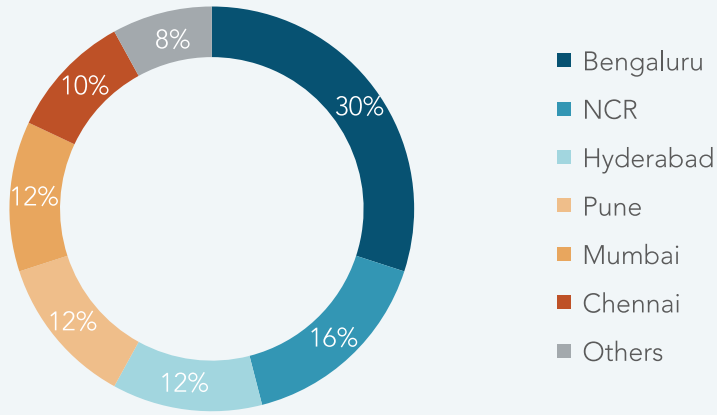
US-based companies leverage India not only for scale but for strategic advantages:

- **24/7 global operations** enabled by favorable time-zone overlaps
- **High-end digital and engineering talent** that complements US R&D teams
- **Cost efficiency at scale—**critical for functions spanning AI/ML, cloud, product engineering, risk analytics, and cybersecurity

- **Innovation velocity,** with India often acting as the first-build site for platforms and next-gen digital capabilities

Together, these factors position India as an **innovation-aligned extension of US headquarters,** rather than a conventional offshore location.

Share of GCC Units in India

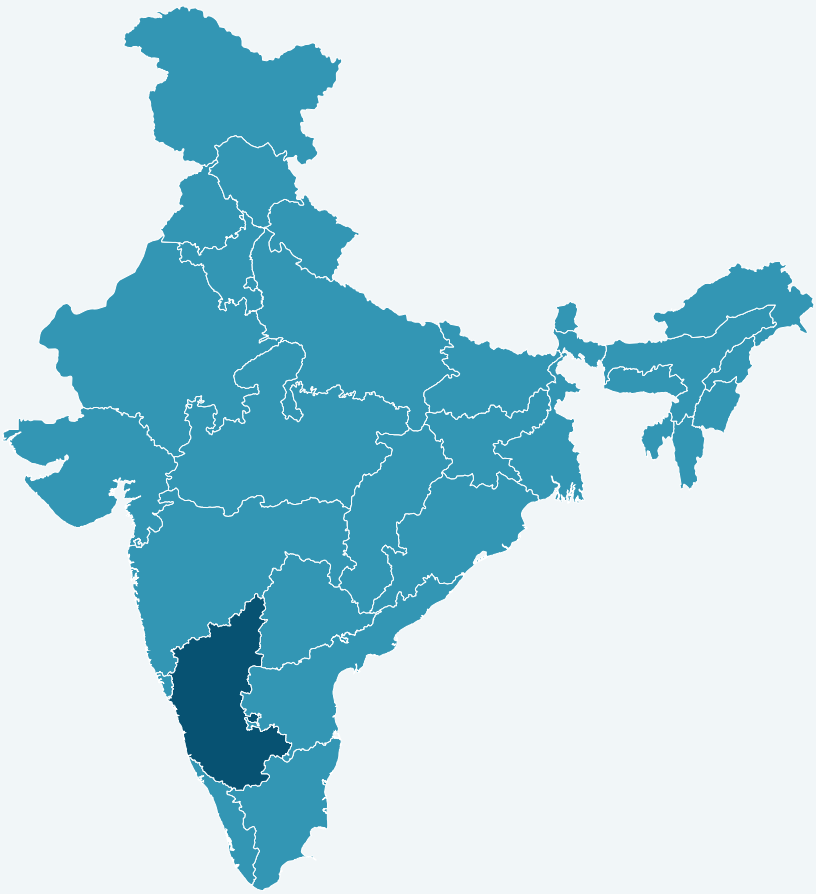


- **Bengaluru remains the top destination for GCCs,** contributing **30%** of India's total footprint, driven by its mature technology ecosystem, deep engineering talent, and a strong innovation network.
- **NCR accounts for 16%,** benefiting from proximity to regulatory institutions, diversified enterprise operations, and a rapidly expanding technology and analytics workforce.
- **Hyderabad, Pune, and Mumbai each hold a 12% share,** demonstrating **competitive parity** among these high growth clusters. Together, they provide a balanced mix of talent availability, operating cost efficiency, and robust infrastructure suited for digital, R&D, and enterprise functions.
- **Chennai contributes 10%,** supported by its strong engineering heritage, industrial base, and stable talent environment—making it a preferred location for global engineering, automotive, and shared service hubs.
- **Other emerging cities represent 8%,** led by locations such as **Coimbatore, Jaipur, Vadodara, and Kochi,** which offer rising talent pools, lower attrition, and increasing state level support.

Source: Zinnov, AMCHAM India

Karnataka: India's Leading GCC Growth Engine

Karnataka has emerged as a dominant force in India's Global Capability Centre (GCC) landscape, consistently outperforming national benchmarks across scale, talent, market size, and innovation depth. The state's contribution to India's GCC ecosystem is unmatched, supported by a strong technology base, vibrant startup culture, robust infrastructure, and forward looking government policies. Karnataka's performance relative to India's overall GCC growth underscores its role as the country's most mature and future ready GCC hub.



Where Karnataka Stands in the GCC Landscape

Description	India	Karnataka	Karnataka's Share
Number of GCC Units	2,975+	875+	~30%
GCC Talent Pool	1.9 million+	0.6 million+	~32%
GCC Market Size	USD 64.6 Bn	USD 22.2 Bn	~34%

Source: Karnataka Government GCC Policy for 2024-2029

Strategic and Economic Leadership

- Attracted **USD 51.03 billion** in FDI (2019–2024), making it one of India's top investment destinations.
- Hosts **18,000+ active startups,** the largest in the country.
- Bengaluru—known as the **Unicorn Capital of India—**houses **~40% of India's unicorns.**

Karnataka's Sector-wise Contributions to India:

IT / ITeS

- Contributes **42%** of India's total IT software exports.

Electronics

- **4th largest** contributor; responsible for **16%** of India's electronics exports.

Biotechnology

- Accounts for **20%** of India's bioeconomy, valued at **USD 31 billion in 2023.**

Automobiles

- **4th largest manufacturer,** contributing **8.5%** to national output.

Aerospace

- Responsible for **25%** of India's aircraft/spacecraft production.
- Contributes **65%** of India's aerospace exports.

Leasing & Infrastructure Leadership

- Bengaluru's commercial office stock grew from **100 million sq. ft. in 2013 to over 223 million sq. ft. by Q2 2024,** the largest among the top nine Indian cities.
- Office stock expected to increase **1.5× by 2030.**
- Bengaluru commands **41% of all GCC leasing** in India.

Key Policy Announcements Strengthening Karnataka's GCC Ecosystem

1. Establishment of Global Innovation Districts

- Three new technology parks to be developed**—one in Bengaluru, two Beyond Bengaluru.**
- High-speed connectivity, reliable power, and sustainable infrastructure aligned with global standards.
- Streamlined regulatory support with an R&D focused governance framework for GCC government engagement.

2. Strengthening Karnataka's AI Ecosystem

- New **Centre of Excellence (CoE) for AI** to be set up in Bengaluru.
- Built on a **triple-helix model** integrating industry, academia, and government.
- Focus on compute infrastructure, dataset curation, and ethical AI.
- Creation of an **AI Skilling Council** and an **INR 100 crore Innovation Fund** to support GCC–academia collaboration.

3. Expanding the GCC Footprint Across Karnataka

- Enhanced infrastructure in Beyond Bengaluru clusters, including airports, roads, and telecom connectivity.
- **Karnataka Digital Economy Mission (KDEM)** to provide targeted support for GCC expansion.

4. Dedicated Support Unit for GCCs

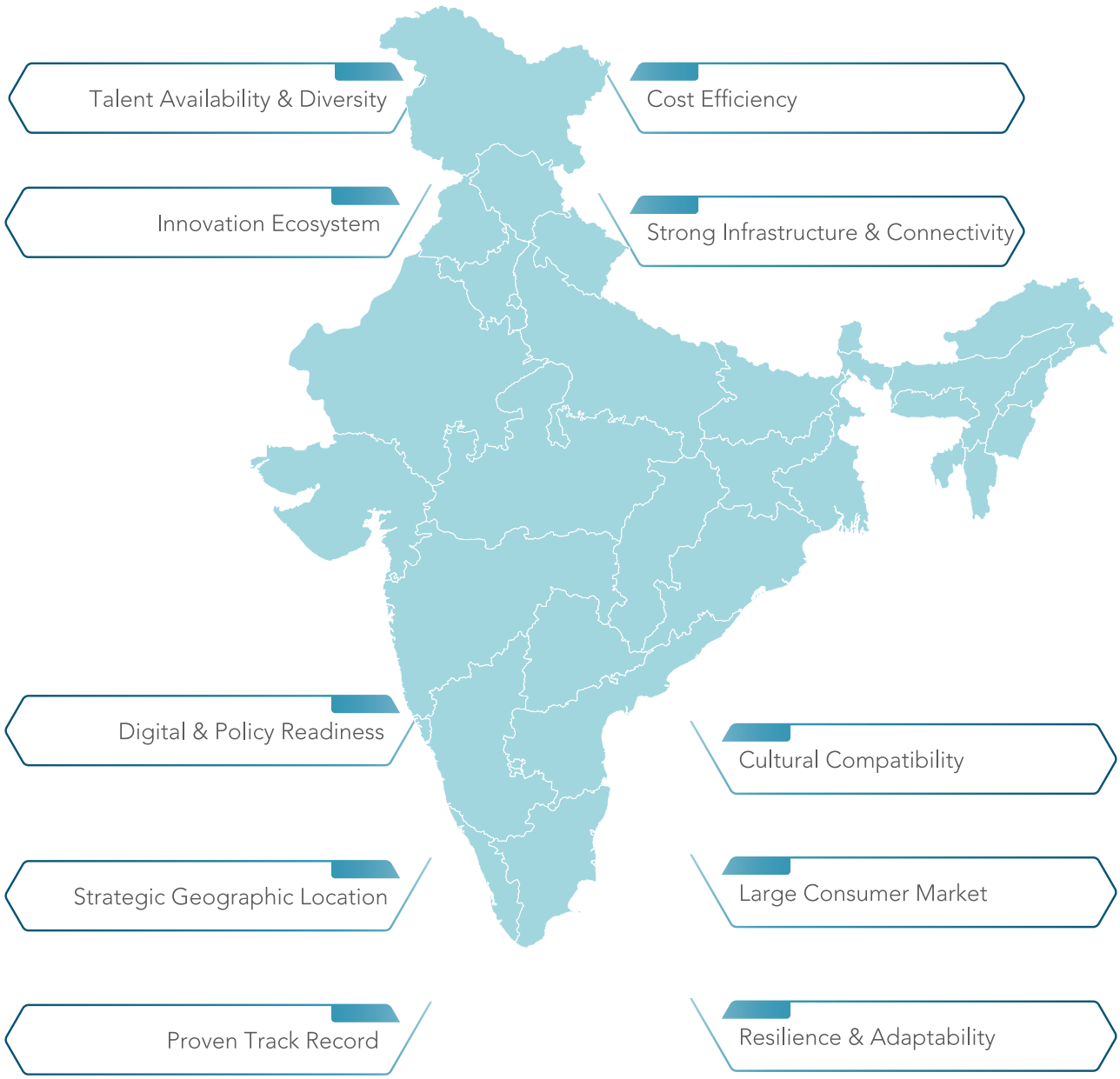
- Each GCC to receive a **Single Point of Contact (SPOC)** for end to end facilitation.
- A commercial **Real Estate Portal** will serve as a unified platform for available office spaces across Karnataka.
- Fast track approvals to be processed **within 45 days,** strengthening investor confidence and ease of doing business.

5. Engineering Research & Development (ER&D) as a Core Focus

- ER&D contributes **USD 34+ billion** to India's GCC market.
- Karnataka, already a national leader in ER&D, will receive heightened policy focus to deepen capabilities.

The India Edge: Why India Leads the GCC Revolution?

India has firmly established itself as the world's most competitive and future ready destination for Global Capability Centres (GCCs). With its deep talent pool, unmatched cost advantages, strong digital foundation, and thriving innovation ecosystem, India consistently delivers superior value to multinational enterprises. Today, the country is not only home to the highest number of GCCs globally but is also shaping the next generation of digital engineering, AI, R&D, and technology-led global operations.



Source: Inductus Group, Secondary Research

Talent Advantage: Scale, Skills & Diversity

- One of the world's largest pools of engineers, data scientists, technologists, and finance professionals.
- Diversity across domains enables end-to-end capability build-out in a single location.
- 40–60% cost advantage over developed markets due to skilled yet cost-effective workforce. markets.

Cost Leadership & Operational Efficiency

- India offers 40–70% savings in GCC operating costs across talent, infrastructure, and support functions.
- Tier-2 and tier-3 cities (Jaipur, Pune, Hyderabad, Coimbatore) further reduce real estate and utility costs.

Deep Innovation & Startup Ecosystem

- India's thriving startup landscape fuels innovation in AI, ML, blockchain, cybersecurity, and platform engineering.
- Strong collaboration between universities, R&D centres, and industry accelerates product and IP development.

Modern Infrastructure & Connectivity

- World-class tech parks across major metros—Bengaluru, Hyderabad, Pune, Noida.
- Rapid improvement in digital infrastructure enabling seamless global collaboration.

Progressive Policies & Digital-First Governance

- Initiatives like Digital India have strengthened digital public infrastructure.
- States such as Karnataka, Telangana, and Uttar Pradesh have pioneered GCC-friendly policies including:
  - Single-window clearances
  - Incentives on R&D, skilling, and employment
  - Support for new-age technologies

Cultural Alignment & Language Advantage

- Strong English proficiency simplifies global operations.
- Indian teams are highly adaptable to multicultural, cross-border work environments.

Strategic Geographic Advantage

- Time-zone overlap with Europe and APAC enables 24×7 global operations.
- Ideal base to serve fast-growing markets across Asia, Middle East, and Africa.

Proven Delivery Excellence

- India hosts 1,800+ GCCs, supporting the world's biggest brands across technology, banking, retail, pharma, auto, and aerospace.
- GCCs in India contribute USD 64.6 billion, projected to cross USD 100 billion by 2030.

Access to a Large & Evolving Consumer Market

- India's growing domestic market enables GCCs to test, localise, and scale new products and digital platforms.
- Proximity to high-growth regional markets accelerates innovation and customer insights.

High Resilience & Operational Continuity

- India's GCCs demonstrated exceptional crisis-readiness through seamless remote and hybrid work adoption.
- Strong IT backbone ensures continuity even in complex operational environments.

What's Next for GCCs: Trends, Challenges and the Path Forward

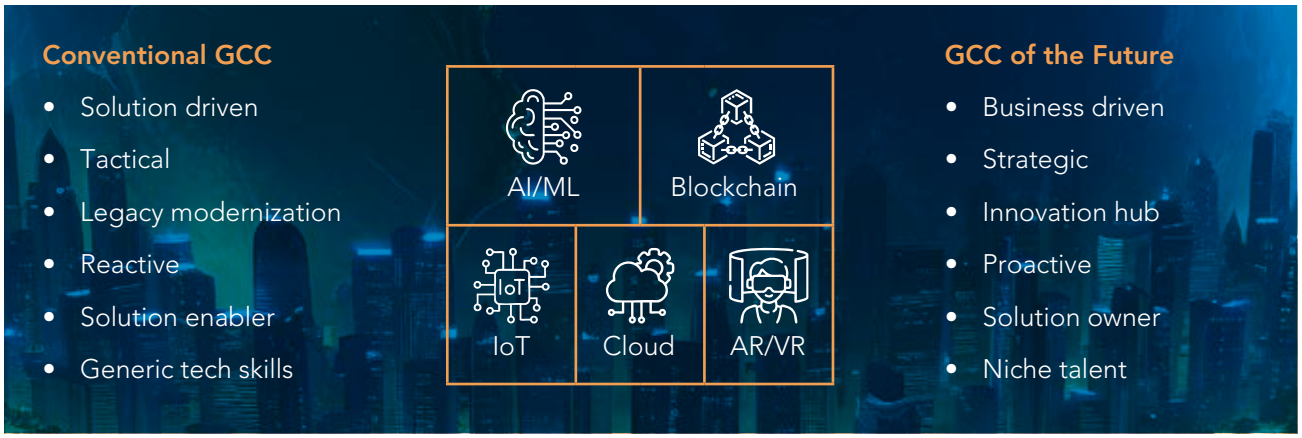
India's Global Capability Centres (GCCs) are transitioning from traditional, cost-driven delivery hubs into globally integrated engines for digital transformation, product innovation, and enterprise decision support. Over the coming years, GCCs will play a significantly expanded role in shaping organisational competitiveness as technology maturity, talent evolution, and policy momentum converge.

EMERGING TRENDS DRIVING THE NEXT WAVE OF GCC EVOLUTION

Digital Mandates Becoming Core to GCC Operating Models

GCCs are increasingly positioned as **strategic digital accelerators** for their parent organisations. Technologies such as **AI/ML, GenAI, IoT, cloud, blockchain, and AR/VR** are enabling centres to shift from **reactive service delivery to proactive value creation.** GCCs are now leading initiatives in predictive modelling, AI-enabled product design, cloud-native architecture, and automated business workflows.

This evolution is also redefining operating models—from legacy-oriented, execution-focused structures to agile, innovation-led constructs with deeper accountability.



To support this transition, GCCs are significantly accelerating digital adoption across three core areas:

Elevating Innovation

- AI-driven drug discovery
- Predictive analytics
- Cloud-native architectures

Enhancing User Experience

- Immersive AR/VR-led prototyping
- Personalised multi-channel retail experiences

Optimizing Transaction Delivery

- Automation & RPA for speed
- Workflow digitisation to free teams for high-value work

Tier-2 City Expansion

- Rising workforce concentration and growing operational costs in Tier-1 cities are pushing companies to expand into Tier-2 locations.
- Cities like Jaipur, Kochi, Visakhapatnam and Vadodara offer strong cost arbitrage, growing university ecosystems, and increased government infrastructure support.
- State-backed incentives (subsidies, fast-track approvals, concessional leases) are accelerating GCC expansions into these emerging hubs.

Workforce Upskilling and Reskilling

Source: Dun & Bradstreet Research

- GCCs are prioritising leadership and managerial capability development, making it the most invested talent initiative as centres prepare teams for higher-order strategic roles.
- Significant focus is being placed on AI-driven learning and development platforms and digital cross-skilling, enabling employees to build technology-adjacent and multi-domain competencies.
- Organisations are strengthening career mobility pathways, combining structured role rotations and targeted development tracks to deepen internal growth opportunities.
- DEI-linked skilling initiatives are gaining momentum, expanding access to training, mentorship and capability-building for diverse employee groups.

Sustainability & ESG Integration

- GCCs are embedding ESG commitments into their operational blueprints through energy-optimised campuses, cloud-first infrastructure, green buildings, and renewable energy usage.
- Social impact initiatives — skilling youth, expanding diversity hiring, community partnerships — are becoming structured components of GCC mandates.
- Sustainability is also emerging as a factor in location strategy, with organisations evaluating carbon impact and resource consumption across sites.

Cross-Industry Collaboration

- GCCs increasingly serve as multi-disciplinary innovation ecosystems where insights from tech, healthcare, automotive, retail, and BFSI intersect.
- Such collaboration enables faster productisation, cross-domain learning, and innovative solutions—such as AI-driven diagnostics, supply-chain visualisation platforms, and advanced predictive tools.
- These collaborations also accelerate adoption of digital platforms across industries.

Remote & Hybrid Work Models

- Hybrid models have become institutionalised, allowing GCCs to expand talent access beyond physical office catchment areas.
- Organisations are redesigning workforce policies, performance systems, and IT infrastructure to support permanent hybrid operations.
- Hybrid models have also become a critical element of talent retention and employer branding.

Government Support & Policy Shifts

- India's policy environment for GCCs is strengthening through state-driven incentives and central digital infrastructure programs.
- Karnataka's dedicated GCC policy, UP's incentives for large-scale job creation, and Maharashtra's forthcoming GCC roadmap highlight a nationwide push to attract global centres.
- Combined with SEZ support, Digital India initiatives, national skilling missions, and pro-investment frameworks, India's policy ecosystem is becoming increasingly GCC-friendly.

CHALLENGES & RISKS RESHAPING GCCS

Despite rapid growth and transformation, GCCs are navigating a complex set of challenges that threaten their scalability, innovation capacity, and operational resilience. These issues span talent dynamics, regulatory hurdles, cybersecurity, and infrastructure bottlenecks.

Talent Shortage & Retention

- The high demand for niche digital talent is outstripping supply, driving up hiring competition and compensation levels.
- Retaining AI, ML, cybersecurity and cloud specialists has become increasingly difficult.
- Tier-2 markets face early-stage skill ecosystems, increasing onboarding and training overheads.

Cybersecurity & Data Privacy Risks

Source: Inductus Group

- GCCs face elevated exposure to threats such as ransomware, phishing, data leaks, insider breaches, IoT vulnerabilities, and cloud misconfigurations — your threat-level chart captures these patterns.
- As remote work expands, organisations must strengthen zero-trust security, endpoint controls, threat analytics, and awareness programs.
- Compliance demands under DPDPA 2023 and global regulations (GDPR/CCPA) add operational complexity.

Regulatory & Compliance Complexity

- Global GCCs must manage layered compliance obligations spanning international data laws, India's digital regulations, and state-specific tax frameworks.
- Complex approval processes and divergent state rules can slow expansion and increase administrative overhead.

Economic & Geopolitical Uncertainty

- Global slowdowns, geopolitical tensions, supply chain disruptions, and currency volatility create uncertainty for GCC budgets and long-term planning.
- GCCs must factor macro risks into footprint strategy, vendor management, and capability roadmaps.

Policy Pulse – Understanding India's GCC Policy Environment

India has developed a layered policy ecosystem—spanning both state and central governments—to accelerate the expansion of Global Capability Centres and strengthen the country's positioning as a global operations and innovation hub. These policies are designed to streamline regulatory processes, incentivize investment, and support long-term talent and infrastructure development needed for GCC scalability.

Central Government Initiatives

- **Special Economic Zones (SEZs)** continue to provide GCCs with tax benefits and simplified compliance pathways, making India a cost efficient operational base.
- **Digital India** initiatives are expanding digital infrastructure, enabling seamless connectivity and technology adoption across GCC operations.
- **Skill India** targets training **400 million+ individuals,** supporting the talent pipeline required for digitally advanced GCCs.
- **Make in India** promotes technology driven industry growth, thereby creating a favourable ecosystem for high value GCC activities.

Progressive State-Level Policies

- Karnataka's dedicated GCC Policy (2024) aims to add **500 new GCCs by 2029,** offering incentives such as rental support, skilling reimbursements, and innovation lab funding to reinforce the state's leadership as India's most mature GCC hub.
- Uttar Pradesh's draft GCC policy provides **100% stamp duty exemption and payroll subsidies** with the ambition to attract **1,000+ GCCs** and generate **500,000+ jobs,** positioning the state as a fast emerging alternative GCC corridor.
- Maharashtra's GCC Policy 2025 targets **400 new GCCs and 400,000 skilled jobs,** backed by cluster based development, next gen GCC parks, innovation districts, talent programs, and a wide suite of fiscal incentives including rental assistance, payroll support, and capital subsidies

India's dual policy architecture — combining supportive national initiatives with targeted state-level incentives — continues to reinforce the country's standing as the world's most preferred hub for global capability centres.

Future Outlook & Strategic Recommendations

To maintain growth momentum and enhance their strategic relevance, GCCs must adopt forward-looking strategies that strengthen capabilities, safeguard operations, and position centres for long-term value creation. This requires coordinated action from leaders, policymakers, and enterprises.

Accelerate workforce capability development by institutionalising continuous upskilling, expanding digital learning, and embedding flexible work models to retain and grow specialised talent.

Establish Centres of Excellence to drive leadership in AI, quantum computing, cybersecurity, product engineering, and other next-generation technologies.

Reinforce cybersecurity and compliance, investing in advanced security frameworks and aligning with global regulatory standards such as GDPR and CCPA.

Diversify operational footprints across geographies—both within and outside India—to mitigate geopolitical, regulatory, and economic risks and ensure stronger business continuity

Embed sustainability and ESG priorities into governance structures by adopting green infrastructure, tracking ESG metrics, and committing to inclusive, responsible business practices

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