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The GCC NEWS *Digest*

Your Monthly
Brief on Global
Capability
Centres



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COVER STORY

FROM BACK OFFICE TO GLOBAL BRAIN: HOW NEW AGE GCCS ARE SHOCKING THE WORLD!

For decades, India's Global Capability Centres (GCCs) were the quiet, reliable engines of corporate empires, handling the grunt work of finance and IT with quiet efficiency. BUT NO MORE! A revolution is underway, and it's being led by a new breed of agile, innovation-first companies.

These aren't just support teams; they're the new strategic powerhouses, building products, driving R&D, and making their parent companies millions in revenue!

New data reveals a monumental shift: a shocking 40-50% of India's 1,900 GCCs are now focused on high-stakes R&D, AI, and product engineering.

This isn't just about cutting costs anymore; it's about a full-frontal assault on the global value chain. The game has changed, and India is no longer a follower—it's the new frontrunner.



ON THE COVER TODAY

KYNDRYL BETS BIG!

Tech powerhouse

Kyndryl has made a bold, three-year, \$2.25 billion commitment to its India operations.



Martin Schroeter
Chairman and CEO, Kyndryl.

SAP LABS

OPENS MEGA-CAMPUS!

In a massive show of confidence, SAP Labs has doubled down on Bengaluru with a new €194 million Innovation Park.



EDITORIAL

THE NEW VANGUARD



Welcome to the new era

of global business. For years, the conversation about GCCs was stuck in the past, a stale debate about cost savings and outsourcing. But we, at Inductus, have been watching the winds of change. We have seen a quiet revolution unfold, driven not by the lumbering giants of the past, but by a new vanguard of strategic, agile players.

The Indian GCC is no longer a simple cost-saving unit; it has become a central engine for enterprise value creation, a hub for high-value functions, and a crucial partner in the execution of global corporate strategy. This is a profound shift in trust and responsibility. The parent organizations are now entrusting their Indian GCCs with mission-critical functions like product ownership, research and development (R&D), and cybersecurity.



capabilities in-house, rather than with a third-party vendor, is a telling sign of a company's long-term conviction. It's a vote of confidence that India's talent and ecosystem are not just cost-effective but are truly strategic, indispensable assets.

The old world is crumbling. A new, more intelligent era of globalization is upon us, and it is being built right here in India. This publication will be your guide, your lens, into this new reality.





The ECOSYSTEM

A NEW MERIDIAN

THE QUIET RISE OF THE MID-MARKET: THE INNOVATION ENGINES

SHOCKING NEW DATA!
A new breed of corporate raiders is on the rise, and they're changing the game forever!

Mid-market companies, those with a turnover of \$100 million to \$5 billion, are now the fastest-growing segment in India's GCC space. In just the last two years, over 45 new mid-market centers have been established, making up a staggering 35% of all new setups.

The secret to their success? They're not just supporting operations; they're becoming "market-makers". These agile warriors operate with a "start-up DNA," complete with Chief Innovation Officers and internal venture capital models.



This isn't a myth, it's a fact! Companies like Bloomreach are using their India GCCs to develop new AI-driven personalization and search products that are now core revenue streams for the company globally! ThoughtSpot's India GCC is a prime example of this "fail-fast" mindset, developing standalone modules that were so successful they were integrated into the main product suite.



This is a power shift. The old-guard GCCs were built for scale. These new players are built for speed and innovation, and their strategic approach is redefining the entire ecosystem.

Characteristic	Mid-Market GCCs	Traditional, Large GCCs
DNA	Start-up mindset; empowered to experiment and fail fast	Process-oriented; focused on scaling established operations efficiently
Focus	Innovation-led; end-to-end product ownership; generates IP and revenue	Cost-centric to value-add; primarily supports global operations
Governance	Decentralized governance; flat hierarchies; autonomy for local teams	Centralized control; defined reporting structures to headquarters
Talent & Skills	High concentration of niche, deep-tech skills (AI, ML)	Broad talent pool across multiple functions (IT, F&A, HR)

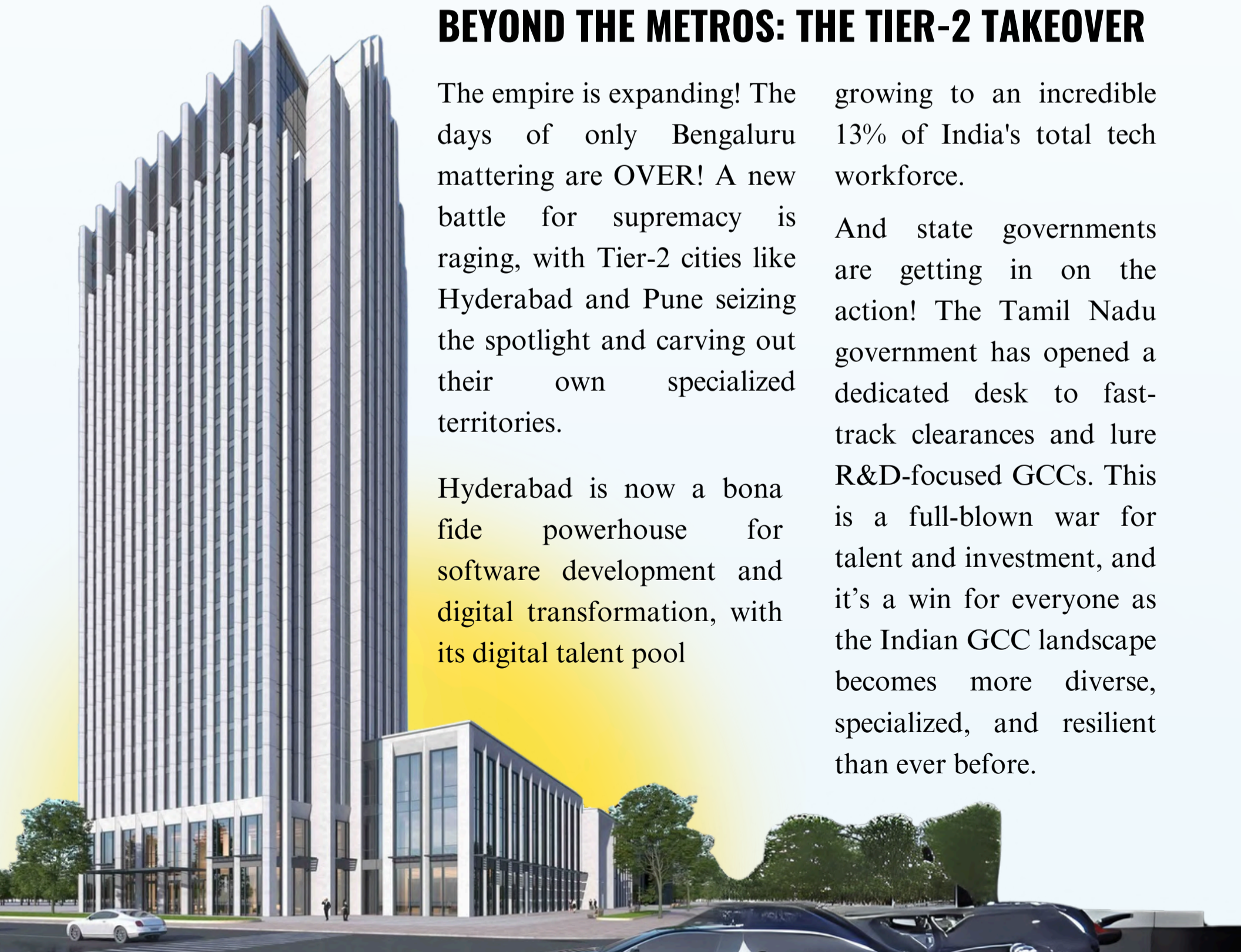
BEYOND THE METROS: THE TIER-2 TAKEOVER

The empire is expanding! The days of only Bengaluru mattering are OVER! A new battle for supremacy is raging, with Tier-2 cities like Hyderabad and Pune seizing the spotlight and carving out their own specialized territories.

Hyderabad is now a bona fide powerhouse for software development and digital transformation, with its digital talent pool

growing to an incredible 13% of India's total tech workforce.

And state governments are getting in on the action! The Tamil Nadu government has opened a dedicated desk to fast-track clearances and lure R&D-focused GCCs. This is a full-blown war for talent and investment, and it's a win for everyone as the Indian GCC landscape becomes more diverse, specialized, and resilient than ever before.



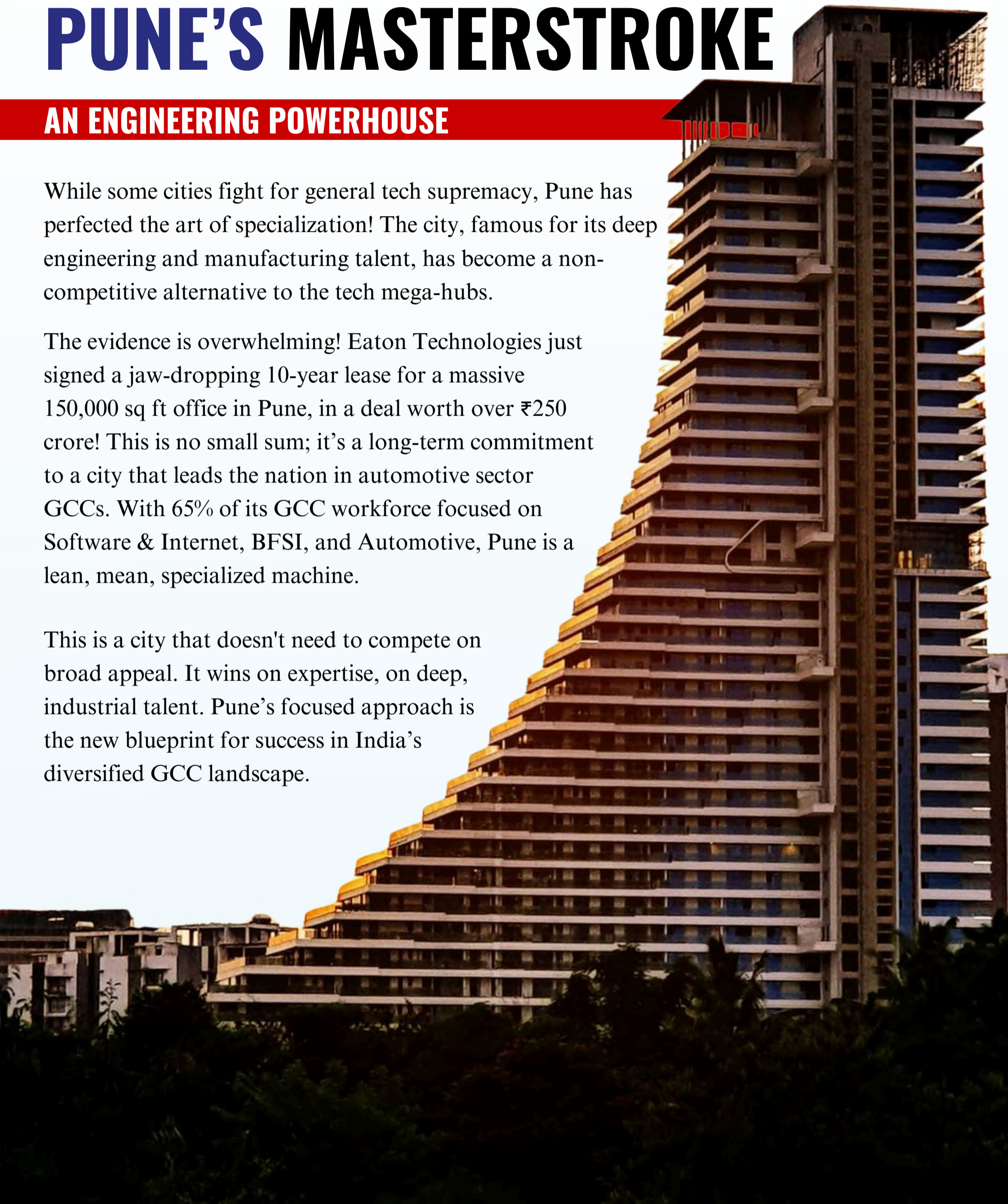
PUNE'S MASTERSTROKE

AN ENGINEERING POWERHOUSE

While some cities fight for general tech supremacy, Pune has perfected the art of specialization! The city, famous for its deep engineering and manufacturing talent, has become a non-competitive alternative to the tech mega-hubs.

The evidence is overwhelming! Eaton Technologies just signed a jaw-dropping 10-year lease for a massive 150,000 sq ft office in Pune, in a deal worth over ₹250 crore! This is no small sum; it's a long-term commitment to a city that leads the nation in automotive sector GCCs. With 65% of its GCC workforce focused on Software & Internet, BFSI, and Automotive, Pune is a lean, mean, specialized machine.

This is a city that doesn't need to compete on broad appeal. It wins on expertise, on deep, industrial talent. Pune's focused approach is the new blueprint for success in India's diversified GCC landscape.



IN THE NEWS

PULSE OF THE MARKET

KYNDRYL'S BILLION-DOLLAR BET!

Tech giant Kyndryl has committed a staggering \$2.25 billion over three years to fuel its India operations, with a laser focus on AI innovation and talent development.

TAMIL NADU'S BOLD PLAY!

The state government is set to create a dedicated desk to fast-track clearances for R&D-focused GCCs, hoping to lure global firms to Chennai with its deep talent pool and stable ecosystem.

EATON'S MASSIVE LEASE!

Eaton Technologies has signed a blockbuster 10-year lease in Pune, a move valued at over ₹250 crore, cementing the city's position as a powerhouse for engineering and automotive GCCs.



NEW SETUPS

BUILDING THE FUTURE

Hyderabad

THE AI AND FINANCIAL POWERHOUSE

- **ELI LILLY & COMPANY:** The American pharma giant has opened a new 2.2 lakh sq ft innovation hub to leverage India's talent in AI and data sciences to fast-track its global drug development pipeline.
- **DEUTSCHE BÖRSE GROUP:** The German stock exchange operator has opened a new Global Capability Centre to drive its long-term digital agenda with a focus on AI-powered analytics and cybersecurity.

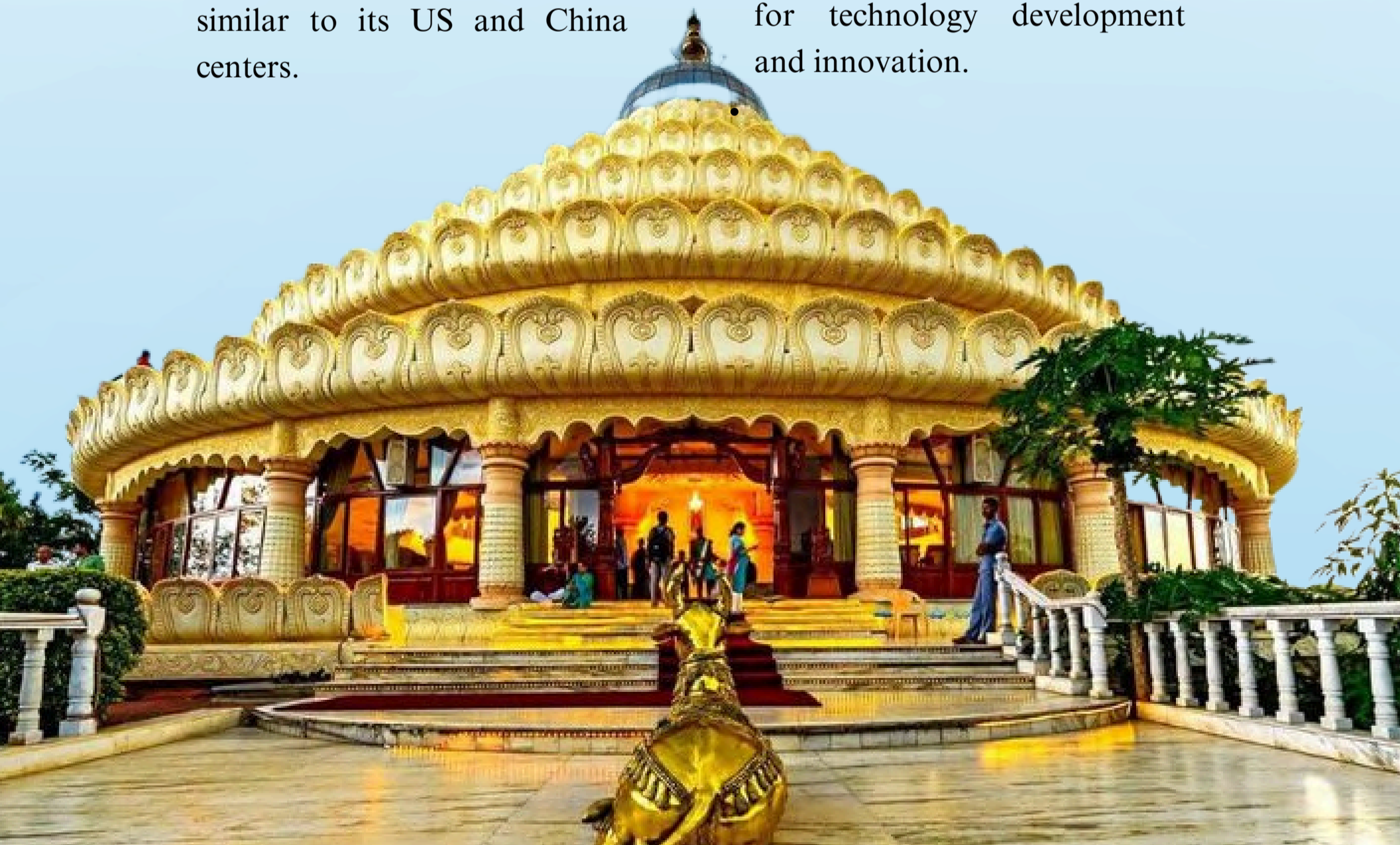
- **ZS:** The management consulting and technology firm has opened a new Hyderabad office to deliver end-to-end GCC offerings to its global clients, positioning the center as a hub for high-impact solutions.



Bengaluru

THE TECH AND R&D CAPITAL

- **SAP LABS:** In a major statement of intent, SAP Labs has unveiled a new €194 million Innovation Park that will house up to 15,000 professionals, reinforcing Bengaluru's dominance in R&D.
- **EBAY:** The e-commerce titan has launched a new Global Capability Centre, choosing Bengaluru for its "world-class" talent and positioning it as a strategic innovation hub, similar to its US and China centers.
- **CATALYST BRANDS:** Born from the merger of JCPenney and SPARC Group, this retail powerhouse has officially launched its India operations in Bengaluru, ready to shape the future of a multi-brand retail ecosystem.
- **AVAILITY:** The US health information network has expanded its Bengaluru facility, signaling a clear evolution from product support to a new hub for technology development and innovation.





Inductus **GCC** Service Models

India's Leading GCC Enabler

BOT (Build-Operate-Transfer)

A structured pathway to establishing your GCC with minimized risk and maximum efficiency. We **build** and **operationalize** your center, ensuring seamless performance before **transferring full ownership** to you—**equipping your business with a mature, self-sustaining capability**.

COPO (Company-Owned, Partner-Operated)

Maintain **full ownership** while leveraging Inductus' operational expertise. This model enables you to establish a GCC with **absolute control over intellectual assets (IP), agility, and scalability** while we manage day-to-day operations, **ensuring zero liability, compliance, and maximum efficiency**.

Additionally, a **Zero Capex Model** with **Digital Twin** or a **Mirror Like Operational Structure** with superior process excellence.

FLEXI (Adaptive & Custom GCC Solutions)

Beyond predefined structures, **Flexi** is a **bespoke model offering absolute customization and adaptability**.

It molds itself around your unique business prerequisites, evolving seamlessly with your vision. **This isn't just a service—it's an agile, high-impact partnership crafted to maximize your success.**

Proud recipient of **Times Power Icons Award**
for being one of the **Leading GCC Enabler of India**

Presented by

THE TIMES OF INDIA



Inductus ensures that each model is executed with precision, innovation, and strategic foresight—helping you unlock the full potential of your GCC in India.

Our deep expertise in GCCs, coupled with a strong network of industry partnerships and policy-level advisory, positions us as a trusted partner for driving transformational outcomes.

Certificate of Excellence for Consulting & Advisory Services
by **Chicago Open University USA**





COPO & Digital Twin Integrated Service Model

A study based proposition to build a global standard GCC mechanism for Large & Mid-sized Corporations



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"In a world full of rapid tech & process disruptions, global corporations that invest in innovation-led R&D don't just survive—they lead. Innovation is the key to staying relevant, cost-competitive, and future-ready in an ever-evolving marketplace..."

— Alouk Kumar - CEO, Inductus —

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Inductus GCC's Digital Twin and COPO (Company-Owned, Partner-Operated) Service Model creates a seamless, future-ready operational framework for global businesses setting up GCCs in India. The Digital Twin Process ensures real-time collaboration, decision-making, and operational efficiency by replicating physical systems in a virtual environment, enabling synchronized execution across multiple time zones. Meanwhile, the COPO Model allows MNCs to retain full ownership and strategic control while leveraging Inductus' expertise for execution, compliance, and scalability.

This hybrid approach optimizes costs, mitigates risks, and accelerates GCC growth, ensuring innovation-driven operations with minimal liabilities and maximum efficiency.



Designed to be Different.

