

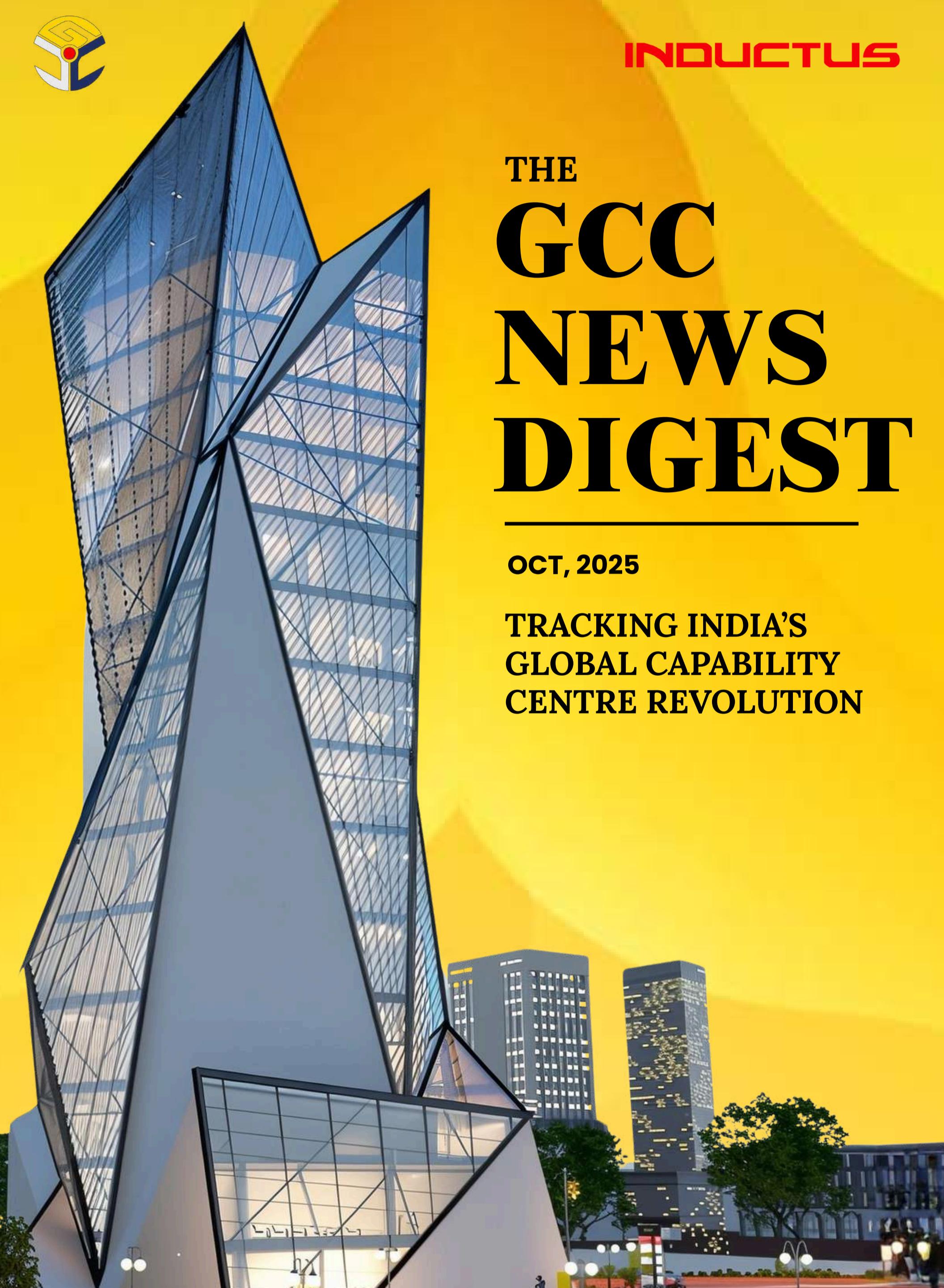


INDUCTUS

THE GCC NEWS DIGEST

OCT, 2025

TRACKING INDIA'S
GLOBAL CAPABILITY
CENTRE REVOLUTION



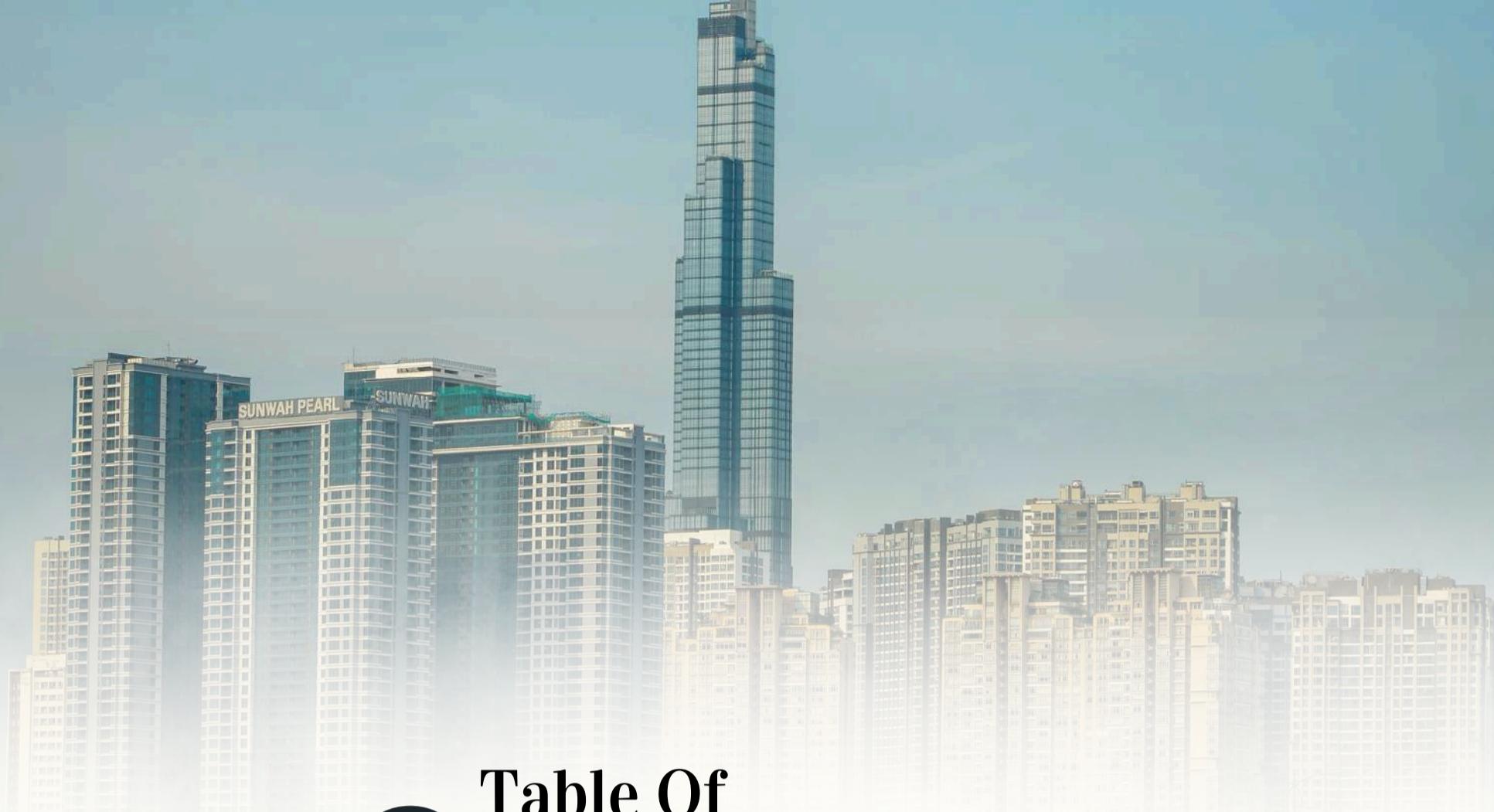


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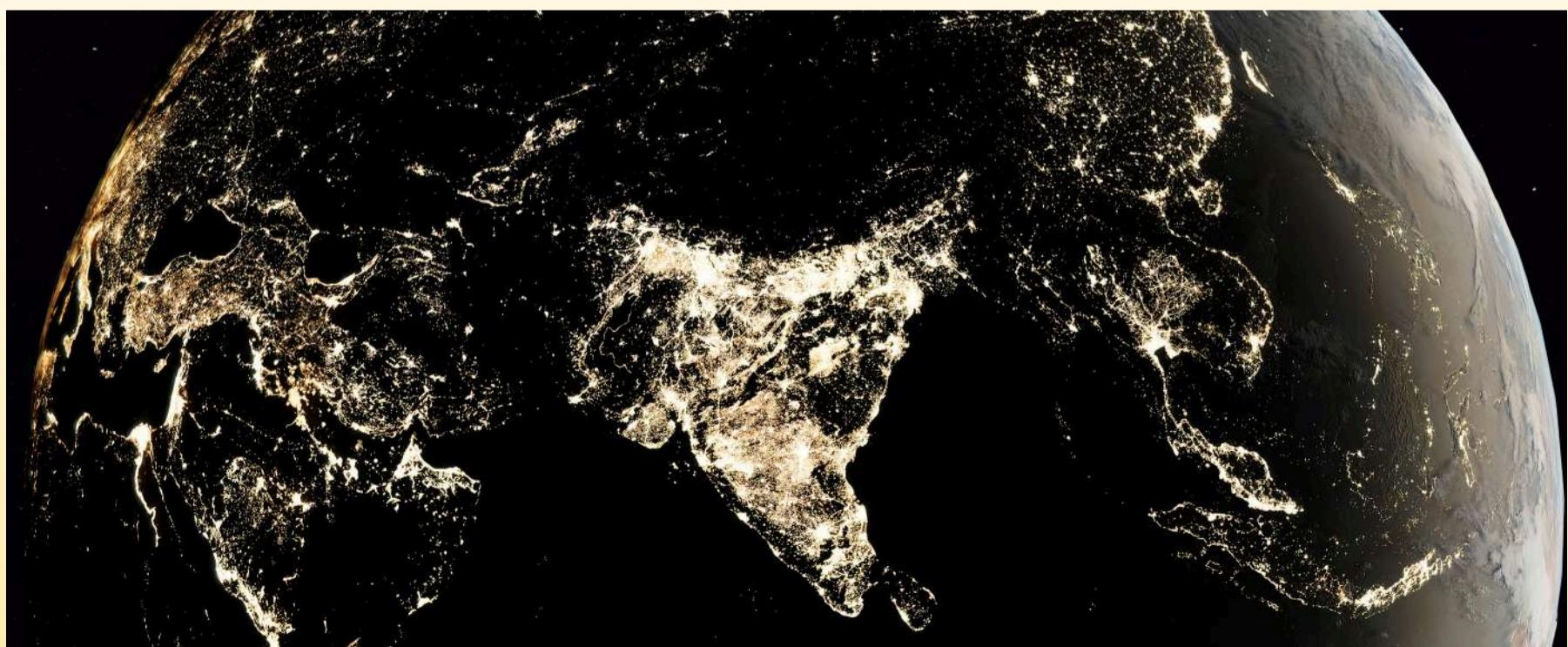
TRENDS

INDIA'S GCC BOOM POWERS THE NEXT ECONOMIC WAVE

India's Global Capability Centres (GCCs) are undergoing a major shift, moving beyond traditional support roles to become **key drivers of global innovation** in areas like AI, cybersecurity, and product development. This new "**GCC 3.0**" phase is attracting core R&D and digital strategy functions to India.

Forecasts indicate massive growth: the number of GCCs will jump from 1,800 to **over 3,500 by 2030**, contributing to **\$110 billion-plus in revenue** and creating over 3.5 million jobs. This expansion is directly fueling a significant increase in demand for office space, with an estimated **50–55 million sq. ft.** needed by 2030. The real estate growth will be concentrated in major cities (Bengaluru, Pune, etc.), but is quickly spreading to emerging Tier-2 markets.

This rapid upswing, however, is deeply reliant on a parallel **talent transformation**. The shift to GCC 3.0 has exponentially raised the demand for **specialized, future-ready skills** in the Indian workforce, moving beyond sheer volume to focus on depth of expertise. As these centers evolve into global innovation hubs, they are competing fiercely for professionals in niche areas like Generative AI Engineering, MLOps, Cloud Architecture, and advanced Cybersecurity. Consequently, this has triggered massive investment in corporate skilling programs, internal talent academies, and strong partnerships with academia, underscoring that the **sustainability of the GCC boom hinges directly on India's capacity to continuously reskill and upskill its vast talent pool** for these high-value strategic functions.



INDIA — THE NEW HOME FOR GLOBAL TALENT

With the U.S. tightening H-1B visa rules and Europe facing tech skill shortages, global firms are accelerating talent development in India. The country's massive STEM talent base and cost-to-skill advantage have made it the natural hub for digital-first roles in engineering, design, and analytics.

"GCCs are uniquely positioned for this moment," said Rohan Lobo. "Companies are realizing that India is not just about cost savings — it's about competitive advantage."

Sectors such as banking, insurance, healthcare, defense, automotive, and retail are all using Indian GCCs to design and test next-gen products.

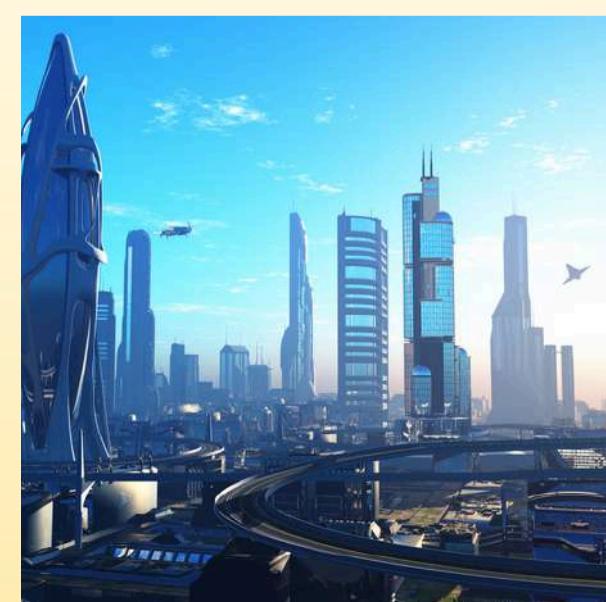


ELEVATING TO INNOVATION AND R&D HUBS

This transition signifies a major evolution for India's GCC ecosystem. Having moved beyond basic IT and back-office services, these centers are now establishing themselves as strategic innovation and Research & Development (R&D) hubs. Multinational corporations are increasingly entrusting their Indian GCCs with end-to-end product ownership, developing core Intellectual Property (IP), and creating solutions in cutting-edge domains like Artificial Intelligence (AI), Machine Learning, and cybersecurity. This shift is transforming India's role from a service delivery location to a co-creation partner that drives the parent company's global product roadmaps and technological differentiation.

THE \$110 BILLION FUTURE

The acceleration of the GCC model is expected to unlock immense economic potential. Industry reports project that the Indian GCC market size will surpass \$110 billion by 2030, with the workforce growing to over 3.5 million professionals. This growth is also expanding beyond traditional metropolitan cities like Bengaluru and Hyderabad, with companies setting up centers in Tier-2 cities to tap into new pools of talent and operational benefits. By becoming the "digital brain" for global enterprises, India's GCCs are cementing their strategic relevance, influencing C-suite decisions, and positioning the country as an indispensable pillar of the global digital economy.



WORKPLACE DESIGN — THE HIDDEN ENABLER OF PERFORMANCE

Today's GCCs are more than just offices; they are collaboration ecosystems. Workplace design across India is being reimagined with hybrid work models, innovation labs, green spaces, and digital infrastructure to attract top talent.



Experts say that design-driven work environments are now directly linked to employee retention and innovation outcomes. With India housing over 1,800 GCCs today, the push for modern, sustainable campuses is reshaping corporate real estate. By 2030, this number could exceed 3,500 centers, contributing almost 1% to the national GDP.

Prioritizing Wellness and Hyper-Collaboration

The newest GCC facilities prioritize **employee well-being** and **psychological safety** as core design mandates. This means moving beyond just adding aesthetic elements to intentionally incorporating features that reduce stress and encourage unplanned, high-value interactions. Design now emphasizes flexible furniture layouts, on-demand meeting pods, and large, sunlit social hubs that blend work with leisure. Crucially, the integration of **smart building technologies**—from occupancy sensors to personalized climate control—allows the physical space to adapt instantly to the hybrid workforce, ensuring that every employee, whether on-site or remote, feels equally



engaged and supported in a **hyper-collaborative** environment.

A Catalyst for Tier-2 City Growth

The demand for high-quality, modern workspaces is accelerating the development of commercial real estate in emerging markets. As GCCs expand into Tier-2 cities like Pune, Kochi, and Jaipur to access broader talent pools, they are driving the construction of Grade-A, environmentally certified office spaces. This investment is not just about buildings; it's a multiplier effect on local economies, creating demand for sophisticated urban infrastructure, hospitality, and residential development. By setting a new gold standard for corporate campuses in these cities, GCCs are effectively decentralizing economic growth and establishing new, state-of-the-art tech corridors across India.

IN NEWS

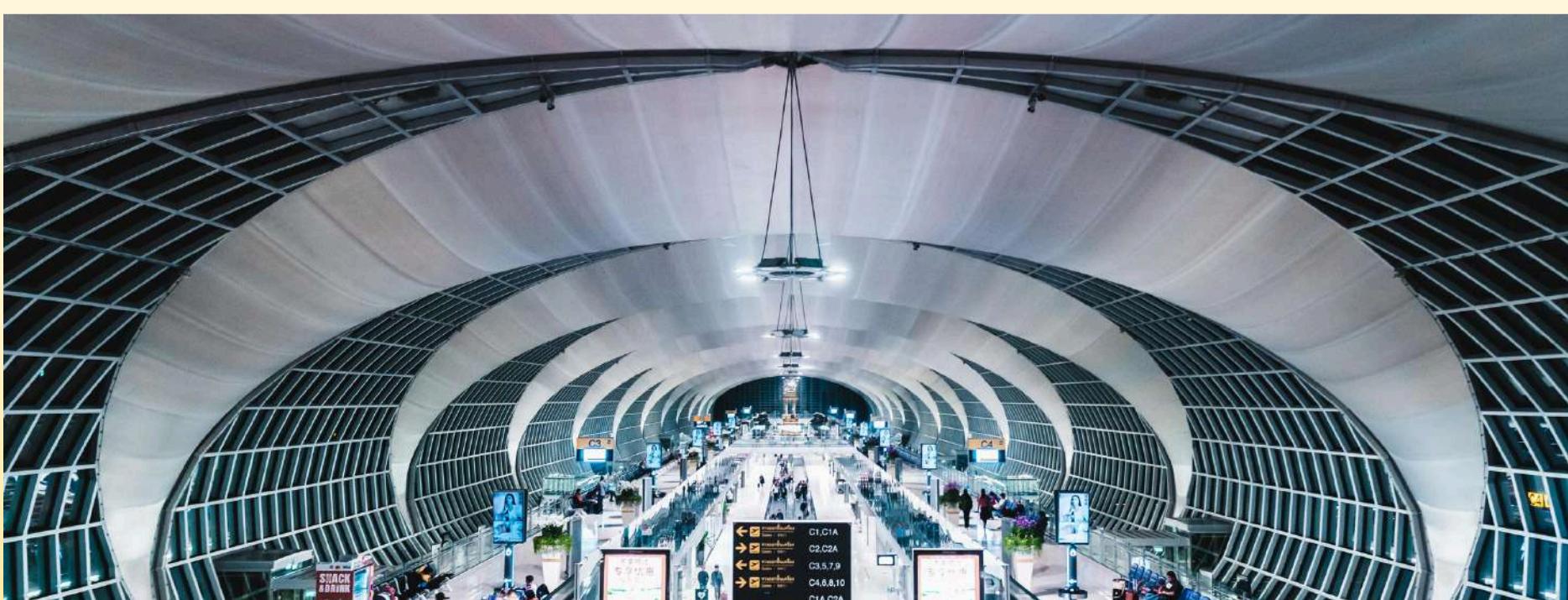
CHEVRON TO INVEST \$1 BILLION IN BENGALURU TECH HUB

Global energy major Chevron is making a long-term bet on India with a \$1 billion investment to expand its Global Capability Centre (GCC) over the next six years. The Bengaluru hub, already home to over 1,000 engineers, is set to become a nerve center for Chevron's global operations, focusing on AI, automation, and digital twins.

"This is not just about scale – it's about redefining how we deliver energy using technology,"

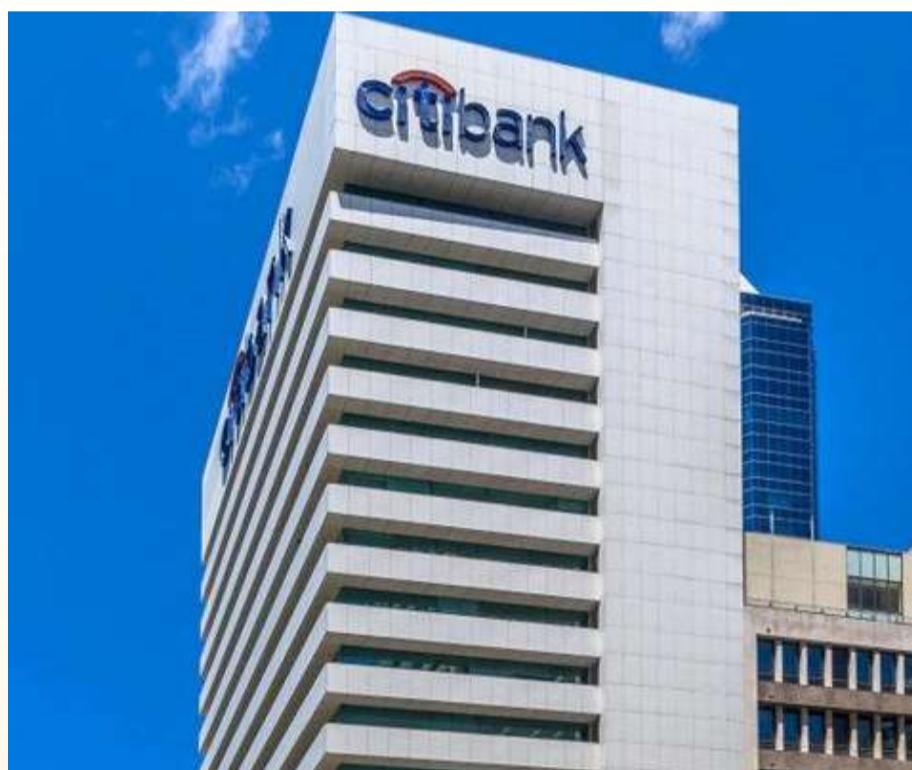
said Akshay Sahni, Country Head, Chevron India. The move reflects how even traditional industries like oil and gas are embracing India's digital depth.

The Bengaluru center, named the Chevron Engineering and Innovation Excellence Center (ENGINE), is slated to become the company's largest technology hub outside the United States, signaling a deep reliance on India's specialized talent. Its mandate extends to high-end, complex engineering work, including geotechnical analysis, advanced process monitoring, and the creation of digital twins of massive facilities such as refineries and LNG plants to enhance operational reliability and safety. Beyond traditional oil and gas applications, this hub will be instrumental in advancing Chevron's lower-carbon future initiatives, such as leveraging AI to identify optimal subsurface reservoirs for Carbon Capture and Sequestration (CCS) projects globally, and in directly embedding India's capabilities at the core of the energy transition.



CITI INDIA BECOMES SECOND-LARGEST GLOBAL WORKFORCE HUB

Citi bank India is now set to become the bank's second-largest workforce globally, following the sale of its Mexico arm, Banamex. The country houses 33,000 professionals in its Citi Service Center (CSC) network, serving critical global functions across risk, analytics, operations, and technology.



"Our India teams are at the center of our transformation agenda,"

said K Balasubramanian,

said **K Balasubramanian, CEO, Citi India Subcontinent.** Citi's journey underlines India's evolution from a support market to a strategic value hub for the world's biggest financial institutions.

The growth of Citi's India hub is fundamentally driven by its transition into a FinTech and innovation engine. The 33,000-strong workforce is no longer focused merely on transaction processing but is tasked with developing core digital intellectual property (IP), particularly in Generative AI and advanced data analytics. India's professionals are now creating proprietary AI models for crucial global banking functions, including real-time fraud detection, streamlining complex regulatory compliance across multiple jurisdictions, and sophisticated risk modeling to predict market and credit exposures. This focus transforms the CSC network from an operational center to a strategic command post that is actively building the secure, digitally-enabled financial systems Citi will use worldwide to stay competitive and compliant.



MAHARASHTRA

Clears GCC Policy Target 400 Centers & 4 Lakh Jobs

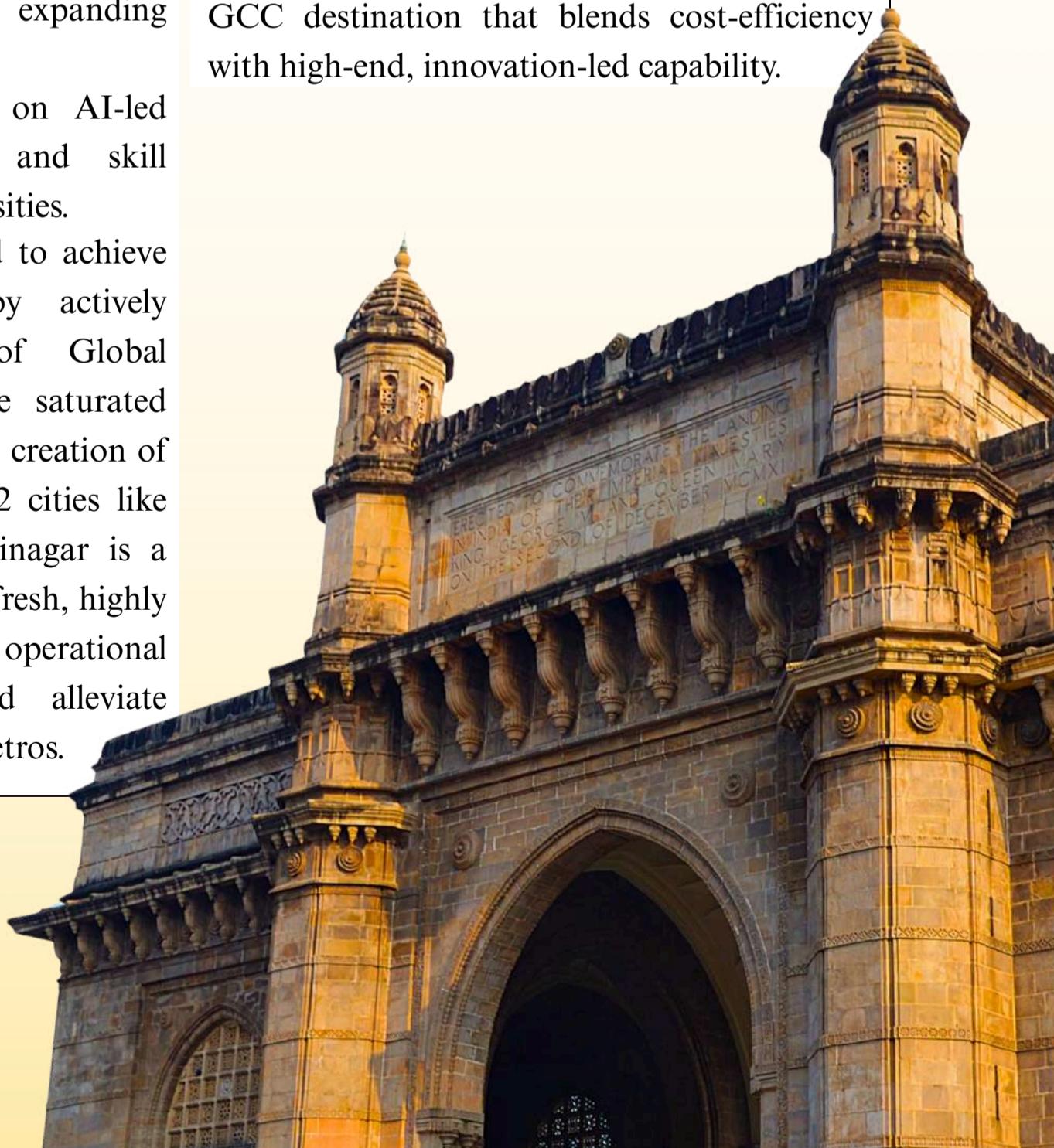
The Maharashtra Cabinet has approved a dedicated GCC Policy 2025, aiming to attract 400 new global centers and create over 400,000 high-skilled jobs by 2030. The policy includes capital subsidies up to ₹50 crore, single-window clearances, and the development of dedicated GCC Parks across Pune, Nagpur, Nashik, and Sambhaji nagar.

- ◆ The state is positioning itself as India's GCC Capital for Financial Services, with top BFSI and IT firms expanding operations.

- ◆ The policy also focuses on AI-led innovation, ESG adoption, and skill partnerships with leading universities.

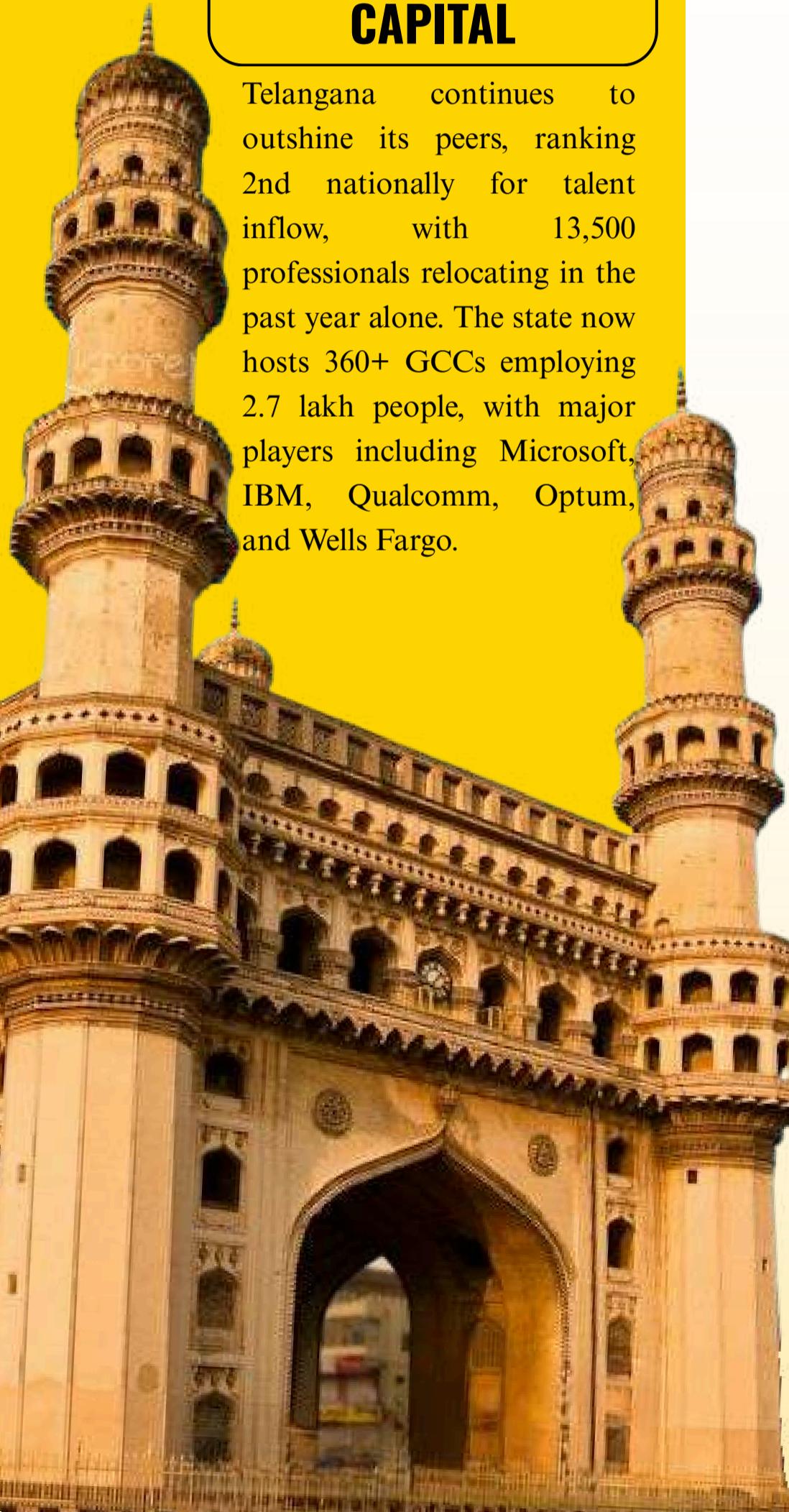
Crucially, the policy is designed to achieve balanced regional growth by actively promoting the expansion of Global Capability Centers beyond the saturated hubs of Mumbai and Pune. The creation of dedicated GCC Parks in Tier 2 cities like Nagpur, Nashik, and Sambhajinagar is a deliberate strategy to tap into a fresh, highly skilled local talent pool, reduce operational costs for multinationals, and alleviate infrastructure pressure on the metros.

This decentralization effort is backed by a mix of fiscal and non-fiscal incentives, including specific subsidies, R&D grants, and stamp duty and property tax exemptions, specifically to encourage enterprises to establish operations in these emerging economic centers. By integrating an industry-driven curriculum into local universities and offering internship support schemes, Maharashtra is ensuring a sustainable pipeline of workforce talent, solidifying its claim as a future-ready GCC destination that blends cost-efficiency with high-end, innovation-led capability.



TELANGANA

INDIA'S GCC TALENT CAPITAL



Telangana continues to outshine its peers, ranking 2nd nationally for talent inflow, with 13,500 professionals relocating in the past year alone. The state now hosts 360+ GCCs employing 2.7 lakh people, with major players including Microsoft, IBM, Qualcomm, Optum, and Wells Fargo.

"Telangana is firmly talent-positive and positioned to be India's digital capital,"

said Kamal Karanth, Co-founder, Xpheno. The government is now targeting 100 new GCC announcements in 2025, driven by Hyderabad's infrastructure and proactive policies.

The true measure of Telangana's success lies in the quality and complexity of the GCC mandates it attracts. Hyderabad is now witnessing a significant evolution from pure IT services to high-end Engineering R&D (ER&D), product innovation, and specialized domain expertise in areas like Banking, Financial Services, and Insurance (BFSI), and Life Sciences. This strategic maturity is underpinned by robust infrastructure, including world-class tech parks and reliable connectivity, and a unique focus on creating a supportive ecosystem. State initiatives, such as the Telangana Academy for Skill and Knowledge (TASK) and deep partnerships with academia and the thriving local startup community, ensure a constant pipeline of future-ready talent in niche fields like AI, Cybersecurity, and Quantum Computing. This collaborative model not only meets the immediate needs of global corporations but also accelerates their time-to-market for new products, cementing Hyderabad's role as a strategic global innovation hub, not just a center for operational efficiency.

NEW SETUPS

SATTVA GROUP & INNOVALUS LAUNCH 'GCCBASE' — A PLATFORM FOR GLOBAL ENTRY

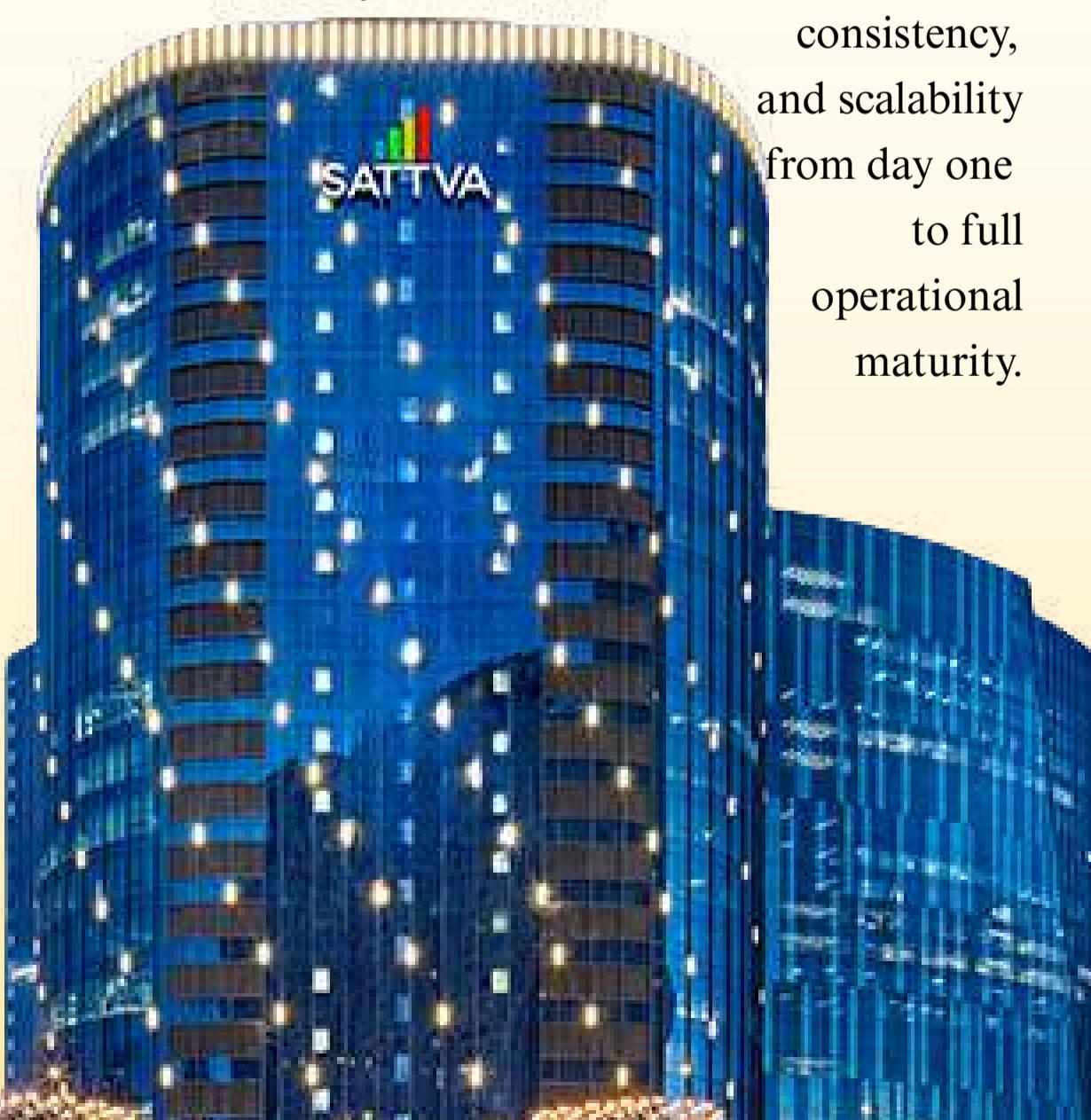
In a move to streamline India entry for global corporations, Sattva Group and Innovalus have launched GCCBase, a platform that provides end-to-end support for companies setting up GCCs in India. The offering combines real estate, compliance, staffing, and operations management, aiming to help companies go from concept to campus in record time.

"Our goal is to make India the easiest and fastest market to launch a GCC,"
said Vikram Reddy, COO, Sattva Group.

This unified platform integrates Grade-A real estate with pod-based GCC delivery and a data-driven governance layer, all packaged under a single contract and Service Level Agreement (SLA).

This integrated structure allows global corporations to deploy Vertical-Specific Micro-GCC Pods (teams of 20–75 FTEs in areas like Generative AI Design or Cybersecurity) that can be fully operational and compliant in a remarkable 90 days.

The model provides a seamless, graduated roadmap: as the client's operations expand, they can transition from a micro-GCC pod to a full-scale captive center without the friction of changing platforms or re-investing in new operational frameworks, ensuring speed, consistency, and scalability from day one to full operational maturity.



GCCBase addresses the fragmentation and complexity inherent in setting up a new center by debuting India's first "Space-to-Scale" model.



GLOBAL LOGIC EXPANDS IN CHENNAI

TARGETS 20K EMPLOYEES BY 2026

IT Minister P. Thiaga Rajan inaugurated GlobalLogic's new office at RMZ Milenia Park. The Hitachi-owned engineering firm plans to scale its India workforce to 20,000, focusing on AI-first, cloud-native, and telecom-grade software solutions. The expansion marks another milestone in Chennai's growing reputation as an AI and design engineering hub.

CRASHPLAN STRENGTHENS INDIA PRESENCE AFTER PARABLU ACQUISITION

U.S.-based CrashPlan, a leader in data protection and cloud backup solutions, has expanded its India operations after acquiring local cybersecurity firm Parablu. Under CEO Dan Beer, the company plans to double its Bengaluru GCC workforce by 2026, turning India into its global R&D anchor.

SOUTHWEST AIRLINES TO SET UP GLOBAL INNOVATION CENTER IN HYDERABAD U.S. carrier Southwest Airlines will establish its first Global Innovation Centre in Hyderabad, supporting the state's trillion-dollar vision and focusing on aviation technology, safety analytics, and digital transformation. The move follows high-level discussions between CM A. Revanth Reddy and CIO Lauren Woods.

INNOVATION OPENING FLAGSHIP FACILITY IN PUNE Digital engineering powerhouse Orion Innovation has launched a state-of-the-art development center in Pune, adding to its growing India presence across Mumbai, Chennai, Kochi, Coimbatore, and Hyderabad. The facility will focus on cloud modernization, AI, and data-driven platforms, serving global clients in BFSI, telecom, and healthcare.

"India remains central to our innovation roadmap"

said Raj Patil, CEO, Orion Innovation.



THE FINAL WORD

India's Global Capability Centre (GCC) landscape is experiencing a rapid, qualitative transformation, evolving from a cost-center back-office to the world's **Global Innovation Brain**. Driven by record investments like Chevron's, ambitious state policies (e.g., Maharashtra's policy revolution, Gujarat's CAPEX/OPEX subsidies, and Telangana's talent surge), and a shift toward high-value functions like **Generative AI research**, advanced R&D, and digital product engineering, the country now hosts over 1,800 GCCs. These centers are now treated as enterprise-wide **Centers of Excellence** (CoEs), moving away from simple service delivery to a strategic value-creation mandate, pioneering global products and advanced technological research. This evolution, supported by government incentives for expansion into Tier-2 cities and a focus on upskilling, is projected to result in India hosting **3,500 GCCs by 2030**, firmly establishing its GCC ecosystem as the undisputed Global Command Center.

India is not just participating in the global digital economy — it's leading it.



INDUCTUS RESEARCH OUTLOOK GCC LANDSCAPE 2025-2040

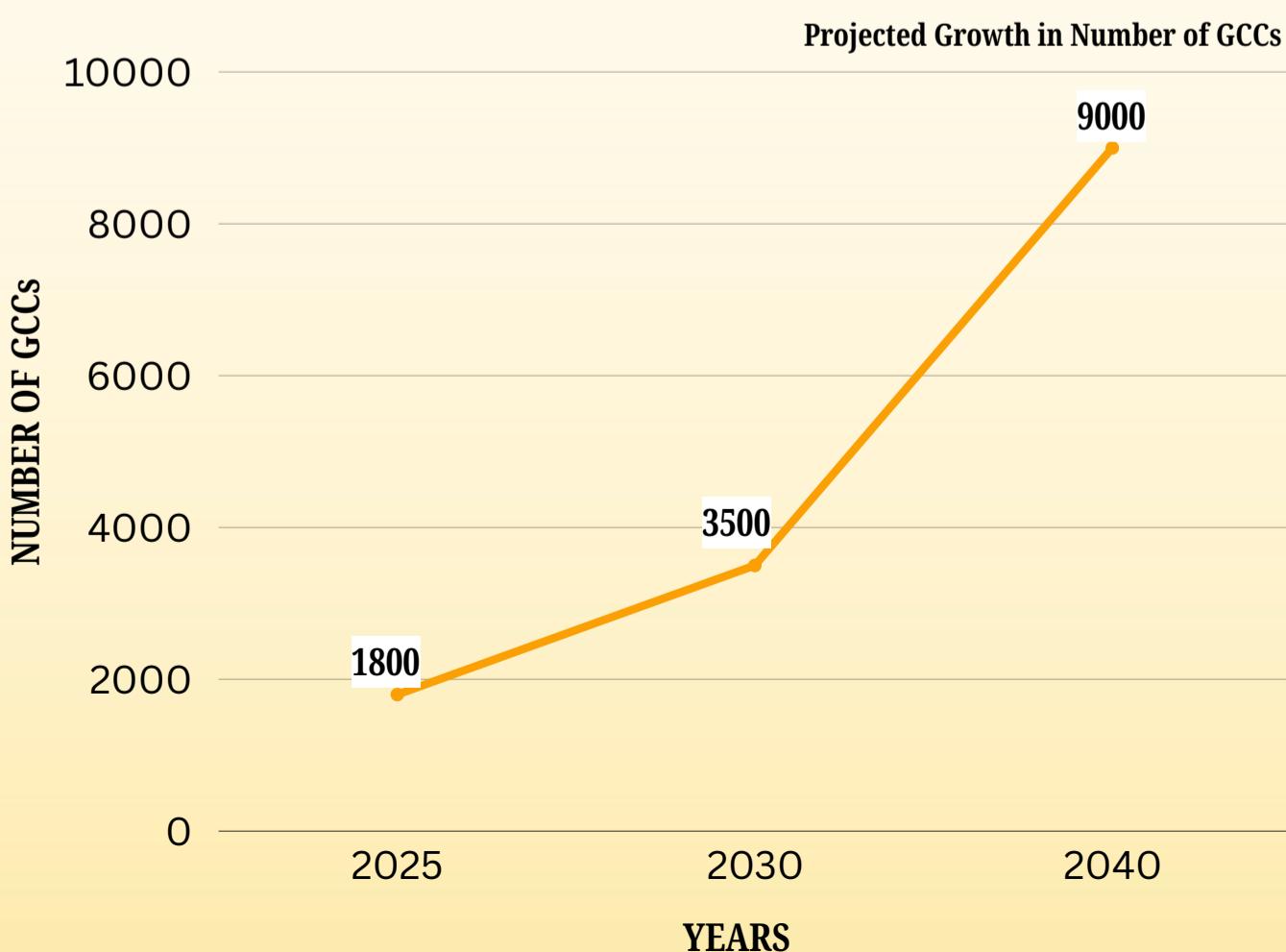
Decoding the Next-Phase Evolution of Global Capability Centres in India

GCC Growth Projection

The number of Global Capability Centres (GCCs) in India is projected to expand significantly from approximately **1,800 in 2025** to nearly **3,500 by 2030**, and further to around **9,000 by 2040**. By the next decade, GCCs are expected to function as strategic enterprise platforms, driving intellectual property creation, digital architecture evolution, and revenue-impacting business initiatives—positioning India as the **global hub for high-value capability development and innovation leadership**.

Key Drivers of This Expansion

- Mid-Market Dominance in New Set-Ups:** The establishment of newer GCCs will be led primarily by mid-market global organizations, seeking to strengthen competitiveness through capability acceleration
- Shift Toward Innovation-Led Value:** Organizations are leveraging India not only for cost optimization but for product engineering, data platforms, AI-led transformation, and innovation ownership.
- Access to Specialized, Scalable Talent:** India offers deep talent pools across digital, engineering, cybersecurity, and advanced analytics—enabling rapid capability build-out and scale.
- Mature Operating Ecosystem:** Proven governance practices, digital infrastructure readiness, and service-provider enablement significantly lower entry barriers and reduce time-to-value.



Economic Value Generated by GCCs (2025–2040)

2025 - ~USD 65 Billion

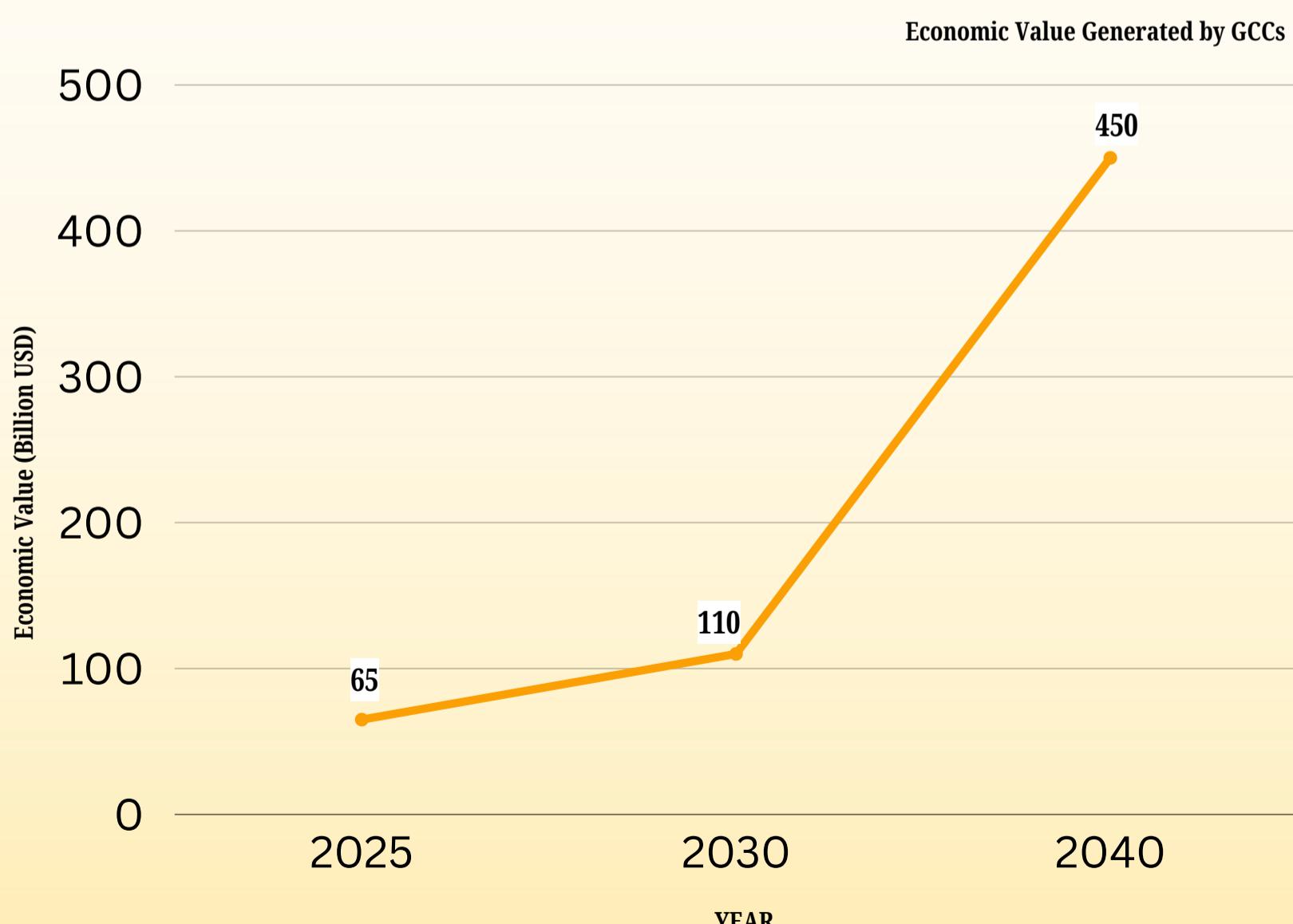
At this stage, GCCs primarily create value through **standardized digital operations, shared service delivery, and technology enablement**. The economic contribution is driven by **productivity efficiencies** and **optimized cost structures**, reflecting a stable but foundational phase of value creation.

2030 - ~USD 110 Billion

By 2030, the sector's value will expand as GCCs transition into higher-order functions, including product engineering, data platforms, cybersecurity, cloud modernization, and AI-led service models. The rise in value correlates with increased functional ownership, domain specialization, and tighter integration into enterprise-level decision workflows.

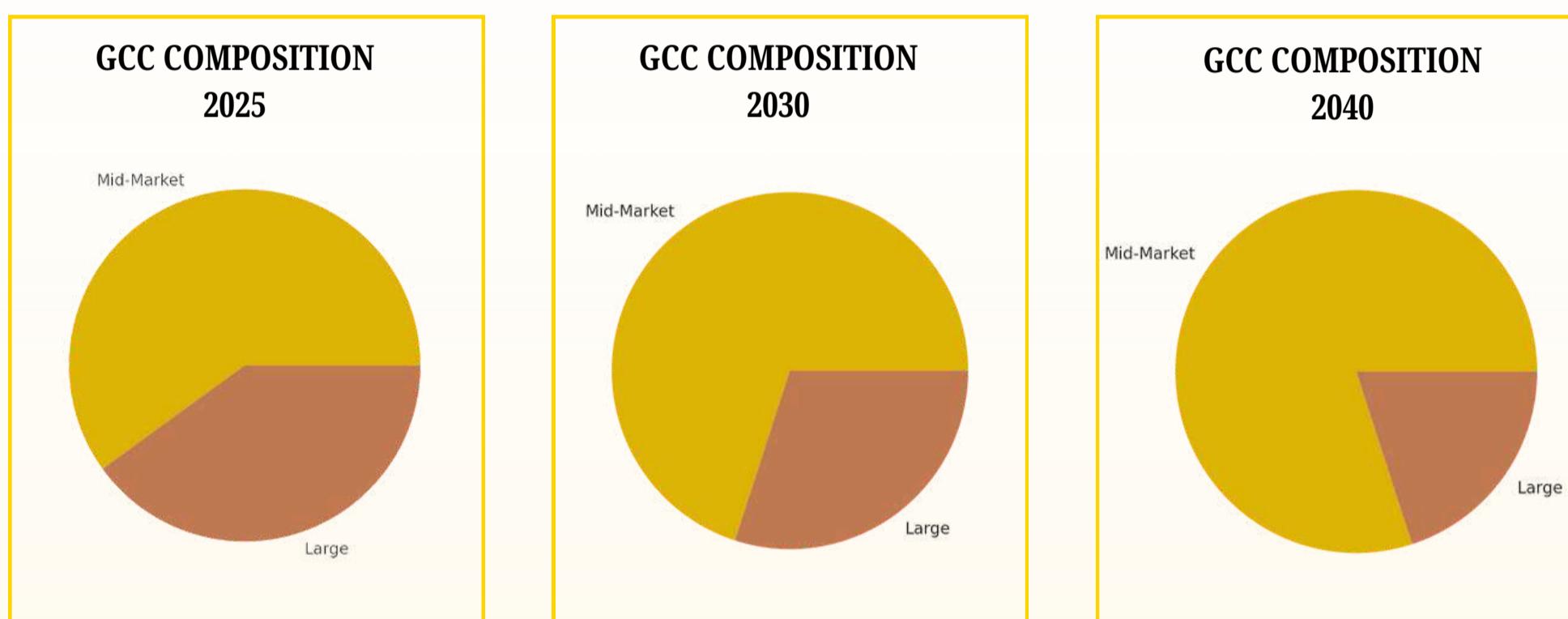
2040 - ~USD 450 Billion

By 2040, GCCs will evolve into strategic innovation engines, responsible for intellectual property development, enterprise platforms, analytics-driven business orchestration, and revenue-impacting initiatives. The economic contribution at this stage reflects deep capability maturity, ecosystem integration, and leadership-driven global responsibilities.



THE SHIFTING CENTRE OF GRAVITY: MID-MARKET GCCS TAKE THE LEAD

One of the most defining shifts in the global capability landscape is who is driving the growth. While earlier phases of GCC expansion were dominated by Fortune 500 and global conglomerates, the next wave is being led by mid-market enterprises, agile, innovation-hungry, and strategic about value creation.



- Mid-Market GCCs: 60%
- Large Corporation GCCs: 40%

Mid-Market Steps Forward

In 2025, 60% of GCCs are operated by mid-sized corporations.

This marks the early turning point — where organizations beyond the top global elite begin leveraging India as a strategic capability hub, not merely a cost advantage play.

- Mid-Market GCCs: 70%
- Large Corporation GCCs: 30%

The Balance Breaks

By 2030, mid-market GCCs will expand to 70% of the total footprint.

This is when the capability flywheel takes hold, and talent specialization, leadership depth, engineering culture, and domain excellence make India the default build location.

- Mid-Market GCCs: 80%
- Large Corporation GCCs: 20%

The New Global Normal

By 2040, 80% of all GCCs will belong to mid-sized organizations.

Narrative:

The GCC is no longer a “large corporation capability”. It is the innovation default for any company aiming to compete globally.

India has become:

Mid-market enterprises are scaling GCCs not just to save cost, but to stay market-relevant, accelerate innovation, and build resilient, future-ready operating models—driving their share significantly higher than large corporations over time.

- The capability capital of the world.
- The engineering headquarters for global mid-market firms.
- The hub where new digital and product DNA is built.

WHY MID-MARKET IS GROWING FASTER

NEEDS

- **AI-Led Disruption and Cost Optimization:**

As AI and automation reshape global operations, mid-sized companies face a stronger need to optimize costs while upgrading capabilities. Establishing GCCs allows them to reduce operating expenses without slowing innovation momentum.

- **Shift Toward Innovation-Led R&D:**

Mid-market firms increasingly require continuous product evolution, faster prototype cycles, and digital-first business models. GCCs in India provide access to innovation-ready talent and advanced engineering ecosystems.

- **Demand for Market-Aligned, Future-Skilled Talent:**

To remain competitive and relevant, these organizations must tap into specialized, scalable talent pools in product development, AI/ML, data science, cloud, cybersecurity, and platform engineering—capabilities now concentrated in India.





INDUCTUS

The

GLOBALGCC SUMMIT

21st November 2025
New Delhi, INDIA





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.



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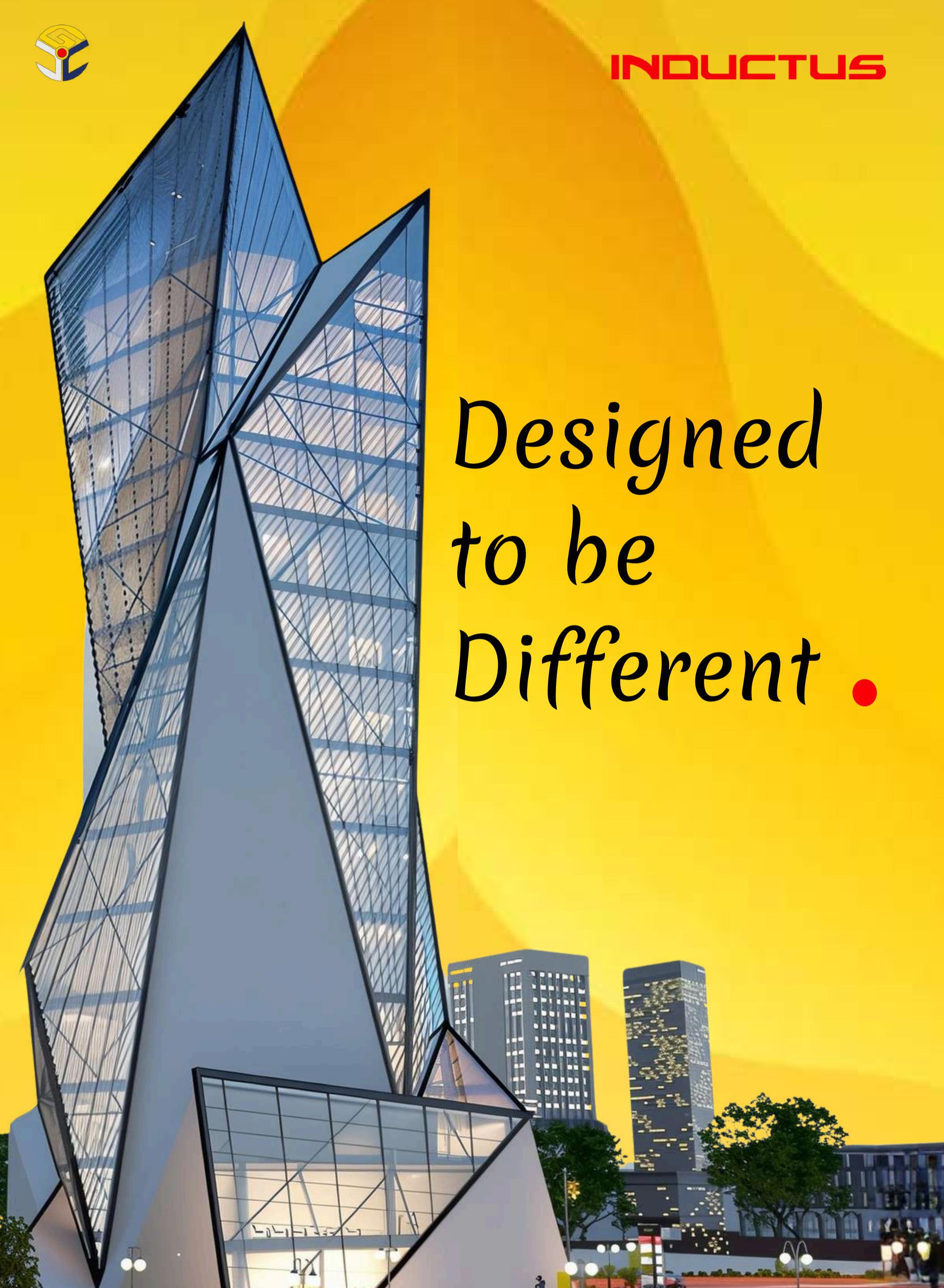
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