INDUCTUS

The GCC TIMES

The Great GCC Race
How Are India's States Rewriting the Rules to Win Global Investment?

June 2026

TABLE OF CONTENTS

03 Editor's Note

04 The Great GCC Race

05 The new era of subsidies: Haryana's GCC Policy 2026

07 UP's GCC Gambit

09 Pune's Counter Strike

11 Kerala's 200 GCC Ambition

13 The Policy Sorecard

14 What GCCs Actually Look for in 2026?

15 The Tier-II Incentive Stack

16 Who moved in, who expanded, what it signal?

17 June 2026 Events & Summits

19 Will India's State GCC Policies Converge or Diverge by 2030?

EDITOR'S NOTE

Most countries with a large GCC ecosystem have a single capital for it. The UK's GCC story is **London.** Poland's cities are **Kraków and Warsaw.** The Philippines is **Manila.** India alone has a structure of **eleven states** competing simultaneously for global investment that appears weak from the outside but, on closer examination, is one of its most durable structural advantages.

The interstate policy race that has intensified through 2025 and into mid-2026 is not merely a political spectacle. It is accelerating **infrastructure development, deepening talent pipelines in cities** that would have waited another decade for private capital, and creating genuine optionality for global enterprises seeking to diversify beyond Bengaluru and Hyderabad. No single state can dictate the pace of India's GCC growth. Each state's failure is another state's opportunity, and that competitive pressure, uncomfortable as it is for those on the losing side, is exactly what keeps India ahead of its rivals globally.

This edition is devoted entirely to that competition. We map the policies, the ambitions, the fine print, and the ground realities. We track who's winning in June 2026, who's gaining fast, and what the next 36 months will decide about India's GCC geography.

THE GREAT GCC RACE

For most of its two-decade run, India's GCC story was told through two cities. Bengaluru and Hyderabad dominated so completely that "setting up in India" and "setting up in one of those two" had become near-synonymous. Then, the launch of various GCC state policies changed the terms of the conversation.

On June 1, 2026, the launch of the Haryana GCC Policy 2026, part of the broader **"Make in Haryana Industrial Policy 2026"** targeting ₹5 lakh crore in investment and 10 lakh jobs, drew ₹1.10 lakh crore in first-day MoUs, including ₹30,000 crore in foreign direct investment commitments.

The National Australia Bank signed for a global innovation center. **Anant Raj committed ₹20,000 crore for data center infrastructure.** The state unveiled **"Single Window 2.0,"** an AI-enabled investment portal described by officials as **"moving from digitization to intelligent governance."**

Something decisive has shifted. 2026 is the year India's GCC ecosystem enters high maturity: **the move from cost optimization to AI-led, innovation-driven, strategic operations.**

The Haryana move is the most dramatic single-day policy event in India's GCC calendar this year, but it is not an outlier. It is the culmination of a wave that began with the Union Budget 2025-26, which introduced India's first national guidance framework for GCC promotion, prompting states to respond with striking speed.

Between 2024 and mid-2026, ten states either notified, drafted, or formally announced dedicated GCC policies. Collectively, they are **targeting over 2,500 new GCCs, 1.5 million new jobs, and ₹75,000 crore in fresh investment, all within five years.**

Market at a Glance

2,100+
GCCs Operating in India
↑~2,400 expected by 2030

2.4 M
Professionals Employed
↑4.25-4.5L New jobs in FY26

$98.5M
GCC revenue, FY 2026P
↑ 40% YoY jump

170+
New GCC Setup in 2025
51% New Entrants, 49% Expansions

35%
Fortune Global 500 with India GCCs
Core Tech & Innovation mandates

185+
AI/ML Centres Of Excellence
AI hiring #1 Globally

THE NEW ERA OF SUBSIDIES: HARYANA'S GCC POLICY 2026

Launched June 1, 2026, by the Chief Minister of Haryana, as part of the "**Make in Haryana**" industrial push, a package of **10 sector-specific policies targeting ₹5 lakh crore in investment and 10 lakh jobs over five years.** On day one, the state signed **MoUs worth ₹1.10 lakh crore, including ₹30,000 crore in FDI commitments.**

The policy replaces the legacy **HEEP 2020 framework and scraps the old A-B-C-D block classification system**, replacing it with a dynamic **core/intermediate/sub-prime/prime-focus structure** that extends incentives across every block of the state.

Incentive	Detail	Note
CAPEX subsidy	Up to 30% for Ultra Mega projects	Customised tiers for Mega & Ultra Mega
Net SGST reimbursement	30%–70% for up to 12 years	Tied to intra-state sales
Employment generation	₹1 lakh/employee/yr for 10 yrs (15%+ local workforce)	₹1.2 lakh for women/SC/ST
Internship stipend	50% reimbursement, up to ₹15,000/month	Industry-academia pipeline
R&D support	Up to ₹50 crore	Paired with CoE grants
Incentive disbursement SLA	50% within 7 working days; balance within 45 days	8% p.a. penalty on the state for delays post April 1, 2026
PLI top-up	50% top-up on central PLI incentives	Semiconductor & electronics focus

Three institutional anchors make this policy architecturally distinct.

First,
The Haryana GCC Mission is a dedicated execution body for single-window facilitation, global roadshows, and GCC-academia coordination.

Second,
a global AI center in Gurugram and an advanced computing facility in Panchkula.

Third,
The AI-enabled Single Window 2.0 ("Intelligent Investment Facilitation Portal") is an AI agent, investment blueprint generator, and GIS-based land identification system in one platform.

Day-one anchors:
Anant Raj (₹20,000 crore data center, 307 MW IT capacity, 6,000 jobs); National Australia Bank Global Innovation Center; Reliance MET City; and Sumitomo Corp. India.

Haryana's differentiated bet: compete on ecosystem intelligence, not just subsidy depth. The disbursement SLA with a statutory interest penalty is the first of its kind in Indian industrial policy; it turns "speed and trust" from a slogan into a contractual obligation.

UP'S GCC GAMBIT:
A 500-CENTRE VISION FOR THE AI ERA

Uttar Pradesh made headlines at the **MachineCon GCC Summit** in mid-June, where **Chief Minister Yogi Adityanath and state officials unveiled a hyper-ambitious roadmap.**

- **The Goal:** Establishing **500 GCC units and generating 40 million sq. ft. of Grade-A office space by 2031.**
- **The Sweeteners:** Backed by their **₹225-crore AI Mission,** UP is weaponizing its annual pool of **200,000 STEM graduates** to build deep-tech hubs in **Noida, Lucknow, and Kanpur,** utilizing the newly operational **Noida International Airport at Jewar** as a massive logistics and accessibility lever.
- **Startup Policy-2026:** In a major meeting on June 7, the Chief Minister ordered the drafting of a new **Uttar Pradesh Startup Policy-2026,** intending to make the state the country's leading startup destination. The policy will focus on **deep-tech, AI, machine learning, quantum technology, robotics, and semiconductors.**
- **Global Investor Outreach:** On June 24-25, CM Yogi led a major investor roadshow in Bengaluru under the UP Global Growth Dialogue 2026, pitching the state's investment story across infrastructure, IT, and IT-enabled services, GCCs, and FDI.
- **Investors were briefed on major projects,** including the expressway network, defense corridor, data center park, EV ecosystem, and the state's growing manufacturing sector.

The **GCC incentive stack** is structured around two tiers: **Level 1 GCCs and Advanced GCCs,** with the latter requiring **FDI of at least ₹50 crore from a Fortune Global 500 or Fortune India 500 company for case-specific customization.**

225 Cr	32.8 Cr	900 Cr	5 GW
UP AI Mission allocation (FY2026-27 Budget)	AI Centers of Excellence & Data labs	Data center capacity across 8 parks (30,000 Cr)	AI compute Corridor target by 2040

Incentive	Level 1 GCC	Advanced GCC
OPEX subsidy (lease, BW, cloud, power)	20% · max ₹40 Cr/yr · 5 yrs	20% · max ₹80 Cr/yr · 5 yrs
Interest subsidy	5% p.a. on term loan, max ₹1 Cr/yr · 5 yrs	
Employment subsidy	₹1.2 lakh/employee/yr	₹1.8 lakh for UP domicile/women/SC/ST
Skill development	₹50,000/employee reimbursement · max 500 employees · ₹50 lakh ceiling/yr	
Startup PoC support	50% cost reimbursement · ₹2 Cr ceiling	
Pollution Control Act	Exempt (except power gensets > 25 KVA)	

The geographic strategy is deliberately distributed. **Noida-Greater Noida** remains the backbone; **Microsoft's largest R&D facility outside HQ** sits here, and **LG announced ₹1,000 crore for an AI/software GCC.** But the state is now actively building **Lucknow (proposed 20-acre AI City), Kanpur, Varanasi, Gorakhpur, Agra, and Prayagraj as genuine GCC anchors.**

The **₹100 crore State Data Centre 2.0** and the long-term **40 GW data center** capacity target by 2047 are designed to make UP **"Asia's most secure, scalable inland AI territory."**

The AI mission prioritizes **predictive healthcare, disease surveillance, and digital governance, with ₹95 crore** set aside for a cybersecurity operations center.

On skills, a **June partnership with IBM/OneMNB will train 1.5 lakh youth in AI and emerging technologies**, directly feeding talent into the new centers.

PUNE'S COUNTER-STRIKE:
HOW THE CITY SURPASSED 500+ GCCS

Pune is now **India's third-largest GCC city by count** and, per a KPMG-AMCHAM report, one of its fastest-growing. **500+ active GCCs across 20+ industries,** firms from 30 countries, and 130+ new or expanded centers since 2024 alone. The city accounts for **14% of India's GCC units and is growing at a 9% CAGR; projections point to 660–680 GCCs by 2030.**

What makes this milestone particularly striking is the velocity: more than 130 GCCs have entered or expanded in Pune since 2024 alone. Approximately **40% of these new mandates are AI-first setups,** signaling a decisive shift toward high-value, innovation-led operations rather than traditional back-office functions.

PUNE

500+ GCCs, 9% CAGR

- **90,000+** STEM Graduates per year
- **16% attrition -** lowest among Tier-I cities
- **55% US-headquartered** anchors
- Defence-GCC Corridor (Pune-Ahilyanagar-CSN)

Automotive ER&D | Deep-Tech | BFSI

MAHARASHTRA GCC POLICY 2025

Target: 400 new GCCs, 4L jobs

- **Zone I (MMR + PMR):** 40% Payroll reimbursement above ₹1L/month (3 yrs)
- **Zone II (rest of state):** 50% Payroll reimbursement
- Ultra Mega GCCs: Customised Incentives
- Policy Outlay: **11,702 Crore through 2040**
- MAITRI single-window clearance

Nagpur | Nashik | CSN

This month's developments have been nothing short of explosive:

- **Generac inaugurated its first India GCC in Pune,** a **21,494 sq. ft. facility designed to accommodate 150+ employees,** positioned as a multifunctional strategic hub that will evolve into a Center of Excellence for engineering domains.

- **BP expanded** its Pune operations with a **10.4 lakh sq. ft. lease at Gera Commerzone in Kharadi,** marking one of the city's largest commercial office transactions, and now employs over 2,000 professionals across digital innovation, analytics, and engineering services.

- **Boston Scientific** expanded its Pune footprint with nearly 1.3 lakh sq. ft of additional office space to scale healthcare technology and operations.

- **Mizuho Financial Group** established its third GCC in India, with a new Pune facility in Kharadi, and plans to scale its India workforce to nearly 1,000 employees by 2027.

Maharashtra's mature play is sector-specific clustering. For mid-market GCCs, **Pune's manufacturing DNA's proximity to Bosch, Mercedes, Volkswagen, and the Defense Corridor delivers ER&D depth** that no IT-first city can replicate overnight.

The Maharashtra Industrial Policy 2026 adds wage-linked incentives, five-year power duty exemptions, and accelerated depreciation, shortening the path to breakeven for capital-constrained entrants. **The Pune-Mumbai-Navi Mumbai triangle** is also India's fastest-growing data center belt, positioning the cluster for AI workload growth.

Kerala's 200-GCC AMBITION

Under its bold **Vision 2031** strategy, the Kerala government has unveiled a massive economic roadmap: attracting **200 new Global Capability Centres (GCCs) to the state by 2031.** By positioning itself as a sustainable, lower-attrition alternative to India's overcrowded metro hubs, Kerala is pitching a high-value model that global enterprises are starting to take very seriously.

Rather than choking a single city, Kerala's strategy relies on a **distributed tech corridor across three specialized hubs:**

- **Thiruvananthapuram (The Deep Tech Anchor):** Anchored by the sprawling **Technopark,** the state capital is positioning itself for high-value operations in AI, cybersecurity, and aerospace.
- **Kochi (The Fintech Locomotive):** Centered around **Infopark,** Kochi is scaling rapidly to capture heavy-hitting engineering, data analytics, and BFSI centers.
- **Kozhikode (The R&D Outpost):** Driven by **Cyberpark,** this hub offers a cost-optimized ecosystem for agile tech teams and localized innovation.

On June 12, 2026, Infoparks Kerala signed an MoU with Inductus Group, a GCC advisory firm, to strengthen Kerala's visibility among multinationals and attract investment.

The draft GCC Policy 2025 concluded its **public comment phase in May 2026, and formal notification is expected shortly.**

The state's differentiation story is genuinely compelling: **95% digital literacy (highest in India), Kerala University of Digital Sciences (India's first on-campus digital university), 6,400+ startups backed by 63 incubators, and a livability profile** that delivers structurally lower attrition than the southern metros.

Kerala Ecosystem Strengths

Strength	Metric	Signal
Digital Literacy	~95%	Highest in India
Startup Ecosystem	6,400+ ventures	63 incubators, $665M facilitated funding
Skilling	60,000 digital learners	Kerala Knowledge Economy Mission × Coursera
Life Sciences	Bio 360 Park, TVM	$24M CSIR investment (2024)
Policy Status	Draft GCC Policy 2025	The comment phase closed in May 2026; notification pending
Grade A Office	Limited vs. Tier-I	Key infrastructure gap to close

Kerala's most compelling GCC pitch is its differentiation story, not its incentive stack. For a mid-size BFSI analytics hub, a life sciences R&D center, or a digital transformation unit seeking lower attrition and higher talent loyalty, Kochi checks boxes that Bengaluru structurally cannot. The gap to close is Grade A office supply and air connectivity, not ambition.

THE POLICY SCORECARD

State	Policy Status	GCC Expansion Target	Employment Target	Strategic Differentiator	Key Tier-II / Emerging Hubs
Karnataka	Notified (Nov 2024)	500 new GCCs by 2029	350,000 jobs	India's first dedicated GCC policy; 3 Global Innovation Districts; home to ~30% of India's GCC ecosystem	Mysuru, Mangaluru, Hubballi–Dharwad, Belagavi
Telangana	Policy Under Development	120 new GCCs by 2026	N/A	TS-iPASS single-window clearance, AI City initiative in Future City, and Tier-II/III GCC policy in progress	Warangal, Nizamabad, Karimnagar
Haryana	Notified (Jun 2026)	100+ new GCCs	30,000+ jobs	AI-enabled Single Window 2.0, Global AI Centre in Gurugram, and an advanced computing hub in Panchkula	Panchkula, Hisar
Maharashtra	Announced (Sep 2025)	400 new GCCs	400,000 jobs	Strong BFSI, aerospace & defence ecosystem; Mumbai–Pune–Nagpur innovation corridor	Nashik, Nagpur
Tamil Nadu	Sector-Integrated Framework	Not specified	Not specified	Semiconductor and ER&D leadership; annual talent pool exceeding 500,000 graduates; land incentives up to 50%	Coimbatore, Madurai
Gujarat	Notified (Feb 2025)	250+ GCCs	50,000 jobs	GIFT City IFSC advantage: CAPEX support up to ₹200 crore and OPEX support up to ₹40 crore	Ahmedabad, Vadodara
Andhra Pradesh	Notified (Dec 2024)	Not specified	Not specified	Industry-leading salary and HRA reimbursements are aligned with Swarna Andhra Vision 2047	Visakhapatnam
Uttar Pradesh	Notified (2024)	1,000 GCCs (aspirational)	200,000+ jobs	Aggressive fiscal incentives, including stamp duty waiver, land subsidy, and capital support for advanced GCCs	Noida, Lucknow, Varanasi
Madhya Pradesh	Draft Policy (2025)	50+ GCCs	37,000+ jobs	Up to 50% operating cost advantage; capital subsidy up to ₹30 crore with payroll and rental support	Indore, Bhopal
Kerala	Draft Policy (2025)	200 GCCs by 2031	N/A	Quality-of-life positioning: Infopark Phase III and India's first AI Township initiative	Kochi, Thiruvananthapuram
Rajasthan	Notified (IT/ITES & GCC-focused incentives)	150+ GCCs (targeted)	40,000–50,000 jobs (expected)	Competitive operating costs; strong engineering talent pool; incentives for GCCs under Rajasthan Investment Promotion Scheme (RIPS); and a focus on digital, engineering, and BPM GCCs	Jaipur, Udaipur, Jodhpur

WHAT GCCS ACTUALLY LOOK FOR IN 2026?

The GCC selection framework has changed structurally in 2026. The traditional pitch centered around labor arbitrage and back-office efficiency is officially dead. As GCC committees evaluate destinations, the scorecard has **shifted from "Can this city execute at a lower cost?" to "Can this city own our IP, govern autonomous systems, and build our next-generation leadership?"**

The 2026 GCC Scorecard

Evaluation axis	What's changed in 2026	State implication
IP ownership	India-based GCCs now architect and own end-to-end global platforms. 60% of top-500 GCCs produce IP, not just services	IP courts, DPDP compliance, and DPA agreements are now location selection criteria
Agentic AI deployment	58%+ of GCCs are deploying autonomous AI systems beyond RPA into complex reasoning	States with AI CoEs, compute infrastructure, and AI skilling programmes win mandates
Talent seniority mix	Mid-senior roles (5–12 yr experience) now account for 77% of GCC positions, up from entry-level dominance	Cities with deep experienced talent pools (Bengaluru, Hyderabad, Pune) hold structural advantages
Attrition economics	A 100-member Pune team saves ₹6–8 Cr/yr vs. Bengaluru when salary, real estate, and replacement costs are modeled.	Low-attrition cities have a hidden cost advantage that exceeds headline subsidies
GCC maturity compression	27% of GCCs now reach "Portfolio Hub" stage in 5 years vs 10+ years previously	States with startup co-creation ecosystems accelerate this compression

This evolution has given rise to a mainstream corporate phenomenon: the Shadow Headquarters.

"Global giants like Goldman Sachs Bengaluru and Walmart Global Tech India now anchor significantly more core technical depth and architectural ownership than their official corporate headquarters."

As multinational leadership teams plot their next expansion, the ultimate question is no longer about scalability; it is about ownership, ecosystem maturity, and long-term strategic value.

THE TIER-II INCENTIVE STACK

The share of new GCCs in Tier-II cities rose from **5% (2019) → 7% (2024)** and is projected to reach **25–30% by 2030.** Already 220+ GCC units operate beyond the six Tier-I metros. The states that are winning the Tier-II game share three traits: **they identified specific anchor cities before the demand curve, built infrastructure ahead of it, and aligned skilling with sector focus.**

The cost math is real. A 200-person GCC in Bhubaneswar, Indore, or Coimbatore **costs 25–30% less over three years than an equivalent Bengaluru operation before incentives.** After formally notifying state incentive offsets, which add a further 5–10 percentage points, the gap widens significantly. **Real estate alone is 30–50% lower than Tier-I.**

Coimbatore (Tamil Nadu)

Manufacturing DNA, embedded systems, and engineering ER&D. Trimble (2,000+ employees), Bosch IoT, and Elgi Equipment. CBRE is cited as "South India's rising GCC frontier."

30–35% cost vs Bengaluru

Indore (Madhya Pradesh)

Target: 50+ GCCs in Indore & Bhopal. Capital subsidy up to 40%, payroll assistance, and R&D support. Multi-sector innovation cluster with a strong academic supply from IIM Indore.

32–38% cost vs Bengaluru

Vadodara (Gujarat)

Semiconductor and research activities. Collabera launched its flagship GCC hub here in early 2026. Schneider Electric's industrial automation hub is the anchor. Strong industrial and chemical supply chain.

28–33% cost vs Bengaluru

Bhubaneswar (Odisha)

Odisha GCC Policy (Nov 2025): 5 advanced GCC hubs across the Bhubaneswar-Cuttack-Puri-Paradip corridor. Target: ₹1,000 Cr investment, 50,000 jobs. Semiconductor and research specializations are emerging.

30–35% cost vs Bengaluru

Lucknow (Uttar Pradesh)

UP's second anchor after Noida. Proposed 20-acre AI City. ₹225 Cr AI mission driving CoE build-out. HCL Technopark is operational. IIT Kanpur feeds the talent pipeline.

35–40% cost vs Bengaluru

Jaipur (Rajasthan)

Growing services and design economy. Digital-trained graduate supply is expanding. A strong hospitality and services sector feeds customer experience in GCCs. Top-5 ease of living index cities.

30–38% cost vs Bengaluru

The critical caveat: states that announce before delivery lose deals at the final stage. GCC leaders should verify Grade A office supply and last-mile connectivity timelines independently before committing to any emerging city.

WHO MOVED IN, WHO EXPANDED, WHAT IT SIGNAL?

Global Company/Partner	Indian Hub	Movement Type	Core Focus & Strategic Signal
Nationwide	Hyderabad	Fresh Entry	The Fortune 100 giant drops a massive technology campus to anchor global BFSI engineering.
The Walt Disney Company	Bengaluru	Massive Expansion	Locks down 1.75 lakh sq. ft. at RMZ Ecoworld to weaponize core tech engines for global streaming networks.
Target India	Bengaluru	Mega Expansion	Secures a colossal 8.31 lakh sq. ft. at Embassy Manyata, hyper-scaling its apex digital retail hub.
Nestlé	Hyderabad	Fresh Entry	The FMCG powerhouse claims its stake in Hyderabad, pivoting global supply data and consumer tech to India.
BMS Group	Mumbai	Fresh Entry	Launches its elite analytics core to pioneer AI-driven, parent-controlled international reinsurance broking.
CIBC	Hyderabad	Fresh Entry	The Canadian banking titan stakes its claim to engineer high-tier cross-border risk intelligence networks.
N-able, Inc.	Bengaluru	Fresh Entry	The NYSE-listed cyber giant invades Bengaluru to command global enterprise threat hunting.
Generac	Pune	Fresh Entry	Launches its GBTC powerhouse to spearhead smart energy grids and bleeding-edge IoT systems.
Kraft Heinz	PAN India	Footprint Surge	Overhauls its global infrastructure, weaponizing Indian talent to lead global operations.
HMH Tech India	Pune	Fresh Entry	The innovation engine of learning giant HMH lands to reinvent next-gen digital educational tech.
Blupace Tech	Hyderabad	Fresh Entry	Deploys a specialized infrastructure hub explicitly built to command automated cloud solutions.
DSP	Bengaluru	Fresh Entry	The UK data powerhouse sets up its first overseas captive fortress to manage cloud architecture.
Consilio	PAN India	Scale-Up	Aggressively expanding its digital forensics and legal tech grid across premium tech corridors.
Zyoin & KDEM	Karnataka	Ecosystem Alliance	Ink a strategic MoU to build high-velocity soft-landing launchpads for incoming global tech centers.
Lulu IT & Collabera	South India	Ecosystem Alliance	Forge a workspace alliance to deliver hyper-agile, turn-key setups for rapid international enterprise deployment.

JUNE 2026 EVENTS & SUMMITS

1st June
Gurugram

Make in Haryana - GCC Policy 2026 Launch

CM Nayab Singh Saini launched the Haryana GCC Policy 2026 alongside nine other sector-specific policies. Day-one MoUs of ₹1.10 lakh crore were signed, including ₹30,000 crore in FDI. Anchor signatories: Anant Raj, National Australia Bank, Reliance MET City, and Sumitomo Corp India.

4th June
Bengaluru

ET Edge GCC Summit 2026 - Bengaluru Edition

Part of ET Edge's year-round GCC summit series. This edition focused on "The Rise of the GCC CEO": how GCC leadership is shifting from delivery to owning products, platforms, and IP. C-suite executives, GCC heads, policymakers, and ecosystem partners in attendance. Featured panel on how BFSI GCCs are leading the AI shift: 170 centers across 333 units now owning risk, fraud, and compliance work.

19th June
Mumbai

GCC Converge Summit & Excellence Awards 2026

Theme: "From GCC to GIC Building India's Global Innovation Centers." The summit's Excellence Awards recognized trailblazers across categories, including Outstanding Leadership, CFO Excellence, Talent & Culture Transformation, and Emerging GCC Talent. Attendance profile: Country heads, MDs, CEOs, CFOs, and GCC leaders.

19–21th June
Goa

MachineCon GCC Summit 2026 - 10th Edition (Invite-Only)

Three-day residential conference at Alila Diwa, Goa. Theme: "Accelerating GCC Growth in India." The only closed-door residential platform where GCC decisions are genuinely debated, not just announced. 100+ senior GCC heads, CIOs, CTOs, and global operations executives. Sessions on AI adoption, talent scale-up, compliance, and cross-border operating models. Previous editions featured Karnataka's IT minister; this edition included government leaders from UP's IT & Electronics Department.

25th June

Pune

ET Edge GCC Summit 2026 - Pune Edition (12th Edition)

The summit returned to Pune, India's fastest-growing large GCC city, for its 12th edition, highlighting the city's 500-plus GCC milestone. Opening keynote: **"From Capability to Command: How India's GCCs Can Lead the AI Era."** Featured discussion on the Pune-Ahilyanagar-CSN defense corridor and its implications for the next generation of ER&D GCCs. Maharashtra government officials presented the GCC Policy 2025 incentive framework to new entrants.

25th June

Bengaluru

UP Global Growth Dialogue 2026 - Investor Roadshow

CM Yogi Adityanath personally chaired the roadshow in Bengaluru, a deliberate move to pitch UP directly to GCC decision-makers in the southern ecosystem. Three thematic sessions: Infrastructure, IT/ITeS & GCCs, and FDI. Focused pitches for Lucknow AI City, Noida-Greater Noida expansion, and UP's ₹225 Cr AI mission. Adityanath: "UP will shine on the Global Capability Center map."

For the first time, GCC summit agendas in June 2026 consistently featured state government representatives pitching directly to GCC heads, not just industry bodies moderating. The UP roadshow in Bengaluru, Haryana's policy launch with live MoU signings, and Maharashtra's Pune edition all point to the same shift: state governments have moved from publishing incentive schedules to active investor acquisition.

Will India's STATE GCC POLICIES CONVERGE OR DIVERGE BY 2030?

As more states formalize GCC policies, the base package **capital subsidies, payroll support, stamp duty exemptions, and single-window approvals become table stakes.** The differentiating variable shifts entirely to ecosystem depth: **talent pipeline quality, startup–GCC co-creation infrastructure, R&D institution proximity, and government execution credibility.**

Karnataka, Telangana, and Tamil Nadu have multi-decade ecosystem leads that no subsidy package can close in five years. Maharashtra is building a credible challenger position through sector clustering. Gujarat has made the single most architecturally distinctive bet: GIFT City's IFSC framework with a live anchor tenant in Infineon to prove the thesis. The NCR corridor has scale and proximity to corporate India, but needs ecosystem deepening to convert cost-driven wins into innovation mandates.

The signal to watch: not which state publishes the most generous incentive schedule, but **which state can point to 50 GCCs in operation, hiring at scale, three years after policy notification.**

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**

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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.

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COPO & Digital Twin Integrated Service Model

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

"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

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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