Snapshot of GCCs in India (as of FY2024)

1700+	2975+	USD 64.6 Bn	1.9 Mn
GCCs in India	GCCs Centers in India	India's GCC Revenue	Total GCC Talent

Key Capabilities

GCC setups are predominantly digital-focused (67%), with Hyderabad emerging as the leading destination for new digital GCCs, followed by Pune and Bengaluru.
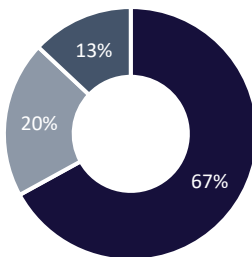
Non-tech functions still play a minor role (11–20%), but their steady inclusion highlights the diversification of GCC capabilities beyond the core technology.
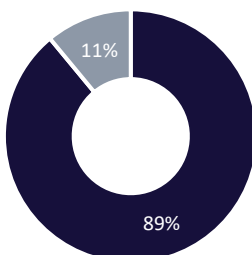
Prime Hotspot

Hyderabad has remained the top choice for new GCC setups, attracting global firms such as Deutsche Börse Group, Dai-ichi Life Group, Heineken NV, and Nemetschek Group, driven by its strong talent pool, technology ecosystem, and pro-business policies.
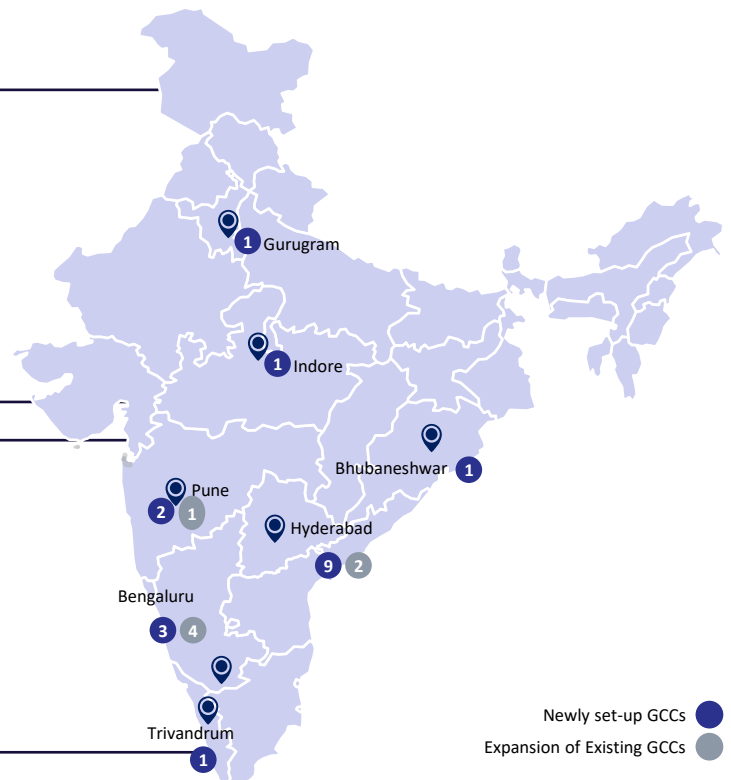
Major companies, such as DHL Group, are also setting up and scaling their GCC operations in tier-2 cities, including Indore and Bhubaneswar, among others.

Donut chart 1:
- Digital Capabilities: 67%
- Traditional Tech Capabilities: 20%
- Non-tech Capabilities: 13%

Donut chart 2:
- Digital Capabilities: 89%
- Non Tech: 11%

Map of India with GCC locations:
- Gurugram: 1
- Indore: 1
- Bhubaneshwar: 1
- Pune: 2, 1
- Hyderabad: 9, 2
- Bengaluru: 3, 4
- Trivandrum: 1

Legend:
- Newly set-up GCCs
- Expansion of Existing GCCs

- Non-tech capabilities include finance, marketing, communications, human resources, legal, etc.
- Digital capabilities include artificial intelligence, cloud computing, big data, analytics, etc.
- Traditional tech capabilities include software development, security operations, etc.

- The numbers on the map represent the number of new and expanded GCC locations in each city

Note: The analysis is based on the news related to GCCs from July 2025 to September 2025
Sources: News articles, Benori monthly GCC newsletters, publicly available databases, Nasscom

The Voice of Industry Leaders

"

The GCC ecosystem, including the IT sector, has evolved over the past 25 to 30 years. But for us to have an escaped velocity, business connectivity and customer centricity are very important. This has to be inculcated by culture as much as by the ecosystems in which we play. Much growth has come from the sheer prowess of having digital tech skills, but you'll need to do more.

Pradeep Menon, Managing Director and CEO, HSBC Technology India

"

The biggest word in innovation is AI. GCCs have to evolve at the same pace as technology to break boundaries. The culture of innovation is most important for GCCs.

Milesh J, Head of Strategy and Operations, SAP Labs India

Government Initiative

Karnataka has launched KATALYST, an ease-of-doing-business cell under the GCC Policy 2024–2029. Through this initiative, the state aims to attract 500 new GCCs by 2029, creating 3.5 lakh jobs, and generating USD 50 Bn in economic output, while streamlining investments and fostering ecosystem collaboration.

Upcoming GCC Events

GCC Annual Conclave

Date: 26th November 2025

Location: Bengaluru

Theme: Building Resilient & Self-Sustaining Hubs

MachineCon GCC Summit

Date: 29th November 2025–1st December 2025

Location: Goa

Themes: Designing Future-ready GCCs that scale and innovate, GCC India 2030: From Satellites to Co-leaders, Cracking the Talent Equation: Attract, Retain, Reskill at Scale, Policy and Regulation that Strengthen India's GCC Advantage, Beyond the Metros: Unlocking Tier-2 and Tier-3 Growth, Workplaces that Inspire: The New GCC Real-
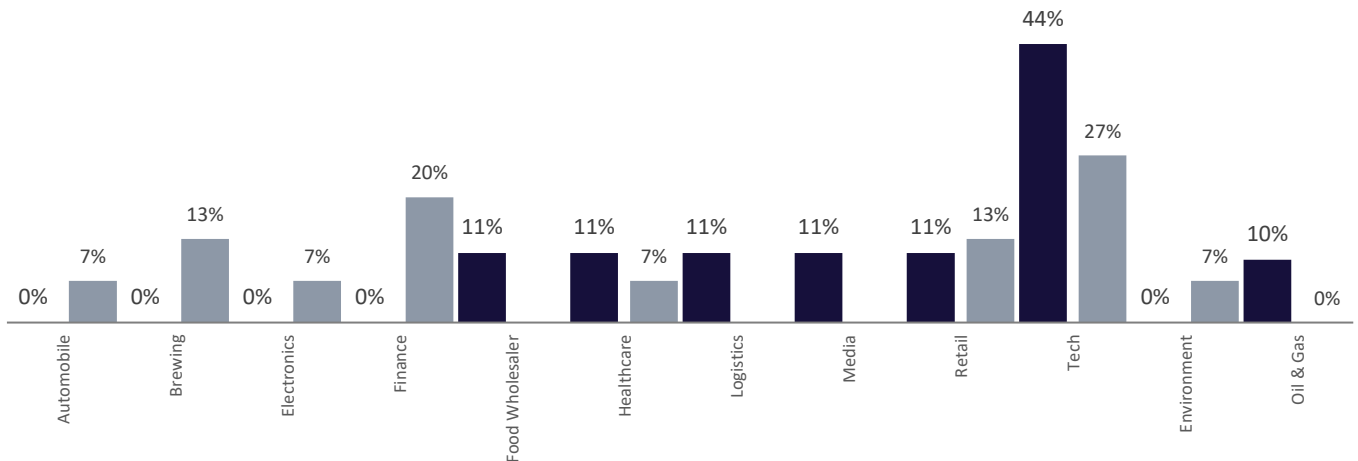
Estate Blueprint

The GCC Leadership Conclave

Date: 13th November 2025–14th November 2025

Location: Hyderabad

Themes: The Next Frontier: Mid-Market GCCs Rising, The Enterprise AI Playbook, GCCs as Digital Command Centers, Enterprise Digital Twins with AI Agents, Scaling Generative AI Beyond Pilots, Human + AI Collaboration in Mid-Market GCCs, CFO Lens: Redefining Enterprise Value — Risk Intelligence, Digital Finance & Capital Efficiency in the GCC Era, Vision 2030: India as the World's GCC Capital — Building the Next Trillion-Dollar Opportunity through GCC Thought Leadership

Note: The analysis is based on the news related to GCCs from July 2025 to September 2025
Sources: News articles, Benori monthly GCC newsletters, publicly available databases, *Deccan Herald*, *Economic Times*, *GCC Leadership Conclave*, *Economic Times*, *MachineCon GCC Summit*

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Industries Shaping the GCC Landscape in India

GCCs are increasingly focusing on digital innovation, financial services, and retail operations. Technology and Retail are the dominant sectors in the GCC landscape, with technology taking the lead, highlighting its key role in driving the GCC's growth.

Sector	Value
Automobile	0% / 7%
Brewing	0% / 13%
Electronics	0% / 7%
Finance	0% / 20%
Food Wholesaler	11%
Healthcare	11% / 7%
Logistics	11%
Media	11%
Retail	11% / 13%
Tech	44% / 27%
Environment	0% / 7%
Oil & Gas	10% / 0%

The percentages in the chart indicate the proportion of newly set-up GCCs and the expansion of existing GCCs within each sector.

Global Brands Establishing and Expanding GCCs in India

Newly Set-up GCCs

Tech

Kirby BUILDING SYSTEMS · MERGEN I.T Services · Assent · NEMETSCHEK GROUP

Finance | **Environment**

Dai-ichi Life · Arch · TEREX

Automobile | **Electronics** | **Healthcare**

ARROW Five Years Out · HCA Healthcare

Brewing | **Retail**

HEINEKEN · Carlsberg Group · LOGILE · Costco WHOLESALE

Expansion of Existing GCCs

Tech

Capgemini · IBM · Consilio · ATLASSIAN

Food Wholesaler | **Healthcare**

METRO · Availity

Retail | **Media**

Coupang · DAZN

Logistics

DHL

Note: The analysis is based on the news related to GCCs from July 2025 to September 2025
Sources: News articles, Benori monthly GCC newsletters, publicly available databases