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WHY GCCs LOVE INDIA

Educational alignment. Skill availability.
Government support. Language proficiency.
R&D capabilities. Robust infrastructure.

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Nearshore and Emerging centers like Vietnam, Eastern Europe, South America are proving attractive amidst improving talent pool and time-zone advantages.

- **Jason Chandralal**, VP, Happiest Minds Technologies

compliance, while healthcare GCCs focus on clinical data analytics and advanced R&D.

“This high-end innovation is complemented by India’s expanding network of Tier 2 cities like Vizag, Jaipur, and Coimbatore, which offer cost-effective talent pools and decentralised innovation capabilities.”

Engineering, Research, and Development (ER&D) GCCs in India are experiencing exponential growth, expanding at 1.3 times the rate of overall GCC expansion, observes Alouk Kumar, Founder and CEO, Inductus. Here are some numbers to drive home the point. A contribution of US\$36.4 billion in revenue, this sector signifies a strategic pivot from back-office operations to cutting-edge, high-value activities. India hosts over 1,400 ER&D GCCs, employing 3 million engineers, making it one of the largest hubs for technical expertise globally. Also, patent filings in India have seen six consecutive years of growth, with a 25 per cent increase in recent years, the fastest surge since 2005, Kumar argues.

Here are some more examples to look at.

Singhal illustrates. “At Publicis Sapient, several groundbreaking innovations have been conceptualised in India. For instance, PS Bodhi, an AI-powered talent and skills development platform; the RHS Chatbotanist, created in collaboration with the Royal Horticultural Society ETC. Another example is our collaboration with Marriott, where we developed a data-driven, personalised guest experience platform that enhances customer engagement and loyalty.”

India’s pharmaceutical GCCs are interesting cases-in-point here. “For instance, a top pharma’s Hyderabad center leverages AI and ML to optimise drug discovery and clinical trials, significantly reducing timelines. Similarly, another pharmaceutical giant’s Bengaluru hub employs advanced analytics for precision

TIME FOR FLUTES

- There is a market size of US\$64.6 billion with 1800 GCCs in India and a projected scale of US\$100 billion by 2030.
- Also a 15% year-on-year growth in GCC-driven global business services, attributed to robust adoption of AI, ML and Cloud Computing
- Indian GCCs also demonstrated resilience amidst geopolitical challenges through diversification and enhanced risk management practices
- India saw a remarkable surge in establishing new GCCs in Tier 2 cities like Hubli, Jaipur, Coimbatore, and Chandigarh
- India hosts over 1,800 GCCs, accounting for approximately 50% of all GCCs worldwide
- In fiscal year 2024, India’s GCCs generated revenues of US\$64.6 billion, marking a 40% increase over the previous fiscal year
- Projections indicate that the market size will grow to US\$99-105 billion by 2030
- GCCs in India employ approximately 1.9 million people, with expectations to reach 2.5-2.8 million by 2030.
- 80% of new GCCs prioritise AI/ML capabilities, underscoring the emphasis on advanced technological proficiencies
- By 2030, AI and ML integration are expected to power 75% of GCC operations
- Over 85% of GCCs are forecasted to fully transition to hybrid and multi-cloud environments, optimising data management and scalability
- GCCs will invest heavily in upskilling initiatives, with 60% of budgets directed toward training in AI, data science, and cybersecurity by 2030
- Examples: Microsoft India Development Center (IDC), Ford’s Global Capability Center in Chennai, Broadridge India (Build-Operate-Transfer model). Recent investments include US energy firm Chevron and French pharmaceutical company Sanofi committing around US\$1.4 billion cumulatively to set up or expand their GCCs in India.

Source: *The GCC Compendium 2024 from Inductus*

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