India GCC Landscape Report: The 5 Year Journey (2025)

A VentureBean Industry Analysis

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This analysis distils key findings from the source report and frames them through VentureBean's lens, helping scaling Indian enterprises (₹10Cr–100Cr) translate macro insights into leadership and growth strategy.

VentureBean's Perspective

India now hosts over 1,800 Global Capability Centers employing 1.9 million people. The growth is real. But headcount and revenue tell only half the story. The harder question is whether these centres are building leaders at the same pace they are adding engineers. Most are not. The report confirms that GCCs are evolving from cost-saving units to strategic innovation hubs, yet the leadership pipeline has not kept up. The gap between the ambition (global decision-making, AI centres of excellence, cross-functional innovation) and the leadership maturity required to deliver on that ambition is widening.

Technical expertise alone does not equip a professional to navigate global complexity or drive strategic initiatives. As GCCs adopt AI, cloud, and advanced analytics, the demand is shifting from people who can build technology to people who can lead teams building technology across geographies. More than 50 percent of centres report difficulty finding adequately skilled talent, and the sharpest shortage is not in engineering. It is in second-line managers who can own outcomes, run global functions, and operate without constant escalation to the country head.

This is where VentureBean's work becomes directly relevant. We partner with scaling organisations to build leadership depth that matches their growth ambition. Through executive coaching, second-line development, operating cadence design, and fractional leadership, we help companies close the gap between their technical capability and their leadership maturity. For GCCs and the Indian enterprises competing with them for talent, this is no longer a nice-to-have. It is the constraint that determines whether growth sustains or stalls.

Significance of the Report

Published in 2024 by Nasscom in collaboration with Zinnov, the GCC Landscape Report provides a comprehensive assessment of India's rapidly expanding Global Capability Center ecosystem. The study tracks the sector's evolution from traditional cost-saving back offices to strategic innovation hubs that now contribute $64.6 billion in revenue and employ 1.9 million professionals. At the core of the report is a five-year view of how GCCs have matured across service delivery, talent transformation, ecosystem partnerships, and digital capabilities including AI. For Indian business leaders, the significance is twofold: the GCC sector is both a massive opportunity (as a client, partner, or talent source) and a competitive threat (as the single largest employer of India's best technical and managerial talent).

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Findings

India hosts over 1,800 Global Capability Centers, roughly half of all such centres worldwide, generating $64.6 billion in revenue.

The sector is projected to reach $100 billion by 2030. This scale makes GCCs one of the most significant employers of skilled professionals in the country.

The sector employs approximately 1.9 million professionals and is expected to grow to between 2.5 and 2.8 million by 2030.

In 2025 alone, these centres created over 380,000 jobs. The hiring velocity intensifies competition for technical and managerial talent across the Indian enterprise landscape.

GCCs have evolved from cost-saving units into strategic innovation hubs.

They are increasingly integrated into core product development, global R&D, and enterprise strategy, not just service delivery. Nearly 50 percent of GCCs now operate as portfolio or transformation hubs.

78 percent of newly established centres prioritise digital capabilities in AI, machine learning, and data analytics.

Over 500 dedicated AI/ML centres of excellence now operate across India. This concentration of AI talent has implications for every Indian business competing for the same skill pool.

Leadership structures within GCCs are transforming.

Global executive roles like Chief Transformation Officer are increasingly filled from India. Leadership roles from India have grown at 40 percent CAGR over the last five years. The shift from execution roles to decision-making roles changes what 'leadership readiness' means for the talent pipeline.

79 percent of centres have adopted hybrid work models, which has benefited workforce diversity.

Approximately 66 percent of centres actively prioritise gender diversity, and women in leadership roles have expanded significantly. Flexible work is proving to be a competitive lever for talent attraction.

Despite India producing over 1.5 million engineering graduates annually, more than 50 percent of centres report difficulty finding adequately skilled talent.

The shortage is sharpest in niche areas: AI, cybersecurity, and cross-functional leadership. Volume of graduates does not solve a quality and readiness gap.

To address talent scarcity and rising costs in metros, GCCs are expanding into Tier 2 and Tier 3 cities like Jaipur, Coimbatore, and Ahmedabad.

This geographic diversification creates opportunity for regional enterprises but also intensifies competition for local talent.

90 percent of centres have increased spending on cybersecurity and data privacy.

As GCCs handle more sensitive global operations, security maturity has become a baseline expectation, not a differentiator.

Operating in India allows multinationals to reduce costs by 40 to 70 percent compared to developed nations.

The cost of an AI specialist in India ranges from $25,000 to $60,000 annually versus over $150,000 in the US. This cost advantage sustains GCC growth but also drives wage inflation for Indian enterprises competing for the same talent.

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Thought Triggers

Provocative questions for CEOs, founders, and CXOs of scaling Indian businesses:

1. A new GCC opens every week in India, offering salaries up to 30 percent higher for niche roles. Your top talent has a lucrative exit strategy. Are you giving them a compelling reason to stay, or are you waiting to find out at the resignation?

2. India has proven technical capability, but a gap remains between those who can build technology and those who can lead global enterprises. Your engineers may be world-class. Are you investing in turning them into leaders, or just promoting your best performers and hoping they figure it out?

3. GCCs have evolved from back-office support into hubs driving worldwide innovation. If you had to expand into a new international market tomorrow, are your second-line managers capable of owning that outcome independently, or would it depend entirely on the founder or country head?

4. Decentralised decision-making is becoming the norm for successful global operations. Look at your second-line managers. Can they make consequential decisions, manage cross-functional trade-offs, and hold their teams accountable without escalating every issue upward?

5. Organisational maturity requires sustained investment in leadership development, not a one-off training programme. Does your company build leaders through intentional coaching, structured operating cadence, and real accountability, or does it rely on workshops and hope?

6. GCCs are actively hiring for emerging executive roles focused on cross-functional collaboration and transformation. If a multinational competitor sets up a centre in your city and recruits your best people for global leadership roles, what is your response? The answer should not be 'match the salary.'

Ready to Apply These Insights?

If this report resonated with you, let's explore how VentureBean can help your organisation navigate these challenges.

Book a Discovery Call — Schedule a Call