

INDUCTUS



THE GLOBAL GCC SUMMIT

25th September 2026, New Delhi, INDIA

Table of Contents

01	Setting the Stage	03
02	Lamp Lighting Ceremony	04
03	The KeyNote Perspective	05
04	USA Panel Keynote: Designing the Connected GCC: AI, Devices, and the Employee Experience	10
05	USA Panel: From GCCs to Global Innovation Engines: India as the Strategic AI, R&D, and Technology Hub for American Corporations	12
06	UK Panel Keynote: India's Talent and Technology Powering UK Global Growth	20
07	UK Panel: Leveraging India's Technology and Talent Advantage in the Backdrop of the India-UK FTA	22
08	Japan Panel Keynote: Building the Infrastructure Backbone for India's GCC Growth, Kochi's Case	31
09	Japan Panel: India's Emergence as an Innovation-Led Global R&D Hub and Offshore Service Delivery Centre, and the Prospect of Japan-India Co-creation in the Era of AI	33
10	EU Panel Keynote: What Europe and India Can Build Together: From Trade to Co-creation	41
11	EU Panel: The EU's Industrial and Technological Excellence and India's Talent, Scale and Digital Innovation: A New Chapter under the India-EU FTA	43
12	Irresistible India: An GCC Industry Compendium Launch	51
13	Irresistible India Award Ceremony	56

14	Our Partners	66
15	Strategic Partnerships	67
16	Inductus Service Models	68
17	Vote of Thanks	75
18	Media Bytes	76





SETTING THE STAGE

On September 25, 2026, the refined ambiance of the Hyatt Regency, New Delhi, served as the magnificent backdrop for the historic unveiling of 'The Global GCC Summit 2026.' Orchestrated by the Inductus Group, this premier gathering brought together visionary global leaders to inaugurate a definitive new era for Global Capability Centres in the region. Imbued with a profound sense of shared ambition and intellectual synergy, the event set a benchmark for cross-border collaboration and economic evolution under the monumental banner of 'Architecting India's Sunrise Era & the Epicenter of the \$980B GCC Economy.'



LAMP-LIGHTING *Ceremony*



The Global GCC Summit 2026 commenced with a solemn and auspicious lamp-lighting ceremony, invoking divine blessings for the event's success. Distinguished dignitaries were invited to the dais to jointly inaugurate the summit. As the lamp was lit, the traditional Sanskrit shloka "Shubham Karoti Kalyanam" was recited, symbolizing a prayer for auspiciousness, good health, and abundance. The ceremony set a serene and positive tone, concluding with a group photograph and a heartfelt round of applause, honoring the esteemed guests and officially welcoming the audience to the landmark event.





The **KEYNOTE** Perspective



Irresistible India: Why the GCC Moment Is Now?

In his opening address, Mr. Alouk Kumar, CEO and Managing Director of the Inductus Group, laid the foundational vision for the summit. Extending warm thanks to the delegates for gracing the summit with their time, Mr. Alouk set out why Inductus, as a consulting firm, believes this emerging sector merits the sustained attention of industry leaders, state governments, and policymakers. In his view, Global Capability Centers (GCCs) represent not only a business opportunity but also a national priority.

He anchored his case in demography. With roughly 65% of its population under 35, India holds the same dividend that once propelled China and Japan to global leadership in manufacturing and technology. Two imperatives follow: sustained economic growth and employment at scale. The recent slowdown among IT services firms, he noted, reflects neither weak demand nor diminished confidence in India, but a structural shift, as global corporations increasingly prefer to build their own capability centers rather than outsource.

The evidence, drawn from industry sources and presented in the newly launched book *Irresistible India*, is compelling. Nearly 60 GCCs were established in the first half of this financial year, with over 130 anticipated by year-end. Sector value has grown from \$92 billion to about \$100 billion, with projections of \$225 billion by 2030 and beyond \$980 billion by 2040. Women's participation has risen from 26% to 38%, with 44% targeted by 2030. Enablers now deliver operational centers in 180 days, half the earlier timeline.

He identified the US, Europe, Japan, and the UK as principal sources of growth. Some 1,600 Japanese firms operate in India today, a number projected to exceed 5,000 by 2030. India's capacity to deliver research and development at roughly 30% of Western cost, together with newly signed FTAs, strengthens this momentum.

His charge to the panels was clear: address the talent challenge through closer industry-academia partnerships, curricula aligned with industry needs, and cultural compatibility for foreign investors.

He concluded with heartfelt gratitude to all the dignitaries present.



**MR. ALOUK
KUMAR**

CEO, Inductus Group

Alouk Kumar



Capacity, Capability, and Creativity: India's GCC Journey



**DR. KISHORE
JAYARAMAN,
OBE**

**Group CEO - UK-India
Business Council**

Opening his address with gracious appreciation for the preceding speaker, Dr. Kishore Jayaraman, whose two decades of building businesses in India lend his remarks particular weight, offered a considered view of how Global Capability Centers (GCCs) have evolved and where they must go next. He commended the summit's shift toward country-specific GCC conversations as a welcome and well-directed step.

Dr. Jayaraman observed that GCCs have long outgrown their origins in IT services. While services remain one element, today's centers extend into knowledge processing, co-creation, and innovation, at times approaching genuine invention. Drawing on Ramachandra Guha's remark that India "grows by night," he recalled how the sector began as an export-oriented cost-arbitrage model. It emerged without government support, drew on the country's demographic dividend, and served global time zones, notably the US, while India slept.

That formative phase, he noted, was defined by capacity. Two decades later, India's talent depth is beyond question. The industry has since advanced to capability, moving from cost arbitrage to value arbitrage, where global partners and Indian teams conceive and create together rather than one side simply executing the other's instructions.

The next frontier, in his view, is creativity. India has no shortage of creative talent; what remains is the collective initiative to harness it. Those who create, he argued, shape their own destiny, generating employment, deepening knowledge exchange, drawing more work to India, and expanding service exports.

He also situated GCCs within a changing global landscape. Recent agreements, most notably the India-UK FTA, reflect a shared conviction that trade is central to job creation and technological progress. As the world moves from multilateralism toward bilateralism, he suggested, new avenues for collaboration will open.

Dr. Jayaraman concluded with measured confidence: as India strengthens its partnerships with the USA, the UK, Japan, and beyond, it is well placed to lead the next chapter. His closing thought was simple and memorable: capacity, capability, and creativity.

Dr. Kishore Jayaraman



MS. SANGEETA GUPTA

Senior Vice President
NASSCOM

From Capacity to Capability: GCCs as India's Intelligence Orchestrators

Expressing appreciation to the organizer for convening the summit, NASSCOM representative Ms Sangeeta recalled during her address that the term "Global Capability Center" originated with the association itself. It evolved from "captives" to "global in-house centers" before arriving at a name that reflects what India now offers: capabilities, not merely capacity.

The numbers speak for themselves. India is home to over 2,100 GCCs, nearly 500 of them established in the past five years, contributing roughly \$100 billion, about one third of the technology sector's \$315 billion valuation. Considerable headroom remains. Only 500 of the Global 2000 have a presence in India, and just 583 mid-market firms have followed. Compact "nano" GCCs, often launched with around 50 people, and private equity-backed centers present further openings.

Four shifts, she observed, will define the road ahead: from volume to value, from traditional workforce pyramids to talent aligned with present needs, from standalone centers to a collaborative ecosystem, and from execution to strategic influence. NASSCOM's maturity framework, spanning satellite, outpost, portfolio hub, and transformation hub, places only 43% of GCCs at the two advanced stages. Encouragingly, new entrants now begin there, frequently with an AI mandate. The most mature centers own end-to-end platforms, develop products for external markets, and host global leadership roles.

AI, she noted, is moving decisively from experimentation to production. Some 1,200 GCCs have AI/ML capabilities, and 250,000 of India's 600,000 to 700,000 data science professionals work within them. Cybersecurity remains an under-told story: roughly a quarter of cyber-focused GCCs house half of their global security workforce in India.

She offered a measured view on headcount, observing that firms now prize specialization and job-ready talent over bulk hiring. She encouraged closer collaboration with service providers, startups, academia, and government. She concluded her address with a compelling vision: GCCs as the "intelligence orchestrators" of their global parents.

Sangeeta Gupta



MR. WASIM MANSURI

Joint Director (IT)

***Directorate of ICT & E-Governance
Government of Gujarat***

Gujarat: A Policy-Driven Launchpad for India's Next Generation of GCCs

Mr. Wasim Mansuri traced the evolution of GCCs from customer care and back-office support in the 1990s and 2000s, through finance and HR operations, to centers that now sit at the core of organizations, working in R&D, design and product planning.

Against this backdrop, he presented Gujarat as a stable, policy-driven growth engine with a top-tier ease-of-doing-business ranking. Its economy has grown from \$15 billion to \$318 billion, with manufacturing contributing about 34% of state GDP and 17% of India's manufacturing share.

Having built this industrial strength, the state is now converging it with services and GCCs, and its IT and ITeS sector has grown roughly 250% in five years, with exports of nearly ₹10,000 crore.

The state's infrastructure includes one of India's longest coastlines, about 80,000 kilometers of roads, strong rail links, 19 airports (four international), and over 370 industrial estates. Talent is anchored by institutions such as IIM Ahmedabad, IIT Gandhinagar, and DICT Gandhinagar, spread across the state rather than concentrated in a few locations. GIFT City offers 700-plus offices, 47 upcoming IT parks, metro connectivity, an airport 10 to 15 minutes away, and tax benefits, while Dholera Smart City is advancing with a newly inaugurated expressway and a greenfield airport.

Ahmedabad hosts over 45 GCCs and Vadodara over 35, with Rajkot and Surat emerging, the latter named among India's top emerging job hubs in a LinkedIn report. He highlighted Gujarat's dedicated GCC, IT/ITeS and data centre policies, offering transparent capex, opex, interest-assistance and special incentives, so that investors know their benefits from the outset.

Wasim Mansuri



USA PANEL KEYNOTE

*Designing the Connected GCC: AI, Devices, and
the Employee Experience*



MR. MAYANK SHARMA

**Lead - APAC Partnerships
Android Enterprise
Google, USA**

Expressing his gratitude to the organizers and delighted to see a full house for the summit's second year, Mayank Sharma framed his remarks around two questions: How have GCCs evolved? And where leaders should direct their investments, roadmaps, and vision over the next three years.

GCC investment, he observed, has converged on three priorities: full-stack engineering, AI sandbox build-outs, and governance spanning AI and sovereign cloud data. The consequence for employees is significant, with endpoints per person rising fourfold. He encouraged leaders to plan across four infrastructure layers: primary compute, mobiles and tablets, servers and cloud, and IoT and smart edge, where on-device AI is rapidly redefining what is possible.

His central insight was that employee experience determines whether a GCC remains a cost center or becomes an innovation engine with a stake in the P&L. He illustrated the point with a vivid scenario: an executive evaluating a Chinese supplier by running its Mandarin annual reports through an AI tool, then moving seamlessly from design work to performance review. The strategic question, he suggested, is whether organizations are equipping their people with AI skills across every platform and device.

He highlighted Android's reach: nearly four billion users, more than 75% of mobile users globally, and one of the world's largest developer communities in India. Security operates at a comparable scale, with Play Protect scanning 200 billion applications daily, up from 125 billion a year ago. Zero-touch enrollment allowed one GCC to onboard 10,000 employees across four cities on day one, with personal and corporate data securely separated.

Notably, several India-born innovations are now scaling worldwide: voice-driven invoicing completed in seconds rather than minutes, offline vehicle-inspection guidance in local languages, and motor diagnostics through sound analysis.

Echoing Dr. Jayaraman, he urged GCCs to use AI to create intellectual property and extended an invitation to join Google's community, early-access, and bespoke partnership programs.

Mayank Sharma



FROM GCCS TO GLOBAL INNOVATION ENGINES

Speaker Insights



USA PANEL

*India as the Strategic AI, R&D, and Technology
Hub for American Corporations*

DR. SOUMIK DUTTA

Global Technology Head, Tata Consultancy Services (TCS)

MODERATOR

Opening the session with an illuminating anecdote, the moderator, Dr. Soumik Dutta, likened the United States to a mosaic of regions, each with its own working style, delivery priorities, and leadership culture, and each requiring thoughtful navigation from GCC leaders who engage their head offices every day.

He gently reframed the discussion as one of mindset rather than map: how GCCs are built, how they grow, and what responsibilities their leaders must embrace to reach the next level.

Drawing on his conversations with customers, he observed that organizations are inundated with vendor tools and polished demonstrations, yet find the transition from proof of concept to production far more demanding, resulting in delayed decisions and escalating token costs. His most pointed reflection concerned value: headquarters, he reminded the audience, does not measure GCC success by AI-assisted emails but by improvement in EBITDA.

He concluded with a defining principle for the era ahead. The GCC is never a finished architecture; it must be continually redesigned, tested, and evolved, with the discipline to change the model and evolve it once more.

Soumik Dutta



ANNA CATHERINE

Senior Director, Hewlett Packard Enterprise (HPE)

SPEAKERS (USA)

Speaking with the confidence of an organization, Hewlett Packard Enterprise (HPE), spanning infrastructure, cloud, AI, networking, and security operations, Anna articulated a compelling vision for the next-generation GCC.

It must graduate from being a "factory of AI implementation" to becoming the founder and owner of AI products, platforms, and governance, bringing architecture and solutions that scale globally rather than executing a roadmap defined elsewhere.

India, she suggested, should serve as the enterprise AI hub, building reusable assets such as enterprise LLMs and agentic frameworks instead of isolated solutions. Where companies deploy comparable AI technology, data and intellectual property become the true differentiators. Responsible AI, she emphasized, is an absolute "must": decades of trust built with customers and partners cannot be placed at risk, for tomorrow's customers will ask not whether an enterprise uses AI, but whether they can trust it.

She proposed more rigorous measures of success, including the share of platform development owned end to end, the percentage of architectural decisions taken in India, and revenue and margin contribution. Her closing challenge was incisive: if AI had existed from day one, would our processes look anything like they do today?

Anna Catherine



KAVITA MEHRA

Director, GCC Sales & Strategy - India, Dell Technologies

SPEAKERS (USA)

Drawing upon 22 years at Dell Technologies, Kavita Mehra offered a candid and thoughtful perspective on what distinguishes a support center from a strategic growth engine.

True growth, she explained, is a continuum that extends beyond headcount and may be judged through four rigorous tests. The first is mandate: whether the center responds to another team's request or contributes to a global solution, influencing the enterprise rather than a single function.

The second is decision-making authority, which must accompany growth and reach beyond the site into global decision processes, though without the need to decide alone. The third is co-creation, bringing together data engineers, AI specialists, business leaders, and functional heads to shape outcomes at scale. The fourth is how success is measured: the era of being the cheapest or meeting service-level agreements has passed, replaced by influence on revenue, creation of intellectual property, and strengthened resilience.

Her caution was respectful yet unambiguous: without this shift, GCCs that were delivery centers two decades ago risk becoming merely "innovation delivery centers." India's most underestimated strength, she concluded, is its capacity to lead, not only to execute, and its leaders must think as enterprise executives rather than site directors.

Kavita Mehra



ABHINAV GOEL

India GBS Site Leader, McCormick & Company

SPEAKERS (USA)

Representing a CPG company, McCormick & Company, that operates on thin margins and must remain nimble amid geopolitical change, Abhinav presented McCormick's India operation as an integral part of the enterprise rather than a separate unit.

The team identifies, first and foremost, as McCormick. Established as an AI-first GCC, with data science, analytics, and AI as its founding teams, it now delivers about 70% of the company's agentic data science work. These capabilities strengthen sales teams negotiating with major retailers such as Walmart and Amazon, equip procurement teams with the data to secure better contracts, and sharpen three-year supply chain forecasting amid seasonality and disruption.

His central message to the audience was heartfelt and emphatic: AI must be regarded as a business driver, not an efficiency tool, or it risks becoming a very expensive exercise in deployment.

Every employee has access to AI, and the India hub measures its success by its contribution to the company's top line. On the future of work, he spoke candidly: AI will eliminate many roles at the base of the pyramid, and it is therefore the moral responsibility of GCC leaders to upskill their people and create the new roles that AI makes possible.

Abhinav Goel





RAMESH THAMOTHARAN

GCC Site Head & Director - Global Operations, Illumina GCC

SPEAKERS (USA)

Leading Illumina's GCC in Bangalore, Ramesh introduced an organization at the forefront of genomics and DNA sequencing, whose technology helped characterize the COVID virus and its spike protein, and which now supports cancer research and personalized medicine.

Turning to the question of multifunctional GCCs, he observed that roughly 90% are multifunctional, yet few are genuinely integrated, with most remaining aligned to individual verticals. This, in his view, represents a significant opportunity because the problems businesses seek to solve do not respect functional boundaries.

GCC leaders are therefore well placed to establish shared priorities and common business metrics and to rally employees around collective objectives so that the center becomes more than the sum of its individual capabilities. Future value, he suggested, will lie not within functions but at their intersection.

For medtech organizations, where revenue impact materializes over a longer horizon, the more meaningful indicators are the depth of capability built and the degree of global ownership over processes. Looking toward 2030, he identified the defining attribute of a successful GCC leader as a business-ownership mindset: to be recognized not simply as a GCC leader but as an enterprise leader in the fullest sense.

Ramesh Thamotharam



PRASANNA EDARA

Head of Operations - GCC, Fictiv, MiSUMi Americas

SPEAKERS (USA)

Representing Fictiv, recently acquired by MiSUMi, Ms. Prasanna described an organization standing at the interface of the US and Japan, with integration progressing smoothly. Its Bangalore GCC supports MISUMI Americas across 16 portfolios spanning the supply chain and has shifted decisively from reacting to customer tickets and feedback to identifying design-for-manufacturability issues before they ever reach the customer.

As an AI-first center with universal AI access, Fictiv emphasizes outcomes over training. Its "AI leverage ratio" measures how many solutions employees build and how many manual workflows they automate.

Strong ideas are presented at all-hands meetings, then selected and scaled across the organization by a dedicated AI vertical. He identified four measures that US corporations value: time to market, innovation output that creates tangible value, AI leverage applied to genuine workflow transformation, and human-in-the-loop judgment.

Beyond AI, he named talent as the capability most worth investing in, particularly in strengthening the understanding of frontline and mid-level leaders about the GCC's strategic potential and in onboarding, adapting, and retaining people swiftly amid growth rates of 1.5x to 2x. He concluded that the GCC has moved from execution to genuine innovation, with decision-making resting with leaders on the ground.

Prasanna Edara





CLOSING TAKEAWAY

Across the panel, a consistent arc emerged: from delivery to ownership, from cost arbitrage to value and IP creation, from function-level to enterprise-level influence, and from AI as an efficiency tool to AI as a business driver, underpinned by responsible governance and investment in talent.



UK PANEL KEYNOTE

*India's Talent and Technology Powering UK
Global Growth*



MS. JAYA CHORARIA

**HM Deputy Trade
Commissioner for South Asia
British High Commission**

Addressing the distinguished gathering, Ms. Jaya Choraria observed that the UK and Indian economies are deeply complementary: Britain leads in financial and professional services, advanced manufacturing, clean energy, life sciences, and deep tech, while India has emerged as a powerhouse of digital transformation, engineering excellence, and research. Ms. Jaya noted that UK firms no longer come to India primarily for cost arbitrage but for innovation, AI talent, and global leadership.

More than 130 UK-headquartered GCCs now generate an estimated \$6.5 billion in annual value and employ over two lakh professionals, with 95% of activity focused on IT engineering and R&D. From BP's energy transition agenda to Rolls-Royce's 700-seat innovation center in Bengaluru. The expanded technology operations of HSBC, Standard Chartered, NatWest, Barclays, and Lloyds represent not back-office outsourcing but genuine value creation.

India's advantages, she emphasized, are talent at scale, with 2.5 million STEM graduates annually, the world's third-largest innovation ecosystem, and exceptional speed and agility.

Reinforcing this momentum, the UK-India Comprehensive Economic and Trade Agreement, in force since 15 July, is expected to add £25.5 billion to annual bilateral trade. She described it as the floor, not the ceiling, of ambition, with Vision 2035 deepening cooperation in technology, education, and security.

Jaya Choraria



UK PANEL

Opportunities and Challenges for UK Corporations



*Leveraging India's Technology and Talent
Advantage in the Backdrop of the India-UK FTA*

ROHAN KANCHAN

Senior Director – Corporate Lead, India & South Asia, APCO Consulting

MODERATOR

Opening the session, the moderator observed that India and the UK stand at a compelling inflection point, with India offering UK firms a strategic hub for critical operations in AI and digital engineering that extend well beyond cost.

With only limited time and six panelists eager to contribute, he steered the conversation with precision through strategic vision, capital allocation, talent, governance, regulation, and the future of the GCC model.

His questions drew out candid perspectives on how value is created, where investment flows, and what it takes to lead from India.

He highlighted one fresh idea from the discussion: GCCs generating a new revenue stream by advising other GCCs on setup and best practices, sharing hard-won experience across the ecosystem. He also reminded the audience that talent remains one of India's greatest strengths and that, when combined with the UK's depth in finance, research, and compliance, it opens a significant opportunity for the global aspirations of firms such as BP.

He closed by inviting each panelist to name the single constraint or solution that could accelerate the evolution of the GCC landscape, ensuring the discussion ended on actionable ground.

Rohan Kanchan





MOLYAMA KROMAH

Head Technical Solutions, India & Director, British Petroleum, UK

SPEAKERS (UK)

Speaking with the authority of five years of building BP's GCC in India, Ms. Molyama observed that organizations "come for the cost benefit and stay for the value." Over time, BP has steadily deepened the complexity of the work done here, and the India center is no longer seen as a service provider but as an integral extension of BP's global operations.

It even supports operational businesses within India, including a partnership with Reliance in oil and gas, which reflects a genuine, equal partnership with BP's wider organization. On where global capital is invested, she was thoughtful and direct.

Every business must compete, and as GCCs take on more complex work and move toward global leadership and decision-making, the transfer pricing and taxation environment currently makes India less competitive.

She suggested that enabling reforms would help sustain the advantage Indian GCCs enjoy today. On talent, she spoke in favor of mobility in both directions: welcoming colleagues from the UK, the US, and beyond into India and giving Indian talent the chance to experience other locations.

To create value, she explained, one must truly understand the business being served. She hopes the India-UK FTA will make this movement easier and the learning deeper.

Molyama Kromah



PETER JANSE

GCC Head, Haleon India

SPEAKERS (UK)

Mr. Peter grounded his remarks in facts. A recent study by SSON, he shared, found that only 11% of GCCs see themselves as value creators, while 89% still see themselves as service providers, and about 75% are still measured on service levels rather than business outcomes.

He saw this as a significant opportunity for GCCs to move from delivering an excellent service to delivering real value for their companies. Having arrived in India in May last year, he spoke warmly of the talent he has met, describing it as truly remarkable, and expressed his wish to see these professionals lead strategically.

Two mindsets, he suggested, will make that possible. The first is curiosity, where people come not merely to complete a task but to improve how it is done. The second is a digital mindset, as AI continues to advance. He encouraged openness to challenge, explaining that when he asks, "Why do we do this?" he is seeking efficiency and effectiveness, never fault.

His organization has even formed a junior leadership team of early-career talent, who advise and challenge the senior team on how work is done. He closed with a gentle caution: a GCC should never be seen as a separate entity, because it is part of the company.

Peter Janse



AMBUJ SONAL

Partner, Dentons Link Legal, UK

SPEAKERS (UK)

Mr. Sonal highlighted that as GCCs grow from outsourcing operations into creators of value, governance becomes increasingly important because parent companies remain accountable for compliance. He pointed to several areas deserving close attention: accountability under the Companies Act, transfer pricing, permanent establishment, data protection, and intellectual property.

Rather than appointing a director solely for compliance, he encouraged organizations to hire a true strategic leader, someone who understands the Indian framework thoroughly and can blend naturally with the culture of the parent entity and its Indian workforce. He also noted the importance of clearly defining where supervision and control rest, whether with the local entity or the parent, so that questions of governance can be answered with confidence.

On data protection, he offered a reassuring view. GDPR and India's DPDP, he said, are collaborative rather than conflicting. DPDP traces back to the Justice Srikrishna Committee report and draws roughly 80-85% of its principles from GDPR. His firm has advised several GCCs on bringing their global GDPR policies together with DPDP, and the exercise has proved quite manageable after a few adjustments. This matters especially because GCCs are so employee-heavy, and a unified policy on employee data brings real clarity.

In his closing remarks, responding to the question of what would accelerate progress, he agreed that technology infrastructure matters and added that the legal structure and government support need to be more forthcoming, observing that while support is visible, it remains decentralized.

Ambuj Sonal



SURYA T S

Director, Weaver & Tidwell

SPEAKERS (UK)

Mr. Surya framed the India-UK corridor as an opportunity rather than a threat. He expects a wave of UK GCCs to arrive, which will increase demand for niche talent, particularly leaders who understand DPDP and the wider legal framework. That may tighten the talent supply for US GCCs, but in his words, it is a good problem to have.

He suggested that US GCCs, with their long experience in India, can advise newcomers on setting up and share best practices so that the ecosystem grows together through partnership rather than competition. He also observed how professional boundaries are blurring. STEM graduates are joining CPA firms, while Infosys and Wipro are hiring accountants for their functional knowledge to implement AI tools in audits.

Today's specialists, he noted, need to know more than their own specialism, whether that is law, AI, or programming, which makes continued investment in learning and leadership development essential. Asked for the one change that would accelerate progress, he proposed joint UK-India work on AI infrastructure, noting that both lag behind the US even as data centers and AI talent flourish here. He added a hope for legal structures and government support that are more forthcoming, since the support seen so far remains decentralized.

Surya TS



SUNDEEP JAKHAR

Head of Public Affairs, ACCA, UK

SPEAKERS (UK)

Mr. Sundeep reflected on how India's GCC ecosystem has evolved from a model built on efficiency and cost to one increasingly centered on talent, technology, innovation, and value creation. The important question now, he suggested, is not whether India will remain the global GCC destination, but whether it is creating the right value for global businesses and UK businesses in particular.

He offered a thoughtful reframing of the talent debate. While he partly agreed that talent is an issue, he preferred to call it a capability challenge rather than a shortage, given India's abundance of STEM graduates.

ACCA's research shows that technical skill alone is not enough; GCCs need digital skills, communication, analytical ability, and the capacity to think beyond convention. The same research identifies the leadership pipeline as perhaps the biggest challenge ahead.

In his view, everyone has a role to play. Industry can invest in cross-functional training and ongoing leadership development. Academia can keep its curriculum closely aligned with the ground reality and make it more practical. Professional bodies can turn qualifications into real capability and employability, and ACCA is proud to be the first accountancy body to include data science as a paper. His closing message was that learning should never stop at university but continue throughout one's professional life.

Sandeep Jakhar



VIVEK GAUR

***Vice President, Network Engineering - Colt Technology Services,
Country Head & Managing Director – Colt India***

SPEAKERS (UK)

Mr. Vivek brought the perspective of a telecom organization operating across 35 countries, with no operations in India yet, with its core engineering function led from here for 15 years. In his experience, the clearest marker of a mature GCC is whether global leadership roles sit in India.

Execution has long been delivered from here, he noted, and the real transformation lies in leaders based in India taking on global responsibilities and driving change. He illustrated this with his own team, which leads the design of sovereign solutions for UK customers at a time when European demand for sovereign data and processes continues to grow.

He also shared examples of a consultancy whose country head leads a global AI center of excellence from India and of European customers whose decision makers are now based here.

Regulatory constraints are increasing, he acknowledged, but so are regulatory harmonies. Looking ahead, he doubted that the term "GCC" would last beyond India. With 90% of Colt's processes based here, he sees India not as a captive but as an extension of the organization, functionally aligned with the whole. With a smile, he suggested the summit itself may one day be named something else.

Vivek Gaur





CLOSING TAKEAWAY

The panel arrived at a shared message: GCCs must move from service delivery to value creation, supported by a curious and digital mindset, a stronger leadership pipeline, sound governance, tax and regulatory clarity, and joint investment in AI infrastructure.



JAPAN PANEL KEYNOTE

*Building the Infrastructure Backbone for India's
GCC Growth, Kochi's Case*



MR. ABDUL REHMAN

Director & COO

Lulu IT Parks

Mr. Abdul Rehman, Director and Chief Operating Officer of Lulu IT Parks, presented the Lulu Group, a global retail conglomerate with a presence in 27 countries, as a committed infrastructure partner for India's GCC ecosystem. Addressing the Japan Panel, he noted that Japanese enterprises, known for their emphasis on quality, precision, and long-term partnerships, would find in Kochi a natural fit for their India expansion plans.

Rooted in Kerala, its IT parks arm serves as an infrastructure partner for the GCC community, built around employee experience and offering fully managed, plug-and-play offices. Its campuses, designed like five-star hotels, include a 4-lakh sq ft project, a 1-million sq ft campus, and the 153-meter Lulu IT Twin Towers, South India's tallest. This LEED Platinum campus features the world's largest robotic parking system, a 2,500-seat food court, a 600-seat auditorium, a crèche, wellness facilities, three acres of greenery, and a helipad and already hosts around 6,000 employees.

IBM anchors its AI hub in Cyber Tower 2. Lulu invests in client fit-outs, including ₹120 crore for one tenant, recovered through five-year rentals, and offers scalable units for firms testing tier-two markets. For Japanese companies exploring India for the first time, he said, this model lowers entry barriers, allowing them to begin small and scale as confidence grows.

For Kochi, he cited annual office absorption of over a million sq ft, the country's ninth-largest talent pool with 1.1 lakh-plus IT professionals, strengths in AI and healthcare technology, attrition of about one-fifth of Bengaluru's, and the presence of IBM, Cognizant, TCS, Wipro, and HCL. Kerala's GCC boilerplate offers six months of free incubation, alongside a new IT policy with fiscal incentives.

Lulu offers to mediate with the government. Connectivity includes India's only state-run water metro and Metro Phase Two by December 2026. Kerala has 43 GCCs, targeting over 100 within two years, and Lulu offers both SEZ and non-SEZ space.

Concluding his address, he extended an invitation to Japanese businesses to make Kochi their gateway to India's GCC story, with Lulu IT Parks as their on-ground partner.

Abdul Rehman



JAPAN PANEL

Opportunities and Challenges for Japanese Corporations



*India's Emergence as an Innovation-Led Global R&D Hub
and Offshore Service Delivery Centre, and the Prospect of
Japan-India Co-creation in the Era of AI*

RYO UMEZAWA

Vice President - India, Mercari Inc.

MODERATOR

Ryo Umezawa, who represents Mercari, a customer-to-customer marketplace operating in Japan and the USA, opened the session with warmth and good humor, sharing that he was beginning his forties at such a wonderful event.

He introduced each panelist and then set the context with a significant milestone: 2027 will mark the 75th anniversary of India-Japan relations, and the Prime Minister of Japan's recent visit to Delhi resulted in an agreement for around \$68 billion of investment from Japan into India. Government and industry alike, he noted, are showing strong interest in GCCs.

Building on the earlier country sessions, he focused the discussion on what is distinctive about Japan, including its challenges. His questions moved thoughtfully from manufacturing to technology, marketing, startups, governance and scale, and then to the central theme: how India can move beyond the cost center to become an innovation hub. He also turned to talent, asking how Japanese companies can attract India's best professionals in competition with American and European big tech.

Ryo Umezawa



PROF. JUNYA UEDA

CEO & MD, TPR Autoparts

SPEAKERS (JAPAN)

Representing TPR Autoparts, a tier-one automotive parts manufacturer, Ueda-san shared 11 years of experience in India, along with earlier roles at Kubota, Daimler-Benz, Goodyear, and Toyo Seikan, where he was involved with GCCs from their earliest stages to more advanced ones.

He candidly acknowledged that Japanese companies are behind on GCCs, though he believes this is a good time to change. Japan began outsourcing in the early 2000s, largely to China because of linguistic similarity, but data privacy and other issues led many firms to bring work back. Today, tools from Google, Microsoft, and OpenAI mean language is no longer a barrier, which he sees as a real opportunity.

He likened Japan's GCC maturity to the "2G or 3G" stage, yet noted that, as India leapt ahead in mobile networks, Japan could advance quickly, helped by the collaboration that began in 2014 between Prime Minister Modi and Mr. Shinzo Abe. India offers vast talent and a market of scale, so firms can develop and execute locally, as Maruti Suzuki's development center shows. Automotive makes up 47% of manufacturing, while semiconductors, data centers, and petrochemicals are growing, and he shared that he will soon move to a new company as country head for India and South Asia.

Prof. Junya Ueda



SABURO TAKAHASHI

Founder & CEO, StratAspire Holdings

SPEAKERS (JAPAN)

Saburo Takahashi, founder and CEO of StratAspire, introduced a senior-led technology team and a physical AI lab that helps Japanese companies move quickly from proof of concept to MVP, enabling headquarters to make swift decisions. He founded the firm about two years ago and has lived in India for four years.

Responding to the question of technology challenges, he observed that Japanese IT companies have traditionally treated the Philippines and Vietnam as centers of offshore operations, and he felt that this thinking needs to change. What Japan should expect from India is different: co-creation and co-invention with architects, AI engineers, and data scientists, rather than the task execution expected of offshore teams.

Looking at strategy, he emphasized that India should be treated as a core creator, not a vendor, with outcomes measured rather than headcount. In physical AI especially, Japan's hardware must be paired with India's AI talent in one loop, moving from proof of concept to MVP and a testing environment within a short period, using small teams. This positive loop, he said, helps Japanese headquarters decide quickly, and it is what he hopes to see flourish.

Saburo Takahashi



TEPPEI YAMASHITA

Managing Director, K&L Communications, India

SPEAKERS (JAPAN)

Teppei Yamashita, Managing Director of KNL Communications India, represents a marketing and communication solutions provider that has supported Japanese enterprises outside Japan since 1963, with about 20 years in India and nine years of his own experience here.

Speaking from the marketing and branding perspective, he agreed that Japanese enterprises have been slow to embrace GCCs, but he now sees a strong boost of hope and willingness to enter India. He warmly endorsed Takahashi-san's word "co-creating," since values created together in India become value for the global market.

Japanese companies, he suggested, should proudly communicate their GCC activity in India, as it becomes a genuine marketing and branding asset. On talent, he graciously acknowledged that Japanese firms may trail American and European companies in salary and work culture, yet the sense of family, relationship, and camaraderie they offer is a real strength.

To attract talent, branding must be localized: adapt language, attitude, and culture; work with media such as the Times of India and the Economic Times; join events like this summit; and invest in human connection. KNL has followed this approach for decades, believing that understanding India is key to engaging its young talent.

Teppei Yamashita



SHOZO KAMIYA

Founder & CEO, I'mbesideyou, Japan

SPEAKERS (JAPAN)

Shozo Kamiya, founder of the AI startup I'm Beside You, lives in Silicon Valley while most of his team is in India, delivering cutting-edge AI solutions to Japanese enterprises through Japan-India-US collaboration. Having previously worked at NTT DATA with tens of thousands of Indian colleagues, he explained that a startup cannot hire at that scale, so the capability and agility of each person become critical.

India, with the world's largest population and about 1.5 million new IT engineers each year, offers many top-1% engineers, and he believes Indian engineers are the best in the world. His own team members are all IIT graduates. His approach to hiring was heartfelt. He held placement talks at 34 IITs and IIMs, which drew 13,000 internship applications. He visited each team member's home, met their parents, and shared dinner, building trust and psychological safety, which is especially valuable when parents ask why their children are not joining Google or Microsoft.

The company is fully remote, with members across Japan, the United States, and cities throughout India, yet the team meets in person for a week every three months in Japan and India. He believes this is the best way to build India-Japan collaboration and mutual understanding of cultures.

Shozo Kamiya



DEEP PRAKASH PANT

Head of GCC Practice, NTT Data

SPEAKERS (JAPAN)

Describing himself as "Indian by body and Japanese by heart," Mr. Deep leads the NTT DATA practice in India, part of a 120-year-old, \$130 billion conglomerate with a \$30 billion IT business. In India for nearly 40 years, NTT DATA has 60,000 people across nine cities, serves almost 500 GCCs, and has invested \$1.5 billion in core infrastructure, including 30 data centers and undersea cabling.

He noted that Japanese firms built strong manufacturing in India for the Indian market since Suzuki's arrival in the 1980s, but headquarters lacked the line of sight to place mission-critical operations here, owing to trust and language barriers.

Today, there are roughly 180 to 190 Japanese GCCs employing 190,000 people, expected to reach about 300 GCCs and 350,000 people by 2030. AI language models now ease the language gap, allowing a core of 20% Japanese-speaking staff with 80% AI-assisted teams. The APAC arbitrage is about 30% versus 60% for North America, so Japanese firms are co-locating GCCs, R&D hubs, and plants to build and stress-test use cases such as telemetry, connected cars, and ADAS.

To scale, he named three priorities: a hybrid Indo-Japanese culture, Japan's strengths in Kaizen and TQM, and impact at scale, delivering "global impact at local cost."

Deep Prakash Pant





CLOSING TAKEAWAY

The panel shared a hopeful message: Japan, a late mover, can advance quickly by treating India as a co-creator rather than a vendor, blending cultures, using AI to dissolve language barriers, and pairing Japanese hardware and manufacturing excellence with Indian talent to create technologies for the world.



EU PANEL KEYNOTE

*What Europe and India Can Build Together:
From Trade to Co-creation*



MS. ÖZLEM BURAN

*Head of Secretariat,
EU-India Digital Policy Dialogue*

Bringing the European perspective, Ms. Ozlem Buran posed a defining question: not what Europe and India can trade, but what they can build together. With the Towards 2030 Joint Comprehensive Strategic Agenda setting political direction and the concluded free trade agreement providing the commercial framework, she urged that the FTA be treated as an enabler rather than a finishing line, noting its digital trade chapter and projected 41% to 65% uplift in bilateral trade.

Retiring the outdated notion of "Europe designs, India delivers," she observed that India's 2,100-plus GCCs employ 2.36 million professionals and generate about \$98 billion in revenue, with nearly half managing products end to end. Co-creation, she argued, requires cross-border digital services, predictable talent mobility, strong intellectual property protection, trusted digital infrastructure, and compatible standards, enabling India and Europe to move from standard takers to standard shapers.

Investment, she added, builds capability: some 6,000 European companies already generate €186 billion in turnover in India, and she pointed to next-generation GCCs, industrial digitization, deep tech, clean technology, and digital public infrastructure as priority destinations. She closed with three propositions: treat both regions as platforms for building global businesses, regard the modern GCC as part of a company's brain and not merely its hands, and measure concrete outcomes by 2030.

Ozlem Buran



EU PANEL

Co-creating the Next Generation of Global Corporations



*The EU's Industrial and Technological Excellence
and India's Talent, Scale and Digital Innovation: A
New Chapter under the India-EU FTA*

SANDEEP KULKARNI

Sr VP & Head GCC, Worley Enterprises

MODERATOR

Mr. Kulkarni opened the session with warm appreciation for the organizers, noting that this was his second year at the summit: last year was a success, and this year, he said, was amazing.

He welcomed a panel that reflects a mix of industries, not only technology, AI, or manufacturing, and linked the discussion to the strategic framework and the FTA concluded between the EU and India.

He proposed that the FTA is better understood as a partnership, and that partnership happens between equals. Pierre had reservations about the wording of the session title, and Sandeep graciously accommodated them, affirming that design might happen in the EU and implementation in India, or the reverse, but that the real value lies in building products together for the global stage.

He then guided the panel through personal journeys, the FTA's practical impact, cross-cultural integration, talent and student mobility, and Kochi as a tier-two destination. With lunch awaiting, he closed with a round-robin question: What one challenge should both sides address together to make the relationship work to its fullest? He thanked the panel for an open and honest discussion.

Sandeep Kulkarni



PIERRE-ARNAUD CASSIN

CEO and MD, Ultraconfidentiel Design

SPEAKERS (EU)

Pierre shared that he wears two hats. He leads an architecture, design, and construction company in India, founded 19 years ago, which builds offices, GCCs, luxury retail, hotels, and commercial spaces for multinational and domestic clients.

He also represents the French Foreign Trade Advisors, a network of 4,500 CEOs worldwide, including 72 active members across ten Indian cities, who advise the French government, help French companies set up in India, and support Indian companies investing in France.

At the outset, he candidly said the title's suggestion of equal-to-equal business sounded dated and that a win-win partnership should not begin with talk of superiority. Reflecting on why India, he admitted that he was once clueless, since India's potential was far less visible fifteen years ago, but he is now convinced he is in the right place at the right time.

He pointed to the momentum of official visits, including executive committee visits from top French companies this month and President Macron's third visit, noting that the relationship is a real friendship. His closing concern was talent: it remains difficult to hire and retain, and as AI reshapes workflows, India urgently needs to add value so that jobs are preserved.

Pierre-Arnaud Cassin



YAN GARIN

Country Head & Director, Ecole Intuit Lab

SPEAKERS (EU)

Yan, who has lived in India for 20 years, shared with good humor that he originally came for love: his wife is Indian. He now manages École Intuit Lab, a French institute of design with campuses worldwide, whose most important market is India, with four campuses in Mumbai, Kolkata, Delhi, and Bangalore.

The institute has been in India for 15 years, and he has managed it for 14. On student mobility, he emphasized that studying abroad is not tourism but immersion. Students should go abroad when the experience adds a skill or perspective that cannot be found at home.

Since subjects and information are now accessible everywhere, what differs is the way a problem is approached, and in a creative field, the value lies in a fresh angle rather than an existing formula. He also stressed faculty mobility: faculty trained to a global standard must themselves speak a global language, so the institute insists that they have experience living abroad.

His closing wishes were practical: shorter visa delays and, above all, more interaction between industry and academia. He urged businesses to come directly into classrooms and teach, rather than waiting for graduates and then lamenting that they are insufficiently trained.

Yan Garin



MATHIEU JOUVE-VILLARD

Managing Partner, Wedge Consulting

SPEAKERS (EU)

Mathieu, who has lived in Delhi since 1994 and describes himself as almost a Punjabi, has spent 25 years advising foreign companies on strategy, market research, and partnerships. He is the director of the French bank Crédit Mutuel CAC and a partner at the consultancy Wedge.

In 2017, he published a book in France on negotiating with Indians, after seeing promising projects end in court or fail simply because of cultural misunderstanding. Today he specializes in cross-cultural consulting, coaching, and training for Indian and foreign teams, with practical tools. In his view, cross-cultural issues are a major soft obstacle that most companies neglect, affecting productivity, quality, trust, and turnover.

He observed that Indian culture is anxiety-generating, with pressure from work, society, and family, and that understanding this reframes behavior as a legitimate concern rather than disrespect. The task is to foster psychological safety, because people can change only when they feel safe and have the right to try and fail.

His closing message was that the stereotype of GCCs as back offices persists, and he urged European firms to give cross-cultural issues dedicated time and resources, since if you don't deal with culture, culture will deal with you.

Mathieu Jouve-Villard



NEVIN ASLAN-OZKAN

Managing Director and CFO, Continental Tires India

SPEAKERS (EU)

Nevin, who has been in India for one and a half years, represents Continental, a company that has been present here for far longer. He described the FTA as one of the biggest agreements ever signed, with the potential to reshape relationships between countries, corporations, and institutions. It will move business beyond buying and selling toward investing, innovating, and building together.

He identified opportunities in trade, where tariffs will be eliminated or reduced and procedures simplified; in investment, where broader market access will benefit EU companies in India and Indian companies abroad, supported by protection and certainty that improve planning security; and in collaboration.

Most important, he said, is the mindset of building something together, in which people, companies, and institutions can move, talent and knowledge travel but remain protected, and growth follows naturally. Answering the closing question, he spoke from a corporate vantage point: companies, particularly Indian ones, must move from cost competitiveness to value competitiveness.

Talent, know-how, operations, and quality must be elevated to the next level; otherwise, the growth that lies ahead cannot be captured.

Nevin Aslan-Ozkan



BONNY M AVANOOOR

Country Head Leasing, Lulu IT Park

SPEAKERS (EU)

Bonny, representing the Lulu Group, which is headquartered in Kochi, noted that his colleague Abdul had presented earlier. While the group runs malls across the world, its office-space business is based only in Kochi, Kerala.

He described himself as having been in India since birth, 43 years, though across different markets, and good-humoredly called himself the odd one out as the enabler on a panel of practitioners. His point was clear: once companies decide to establish themselves in India, they choose between tier-one and tier-two cities, and for a tier-two strategy, Kochi offers a compelling option.

He cited IBM, EY, and UST as examples of firms that have done well there. With the EU-India bridge now being closed, he expects many more companies to arrive, and Lulu and other infrastructure providers will be the place where they are housed.

He closed, in the spirit of the discussion, by reframing the talent question as an opportunity rather than a challenge: academia must match industry, from school through college, so that companies hire ready talent rather than retraining it.

Bonny M Avanoor





CLOSING TAKEAWAY

The panel converged on a shared message: the India-EU relationship should be a partnership of equals focused on building together, supported by trade and investment access under the FTA, a shift from cost to value competitiveness, serious attention to cross-cultural integration and psychological safety, mobility of people and knowledge, and closer industry-academia collaboration.



FROM INSIGHT TO IMPACT

INDUCTUS

— INDIA'S LEADING GCC ENABLER —



GCC INDUSTRY REPORT



The Global GCC Summit 2026 report, produced by Inductus Limited, explains why India has become the default location for Global Capability Centers (GCCs) and Offshore Service Delivery Centers (OSDCs), and what enterprises need to know to build and scale one. Written for boards, CEOs, global capability leaders, CFOs and investors, it moves from history to market size, geography, workforce, sectors, AI, national impact, the business case, policy, risks and the outlook to 2040.

The story begins in 1973, when Western firms short of programming talent at home began sending COBOL and mainframe work to Indian vendors. Over the following decades the relationship deepened in stages. Citibank and Texas Instruments built the first captive centers in the mid-1980s, bringing IP and process ownership in-house. Shared services followed in the late 1980s and 1990s, when American Express, Swissair and GE Capital showed that finance and operations could run from India at enterprise scale.

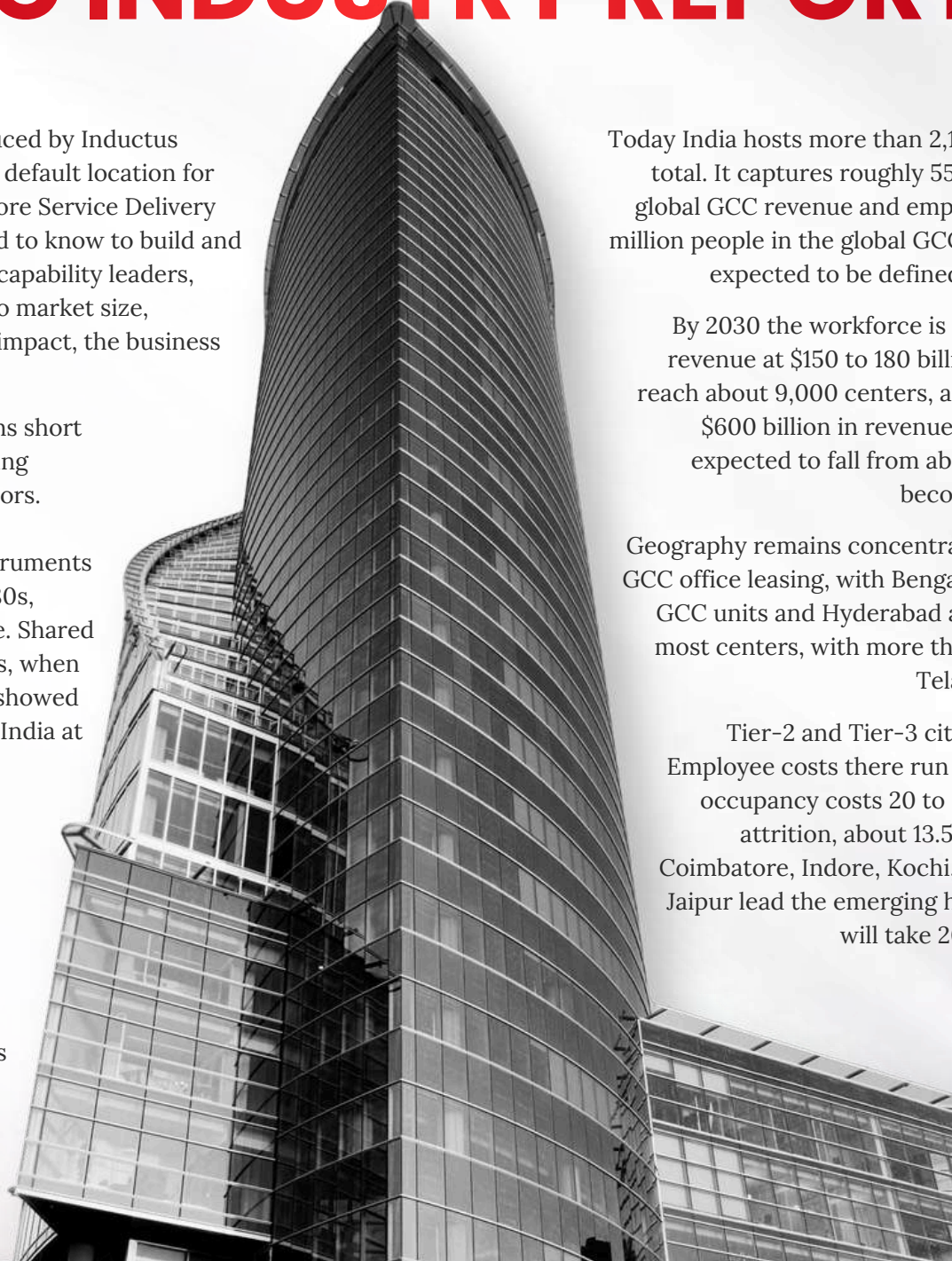
The 2000s and 2010s brought rapid growth, but also a drift: many centers, though captive on paper, were still managed like transactional vendors and measured on headcount and cost per transaction. The report presents the shift toward capability-first OSDCs as a correction of that drift, with the client owning the business, process and governance while the India-based partner builds and runs the capability.

Today India hosts more than 2,110 GCCs, about 53% of the global total. It captures roughly 55% of an estimated \$98.5 billion in global GCC revenue and employs about 45% of the roughly 2.4 million people in the global GCC workforce. The growth ahead is expected to be defined by value rather than headcount.

By 2030 the workforce is projected at 2.5 to 3.5 million and revenue at \$150 to 180 billion. By 2040 the ecosystem could reach about 9,000 centers, around 8 million professionals and \$600 billion in revenue. Average workforce per center is expected to fall from about 1,050 to about 900 as centers become smaller and more specialized.

Geography remains concentrated. Tier-1 cities still take 94% of GCC office leasing, with Bengaluru alone accounting for 36% of GCC units and Hyderabad another 22%. Karnataka hosts the most centers, with more than 950, followed by Maharashtra, Telangana, Haryana and Tamil Nadu.

Tier-2 and Tier-3 cities offer a compelling alternative. Employee costs there run 10 to 35% below Tier-1 levels and occupancy costs 20 to 50% lower, with noticeably lower attrition, about 13.5% against 22.5% in Tier-1 metros. Coimbatore, Indore, Kochi, Visakhapatnam, Ahmedabad and Jaipur lead the emerging hubs, and the report projects they will take 20 to 30% of new centers by 2030.





The workforce is young and growing more experienced. Millennials make up 55% of GCC staff and Gen Z 38%, and hybrid work is the preferred model across every generation. Career growth, at about 78%, and job satisfaction, at about 72%, outrank salary as drivers of job change, while immediate salary hikes rank last at about 21%.

GCC roles pay a premium of roughly 40 to 72% over comparable IT services roles, depending on function and experience. Hiring is also shifting toward seniority: mid-to-senior professionals rose from 63% of hires in 2023 to 77% in 2025. Women make up an estimated 40% of the GCC workforce in 2025 and are projected to reach about 44% by 2030.

Technology accounts for roughly half of GCC employment, with BFSI next at around a fifth, followed by automotive and manufacturing, healthcare and life sciences, and retail and consumer goods. Growth is strongest where AI meets domain work, from fraud and risk analytics in banking to software-defined vehicles in automotive and AI-led drug discovery in healthcare.

North American headquarters remain the largest source of GCCs, European BFSI is the fastest-rising segment, and sustainability-focused centers are the fastest-growing vertical, driven by EU reporting rules such as CSRD.

The report treats AI as an inflection point. Adoption across GCC functions is projected to reach 70 to 90% by FY2030, and daily employee AI use is expected to climb to about 78%. Productivity gains of 25 to 50% are expected by 2030, rising to 50 to 70% in organizations running autonomous, AI-driven operations.

That transition brings a large reskilling task, with about 60% of the talent base needing upskilling, and a rise in net new AI-specific roles from about 85,000 to about 310,000. Innovation is keeping pace: India recorded a record 110,375 patent applications in FY2024–25, and resident filers account for about 62% of them.

The sector's economic weight is significant. GCC revenue is estimated at about 2.3% of India's GDP in FY2026 and is projected to reach 4.29% by FY2040. Including supply-chain and consumption effects, the total footprint is estimated at \$255 to 263 billion, or about 6.2 to 6.4% of GDP.

That footprint is larger than the combined gross value added of 25 states and union territories. Tax contribution is growing quickly too, from about ₹2.02 trillion in FY2026 to about ₹3.67 trillion in FY2030, a compound growth rate of about 16%.



The cost case remains the starting point, and the report makes it concrete. A 100-person AI and engineering team costs about \$5 to 6 million a year in Bengaluru, against \$16 to 18 million in San Francisco, a gap of \$10 to 12 million annually. In a Hyderabad model of a 100-person GCC, cumulative savings overtake the investment around Year 3 and reach about \$16 million by Year 5.

Setup depends on scale. A pilot of 15 to 50 staff through an employer-of-record model can cost \$200,000 to \$500,000 and take 6 to 12 weeks to stand up, while a mega GCC of 500 or more staff needs \$3 to 8 million and a build-out of 5 to 9 months.

Policy has moved in the same direction. The Union Budget 2026–27 raised the safe harbour threshold for GCCs and IT services from ₹300 crore to ₹2,000 crore, with a uniform 15.5% operating margin. This extends transfer-pricing certainty to large, mature centers for the first time.

Other reforms include rationalized minimum alternate tax, faster advance pricing agreements, restored zero-rating of IT and ITeS exports under GST, and a committee formed in March 2026 to overhaul the SEZ Act. SEZ exports reached \$172.3 billion in FY2024–25, up from \$102.3 billion four years earlier.

States are competing as well, with Karnataka, Telangana, Maharashtra, Gujarat and Uttar Pradesh, among others, offering dedicated GCC policies with capital subsidies, rental and payroll support and talent programs.

Beneath the growth the report identifies several cracks in the foundation. Talent is the most acute: a reported 90% shortage of GenAI-ready professionals, a national AI skill deficit of about 53% and scarce cloud-native expertise.

AI talent commands a 40 to 60% salary premium, and AI and ML pay is inflating by 18 to 25% a year. Attrition averages about 16% across GCCs and reaches 18 to 25% in AI and cloud roles, where average tenure has shrunk to 18 to 24 months.



Concentration adds risk, since Bengaluru holds about half of India's AI and ML talent. Leadership is the final gap: about 80% of GCCs have fewer than 10% of their leadership roles based in India, even as global leadership roles in Indian centers grow by nearly 40% a year.

Looking to 2040, the report expects strategic mandates in AI governance, IP creation and R&D to rise from about 25% of GCCs in 2025 to about 45%, and compact "Nano GCCs" of 10 to 150 specialists to become common. Mid-sized enterprises are expected to run around 80% of centers by then.

The roadmap begins with Tier-2 expansion and the first Nano GCCs by 2027, reaches a \$150 to 180 billion ecosystem with 20 to 30% of new centers outside the metros by 2030, and sees strategic mandates overtake delivery in value by 2035.

The report also catalogs how GCC excellence is recognized, across workplace culture, diversity and inclusion, innovation, global capability and ESG and safety. Such recognition helps centers attract talent, strengthens the case for investment with global headquarters, and reduces the perceived execution risk for companies considering India.

The report closes on a clear message: India's GCC ecosystem has moved from cost arbitrage to capability, and the OSDC model gives enterprises ownership of outcomes without building a captive. The next phase depends on deeper specialist talent and leadership pipelines, diversification beyond Tier-1 hubs, and governance that treats centers as strategic partners rather than transactional suppliers.





A Definitive Milestone

THE LAUNCH OF



IRRESISTIBLE
INDIA

— INDIA'S LEADING GCC ENABLER —





IRRESISTIBLE INDIA AWARDS





Mr. Ramesh Thamotharan

Recognized for steering Illumina's India GCC as a global operations hub
for med-tech and genomics innovation.

Med-Tech GCC Leader of the Year 2026

GCC Site

Head & Director-

Global Operations

Illumina GCC





Mr. Ashish Gupta

Honored for leading technology at Carelon Global Solutions India and moving the GCC from service delivery to owning global products and IP.

**Excellence in
Global IP & Product
Ownership**

MD - Tech

**Carelon Global
Solutions India**





Mr. Ganesh Kashyap

Awarded for boosting and leading Landis+Gyr India as a strategic, high-impact extension of the company's global business.

**GCC of the
Year 2026**

CEO

**Landis & Gyr
India**





Ms. Kavita Mehra

Recognized for her leadership in GCC sales and strategy at Dell Technologies India and as a role model for women in the GCC ecosystem.

GCC Women Leader of the Year 2026

*Director- GCC Sales &
Strategy India*

**Dell
Technologies,
India**





Mr. Wasim Mansuri

Honored on behalf of the State of Gujarat for building the digital and e-governance foundation that is making it a rising GCC destination.

Rising GCC Destination of the Year 2026

*Joint Director (IT),
Directorate of ICT &
E-Governance,
Government of Gujarat*

State of Gujarat





Mr. Sandeep Kulkarni

Honored for taking Worley Enterprise Services beyond support to strategic ownership, making the GCC a core driver of Worley's enterprise capability and global growth.

**GCC Leader of
the Year 2026**

*Senior Vice President
& Head GCC*

**Worley
Enterprise
Services (WES)
– Worley**





Mr. Vivek Gaur

Awarded for building Colt India's engineering center into an engaging, people-first workplace.

GCC Workplace of the Year 2026

*Vice President of Engineering,
Colt Technology Services,
Country Head & MD of Colt
India*

**Colt
Technologies
Services & Colt
India**





Mr. Deep Prakash Pant

Recognized for leading NTT Data's GCC practice and helping global enterprises build technology- and innovation-led centers in India.

**GCC
Tech Innovation
of the Year 2026**

Head of GCC Practice

NTT Data





Mr. Abdul Rehman

Honored for developing the IT park infrastructure through Lulu IT Parks that GCCs need to set up and scale in India.

**Excellence in
Commercial
Real Estate – IT
Parks**

Director & COO

Lulu IT Parks





Our Partners

To our esteemed sponsors, your partnership is the cornerstone of the Global GCC Summit 2026 by Inductus Group, taking place on 25 September 2026 at the Hyatt Regency, New Delhi. As we convene industry leaders under the theme “Architecting India’s Sunrise Era” to shape the \$980 billion GCC economy, your support as a Tech, AI Talent, Infra, State, Knowledge, and Banking partners positions your brand at the heart of the GCC revolution. Thank you for helping us drive India’s GCC 4.0 future.

STATE PARTNER 	INFRA PARTNER 	TECH PARTNER  	
ECOSYSTEM PARTNER 	BANKING PARTNER 	AI TALENT PARTNER 	KNOWLEDGE PARTNER 



STRATEGIC PARTNERSHIPS



Department of Science & Technology
(Government of Gujarat)

Inductus Group has entered into a strategic collaboration with the Department of Science and Technology, Government of Gujarat, to support the state's ambition of emerging as a leading destination for Global Capability Centres (GCCs) and a robust IT ecosystem. The collaboration brings together Gujarat's strengths in skilled talent, modern infrastructure, and quality of life with Inductus Group's expertise in GCC and IT consulting, location strategy, investment facilitation, and engagement with multinational corporations. Through this association, Inductus aims to promote Gujarat among global enterprises, highlight its investment potential, and support efforts to attract GCC establishments and expansions, contributing to the development of a competitive, attractive, and sustainable technology ecosystem in the state.



Infoparks Kerala

Inductus Group has formalised a strategic partnership with Infoparks Kerala to support the state's vision of becoming a preferred destination for Global Capability Centres (GCCs) and IT investments by global enterprises and multinational corporations. Under this partnership framework, Inductus will leverage its global corporate network and expertise in GCC consulting, location strategy, and investment facilitation to promote Kerala's competitive advantages, facilitate investor connections, and encourage sustainable GCC establishment across key cities in the state.



INDUCTUS SERVICE MODELS



BOT Model

(Build, Operate & Transfer)

Inductus GCC's Build-Operate-Transfer (BOT) model enables global enterprises to establish a Global Capability Center in India with precision and complete strategic control. We architect your GCC from the ground up, embedding robust process control and data integrity, and operate it seamlessly until you are ready to take full ownership. Backed by India's talent pool of 4 million professionals and cost efficiencies of up to 70% lower than Western markets, the BOT model delivers a battle-tested, fully optimized setup that is transitioned to you, ensuring long-term agility and a lasting competitive edge.



BOT (Build-Operate-Transfer)

What We Offer / Deliverables

- 
01 | Architecting the GCC from scratch, a custom-built setup in India
- 
02 | Process control and data integrity embedded from the start
- 
03 | Operating the center seamlessly until the client is ready
- 
04 | Transferring full ownership to the client, with a fully optimized, battle-tested infrastructure
- 
05 | BOT 2.0 turns "Transfer" into "Transform": innovation, capacity building and IP retention from day one, and the center can evolve into a Global Innovation Centre
- 
06 | Talent is hired under the client's own brand, with KPIs and governance shared between both sides

Benefits of Choosing BOT

- 
01 | Cost savings of 40-60% (per the blog), while the main page says up to 70%
- 
02 | Ownership of talent and team
- 
03 | Full control over operations, processes and KPIs
- 
04 | Faster market entry, since there are no subsidiary-setup delays
- 
05 | Full control over data and IP
- 
06 | Typical timeline of 12 to 24 months



COPO Model

(Company-Owned, Partner-Operated)

Inductus GCC's Company-Owned, Partner-Operated (COPO) model lets you retain 100% ownership of your Global Capability Center while we take over the operational complexity. We deploy pre-built, mirrored systems for rapid launch and bring in cutting-edge technology and niche skills, all while safeguarding your intellectual property and compliance requirements. You drive the strategy and we orchestrate the execution, giving you scalability, speed, and operational excellence without the heavy CapEx burden.





COPO (Company-Owned, Partner-Operated)

What We Offer / Deliverables

-  **01** | Rapid launch using pre-built, mirrored systems
-  **02** | Cutting-edge tech and niche skills infused into the setup
-  **03** | IP protection and compliance safeguards
-  **04** | Operational burden (compliance, regulatory management, talent acquisition) handled by us, while the client keeps control of strategy
-  **05** | 100% client ownership of assets, infrastructure and proprietary processes

Benefits of choosing COPO

-  **01** | Up to 80% lower capex over 5 years, thanks to shared infrastructure
-  **02** | 60-70% lower operating costs, and 30% lower multi-city expansion costs
-  **03** | GCC setup in as little as 90 days
-  **04** | Operational stability in 6 months, versus about 30 months for a fully owned subsidiary
-  **05** | 40% lower risk, and a 30% drop in tax and legal liabilities



OSDC Model

(Offshore Service Delivery Center)

A dedicated operational extension of an enterprise that builds, operates, and continuously improves critical business functions through specialized talent, governance, and technology. Unlike conventional outsourcing, the client owns the business, process, and governance — while Inductus builds and strengthens the operational capability behind it.



OSDC (Offshore Service Delivery Center)

What We Offer / Deliverables

- 
01 | HR hiring, onboarding and employee records

- 
02 | Payroll accurate, compliant and on-time pay runs

- 
03 | Finance, accounting and accounts payable: bookkeeping, month-end close, reporting and invoice-to-payment

- 
04 | Workflow automation less manual effort in repetitive tasks and approvals

- 
05 | Data analysis business data turned into dashboards and insights

Benefits of choosing OSDC

- 
01 | Cost optimisation lower cost-to-serve and total cost of ownership (TCO), with SLA-backed quality controls.

- 
02 | Specialist talent access a scalable pool of skilled professionals in finance, HR, data analytics and automation, without direct recruitment overhead.

- 
03 | Follow-the-sun delivery extended operating hours and shorter turnaround time (TAT) through structured cross-time-zone handovers.

- 
04 | Governance and IP ownership client-defined scope of work (SoW), KRAs and KPIs, with full ownership of existing and newly developed IP.

- 
05 | Modular scalability phased, gated expansion from a pilot to additional functions, driven by KPI attainment.



Vote of Thanks

ALOUK KUMAR

CEO & Managing Director
Inductus Group

Media BYTES





Reach Out to us



 **Address:** C - 127, Sector 2, Noida,
Delhi NCR, INDIA

 **Email:** ho@inductusgroup.com

 **Phone:** +91 092346 92346

 **Website:** www.inductusgroup.com
www.inductusgcc.com

