

FROM GLOBAL

CAPTIVE

CENTER

TO

GLOBAL

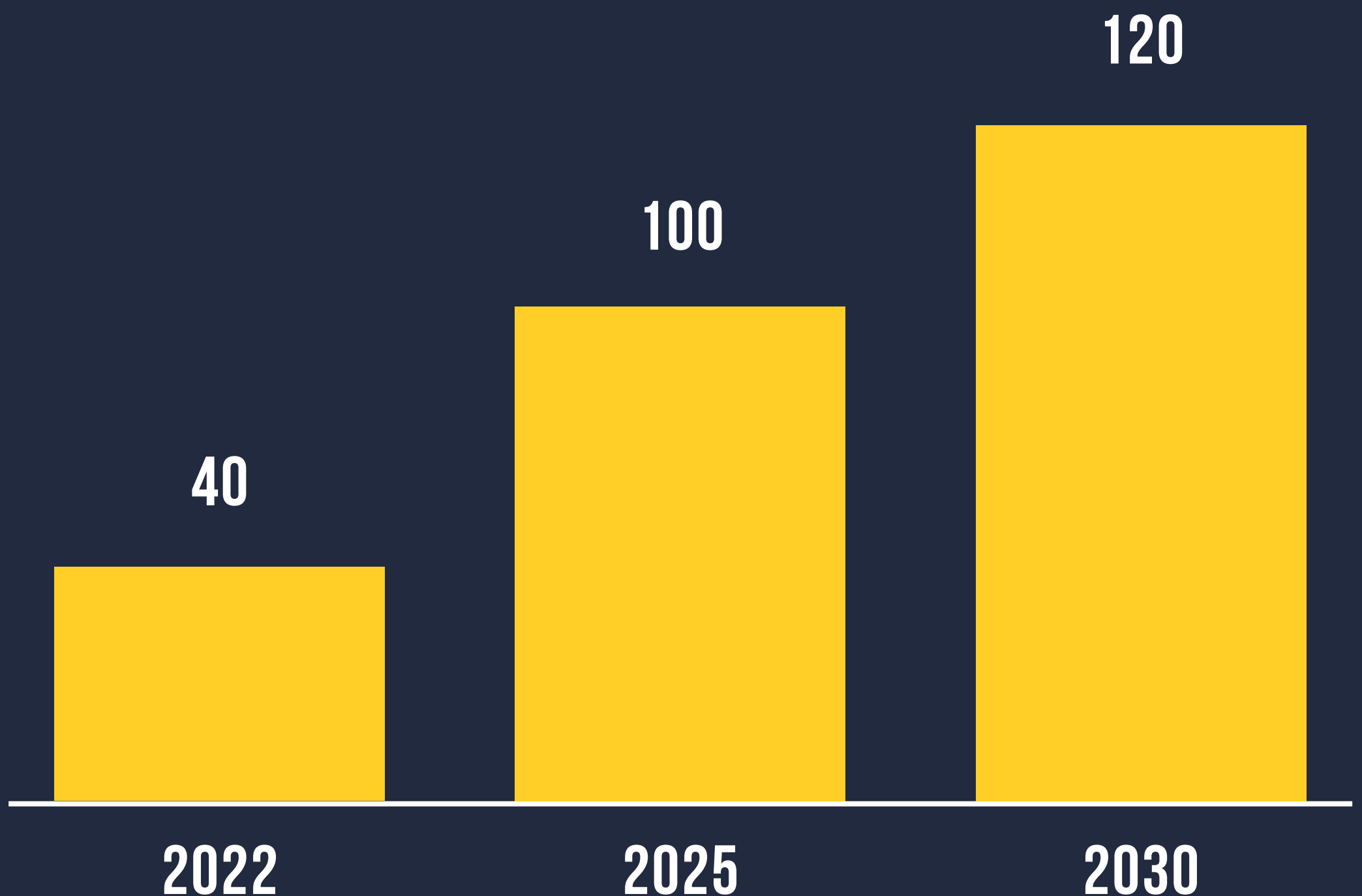
CAPABILITY

CENTER



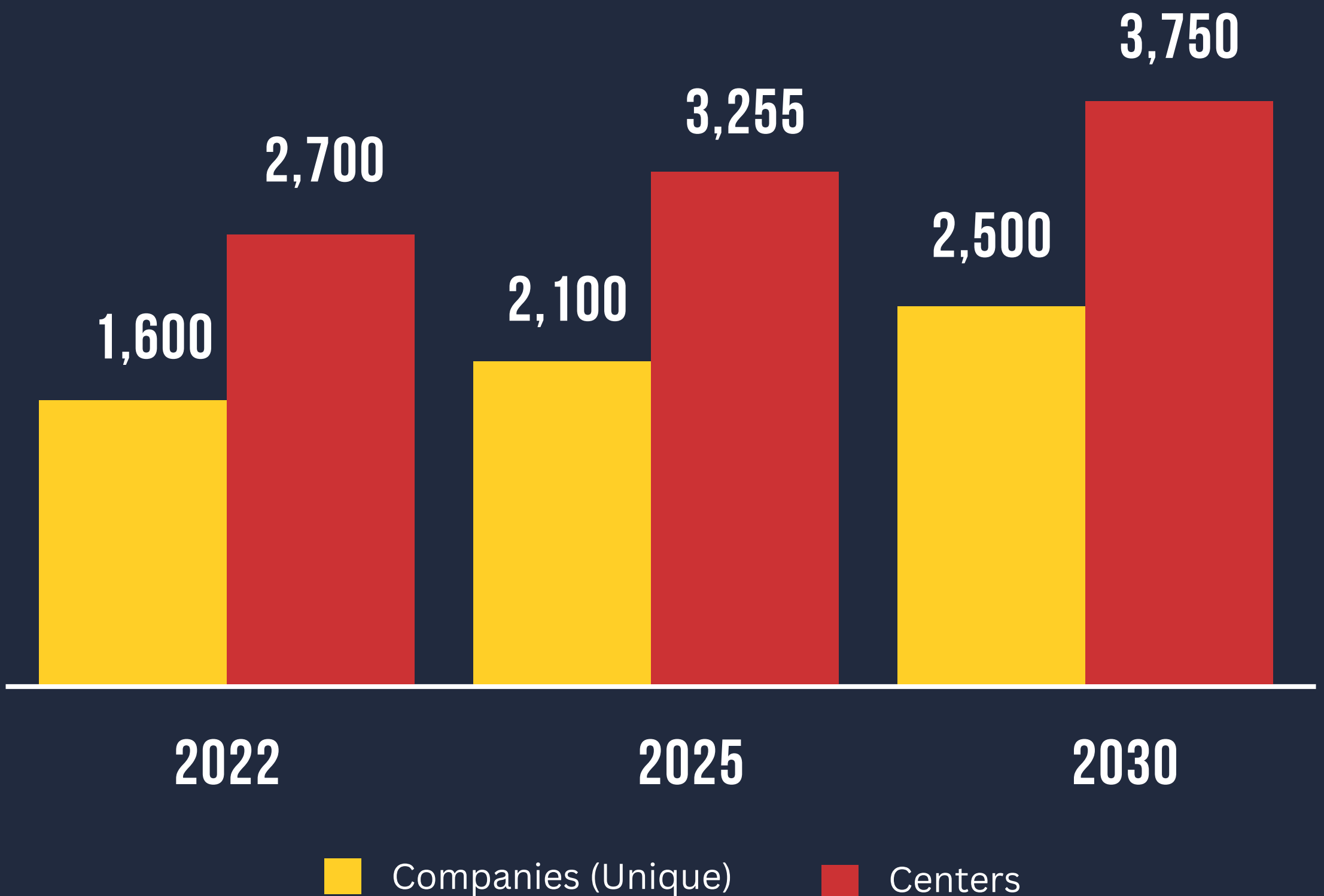
# INDIA GCC MARKET SIZE IS EXPECTED TO TREBLE TO US\$ 120 BILLION BY 2030

INDIA GLOBAL CAPABILITY CENTER (GCC) MARKET SIZE, US\$ B



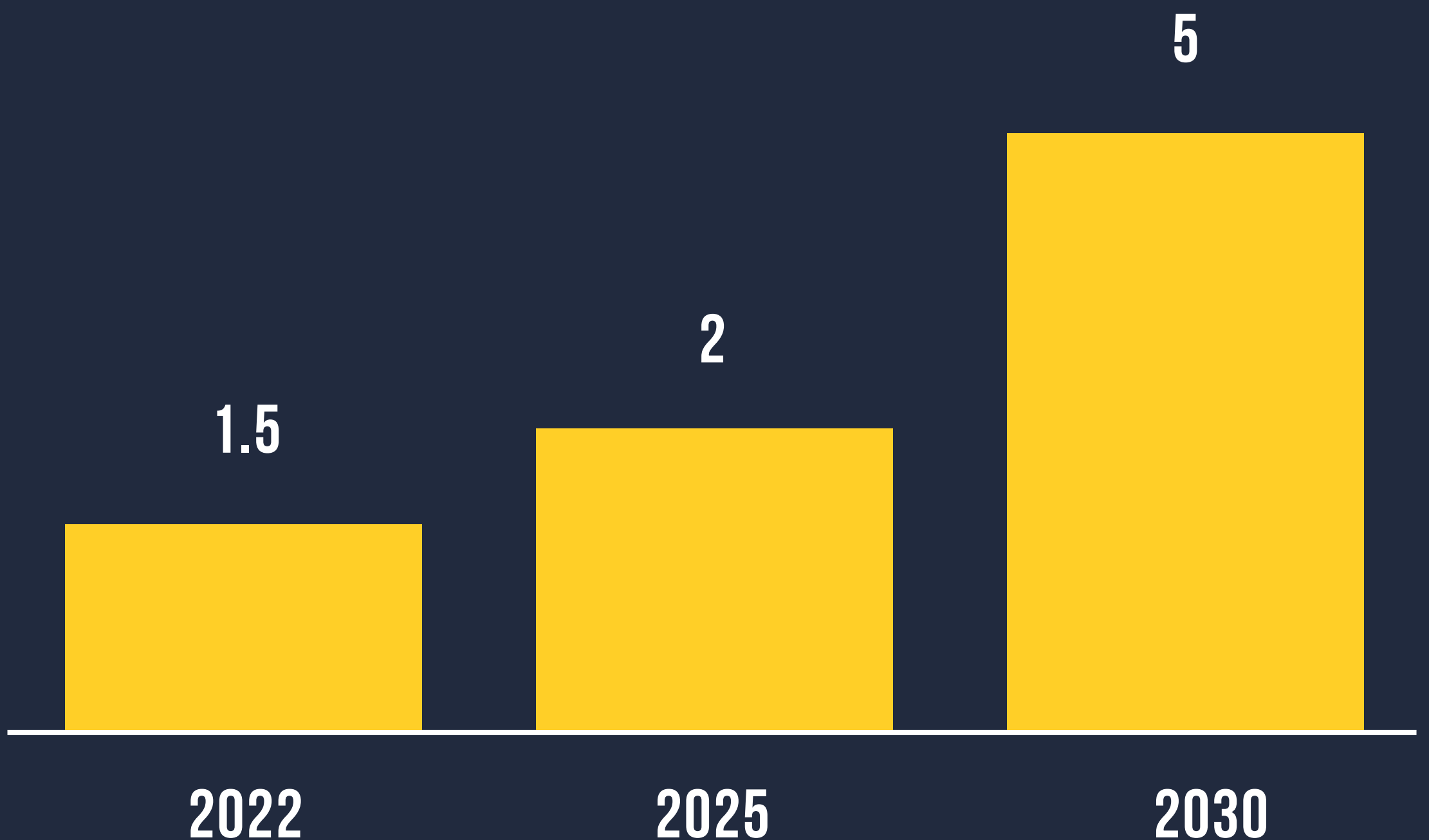
# NUMBER OF GCC ARE EXPECTED TO GROW UP TO 2500 CENTERS BY 2030

NUMBER OF GLOBAL CAPICITY CENTER (GCC) IN INDIA



**GCC EMPLOYEES ARE EXPECTED TO INCREASE BY MORE THAN THREE TIMES TO 5 MILLION EMPLOYEES BY 2030 LEADING TO BE A APPRECIABLE CONTRIBUTOR TO THE INDIA'S GDP**

**GLOBAL CAPACITY CENTER (GCC) IN INDIA, MILLION EMPLOYEES**



## ROLE OF GCC HAS CHANGED TO AN INNOVATION HUB FRONT-ENDING FUNCTIONS SUCH AS AI AND ML

TIMELINE	PAST (BEFORE 2020)	CURRENT (2022-2023)	FUTURE (2023 AND BEYOND)
ROLE	BACK OFFICE	MID-OFFICE	FRONT OFFICE
TREATMENT	COST CENTER	NON-CORE OPS	INNOVATION HUB FUELLED BY INCUBATORS AND ACCELERATORS
REASON SETTING UP GCC	COST ARBITRAGE	TECHNO-COMMERCIAL TALENT	INNOVATION AND IDEATION
FUNCTIONS	BACK-END IT CUSTOMER SUPPORT FINANCE	SUPPLY CHAIN SALES HUMAN RESOURCE R&D	ARTIFICIAL INTELLIGENCE/MACHINE LEARNING ROBOTIC PROCESS AUTOMATION MOBILITY DIGITAL

## NEW AGE GCC WILL BE DOMINANT IN THE MID-SIZE FINTECH AND PHARMA INDUSTRY

	PAST (BEFORE 2020)	CURRENT (2022-2023)	FUTURE (2023 AND BEYOND)
SIZE	GLOBAL LARGE MNC	GLOBAL LARGE MNC	GLOBAL MID-SIZE
SOURCE/ORIGIN	>90% FROM US	US: 65% EU: 35%	US: 55-60% EU: 40-45%
DESTINATION/ LOCATION	BENGALURU AND HYDERABAD	CHENNAI, PUNE AND GURGAON	TIER 2 AND 3 CITIES
MODEL	INDIVIDUAL CENTERS	MULTIPLE CENTERS	HUB-SPOKE MODEL
INDUSTRY	BFSI	BFSI, BIG TECH COMPANIES, PHARMA, BIG 4	FINTECH, PHARMA
OPERATING MODEL	BUILD-OPERATE-TRANSFER MODEL	SELLING GCC TO IT/TECH COMPANIES	GREENFIELD ROUTE
NUMBER OF SEATS PER CENTER	20-50K	10-20K	1K-5K

## DISCOVER MORE INSIGHTS...

- ▶ OPPORTUNITY FOR INDIA GCC
- ▶ CHANGE IN SCOPE AND SCALE OF WORK AT INDIA GCC
- ▶ ROLE OF TECHNOLOGY AND EVOLVING GCCS IN SHAPING UP THE BUSINESS PRIORITIES
- ▶ HOW GCC ARE HELPING COMPANIES REDUCE LEGAL SPENDING TO FUND DIGITALIZING
- ▶ REASONS FOR ACCELERATING PACE OF GCC GROWTH
- ▶ CHALLENGES FACED BY INDIAN GCCS
- ▶ LIST OF KEY GCC
- ▶ NO. OF GCC PER COMPANY
- ▶ FOCUS AREA
- ▶ KEY DECISION MAKERS

**REQUEST FULL REPORT** 