

# AI & Data GCC Landscape

## Analysis

### A Comprehensive Report

March 2026

# Table of Content

- 01 Executive Summary
- 02 Scope & Methodology
- 03 GCC Evolution: From Cost Centre to AI Hubs
- 04 Market Landscape Overview
- 06 AI & Data Capability Landscape
- 07 Company Level Intelligence
- 08 Talent & Leadership Landscape

*A snapshot of key insights, market size, and how AI/Data GCCs are evolving across India and global markets.*

*Defines AI/Data-focused GCCs, study coverage across geographies and industries, and research approach.*

*Explores the transformation of GCCs from cost-saving units to innovation and AI-driven decision centers.*

*Provides a comprehensive view of GCC market size, growth trends, and distribution across industries and regions.*

*Maps the spectrum of AI and data capabilities within GCCs, from data engineering to GenAI.*

*Delivers deep insights into companies operating AI/Data GCCs, including footprint, capabilities, and expansion.*

*Analyzes the availability, distribution, and structure of AI/Data talent across GCCs.*

# Table of Content

9

## Technology Stack & Architecture Trend

*Examines the adoption of cloud platforms, data infrastructure, and AI frameworks across GCCs.*

10

## Use Case & Value Creation

*Showcases real-world AI/Data use cases across industries and their business impact.*

11

## Investment & Expansion Trend

*Tracks recent GCC setups, expansion strategies, and industry-wise investment momentum.*

12

## Challenges & Gaps

*Identifies key barriers such as talent shortages, data quality issues, and AI maturity gaps.*

13

## Opportunity Mapping (Hight Impact Section)

*Pinpoints high-potential areas for new GCC setups, capability expansion, and industry gaps.*

14

## Future Outlook(3-5 Years)

*Projects the evolution of GCCs into AI-native, automation-driven decision engines.*

15

## Strategic Recommendations

*Provides actionable recommendations for setting up, scaling, and optimizing GCCs.*

**Executive Summary:**  
**Key insights &**  
**shifting opportunities**  
**in AI Data GCCs.**



01

# Global Capability Centre (GCC) Ecosystem in India



## India GCC Landscape: A 2026 Overview

**2200+**

Total GCC Footprints

**3300+**

Total Number of GCC Units

**3.2 M+**

Total GCC's Workforce

**\$75.5 B+**

Total GCC Revenue (Est.)

**30+**

Newly Announced GCCs

**150+**

Newly Established GCCs

**40%**

GCC Leadership Growth

**60%**

GCC Global Demand Growth

## Size of AI Data GCC opportunity

Understanding the substantial market potential and growth trajectory for AI Data Global Capability Centres.

## What's changing vs last 3 years

Analyzing the significant shifts and evolving dynamics within the AI Data GCC landscape over recent years.

## Where the opportunity is shifting

Identifying the new frontiers and emerging areas where AI Data GCC opportunities are increasingly concentrating.

## India vs Global comparison

Benchmarking the distinct advantages and challenges of India's AI Data GCC market against global counterparts.

# Key Insights into AI Data GCCs

# Shifting Opportunities in AI Data



## Evolution from cost centres

Examining how GCCs are transforming from mere cost-saving units to strategic AI-driven innovation hubs.



## Rise of AI-driven decision engines

Highlighting the increasing role of AI in empowering GCCs to become critical decision-making powerhouses.



## Impact of GenAI and LLMs

Assessing the transformative influence of Generative AI and Large Language Models on GCC capabilities and offerings.



## Focus on value creation

Shifting emphasis from operational efficiency to generating tangible business value through AI and data initiatives.

# Industry-Specific GCC Distribution



## BFSI Sector Presence

Detailing the prevalence and strategic importance of GCCs within the Banking, Financial Services, and Insurance industry.



## Pharma & Retail Footprint

Mapping the distribution and capabilities of GCCs operating within the pharmaceutical and retail sectors globally.



## Automotive & Tech Concentration

Analyzing the density and innovation focus of GCCs in the automotive and technology industries, highlighting key players.



## Emerging Industry Adoption

Identifying new industries increasingly establishing GCCs, driven by digital transformation and data-centric needs.

# Geographic Hotspots & Hubs

## India's Primary Hubs

Pinpointing major Indian cities like Bangalore, Hyderabad, and Pune as critical centres for GCC operations and talent.

## Global Hotspots: Eastern Europe

Exploring the rise of Eastern European nations as significant locations for GCCs, attracting investment and talent.

## LATAM & ASEAN Emergence

Investigating the growing importance of Latin America and ASEAN regions as strategic sites for global capability centers.

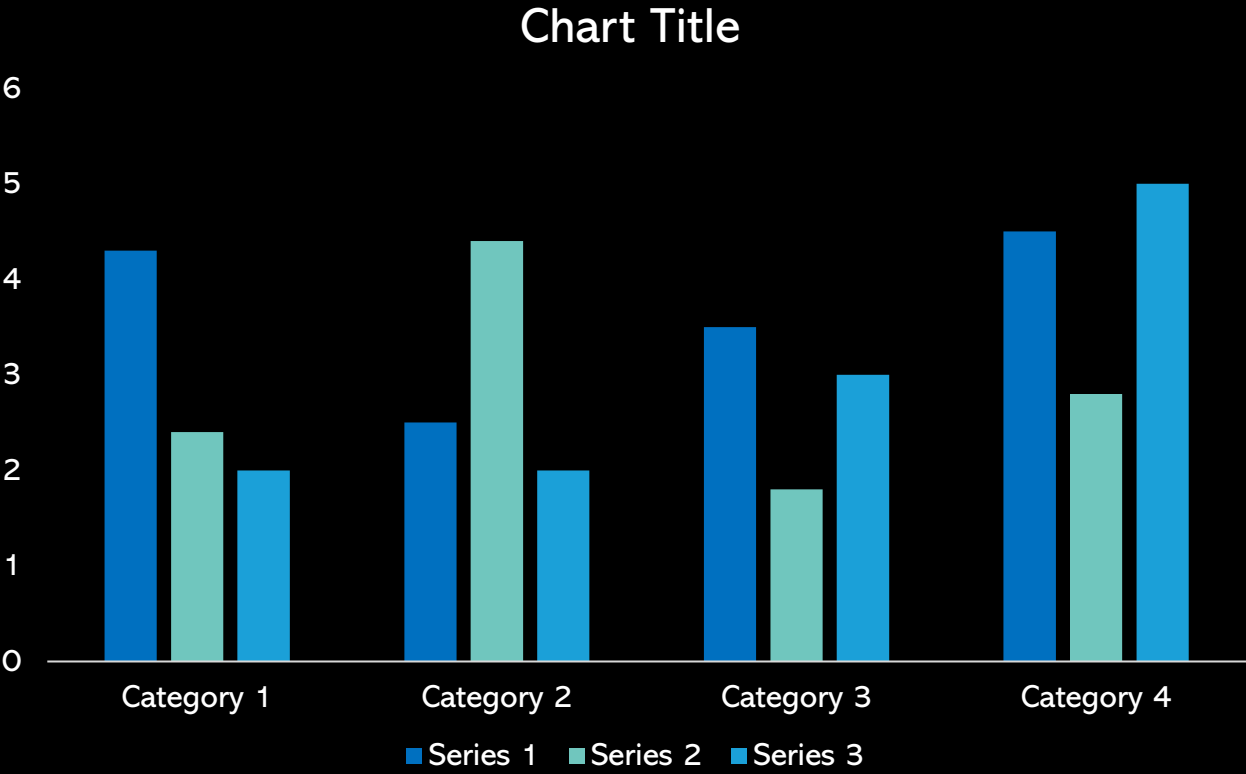
## Strategic Location Drivers

Understanding the key factors influencing the choice of geographic locations for setting up and expanding GCCs worldwide.





# AI Data GCC Landscape: Market Dynamics



Market Dynamics of AI Data GCCs(Opportunity Index (%))

READY TO BRING THE FUTURE INTO  
**FOCUS?**

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