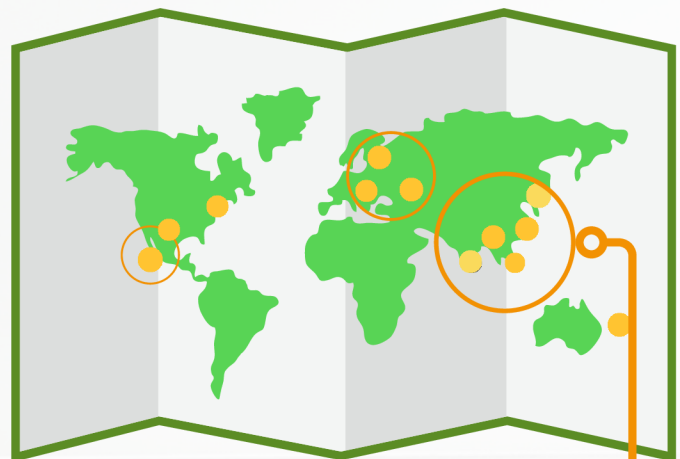


Actionable Insights on Global Capability Centers

A platform to help you navigate across the **thriving
GCC/GIC Opportunity**

In-Depth Insights for
your **Business Needs**



Key Product Features:

- Market Overview
- Competitor Landscape
- Talent Analysis
- What if Scenarios
- Ecosystem Insights
- Strategic Inputs

Bamboo Reports Advantage

Extensive **filters** to identify and **align your Solution Portfolio and Strategy with the GCC Market Landscape**

An unique solution targeted to address the whitespace with **actionable intelligence** on GCC's

The **Largest repository of Global Capability Centers** with 40% more companies and 90% more centers.

Global Capability Centers



An ecosystem that's rapidly **maturing** in **India**

OPPORTUNITY OVERVIEW

\$60 Bn

in revenues generated in 2024-25 and growing at a CAGR of 11.4% since 2015.

SIZE OF PRIZE

\$110 Bn

Estimated market size (by revenue) of Indian GCC's by 2030

~63%

of all Software and IT Administration buying choices made by large MNCs are concluded by their Global Capability Centers in India or in other Asian nations.

BAMBOO REPORTS ADVANTAGE

90%

more data coverage compared to other market intelligence tool

2300+

multinationals with centers in india

5600+

centers with in depth insights

104

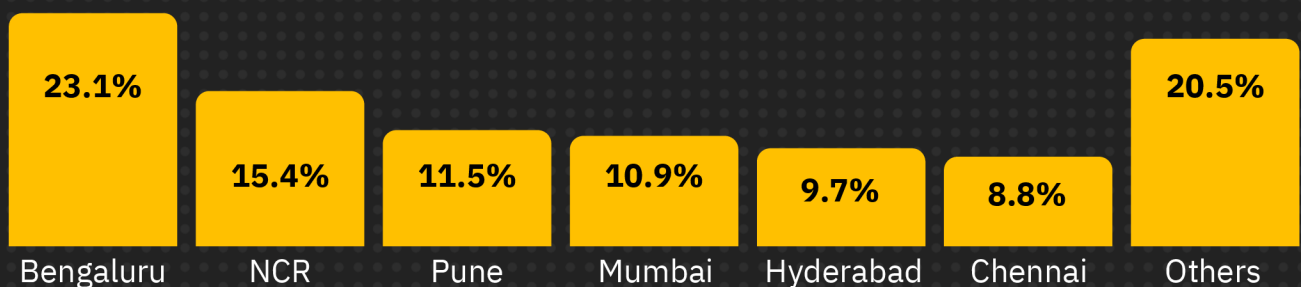
upcoming centers in 2025

May 2025 Update

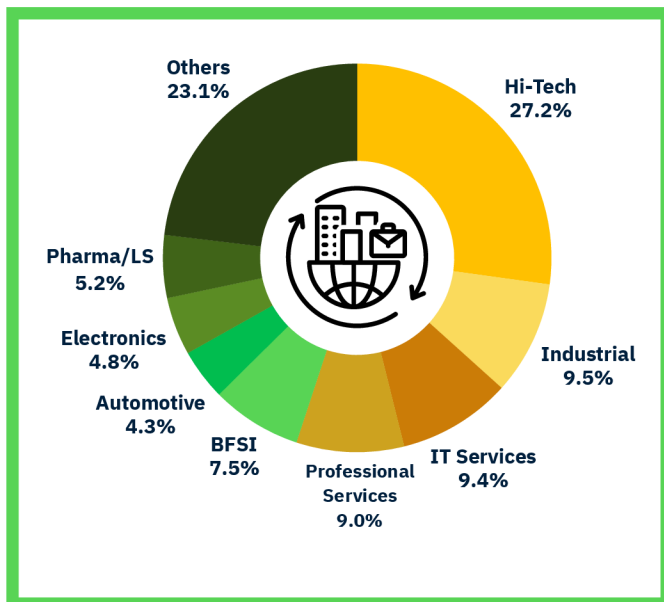
Get unmatched coverage and Insights on GCC's with Bamboo Reports

Break-up of centers of Global MNCs in India

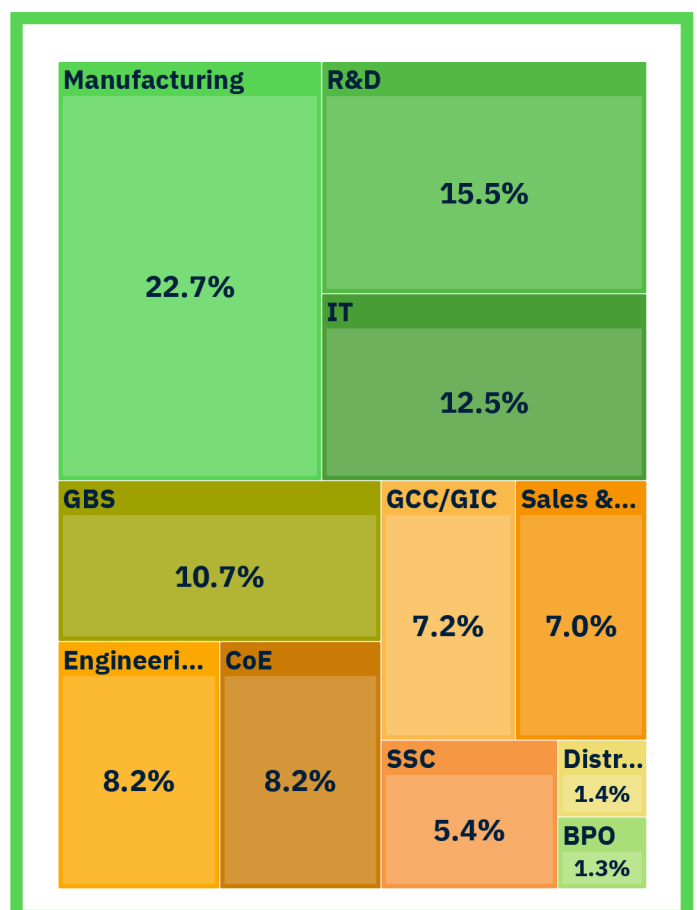
5500+ CENTERS SPREAD ACROSS TOP INDIAN CITIES



INDUSTRY SEGMENTS



TYPE OF CENTERS

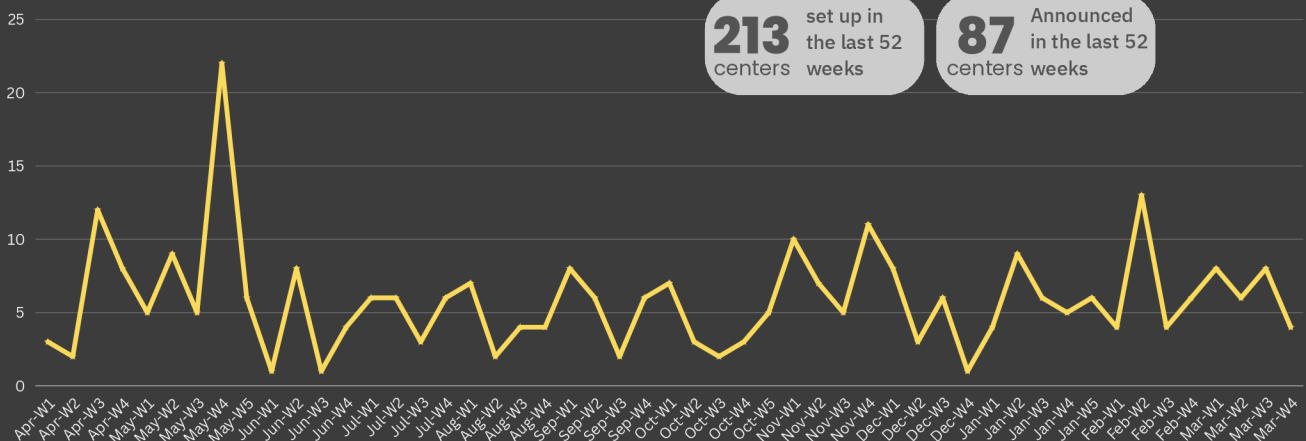


~72%

of these centers cater to the Global locations of the parent company

52 WEEKS OF GCC MOMENTUM

A weekly pulse on how global enterprises are building and scaling GCCs in India



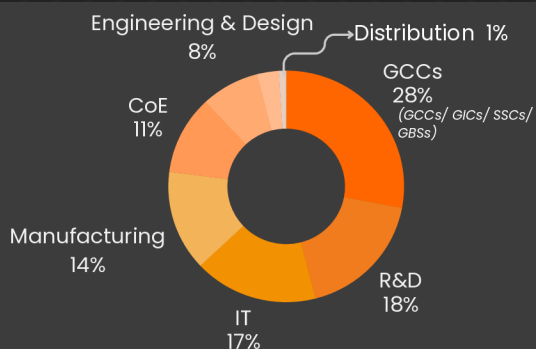
22 May Week 4 saw the highest influx of GCCs in India FY2024-25
Centers

13k employees added in May W4-W5

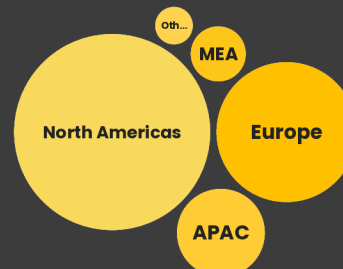
37 of new centers are from the Hi-Tech or IT Services Sector
Per Cent

100 At least one center announced every week
% active year

52 WEEKS OF GCC MOMENTUM: DRILLED DOWN INSIGHTS



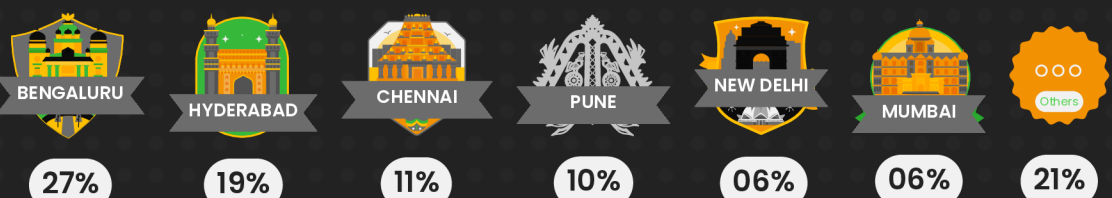
GCC/GIC/GBS, R&D, IT centers dominated with 43% of centers outsourcing IT service



55% of new centers are from North American HQs, with 98% of them based in the United States.

28% of centers are from Europe, and 27% of those have HQ in Germany.

Mapping GCC Growth Across Indian Cities (FY2024-25)



Bengaluru continues to hold the leading position for IT outsourcing in FY 2024-25, accounting for nearly 37% of all new center activity. Hyderabad and Pune are emerging as strong contenders in IT outsourcing, together contributing 31% and forming a dynamic South-West corridor for service delivery.

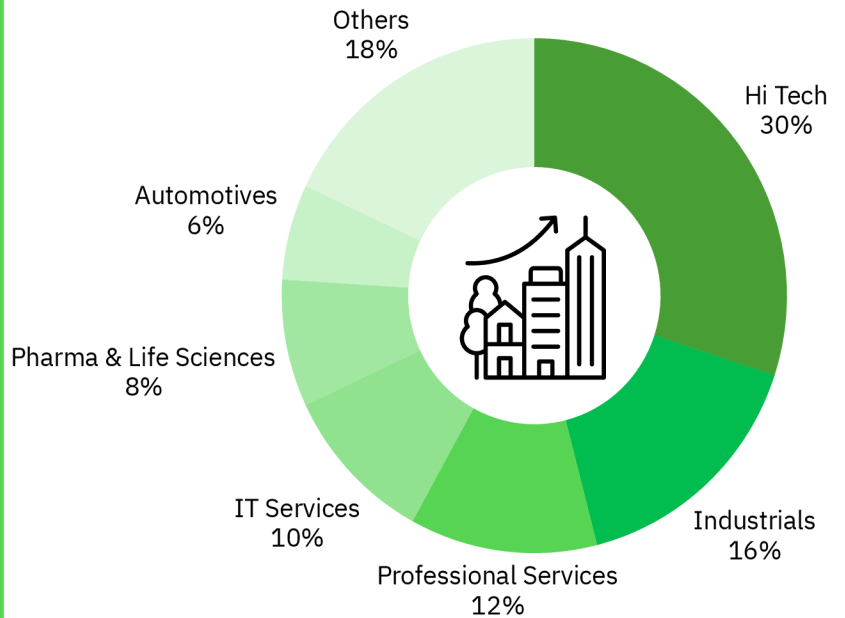
DECODING THE GCC BOOM: Q4 2024-25 IN FOCUS

83 NEW
CENTERS

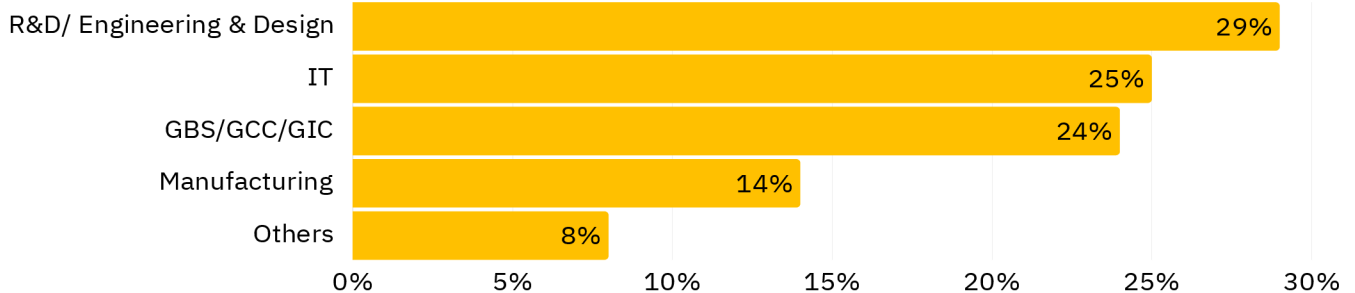
66 Set up in
Centers India in Q4

17 Announced in
Centers India in Q4

New GCC Centers by Industry (Q4 FY 2024-25)



New GCC Centers by Type (Q4 FY 2024-25)



A growing number of R&D and Engineering Center announcements this quarter suggest a potential shift toward's india's positioning as a global innovation and product development hub.

Dominant Cities this Quarter

GCC Distribution across Indian cities



BENGALURU

34%



HYDERABAD

23%



CHENNAI

12%

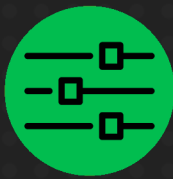


PUNE

06%

How are we different?

Get Relevant Insights on Global Capability Centers in sync with your Strategic Initiatives



First-in-class unique TAM slicers for Market Insights

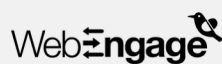


GCC Insights based on your needs



Indept Account and Competitor Intelligence

We are trusted by the B2B marketing teams of 50+ companies



Research **NXT**

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br@researchnxt.com

We are a boutique market research firm that provides custom research solutions for strategic business growth initiatives. Our services include - Bespoke GTM Strategy Research, Market Insights, Account Intelligence, Competitor Intelligence and End-to-end Research-Based Marketing Campaigns.

Over the last seven years, we have successfully assisted 50+ Tech Services and Product organizations in gaining and maintaining a leader's position in their respective domains.