

immersion INDIA®

FIELD NOTES · SHEET 05

From Call Centers to Cockpits

How India Became the World's R&D Capital

GLOBAL CAPABILITY CENTRES · BENGALURU · HYDERABAD · PUNE

One campus in north Bengaluru. The tenant board is the industry: the work moved before the headquarters did.

1,800+
active GCCs in India
close to 2m professionals

$70bn
ecosystem revenue
crossed in early 2026

2.3m
STEM graduates a year
the underlying pipeline

200–400bps
GCC salary premium
over Indian IT services, annually

> A Rolls-Royce engineer in Bengaluru builds jet-engine digital twins. A bank's India campus down the road builds trading infrastructure. If your model of an Indian office is a call centre, it is twenty years old.

India hosts more than 1,800 active Global Capability Centres employing close to two million people, with revenues past $70bn. Nasscom projects 2.8 million people and $105bn a year by 2030.

The functional shift matters more than the headcount. Early centres moved repeatable back-office work offshore; today's are where hard engineering happens. Ninety percent of the activity still sits in six cities.

THE SIGNAL TO WATCH Where the next hundred centres land. Outside the top six cities means the wage spiral is solved.

Make India your classroom

A field guide for global executive education. Turn over for the site visits, the questions for the room and what we run.

www.immersionindia.com
BENGALURU, KARNATAKA, INDIA

FIELD NOTES · SHEET 05 · GLOBAL CAPABILITY CENTRES

Bring the cohort to the case.

Every sheet in this series is a place you can stand in. The dark store, the fab, the swap kiosk, the mandi, the GCC floor — all of them within a day of Bengaluru, and all of them take visitors.

Field Notes is a series on the forces shaping India now, designed to give decision-makers exploring India the right perspective before they commit to it. Each one takes a single force, gives you the argument and the four numbers that anchor it, and names the places in India where you can go and stand in front of it. The series is drawn from *The India That Is Unique*, Immersion India's field guide for global executive education.

ON THE GROUND — GLOBAL CAPABILITY CENTRES

A GCC engineering floor
Which products are owned in India end to end.

A campus talent lead
The salary premium, and why the engineers stay.

A tier-two city centre
Where the next hundred centres are landing.

THREE QUESTIONS FOR THE ROOM

01 GCC salaries are rising 200–400 basis points faster than the IT services sector around them. What does that tell you about which labour market is actually scarce?

02 Ninety percent of activity sits in six cities. Is that concentration a strength (specialisation) or a risk (wage and attrition spirals)?

03 If India is now where the hard engineering happens, what work is left at headquarters — and is that a stable arrangement?

WHAT WE RUN

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READS WELL WITH

06 Startups & Unicorns 07 Artificial Intelligence

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