bamboo reports

India GCC Quarterly Report

Q3 2026 (July to September) **Issue 02**

GCC Investment hits a new high as AI and advanced technology gain ground.



143	164	51	92	39
Companies tracked	Centres	First-time entrants	Expanding companies	Announced

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Executive summary

Q3 2026 (July to September)

This report provides a centre-level view of India's GCC market from July to September 2026. It tracks which companies entered India, which expanded existing operations and where new investments are taking place. By examining individual centres, their functions and hiring activity, the report captures changes in industry investment, city preferences and the responsibilities assigned to India teams.

The quarter saw 143 companies add 164 new centres across 38 cities, a 49% increase from Q2. Of these, 125 centres were active, and 39 remained announced. First-time entrants accounted for 36% of companies, while established companies made up the remaining 64%. Bengaluru and Hyderabad continued to lead, although their combined share fell to 38% as investment spread across more cities. Industrial moved into second place behind software and SaaS, while companies with global revenue below $1Bn increased their share to 41%. 80k+ roles were announced across newly established centres and existing GCCs.

The quarter in numbers

143	164	38	51	41%	80k+
companies tracked	new centres	cities with activity	first-time entrants	companies below $1Bn revenue	roles announced

India's GCCs are taking on greater global responsibilities.

Companies are expanding their India operations through product engineering, AI, research and global technology investments. Some are bringing outsourced functions in-house, while established GCCs add specialised teams and larger facilities. Industrial companies are also building engineering and technology capabilities alongside manufacturing. This report shows where they are investing, what capabilities they are building and what to expect next quarter.

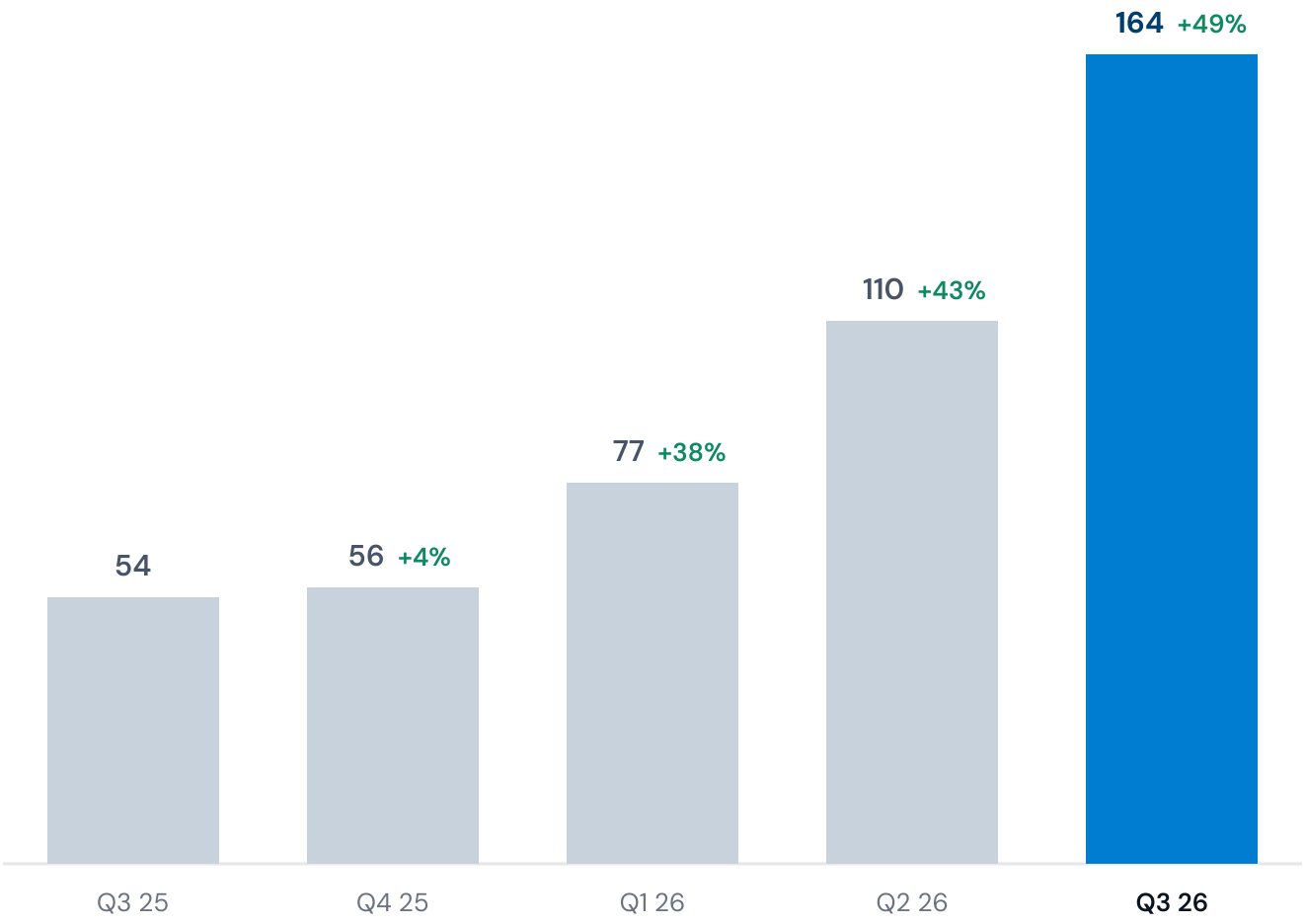


Santosh Abraham
Founder, Bamboo Reports

GCC centre additions triple in one year

New centre activity has risen in every quarter since Q3 2025. The latest increase is also the largest of the five-quarter period, with more companies taking part in India centre investments.

Five quarters of GCC growth · new centres



Source: Bamboo Reports | Research NXT GCC Intelligence Platform

Growth

Added 54 more centres than in Q2, up from 33 in the preceding quarter. Growth has accelerated for three consecutive quarters, rising from 38% in Q1 to 43% in Q2 and 49% in Q3.

Company participation

The number of companies increased from 47 a year ago to 143 this quarter. Centre additions rose from 54 to 164.

Part 1

GCC investment reaches a new quarterly high

6 **The quarter at a glance.** Company entry, expansion and centre status.

7 **The quarter against last quarter.** The changes across industries, locations and investor profiles.

8 **Three signals.** Global responsibilities, industrial investment and specialised hiring.

9 **The profile of companies investing in India.** Revenue bands and HQ origin.

10 **Mix of industries entered this quarter.** Ranking changes and sector concentration.

The quarter at a glance

A centre-level snapshot of activity between July and September 2026, separating new companies from expanding companies and active centres from announced investments.

143
Companies
opened a new centre or expanded an existing one

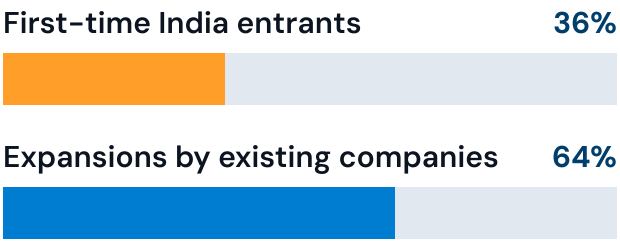
164
New centres
125 live, 39 announced

38
Cities
recorded centre activity this quarter

51
First-time entrants
companies entering India for the first time

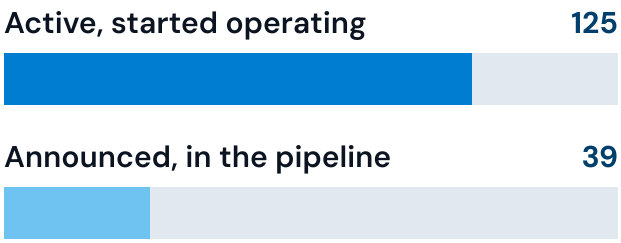
Company profile

New against expansion, share of 143 companies



Centre status

Active against announced, of 164 new centres



Source: Bamboo Reports | Research NXT GCC Intelligence Platform

Existing companies account for most of the activity

Existing companies added 64% of new centres, against 36% first-time entrants. The quarter therefore combined continued new entry with a stronger contribution from companies already operating in India.

Of the 164 centres recorded, 125 were active and 39 were still announced at quarter end. The announced group accounts for about one-quarter of activity and will be examined separately in the pipeline section.

The quarter against last quarter

The quarterly comparison shows where the increase was strongest, beyond the headline rise in company and centre counts. Industry rankings, geographic concentration and the investor mix all changed.

Measure	Q2 2026	Q3 2026	Change
Companies	99	**143**	+44%
New centres	110	**164**	+49%
First-time entrants	40	**51**	+28%
Expanding companies	59	**92**	+56%
Cities	27	**38**	+41%

Source: Bamboo Reports | Research NXT GCC Intelligence Platform

Industry

Industrial moved into second place, behind software and SaaS.

4 → **18** companies

Industrial moved from 4 to 18 companies, passing retail and consumer goods and BFSI to rank second behind software and SaaS. Hi-tech also recorded a sizeable increase, from 3 to 13.

Retail moved in the opposite direction, from 10 companies to 8, after its strong Q2 showing.

Location

Growth was less concentrated in the two largest hubs.

52% → **38%** share

Bengaluru and Hyderabad each added three centres, but their combined share of activity fell from 52% to 38%.

The increase in the number of cities indicates that the quarter's growth was less concentrated in the two largest hubs.

Company profile

Companies below $1Bn in revenue increased their share.

30% → **41%** share

This change came alongside faster growth by established companies.

This suggests that the quarter brought together smaller global investors and companies adding to existing India operations.

Three signals that shaped Q3 2026

The quarter was marked by a change in the work companies assigned to India, the industries investing and the roles employers were seeking. These signals appear in company announcements as well as the centre and hiring records.

Signal 1

Global responsibilities

Existing GCCs expand their role in global operations

Companies outlined plans to bring selected technology work in-house, rather than continue relying on external partners.

Companies added product and engineering responsibilities to their India operations.

These are examples of investment in ownership and decision-making, not only larger teams.

Signal 2

Industrial investment

Industrial investment rises alongside demand for engineering

The jump in industrial participation included companies building engineering, software and product capabilities.

Industrial companies illustrate different approaches, from product development and engineering support to industrial technology platforms.

Manufacturing remains part of the activity, but it is not the only reason industrial companies are investing.

Signal 3

Specialised hiring

Technology hiring covers increasingly specialised work

Technology functions made up 62% of job-posting records captured for new and existing centres included in the Q3 hiring study.

Software development was the largest grouping, followed by data and analytics, cybersecurity, and AI/ML.

These are observed postings, distinct from the separately reported announced workforce commitments.

Share of job-posting records by function



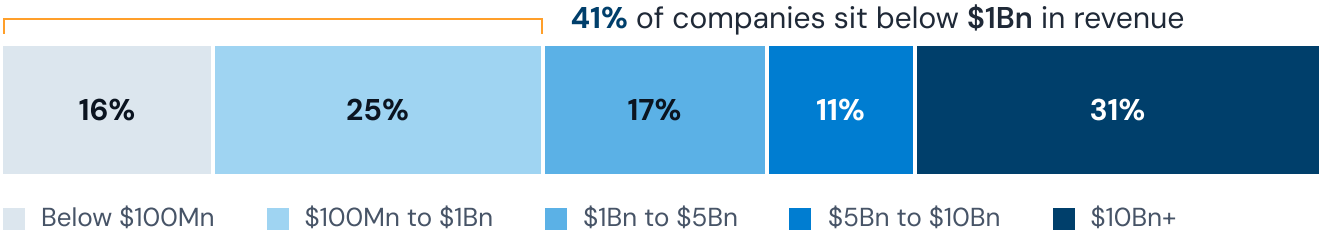
The biggest story of the quarter

India GCCs are being given more ownership: of global technology work, of industrial engineering, and of the specialised roles behind them.

The profile of companies investing in India

The investor base changed this quarter, with a higher share of companies below $1Bn in global revenue. The mix of headquarters regions remained led by North America and Europe.

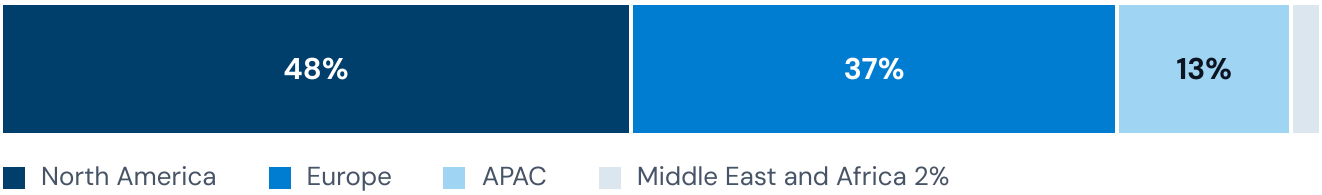
How big · global revenue band



Source: Bamboo Reports | Research NXT GCC Intelligence Platform

Large enterprises still formed a substantial part of the quarter, with companies above $10Bn accounting for 31%. The change is in the balance between groups, rather than a withdrawal by large investors.

From where · HQ origin



Source: Bamboo Reports | Research NXT GCC Intelligence Platform

The US accounted for 48% of companies, followed by Germany at 10% and Japan at 6%. Europe's share rose from 35% to 37%, while North America's fell from 51% to 48%. This points to a modest change in the regional mix despite continued North America leadership.

Mid-market companies increase

The two revenue bands below $1Bn together contributed 41% of companies, an 11-percentage-point increase from Q2. Large investors remain active; the change is in the balance between groups.

Mix of industries entered this quarter

Software and SaaS remained the largest group, but the sharpest changes came from industrial and hi-tech. Retail and consumer goods, one of Q2's leading sectors, recorded fewer companies.

Top 10 industries · companies, Q2 versus Q3 2026



		Q2 → Q3	
1	Software and SaaS	17 → 21	+24%
2	Industrial	4 → 18	+350%
3	BFSI	10 → 13	+30%
4	Hi-tech	3 → 13	+333%
5	Healthcare, life sciences and pharma	7 → 12	+71%
6	Automotive	6 → 11	+83%
7	Professional services	7 → 10	+43%
8	Retail and consumer goods	10 → 8	-20%
9	Electronics	2 → 8	+300%
10	IT services	5 → 6	+20%

Source: Bamboo Reports | Research NXT GCC Intelligence Platform. Growth percentages rounded.

The largest changes

Industrial added more companies than any other category and moved into second place. Hi-tech also added companies. Together, these two industries accounted for a significant share of the additional companies compared with Q2.

Retail & Consumer Goods recorded fewer companies in the most recent quarter, down from the previous one. While new investments slowed, the sector continued to attract GCCs focused on software development, digital commerce, and global business operations. The decline was modest compared with the sharp growth recorded in Industrial and Hi-Tech.

2

Part 2

A closer look at GCC locations

12 **Preferred locations of GCC centres.** The 164 centres mapped across 38 cities.

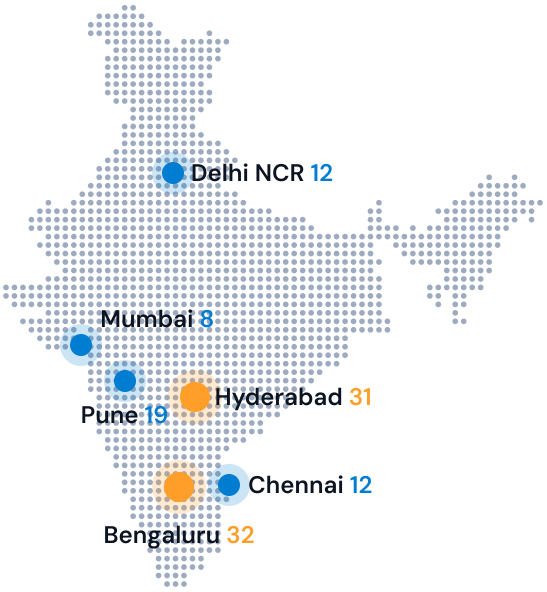
13 **Bengaluru retains a narrow lead over Hyderabad** The Q2 prediction, new centre activity and announced pipeline.

14 **Chennai.** The increase in engineering, technology and global services activity.

15 **Pune.** Industrial clusters and technology corridors.

Preferred locations of GCC centres

New centre activity reached more Indian cities in Q3. Bengaluru and Hyderabad remained the two largest hubs, while Pune, Delhi NCR and Chennai continued to attract investment. Activity outside the leading locations also accounted for a larger share of the quarter.



Preferred locations · share of centres

Bengaluru	**19%**
Hyderabad	**19%**
Pune	12%
Delhi NCR	7%
Chennai	7%
Mumbai and Navi Mumbai	5%
Emerging cities and other locations	32%

Emerging cities and other locations: 52 centres

Source: Bamboo Reports | Research NXT GCC Intelligence Platform. Shares rounded.

Bengaluru and Hyderabad continue to lead

Bengaluru and Hyderabad remained the two largest locations, but their combined share declined from 52% in Q2 to 38% in Q3. Both cities recorded more centres than in the previous quarter, while other locations grew faster.

Pune retained third place, with industrial and technology investments contributing to its activity. Delhi NCR and Chennai also recorded stronger growth, attracting a mix of engineering, technology and global business services centres.

More activity outside the major hubs

Around 32% of centre activity was recorded outside the six leading city clusters, compared with 21% in Q2. Ahmedabad was among the more active locations, alongside investments across smaller industrial and technology centres.

The increase outside the main hubs shows that new investment is reaching a wider set of locations, even as Bengaluru and Hyderabad continue to account for the largest individual shares.

Bengaluru retains a narrow lead over Hyderabad

Q2 ended with the two cities separated by one new centre. Q3 kept that gap unchanged, although the number of centres and the balance between active and announced activity shifted.

The gap held at one centre

Q2 2026 new centres



Gap 1 centre

Q3 2026 new centres



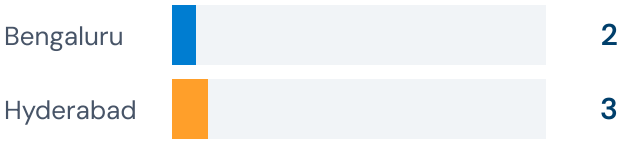
Gap 1 centre

Active and announced, Q3 2026

Active centres



Announced, not yet active



Source: Bamboo Reports | Research NXT GCC Intelligence Platform

Bengaluru grew from 29 centres in Q2 to 32 in Q3, and Hyderabad from 28 to 31, so the one-centre gap was unchanged.

Bengaluru recorded 30 active centres out of 32 new entries, against 28 of 31 in Hyderabad.

Hyderabad had one more announced centre than Bengaluru at quarter end, giving the two cities different balances in the current pipeline.

Together, the two locations contributed 63 new centres, but accounted for a smaller share of the national total than in Q2 as activity grew elsewhere.

Inside Chennai: technology and engineering locations

Chennai recorded 12 centres this quarter. New investments are spread across established IT corridors, research locations and industrial areas. The OMR corridor leads the recorded activity, while Guindy continues to attract technology and business services centres.

Micro-clusters · share of Chennai activity

OMR IT Corridor	33%	The largest share of recorded activity, with new GCC/GIC and research centres supporting global technology, engineering and business operations.
Guindy	25%	Centres, with activity in IT services and professional services.
Poonamallee	8%	Manufacturing and industrial investment on the city's western edge.
Adyar-IIT Corridor	8%	Specialised technology work around the IIT research area.

The other 25% of centres are spread across multiple micro-locations.

Source: Bamboo Reports | Research NXT GCC Intelligence Platform.

The OMR corridor accounts for the largest share of Chennai's recorded activity. Guindy recorded three centres in IT services and professional services. The IIT research area adds specialised technology work, while other locations include manufacturing and industrial investments.

Chennai's new centres are not confined to its established IT corridor. Engineering, research and global operations are drawing investment across different parts of the city.

Inside Pune: industrial and technology corridors

Pune recorded 19 centres this quarter. Activity is spread between established industrial locations and technology offices. Chakan recorded the largest concentration, while other locations attracted investments in engineering, IT and global business services.

Micro-clusters · share of Pune activity

Chakan	28%	Manufacturing and engineering activity.
Pimpri-Chinchwad	22%	Showing the importance of Pune's industrial locations alongside its technology offices.
Hadapsar	6%	Technology-focused investment covering software and engineering.
Kharadi	6%	Technology and enterprise operations centres.

The other 39% of centres are spread across multiple micro-locations, including Shivajinagar, Wagholi, Talegaon etc.

Source: Bamboo Reports | Research NXT GCC Intelligence Platform. Shares rounded.

Chakan and Pimpri-Chinchwad together account for half of Pune's recorded activity. Technology-focused investments were recorded in Hadapsar, Kharadi and other smaller locations, covering software, engineering and enterprise operations.

Pune's investment pattern differs from that of a mainly IT-led city. Industrial and manufacturing facilities remain important, while technology and business services centres are being established across several office locations.

3

Part 3

India GCCs take on greater global responsibilities

17 **What companies are building in India.** Centre types and the functions inside them.

18 **The names that moved** Four investments that stood out.

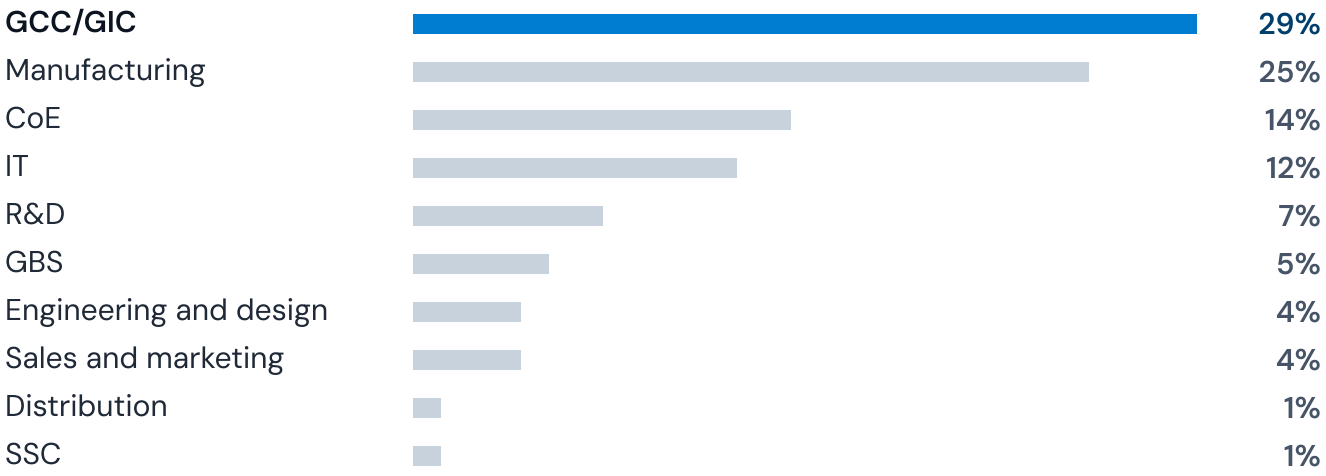
20 **Sector in focus: industrial.** Five-quarter trend, centre types, locations and functions.

22 **Sector in focus: retail and consumer goods.** Centre types, locations and functions.

What companies are building in India

The new centres cover a wide range of work, from manufacturing and engineering to IT, AI and global business services. The mix shows how companies are using India for both specialised technology development and broader business operations.

The kind of centre opened



Source: Bamboo Reports | Research NXT GCC Intelligence Platform

GCC/GIC remained the largest centre type, followed by manufacturing. Together, they accounted for more than half of the quarter's additions. CoE and R&D centres contributed another 21%, with investments covering product development, research and specialised engineering.

The functions inside them

51% IT services

22% Engineering and R&D

19% AI services

16% Human resources

15% Procurement and supply chain

11% Finance and accounting

10% Sales and marketing

10% Customer support

Other functions (66%). Multi-function centres are counted across categories; shares may not total 100%. Source: Bamboo Reports | Research NXT GCC Intelligence Platform

Technology and engineering remain central to new centres

IT services appeared in about half of the centres, followed by engineering and R&D at 22%, while AI services were present in nearly one in five centres, covering AI engineering, machine learning, automation and data-driven applications. Business functions—including HR, procurement, finance and customer support—also formed an important part of the mix, reflecting the broad range of responsibilities managed from India.

The names that moved

Four investments stood out this quarter, showing how global companies are building technology capabilities and assigning greater responsibilities to their India centres.

Charles Schwab & Co., Inc. · Hyderabad

GCC/GIC · BFSI · Technology centre

Location
Hyderabad, Gachibowli

Planned workforce
2K by 2027

First-year hiring
Around 500

Focus from India: technology development, software engineering and operations supporting the company's US business, including selected technology work currently handled by external contractors.

Why it matters: the company's first India technology capability centre marks a move towards managing more engineering and technology work directly. The planned workforce expansion also gives Hyderabad a larger role in its global technology operations.

Anaplan, Inc. · Gurugram

GCC/GIC · Software and SaaS · Product engineering

Location
Gurugram

Planned capacity
Up to 500 employees

Investment
Multi-million-dollar APAC investment

Focus from India: product development, engineering, agentic AI and customer operations, including contributions to the company's global product roadmap.

Why it matters: Anaplan's largest global office brings product engineering and customer-facing functions together in India. The investment includes its first Asia-Pacific Customer Experience Centre, giving the Gurugram operation a direct role in product development and customer engagement.

The names that moved, continued



Canadian Imperial Bank of Commerce (CIBC) · Hyderabad

GCC/GIC · BFSI · Canada · New India GCC

Location
Hyderabad

Centre type
GCC/GIC

Planned workforce
2K+ specialised roles

Investment type
First global capabilities hub in India

Focus from India: banking technology, advanced analytics, risk modelling, fraud detection, regulatory compliance, cybersecurity and operational resilience.

Why it matters: CIBC is bringing work previously managed by external partners into its own India centre. The investment gives Hyderabad a larger role in the bank's global technology and risk operations, with more than 2,000 specialised jobs planned.



Octave Intelligence plc · Hyderabad

GCC/GIC · Industrial software · UK · Global Technology and Innovation Centre

Location
HITEC City, Hyderabad

Planned workforce
2K engineers

Centre type
GCC/GIC

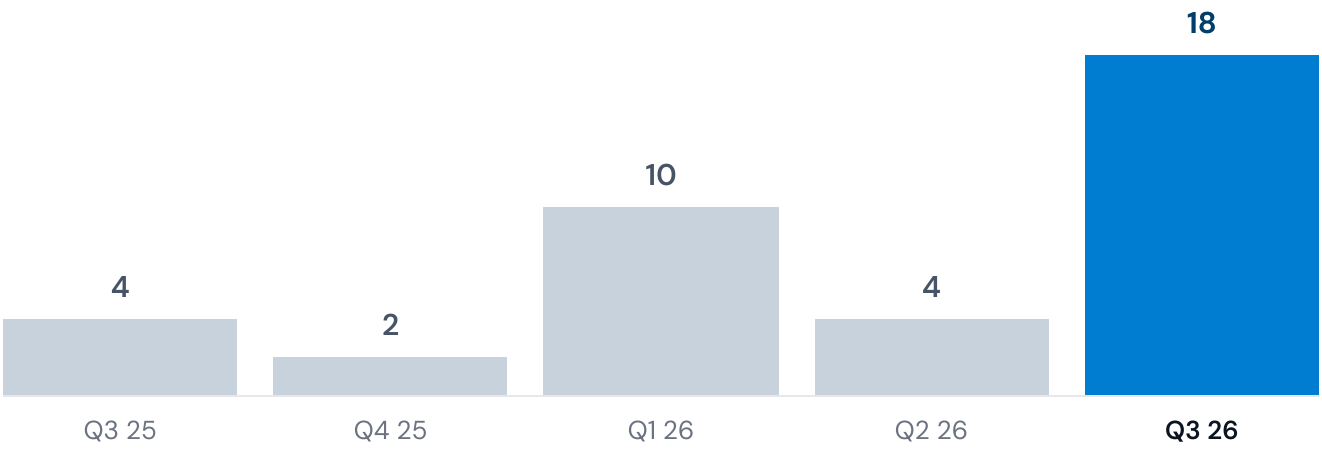
Focus from India: software engineering, AI, cloud, data and product development for industrial facilities and infrastructure, supporting customers across global markets.

Why it matters: the new centre brings industrial software and product engineering responsibilities to India, with plans to scale to 2,000 engineers. It is an example of industrial companies using India to develop technology for their global customers, not only for manufacturing or business support.

Sector in focus: Industrial

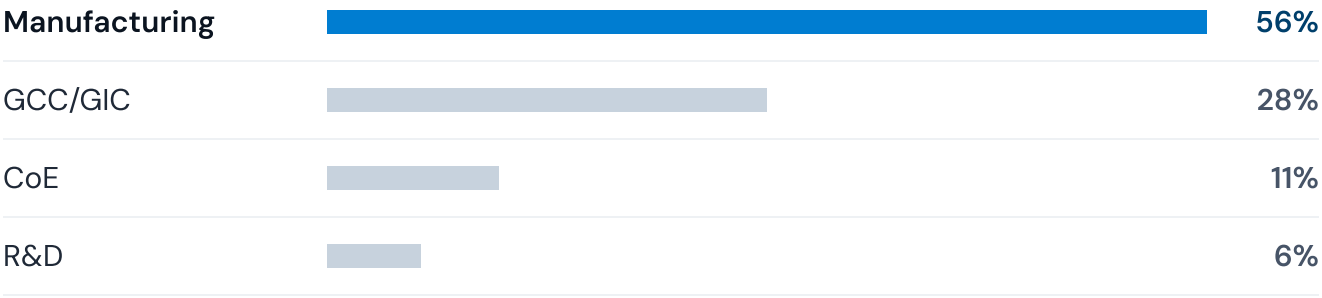
Industrial companies recorded the strongest increase during Q3 2026, moving into second place behind software and SaaS. The quarter brought a mix of manufacturing facilities, engineering centres and technology operations supporting global industrial businesses.

Industrial companies over five quarters



Source: Bamboo Reports | Research NXT GCC Intelligence Platform.

The kind of centres opened



Source: Bamboo Reports | Research NXT GCC Intelligence Platform.

Engineering adds to industrial investment

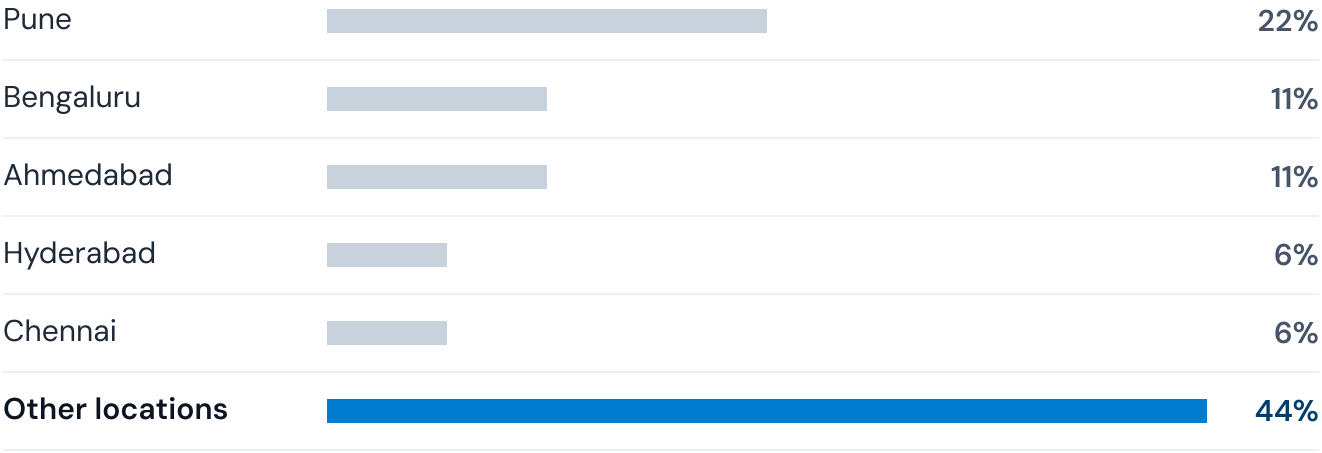
Industrial increased from 4 to 18 companies, a 4.5x rise over Q2. Manufacturing accounted for more than half of the centres, while GCC/GIC, CoE and R&D facilities made up the remaining 44%.

The newer capabilities include product engineering, industrial software, automation, digital platforms and specialised research. Industrial companies are adding technology and development work alongside their manufacturing operations.

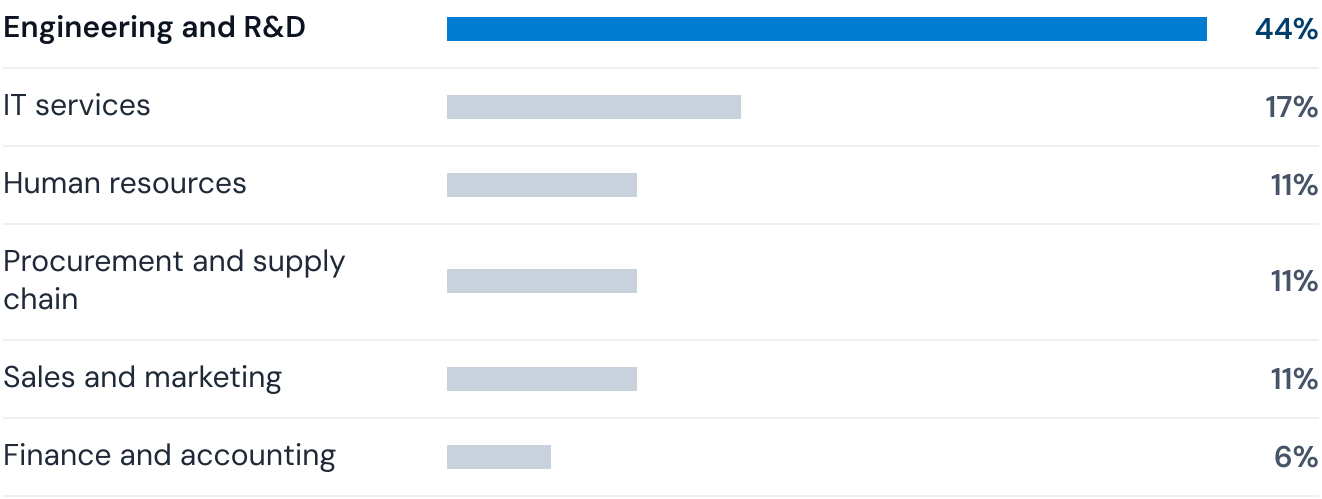
Where industrial centres landed

Pune led industrial activity, while manufacturing investments were spread across smaller industrial locations.

Industrial centres by city



Functions inside industrial centres



Source: Bamboo Reports | Research NXT GCC Intelligence Platform.

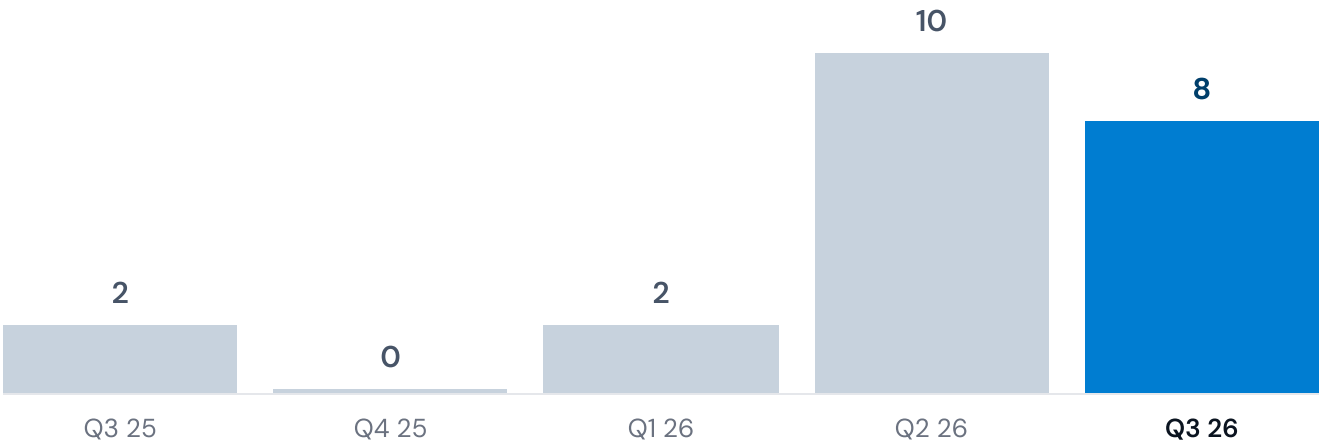
The investment pattern

Pune led industrial activity, while manufacturing investments were spread across smaller industrial locations. Engineering and R&D were the most common specialised service functions, covering product development, design and industrial technology. The mix shows that companies are adding technical responsibilities alongside production facilities.

Sector in focus: retail and consumer goods

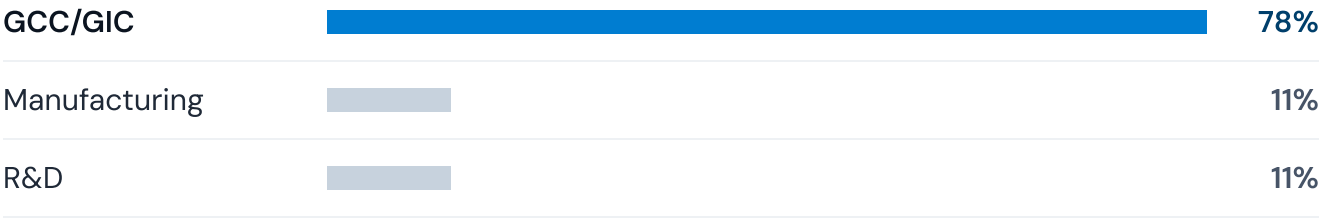
Retail and consumer goods recorded fewer companies after its strong Q2 performance. However, new centre investments remained focused on digital commerce, product engineering, supply chain and global business operations.

Retail companies over five quarters



Source: Bamboo Reports | Research NXT GCC Intelligence Platform.

The kind of centres opened



Source: Bamboo Reports | Research NXT GCC Intelligence Platform.

Technology and business operations lead retail investment

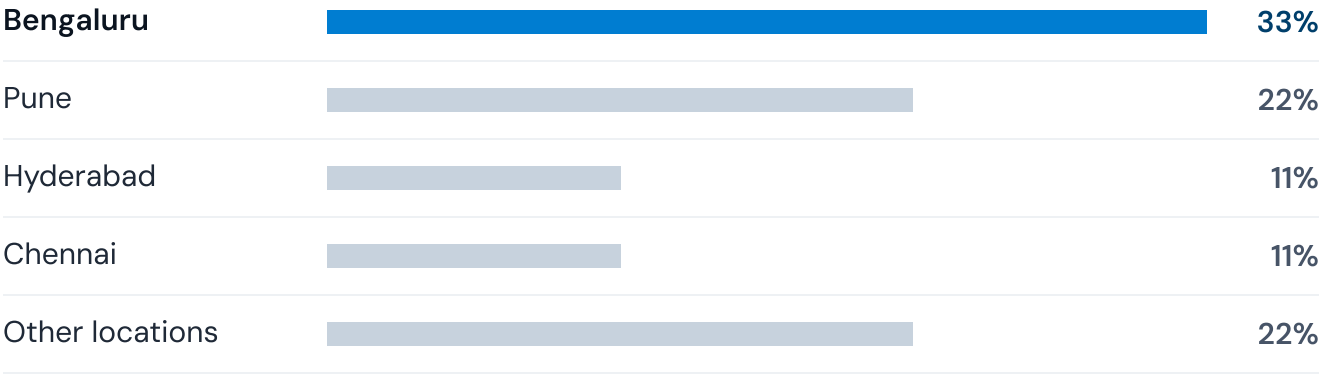
Retail declined from 10 to 8 companies, but these companies added nine new centres during Q3. GCC/GIC facilities accounted for seven of them, with work covering software engineering, e-commerce platforms, AI, data and global business functions.

Finance, procurement and supply chain capabilities also featured in the new investments, showing how retail companies are building technology and business operations within their India centres.

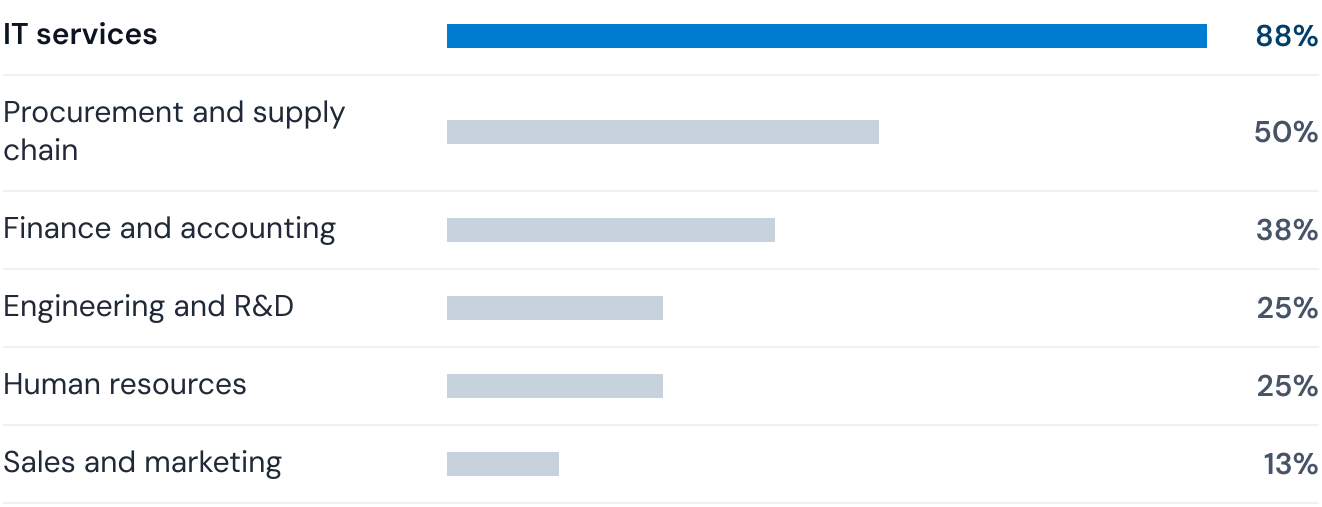
Where retail and consumer goods centres landed

Bengaluru and Pune together accounted for five of the nine retail centres opened this quarter.

Retail centres by city



Functions inside retail centres



Source: Bamboo Reports | Research NXT GCC Intelligence Platform. Multi-function centres are counted across categories; shares may not total 100%.

Technology and global operations lead retail investment

Bengaluru and Pune together accounted for five of the nine centres. IT services appeared in nearly nine out of ten centres with declared functions, followed by procurement, supply chain and finance. Retail companies are using their India centres for technology development alongside global business operations, with AI, digital commerce and product engineering among their technical work.

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Part 4

AI and advanced technology become central to GCC mandates

25 AI adoption across GCC operations.

26 Product engineering and R&D capabilities.

27 Beyond AI: cloud, cybersecurity and data.



AI adoption across GCC operations

AI is taking on different roles within GCCs, from developing global products and automating business processes to improving security and engineering work. New investments show how companies are building AI capabilities directly into their technology and business operations.

01

Generative and agentic AI

Building AI into enterprise applications

GCC teams are developing generative AI applications, large language models and autonomous AI agents. Their work includes AI-assisted software development, enterprise platforms and systems that can carry out business tasks with less manual intervention.

02

AI engineering and product development

Developing AI capabilities for global products

Centres are working on AI-enabled products, machine learning systems and software platforms. Some are also involved in computer vision, semiconductor engineering and AI applications for industrial equipment.

03

AI automation and business operations

Applying AI to everyday business functions

Companies are using AI across finance, supply chain, customer operations and other business processes. The work includes intelligent automation, forecasting, data analysis and tools that support day-to-day business decisions.

04

AI security and governance

Securing AI systems used by enterprises

GCC teams are developing security capabilities for AI applications, copilots and autonomous agents. Their responsibilities include AI governance, threat detection and the protection of AI systems used across global operations.

AI work is becoming more specialised

The quarter's investments cover different stages of AI development, from building models and applications to deploying and securing them. AI is also becoming part of product engineering, enterprise technology and business operations, giving India teams responsibility for more specialised work.

Product engineering and R&D capabilities

New centres are taking on work across software development, product design, research and global technology platforms. Companies are building teams in India to develop products, improve existing systems and support engineering work for their global businesses.

01

Software and product engineering

Building products for global markets

GCC teams are developing enterprise software, digital products and customer-facing platforms. Their responsibilities include product architecture, software development, testing and new features, with some teams in India contributing directly to global product roadmaps.

02

Industrial and automotive engineering

Supporting product design and development

Engineering centres are working on automotive components, industrial equipment, embedded systems and product testing. The work includes design engineering, simulation, benchmarking and software development for manufacturing and industrial applications.

03

Research and specialised development

Taking on advanced research work

New research facilities focus on optics, robotics, semiconductor technologies, medical devices and materials testing. These centres support product improvement, technical validation and specialised development work for global engineering teams.

04

Digital platforms and technology ownership

Managing core technology from India

Companies are expanding responsibility for cloud platforms, enterprise applications, data systems and digital products. Some centres are also bringing technology development in-house, giving India teams a more direct role in maintaining and improving global systems.

India teams take on more product responsibility

The quarter's investments show a mix of research, engineering and product development work. Alongside technical support, some India centres are now contributing to product design, technology decisions and development roadmaps, with responsibilities extending across the product lifecycle.

Beyond AI: cloud, cybersecurity and data

Alongside AI and product engineering, new GCC investments are focused on cloud platforms, cybersecurity and data management. These capabilities support global applications, secure technology operations and the development of digital products.

01

Cloud and infrastructure engineering

Building and managing global technology platforms

GCC teams are developing cloud-native applications, managing enterprise infrastructure and modernising existing systems. Their work includes cloud architecture, platform engineering, infrastructure automation and performance improvement for global technology operations.

02

Cybersecurity and digital protection

Securing enterprise systems and applications

New technology investments cover threat detection, application security, identity management and cyber risk. Some centres are also working on cloud security and protecting AI applications, extending cybersecurity responsibilities across enterprise platforms and digital products.

03

Data engineering and analytics

Developing data platforms for global operations

Centres are building data pipelines, analytics platforms and data management systems used across business functions. Their responsibilities include data integration, governance, predictive analytics and preparing enterprise data for AI and machine learning applications.

04

Enterprise technology and platform modernisation

Improving the systems used across global businesses

Companies are expanding teams responsible for enterprise applications, platform integration and digital operations. Some are also moving technology work from external service providers into their own GCCs, giving India teams direct responsibility for maintaining and developing core systems.

Technology responsibilities extend beyond support

The quarter's investments include both new platform development and the management of existing global systems. Cloud, cybersecurity and data teams are increasingly working alongside software engineering and product development, with India centres taking responsibility for systems used across multiple markets.

Part 5

GCC hiring shifts towards specialised technology capabilities

29 Where GCCs are hiring.

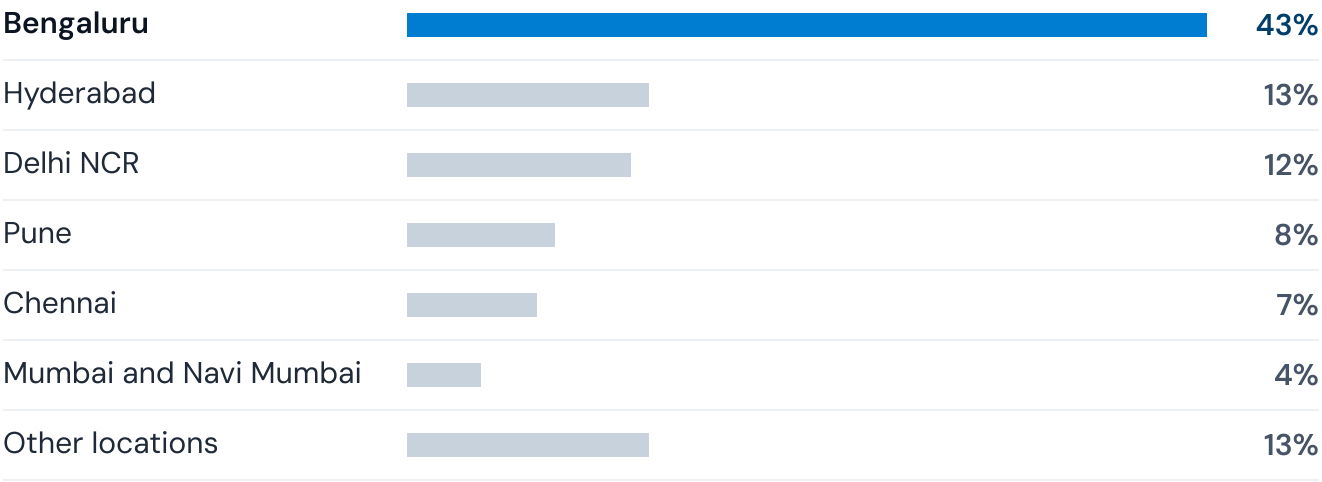
30 Technology roles lead GCC hiring

31 Experienced professionals and technical skills lead GCC hiring.

Where GCCs are hiring

GCC hiring remained concentrated in major technology cities during Q3, with **80k+ roles announced** across newly established centres and existing GCCs. The analysis examines active job postings to identify where companies are focusing their recruitment efforts.

Share of job postings by city



Source: Bamboo Reports | Research NXT GCC Intelligence Platform. Shares are based on captured Q3 job postings from new centres and existing centres with active recruitment. They represent posting activity, not completed hiring or the entire GCC job market.

Bengaluru leads hiring activity

Bengaluru accounted for the largest share of job postings, followed by Hyderabad and Delhi NCR. Together, these three locations represented more than two-thirds of the recorded activity. Software development, data and enterprise technology roles contributed to hiring across these established GCC hubs.

Hiring extends across different industries

Pune and Chennai recorded recruitment across engineering, technology and global business operations. Financial services and software companies continued to recruit for digital and technical functions, while industrial and automotive employers added demand for engineering and product development skills.

The city distribution shows that technology hiring remains concentrated in the largest GCC cities, while engineering and business functions support recruitment across a broader set of cities.

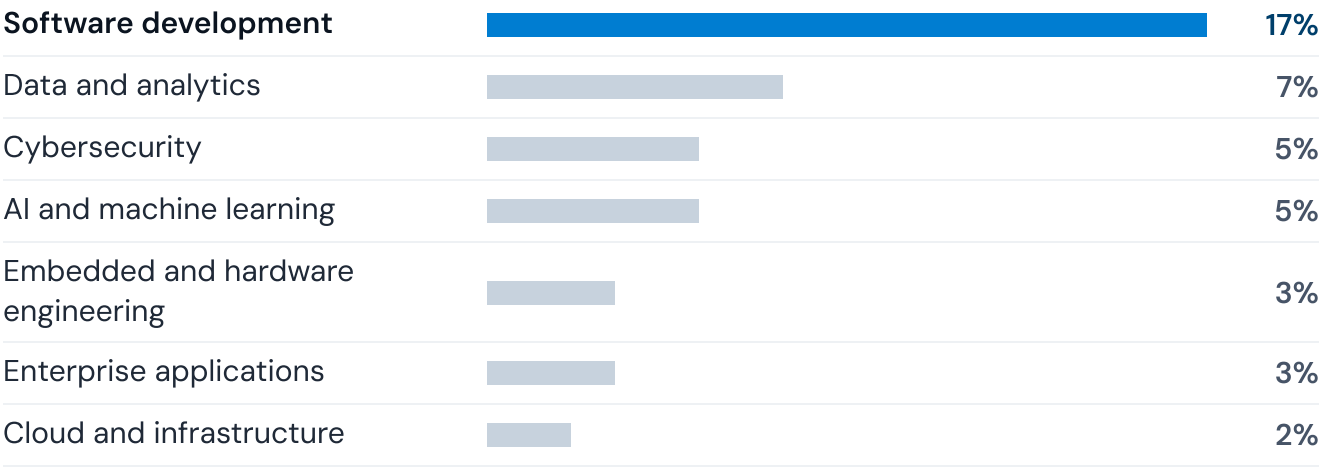
Technology roles lead GCC hiring

Technology accounted for the larger share of job postings during Q3, with demand spread across software development, data, cybersecurity and AI. Business functions also contributed to recruitment, particularly in operations, sales, procurement and customer support.

Technology versus non-technology hiring · share of job postings



Leading technology functions · share of all job postings



Source: Bamboo Reports | Research NXT GCC Intelligence Platform.

Software and specialised technology skills lead demand

Software development remained the largest individual hiring category. Data and analytics followed, while cybersecurity and AI/ML recorded similar shares. Hiring also extended to embedded systems, enterprise applications and cloud infrastructure, indicating demand for diverse technical skills across GCC operations.

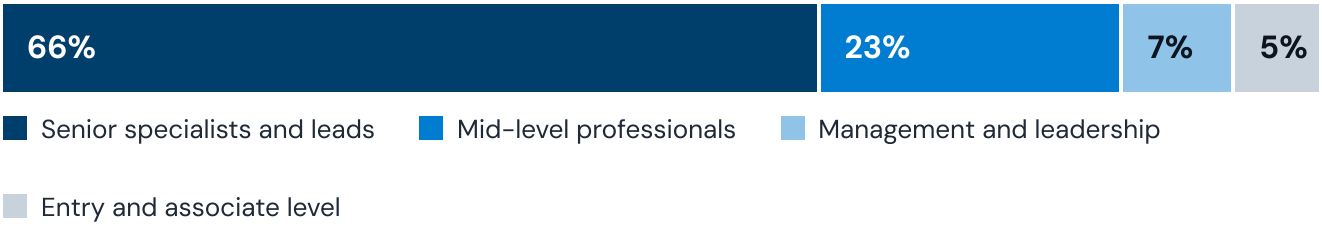
Business functions remain part of GCC recruitment

Business operations and pre-sales were among the leading non-technology job categories, each accounting for 5% of all postings. Companies also recruited across account management, procurement, legal, finance and customer support. Technology roles accounted for most recorded postings, while business functions continued to support global operations alongside specialised engineering and digital teams.

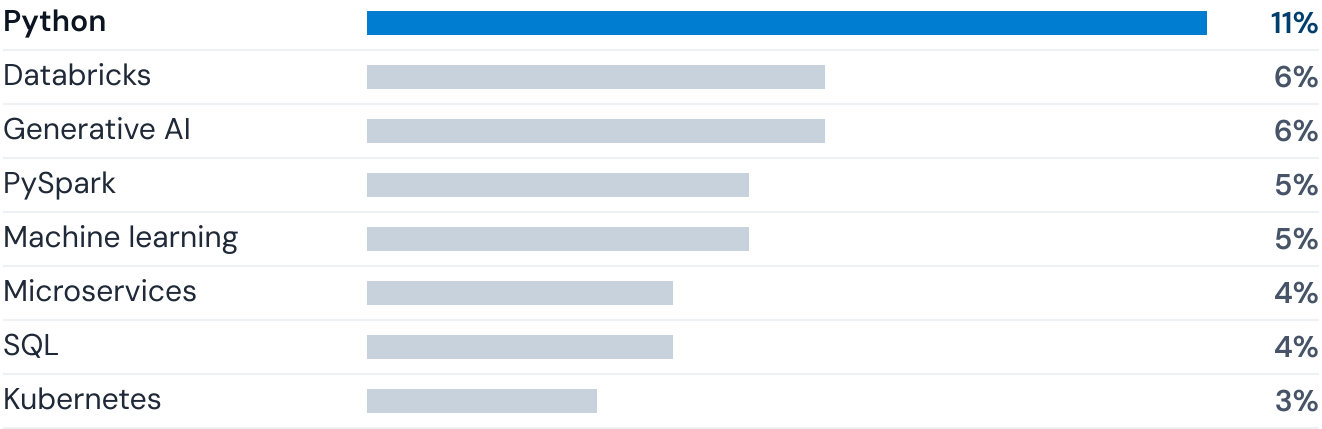
Experienced professionals and technical skills lead GCC hiring

GCC hiring in Q3 focused on experienced professionals with skills in software development, data, AI and cybersecurity. Senior specialists and technical leads accounted for the largest share of job postings, while employers also sought expertise in enterprise platforms and engineering.

Seniority of job postings



Most frequently requested technical skills · share of job postings



Source: Bamboo Reports | Research NXT GCC Intelligence Platform.

Experienced professionals remain in demand

Senior specialists and leads dominated recruitment, with the strongest demand among professionals with 5 to 8 years of experience. Cybersecurity, data and AI roles showed a greater need for experienced engineers and technical leads.

Technical requirements differ across functions

Python, REST APIs and microservices featured in software engineering roles, while Databricks, PySpark and machine learning supported data and AI hiring. Cloud and cybersecurity roles required platform and security expertise, while industrial and automotive companies sought embedded systems and specialised engineering skills.

Part 6

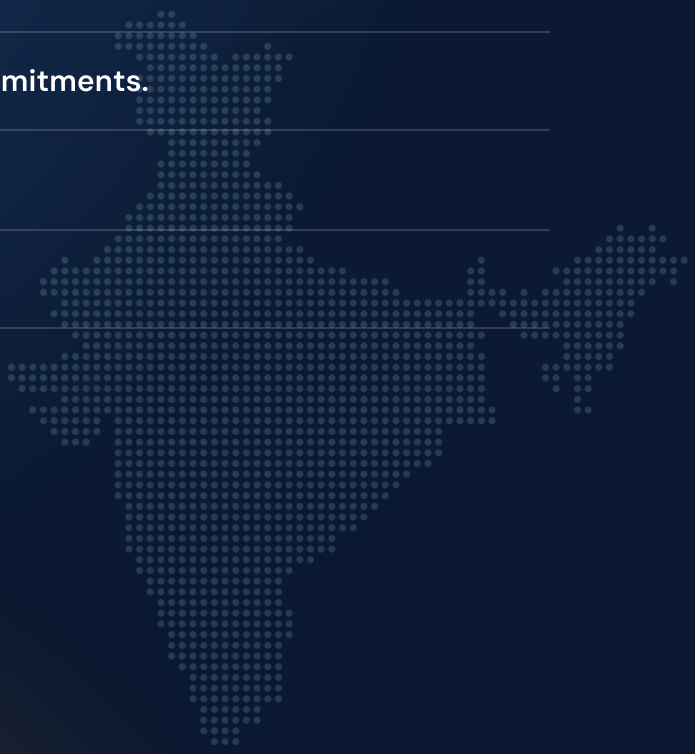
The next phase of GCC investment

33 Announced GCC pipeline.

34 Planned hiring and infrastructure commitments.

35 Signals from existing GCC operations.

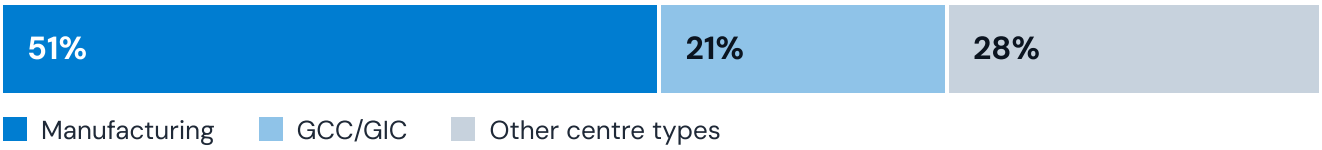
36 The quarter ahead: Q4 2026.



Announced GCC pipeline

The announced pipeline points to further investment in manufacturing, technology and global business operations. Companies are planning new facilities and expanding existing operations, with upcoming projects spread across established GCC hubs and industrial locations.

The announced pipeline by centre type · share of announced centres



Source: Bamboo Reports | Research NXT GCC Intelligence Platform.

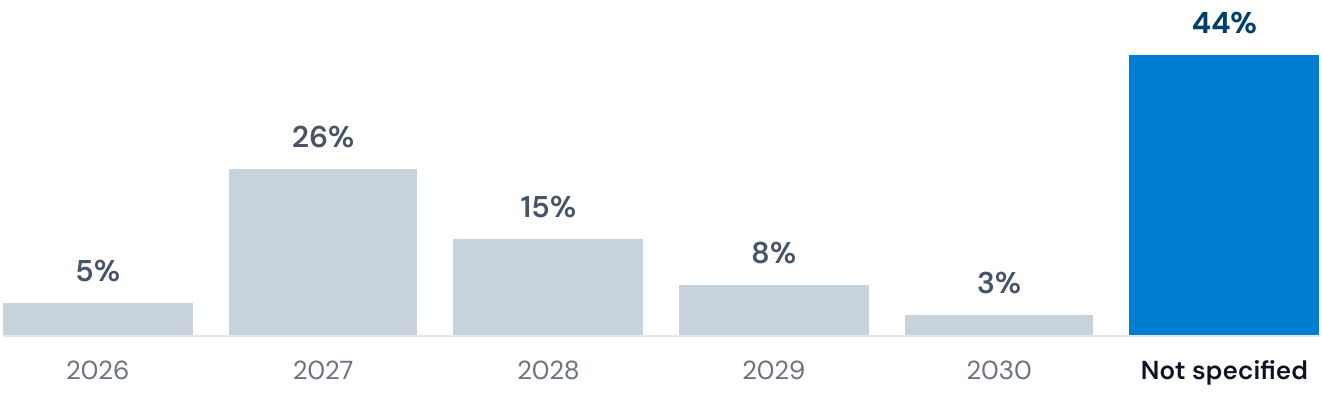
Manufacturing accounts for much of the pipeline

Manufacturing accounts for the largest share of upcoming investments, particularly across industrial, automotive, hi-tech and electronics. Planned facilities cover production, advanced engineering and semiconductor-related activities. GCC/GIC, CoE, R&D and IT centres make up the remaining pipeline.

New locations enter the investment pipeline

Mumbai, Hyderabad and Chennai remain important locations for announced investments, while Ahmedabad, Dholera and other industrial areas are attracting planned manufacturing and technology facilities. Some larger industrial projects have yet to confirm their final locations.

Expected opening timeline · share of announced centres



Source: Bamboo Reports | Research NXT GCC Intelligence Platform.

Most announced centres with a stated opening year are scheduled for 2027 and 2028. A substantial share has not disclosed a confirmed timeline, suggesting that several projects remain in the early planning stages.

Planned hiring and infrastructure commitments

Companies announced hiring plans, office expansions and campus investments during Q3, with several commitments extending into 2027 and beyond.

Workforce commitments

Technology and engineering drive planned hiring

- Companies plan to recruit software engineers, AI specialists and cybersecurity professionals.
- Financial services and technology firms are expanding product development and engineering teams.
- Several recruitment plans are spread across multiple years, extending beyond 2027.

Infrastructure investments

Larger campuses support future expansion

- Mumbai attracted a major financial services campus investment.
- Hyderabad saw new technology centres with dedicated engineering facilities.
- Bengaluru recorded additional office leasing and expansions by established companies.

Expected workforce capacity

Companies are planning for longer-term growth

- Larger facilities provide space for companies to expand their teams over time.
- Planned capacity supports engineering, research and global business operations.
- Actual hiring will take place in phases as new facilities become operational.

The investment outlook

The quarter's commitments point to continued demand for experienced technology talent, engineering facilities and office infrastructure. Companies are planning for longer-term operations in India, with hiring and facility development extending across the coming years.

Signals from existing GCC operations

During Q3, established companies expanded office space, added technology responsibilities and increased hiring. Some also consolidated operations or changed how their India centres are managed.

01

Footprint expansions

Companies are adding space to support existing operations.

Several established GCCs announced larger offices and long-term campus investments in Bengaluru, Gurugram and Pune. These include additional technology workspaces, engineering facilities and expanded global business operations.

The investments point to continued demand for office infrastructure and room for future team expansion.

02

Capability expansion

India teams are taking ownership of more specialised work.

Existing centres received additional responsibilities in global product engineering, AI platforms, data infrastructure and automotive technology. Some teams now manage product development and research activities that support global businesses directly.

These changes add new technical responsibilities without necessarily requiring companies to establish separate centres.

03

Reorganisation

Companies are reorganising how work is managed from India.

The quarter included the consolidation of existing offices into larger facilities, changes in captive-centre arrangements and the transfer of selected operations to external service providers.

These developments show that GCC activity involves changes to existing operations as well as new investment. Not every change represents an expansion.

04

Hiring and capability expansion

Established centres continue to add specialised teams.

Hiring announcements covered AI engineering, cybersecurity, cloud, data analytics and product development. Some companies are expanding existing technical teams, while others are adding new research and engineering functions.

These plans extend across different hiring periods, with companies building capabilities within centres that are already active.

The quarter ahead: Q4 2026

Two predictions for the next quarter, based on Q3 investment patterns. Both will be reviewed against actual Q4 data in the next edition.

1

Industrial remains among the top three industries

Industrial moved into second place in Q3, with 18 companies compared with 4 in Q2.

The announced manufacturing pipeline points to continued investment across industrial and engineering operations.

Prediction

Industrial will remain among the top three industries for new GCC investment in Q4.

2

Mid-market companies maintain their share

Companies with global revenue below $1Bn accounted for 41% of Q3 activity, up from 30% in Q2.

Smaller global companies are establishing specialised technology, engineering and business operations in India.

Prediction

Companies below $1Bn in revenue will account for at least 35% of companies opening or expanding centres in Q4.

The intelligence layer behind the numbers

Bamboo Reports tracks the market continuously, at centre level — see what changed, where it changed, and where the next opportunity is forming.

6,100+

GCC centres tracked at coordinate level

2,400+

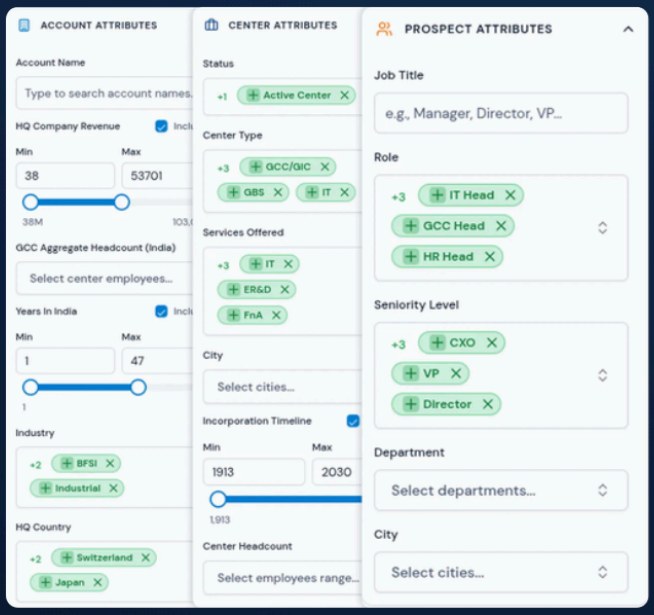
Parent companies covered across industries

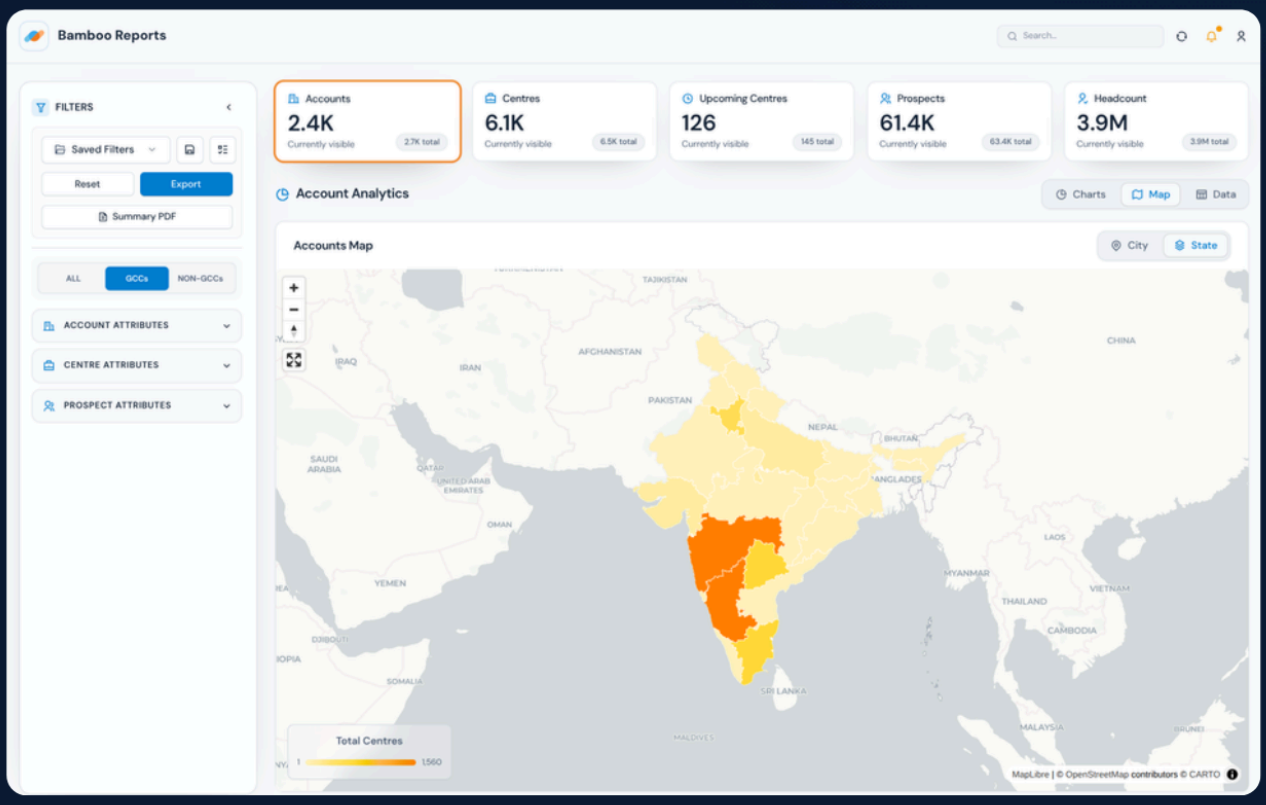
61K+

Decision-makers mapped across the ecosystem

How the bamboo report works

Combine geography, industry, revenue, headcount, technology, function, and seniority. Include what matters. Exclude what does not. Find companies by current or former names.





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Your trusted GTM partner for Global Capability Centres

This report is the top-level view. The link below open the live data behind it for readers who want to move from reading the quarter to working with it.

Query the live platform

Move from the printed cut to the full dataset. Filter companies, centres, functions and decision-makers, and build the view that fits your own question.

A custom intelligence brief

The quarter's data cut for your specific ICP, sector or account list, prepared as a bespoke brief by the analyst team, typically within 24 to 48 hours.

The next tracker and deep-dives

The Q3 2026 (July to September) issue, plus the mid-year deep-dive with sector economics, location intelligence and centre-level tech footprint.

Book an appointment with our expert team today to receive a consultation on your GCC strategy.

Book now

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