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India's GCC Tech Talent Landscape 2024

April 2025

About the Report

The "India's GCC Tech Talent Landscape 2024" Report provides an overview of the evolving Global Capability Centres (GCCs) in India, focusing on their growth and strategic priorities in 2024. It highlights key trends in hiring across multiple industries and sectors, offering insights into how GCCs are adapting to changing market needs and demands.

The report also sheds light on emerging talent areas within GCCs, touching on advancements in technology and skills. It provides a general look at compensation trends and discusses the tech hiring dynamics in both major and Tier 2 locations, offering a broad perspective on tech talent supply, demand, and role requirements.

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1.9 Mn. Workforce

The Talent Backbone of Global Capability Centres

Kapil Joshi
CEO, Quess IT Staffing

From The Leadership Desk

At Quess, we believe that a resilient, future-ready workforce begins with clarity. Our “India’s GCC Tech Talent Landscape 2024” report offers a comprehensive, data-driven exploration of the shifting dynamics within Global Capability Centres (GCCs) in India. This report aims to decode the changing tech talent demands across industries, regions, and job families, helping organizations navigate the evolving workforce landscape.

One key takeaway from our research is that India is no longer just a destination for talent delivery, but increasingly a hub for innovation and capability. While the demand is softening for traditional skill sets, there is a clear shift toward specialized expertise in emerging fields like GenAI, FinOps, and cloud security. These areas are no longer just trends—they are essential to the strategic growth of businesses, and as we like to say, "Demand isn't disappearing; it's evolving."

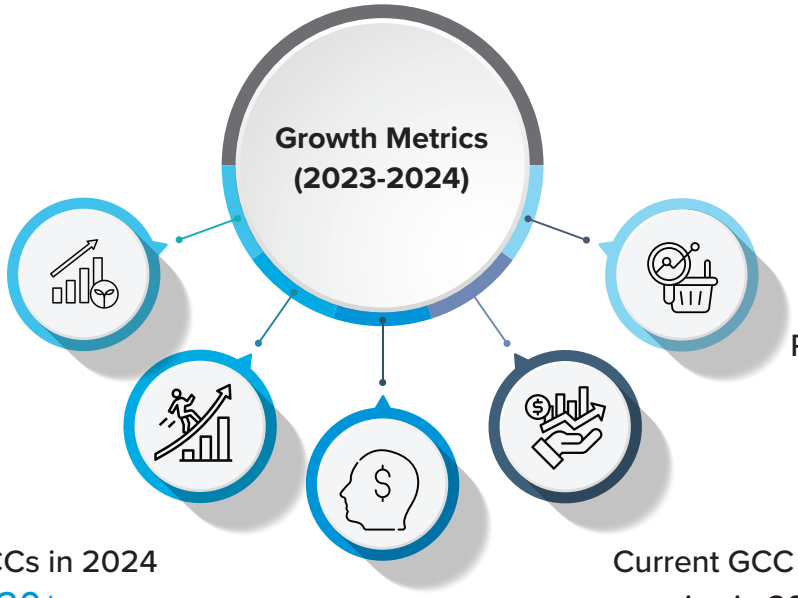
Our report stands out by focusing on demand signals and understanding why certain roles are seeing rapid growth. Companies are prioritizing depth over breadth in their talent strategies, seeking high-impact, high-scarcity skills such as data engineering, cloud architecture, and cybersecurity. In this new environment, roles like AI Observability Engineers and Zero Trust Architects are becoming foundational to business transformation, signaling a move toward capability-driven models.

In addition to evolving skill demands, location strategies are shifting as well. GCCs are increasingly turning to Tier-2 cities, which are emerging as key tech talent hubs. These cities offer improved infrastructure, policy incentives, and access to untapped talent pools, enabling organizations to balance cost, scalability, and innovation. Tier-2 cities are no longer secondary—they have become strategic locations for high-quality, specialized operations.

Quess is at the heart of this transformation, helping our clients make more informed, strategic talent decisions. By combining macro-level insights with ground-level intelligence, we empower organizations to anticipate changes and build sustainable talent frameworks. However, the growing demand-supply gap in emerging technology skills, coupled with premium salaries for top talent, highlights an urgent need to accelerate reskilling initiatives. We hope this report serves as both a snapshot of the current GCC ecosystem and a strategic lens for organizations to navigate the future of talent in India.

Decoding the Demand: A Strategic View

This report dives into the key drivers shaping tech talent demand within GCCs, providing a strategic perspective on emerging skills, evolving roles, and the shifting landscape of global operations.



Total GCCs in India
1800+

New GCCs in 2024
120+

Expected GCC headcount by 2030
2.5 Mn.

Current GCC market size in 2024
$64.6 Bn.

Projected GCC market size by 2030
$105 Bn.

In recent years, India has witnessed a diversification in Global Capability Centres (GCCs), with emerging sectors such as semiconductor, automotive, and medical devices joining traditionally dominant sectors like BFSI, IT, and manufacturing. This shift is driven by digital transformation, talent availability, cost optimization, and India's robust innovation ecosystem. While established sectors leverage scale and domain expertise, new entrants are capitalizing on India's agility in R&D and tech enablement. The convergence of these sectors is reshaping India's position as a global hub for next-gen capabilities.

Hiring Horizons: A Multi-Dimensional View

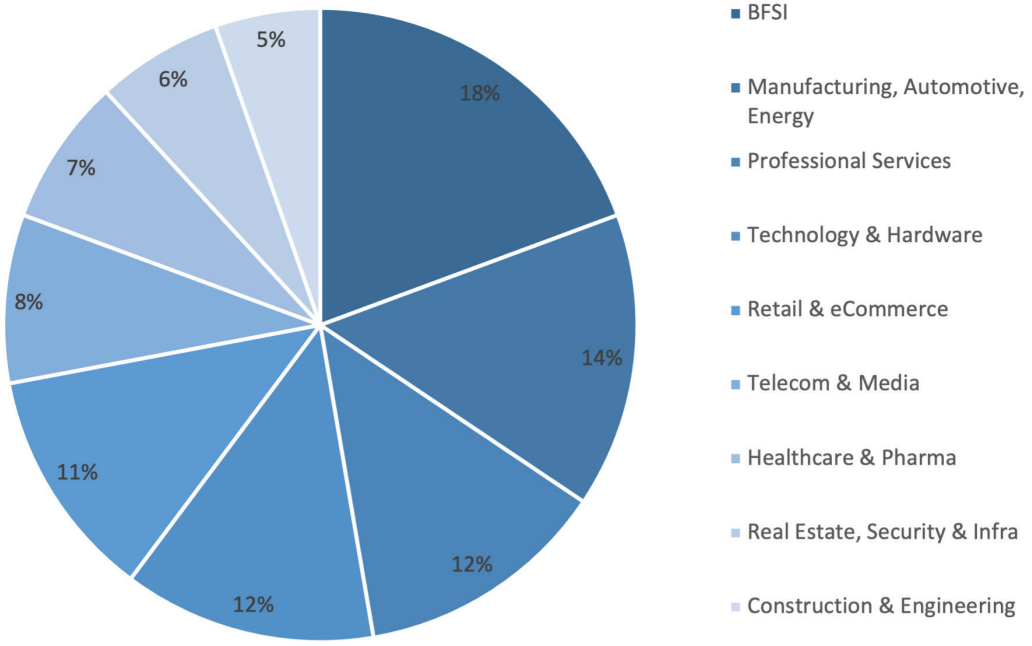
The hiring trends within Global Capability Centres (GCCs) across various industries highlight the shifting landscape of workforce demands driven by technological advancements, global competition, and evolving market needs. As industries embrace digital transformation, automation, and data-driven decision-making, GCCs have become crucial hubs for talent acquisition and specialized skill development. Different sectors exhibit unique hiring trends, with each sector leveraging GCCs to address specific challenges and seize emerging opportunities. The following table outlines the sector-wise distribution of GCC hiring, shedding light on the key factors driving growth and shaping the workforce composition in these industries.

Talent Share & Growth Drivers in GCCs		
Sector	**% Share of GCC Hiring**	**What's Driving the Hiring**
BFSI	18%	AI-led credit risk, digital lending, embedded finance, cybersecurity, ops modernization.
Manufacturing, Automotive, Energy	14%	Smart factories, industrial IoT, EV platforms, sustainability & predictive maintenance.
Professional Services	12%	Finance/legal shared services, compliance automation, analytics-driven CoEs.
Technology & Hardware	12%	Cloud engineering, chip design, IoT hardware, edge AI, product platforms.
Retail & eCommerce	11%	AI personalization, omnichannel platforms, digital payments, logistics tech.
Telecom & Media	8%	5G rollout, AI in network ops, OTT content platforms, edge compute.
Healthcare & Pharma	7%	AI diagnostics, HIPAA cloud infra, wearable tech, health data platforms.
Real Estate, Security & Infra	6%	Smart surveillance, digital asset mgmt, urban infra analytics.
Construction & Engineering	5%	BIM systems, smart infra tech, digital project lifecycle platforms.
Hospitality, Travel & Logistics	5%	AI-based forecasting, last-mile logistics, smart booking platforms.
Defence & Aerospace	2%	Secure embedded systems, classified cloud, simulation and avionics software.

Tech Hiring Landscape in GCCs

Hiring trends across Tier 1 cities indicate that GCCs are continuing to double down on engineering-led growth, with platform engineering, AI, data, and cloud roles forming the backbone of their digital initiatives. Business and ERP functions maintain steady demand, driven by large-scale enterprise transformation programs. A visible focus on cybersecurity, IT governance, and service operations reflects a maturing ecosystem prioritizing resilience and scalability.

Tech Talent Demand Across Industries



The chart above illustrates the comparative hiring activity of different industries within the Global Capability Centres (GCC) that are currently focused on recruiting tech talent from India. The chart provides a general overview of the industries demonstrating the most significant demand for Indian professionals, offering insights into potential employment trends and opportunities.

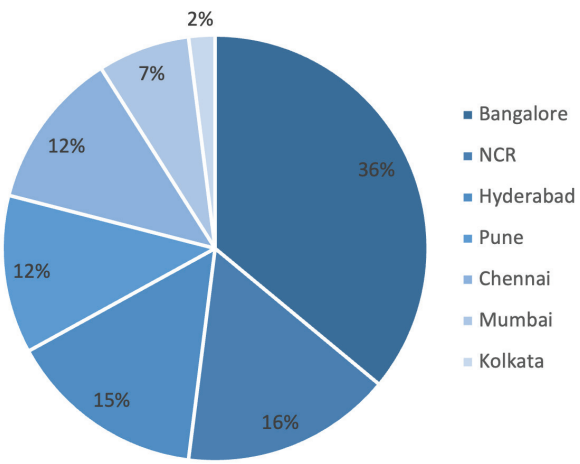
Critical Insights at a Glance

The evolving tech talent landscape across India's major cities continues to shape the strategic priorities of Global Capability Centres (GCCs). Each metro brings its own strengths to the table, contributing uniquely to industry verticals and specialized domains. Emerging patterns reveal how regional expertise and focus areas are influencing the future of global operations. This dynamic distribution highlights the deepening maturity and specialization within the GCC ecosystem.

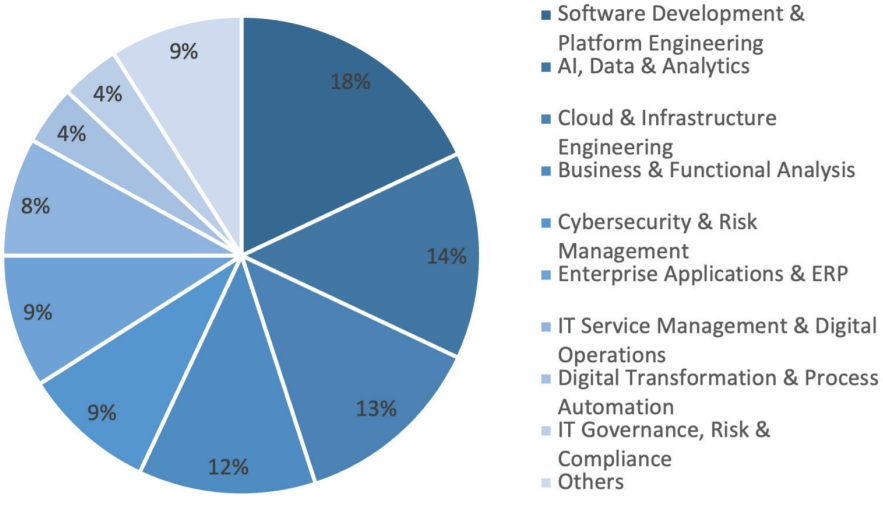
- Bengaluru dominates high-skill and strategic categories like Defence & Aerospace (61%), Construction (43%), and BFSI (35%)
- Hyderabad leads in Healthcare & Pharma (41%) and is strong across most tech-aligned categories
- NCR plays a key role in Professional Services, Telecom & Media, and Real Estate & Infrastructure, showcasing strength in compliance, governance, and support functions
- Mumbai has a focused footprint in BFSI (16%) and Telecom (25%), reinforcing its domain-heavy GCC structure
- Chennai and Pune show balanced yet moderate contributions across verticals, with Pune having a sharper edge in Manufacturing (24%)

The charts show the geographical distribution of job demand and the spread across various technologies in GCCs. The first chart highlights regional job concentration, while the second focuses on growth in specific technological areas.

Location Spread



Job Family Spread



Tech Talent Hotspots

GCCs in India are reshaping their talent priorities to align with fast-evolving digital transformation agendas. At the forefront is the surge in demand for Generative AI and related roles, as organizations shift from pilot projects to full-scale deployments, particularly in BFSI and retail sectors.

Complementing this is the rise of platform engineering and site reliability roles, which are crucial for building resilient, automated, and scalable multi-cloud environments. The growing emphasis on customer-centricity is also reflected in the increasing integration of UI/UX professionals within product and analytics teams, driving design-led innovation.

Meanwhile, data engineering is becoming foundational to real-time decision-making, as GCCs invest in robust, cloud-native data infrastructure. Although data science continues to be a core function, the focus is gradually shifting toward more specialized, domain-specific analytics, while cloud and infrastructure engineering remains a stable backbone, enabling seamless operations through hybrid models and infrastructure-as-code practices

Top Growth Areas

Job Family	Growth Rate	Key Highlights
.GenAI & Related Areas	32%	Highest annual growth; driven by early adoption in BFSI, retail, and platform firms. Roles like Generative AI Engineer and AI Model Ops Specialist are in high demand. Transitioning from experimentation to scale.
Platform Engineering & SRE	26%	Focused on modernization and resiliency in hybrid/multi-cloud environments. Central to DevOps 2.0 – automation, observability, and high-availability systems.
UI/UX	25%	Embedded in product, analytics, and digital teams. Signifies a shift toward design-led, customer-centric platforms.
Data Engineering	18%	Foundational for real-time ingestion, ETL pipelines, and data infrastructure. Rising demand for cloud data engineers and pipeline architects as analytics matures.
Data Science & Analytics	14%	Stable and maturing. Widely adopted for business analytics, forecasting, and risk modeling. Slower growth suggests a shift from generic to specialized analytics.
Cloud & Infrastructure Engg.	14%	Supporting hybrid infra and infrastructure-as-code. Consistent demand due to cloud-native transformation initiatives across GCCs.

Evolving Priorities

In 2024, Global Capability Centres (GCCs) in India witnessed a slight but notable softening in overall tech talent demand, with requisition volumes declining by an estimated 3–6% quarter-over-quarter. While the GCC ecosystem continues to be a cornerstone of global enterprise strategy, this tapering reflects a strategic recalibration rather than a structural weakness.

While the overall demand trend in GCC hiring has marginally slowed, this is best viewed as a strategic inflection point. The focus is no longer on scaling headcount, but on building capability depth, driving operational leverage, and future-proofing the talent architecture. Organizations that pivot quickly to this new operating model—blending workforce agility, digital-first capabilities, and location diversification—will lead the next wave of GCC evolution.

Demand is not disappearing—it is evolving.

GCCs are prioritizing depth over breadth—investing selectively in high-scarcity, high-impact capabilities like data engineering, cloud architecture, and cyber defense, while optimizing traditional delivery layers

Next-gen roles continue to see momentum.

Demand remains stable to growing in AI/ML, cybersecurity, and multi-cloud engineering, reflecting continued enterprise transformation mandates

Location strategy is being reimagined

Several firms are diversifying into Tier-2 cities, capitalizing on improved infrastructure, local policy incentives, and new talent pools to balance cost, agility, and scalability

Demand for tech talent in GCCs is evolving rather than disappearing, with a focus on high-scarcity, high-impact capabilities such as data engineering, cloud architecture, and cyber defense, while optimizing traditional roles. Next-gen roles continue to grow, with stable to rising demand in AI/ML, cybersecurity, and multi-cloud engineering, driven by ongoing enterprise transformation. Companies are also reimagining their location strategies, with many expanding into Tier-2 cities to leverage improved infrastructure, local policy incentives, and access to new talent pools, balancing cost, agility, and scalability.

In 2024, GCCs saw a significant rise in demand for technology-focused roles, driven by rapid digital transformation across industries. As businesses adopt new technologies, hiring for specialized roles in cloud computing, AI, machine learning, cybersecurity, and data engineering has surged. This reflects the growing emphasis on innovation, security, and data-driven insights. The table below highlights the quarter-on-quarter comparison of hiring trends for these key roles, illustrating shifts in demand as companies adapt to evolving technological and business needs.

Hiring Trends: Quarter-on-Quarter Comparison

Job Family	Key Roles	QoQ Hiring Trend
Cloud & Infrastructure Engineering	• Cloud Architects (AWS/Azure/GCP) • Site Reliability Engineers (SRE) • Network & Infrastructure Engineers	+3% to +5% (Mild Growth)
AI, Data & Analytics	• Data Scientists & ML Engineers • Data Engineers (ETL/ELT) • BI/Analytics Developers	+3% to +5% (Mild Growth)
Cybersecurity & Risk Management	• SOC Analysts & Threat Hunters • Security Architects (Zero Trust) • GRC Specialists	+8% to +10% (Moderate Growth)
IT Governance, Risk & Compliance	• IT Governance Specialists • Risk & Compliance Analysts • Audit & Regulatory Leads	+3% to +5% (Mild Growth)
Software Development & Digital Engineering	• Full-Stack/Web Developers • Frontend/Backend Engineers • Mobile App Developers	-8% to -12% (Noticeable Decrease)
Business & Functional Analysis	• Business Analysts • Process/Functional Consultants • Product Owners	-12% to -15% (Noticeable Decrease)
Enterprise Applications & ERP	• SAP Consultants • Oracle EBS Specialists • ERP Functional Leads	-8% to -10% (Moderate Decrease)
IT Service Management & Digital Operations	• ITSM Specialists (ServiceNow) • NOC/SOC Operators • Platform/Production Support	-8% to -10% (Moderate Decrease)
Digital Transformation & Process Automation	• RPA Developers (UiPath/Blue Prism) • Digital Transformation Leads • Process Automation Analysts	-5% to -8% (Moderate Decrease)

Compensation Trends

As India's GCCs expand their tech workforce, compensation dynamics are shifting rapidly due to talent scarcity, AI-led job transformations, and rising global competition for specialized roles

- Roles with AI, cybersecurity, cloud security, and FinOps expertise are witnessing 20-35% YoY compensation growth due to demand outpacing supply.
- Premium roles such as AI Risk & Compliance, Zero Trust Security, and AI FinOps are commanding 30-50% higher pay scales compared to standard IT roles.
- Hiring in emerging GCC locations (Hyderabad, Pune, Ahmedabad, Coimbatore, etc.) is creating regional salary variations, with Bangalore retaining its compensation premium leadership.
- Skill premium variations exist within job families, as multi-cloud, AI governance, and AI observability skills attract higher salaries than traditional IT expertise.

Compensation Trends by Key GCC Roles (4–8 Years Experience)

Role	Bangalore	Hyderabad	Pune	Chennai	Tier-2 Cities
AI & Data Science Engineer	35.3–47.9	33.1–45.0	31.0–41.2	30.0–40.3	27.6–33.9
Cloud Security Engineer	30.6–41.7	28.7–38.2	26.2–36.2	26.2–35.1	24.0–33.5
FinOps Specialist	32.8–46.2	31.0–42.9	29.2–39.4	27.6–38.0	25.9–37.0
AI Compliance & Risk Ops Engineer	38.7–52.1	36.0–50.1	34.3–48.1	32.8–47.1	Talent Not Readily Available
DevSecOps Engineer	36.2–50.2	34.3–48.1	32.8–46.0	30.9–43.0	29.4–36.9
Full-Stack Development	24.0–34.0	22.1–32.5	20.5–30.3	18.9–29.4	17.0–28.2
Zero Trust Security Engineer	38.7–57.1	36.0–51.9	34.3–50.2	32.8–49.1	Talent Not Readily Available
AI Observability Engineer	38.1–52.1	36.0–50.1	34.3–48.1	32.8–47.1	Talent Not Readily Available
Site Reliability Engineer (SRE)	34.0–47.0	32.0–44.5	30.0–42.0	28.5–40.0	Talent Not Readily Available
UI/UX Designer	26.0–38.0	24.0–35.5	22.5–33.0	21.5–32.0	20.0–30.0
Cloud Infrastructure Engineer	32.5–44.0	30.5–42.0	28.5–39.0	27.0–37.0	25.0–34.0

Tech Roles with Premium Pay

Skill-based Premium Compensation		
Role Family	**Normalized Compensation Premium (%)**	**Primary Drivers of Premium Growth**
AI & Data Science	25–40%	AI-first GCC transformation, AI-driven risk analytics
Cloud Security & Zero Trust	25–35%	BFSI & Telecom security mandates, AI-powered security automation
AI FinOps & Cloud Cost Optimization	22–35%	Multi-cloud cost management, AWS/Azure FinOps demand
AI Observability & AI Reliability	20–32%	AIOps, AI-driven monitoring, cloud governance
Blockchain & Web3 Engineering	20–30%	BFSI investment in decentralized finance & smart contracts
AI-Driven Risk & Compliance	25–40%	Regulatory compliance automation, digital banking transformation

Decoding Salary Premium Patterns

Observations from the data reveal that certain roles within Global Capability Centres (GCCs) are associated with premium salaries due to their specialized expertise and high demand in key technological areas. These roles, which are critical to driving innovation and digital transformation, command higher compensation packages. The following points highlight specific roles that have been identified as offering premium salaries, reflecting their importance in the evolving business landscape.

- AI & Data Science engineers are now earning 25-40% more than traditional software engineers, making it the highest-paid technical job family in GCCs
- Cloud Security and Zero Trust Security roles have surpassed traditional cybersecurity salaries, as AI-powered security expertise becomes a must-have for BFSI and Telecom GCCs
- AI-driven cost optimization roles (AI FinOps) are now among the highest-compensated cloud roles, as GCCs seek to reduce multi-cloud expenses through automated FinOps solutions

Rise of Tier 2: India's Next Talent Frontiers

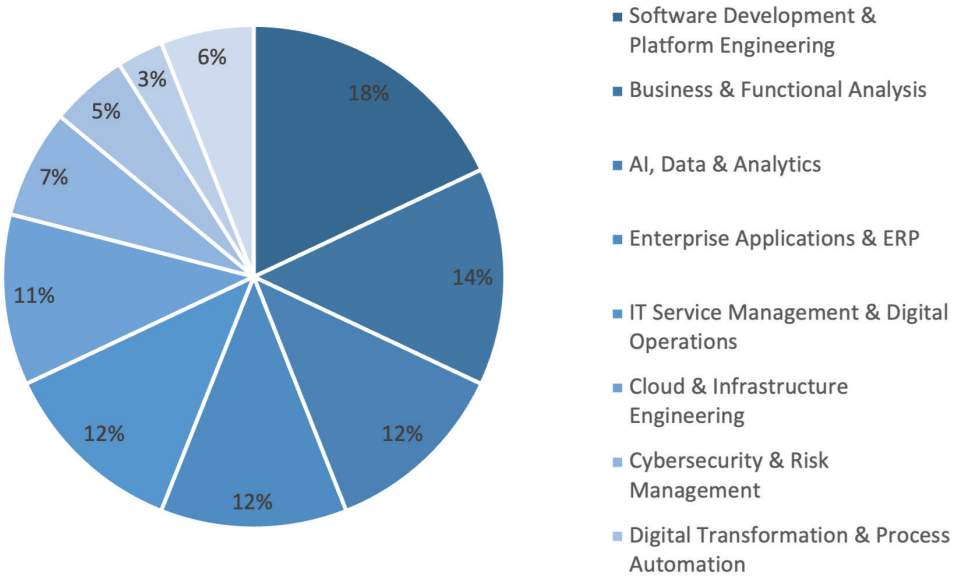
The hiring landscape reveals that while core engineering, data, and cloud roles continue to be concentrated in Tier 1 cities, there is a noticeable emergence of demand in Tier 2 locations for process-oriented and operations-led roles. Functions like business analysis, ERP, service management, and governance are seeing growing traction in smaller cities, driven by the maturity of delivery models and the potential for cost optimization.

Positioning of Tier 2 Cities

City	Positioning	Primary Drivers of Premium Growth
Kochi	Delivery and Risk Operations Hub	Kochi is experiencing strong demand in professional services, healthcare operations, and cybersecurity. Its talent pool in BPS and risk management makes it a preferred choice for GBS and compliance-focused setups.
Ahmedabad	Mid-Tier Engineering and Domain Center	Ahmedabad is emerging as a key location for manufacturing-linked IT, automation, and travel-tech functions. Its engineering talent base and stable workforce make it suitable for product engineering and support roles.
Coimbatore	Industrial Tech and Cloud Support Center	Coimbatore is building strength in automotive, industrial technology, and cloud operations. It is increasingly being considered for engineering CoEs and IoT-led factory digitization initiatives.
Indore	GRC and Shared Services Location	Indore is well-positioned for GRC, financial operations, and healthcare analytics. The city offers strong academic infrastructure, cost efficiency, and mature talent readiness.
Jaipur	BFSI and eCommerce Technology Cluster	Jaipur is showing momentum in BFSI tech, credit risk, and eCommerce-related development. It is gaining relevance for digital banking and product engineering teams.
Chandigarh & Bhubaneswar	Specialist Hubs for Pharma IT and Embedded Systems	Chandigarh supports niche roles in pharma IT and MedTech analytics, while Bhubaneswar is attracting early-stage engineering services and embedded systems functions.

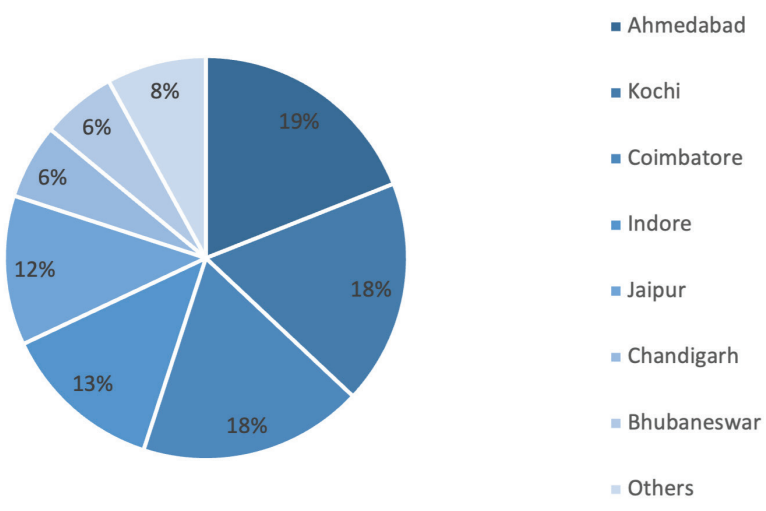
The distribution of tech job families across Tier-2 locations for GCCs in India offers a comprehensive overview of talent composition in these emerging hubs. The chart illustrates the relative share of various functions within the workforce, emphasizing the increasing diversification of tech skills in these regions. The data highlights how GCCs are expanding beyond major cities, with specific job families gaining momentum in Tier-2 locations.

Location Spread



Job demand composition in Tier-2 locations for GCCs in India provides valuable insights into the distribution of tech roles across these emerging regions. The chart highlights how GCCs are increasingly turning to Tier-2 cities to source specialized talent. This data underscores the evolving workforce dynamics as these cities become pivotal hubs for specific job demands within the GCC sector.

Tier 2 Location wise Demand composition



Tech Talent Dynamics and Supply Gaps

India's GCCs are scaling operations across AI, cybersecurity, cloud, data science, and digital transformation, but critical skill shortages persist, slowing down hiring velocity. The demand for AI, cloud security, and fintech expertise is outpacing supply, creating bottlenecks in workforce expansion.

This section provides an in-depth analysis of the talent supply-demand gaps, including high-demand job families, role-based hiring trends, cross-skill transition opportunities, and hiring velocity metrics.

Talent Supply Gap			
Role	**Supply Gap (%)**	**Primary Hiring Sectors**	**Key Technical Skills Required**
AI & Data Science Experts	30%	BFSI, Retail, Healthcare, SaaS	Python, TensorFlow, ML, NLP, MLOps
Cybersecurity & Zero Trust Engineers	35%	BFSI, Telecom, Healthcare	Zero Trust Security, IAM, Cloud Security
AI for Risk & Compliance	35%	BFSI, Digital Banking, FinTech	AI-driven Risk Models, RegTech, Anti-Fraud AI
FinOps & Cloud Cost Optimization Specialists	45%	BFSI, Retail, SaaS	Cloud Cost Governance, AWS Cost Explorer, Azure FinOps
Cloud Security & DevSecOps Engineers	22%	BFSI, SaaS, Manufacturing	Kubernetes Security, DevSecOps, Identity & Access Management (IAM)
AI-Powered IoT & Predictive Maintenance Engineers	28%	Automotive, Manufacturing, Energy	Edge Computing, AI-Driven Maintenance, IoT Platforms
Full-Stack Developers (AI-Integrated Applications)	22%	SaaS, Retail, BFSI	Java, Python, React, Angular, AI-based APIs
AI Observability & AI Reliability Engineers	35%	BFSI, SaaS, Telecom	AIOps, AI Model Monitoring, Cloud Observability
Blockchain & Web3 Developers	30%	BFSI, Digital Lending, FinTech	Solidity, Ethereum, Smart Contracts, Crypto Security

Fast-Filling vs. Hard-to-Find Tech Roles

The following table provides an overview of the top industries in GCCs, highlighting the fast-filling tech roles that are typically filled in less than 45 days, as well as the most difficult roles to fill, which often take more than 60 days. It offers insights into the demand and challenges faced by GCCs in sourcing talent across different sectors, reflecting trends in the speed of hiring and the complexity of fulfilling specialized skill requirements in the workforce.

Positioning of Tier 2 Cities		
Industry	**Role Filling Duration by Industry**	**Most Difficult to Fill Roles (≥ 60 Days)**
BFSI	Risk Analysts, Data Engineers, SQL Developers, Java Backend Developers, Business Analysts	Cybersecurity Engineers, Model Validation Experts, Financial Crime Analysts, Quant Developers, Cloud Security Architects
Retail & eCommerce	Full-Stack Developers, Data Analysts, Salesforce Admins, Frontend Engineers, Support Analysts	Supply Chain Tech Architects, FinOps Specialists, Personalization & Recommendation Engineers, SREs, Platform Engineers
Healthcare & Pharma	Clinical Data Analysts, QA Testers, ETL Developers, DevOps Engineers, L2 Application Support	Regulatory Tech Experts, HL7 Integration Specialists, Healthcare Data Scientists, Cloud Architects (HIPAA-compliant), GenAI Engineers
Telecom & Media	API Developers, Java Microservices Engineers, Automation Testers, Linux Admins, DevOps Specialists	5G Network Engineers, Video Compression Experts, Cloud Infra Engineers, Broadcast Systems Engineers, AI/ML Specialists (Media)
Manufacturing & Auto	Embedded Software Engineers, Firmware Developers, Electrical CAD Designers, IT Support Engineers, Data	IoT Platform Architects, Digital Twin Engineers, Functional Safety Specialists, Robotics Engineers, Predictive Maintenance Leads

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