ZYOIN GROUP

Building India's $10 Trillion Economy Through Distributed Excellence

From Criticism to Collaboration

Beyond Bengaluru & Hyderabad

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Why India's tech ecosystem needs more cities to match Bengaluru's vibrancy—not fewer

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The Narrative We Need to Rewrite

Bengaluru has been under siege—not from competition, but from criticism. Headlines decry its traffic, its infrastructure gaps, its strained public systems. Business leaders voice frustrations on social media, and the discourse spirals into blame games between industry and government.

But here's what the critics miss: Bengaluru's problems are symptoms of unprecedented success. When a city hosts 875 GCC Units, employs 1.65 million technology professionals, and nurtures 53 unicorns—more than any other Indian city—growing pains are inevitable. The question isn't whether Bengaluru is failing; it's whether India can replicate this success elsewhere fast enough.

India's ambition to become a $10 trillion economy by 2030-35 doesn't hinge on solving Bengaluru's traffic. It hinges on building ten more Bengalurus.

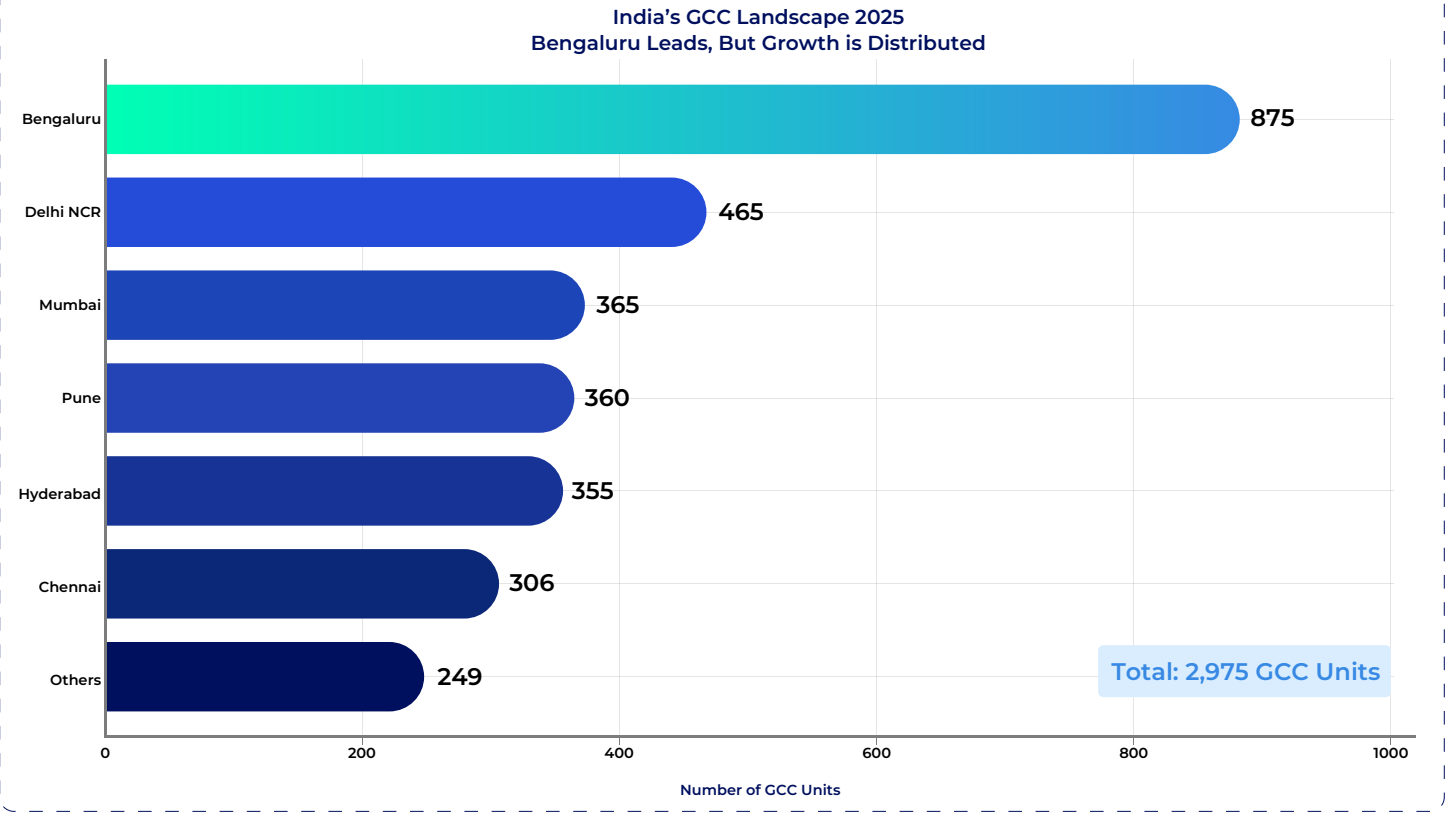
875
GCC UNITS

1.65M
TECH PROFESSIONALS

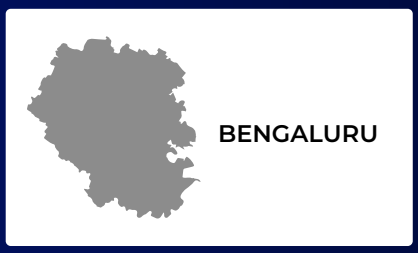
53
UNICORNS

The Numbers Tell a Remarkable Story

India's technology ecosystem has reached a scale that demands acknowledgment. With 2,975 GCC Units employing over 1.9 million professionals and generating $65 billion in annual revenue, India hosts 50% of all global capability centers worldwide. The ecosystem's total economic impact—direct, indirect, and induced—approaches $241 billion, contributing nearly 2% to national GDP.

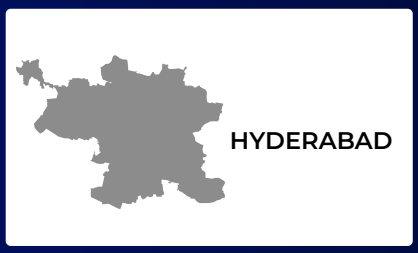


Consider the city-wise distribution of this remarkable engine:

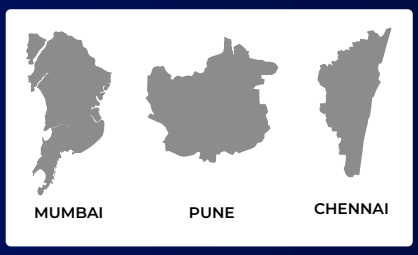


Bengaluru leads with 875 GCC Units, 1.65 million tech professionals (0.6% YoY growth), $79 billion in startup funding since 2010, 53 unicorns (44% of India's total), and 2,443 funded startups since 2015.

Delhi-NCR follows with 465 GCC Units, 1.25 million tech workers (0.9% YoY growth—the fastest among metros), $46.5 billion in funding, 44 unicorns, and 2,069 funded startups since 2015.

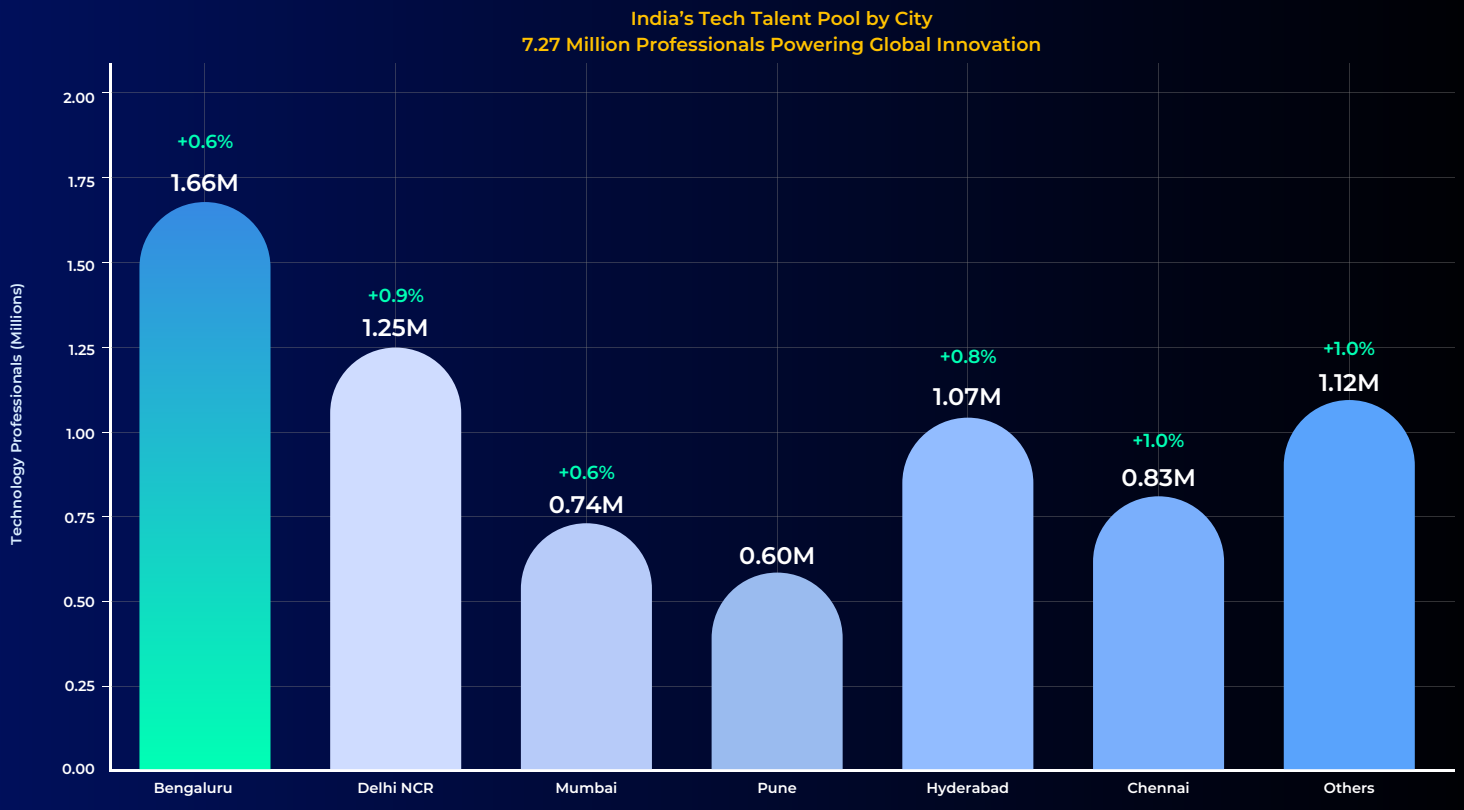


Hyderabad has emerged as the dark horse—355 GCC Units, over 1 million tech professionals (0.8% YoY growth). Its proactive policies through TS-iPASS have made it the preferred alternative for GCC expansion.



Mumbai, Pune, and Chennai collectively contribute 1,031 GCC Units and 2.18 million professionals, each with distinct strengths—Mumbai in BFSI, Pune in engineering R&D, Chennai in manufacturing and automotive technology (with Chennai showing 1.0% YoY talent growth).

Together, these six metros host 92% of India's GCC Units. But that concentration is precisely the vulnerability India must address.

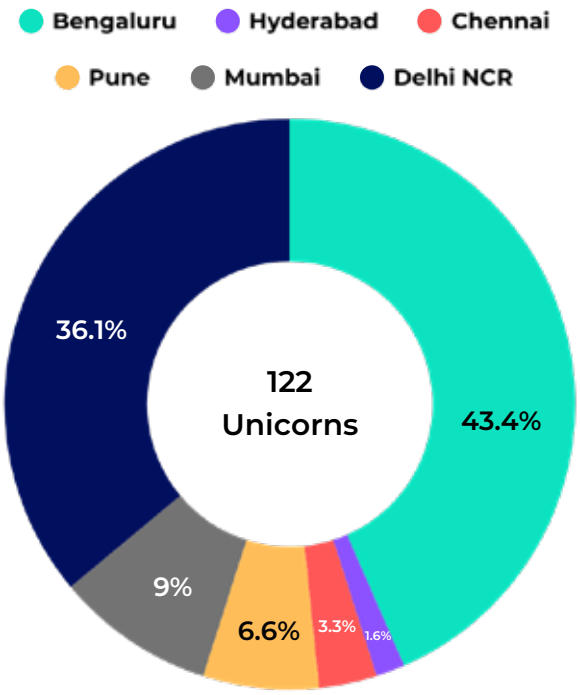


Why Bengaluru Will Continue to Lead And Why That's Not Enough

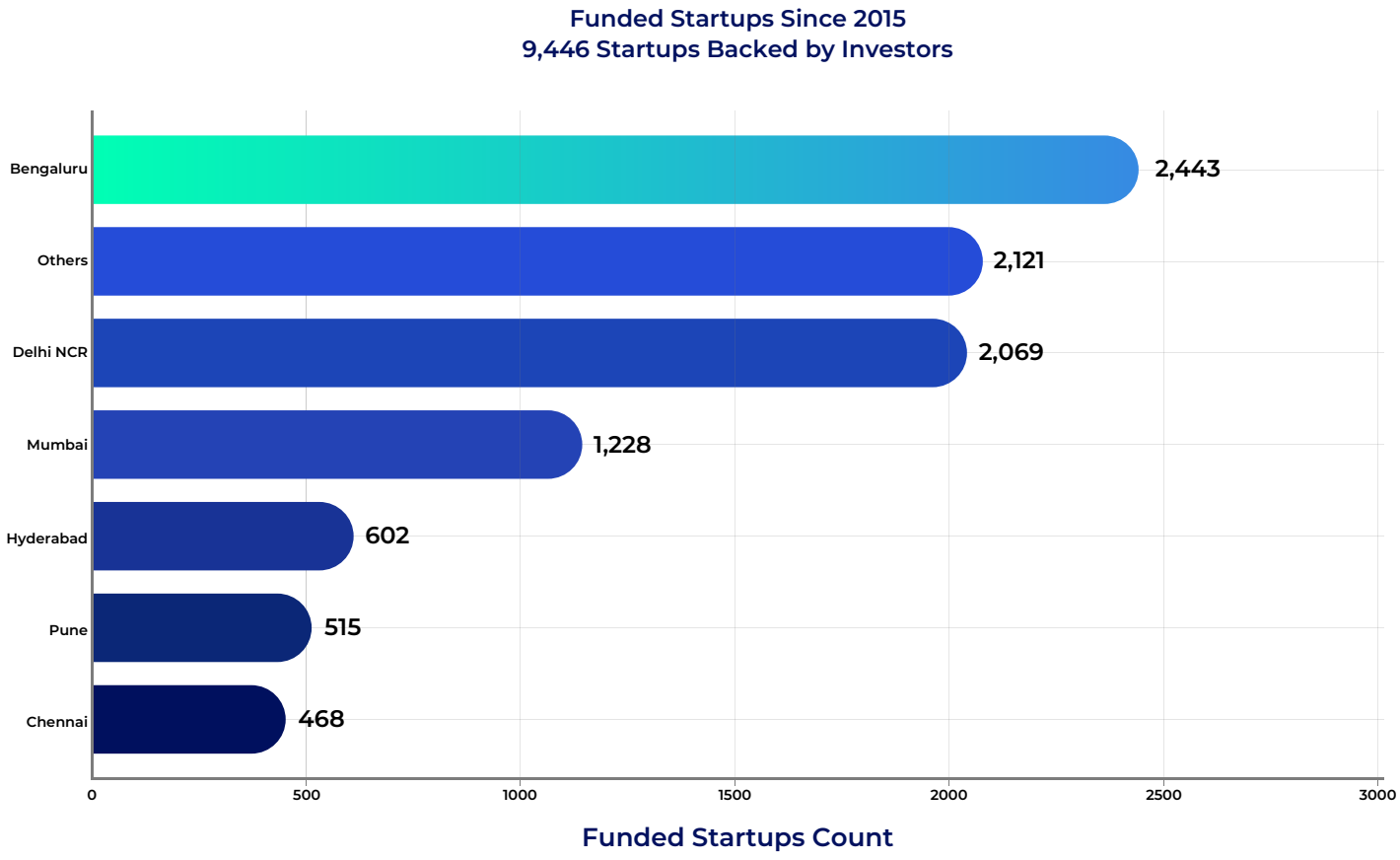
Despite the criticism, Bengaluru isn't slowing down. In 2025, one-third of all new GCC Units in India still chose Bengaluru as their launchpad. The reason is simple: ecosystem depth cannot be replicated overnight.

Bengaluru offers what no other Indian city can match yet: 2,443 funded startups since 2015 creating a dense network of innovation, proximity to premier institutions like IISc and IIMs, the deepest talent pools in AI, cloud, and product engineering, and two decades of institutional knowledge in running global operations. When AstraZeneca invests ₹166 crore to expand its Global Hub here, or when Guidewire doubles down on its Bengaluru presence, they're not ignoring the infrastructure challenges—they're prioritizing ecosystem access.

The Karnataka government's ₹19,000 crore commitment to tunnel corridors, metro expansion, and Brand Bengaluru initiatives signals recognition that this engine must keep running. But here's the strategic insight: Bengaluru's ceiling is India's ceiling. If India's tech story remains a single-city narrative, we cap our potential at the carrying capacity of one urban system.



India's 122 Unicorns
Bengaluru: 43.4% of Total



The Distributed Excellence Imperative

India's path to $10 trillion runs through distributed innovation. The numbers support this trajectory: Tier-2 cities continue to gain momentum as GCC destinations. Cities like Coimbatore (60+ GCC Units, 75,000 professionals), Kochi, Ahmedabad, and Mysuru are no longer secondary options—they're strategic frontiers.

The economics are compelling: 25-30% lower operational costs, 10-15% lower attrition, shorter commutes, and fresher talent pools. Over 215 GCC Units now operate in emerging locations, and mid-market GCCs—the transformation hubs of tomorrow—are 1.5x more likely to establish in Tier-2 cities.

This isn't about abandoning metros; it's about de-risking India's value proposition. When global enterprises can access Bengaluru-caliber talent in Coimbatore or Jaipur, India becomes a more resilient, scalable, and attractive destination. The 2025 Union Budget's national GCC framework recognizes this, extending focus beyond metro hubs.

From Criticism to Collaboration: A Blueprint

The public spats between industry leaders and government officials serve no one. Leader's frustrations about Bengaluru's roads are valid; so is the recognition that decades of underinvestment cannot be reversed overnight. What's needed is a collaborative framework that channels criticism into action:

First, state governments must compete on infrastructure, not just incentives. Karnataka's GCC policy and Beyond Bengaluru initiative are being mirrored by Telangana, Maharashtra, and Tamil Nadu. This competition benefits everyone.

Second, industry must invest in Tier-2 expansion, not just advocate for it. Every enterprise that establishes a capability center in Mysuru or Indore expands India's capacity to absorb global demand.

Third, public-private partnerships for urban development must scale. The Traffic Quality Index developed in Bengaluru, leveraging 15 years of data and AI, exemplifies the innovation possible when industry and government align.

Fourth, invest in human capital at the source. India produces 1.5 million engineers and 2 million STEM graduates annually. Skilling initiatives that reach Tier-2 and Tier-3 cities create the talent density that attracts GCCs.

The $10 Trillion Question

By 2030, India's GCC sector is projected to reach $150 billion+ in revenue, employ 4 million+ professionals, and host 2,500+ capability centers. This growth will either concentrate in existing hotspots—straining infrastructure and capping potential—or distribute across a network of vibrant tech ecosystems.

The BCG-Matrix Partners report is clear: India's $10 trillion journey will be fueled by manufacturing in semiconductors, EVs, and renewable energy—sectors that require distributed facilities, not just service hubs. The IMF identifies India as a "bright light" in the global economy precisely because of its capacity to scale.

Bengaluru's critics are right that the city needs better infrastructure. But they miss the larger point: India needs more cities with Bengaluru's vibrancy—cities so successful that their success strains their systems. Hyderabad, Chennai, Pune, and Delhi-NCR are approaching that threshold. Coimbatore, Kochi, and a dozen others are building the foundations.

The path from criticism to collaboration runs through a simple recognition: we're not competing against each other. We're racing against time and global competition to build the distributed excellence that transforms India from a $3.5 trillion economy to a $10 trillion powerhouse.

India's Path to $10 Trillion

The Distributed Excellence Imperative

2,975
GCC Units
Accross India

7.27M
Tech Talent
Professionals

$170B
Funding
Since 2010

122
Unicorns
Created

9,446
Funded Startups
Since 2015

2500+
GCCs by 2030
Expanding Footprint

4M+
Professionals by 2030
Talent Multiplication

$150B+
Revenue by 2030
Massive Opportunity

"India needs more cities with Bengaluru's vibrancy"

Bengaluru has shown what's possible. Now, India must multiply that possibility—not replace it.

Data sources: Ecosystem analysis across key Indian metros; NASSCOM-Zinnov GCC Landscape Reports; BCG India Reports; foundit Insights Tracker 2025