

An architectural rendering of a modern urban development at dusk. The scene features several large, multi-story glass-fronted buildings with illuminated interiors and green roofs. These buildings are surrounded by lush greenery, including trees and landscaped gardens with winding paths. In the foreground, a road with a few cars is visible. In the background, an airport runway and a control tower are visible under a twilight sky with a few birds in flight. The overall atmosphere is one of a vibrant, sustainable, and modern city environment.

ARCHITECTING ADVANTAGE

Bengaluru Airport City and the New Economics
of India's GCC Ecosystems

VIKSIT BHARAT @ 2047

NITI Aayog's approach paper sets the destination: a developed India by the centenary of independence. The arithmetic behind it is unforgiving — and it is the reason this conversation matters.

USD 30 tn

TARGET ECONOMY BY 2047

USD 18,000

PER CAPITA INCOME

7–10%

SUSTAINED ANNUAL GROWTH

Held for two to three decades without interruption

2047

THE CENTENARY YEAR

100 years of independence — the deadline is fixed

WE WON'T REACH \$18,000 PER CAPITA BY MERELY ADDING TALENT TO THE ROSTER. WE REACH IT BY MAXIMIZING THE OUTPUT OF EVERY INDIVIDUAL.

THE ARC OF THIS CONVERSATION

ONE AMBITION, THREE ALTITUDES



01

THE WORLD

As intellectual capital and R&D decentralize globally, geographic boundaries have dissolved into a single, continuous work ecosystem.



02

INDIA

The epicenter of this shift is India. Hosting more than 50% of the world's Global Capability Centers, the nation serves as the primary engine driving value creation, innovation, and a \$30 trillion economic vision.



03

BENGALURU

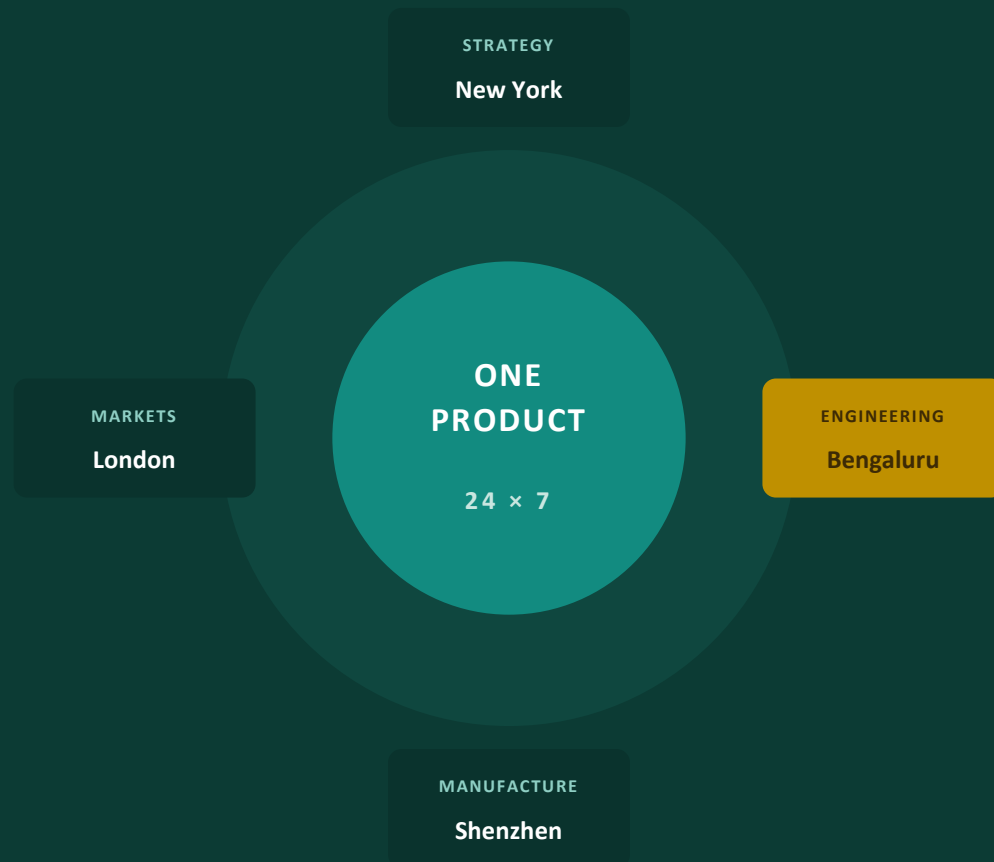
And within India, one city concentrates the talent and anchors the capital — with one address now being purpose-built for what comes next.

Stop asking where work is cheapest. Start asking where the future is being built.

THE STRUCTURAL SHIFT

THE WORLD BECAME ONE WORKPLACE

A product is now designed in one time zone, engineered in a second, tested in a third and shipped everywhere at once. The capability centre is the institution that made that ordinary.



Talent stopped needing to move.

For a century, capability migrated to capital. The capability centre reversed it — the mandate now travels to where the talent already lives.



The clock became an asset.

Distributed teams turned time zones from a coordination cost into a continuous development cycle. Handover replaced downtime.



Ownership followed the work.

What began as execution became authorship. Products, platforms and intellectual property are now originated outside headquarters.



Proximity still decides quality.

Yet the work itself clusters tightly. Global reach is built on dense local ecosystems — the village is worldwide, the neighbourhoods are not.

Cities shown are illustrative of a distributed operating model, not a specific company's footprint.

FOUR DECADES, FOUR OPERATING MODELS

HOW DISTANCE STOPPED MATTERING

01

1990s – 2000s

THE COST CENTRE

Captive back-offices on leased floors. Payroll, transactions, IT support. Value equals labour arbitrage.

DRIVER · COST

02

2010s

GRADE-A & IT PARKS

Migration into managed parks and IT-SEZs. Engineering, analytics and shared services widen the mandate.

DRIVER · SCALE

03

LATE 2010s – 2020s

THE CAPTIVE CAMPUS

Owned, built-to-suit campuses with brand and amenity. Where most of the industry still sits today.

DRIVER · OWNERSHIP

04

NOW → 2030

THE INTEGRATED CITY

Work – Play – Live – Learn – Create districts. Work needs an ecosystem around it, not an enclosure around itself.

DRIVER · CAPABILITY

LABOUR ARBITRAGE →

→ OWNERSHIP OF CAPABILITY

THE GLOBAL PICTURE

A HALF-TRILLION-DOLLAR OPERATING MODEL

The capability centre is no longer a sourcing tactic. It is a mainstream way for large enterprises to organise themselves — and it is concentrating, not dispersing.

USD 601 bn

GLOBAL GCC MARKET, 2025

projected to reach USD 886 bn by 2030 at roughly 8% CAGR

> 53%

OF THE WORLD'S GCCs ARE IN INDIA

the single largest concentration of captive capability anywhere on earth



70%

of India's GCC demand from 2018–2025 came from US-headquartered enterprises



506

Forbes Global 2000 companies operate a capability centre in India



~1.5 mn

engineering graduates enter India's talent pool annually - One of the world's deepest technical talent pipelines



8.06%

projected global GCC market CAGR to 2030, reflecting the continued shift from cost arbitrage to strategic capability.

The location decision has moved from procurement to the boardroom. What enterprises are buying is no longer labour capacity—it is capability density.

THE CAPABILITY CAPITAL OF THE WORLD

2,117



GCCs in India

operating across 3,728 individual units

2.36 mn



Professionals employed

the largest captive talent base on earth

USD 98.4 bn



Market revenue, FY2026

the size of the industry — see the previous slide

506



Forbes Global 2000 firms

with a capability centre established in India

~250,000



AI and ML professionals

India is the world's largest AI hiring market

+32%



Growth in centre count since FY2021

583 mid-market and 504 PE-backed centres

FOUR DIFFERENT MEASURES. FOUR DIFFERENT QUESTIONS.

01	MARKET REVENUE What India's capability centres bill in total — the gross size of the sector.	USD 98.4 bn FY2026	"How big is the industry?"
02	EXPORT REVENUE The portion billed to overseas parents. A subset of revenue; it is what shows up in the balance of payments.	USD 64.6 bn FY2024	"What does it earn the country in foreign exchange?"
03	GROSS VALUE ADDED Revenue minus bought-in goods and services. This — not revenue — is what actually enters GDP.	USD 68 bn FY2025	"What does it contribute to the economy?"
04	TOTAL ECONOMIC FOOTPRINT Direct GVA plus supply-chain and consumption effects. A wider impact estimate, not a GDP line item.	USD 182 bn FY2025	"What does it set in motion around it?"

CLOSING THE LOOP

WHY THIS SECTOR IS A VIKSIT BHARAT LEVER

The 2047 target is a productivity problem before it is a growth problem.

VALUE ADDED / INCOME PER PERSON, USD

GCC employee, FY2025



National average



Viksit Bharat 2047 target



Opportunity

The productivity benchmark already exists.

A capability-centre employee generates roughly 1.8 times the per-capita income India is aiming for two decades from now. The destination exists — it is just not yet at scale.

Scale is the unfinished work.

2.36 million people is under 0.5% of India's workforce. The lever is real but narrow; widening it is a question of talent supply, and of places capable of absorbing that talent.

A developed India needs more high-productivity work, done by more people, in more places. This sector is the clearest existing example of what that looks like — which makes where it grows next a national question, not a corporate one.

INDIA LEADS THE WORLD. BENGALURU LEADS INDIA.

34–39%

of all India GCC market activity
JLL India GCC Guide 2026

900+

GCC units operating in the city
the highest count of any city on earth

~36%

of India's total GCC workforce
roughly 660,000 professionals

~40%

of India's GCC engineering R&D talent
the deepest ER&D bench in the country

~50%

of India's AI and ML talent
concentrated in one metropolitan area

66

new GCCs opened in H1 2026 alone
33 in Q1, more than 30 in Q2

Karnataka holds roughly 35% of India's GCC workforce and more than 2.1 million digitally skilled professionals. Nasscom–Zinnov measures Bengaluru's share of the national ecosystem at a steady 29% from FY24 to FY26 — the city is not losing ground; the market around it is simply getting larger.

Next-gen GCCs are innovation engines —
and they gravitate to ecosystems that
supply talent, space, connectivity and
trust at critical mass.



Talent
AI & leadership depth



Space
Grade-A floor plates



Connectivity
Infra & transit access



Trust
Enabling policy & security



THE ANATOMY OF A TRUE INNOVATION ECOSYSTEM

"SIX INGREDIENTS MUST SIT WITHIN REACH OF ONE ANOTHER. DISTANCE IS THE ENEMY OF INNOVATION."



01

TALENT & RESEARCH

Great Universities

Talent pipelines & frontier research at the core of continuous breakthrough capability.



02

COMMERCIAL PACE

Anchor Companies

Global firms that pull talent, validate tech at scale, and set the pace for the market.



03

CAPITAL DEPLOYMENT

Risk Capital

Venture & growth funding within arm's reach to accelerate high-risk ideas to market.



04

ENTERPRISE CREATION

Startups & Founders

Agile spin-outs and bold founders that turn fundamental research into tangible products.



05

MARKET ACCESS

Global Connectivity

Direct physical and digital links to global demand, international capital, and key markets.



06

TALENT RETENTION

Livability & Wellness

Vibrant infrastructure and quality of life where world-class talent wants to live, not just work.

CASE STUDY

SILICON VALLEY ECOSYSTEM

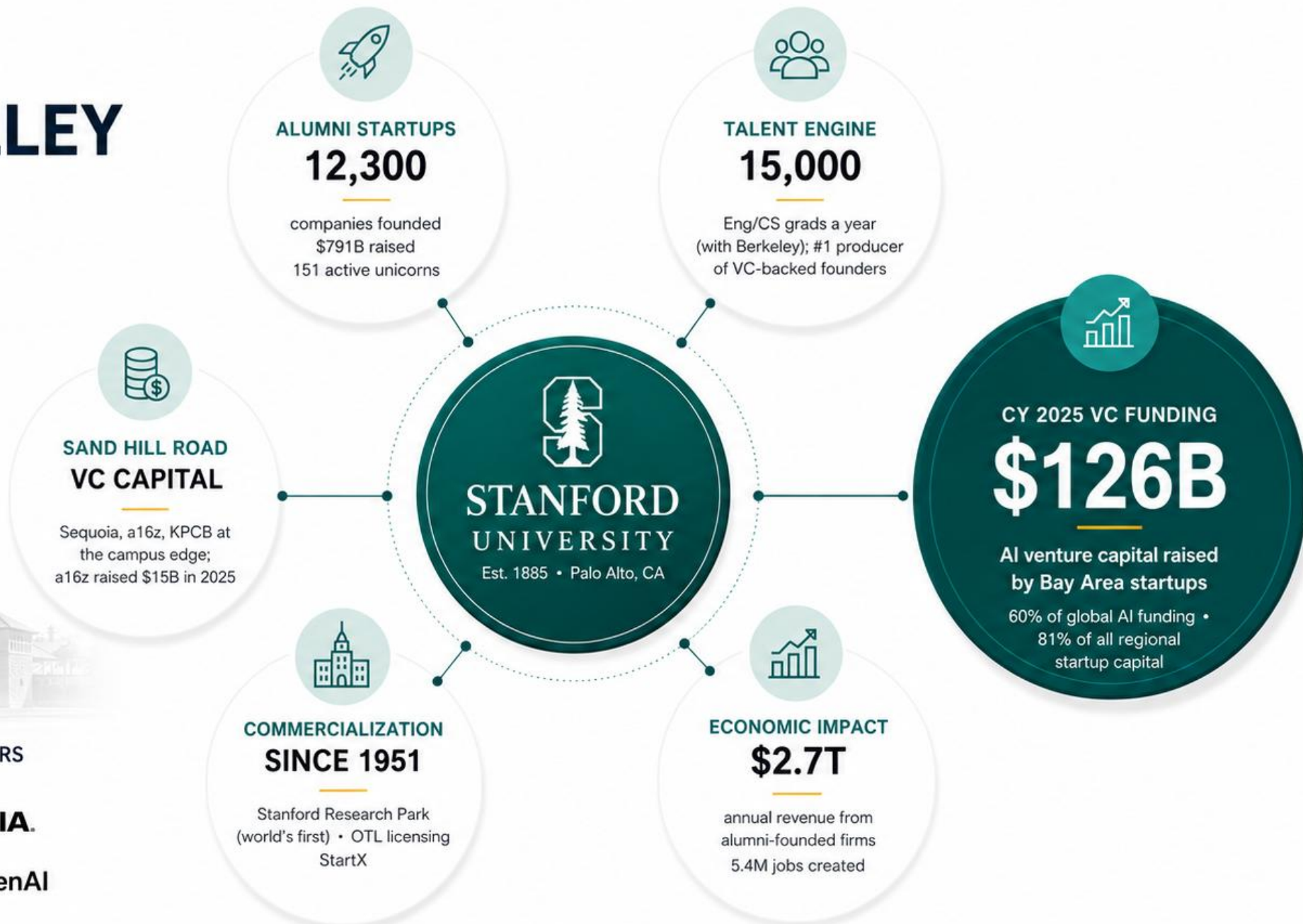
*Stanford is the campus.
What grew around it is
the ecosystem.*



HOME TO GLOBAL INNOVATION LEADERS



Sources: Crunchbase / HumanX (2025 AI VC report); PitchBook; Tracxn; Stanford University economic impact study; Startup Genome 2025



AI is becoming physical infrastructure

The next AI advantage will be won in land, power, cooling, data networks and intelligent operations — not software alone.

THE PHYSICAL STACK BEHIND AI

AI WORKLOAD

has an address

Behind every model sit sites, megawatts, cooling loops, fibre routes and 24x7 operations.

COMPUTE × POWER × PLACE

AI DEMAND

MODEL

- 01 COMPUTE**
GPU clusters • cloud • edge
- 02 DATA-CENTRE SHELL**
land • floorplates • security
- 03 FIRM POWER + BESS**
renewables • grid • storage
- 04 COOLING + WATER**
thermal loops • reuse • resilience
- 05 OPERATIONS LAYER**
digital twins • predictive control

WHY IT MATTERS

~945 TWh

global data-centre electricity use projected by 2030

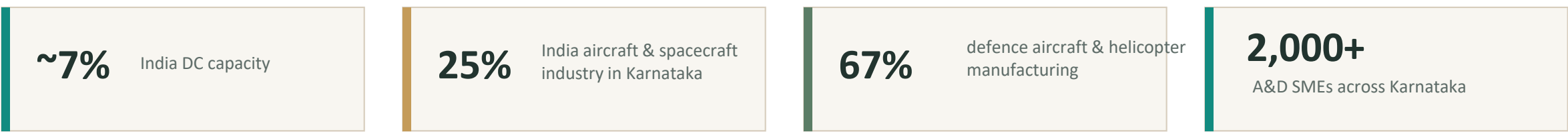
>2× 2024 use

IMPLICATION

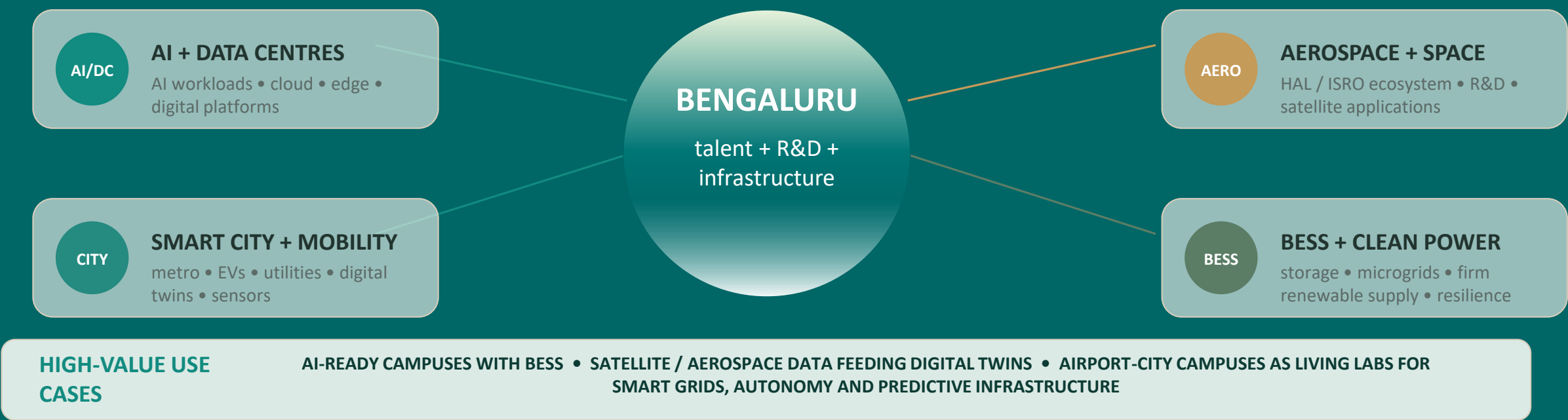
WINNING INFRASTRUCTURE MUST BE DESIGNED AS ONE SYSTEM:
COMPUTE + CLEAN FIRM POWER + STORAGE + CONNECTED PLACE + INTELLIGENT OPERATIONS.

Bengaluru can be the integration testbed

Few cities combine AI talent, data-centre demand, aerospace / space capability, engineering R&D, mobility challenges and clean-energy innovation at this density.



BENGALURU INTEGRATION



Sources: CBRE India (Nov 2025); Invest Karnataka Industrial Policy 2025–30 and Aerospace & Defence sector profile. Karnataka statistics used as the regional base for Bengaluru’s aerospace ecosystem.

A campus houses a company
An ecosystem grows an industry

The future belongs to those who build the second.

Bengaluru Airport City

Developed by Bengaluru Airport City Limited (BACL) - A wholly owned subsidiary of Bangalore International Airport Ltd.



An International Gateway to a
Sustainable Smart and Vibrant City,
celebrating a Culture of Innovation





INDIA'S 3RD
BUSIEST
AIRPORT



SATURATION
CAPACITY
~ 105 MPPA



INDIA'S 1ST & ONLY
5 STAR SKYTRAX
RATED TERMINAL



KEMPEGOWDA INTERNATIONAL AIRPORT BENGALURU

owned & operated by

BANGALORE INTERNATIONAL AIRPORT LTD.

74%
CANADIAN FUND
FAIRFAX FINANCIAL HOLDINGS

26%
GOI &
GOK

SHAREHOLDING



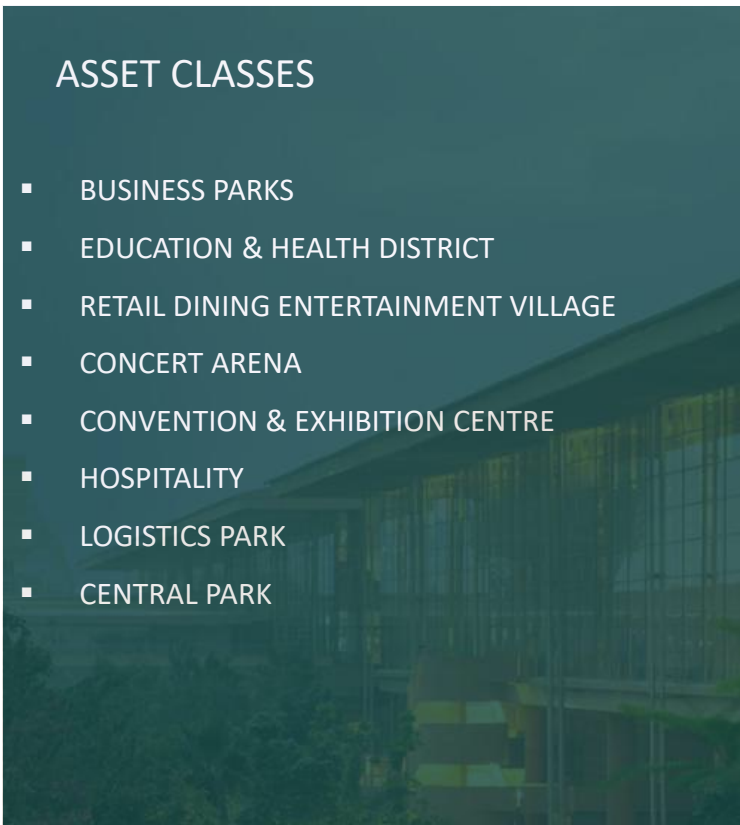


BLR AIRPORT: INDIA'S 3RD BUSIEST AIRPORT connecting

33
INTERNATIONAL DESTINATIONS

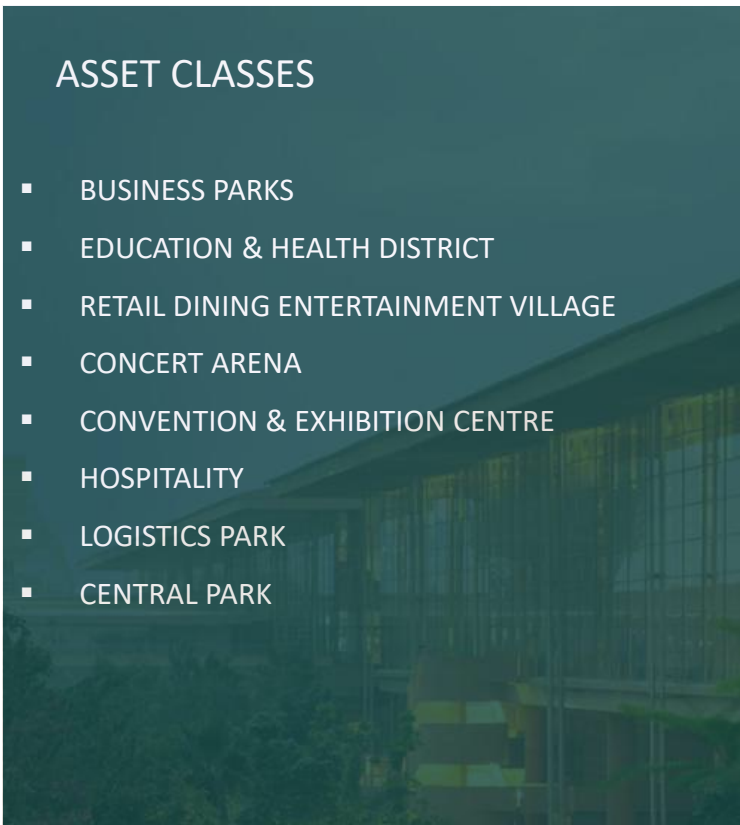
77
DOMESTIC DESTINATIONS



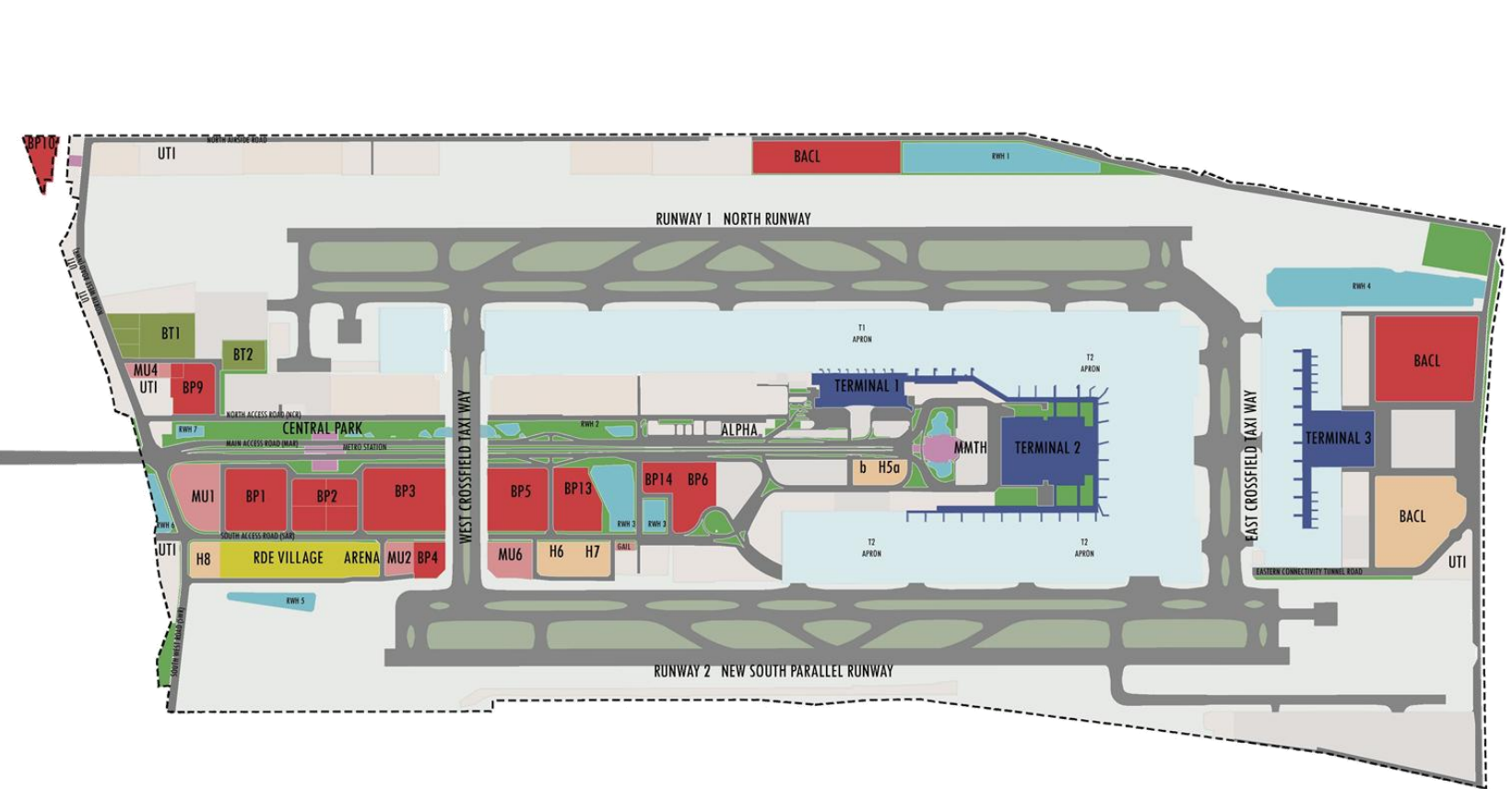


ASSET CLASSES

- BUSINESS PARKS
- EDUCATION & HEALTH DISTRICT
- RETAIL DINING ENTERTAINMENT VILLAGE
- CONCERT ARENA
- CONVENTION & EXHIBITION CENTRE
- HOSPITALITY
- LOGISTICS PARK
- CENTRAL PARK

- 
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LAND USE ALLOCATION	ACRES
Business Parks	241
Hospitality	42
Retail Dining & Entertainment	23
Others (Logistics Park, Education & Health District, Corporate Retreat etc.)	157
TOTAL	463



CITY AS A
GARDEN



CITY AS A
CELEBRATION

BUSINESS PARKS

at Bengaluru Airport City

where nature meets the future of work



AIMING TO BECOME **NATION'S
LEADING** GCC ECOSYSTEM



DEVELOPMENT OF 28 MILLION SFT OF BUSINESS
PARKS OVER THE TIME, STARTING WITH THE FIRST
PHASE OF 2 MILLION SFT





URBAN FOREST

The Lush Urban Forest

Wellbeing is not a perk. It is an input to innovation. The best ideas come from rested, healthy, engaged minds — and the world's leading campuses now design for exactly that.



OTHER DEVELOPMENTS @ BENGALURU AIRPORT CITY
creating an integrated ecosystem

370
KEYS



HOSPITALITY DISTRICT @ BENGALURU AIRPORT CITY

demand up to

5200 keys

Operational + in progress

1145 keys

775 KEYS



INTEGRATED ECOSYSTEM @ BENGALURU AIRPORT CITY



CONVENTION & EXHIBITION, HOSPITALITY, RETAIL DINING



775 KEYS COMBO HOTEL



RETAIL, DINING & ENTERTAINMENT



Night view of the plaza

CONCERT ARENA

— GLOBAL INNOVATION HUB



A Global Innovation Hub within BACL's Business Park, built to unify and elevate India's innovation ecosystem to a global scale.

The 'i' stands for

Innovation

Incubation

Intelligence

India

International



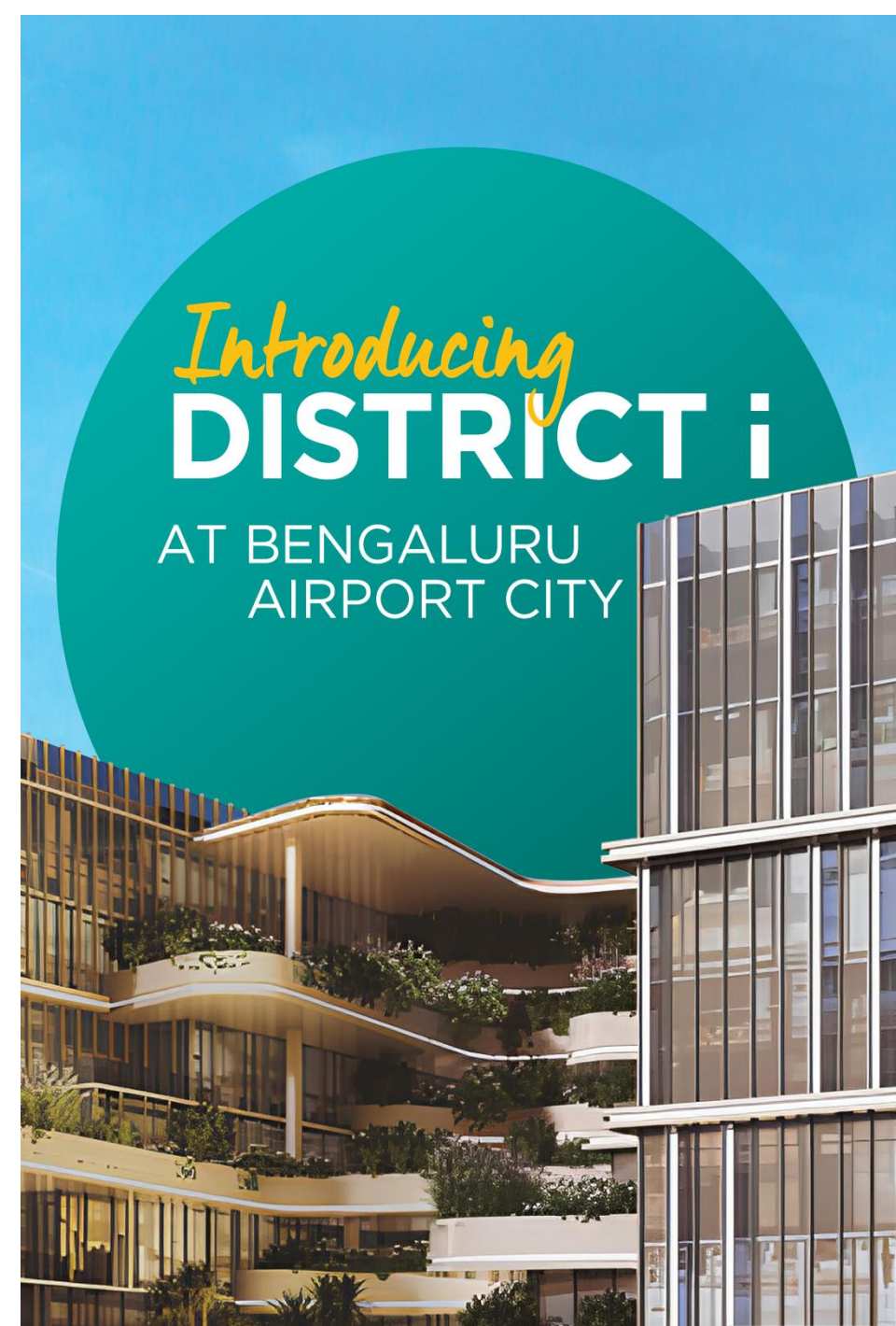
Accelerates deep-tech entrepreneurship and the commercialization of academic research.



Convenes GCCs, accelerators, corporate labs, startups, VCs and academia.



Fosters an interconnected, collaborative ecosystem across institutions.



An Integrated Urban Ecosystem

A multi-modal, world-class destination integrating business, transit, hospitality, and entertainment



Held against the world's benchmark ecosystem

INGREDIENT	SILICON VALLEY	BENGALURU AIRPORT CITY
Knowledge core	Stanford	IISc · IIM-B · District i
Anchor industry	Big Tech	Aerospace · MRO · GCCs
Risk capital	Sand Hill Road	Emerging + District i
Global Connectivity	~1 hour to SFO	Airport at the door
Cost Arbitrage	Highest-cost tech labor market globally	Significant cost advantage on comparable talent
Masterplanned	Emerged	Yes, from day one

Bengaluru Airport City is the only one assembling all 6 ingredients, deliberately at a single address

PUSHING OUR BOUNDARIES

Our initiatives carry the same depth as academic work



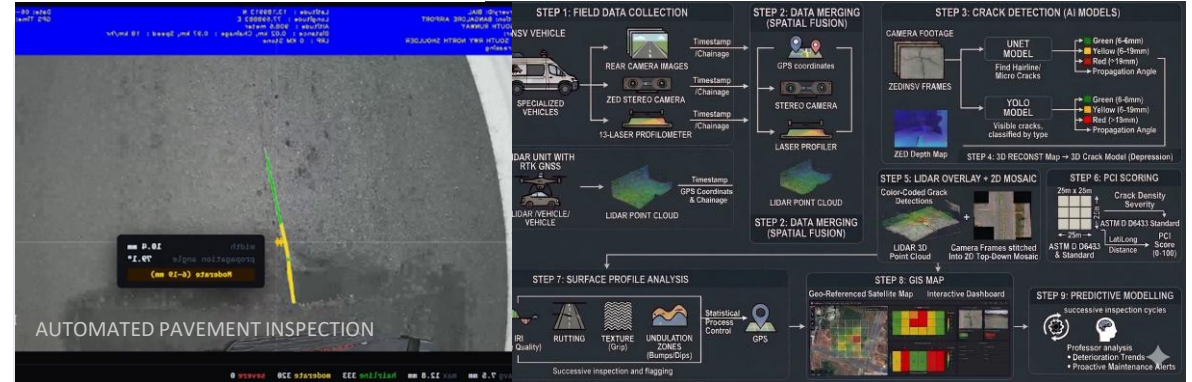
GEDDES Autonomous PIDS

- ✓ Radar Threat Fusion: Fixed radar locks target & cues mobile platforms.
- ✓ EO/IR Payload: Daylight & thermal camera tracking for first response.
- ✓ Command Integration: Instant automated sync to CISF response teams.

Security Rover

Commute Shuttle

Rail-Mounted



Runway Distress Assessment

- ✓ Laser Profiling: Continuous surface, friction, & light level mapping.
- ✓ ASTM D530 Compliant: Real-time PCI index scoring & micro-crack detection.
- ✓ AI Pipeline: UNET & YOLO neural models for 3D pavement analytics.

High-Speed NSV

3D LiDAR Cloud

GIS Dashboard

We actively collaborate

FROM TESTBED TO MARKET

What is proven here does not just stay here.



PRECEDENT

DigiYatra

Conceived and first deployed at BLR Airport.
Now a national mandate across Indian airports.

- ❑ Biometric single-token travel for a contactless, paperless journey.
Your face is your ID. Your phone is your wallet.
- ❑ It did not begin as policy. It began as something that worked at one airport and was good enough to become the standard for all of them.

FOUR ROUTES OUT

- 1 From Bengaluru Pilot to National Blueprint**
Pioneered Bengaluru's biometric pilot into India's 38-airport national digital identity framework.
- 2 Catalyzing Cross-Ecosystem Integration**
Expanded identity integration beyond terminals into major airlines and travel booking platforms.
- 3 Benchmarking Global Smart-Travel Standards**
Set operational benchmarks advancing Indian aviation toward global ICAO and IATA standards.
- 4 Setting the Industry Standard for Velocity & Capacity**
Slashed processing times to 5 seconds, scaling terminal capacity without physical expansion.

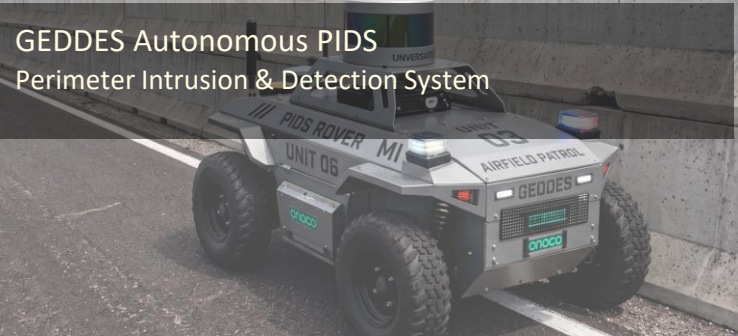
Our technological frontiers. Current, not roadmap.

Computer vision, biometrics and generative AI in production across the airfield, the terminals and the back office.

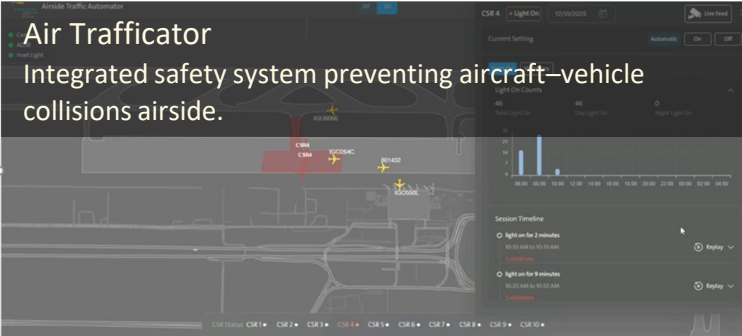
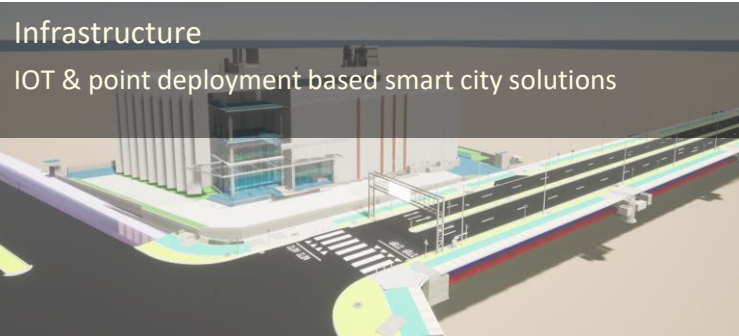
IN THE OPERATIONS



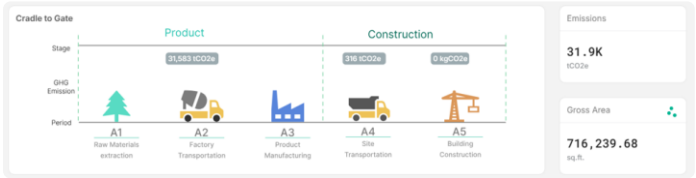
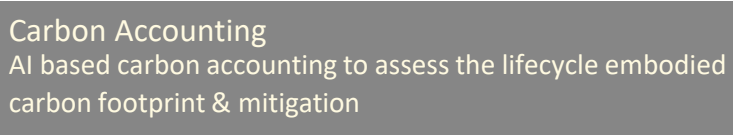
IN THE PURSUIT



IN THE AIRPORT CITY

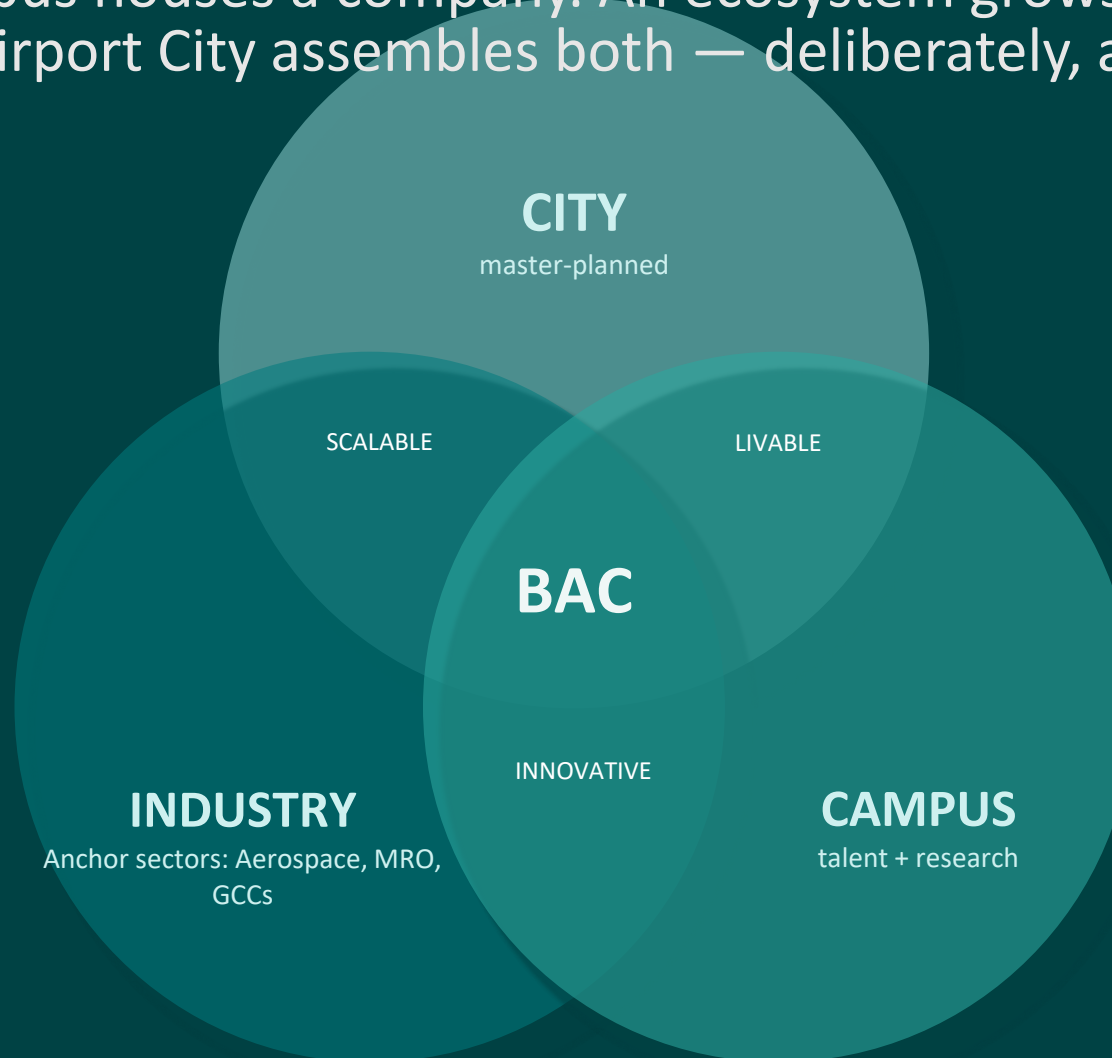


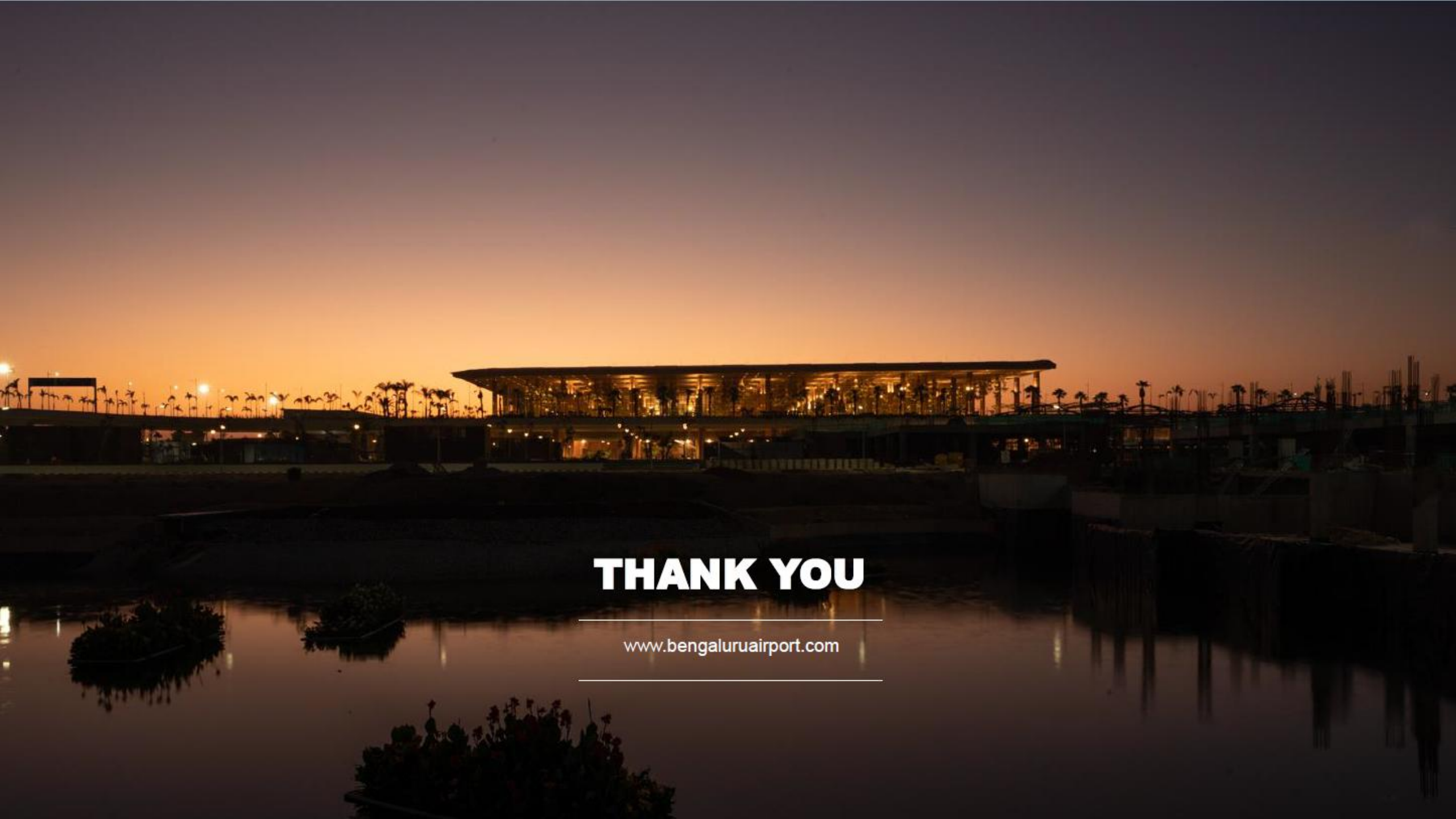
We testbed.
We adopt.
We help you to scale.



FROM CAMPUS TO ECOSYSTEM

A campus houses a company. An ecosystem grows an industry.
Bengaluru Airport City assembles both — deliberately, at a single address.





THANK YOU

www.bengaluruairport.com
