dun & bradstreet | Quest2Travel by make my trip

SIGNALS OF CHANGE

INSIDE INDIA'S GCC EVOLUTION

2026

HYDERABAD EDITION

dun & bradstreet

GCC SUMMIT 2026

Presented by

Table of Contents

Govind Joshi
Chief Operating Officer - India
Dun & Bradstreet India

The global business landscape is being fundamentally reshaped by rapid technological change, evolving enterprise priorities, and the need for resilience in an increasingly complex environment. In this context, Global Capability Centers (GCCs) have emerged as critical instruments in how organizations design, execute, and scale value creation across geographies.

What was once conceived as a model for operational efficiency has evolved into something far more consequential. Today, GCCs sit at the intersection of enterprise strategy, technology transformation, and talent innovation. They are no longer defined by the functions they perform. They are defined by role they play in shaping outcomes, enabling enterprise-wide capabilities, strengthening decision intelligence and supporting the development of new growth avenues.

However, this transformation is neither linear nor uniform. Enterprises are re-evaluating the very logic that underpins their global operating models. The questions confronting leadership teams today are more strategic than ever before:

- What distinguishes a center that merely delivers from one that creates sustainable enterprise value?
- How should organizations balance scale with specialization, execution with ownership, and capability with control?
- And critically, how can global organizations harness distributed talent ecosystems to drive innovation without fragmenting accountability?

It is against this backdrop that this report examines how the GCC model is being redefined and what this means for enterprise strategy. Drawing on inputs from leaders across the ecosystem and structured analysis, the report offers a clear view of how GCCs are being repositioned in response to changing business realities.

At its core, this report is designed to enable decision-makers across global headquarters and GCC leadership to navigate this transition with greater clarity. It aims to move beyond conventional narratives and surface the underlying signals that indicate where the GCC model is headed, and what will distinguish those that lead in the next phase from those that follow.

Shri D. Sridhar Babu
Hon'ble Minister for Information Technology,
Electronics, Communications, and Industries, Legislative Affairs,
Government of Telangana

The global economic landscape is currently navigating a period of profound structural realignment, marked by the evolution of Global Capability Centres (GCCs) into the primary nerve centres of enterprise innovation. No longer relegated to the periphery of operations, today's GCCs are the sites where intellectual property is forged and global strategies are executed. As organizations seek to build resilience in an increasingly complex digital age, they require more than just a destination. They require an ecosystem capable of sustaining high-order cognitive work. It is within this context of industrial metamorphosis that I am pleased to introduce this comprehensive report by Dun & Bradstreet India.

Hyderabad's ascendancy as a premier global hub is the result of a deliberate, multi-sectoral synthesis that distinguishes it from other technology centres. Our city has cultivated a rare "convergent ecosystem" where the boundaries between Information Technology, Life Sciences, Semiconductor, Hospitality, Aerospace, and Financial Services are increasingly porous. This domain depth allows for a unique cross-pollination of expertise, creating an environment where a digital platform developer can work in tandem with world-class pharmaceutical researchers or defence engineers. This intersection of industries is where true, future-ready innovation happens, providing global firms with a level of sophisticated talent that is difficult to replicate elsewhere.

Recognizing that talent is a volatile asset requiring a stable and world-class habitat, the Government of Telangana has moved from the role of a facilitator to an architect of the future. We are proactively engineering a landscape that anticipates the needs of the next century. Through the development of the Bharat Future City and our dedicated AI City, we are designing a net-zero urban core that integrates cutting-edge technology with high-quality living standards. Furthermore, initiatives like the Young India Skills University and the AIKAM Innovation Hub represent our commitment to democratizing high-end technical education, ensuring that our talent pipeline remains hyper-relevant to the shifting requirements of the global C-suite.

Under our "Telangana Rising" vision, we are moving far beyond simply providing office space. We are building the ultimate launchpad for the world's most ambitious organizations. I invite global leaders, investors, and strategists to explore the insights within this report, leverage our diverse ecosystem, and join us in shaping the next chapter of global business right here in Telangana.

Hyderabad emerges as a leading hub for GCCs

Hyderabad currently hosts **455 GCCs,** employing approximately **300,000 professionals**

In the past year, Hyderabad **surpassed Bangalore** by adding the highest number of GCCs **(75 new centers)**

The ecosystem is generating close to **100,000 new high-value jobs**

Key GCC verticals in Hyderabad include **BFSI, Healthcare, Life Sciences, Hospitality, BeautyTech, Retail, Media, and Engineering**

The city is projected to add **~100 new GCCs this year,** positioning it as a national leader

This growth is driving significant demand for **Grade A commercial real estate** in Hyderabad

Source: Government of Telangana

A Special Thanks

To these business leaders for their invaluable insights.

Mr. Pawan Sachdeva

Managing Director – Digital and Health Services
Carelon Global Solutions India

Mr. Sushant Bhushan

Global Leader – Data & Analytics and India GCC Leaders
Circle K

Mr. Cecil Manohar Daniel

Managing Director
ChampionX Global Tech Centre

Mr. Lalit Kumar

CEO
ArcelorMittal Global Business & Technologies

Mr. Vijay Morampudi

AI CoE Leader within MARSH GCC
Marsh

Mr. Dipu Gopinath

Director & Country Head
Merative India GCC

Mr. Paras Parikh

Country Head – India
ACA Group

Mr. Sandesh Pawar

Director
Grupo Antolin Design & Business Services

Dr. Rajesh Puneyani

VP & GCC Site Leader
Kenvue

Mr. Srinivas Sampath

Vice President R&D and Site Leader
Upland Software India Pvt. Ltd.

Note: The insights presented are those of the individual leaders and should not be construed as representing the views or policies of their respective organizations.

dun & bradstreet

Dun & Bradstreet Research & Advisory

Empowering organizations with actionable insights across the business lifecycle, from market understanding and concept validation to growth planning. We combine rigorous research & deep industry expertise with advanced analytics to transform complex data into clear decisions, enabling businesses to unlock growth, mitigate risk, and stay ahead in dynamic markets.

Solutions

- Industry Intelligence
- Growth & Strategy Advisory
- Deal Origination and M&A Advisory
- Market and Consumer Intelligence

Contact us at - +91 7969019528 | india@dnb.com 8657943769 www.dnb.co.in
@DunandBradstreetIndia @DNB_India @Dun&BradstreetIndia

Shri Alok Kumar, IAS
Additional Chief Secretary to GoUP,
Infrastructure & Industrial Development & NRI Department
Government of Uttar Pradesh

Global Capability Centres have undergone a remarkable transformation over the past decade. What began as cost-driven offshore operations have evolved into the strategic nerve centres of global enterprises — driving innovation, building proprietary technology, and delivering AI-led transformation for parent organisations worldwide. India sits at the heart of this shift, and the question for policymakers is no longer how to attract GCCs, but how to unlock the full depth of their potential.

Uttar Pradesh has answered that question with clarity and conviction.
With a STEM graduate base exceeding 2 Lakh Plus annually and a geography that places it at the crossroads of northern India's economic activity, UP is uniquely positioned for this next wave of GCC growth. But positioning alone does not build an ecosystem — that requires policy, institutional capacity, and the willingness to engage.

The Government of Uttar Pradesh notified the UP Global Capability Centre Policy, 2024 — a purpose-built framework addressing the full spectrum of GCC investment. The policy covers both capital and operational expenditure: land subsidy differentiated by region, 100% stamp duty exemption, capital subsidy, OPEX support of up to **INR 80 crore per annum** for larger centres, payroll subsidy of up to 50% in the first year, and dedicated support for talent development, R&D, and intellectual property creation. Critically, these benefits stack with Central Government schemes — maximising the total policy benefit for investors.

Beyond incentives, we have invested in institutional infrastructure to convert intent into outcomes. Invest UP, as the nodal agency, provides every GCC investor a single point of contact from the first conversation through to commercial operations. Our dedicated GCC Sector Desk manages backward and forward linkages across talent, real estate, and government facilitation. The Kaushal Connect Cell shapes university curricula to meet tomorrow's GCC skill requirements. Nivesh Mitra 3.0 ensures every approval is time-bound, transparent, and accountable.

Uttar Pradesh offers a full-spectrum value proposition — from Noida's established GCC belt to Lucknow's compelling cost and talent arbitrage, underpinned by IIT Kanpur, IIT (BHU) Varanasi, IIIT Lucknow, and over 700 AKTU-affiliated institutions. Notably, a significant share of the professionals powering India's GCC hubs in **Bengaluru, Hyderabad, and Pune** today are from Uttar Pradesh. Our task — and our opportunity — is to bring that talent home.

The DNB GCC Conclave represents exactly the kind of platform that accelerates this agenda. I look forward to the conversations, commitments, and partnerships that will emerge — and to welcoming more of the world's leading enterprises to Uttar Pradesh.

Mr. Bhavin Modi
Chief Commercial Officer
Quest2Travel & Happay by MakeMyTrip

The Travel & Expense Opportunity Most GCCs Are Yet to Unlock

It is the 4th of the month. A finance team in Hyderabad is trying to close the books. They are stuck on a single line a hotel stay in Coimbatore, booked by an engineer who flew down to meet a vendor. The hotel was not on the corporate tool, so the booking went through a personal card. The invoice has GST on it, but the GSTIN field is blank. The input credit is gone. The reimbursement is pending.

This is not a one-off. In most GCCs operating in India today, some version of this story is running through the stack right now. The names and cities change. The problem does not.

The GCC has changed. The infrastructure has not.

What started as a cost arbitrage play talent at scale, time zone coverage, back-office execution has become something else entirely. India is no longer where the work gets carried out. It is where strategy gets shaped, where products get owned, where global decisions get made. More than 1,800 GCCs now operate out of India. Over half share accountability for global decisions. The sector generates $64.6 billion in annual revenue and is projected to cross $100 billion by 2030.

The infrastructure that supports this workforce has not kept pace. And nowhere is that gap more visible than in travel and expense.

> India is no longer where the work gets carried out. It is where strategy gets shaped.
> The infrastructure that supports this workforce needs to reflect that.

A gap that is hiding in plain sight.

Most GCCs are running global T&E platforms, and they are good platforms. They govern global policy beautifully and give headquarters the consolidated view it needs. They were also built for a different market.

They connect to GDS hotel inventory, which is excellent if your employee is checking into a Marriott in London and invisible to the lakh-plus hotels across Nashik, Rajkot, Coimbatore and every tier-2 and tier-3 city where India's enterprise workforce actually travels. They were not designed for GSTN-compliant invoicing at every booking touchpoint, nor built to handle Indian railway ticketing with the rigour that corporate travel demands.

So employees do what reasonable people do. They book outside the tool. They pay on personal cards and submit a claim much later. And every part of the downstream picks up the cost of that workaround.

The numbers behind the problem

68% of corporate hotel bookings in tier-2 and tier-3 cities happen outside the corporate booking tool MMT / Happay platform data

2 to 4% of total travel spend lost in unclaimed GST input tax credit annually Happay platform data

15 to 21 days average reimbursement cycle when T&E is processed manually GBTA

INR 8 to 10 Cr recoverable on every INR 100 Cr of travel spend through end-to-end automation Happay / Quest2Travel analysis

For a CFO, this manifests as a reporting problem travel spend that cannot be reconciled, invoices that do not hold up to audit. For a CIO, it is a data integrity problem: fragmented booking channels mean no single source of truth, manual workarounds multiply, and the ERP integration that headquarters expects simply does not hold. For the employees living it, it is a monthly friction they have quietly accepted as normal.

The problem is not discipline or intent. It is that the tools were not built for this market.

What good looks like and who is already there.

The GCCs that have solved this have done so by treating it as a structural problem rather than a configuration problem. They have not tried to bolt India compliance onto a global tool. They have layered India-native infrastructure alongside it — handling the supply, the compliance and the employee experience that the global platform was never designed to deliver.

The result is not a messier stack. It is a cleaner one. Global tools govern global policy. India-native infrastructure governs India reality. Booking data and expense data finally speak to each other. GST invoices are generated at source, not chased at month end. Reimbursements close in days. And the finance close that used to drag stops being held hostage by missing invoices.

The GCCs that figured this out earliest are the ones whose global reporting actually got better — because the India data finally started flowing cleanly into the systems that need it.

This is not a story about replacing global platforms. It is a story about completing them.

The India GCC story is one of the most consequential enterprise transformations of our generation. It deserves infrastructure that was built for it.

Executive Summary

- India's GCCs have crossed the cost-arbitrage threshold — efficiency is now the baseline, not the differentiator. The strategic question has shifted to **which centres become enduring nodes of enterprise value versus advanced delivery units.**

- **Capability-building has overtaken capacity expansion as the dominant GCC strategy.** Enterprises are anchoring innovation-led mandates within select centres through Centres of Excellence, and some GCCs are being designed this way from inception — not evolving into it over time.

- **Co-ownership of outcomes is now mainstream, but decision authority remains selectively distributed.** GCCs carry growing accountability for results while control over budgets, technology direction, and capital allocation stays largely with headquarters — a gap that limits their ability to fully own outcomes.

- **Revenue enablement is the next value frontier.** A growing share of GCCs are contributing to top-line outcomes, moving beyond internal optimization. IP-led value — proprietary platforms, models, and accelerators — remains the highest-return opportunity and the most underdeveloped.

- **AI is the next technology GCCs must industrialize,** but a significant pilot-to-production gap persists. With 41% of AI initiatives still in pilot phase, the challenge is no longer proving AI works — it is building the governance, controls, and repeatability needed to deploy it at enterprise scale.

- **Winning the AI era will require fusing technical depth with domain expertise.** Hiring more AI specialists alone will not be sufficient — GCCs that integrate AI capability with deep business context will own outcomes; those that treat domain knowledge as secondary risk limiting AI impact to tool-level advantage.

Bhavin Modi
Chief Commercial Officer
Quest2Travel & Happay
by MakeMyTrip

How is Quest2Travel reimagining corporate and business travel as organization push for greater efficiency, compliance, and employee experience?

Quest2Travel, the corporate arm of MakeMyTrip, is designed to digitally transform corporate travel management from a fragmented, manual process into a fully integrated, technology-first ecosystem for large enterprises including BSE 500 companies. We have synchronised employee data seamlessly from HRMS platforms into financial and ERP systems, minimising manual intervention at every step.

Quest2travel has the capability to integrate with multiple systems at various touchpoints with the existing systems for better user experience. System offers more than 20k+ GST and service assured Enterprise segment hotels Pan India for Employees to have access to and delivering Tax Invoice for credit input. The platform automates GST tracking and reconciliation across airline and hotel invoices, a critical capability in a market where a majority a corporate travel spend is still unmanaged and GST input credits are routinely lost to non-compliant bookings. A single platform consolidates flights, hotels, and ground transport with 24×7 in-house support, tailored SOPs for CXO and emergency bookings. By automating, centralizing and consolidating all aspects of employee travel, including policy compliance, and approvals to refunds and audits, Quest2Travel enhances ease of use and gives organizations a travel programme that is transparent, well-controlled, seamless in experience and efficient across every booking.

With GCCs and global enterprises expanding across multiple cities, how do you support scalable, policy driven travel ecosystems?

Most GCCs are running global T&E platforms, and they are good platforms. They govern global policy beautifully and give HQ the consolidated view it needs. They were also built for a different market. Scalability today for GCCs and global enterprises depends on balancing global requirements with local relevance. In a diverse market like India, where travel frequently extends beyond metro cities, Quest2Travel provides access to accommodation across metro and tier 2,3,4 & 5 cities with technology enabled ground travel support, covering Indian railways, cabs and buses, ensuring that every booking, regardless of location, stays within the platform and within policy. Built to Indian compliance standards, our GST module delivers audit-ready and compliant invoices at every booking touchpoint backed by an MIS dashboard that gives complete visibility across the total travel programme. Automated approval workflow compliant to the travel policy, built-in policy checks and seamless data flow between HRMS and ERP systems enables organisations to expand seamlessly with better governance as business grow across multiple cities.

What role does technology and data play in optimizing travel spend and decision making for large enterprises?

Technology and data are the foundation of cost control and smarter decisions at scale, enabling large enterprises to make better informed travel decisions. Quest2Travel's advanced MIS dashboards provide real-time spend visibility, segmented by department, region, project, and location, by department, region or projects, making it more convenient to identify savings opportunities and lock any revenue leakage. Our Budget and Project modules are classic

examples of how technology and data play an integral part in driving cost optimisation. With a tech-first approach, employees only see flights and hotels within their approved budget, removing the possibility of overspending and reducing the need for manual oversight.

Auto Ticket Issuance streamlines the experience with faster bookings while also maintaining 100% policy adherence, removing the trade-off between speed and compliance.

Together, these capabilities translate data into decisions, enabling teams to plan with confidence and act without delay.

How are sustainability and responsible travel influencing corporate travel strategies today?

Companies are aligning travel policies with broader ESG goals, focusing on reducing environmental impact. This includes encouraging eco-friendly travel options and tracking their carbon footprint. As ESG commitments and audit standards evolve, organizations need emissions data that is accurate, auditable, and integrated, not a manual estimate assembled at year-end. Quest2Travel's platform generates detailed CO2 Emission Reports, which can be directly integrated with existing enterprise systems. This feature enables organizations to track their carbon footprint effectively, contributing to sustainability goals and equips leadership to design policies that balance cost, compliance, and environmental impact. Corporates have already adopted this capability as a core part of their travel governance framework.

What distinguishes Quest2Travel's approach from traditional corporate travel management providers?

Built on a strong technology-first approach, Quest2Travel is one of the industry's most advanced self-booking tools offering to more than 35 modules used at enterprises. Trusted by 500+ large enterprises and managing travel for over 2.5 million employees, the platform drives digital transformation through seamless HRMS and ERP integrations, enabling real-time data flow and complete visibility. Its highly flexible and customisable architecture is designed to handle complex enterprise needs, with automation powering policy compliance, approvals, billing, GST reconciliation, and reporting. With strong backend capabilities, advanced MIS insights, and 24X7 in-house customer support, organisations benefit from faster processes, better control, and enhanced compliance—while consistently achieving 18%–20% savings in overall travel expenditure.

Looking ahead, how do you see the future of corporate travel evolving over the next few years?

The future of corporate travel will be automated, AI-driven and fully integrated single platform. Organisations will increasingly rely on intelligent platforms that help provide an automated travel workflow with minimal manual effort and superior UI/UX experience.

Overall, corporate travel will become more technology efficient, data-driven and self-optimising, ensuring better outcomes in cost, compliance and experience. ■

नवनिर्माण के ९ वर्ष

UTTAR PRADESH

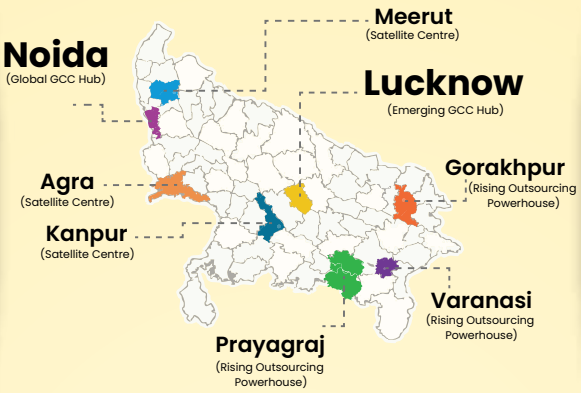
India's Premier Destination for Global Capability Centres

22+ Expressways
(9 Operational + 13 Upcoming)

21 Airports
(16 Domestic, 5 International)

1st Inland Waterways
on River Ganges

2 Lakh+
STEM Graduates



2nd
Largest Economy in India

Catchment of
Eastern (57%) & Western (8.5%)
Dedicated Freight Corridor & Defence Industrial Corridor

OPEX Subsidy
Up to **20%**

GCC Setup Cost
Reduce by up to **30–40%**

Front-end Land Subsidy
Up to **50%**

Capital Subsidy
25% of Eligible Capital Investment

Interest Subsidy
5% on Term Loan or Actual Interest Paid

CoE & Startup Ideation Support
Up to **50%**

UP GCC Policy 2024

Single-window approvals | **Dedicated RM** | **Fast-track setup support** | **Custom incentives for large GCCs**

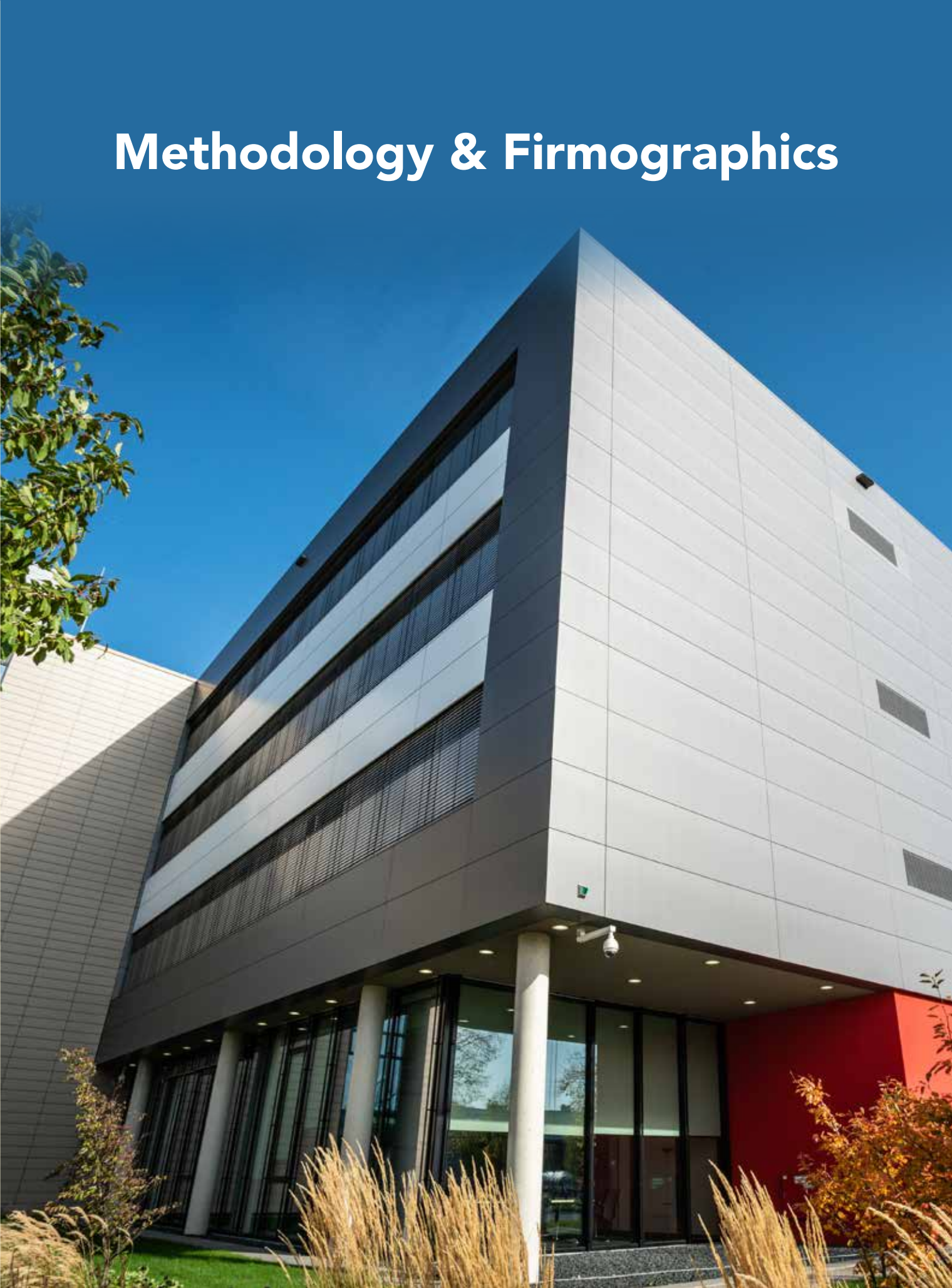
Set up your GCC in UTTAR PRADESH TODAY

Scan to know about Invest UP

Scan to know about GCC Policy

www.invest.up.gov.in | info@investup.org.in

Methodology & Firmographics



Research Methodology

This research study is anchored in primary data collected from the India GCC ecosystem, complemented by senior leadership perspectives.

Primary Survey

The research study is based on a structured survey of **120+ Global Capability Centers (GCCs)** across **10 industry sectors** and **9 major GCC cities in India.** Responses are gathered from senior GCC leaders with direct responsibility for centre strategy, operations, and enterprise engagement.

The survey captures insights on **GCCs' strategic role, decision-making authority, enterprise value delivered, IP-led impact, depth of technology adoption across priority areas, and the talent development initiatives GCCs are prioritizing.**

Leadership Interviews

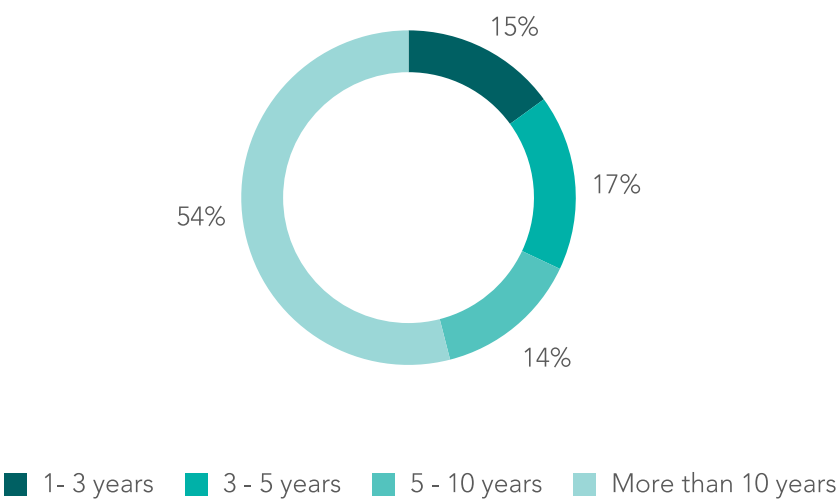
Survey findings have been **supplemented with 10 in depth interviews with GCC leaders,** including centre heads and senior executives. These discussions provide context to the quantitative results, validate emerging themes, and explain the drivers behind observed shifts in GCC role and positioning.

Analysis Approach

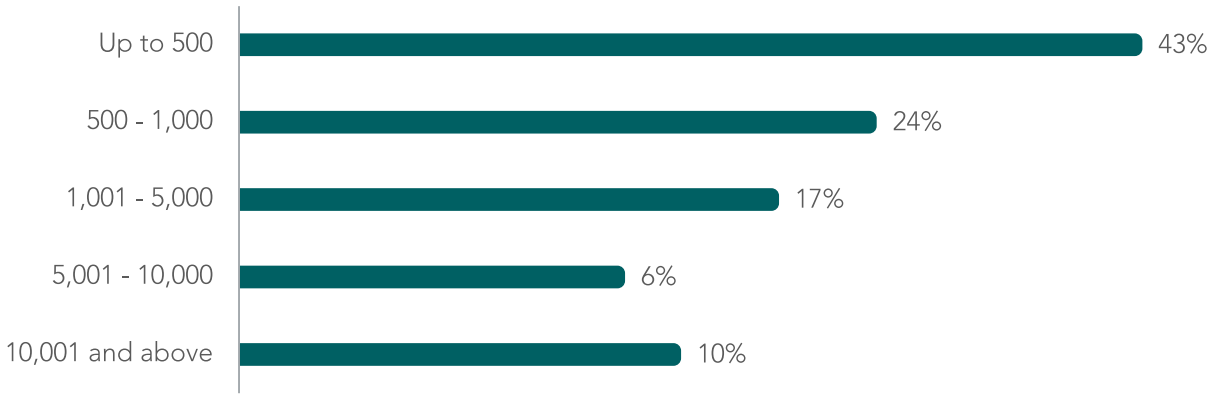
Survey data is analysed at an aggregate, sectoral, and city level. Insights from leadership interviews are triangulated with survey findings to strengthen interpretation and surface enterprise level signals beyond standalone metrics.

Firmographics

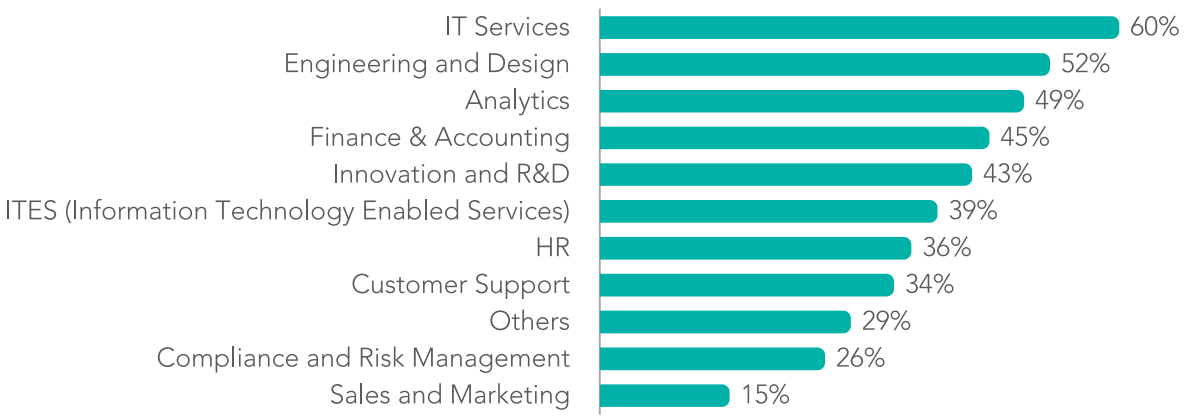
GCC Tenure



India GCC headcount (including contractual employees)



Primary function of the GCC



Revenue enabled for parent organization in FY25

Dr. Varun Nagaraj
Dean
S. P. Jain Institute of
Management & Research

Bharatiya Vidya Bhavan's
SPJIMR
EXECUTIVE EDUCATION

As GCCs expand their strategic responsibilities, how do management institutions like SPJIMR contribute to building future-ready leadership talent for these centers?

Building future-ready leadership requires a shift from 'resource management' to 'value orchestration'. GCCs today need more than managers who can deliver on KPIs; they require leaders who can navigate the cultural and strategic complexities of a global headquarters environment.

At SPJIMR, this is reflected in our evolving curriculum. We have introduced courses focused on Global Stakeholder Management and Cross-Cultural Leadership to prepare participants to work with and manage globally distributed teams. There is also a strong emphasis on intrapreneurship — preparing talent to take ownership of global products and initiatives, moving from executing tasks to owning outcomes.

In addition, our Executive Education programmes are tailored for mid-to-senior-level GCC professionals, enabling them to transition from technical specialists to strategic business partners.

What skills and mindsets do you believe are most critical for professionals working in innovation-led and AI-driven GCC environments?

In AI-driven GCC environments, professional do not necessarily need to be coders, but they must understand how to leverage large language models (LLMs) and predictive analytics to drive business decisions. A key capability is complex problem-solving, the ability to deconstruct large, multifaceted challenges, build solutions, and integrate them effectively.

Equally important is the mindset. Today's work environment operates increasingly in grey zones, where global mandates intersect with local execution. This requires a high tolerance for ambiguity and a comfort with uncertainty, enabling professionals to act decisively even when outcomes are not fully defined.

How can academia and GCCs collaborate more closely to bridge the gap between management education and real-world global business challenges?

Closer collaboration between academia and GCCs is essential to ensure that management education remains relevant and practice-oriented. One approach is co-created curricula, where GCC leaders serve as Professors of Practice, ensuring that teaching reflects current, real-world challenges. This can include the development of micro-cases based on everyday workplace problems, making learning more immediate and applicable.

Additionally, short-term, flexible learning formats can play a key role. Open programmes on emerging technologies such as generative AI and quantum computing, allow GCC professionals to upskill without stepping away from the workforce. ■

Alok Kumar
Additional Chief Secretary to GoUP Infrastructure & Industrial Development & NRI Department
Invest UP

How is Invest UP positioning Uttar Pradesh for next generation GCCs beyond IT/ ITeS?

Uttar Pradesh has shifted its GCC strategy beyond IT–ITeS toward high-value functions such as R&D, engineering, analytics, finance, HR, and product development. The Uttar Pradesh Global Capability Centre Policy, 2024 (effective May 2025) is India's first dedicated state-level GCC framework to attract and scale advanced operations.

The policy categorises GCCs into Level 1 and Advanced segments based on investment and employment thresholds. Advanced GCCs receive enhanced incentives, including capital subsidies up to INR 25 crore annually, OPEX subsidies up to INR 80 crore annually, and payroll support over four years.

Invest UP serves as the nodal agency, providing single-window facilitation from approvals to operationalisation. The GCC Sector Desk supports investors through linkages across talent, infrastructure, real estate, and expansion planning.

To originate investments, Invest UP is expanding its presence in Bengaluru, Hyderabad, and Mumbai, enabling direct engagement with global enterprises. This has led to traction, with proposals exceeding INR 5,000 crore in investment intent, positioning Uttar Pradesh as an emerging GCC destination.

What differentiates UP's GCC ecosystem in policy, infrastructure, and talent?

UP's GCC ecosystem stands out across three pillars—policy depth, infrastructure readiness, and talent scale.

On policy, the UP GCC Policy 2024 offers a comprehensive framework covering R&D, engineering, and corporate functions. Benefits include 30–50% land subsidy, 100% stamp duty exemption, OPEX subsidies up to INR 80 crore annually, payroll support (up to 50% in Year 1 outside NCR), EPF reimbursement, and patent-linked incentives. These can be combined with central schemes, improving returns.

Infrastructure development focuses on decentralisation. While Noida remains a mature hub, new Grade A capacity is emerging through UPEIDA-led parks in Lucknow and a Private Business Park Policy based on a DBFOT model with long-term concessions, enabling expansion into Tier 2 cities.

Talent is a key strength. Uttar Pradesh produces over 2 Lakh Plus STEM graduates annually, and a large share of India's GCC workforce originates from the state. The Kaushal Connect Cell aligns hiring needs with academic curricula, creating a ready local talent pool.

How will GCCs contribute to UP's economic and employment growth?

Over the next five years, GCCs are expected to evolve into anchor institutions in Uttar Pradesh's growth.

In the near term, Invest UP's pipeline—over INR 5,000 crore in investment intent—will generate high-quality jobs. More importantly, GCCs will drive ecosystem development, creating demand across real estate, digital infrastructure, consulting, skilling, and higher education, turning cities into integrated economic hubs.

Employment generation is being localised. Recruitment subsidies for UP-domicile freshers and initiatives like Kaushal Connect ensure jobs are created within the state's talent base.

Strategically, engagement with global enterprises will help GCCs transition from execution centres to innovation, analytics, and product ownership hubs, enhancing productivity and export-linked growth. ■

Neehar Pathare
MD, CEO & CIO
63SATS Cybertech

As GCCs increasingly own global systems and platforms, how do you view their role evolving from execution centers to enterprise-wide digital control towers—and how is 63SATS preparing for that shift?

We partner with Global Capability Centers (GCCs) across the data and software lifecycle, providing support from design to deployment. Our governance specialists ensure security is embedded at every stage, not treated as an afterthought.

As GCCs evolve into critical hubs, strong internal controls are essential to avoid concentration risks and single points of failure. We work with organizations to strengthen these frameworks, while our technology helps mitigate insider threats.

We also enable a holistic cybersecurity approach by validating the entire ecosystem, including third-party partners, against best practices, ensuring resilience and end-to-end security integrity.

Additionally, our continuous monitoring, threat intelligence, and AI-driven analytics empower GCCs to proactively detect, respond, and adapt to cyber risks.

From a CIO's perspective, how should GCCs architect security into their platforms from day one, rather than layering it later as a compliance requirement?

In system development, we begin at the requirement definition stage by outlining security expectations alongside the business case—ensuring security is a core criterion from the outset. As design is finalized, we incorporate threat modeling to identify and address vulnerabilities.

During development, modules undergo testing through SAST and DAST techniques to ensure code and application-level security. We also enforce strict segregation of SATS data from system data, maintaining integrity and minimizing risk across the lifecycle.

Post-development, we conduct rigorous validation, including penetration testing and secure code reviews, before deployment. Continuous monitoring, patch management, and incident response mechanisms further ensure systems remain resilient against evolving threats.

What architectural or platform-level decisions should GCC leaders make today to ensure long-term cyber resilience as business complexity and autonomy increase?

It is essential to clearly segregate operational requirements from evolving security requirements, ensuring that both grow in tandem. A structured pipeline must be in place to consistently uphold the availability, integrity, and confidentiality of data as operations scale.

From a strategic standpoint, planning must account for scalability, elasticity, and future feature needs. For instance, when building AI platforms, robust security controls must be embedded into the development of LLMs from the outset. Given that GCCs manage significant volumes of global data, they must also address a wide range of regulatory compliance obligations, while carefully considering the ethical implications of data usage and profiling. ■

Srinivas L
Joint MD & Joint CEO
63SATS Cybertech

GCCs operate at massive scale with distributed teams and workloads. How do you help them translate cybersecurity strategy into consistent, day-to-day operational execution?

Cybersecurity strategy must ultimately serve and align with business objectives. To translate this into consistent day-to-day execution, we combine expert-led consulting with a robust portfolio of solutions and services. Our approach integrates advanced tools and OEM platforms to strengthen the overall security architecture, while also embedding governance and operational discipline into daily workflows. This ensures that cybersecurity is not just a strategic intent, but a continuously enforced practice across distributed teams and environments.

We further drive measurable outcomes through defined KPIs, regular audits, and continuous improvement frameworks that enhance accountability and long-term resilience.

Many GCCs still approach security reactively. How is 63SATS helping them move toward continuous assurance and real-time readiness across global operations?

A reactive approach is no longer viable in today's threat landscape, especially with advancements such as Claude Mythos, and other AI-driven attack models. At 63SATS, we enable organizations to shift toward a proactive and resilient posture through our next-generation SOC, which delivers real-time threat detection, analysis, and response across global operations.

Beyond technology, our teams focus on the continuous evolution of cybersecurity frameworks, helping GCCs anticipate risks, strengthen defences, and embed readiness into everyday operations. This ensures a move from reactive response to continuous assurance, aligned with the dynamic nature of modern cyber threats.

We also leverage predictive intelligence, automation, and cross-functional collaboration to ensure faster decision-making, reduced response times, and sustained cyber resilience at scale.

As GCCs increasingly become the first line of defense for global enterprises, what operational capabilities do they need to own internally versus relying on external partners?

As part of our engagement model, we enable GCCs to strike the right balance between in-house capabilities and external expertise. Core functions such as governance, risk ownership, and critical decision-making should remain internal to ensure accountability and alignment with business priorities.

At the same time, we provide managed services where our specialists operate as an extension of their teams, supporting day-to-day security operations and resilience. We also actively participate in due diligence processes and offer leadership roles such as vCISO and vDPO. While these experts are part of our organization, they operate with complete integrity and act in the best interests of the client, ensuring strong oversight, compliance, and operational excellence, enabling scalability, faster response times, proactive risk mitigation, and sustained alignment with evolving regulatory and cybersecurity landscapes. ■

Driving Efficiency, Compliance, and Strategic Value: Quest2Travel's Impact on Manufacturing Industry Travel Management

Manufacturing organizations operate in highly dynamic and distributed environments where employee movement across plants, corporate offices, warehouses, vendor locations, and customer sites is constant. Managing travel in such ecosystems often becomes operationally complex due to fragmented booking processes, decentralized approvals, multiple vendors, and limited visibility into travel spends. Large enterprises often depend heavily on offline execution teams and regional coordinators for bookings and approvals across different locations. Unnecessary delays, inconsistencies, lack of transparency into travel costs and employee movement along with post-travel approvals, policy leakages, result in efficiency across cross-functional departments, including HR, admin and finance teams amongst others.

Keeping this in mind, Quest2Travel has built a centralized end-to-end travel management, designed specifically for large enterprises with multi-location operations. For manufacturing organizations, this means measurable improvements in policy compliance, cost visibility, and cross-functional efficiency, bridging the gap between fragmented, offline processes and a single, technology-driven ecosystem.

The platform has automated the entire travel lifecycle, from travel requests and approvals to bookings, reporting, and expense integration through Happay. By bringing varied, offline processes across multiple markets under a single HRMS system, Quest2Travel has equipped large enterprises into a seamless and standardized compliant travel process across every location.

The implementation of a Self-Booking Tool (SBT) marks a major shift in how employees manage their travel. By empowering them to independently book flights, hotels, and ground transportation within company policy guidelines, Quest2Travel has significantly reduced dependency on offline processes and improved booking turnaround times. Employees have gained better visibility into available travel options, negotiated corporate fares, and compliant booking choices, resulting in a smoother and more transparent travel experience.

Policy governance has seen a significant uptick in the manufacturing companies through Quest2Travel's capability to embed travel policies directly into the platform. Automated rule-based workflows have enforced employee eligibility, travel entitlements, approval hierarchies, and budget controls at the point of booking. This has minimized policy deviations, strengthened overall compliance and reduced the administrative burden on finance and HR teams.

To drive cost optimization for the corporates, Quest2Travel has integrated negotiated corporate rates across flights, hotels, guest houses, and car rental vendors into a single unified platform. This has allowed organizations to standardize vendor usage, improve rate visibility, and make more informed booking decisions, while eliminating the inefficiencies across different ecosystems and inconsistent pricing structures.

Reporting and analytics represent another significant leap forward. Quest2Travel's real-time MIS dashboards provides leadership teams complete visibility into travel expenditure across plants, departments, and business units, budgets, booking patterns, and savings opportunities. The platform has been turning travel data into a genuine input for spend patterns, once invisible, became a lever for smarter financial planning with improved forecasting and strategic decision-making capabilities

The integration of travel systems with enterprise HRMS and ERP platforms has further enhanced operational efficiency. Real-time employee data synchronization has ensured accurate traveller profiles, faster approvals, smoother onboarding processes, and better coordination between business functions. This has helped manufacturing companies to create a fully connected travel and expense management ecosystem, aligned with their broader digital transformation initiatives.

As a result of these implementations, manufacturing organizations have experienced significant improvements in operational efficiency, policy compliance, employee experience, and cost control. Booking turnaround times reduced considerably, travel processes became more transparent, some organisations achieved 10%-12% savings on travel budgets and leadership teams gained access to actionable insights for better decision-making.

Today, Quest2Travel continues to be the travel infrastructure of choice for manufacturing enterprises, combining technology, automation, enterprise integrations, and deep travel expertise to help organizations take control of one of their most operationally complex functions.

Signals of Change: Research Findings

GCCs are no longer what they were built to be

It is now well-established that Global Capability Centres (GCCs in India) are no longer positioned primarily as cost-arbitrage or back-office support units. Over the past decade, their remit has steadily expanded from transactional processing and IT support to higher-value work spanning analytics, digital transformation, product engineering, and enterprise platforms. As enterprises scaled their India footprint, GCCs became deeply embedded in core operations, delivering efficiency, resilience, and execution excellence at scale.

However, what is changing now is not merely the breadth of work being done, but the strategic logic underpinning GCCs themselves. The traditional narrative of "moving up the value chain" assumes a linear progression—from cost, to efficiency, to value. The evidence emerging from this research points to a more structural shift. GCCs are no longer being shaped solely as execution engines that evolve incrementally; instead, many are being re-designed upfront around innovation, capability ownership, and enterprise relevance.

This distinction matters. Moving beyond cost arbitrage is no longer the differentiator—it is the baseline. The emerging question is how GCCs are redefining their role within the enterprise, and what separates those that remain advanced delivery centres from those that are becoming enduring strategic nodes. The signals of change explored in this report reflect this next phase of GCC repositioning.

Evolution of GCC responsibilities and operating scope

75%

GCC leaders confirm significant transformation in last 3 years

65%

report broader range of services delivered

60%

report expanded scale (headcount & budget)

"While cost efficiency continues to be the entry point for most GCCs, it is no longer the justification for their existence. Today's GCCs are being designed to harmonize, standardize, and bring control across highly fragmented global enterprises, with value defined in clear business terms—productivity gains, time saved, headcount efficiency, and direct impact on EBITDA."

MR. LALIT KUMAR
CEO at ArcelorMittal Global Business & Technologies

The Autonomy Gap Paradox

GCCs are co-owners, not just executors — but full autonomy remains elusive

As India GCCs take on more innovation led and enterprise critical mandates, their role within the enterprise has formally expanded. The evidence shows a broad shift toward shared outcome ownership, but also reveals that decision authority is being redistributed selectively—varying sharply by decision type rather than moving uniformly toward full autonomy.

The Autonomy Gap

61%

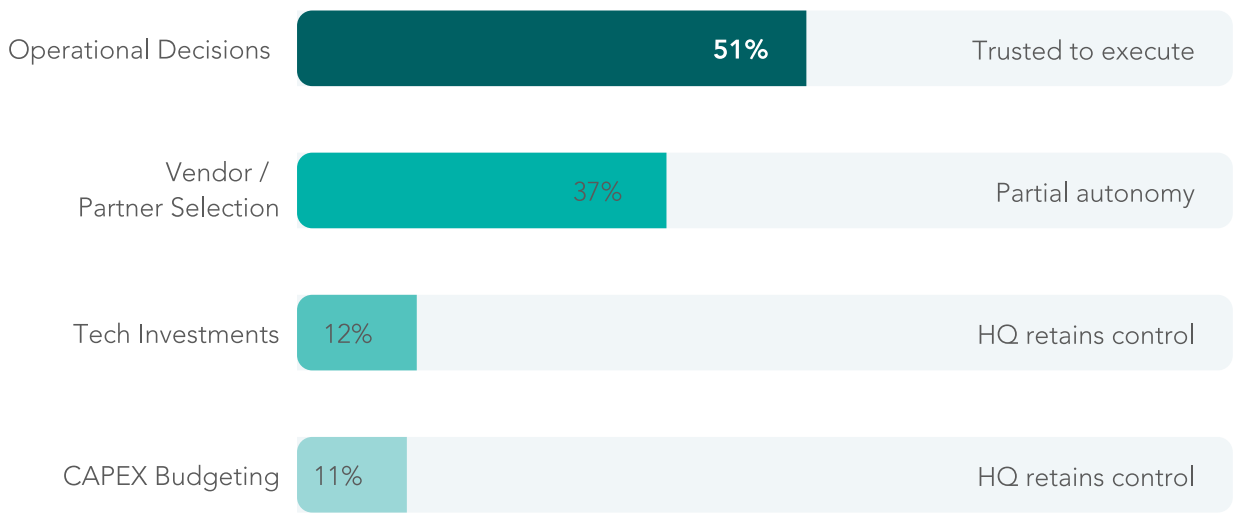
describe their GCC's role as **"Co-owner"** — shared responsibility with HQ

VS

15%

Report **end-to-end leadership**

% of GCCs with FULL Decision-making Authority



Source: Dun & Bradstreet

- **Co ownership is now embedded in GCC operating roles, not aspirational**
  A majority of GCCs already function as co owners of outcomes, reflecting a structural repositioning away from pure execution. This confirms that shared accountability with headquarters is now a mainstream operating reality for India GCCs.

- **Autonomy follows execution proximity, not strategic impact**
  Decision authority is highest where GCCs are closest to day to day delivery, particularly operational decisions. As decisions move upstream into budget ownership, technology direction, and capital allocation, authority shifts decisively toward shared control, signaling tighter enterprise oversight over high impact levers.

The 15% Playbook

While most GCCs are expanding their scope and ownership, only a small subset are consistently able to translate this into sustained decision authority and enterprise influence. These centers demonstrate a distinct set of characteristics that differentiate them from the broader ecosystem.

What emerges is not a single capability or initiative, but a consistent pattern across leadership centrality, technology ownership, revenue contribution, and IP creation. Together, these signals define how autonomy is built, sustained, and expanded within the enterprise.

How is autonomy earned?

Global Leadership	AI First Movers	Revenue Impact	IP Creation
Global role holders are autonomy accelerators — their visibility at HQ creates grassroots trust that translates into governance latitude.	Being first to industrialize AI pilots into enterprise platforms creates technical authority that HQ cannot ignore.	Revenue contribution is a key credential for trust expansion. GCCs that prove top-line impact leapfrog peers in decision rights.	IP leadership is the most under-exploited lever. GCCs with widely adopted IP hold the strongest case for strategic elevation.

Current patterns indicate that autonomous GCCs consistently outperform across key value dimensions

46% of autonomous GCCs are a key source of global leaders vs. **12%** overall

38% of autonomous GCCs have deployed AI enterprise-wide vs. **15%** overall

75% autonomous GCCs report clear/significant revenue enablement compared to **52%** overall

45% autonomous GCCs have created IPs that have enabled competitive advantage/new revenue opportunities vs. **9%** overall

Key Takeaways

- **Co-ownership marks a structural expansion of India GCC responsibility**
  India GCCs are no longer peripheral contributors—they are now embedded in shared outcome delivery. This elevates expectations materially: performance is increasingly judged on enterprise impact, not task efficiency.

- **Carrying responsibility without control exposes India GCCs to execution risk without strategic leverage**
  As accountability rises faster than authority, GCCs absorb delivery and outcome risk while remaining constrained on the decisions that shape long-term success. This imbalance limits their ability to proactively course-correct or fully own results.

- **The next phase of GCC evolution will be defined by how intentionally enterprises translate shared responsibility into true authority**
  The real shift ahead is not about doing more work—but about who gets to decide. India GCCs that are granted formal decision rights will move into enterprise-shaping roles; others will remain high-impact operators with capped influence.

"India is no longer supporting the business—we are owning global mandates. Teams here are directly accountable for outcomes across geographies, with end-to-end responsibility rather than task-based execution. That shift in ownership has fundamentally changed how the GCC is perceived and how it operates."

MR. SUSHANT BHUSHAN
Global Leader - Data, Insight & AI and India GCC Leader, Circle K

"Leadership credibility and autonomy are built through delivery, particularly in complex, matrixed global organizations where influencing without authority becomes critical."

DR. RAJESH PUNEYANI
VP & GCC Site Leader, Kenvue

Nirmala Datla
Chief Data Science &
Engineering Officer
Sasken Technologies

SASKEN

How is Sasken helping GCCs become innovation hubs?

Sasken leverages its 35+ years of deep engineering heritage and proven expertise across semiconductor, automotive, industrial IoT, and telecom domains to accelerate GCCs' transformation into innovation powerhouses.

Our comprehensive approach includes deploying specialized pods comprising solution architects, product strategists, design thinking experts, and platform engineers who integrate seamlessly with GCC teams. These experts establish Centers of Excellence in cutting-edge areas like AI/ML, GenAI, 5G/6G, edge computing, and embedded intelligence. By combining Sasken's robust IP portfolio, reusable frameworks, and accelerators with GCCs' enterprise knowledge, we enable rapid prototyping and product innovation.

Our innovative service model helps GCCs transition from cost-center operations to value creators, fostering patent generation, IP development, and breakthrough product innovations that directly impact their parent organizations' competitive advantage.

Which digital, AI, and embedded skills matter most for GCCs—and how does Sasken support them?

Today's GCCs are architecting complex systems that seamlessly blend embedded intelligence with cloud-native applications, requiring expertise across silicon-to-software stacks. They prioritize capabilities in AI-powered product engineering, software-defined vehicles, intelligent edge systems, and sustainable technology solutions. To deliver end-to-end products, GCCs need a mix of technical, product, and operational capabilities.

Sasken empowers this transformation through its comprehensive engineering services spanning chip design, embedded software, full-stack development, and system integration. We provide GCCs with ready-to-deploy talent pools skilled in emerging technologies, along with our proprietary methodologies that ensure first-time-right product development while maintaining enterprise-grade security and compliance.

How will India based GCCs' role in global R&D evolve?

India GCCs have transformed remarkably over 15 years, evolving from "back office support" centers to "front office R&D" powerhouses driving critical innovation.

Over the next 3-5 years, India GCCs will own the complete "concept to cash" lifecycle - encompassing ideation, product strategy, design, development, launch, and revenue generation. Leading GCCs already operate as "mini-CEOs" with integrated teams spanning product management, engineering, design, data analytics, and go-to-market—all based in India.

These evolved GCCs now matrix directly into global business units rather than global IT, with many owning P&Ls and effectively running entire business units from India, making decisions that impact global strategy.

This shift is reflected in transformed success metrics - from operational outputs to strategic outcomes like patents filed, revenue percentage from GCC-built products, NPS of internal platforms, and architect/system designer talent density. These metrics underscore GCCs' transition from cost centers to value creators.

This evolution positions India not just as an execution hub but as the nerve center for global innovation, with GCCs becoming the primary architects of next-generation products and business strategies that define their parent organizations' competitive edge in the global marketplace. ■

upwind

Amiram Shachar
CEO & Cofounder
Upwind

As cloud-native architectures become central to GCC operations, how is Upwind helping GCCs secure their cloud workloads without slowing innovation?

As cloud-native architectures become central to GCC operations, Upwind helps teams secure workloads by grounding every decision in real-time runtime data. GCC teams are building and operating high-velocity environments where services, APIs, and infrastructure are constantly changing. Upwind provides continuous visibility into what is actively running, which vulnerabilities are in use, and how applications communicate in real time. This allows teams to prioritize the risks that have real impact, streamline remediation, and stay aligned with development velocity. Security and engineering teams get a shared, accurate picture of risk, which means faster decisions, fewer false positives, and protection that keeps pace with the speed of modern cloud-native development. The result is security that operates as an enabler of innovation.

How do you see runtime cloud security evolving for GCCs that manage global, business-critical applications from India?

For GCCs managing global, business-critical applications from India, runtime cloud security will continue to become a central layer of how decisions are made to protect against AI risks. These teams are running business-critical infrastructure for some of the world's largest enterprises, which makes them a high-value target for increasingly sophisticated attacks. The threat landscape has shifted toward real-time attacks targeting AI pipelines, APIs, and cloud-native services directly. Runtime insights bring together signals across posture, behavior, and live traffic, creating a unified view of risk. This enables teams to continuously validate what matters across the lifecycle, from build to production. As AI models become more deeply embedded in GCC workflows, the ability to monitor and protect those systems at runtime, in real time, will become a baseline requirement for every modern enterprise.

What role will real-time threat intelligence and automation play in shaping the future security posture of cloud-first GCCs?

Real-time threat intelligence and automation will play a key role in shaping the security posture of cloud-first GCCs. Real-time intelligence provides immediate context into how threats relate to active workloads, including exploitability, exposure, and potential impact. Automation builds on that context to accelerate investigation and response, connecting signals across environments and surfacing clear actions for teams. Together, they support faster decision-making, reduce operational overhead, and allow GCC teams to manage complex global systems with precision and confidence. ■

Signal 1

Capability-building is the dominant strategy (Capacity vs Capability)

As GCCs in India move beyond their original mandate, the shift is no longer only visible in what work is done, but in how parent organizations are choosing to invest and position their centres. What is taking shape is a clear preference for building capability over expanding capacity.

Parent organizations' strategies for their GCCs

49%

Capability-building: GCCs serve as centers of excellence driving innovation and core capabilities

20%

Efficiency-focused: GCCs are primarily cost centers supporting operations and driving productivity

17%

Expansion-driven: Aggressively scaling up GCC presence and scope (e.g., launching new GCC sites or expanding teams)

- In earlier phases, GCC growth decisions were largely oriented around scaling teams, functions, and scope to meet enterprise demand. Today, priorities are shifting toward deepening innovation-led work within GCCs in India.
- Enterprises are becoming more intentional about which centres they rely on for higher-value initiatives, problem solving, and innovation agendas.
- Capability-building signals a move toward assigning GCCs in India a more central role in the enterprise innovation landscape—one defined by depth of contribution rather than scale of delivery. Centres of Excellence (CoEs) are serving as the primary way in which this intent is operationalized, concentrating innovation-driven work within specific centres rather than treating it as a distributed responsibility.

> "While scale and execution excellence remain foundational, the next phase of GCC evolution is being driven by advanced engineering, R&D, and product-linked innovation. High-value work today is selective and deeply specialized, often emerging from small pockets of excellence within GCCs."

MR. CECIL DANIEL
Managing Director - Global Technology Centre (India), ChampionX

Capability leadership is being designed in, not grown over time

What also stands out is that this orientation is not limited to long-established GCCs alone. While experience and tenure create the conditions for deeper capability ownership, there is growing evidence that some centres are being designed this way from much earlier stages, rather than evolving into it gradually. This suggests that capability leadership is increasingly a matter of intent and structure, not just time.

Capability-building as the predominant GCC strategy (By GCC age)

1-3 years	3-5 years	5-10 years	10+ years
53%	41%	36%	54%

Taken together, this signal highlights a quiet but important divergence. Some GCCs remain optimized as efficient execution engines. Others are being positioned as capability anchors—centres the enterprise depends on for sustained expertise and innovation. That choice shapes not only what a GCC does, but how strategically central it can become over time.

Key Takeaways

- **Capability-building signals growing enterprise confidence in India's ability to support innovation-led work**
  The move toward capability-building reflects a belief that India GCCs have the talent depth, technical maturity, and domain expertise required to contribute meaningfully to innovation, not just deliver against predefined tasks.

- **GCC tenure strengthens capability—but does not solely determine it**
  Longer-established GCCs continue to show stronger capability orientation, yet tenure alone no longer guarantees capability leadership, indicating a more intentional design choice at play.

- **The GCC maturity curve is becoming less linear**
  The uneven distribution of capability-building across age cohorts shows that centres are no longer progressing through a fixed sequence; some are entering the lifecycle already oriented toward innovation-driven roles.

Signal 2

Revenue enablement is the next frontier

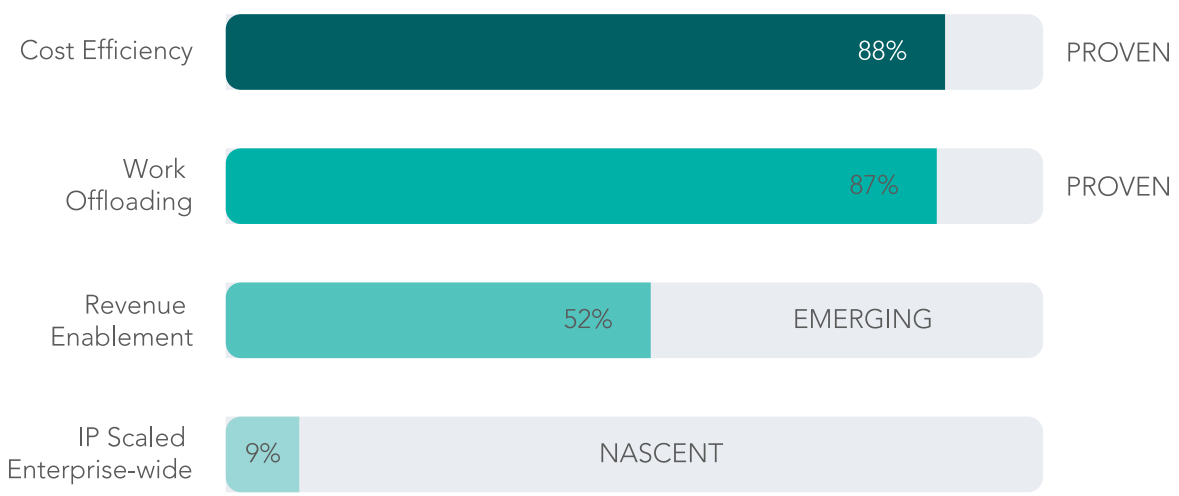
As India GCCs progress beyond efficiency led mandates, the basis of value creation is shifting. Cost efficiency and workload absorption are no longer differentiators—they are assumed. What now separates mature GCCs from the rest is their ability to contribute directly to enterprise growth. This represents a structural redefinition of GCC value, moving the conversation from internal optimization to external impact.

- **Efficiency driven value has reached saturation.**
  Cost efficiency and work offloading are widely established and consistently delivered. These dimensions now define baseline performance rather than strategic advantage.

- **Revenue enablement is emerging as a distinct value layer.**
  A growing share of GCCs are contributing to revenue linked outcomes, indicating early but tangible movement toward growth alignment. This marks a shift from inward facing enablement to business proximate impact.

- **IP led value remains largely unrealised at enterprise scale.**
  While enablement is gaining ground, ownership of enterprise wide, monetisable IP remains limited. The transition from supporting revenue to creating proprietary value is still nascent.

% of GCCs reporting clear / significant value delivered



Source: Dun & Bradstreet

Key Takeaways

- **The GCC value conversation is moving from the CFO's desk to the CEO's agenda.** As cost efficiency becomes table stakes, the strategic relevance of a GCC will increasingly be measured by its proximity to revenue — not its distance from cost. GCCs that cannot articulate growth contribution risk being managed as overhead, not as assets.

- **Revenue enablement requires GCCs to build enterprise context, not just capability.** Contributing to top-line outcomes demands that GCC leaders understand market dynamics, customer segments, and P&L levers — not just internal KPIs. The shift from delivery excellence to revenue relevance is as much a mindset transition as a structural one.

- **IP creation is the most underdeveloped lever — and the highest-return opportunity.** GCCs contributing to revenue through process support are a step ahead. Those that own proprietary assets — models, platforms, accelerators — create compounding enterprise value. Closing this gap is where the next phase of GCC differentiation will be won.

JLL SEE A BRIGHTER WAY

While your HQ rests, your India GCC delivers

Your markets sleep. Your operations won't.

Time zones are competitive strategy. Over 2,000 enterprises operate GCCs in India, with the smartest using advanced analytics and real-time intelligence to identify talent hubs and cost advantages before competitors do.

JLL's integrated approach blends location strategy, workplace design and operations into one seamless capability; an approach hundreds of global enterprises rely on for partnerships that span decades.

See what others miss and move with confidence. Partner with JLL.

jll.com/gcc

Sajo Mathews
ML Lead
Deccan AI

Deccan AI

As enterprises adopt AI at scale, how is Deccan AI helping organisations transition from experimentation to real business impact?

Many enterprises have successfully experimented with AI, but scaling these systems into production requires a different level of operational discipline. The challenge is no longer just model quality. It requires reliability, governance, workflow integration, and the ability to manage AI systems over time.

At Deccan AI, we focus on helping enterprises operationalize AI through structured workflows, human-in-command oversight, and governance-first execution. Our EnterpriseOS platform compiles business processes into orchestrated workflows where deterministic systems, human approvals, and AI models work together in a controlled manner. This allows organizations to move beyond isolated copilots and toward measurable business outcomes.

We also provide assurance and observability through Helix, our evaluation and agent governance layer, which captures execution traces, validates outcomes, and helps enterprises continuously improve system performance. This enables organizations to deploy AI with greater confidence while maintaining compliance, transparency, and operational control.

Which enterprise functions or use cases are seeing the most value from AI adoption today, based on your experience?

The strongest adoption is in functions combining high process volume with significant manual analysis and decision-making. This includes financial services, insurance, healthcare operations, customer support, and enterprise back-office workflows.

Use cases such as underwriting support, claims management, KYC and compliance reviews, document-intensive processes, and enterprise knowledge operations are seeing strong impact, as teams spend substantial effort gathering information, validating inputs, navigating systems, and managing exceptions.

Enterprises are prioritizing AI copilots and semi-automated workflows rather than full autonomy, enabling productivity gains while retaining human oversight for high-risk decisions.

The value lies not just in cost efficiencies, but in improved operational consistency, faster turnaround times, and the ability to scale complex processes without proportionally increasing headcount.

How do you address challenges around trust, governance, and responsible AI while deploying solutions for global clients?

Trust and governance are foundational for enterprise AI adoption. Organizations need visibility into decision-making, workflow behavior in real-world conditions, and early identification of risks before they affect operations.

Our approach centers on traceability, structured oversight, and layered validation. Each workflow execution is monitored through detailed execution traces capturing model interactions, tool usage, approvals, validations, and decision paths, enabling strong auditability and transparency.

We integrate deterministic checks, AI-driven evaluators, and human review mechanisms to assess accuracy, policy adherence, and workflow reliability. Human-in-the-loop controls remain essential for high-impact workflows.

AI governance must extend beyond individual models to the entire workflow, ensuring continuous monitoring, evaluation, and improvement of end-to-end behavior of complex agentic systems. ■

Shilpa Revankar
Co-Founder
Zyeta

How are modern workplaces evolving to support GCCs and global enterprises?

India's GCC story has stopped being about cost and started being about **capability,** that's the macro shift. Globally, enterprises now see real estate not just as a facilities choice, but as a strategic business decision.

The nature of work has grown more complex—multiple functions and work modes coexist under one roof. Designs that don't reflect this complexity end up hindering, rather than supporting, organizations.

What GCC workplaces must now do is three things: **perform, represent, and evolve.** Support diverse work modes, carry the culture honestly, and flex as the business does.

Our work for the IFF GBS Centre in Hyderabad was about setting a new benchmark, not just designing another GCC. That's exactly what we built for the client. A LEED Gold-certified workplace where the facility achieved **33.3% energy savings,** and **30.6% reduction in GHG emission.** Sustainability was a major design decision we made from day one.

At Zyeta, we start with what the business needs to become. Because the office is the most honest thing a company says about what it actually values.

How do sustainability, technology, and employee well-being shape future-ready workplaces?

The bigger shift is quieter but more disruptive—work itself has grown complex, with multiple functions and modes under one roof. Design that doesn't reflect this complexity ends up working against the organization.

The result is buildings that are certified but not experienced. A LEED Platinum workplace with fluorescent lighting, punishing acoustics, and a technology layer that monitors attendance rather than enhancing performance-- that is not future-ready. That is **future washed.**

Future-ready workplaces demand integration—sustainability that people feel (comfort, air quality, biophilia), technology that fades into the background, and wellbeing embedded into every design choice, not added on.

As per WELL building standards, poor indoor air quality can cut cognitive function by up to 50%, directly impacting the core productivity of knowledge workers. Future-ready is a decision you make before the first line is drawn, and every line after it.

How is Zyeta redesigning hybrid workplaces to boost collaboration, productivity, and retention?

Employees constantly weigh if the commute is worth it—making relevance, not space, the core challenge in hybrid workplaces.

Our insight: diverse employees experience the same space differently, with neurodiversity and generational needs shaping productivity, collaboration, and retention in ways most briefs miss.

That realization led us to approach space planning through a lens of **sensory and cognitive calibration,** understanding the stimulus spectrum of the workforce before making a single design decision.

When designing 7 Eleven Global Solutions Centre in Bengaluru, we tailored the space to a stimulus-seeking Gen Z workforce—using neon, movement, sports, and playful elements, precisely calibrated to their needs.

The project won the Asian Design Awards 2026, but more importantly, it achieved a simple outcome: people wanted to be there. ■

Bharatiya Vidya Bhavan's
SPJIMR
EXECUTIVE EDUCATION

CELEBRATING 25 YEARS

The next GCC advantage is *leadership.*

What sets great GCCs apart?

- Outcome ownership
- Stakeholder influence
- Scale transformation

That's the edge SPJIMR Executive Education is built to create.

Explore our programmes at spjimr.org

Post Graduate Executive Management Programme

100+ BATCHES OF PGEMP

21-month modular programme for developing enterprise leaders

Post Graduate Programme in Marketing and Business Management

13-month modular programme for developing sales and marketing leaders

MDP Management Development Programmes

Upskilling and cross-skilling contextualised to your organisation

PGPGM EXECUTIVE Post Graduate Programme in General Management

AICTE Approved 2-year alternate weekend programme for professionals moving into business leadership

Build your next generation of GCC leaders

Meet us at the GCC Summit, Hyderabad.
Scan to know more

Get in touch SPJIMR Executive Education

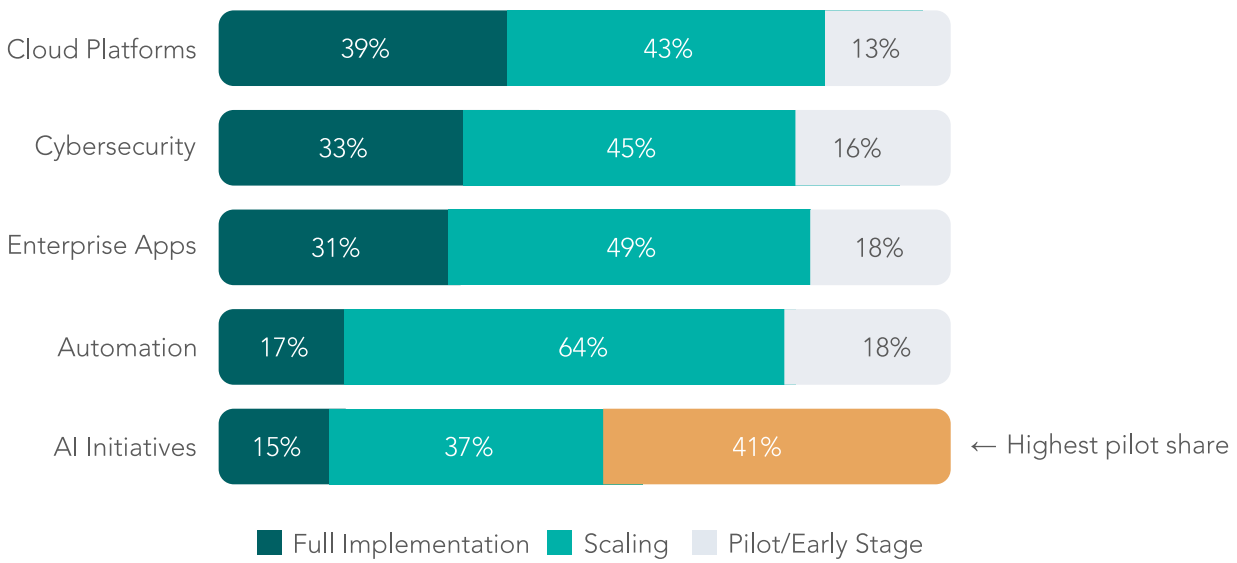
Mumbai 022 61454200 | 022 61460200 | 022 62134420 | **Delhi** +91 9911941090 | info@spjimr.org

Signal 3

AI is the next technology GCCs are getting ready to scale

After efficiency and workload absorption became baseline expectations—and as revenue enablement starts to emerge as the next value frontier—the technology agenda is now pivoting to **enterprise AI adoption.** For India GCCs, this is not about running more experiments; it is about proving the ability to **industrialize AI** at the same pace at which cloud, cybersecurity, and enterprise apps have been scaled.

AI Adoption Maturity Across Technology Domains



Source: Dun & Bradstreet

- **AI is earlier in the maturity curve than the rest of the digital stack.**
  Core platforms are already in execution mode (Cloud Platforms: 39% full, 43% scaling; Cybersecurity: 33% full, 45% scaling; Enterprise Apps: 31% full, 49% scaling). AI Initiatives lag with 15% full and the highest pilot share at 41%, pointing to a clear "pilot-to-production" gap.

- **Strong scaling foundations position GCCs to industrialize AI.**
  Automation is already being pushed through scale pathways (64% scaling), indicating that GCCs have operational discipline to roll out tech change. The limiting factor for AI is therefore less about delivery capacity and more about what it takes to move AI safely into production (repeatability, controls, and enterprise governance).

Key Takeaways

- **The pilot-to-production gap is now the defining AI challenge for GCCs**
  Most GCCs have demonstrated AI works in controlled environments. The next test is whether they can move AI out of sandboxes and into enterprise workflows at scale — with the repeatability, controls, and governance that production demands.

- **Enterprise AI readiness will be measured by governance maturity, not model sophistication**
  As AI moves closer to production, the bottleneck shifts from technical capability to enterprise trust — risk frameworks, audit trails, explainability, and responsible deployment. GCCs that build this infrastructure early will be the ones parent organisations choose to scale through.

"Our early AI experiments were enthusiastic but not always successful, offering valuable lessons that have shaped a far more disciplined, ROI-led approach today, where clear productivity and efficiency metrics guide its application, and adoption has expanded beyond data scientists and developers to become truly enterprise-wide across functions."

MR. DIPU GOPINATH
Director & Country Head, Merative India

"There is no single technology that is universally relevant for every GCC. Technology choices depend on an organization's products, services, and core platforms. What truly matters is how AI is embedded across every layer of the organization—not just in products, but in day to day work and emerging technologies."

MR. PARAS PARIKH
Country Head – India, ACA Group

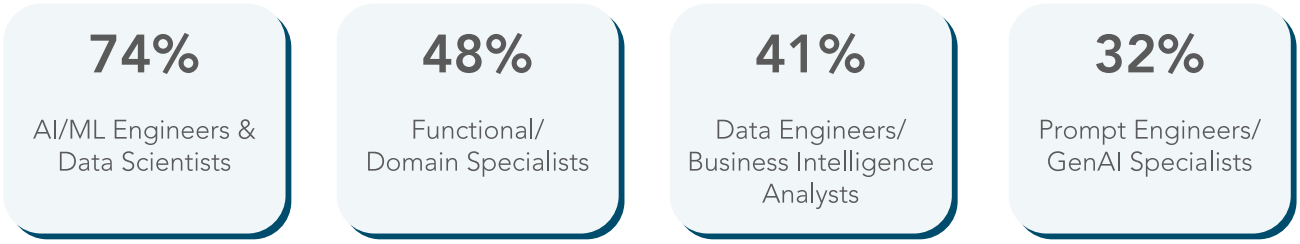
Signal 4

Talent competition is intensifying around AI—domain depth is emerging as a parallel differentiator

Context

As India GCCs accelerate their AI agendas, the talent equation is shifting just as sharply as the technology stack. Demand is no longer concentrated solely on technical AI roles. Instead, the next phase of growth is pulling GCCs toward a more complex talent mix—one that combines AI capability, business context, and leadership depth. This marks a transition from talent accumulation to talent orchestration.

Job roles that GCC leaders believe will be most in demand for their GCC's next phase of growth



Talent development initiatives that GCCs are prioritizing

- **AI skills dominate hiring intent, setting the pace for future capability build out.**
  AI/ML engineers and data scientists clearly anchor demand, reflecting the urgency to build execution depth as AI moves closer to enterprise deployment.

- **Domain expertise ranks immediately behind core AI talent.**
  Strong demand for functional and domain specialists indicates that GCCs are increasingly embedding industry and business context directly into AI and analytics work, rather than treating it as a downstream layer.

- **Talent investment is shifting toward adaptability and leadership, not just specialization.**
  Cross skilling, leadership development, and AI driven learning platforms are being prioritized together—signalling that GCCs are preparing workforces to evolve with technology, not get locked into narrow skill silos.

Key Takeaways

- **AI success in India GCCs will be constrained by talent composition, not talent volume.**
  Hiring more AI specialists alone will not be sufficient. The real advantage will come from teams that combine technical depth with domain understanding and decision context.

- **Cross skilling is becoming a strategic hedge, not an HR initiative.**
  By investing early in multi role capability and leadership strength, GCCs are positioning themselves to absorb rapid shifts in skill demand without repeated external hiring cycles.

- **The next phase of GCC talent strategy will be defined by how well AI and domain expertise are fused.**
  India GCCs that integrate AI capability with deep business knowledge will move closer to owning outcomes. Those that treat domain insight as adjunct risk limiting AI impact to tool level advantage rather than enterprise value.

"Some of the strongest AI teams we built were differentiated not only by engineering depth, but by their ability to combine domain understanding, systems thinking, and business interpretation with scalable technology execution.
Teams that combined enterprise process expertise with startup-style execution agility consistently moved faster from experimentation into production-scale deployment."

MR. VIJAY MORAMPUDI
CoE Leader & SVP - AI, Marsh

PORTFOLIO INSIGHT • ASSET FOCUS

ECOWORLD BENGALURU

Outer Ring Road, Bengaluru | Brookfield Properties | Established 2016

48 Acres	7.7M Sq Ft	15 Blocks	94%
CAMPUS AREA	TOTAL LEASABLE SPACE	GRADE A BUILDINGS	COMMITTED OCCUPANCY

1. MARKET LEADERSHIP & GCC SCALE

In an era where Global Capability Centers (GCCs) are redefining enterprise operations in India, workplace ecosystems must transcend conventional office real estate. Brookfield Properties' Ecoworld Bengaluru stands as India's premier integrated commercial office campus, engineered explicitly to support operational scalability for multinational occupiers.

Featuring expansive, highly efficient floor plates ranging from **25,000 to 66,000 square feet** across 15 completed premium blocks, the campus acts as the corporate anchor for the world's most sophisticated brands, counting **Honeywell, Morgan Stanley, Shell, KPMG, Deloitte, State Street, Standard Chartered, and Cadence** among its key occupiers.

The institutional infrastructure ensures seamless enterprise-grade execution through advanced biometric identity architecture, continuous perimeter CCTV monitoring, on-campus child-care centers, corporate banking hubs, EV charging infrastructure, and smart medical desks.

2. FINANCIAL PERFORMANCE & IMPACT

Beyond its infrastructure excellence, Ecoworld's immense scale serves as a financial multiplier. It represents the single largest asset within the Brookfield India REIT portfolio, single-handedly accounting for **32% of its Consolidated Gross Asset Value (GAV)**.

The asset maintains exceptional operational fundamentals, demonstrating an **In-Place Rent of ₹105 PSF/month** and a highly stable **Weighted Average Lease Expiry (WALE) of 6.1 years**. Organic asset growth potential remains secure with an additional 0.1 MSF development pipeline.

Demonstrating robust organic leasing velocity, the asset finalized a major **224,000 Sq Ft lease renewal** with a leading Global Financial Firm (GFF) in Q4 FY2026, securing a **9% re-leasing spread** over a locked-in 10-year term. Brookfield India REIT retains 100% operational board control and a dominant 87% economic interest in the asset.

3. INTEGRATED PRODUCTIVITY FLYWHEEL

THE BAY
Premium retail, lifestyle galleries, and a highly diversified corporate dining hub.

THE KITCHEN
Six curated, open-air alfresco fine-dining culinary experiences.

ACTIV CENTER
Full-scale wellness ecosystem with an infinity pool, tennis & squash courts, and outdoor gyms.

CULTURE & ART
Integrated amphitheatres and collaborative art spaces designed for community interaction.

4. ENVIRONMENTAL ENGINEERING EXCELLENCE (ESG)

- **Net Zero Waste Framework:** Asia's first business park to achieve Net Zero Waste certification under the LEED ARC platform.
- **Water Stewardship:** True Zero Water Discharge operations powered by advanced ultra-filtration sewage plants.
- **Resource Harvesting:** Fully automated, climate-synchronized rainwater harvesting and drip-irrigated landscaping.
- **AIRE Structure:** Features the iconic sustainable living vertical art installation that naturally purifies micro-climate air.

upwind

Secure every layer of cloud & AI in realtime

The Upwind Cloud & AI Security Platform helps teams secure what is running, exposed, and at risk across their cloud and AI attack surface. Powered by the Runtime Fabric, Upwind combines agentless and sensor-based scanning with realtime context, so teams can understand how their environment actually behaves, prioritize fixes based on real usage, and stop threats as they emerge.

Trusted by hundreds of enterprises around the world

Roku · CARVANA · WM · SIEMENS · WiX · CHECK POINT · bill · PELOTON · ClickUp · agoda

Focus on the cloud and AI risks that matter most

upwind.io

DATASHEET

Control-M and artificial intelligence

Every critical business service — financial close, customer experience, digital channels, analytics, and AI-driven decisions — depends on workflows running reliably and at scale.

Natural language workflow creation | Predictive insights | Continuous optimization | GenAI pipeline orchestration | Enterprise governance

> Control-M has long been the backbone of mission-critical services. Now, with embedded AI, it becomes an intelligent orchestration partner that accelerates delivery, strengthens governance, and improves operational resilience — delivering better outcomes for the business.

CORE CAPABILITIES

Turn complexity into governed outcomes

AI transforms natural language into governed, executable workflows. Organizational knowledge is captured automatically, reducing reliance on specialized skills and accelerating time-to-value.

Anticipate issues before they occur

Embedded AI analyzes historical execution data, runtime behavior, and business context to deliver predictive insights — reducing disruptions and speeding resolution.

Continuous optimization & governance

AI continuously assesses workflow health, identifies optimization opportunities, and auto-generates audit-ready insights — reducing overhead and technical debt proactively.

Operationalize AI and GenAI pipelines

AI initiatives get the same reliability, observability, and governance as traditional enterprise workloads — a seamless part of service delivery, not an experimental sidecar.

THE NEW FOUNDATIONS FOR AI-DRIVEN OPERATIONS

Build smarter.

Design AI and enterprise workflows in minutes using natural language. Let embedded intelligence remove complexity and eliminate bottlenecks.

Manage continuously.

Automate governance, optimize performance, and keep environments clean and efficient. Stay in control, even as operations scale.

Run stronger.

Ensure uptime and reliability with predictive insights that explain what's happening — and what needs attention — before it affects business outcomes.

→ **Unlock the Control-M Demo Experience**

Discover how to accelerate workflow design, improve reliability, and simplify orchestration with hands-on platform demos.

bmc

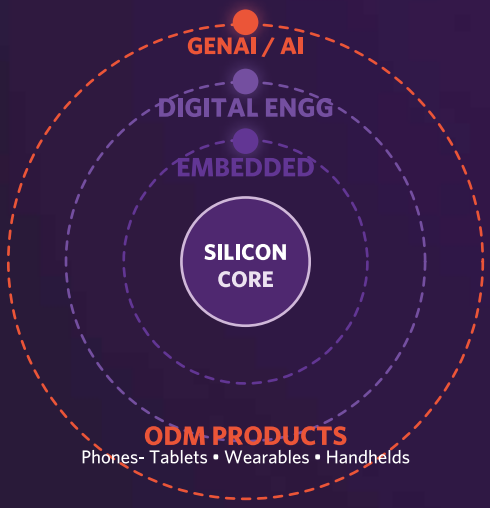
BMC is the automation company for the AI Era. 80% of the Forbes Global 100 trust BMC to automate and orchestrate the systems their businesses depend on.

www.bmc.com

YOUR END-TO-END ENGINEERING PARTNER FOR GCCs

Where Silicon Meets Intelligence.

Full-stack engineering.
From first gate to last inference.



GCCs are rapidly evolving from delivery centers into **global innovation hubs owning the full product lifecycle - from concept to cash.** Sasken brings 35+ years of engineering depth, niche skill pods, certified talent, proprietary frameworks and IPs to help you move from concept to cash, faster.

SILICON ENGINEERING
Custom SoC · RTL Verification · FPGA · Physical Design · BSP/SDK

EMBEDDED ENGINEERING
Firmware · Automotive (ADAS/IVI) · 5G/Modem · IoT · AUTOSAR

DIGITAL ENGINEERING
Cloud Native · DevSecOps · Cybersecurity · Data Governance

GENAI/AI TRANSFORMATION
GenAI Solutions · AI Agents · Pilot to Production · CoE Setup

CHIP-TO-COGNITION

35+ yrs
Engineering heritage

100+
Fortune 500 clients

1B+
Devices powered

CoE Ready
Innovation labs & GCC scale-up

SASKEN

Partner with us · Accelerate your GCC
www.sasken.com | **marketing@sasken.com**

India's GCCs: City Deep Dives

India's GCCs: City Deep Dives

For most of the past decade, India's GCC geography was a hierarchy more than a map. Bengaluru led. Other cities followed, offering variants of the same proposition — talent, cost, scale. The underlying assumption was convergence: as cities matured, they would progressively resemble each other in capability and strategic role.

However, data from our research shows that what is emerging is not convergence but differentiation. Bengaluru, Hyderabad, and Pune are not at different points on the same curve — they are on different curves. Each city is developing a distinct operating identity, shaped by the types of enterprises that have anchored there, the mandates those enterprises have extended, and the capabilities that have deepened as a result. That identity is now influencing how parent organizations allocate work, authority, and investment across their India footprint.

GCC city deep dive




Bengaluru	Hyderabad	Pune	Delhi NCR
74% AI/ML Engineers as top hiring priority — TALENT	**85%** expanded scale of operations – highest city — AUTONOMY	**89%** cross-skilling employees – highest across all cities — TALENT	**82%** AI/ML Engineers most in demand – highest city — TALENT
50% capability-building as GCC strategy — INNOVATION	**77%** leadership & managerial capability building – highest — TALENT	**72%** clear measurable cost efficiency value – highest city — VALUE CREATION	**64%** full decision-making on operational decisions – highest — AUTONOMY
57% co-own strategic objectives with HQ — AUTONOMY	**54%** cloud & platform fully deployed – highest city — TECH MATURITY	**72%** automation & workflow digitization scaling – highest — TECH MATURITY	**64%** work shifted from high-cost markets – measurable value — VALUE CREATION
Pillar strength: ●●○●●	Pillar strength: ●●●●●	Pillar strength: ○●●●●	Pillar strength: ○●○○●
Innovation & Scale Hub	**Autonomy & Talent Leader**	**Cost Efficiency Champion**	**Operational Authority Leader**

PILLARS: ● Innovation ● Autonomy ● Value ● Tech Maturity ● Talent

Bengaluru leads on global talent integration and AI hiring depth

- Bengaluru GCCs show the strongest orientation toward global role ownership — 60% report employees holding multiple global roles with defined accountability, compared to 31% in Hyderabad and 44% in Pune.
- On talent, 74% of Bengaluru GCCs cite AI/ML Engineers and Data Scientists as their top hiring priority, the highest of any city, reflecting the depth of technical talent the city has built over time.
- IP adoption also skews toward Bengaluru — 61% report IP assets contributing to internal capability gains, a function of longer enterprise relationships and more mature innovation mandates.

Hyderabad leads on strategic co-ownership and scaling momentum

- The most striking finding in Hyderabad is not a single number but a convergence of signals pointing in the same direction. 85% of Hyderabad GCCs expanded operational scale in the last three years — the highest of any city.
- 77% describe their role as co-owning strategic outcomes with headquarters, again the highest. 54% report gaining greater strategic decision-making authority over the same period.
- And 69% have AI initiatives in active scaling, compared to 36% in Bengaluru.
- Taken together, these data points describe a city where enterprises are not just expanding headcount but actively transferring ownership — of outcomes, of decisions, and of technology deployment.

Pune leads on workforce adaptability and efficiency value delivery

- Pune's profile is defined by two things that are increasingly valuable in an AI-disrupted environment: operational reliability and workforce flexibility. 72% of Pune GCCs report delivering clear, measurable cost efficiency value — the highest of any city.
- 89% are investing in cross-skilling employees for diverse roles, the highest across all three cities and nearly 20 percentage points ahead of Bengaluru. Pune GCCs are also the most expansion-oriented, with 33% operating under an expansion-driven mandate.
- The picture is of a city building the workforce adaptability infrastructure that will matter most as AI reshapes role requirements across the enterprise.

What the city-level data reflects is that strategic centrality in India's GCC ecosystem is not a fixed attribute — it is earned, through a sequence of compounding investments in scale, ownership, and capability. Bengaluru's current position was not designated; it was built over years of enterprises deepening their reliance, extending more authority, and concentrating more critical work in one location.

That sequence is now visibly underway in Hyderabad. The combination of fastest operational scaling, highest co-ownership rate, strongest AI deployment momentum, and the most consistent gains in strategic decision-

making authority — occurring together, across GCCs of different sizes and sectors —reflects enterprises making a directional choice about where they are willing to deepen their India bet.

Pune, meanwhile, is building the foundations — workforce adaptability, efficiency delivery, expansion intent — that have historically preceded a step-change in strategic elevation. The question it faces is the same one Hyderabad answered through the last cycle: whether operational strength alone is sufficient to attract the kind of ownership transfer that changes a city's strategic profile permanently.

Hyderabad: The rise no one predicted, the momentum no one can ignore

India's #1 destination for new GCCs
Captured 40% of all greenfield setups in the last 3 years, overtaking every other city

86 new GCCs launched in 2025 alone
Including 34 Fortune 500 names like Vanguard, Netflix, McDonald's, Costco, and American Airlines

Big-ticket commitments are pouring in
2025: Amgen ($200M), HCA Healthcare ($75M), DAZN (INR 500 Cr) — these are not pilot projects, they are strategic anchors

Record-breaking real estate
11.4 mn sq ft of office space absorbed in 2025 — Hyderabad's best year ever

Sector depth that no other city matches
Home to R&D hubs for 9 of the world's top 18 biopharma companies, plus deep BFSI, SaaS, cloud, and cybersecurity capability

A government that moves at startup speed
TS-iPASS single-window clearance, SEZ incentives, and a dedicated GCC playbook with NASSCOM make Hyderabad one of India's easiest cities to set up in

ZYETA

A low carbon-high impact workspace that cuts cost, carbon & complexity

IFF Global Business Services Center
Designed & Built by ZYETA

Project Area: 75,000 sq.ft | Scope: Design & Build, LEED
Location: Prestige Skytech Park, Hyderabad | Year of Completion: 2025

When Fortune 500 leader IFF established its Global Business Services hub in Hyderabad, they needed a workplace built for performance — operationally, environmentally, and experientially. Zyeta delivered a carbon-conscious, LEED Gold environment that measurably reduced costs from day one.

Performance Delivered

LEED Gold Certified	**33.3%** Energy Savings against ASHRAE 90.1-2010 baseline.	**30.6%** Reduction in GHG Emissions
~50% Reduction in Indoor Water Use	**81.9%** of Water Demand met through treated STP water for flushing and HVAC	**Gold Winner:** International MUSE Design Awards 2026 **Featured In** Archello, International Design Publication

A next-gen design approach rooted in a low carbon, high impact ideology

Landmark Spaces

Innovation Studio
Purpose-built lab for automation, robotics, and artificial intelligence

Collaborative Workspaces
Neighbourhood zones with "Islands" and "Oasis" settings for agile teamwork.

Precision LED Lab
Specialist laboratory environments with advanced R&D; capabilities.

The Experience Centre
AV-equipped showcase transforming IFF's global portfolio into a lived visitor experience.

Trusted by Global GCC Leaders

Zyeta continues to design the future of work for the world's most innovative organizations, including:

7-Eleven GSC | Sandoz | Magna International | Heineken | StoneX
Fidelity International | Carrier | Callaway Technologies | Ecolab | DigiKey

Scan to explore the project in detail

Building Abacus India

From GCC Foundation to AI-Led Healthcare Operations

> *I am impressed by how DCT's GCC model combines cost efficiency with remarkable scalability. Their flexibility has been pivotal in enabling us to meet our strategic goals with speed.*
>
> **Frank Hunt**
> **CFO, Abacus Insights Inc**

Executive Overview

When Abacus Insights began expanding its global capabilities, the vision extended far beyond a conventional offshore delivery center. The goal was to build a scalable India ecosystem capable of supporting healthcare engineering, operational scale, product innovation, and future AI-led transformation initiatives.
To bring that vision to life, Abacus Insights partnered with Digital Convergence Technologies (DCT).
Over the last three years, DCT worked alongside Abacus Insights through every phase of the journey, from foundational setup and governance to engineering expansion, integrated operations, leadership onboarding, and the development of specialized Centers of Excellence across Product Engineering, Interoperability, AI-led operations, and corporate support functions.
What began as an implementation initiative evolved into a mature healthcare engineering ecosystem supporting critical business and technology functions across the organization.

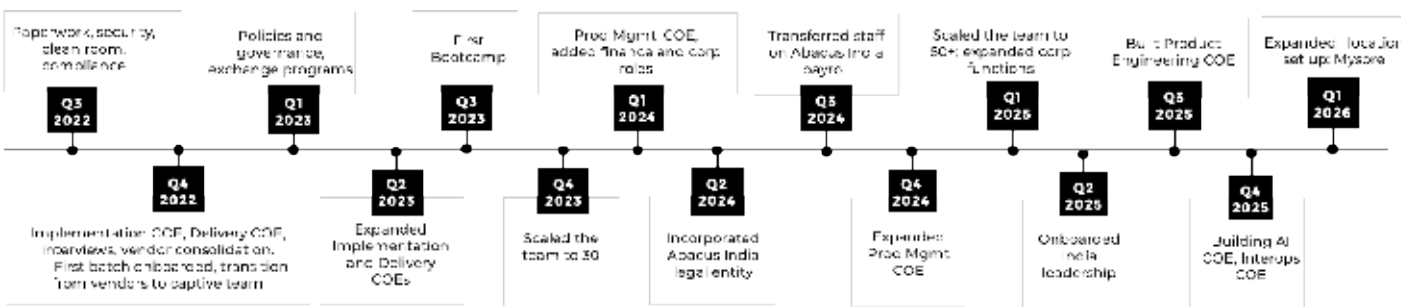
Building the GCC Ecosystem

The engagement began with establishing secure delivery operations in Pune, supported by enterprise-grade governance, clean room environments, onboarding frameworks, and healthcare delivery standards aligned to ISO 27001, SOC 2 Type II, HITRUST, and HIPAA-compliant operational practices.
As the GCC evolved, DCT helped expand the India ecosystem into a unified model built around integrated operations, bringing together engineering, delivery, interoperability, AI-led operations, and corporate support functions including Finance, HR, and Governance.
Over time, the operational footprint expanded beyond Pune into additional locations including Mumbai and Mysore, enabling broader regional access, operational resilience, and long-term scalability.

From GCC Scale to AI-Led Operations

As Abacus India matured operationally, the partnership evolved toward AI-led healthcare operations and intelligent engineering workflows.
Rather than positioning AI as a standalone initiative, DCT helped embed AI readiness into the broader operational ecosystem through AI and interoperability-focused Centers of Excellence supporting intelligent healthcare workflows, healthcare data standardization, scalable engineering operations, and future automation initiatives.
By combining healthcare expertise, engineering scale, and integrated operations, DCT helped establish a strong foundation for long-term AI-led healthcare transformation.

A Three-Year GCC Evolution Journey



Business Impact

- Established and scaled Abacus India operations over a three-year period
- Built multiple Centers of Excellence across Engineering, AI, Interoperability, Product Management, and Operations
- Enabled integrated technical and corporate operations under a unified GCC model
- Expanded operations across Pune, Mumbai, and Mysore
- Enabled secure and HIPAA-compliant healthcare engineering operations aligned to enterprise standards
- Built a future-ready healthcare engineering ecosystem designed for long-term innovation and scalability

Today, Abacus India operates as far more than a delivery center. It stands as a strategic extension of the company's global healthcare innovation vision combining engineering scale, integrated operations, healthcare expertise, and future-ready AI capabilities within one unified ecosystem.

YOUR RELIABLE GLOBAL TWIN IN INDIA

XTGlobal GCC-as-a-Service

> Most GCC partners show you a vision. We show you the vision — and the reality.
>
> *As we provide move-in ready office spaces and ready-to-deploy teams.*

The GCC pitch is everywhere now. What's harder to find is a partner who has built one, governed one, and delivered IT services for over two decades, from state-of-the-art office spaces in Visakhapatnam and Hyderabad.

A **GCC is a long-term commitment**, so we let you start small with a low-minimum-seat pilot, prove the fit, and then scale.

Why XTGlobal

A real GCC, not staff augmentation: Your cadence, your governance, your center of excellence held with you.

Two sites, one operating standard: Visakhapatnam runs production and Hyderabad runs redundancy.

Capacity that scales: Over 200,000 sq ft across the two sites. Room for 6,000+ seats with multiple global shifts.

As your GCC partner, XTGlobal brings IT expertise, delivery discipline, and the kind of presence that earns its place in your operating reviews, your audits, and your board updates for years to come.

We'd rather you visit, meet the delivery leaders, and see how the floor runs before you sign anything.

Facility Visit: Scan for a Virtual Tour of Our Ready-to-Occupy Offices

xtglobal.com/GCC

Our Tech Partners & Certifications

ORACLE | Partner · Microsoft · UiPath

CMMI DEV | ML3 APPRAISED — Appraisal # 67950 | Exp. Oct 31, 2026 · HIPAA COMPLIANT · AICPA SOC · ISO 27001

www.xtglobal.com

info@xtglobal.com

+91 98851 22995

dun & bradstreet

Unlock Global Insights With Dun & Bradstreet's Country Insight Reports

Dun & Bradstreet's Country Insight Reports and Snapshots provide essential forecasts and business recommendations for 132 economies, empowering your business to navigate emerging challenges and seize opportunities for market expansion and long-term investment.

The Reports Offer

- Forecasts and Business Recommendations: Stay ahead of the curve with clear, actionable insights tailored to each economy
- Concise, Visual Overview: At-a-glance graphics allow for easy identification of market trends and risks
- 14 Key Dimensions: Gain in-depth analysis on critical factors such as FX Risk, Market Potential, Business Continuity, Regulatory Environment, and Political/Insecurity Risk

Enables You To

Identify Risks and Opportunities: Navigate cross-border business with confidence by understanding the risks and opportunities in countries and regions where you operate

Compare Exposure Levels: Assess and compare your country risk exposure through our proprietary data, giving you a clearer understanding of your global footprint

Ensure Business Continuity: Evaluate supply chain vulnerabilities, mitigate potential disruptions, and uncover emerging market opportunities

Contact us at - +91 7969019528 | india@dnb.com 8657943769 www.dnb.co.in
@DunandBradstreetIndia @DNB_India @Dun&BradstreetIndia

India's GCCs: Sector Deep Dives

India's GCCs: Sector Deep Dives

India's GCC evolution is not only creating differentiated city-level roles; it is also producing distinct sector-level operating identities. Across sectors, GCCs are no longer converging around a single maturity pathway. Instead, each sector is showing a different combination of strength across innovation, autonomy, value creation, technology maturity, and talent.

The sector data shows that strategic repositioning is being shaped by the nature of enterprise demand within each industry. Technology, IT & Digital GCCs are furthest ahead on autonomy and AI deployment. Manufacturing GCCs are translating market shifts into enterprise value while prioritizing cross-skilling. Financial Services GCCs remain strong on measurable efficiency value and automation scale, but show a clear AI enterprise-scale gap. Healthcare & Life Sciences GCCs stand out on IP adoption and operational authority, while Energy & Minerals GCCs are most strongly oriented toward capability-building, strategic co-ownership, and domain-led talent.

What emerges is not a simple ranking of sectors, but a map of different maturity archetypes. Each sector is building strategic relevance through a different route : autonomy, value, automation, IP adoption, capability-building, or domain depth.

Technology, IT & Digital leads on autonomy and enterprise-scale AI maturity

AUTONOMY	TECH MATURITY	TALENT
64%	29%	75%
hold full operational decision-making authority	AI initiatives deployed enterprise-wide (highest sector)	AI/ML Engineers as top hiring priority

- Technology, IT & Digital GCCs show the strongest autonomy profile, with 64% holding full operational decision-making authority, indicating that enterprises in this sector are more willing to move decision rights closer to the GCC.
- The sector is also the most advanced on enterprise AI deployment, with 29% reporting AI initiatives deployed enterprise-wide - the highest among the sectors shown - suggesting stronger progress in moving AI from pilots into scaled enterprise use cases.
- Talent demand is strongly AI-led, with 75% citing AI/ML Engineers as a top hiring priority, reinforcing that technical depth is central to the sector's autonomy and technology leadership.

Taken together, these data points position the sector as the most autonomous and AI-advanced, with strength visible across autonomy, technology maturity, and talent.

Manufacturing leads on work-shift value and workforce cross-skilling

VALUE CREATION	TALENT	TALENT
60%	90%	85%
significant enterprise value from high-cost market shifts	prioritize cross-skilling — highest across all sectors	cite AI/ML engineers as most in-demand role

- Manufacturing GCCs are strongly linked to enterprise value creation from high-cost market shifts, with 60% reporting significant enterprise value from such shifts, showing that the sector is using GCCs as a lever for market-linked efficiency and business value.
- The sector shows the highest emphasis on cross-skilling, with 90% prioritizing cross-skilling across roles -the highest across all sectors - indicating that workforce adaptability is becoming central to its operating model.
- AI talent remains central to the sector's hiring agenda, with 85% citing AI/ML Engineers as the most in-demand role, suggesting that Manufacturing is pairing work-shift value with the technical capability needed for digital and AI-led transformation.

This makes Manufacturing a work-shift value champion: the sector is combining cost-market repositioning with workforce adaptability and strong AI talent demand.

Financial Services leads on measurable efficiency value, but lags on enterprise-scale AI

VALUE CREATION	TECH MATURITY	TECH MATURITY
69%	0%	85%
clear measurable cost efficiency value (highest)	AI/GenAI at enterprise scale — widest sector gap	automation currently in scaling phase (highest)

- Financial Services GCCs report the strongest cost-efficiency outcomes, with 69% delivering clear measurable cost efficiency value - the highest among the sectors shown - confirming that efficiency delivery remains the sector's clearest GCC strength.
- The sector is also highly active on automation, with 85% reporting automation currently in the scaling phase - again the highest among the sectors shown - indicating strong process discipline and readiness to scale operational transformation.
- However, Financial Services shows the widest AI enterprise-scale gap, with 0% reporting AI/GenAI at enterprise scale, suggesting that AI adoption is still constrained before broader production deployment.

The sector therefore presents a split profile: cost leadership and automation scale are strong, but AI/GenAI maturity has not yet translated into enterprise-scale deployment.

Healthcare & Life Sciences leads on IP adoption and AI experimentation

INNOVATION	AUTONOMY	TECH MATURITY
22%	**70%**	**50%**
IP widely adopted across enterprise (highest sector)	hold full operational decision-making authority	AI/GenAI in active pilot or prototype stage

- Healthcare & Life Sciences GCCs report the highest level of enterprise-wide IP adoption, with 22% indicating that IP is widely adopted across the enterprise, showing that the sector is using IP as a visible route to enterprise capability creation.
- The sector also shows a strong autonomy profile, with 70% holding full operational decision-making authority, indicating that Healthcare & Life Sciences GCCs are being trusted with meaningful operational control.
- AI/GenAI maturity is still concentrated in experimentation, with 50% reporting AI/GenAI in active pilot or prototype stage, suggesting that the sector is actively testing AI use cases but has not yet fully converted experimentation into scaled deployment.

This positions Healthcare & Life Sciences as IP innovators in AI experiment - strong on IP and autonomy, but still working through the transition from experimentation to scaled AI deployment.

> "The most impactful AI use cases are preventive and predictive. Whether it is optimizing access to care, improving consumer behavior, or enabling better experiences, AI creates value when it intervenes early and helps reduce avoidable costs."

MR. PAWAN SACHDEVA
Managing Director – Digital and Health Services,
Carelon Global Solutions India

Energy & Minerals leads on capability-building, strategic co-ownership, and domain-led talent

INNOVATION	AUTONOMY	TALENT
83%	**100%**	**83%**
capability-building strategy — highest sector	operate on strategic co-ownership model	domain specialists as top talent demand

- Energy & Minerals GCCs show the strongest capability-building orientation, with 83% pursuing a capability-building strategy - the highest among the sectors shown - indicating a deliberate shift from capacity expansion toward deeper capability ownership.
- The sector also stands out on strategic co-ownership, with 100% operating on a strategic co-ownership model, showing that GCCs in this sector are closely embedded in enterprise priorities and shared outcomes.
- Talent demand is highly domain-led, with 83% citing domain specialists as the top talent demand, reinforcing that sector differentiation is being driven by business and industry depth rather than technology skills alone.

This creates a capability-first, domain-driven profile: Energy & Minerals GCCs are defined less by scale alone and more by capability depth, ownership, and domain expertise.

What the sector-level data reflects

The sector-level data reinforces the broader GCC repositioning story. Strategic centrality is no longer being defined by cost efficiency alone; it is being shaped by the specific capability each sector is building and the enterprise problem each sector is solving.

Technology, IT & Digital reflects the most advanced autonomy and AI deployment profile. Manufacturing reflects the strongest combination of work-shift value and cross-skilling. Financial Services reflects measurable efficiency and automation scale, but also the clearest AI enterprise-scale gap. Healthcare & Life Sciences reflects IP-led innovation and active AI experimentation. Energy & Minerals reflects the strongest capability-building and strategic co-ownership model.

Together, these patterns show that GCC sector maturity is becoming more differentiated. The next phase of sector-level GCC evolution will not be about every sector moving along the same path. It will be about how each sector converts its strongest pillar - autonomy, value, technology maturity, innovation, or talent - into sustained enterprise relevance.

The Way Forward

The signals emerging from the top-performing GCCs point to a clear shift in what defines leadership in the ecosystem. While capability-building, co-ownership, and excellence execution have become baseline expectations, a smaller set of GCCs are beginning to convert these into sustained enterprise influence.

What distinguishes this cohort is not incremental improvement, but a reorientation of focus—away from efficiency-led contributions toward enterprise-facing impact, technology ownership, and long-term value creation.

What the next phase demands

The transition ahead for GCCs is less about identifying new priorities and more about accelerating the conversion of existing investments into enterprise impact. Three shifts are becoming central to this transition

1. **Shift from efficiency-led mandates to revenue alignment**

   The emphasis is moving from internal productivity metrics toward contribution to enterprise growth. GCCs that anchor their objectives more closely to business outcomes are more likely to expand their role within the enterprise.

2. **Industrialize AI from pilot to platform**

   The challenge is no longer validating AI use cases but embedding them into enterprise workflows at scale. This requires stronger governance, reusable architecture, and sustained capability-building to move beyond isolated experiments.

3. **Earn autonomy through sustained enterprise impact**

   Autonomy is not expanding uniformly—it is accruing to GCCs that demonstrate consistent value at scale. GCCs that align capability, execution, and enterprise outcomes are better positioned to convert influence into formal decision authority over time.

> The next phase of GCC evolution will be defined by AI driven automation and agent based collaboration, with leadership accruing to centres that adapt early and deliberately to these shifts.

MR. SRINIVAS SAMPATH
Vice President R&D and Site Leader, Upland Software India Pvt. Ltd.

dun & bradstreet

Finance Solutions

Predictive data insights and AI-driven platforms that empower finance teams to better manage risk and improve operational efficiency.

Platforms

- D&B Credit
- D&B Direct for Finance
- D&B Connect

Solutions

- Credibility Reports
- Project Appraisal Services
- Trade Exchange Program

Contact us at - +91 7969019528 | india@dnb.com 8657943769 www.dnb.co.in
@DunandBradstreetIndia @DNB_India @Dun&BradstreetIndia

Authors
Learning & Economic Insights Group

Editor

Mihir Shah
Head – Research
E-mail: shahmi@dnb.com

Editorial Team

Rohit Gadbail
E-mail: gadbailr@dnb.com

Surender Khalsa
E-mail: khalsas@dnb.com

Zinnia Banerjee
E-mail: banerjeez@dnb.com

Rohit Pawar
E-mail: pawarro@dnb.com

Designer

Mohan Chilvery

dun & bradstreet

Disclaimer:

Dun & Bradstreet makes no representations or warranties, express or implied, with respect to information provided and the results of the use of such information, including but not limited to implied warranty of merchantability and f itness for a particular purpose, warranties of accuracy, completeness, or currency. Neither Dun & Bradstreet nor any of its parents, subsidiaries, affiliates or their respective partners, officers, directors, employees or agents shall be held liable for any damages, whether direct, indirect, incidental, special or consequential, including but not limited to lost revenues or lost profits, arising from or in connection with use or reliance on the information provided in this report. Recipients of these reports are responsible for determining whether the information contained herein is sufficient for use and shall use their own skill and judgement when choosing to rely upon the reports.