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SIGNALS OF CHANGE

INSIDE INDIA'S GCC EVOLUTION

2026

NCR EDITION

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GCC SUMMIT 2026

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A Special Thanks

To these business leaders for their invaluable insights.

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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.

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.

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.

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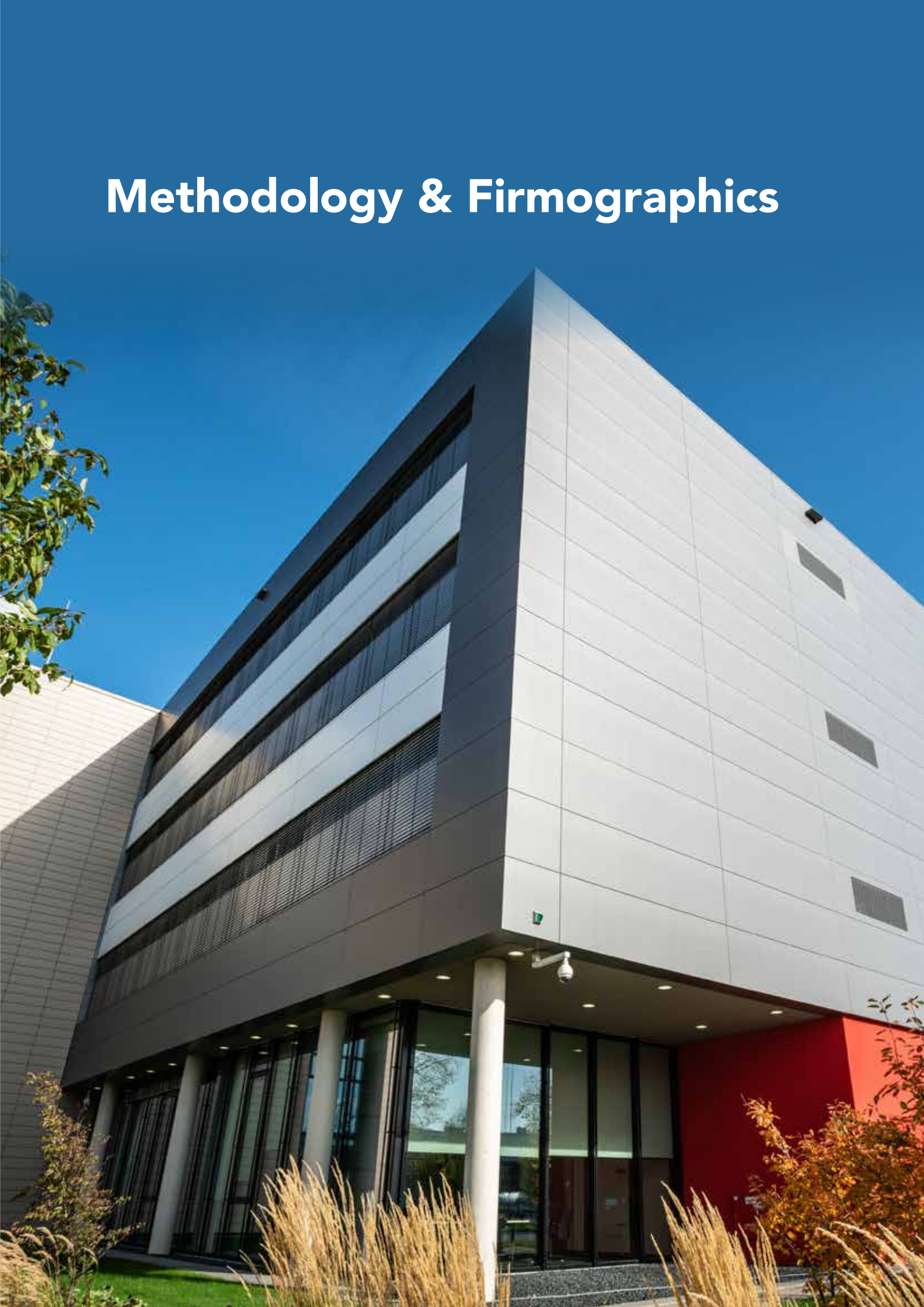
Methodology & Firmographics



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

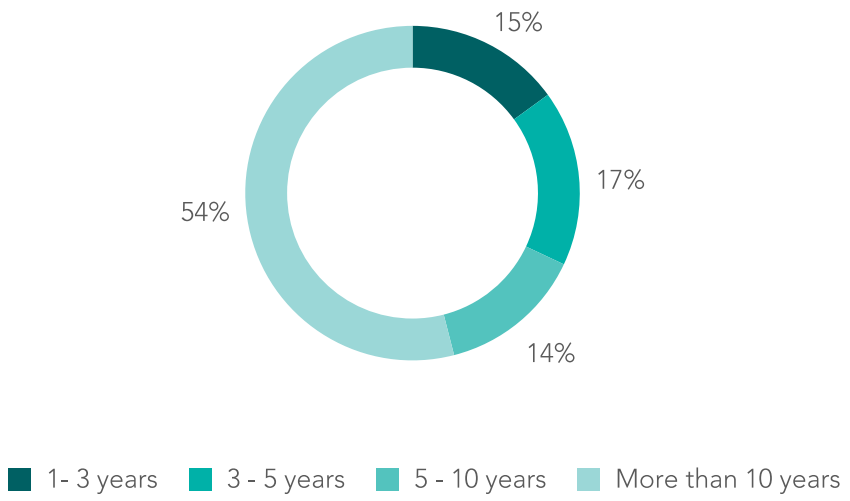
Survey findings have been **supplemented with 10 in depth interviews with GCC leaders,** including centre heads and senior executives. These discussions provide context to the quantitative results, validate emerging themes, and explain the drivers behind observed shifts in GCC role and positioning.

Analysis Approach

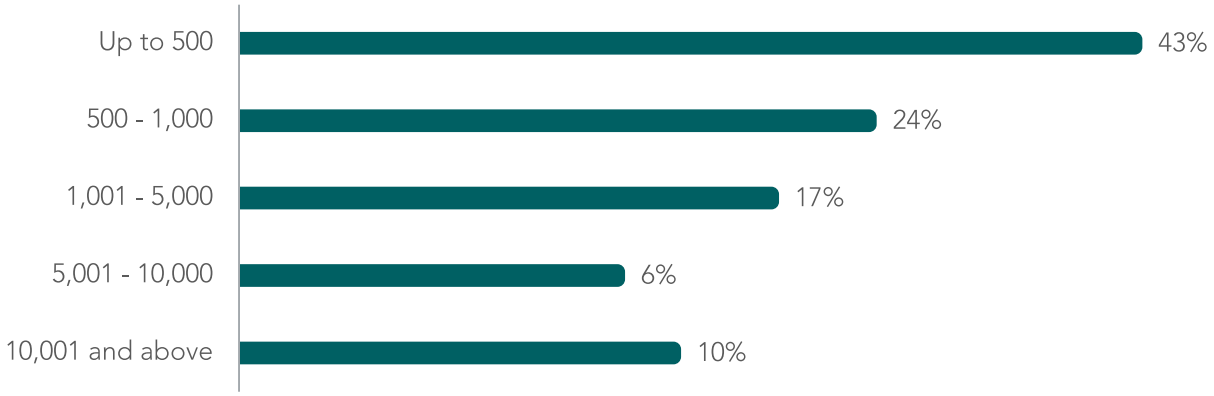
Survey data is analysed at an aggregate, sectoral, and city level. Insights from leadership interviews are triangulated with survey findings to strengthen interpretation and surface enterprise level signals beyond standalone metrics.

Firmographics

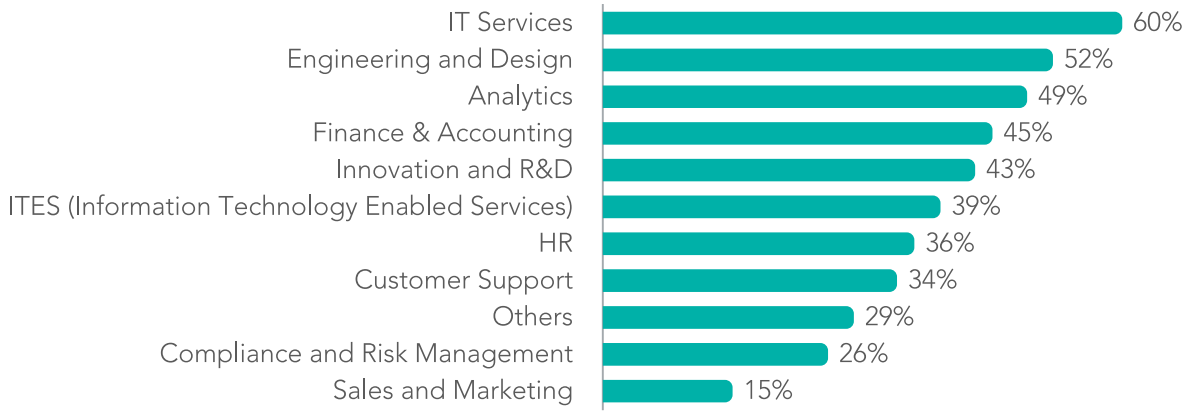
GCC Tenure



India GCC headcount (including contractual employees)



Primary function of the GCC



Revenue enabled for parent organization in FY25

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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%

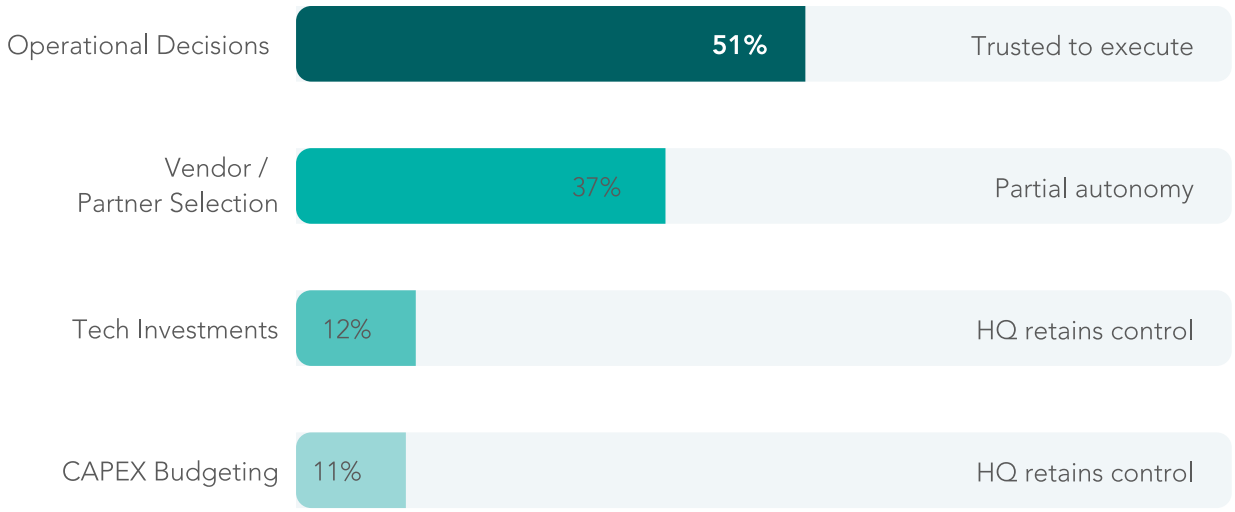
describe their GCC's role as **"Co-owner"** — shared responsibility with HQ

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

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

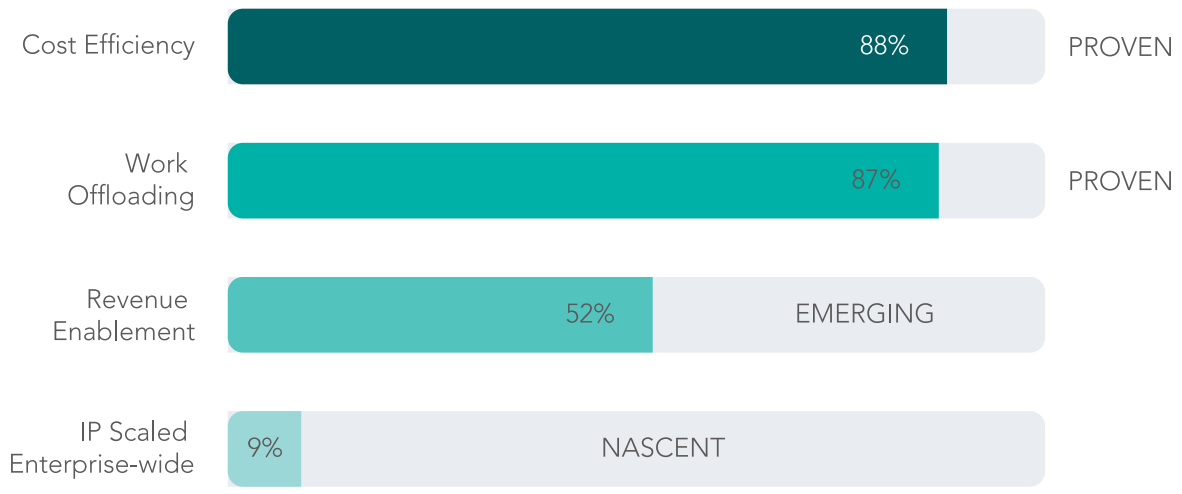
As India GCCs progress beyond efficiency led mandates, the basis of value creation is shifting. Cost efficiency and workload absorption are no longer differentiators—they are assumed. What now separates mature GCCs from the rest is their ability to contribute directly to enterprise growth. This represents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

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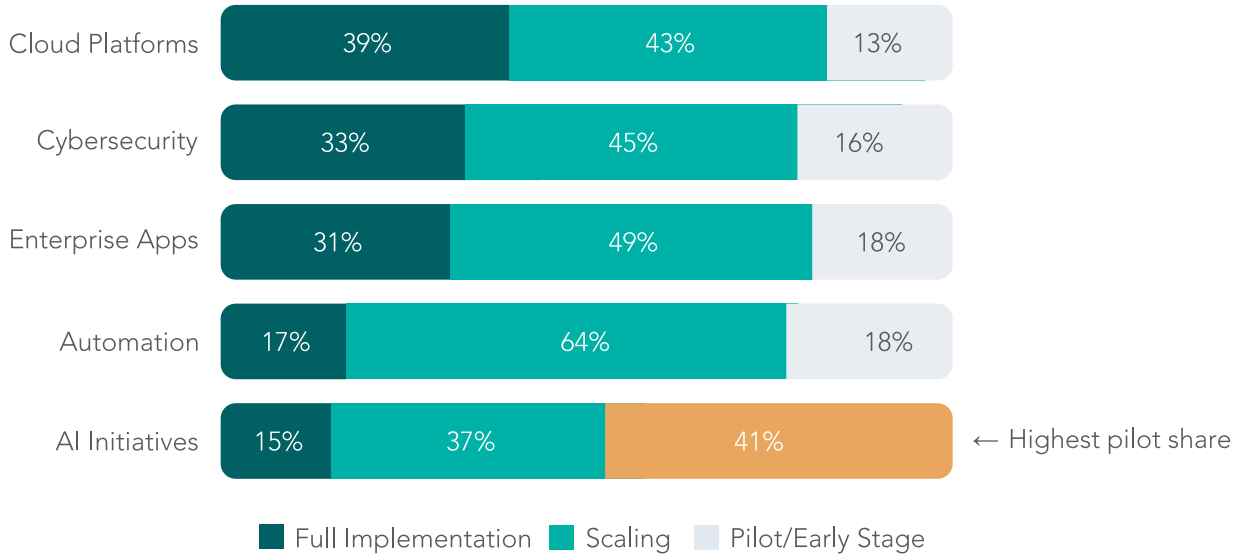
Signal 3

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

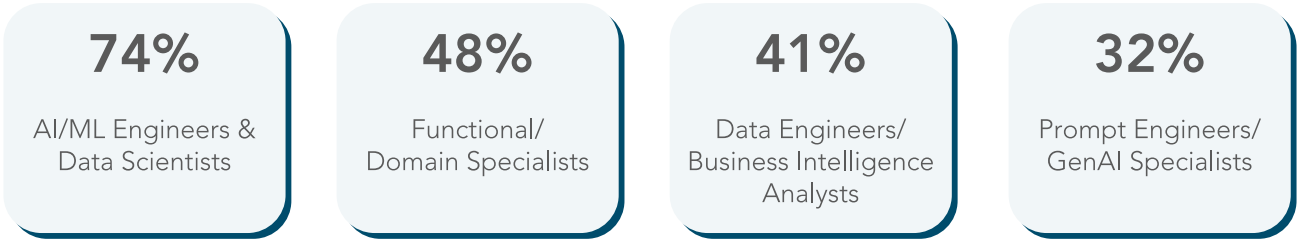
Signal 4

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

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India's GCCs: City Deep Dives

India's GCCs: City Deep Dives

For most of the past decade, India's GCC geography was interpreted through a simple lens: scale. Bengaluru led, other cities followed, and maturity was assumed to converge over time. The expectation was that GCCs would ultimately resemble one another as they expanded their mandates and capabilities.

Our research suggests a different reality. India's leading GCC cities are not converging toward a common model. They are differentiating.

The distinction becomes clear when maturity—not volume—is used as the lens. Cities with large numbers of initiatives in scaling mode are often portrayed as leaders, yet enterprise-wide adoption remains concentrated elsewhere. Similarly, operational authority, innovation outcomes, workforce models, and technology deployment are maturing at different rates across locations.

The result is the emergence of four distinct GCC identities




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 remains India's capability and innovation engine

GCCs in the city continue to exhibit the strongest concentration of globally accountable talent and the deepest orientation toward advanced technical roles. Innovation is increasingly embedded into enterprise operating models rather than being confined to standalone initiatives.

Hyderabad has become India's most mature technology execution hub

Across cloud modernization, data platforms, AI deployment, and cybersecurity ownership, Hyderabad consistently records among the highest levels of enterprise-wide implementation. The city is increasingly trusted not only to build technology but to operationalize it at scale.

Pune's strength lies in workforce adaptability and delivery efficiency

GCCs in Pune report the strongest measurable cost outcomes, the highest cross-skilling rates, and a workforce model designed for flexibility. As enterprises reconfigure operating models around AI and automation, these capabilities are becoming strategic differentiators.

Delhi NCR occupies a different position. Rather than competing on technical specialization alone, NCR has become the city most associated with operational authority

GCCs in the region hold the highest level of operational decision-making authority in India and are increasingly entrusted with enterprise execution responsibilities. The next stage of NCR's evolution will depend on how effectively that authority is translated into technology ownership, innovation output, and enterprise-wide value creation.

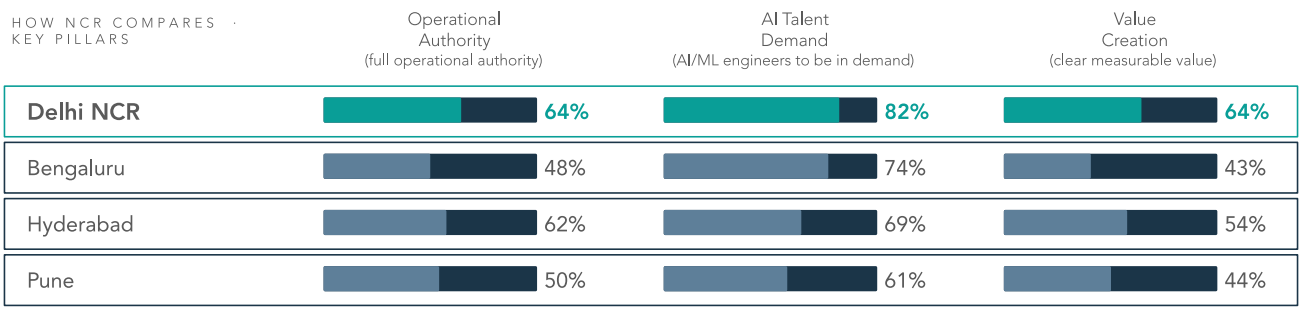
The defining insight is that leadership in India's GCC ecosystem is no longer determined by scale alone. Strategic importance is increasingly shaped by the combination of autonomy, capability depth, technology maturity, and enterprise impact.

Delhi NCR Runs the Show. Now it Needs to Own the Outcome

Delhi NCR stands apart from India's other GCC hubs not because it leads on every measure, but because it has already secured something many GCCs are still pursuing: trust.

Delhi NCR Runs the Show

HIGHEST IN INDIA	HIGHEST IN INDIA	VALUE PROVEN
82%	**64%**	**64%**
AI/ML Engineers job roles to be most in demand	Full operational decision authority	Work shifted from high-cost markets



Delhi NCR occupies a distinct position within India's GCC landscape. While Bengaluru's profile is defined by capability depth and Hyderabad's by technology deployment maturity, NCR stands out for the breadth of operational responsibilities handled within its GCC ecosystem. Across the cities studied, NCR reports the highest incidence of full operational decision-making authority, alongside strong participation in shared decision-making across areas such as technology investments, operating budgets, capital expenditure planning, and vendor-partner selection.

These characteristics suggest a GCC market that has evolved beyond narrowly defined execution mandates. However, operational responsibility is only one dimension of maturity. The most advanced GCCs increasingly distinguish themselves through enterprise-wide technology adoption, innovation outcomes, and measurable business impact. The analysis that follows examines how NCR compares these dimensions and where its next stage of evolution is likely to emerge.

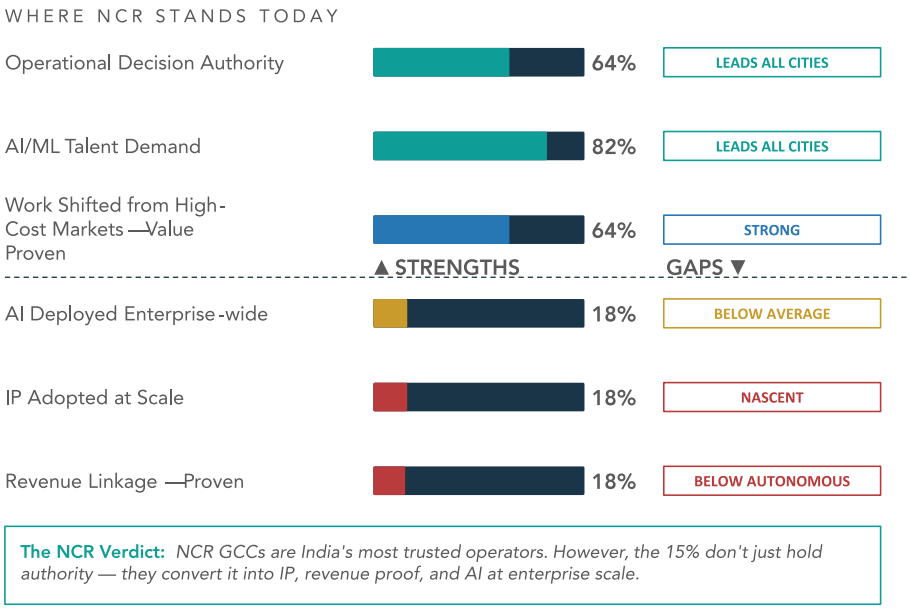
NCR leads on operations — but lags where the 15% separate themselves

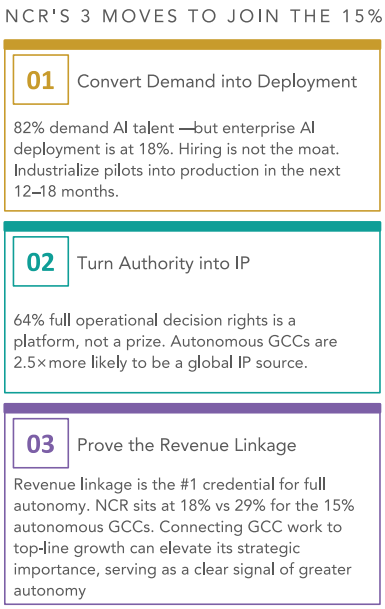
The analysis of the top 15% of GCCs earlier in the report revealed a consistent pattern: the organizations furthest along the maturity curve distinguish themselves not through scale or activity levels, but through outcomes. Enterprise-wide technology deployment, broad adoption of internally generated intellectual property, and demonstrable business impact emerge as the characteristics that separate this group from the broader GCC market.

Against this backdrop, Delhi NCR presents a distinctive profile. The region records the highest incidence of full operational decision-making authority among the cities studied, alongside significant participation in shared decision-making across areas such as technology investments, operating budgets, capital expenditure planning, and vendor-partner management. It also reports strong demand for AI talent and clear value from work transitioned from higher-cost markets.

The comparison with the top 15% therefore highlights less a capability gap and more a maturity gap. NCR's strengths are concentrated in operational ownership and enterprise responsibility, while the outcome-oriented indicators associated with the most advanced GCCs remain less developed. The following analysis examines where NCR aligns with the characteristics of leading GCCs and where further progress is required to convert operational breadth into enterprise-wide impact.

NCR leads on operations — but lags where the 15% separate themselves





Delhi NCR's trajectory illustrates an important distinction in GCC evolution: operational maturity and strategic maturity do not always progress at the same pace. The region has already established a strong foundation through the breadth of responsibilities managed within its GCC ecosystem. The next phase will be defined less by expanding those responsibilities and more by deepening their impact. As enterprises increasingly evaluate GCCs on their contribution to innovation, technology adoption, and business outcomes, NCR's ability to convert operational strength into enterprise-level influence will determine how closely it aligns with the characteristics of the most mature GCCs.

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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.

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