

What's next for India's GCCs?

Global Capability Center (GCC)
Pulse Survey 2025

November 2025



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The better the answer.
The better the world works.



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Preface



Arindam Sen

Partner,
GCC Sector Lead,
Non-FS, EY India



Manoj Marwah

Partner,
FS GCC Consulting Lead,
EY India

How EY can help

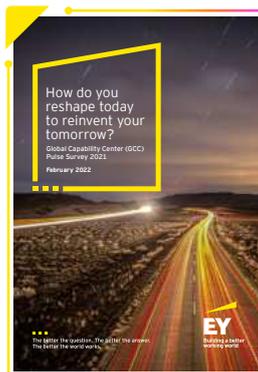
Connect with
Sayan.Banerjee@in.ey.com
to get the previous survey
editions.

The story of India's Global Capability Centers (GCCs) has entered a new chapter. The EY GCC Pulse Survey 2025 reveals that they are emerging as **Innovation Orchestrators**, steering digital transformation, building IP, and influencing enterprise strategy at a global scale.

This shift is essential for the sector's growth, as future success will depend on high-value services, engineering, research and development, and expertise in advanced digital technologies. The findings from 2025 show a clear shift towards digital transformation and an expanding functional scope. GCC leaders today expect their centers to play a crucial role in leveraging artificial intelligence (AI) and technology platforms to create future value.

This report highlights the priorities, investments and challenges that shape this new phase. It aims to provide insights into how GCCs are developing the talent and technology needed to become key drivers of intelligent automation and digital change for their global businesses. We thank all participants for their valuable contributions to this report.

2022 edition



2023 edition

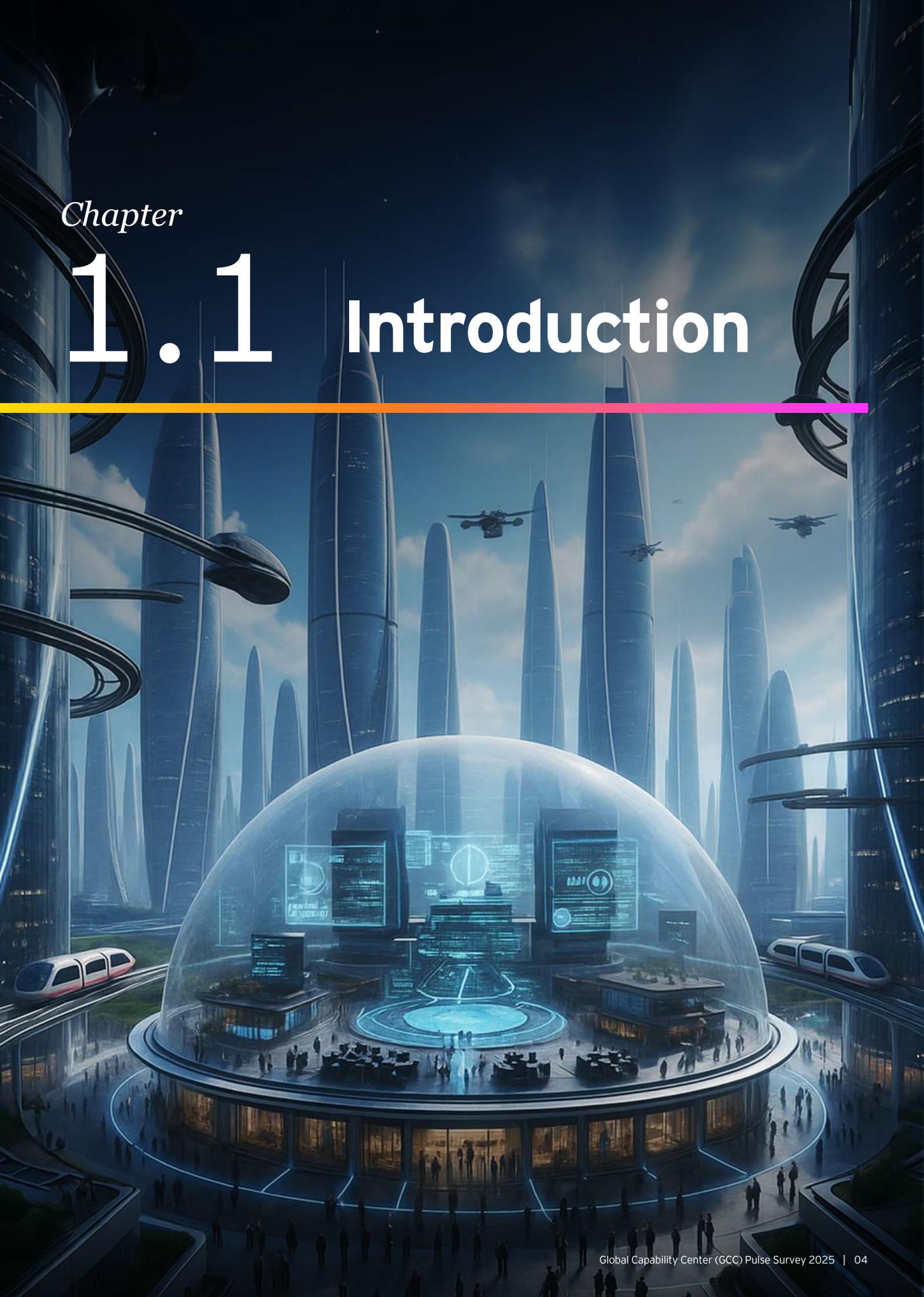


2024 edition



Chapter

1.1 Introduction



For over **19 years**, EY has partnered with GCCs in India – from set-up and scale to strategic expansion. Today, we help them evolve into AI-led Centers of Excellence, driving innovation, intelligence and enterprise value.

Introduction

The EY GCC Pulse Survey 2025 continues our commitment to capturing the evolving priorities of India's GCCs. This year's edition delves deeper into how GCCs are redefining their strategic roles – driving innovation, harnessing AI and digital technologies, optimizing operations and building future-ready organizations.

Through insights from leaders across industries, the report highlights emerging trends in strategy, operating models, talent, technology and delivery excellence, thus serving as a practical compass for GCCs looking to scale impact and strengthen their global relevance.

Focus areas for 2025:

- 1 **GCC strategy and operating model**
- 2 **AI, data and digital technology**
- 3 **People and organizational effectiveness**
- 4 **Risk and cyber security**

Spotlight

EY Capability Center-as-a-Service (CaaS) is a one-stop solution to address your GCC needs starting from setup to scale to transformation.

Chapter

1.2 Approach



Scope and coverage

The ***GCC Pulse Survey 2025*** captures emerging priorities and trends across diverse sectors and regions in India.

The research involved a two-step process: an online survey followed by data analysis with EY experts - conducted between August and October 2025

This year's edition focuses on the next phase of GCC transformation: from efficiency-driven centers to hubs of innovation, digital acceleration and enterprise leadership. The survey captures insights from GCC leaders across industries, assessing priorities for the next 12 months across four key pillars shaping the sector's trajectory:



Strategy and operating model

Examines GCCs' key priorities and its evolving mandates, from driving cost efficiency to leading enterprise-wide transformation and innovation agendas. It also assesses budget allocations, decision-making influence and regulatory expectations that shape growth and expansion.



AI, data and digital technology

Explores how GCCs are investing in technologies such as GenAI, Agentic AI, data analytics and digital twins. The section highlights how centers are enabling global digital transformation, partnering with ecosystems and nurturing an internal culture of innovation and experimentation.



People and organizational effectiveness

Focuses on how GCCs are addressing scalability, enhancing the employee value proposition and developing leadership and digital skills. It also examines evolving work models, attrition patterns and retention strategies in a competitive talent market.



Risk and cybersecurity

Evaluates emerging business risks including talent reskilling, operational costs and data protection challenges while assessing the maturity of cybersecurity practices and the integration of security within the GCC operating model.

About the survey respondents

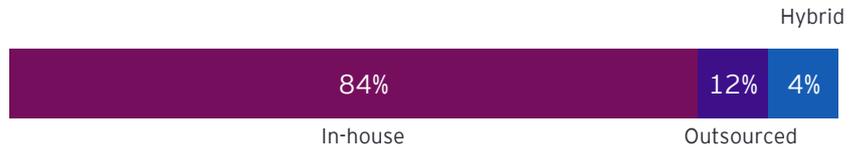
The 2025 survey includes responses from GCCs spanning multiple industries, operating out of India and key international hubs including Mexico, Poland, Malaysia, Romania and the Philippines, among others. Participating centers report an average headcount of approximately **800 employees**.

Type of GCCs

Spotlight

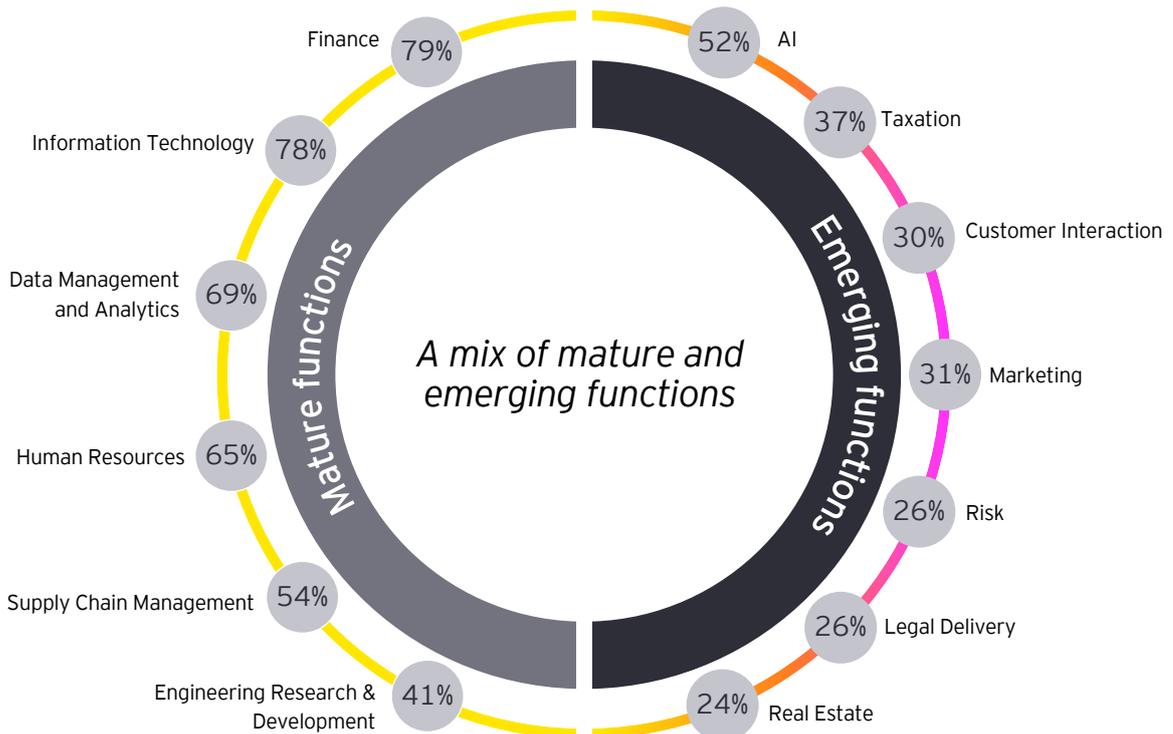
50% of GCCs support English as their core language, with growing multilingual capabilities in Spanish, French and German.

The 2025 survey indicates that while in-house operations hold steady at **84%**, there is a notable uptick in outsourcing, rising from **8%** in 2024 to **12%** this year. This shift suggests a growing trend of strategic outsourcing for transactional or non-core activities, allowing GCCs to focus their internal talent on high-value work such as digital transformation, innovation and enterprise strategy.

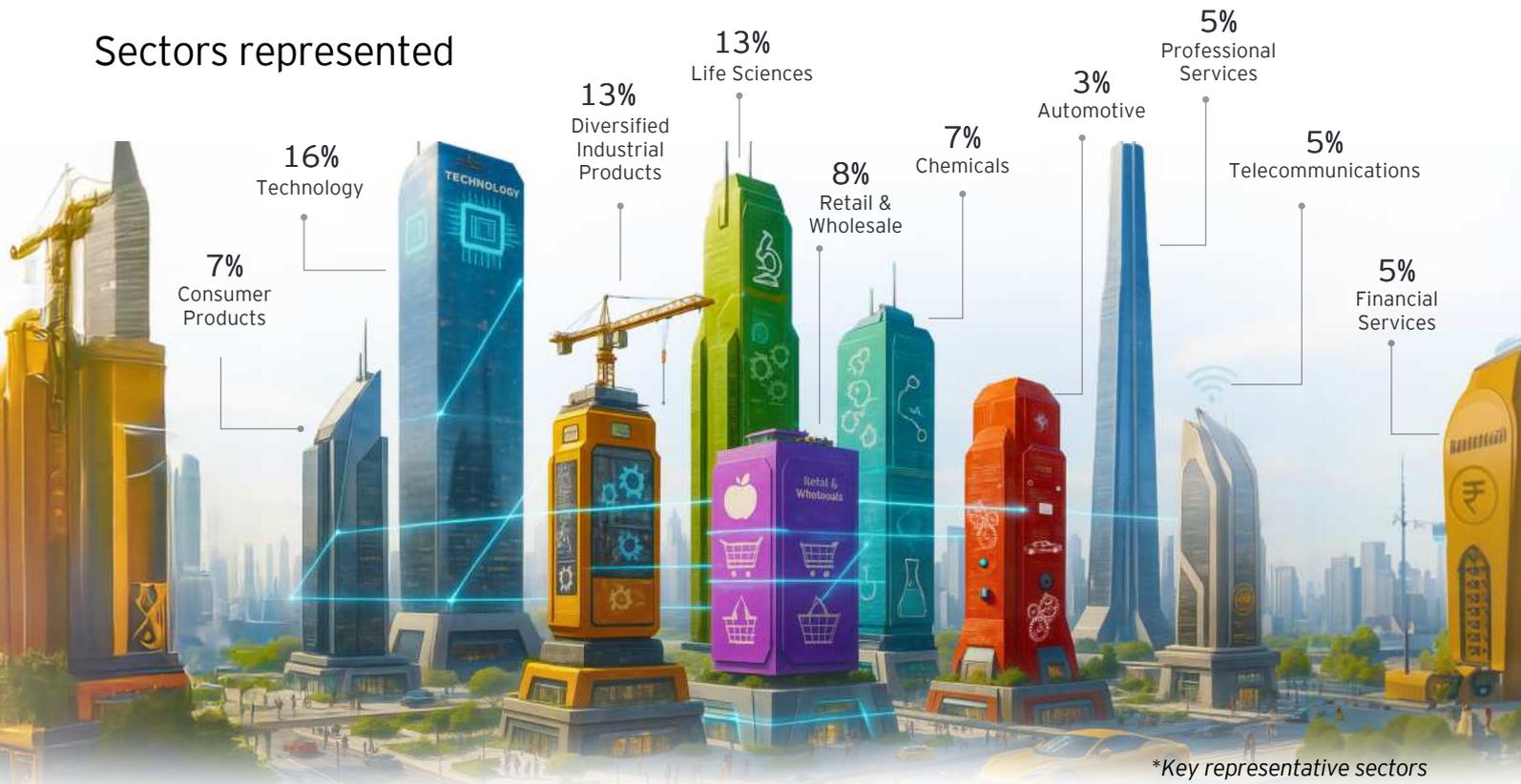


Functions supported

GCCs are evolving into multi-functional hubs. While IT, finance and HR remain strong, growing focus on AI, data and R&D highlights their shift toward innovation-led and knowledge-intensive work.

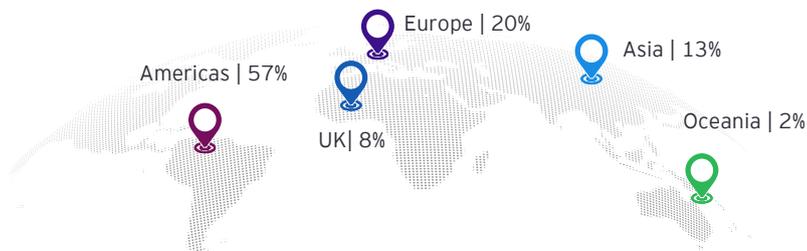


Sectors represented



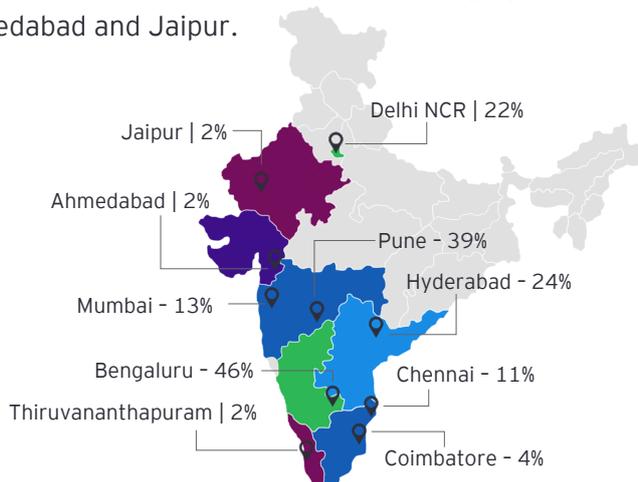
GCC HQ location

A majority of GCCs in India are set up by companies from the Americas, followed by Europe. The trend is driven by these regions' focus on innovation, which they believe can be accelerated from India through access to its vast and growing digital talent pool.



GCC locations in India

The majority of survey participants are based in Bengaluru, followed by Pune and Hyderabad, with growing representation from Delhi NCR, Mumbai, Chennai, and emerging tier-2 hubs such as Ahmedabad and Jaipur.



Chapter

2.0

GCC strategy and operating model



Finance

IT

HR

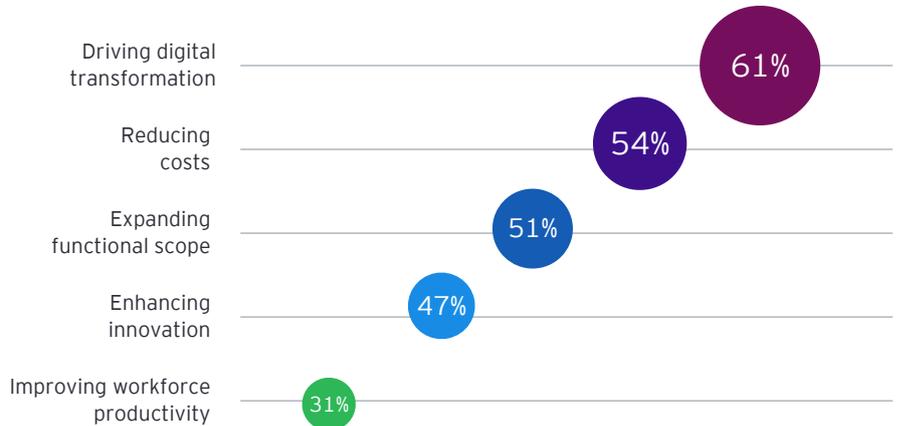
Marketing

**GCC
VISION**

Key priorities

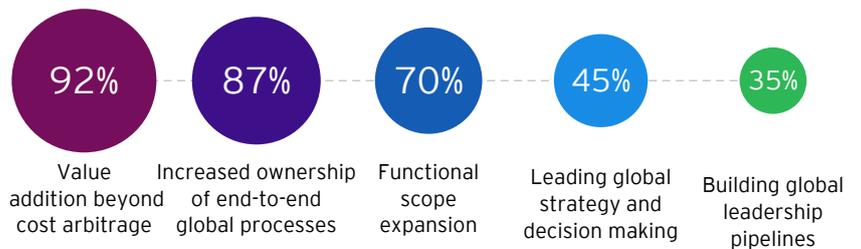
Functional expansion slips from a peak of **86%** in 2023 to **51%** in 2025, signaling a strategic pivot.

Digital transformation, fueled by AI adoption and end-to-end IP ownership, is the operational accelerator for competitive advantage, demanding tech-led growth and aggressive AI upskilling. The GCC's mandate is now moving towards innovation arbitrage, than just cost savings.



Strategic mandate

The GCC is now the enterprise's value orchestrator. GCCs are shifting from cost arbitrage to strategic value, with most driving end-to-end global processes. We also see them increasingly influencing key business decisions, positioning themselves as integral partners in shaping enterprise growth and innovation.

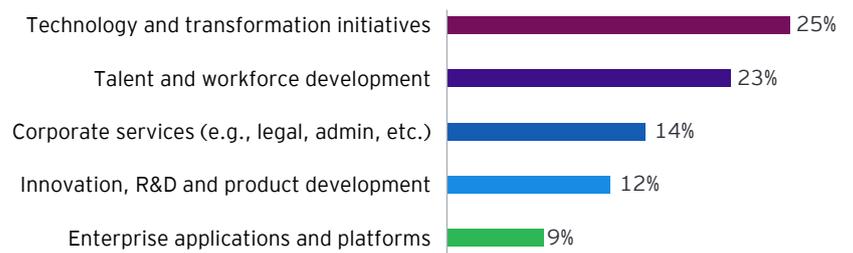


Budget allocation

GCCs are doubling down on technology, transformation and talent, driving digital capabilities and workforce readiness, while innovation and corporate services signal their evolution beyond traditional operations.



Connect with Kunal.Ghatak@in.ey.com or Sunil.Venkatesh@in.ey.com to learn more about GCC set-ups and expansions.



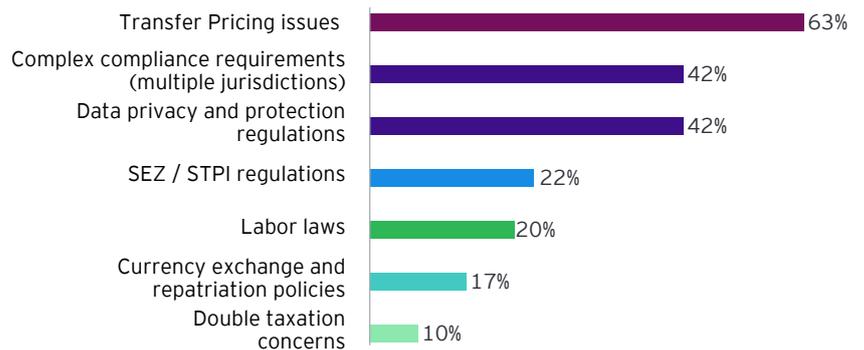
Nature of influence

GCCs are becoming key collaborators in global decision-making, with over half sharing accountability and a quarter providing strategic consultation, cementing their role as influential enterprise partners.



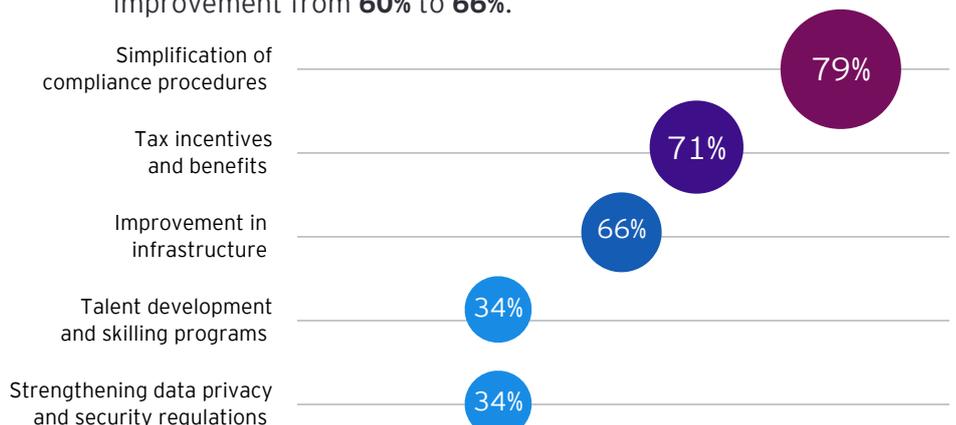
Regulatory and tax-related challenges

In 2025, transfer pricing remains the top regulatory challenge for GCCs, unchanged from 2024, but compliance complexity (42% vs. 32%) and data privacy concerns (42% vs. 32%) have risen, reflecting the growing need for stronger governance and risk management frameworks.



Expectations from the government

For GCCs, simplified compliance, tax incentives and better infrastructure remain critical to scaling efficiently and driving sustainable growth in India's evolving business landscape. From 2024 to 2025, expectations from the government have risen: demand for simplified compliance grew from 75% to 79%, for tax incentives from 65% to 71% and for infrastructure for improvement from 60% to 66%.



Connect with Ritika.Gupta@in.ey.com for any tax related query.

Chapter

3.0

AI, data and digital technology



Technology investment allocation

Spotlight

According to the global EY Agentic AI Workplace Survey, **84%** of employees are ready to embrace agentic artificial intelligence (AI) in their role.

GCCs are rapidly evolving from experimentation to enterprise-scale adoption of AI. GenAI leads with **83%** already investing, but the real story is the rise of Agentic AI – the next frontier of intelligent automation – with **58%** currently investing and another **29%** planning to within a year.

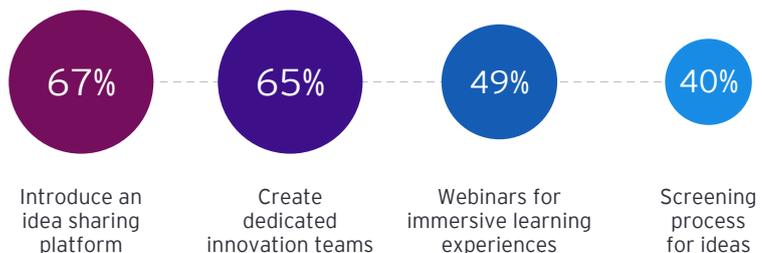
| | Currently investing | Plan to invest in one year |
|-----------------------------|---------------------|----------------------------|
| GenAI | 83% | 2% |
| Cybersecurity enhancements | 83% | 5% |
| Agentic AI | 58% | 29% |
| Digital Twins | 55% | 10% |
| Process mining tools | 53% | 16% |
| Decision intelligence tools | 34% | 9% |
| AR / VR | 21% | 3% |

Innovation and research

GCCs are moving beyond execution to owning innovation. With two-thirds creating dedicated innovation teams and incubation platforms, the focus is on turning in-house creativity into tangible business impact. The next wave of differentiation is expected to come from structured innovation pipelines, where ideas are not just generated, but systematically nurtured, tested and scaled globally.



Connect with Salil.Shekharan@in.ey.com to learn more about Agentic AI use cases.

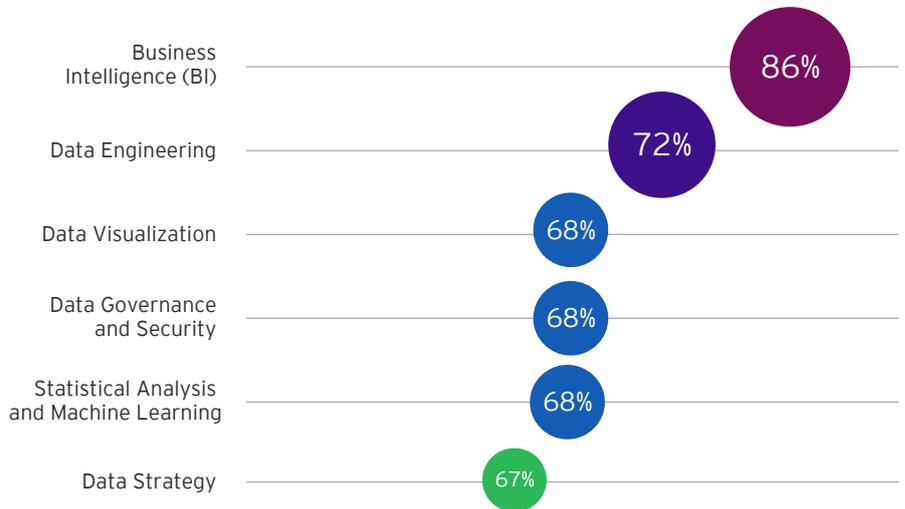


Data and analytics skills



Connect with Ajay.Kamat@in.ey.com or Jayaprakash.b@in.ey.com to know more on EY digital tools and data strategies

GCCs have progressed from exploring data to fully operationalizing it. Business Intelligence (rising from **80%** in 2024 to **86%** in 2025) and Data Strategy (from **51%** in 2024 to **67%** in 2025) now underpin digital decision-making, establishing data as a core enterprise asset.



GenAI adoption

The sharp rise in upskilling reflects a shift toward building in-house GenAI capability to drive efficiency, innovation and long-term competitive advantage.

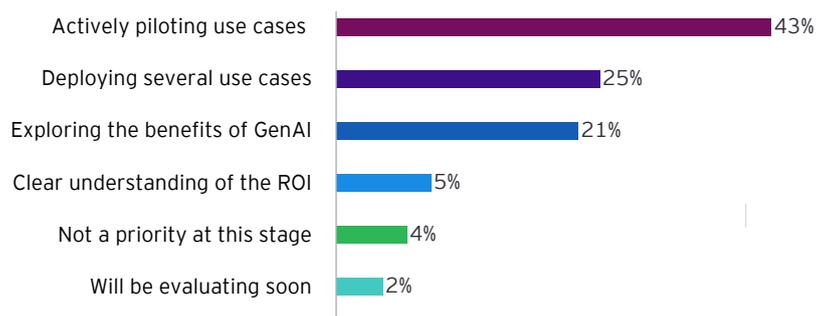


Approach to GenAI



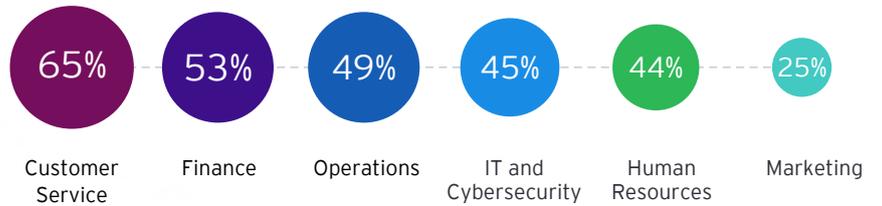
Connect with bvijay.shankar@in.ey.com to learn more about AI strategies.

GCCs have moved from curiosity to commercialization in their GenAI journey. In 2025, more centers are piloting (**43%** vs. **37%** in 2024) and deploying (**25%** vs. **21%** in 2024) GenAI use cases, signaling a clear shift from exploration to execution and measurable business impact.



Areas of GenAI application

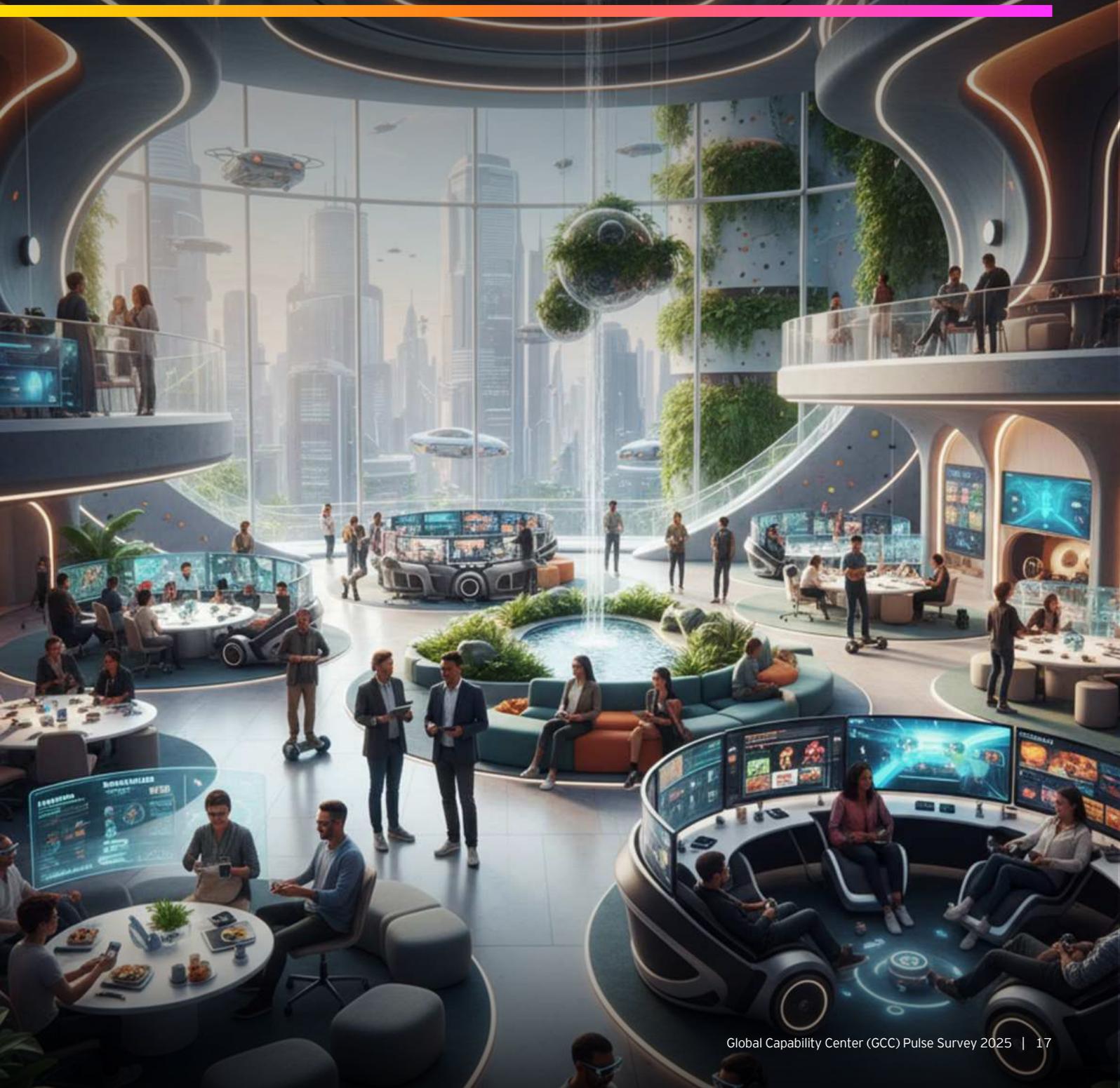
GCCs are applying GenAI where it matters most - enhancing customer experience. They are using chatbots, personalization and sentiment analysis to deliver faster, smarter and more human-like interactions.



Chapter

4.0

People and organizational effectiveness

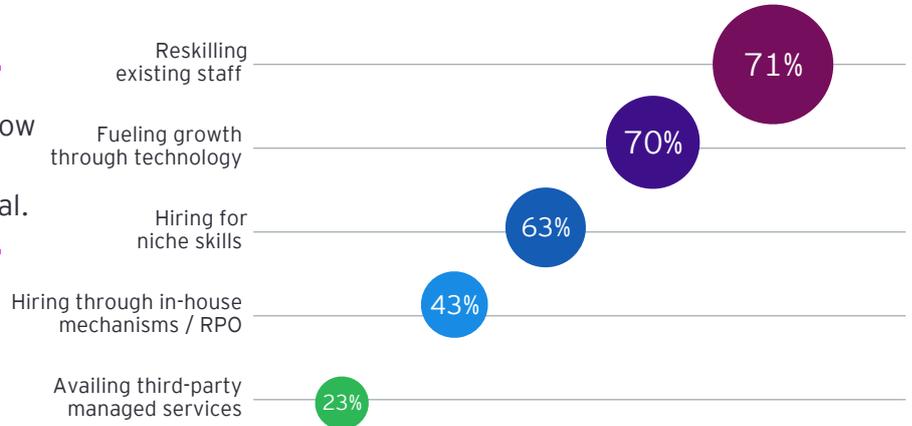


Scalability in operations

Spotlight

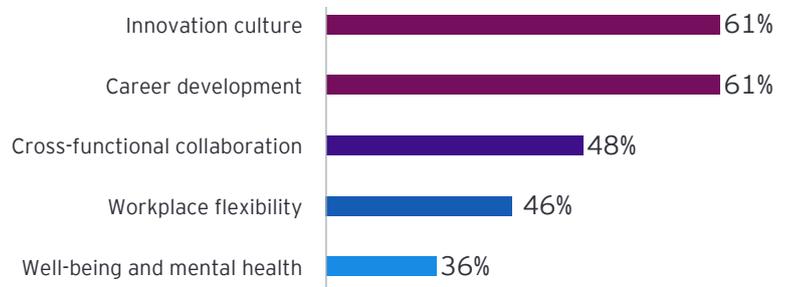
Hybrid is here to stay: **95%** of GCCs now operate in a hybrid model, redefining flexibility as the new normal.

GCCs are scaling smarter, not larger. Reskilling and tech-led growth now define their scalability playbook, supported by a stronger push for niche skill hiring.



Evolving Employee Value Proposition (EVP) priorities

Innovation culture and career development lead GCCs' EVP as centers race to retain high-demand digital talent. Employees now seek meaningful, innovation-driven work and not just pay, pushing GCCs to invest in structured learning paths, rotational projects and clear career growth tied to innovation outcomes.



Retention strategies

Spotlight

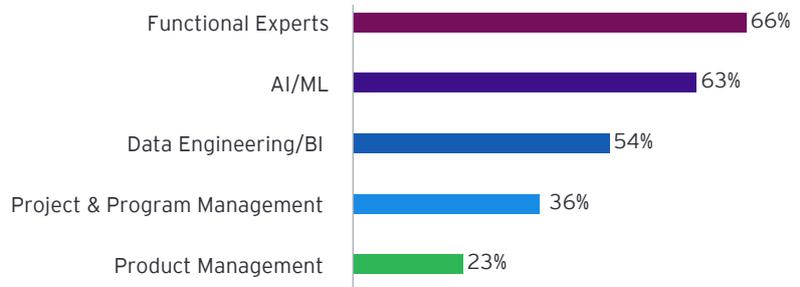
Attrition rates continue to decline, from **13%** in 2023 to **11%** in 2024 and now down to **9%** in 2025, reflecting stronger retention strategies across GCCs.

The steady decline in attrition rates showcases a shift from pay-based retention to purpose-led engagement, as GCCs focus on upskilling, flexibility and leadership access to build lasting loyalty.



Skills in focus

GCCs are prioritizing domain depth knowledge, closely followed by AI/ML and data engineering, signaling a shift toward tech-enabled business specialization over generic management skills.

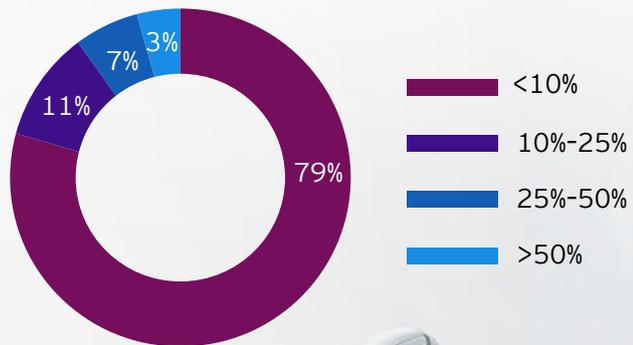


Leadership roles based in India

Despite growing maturity, most GCCs still have limited leadership presence in India with nearly **80%** reporting less than 10% of leadership roles based locally, underscoring the need to accelerate leadership localization for greater strategic influence.

How EY can help

Contact alpana.priyabhashini@in.ey.com to evaluate your GCC's employee value proposition.





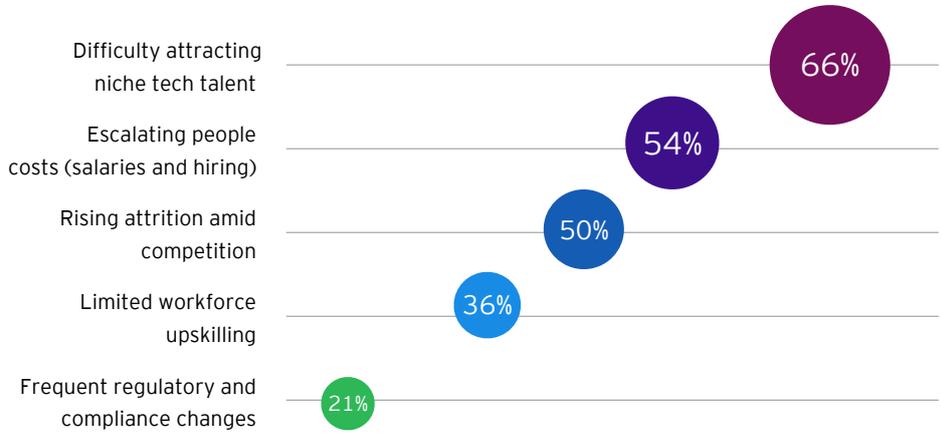
Chapter

5.0

Risk and cybersecurity

Risks to business

Workforce-related risks dominate the GCC agenda, driven by competition for niche digital talent, rising people costs and retention challenges.



Cyber maturity

Most GCCs operate at a moderate level of cybersecurity maturity, with only **7%** having a fully embedded Center of Excellence, signaling room to strengthen governance, automation and proactive defense.

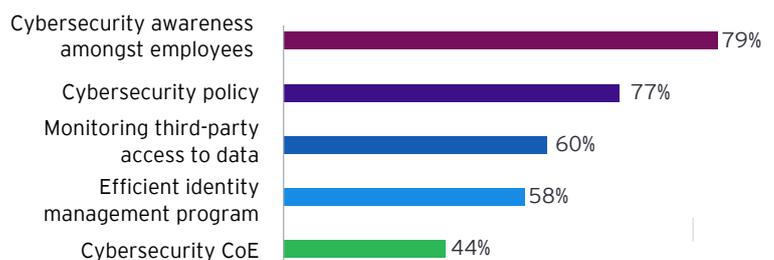


Cybersecurity best practices

While employee awareness and cybersecurity policies remain strong, increased monitoring of third-party access (**44%** in 2024 vs. **60%** in 2025) highlights GCCs' shift toward zero-trust framework, continuous threat monitoring and stronger identity and access management to proactively manage external risks.



Reach out to Tiffany.Isaac@in.ey.com to know more about cybersecurity trends and business risks.



The **EY GCC Pulse Survey 2025** marks a pivotal shift for India's Global Capability Centers. AI has moved from experimentation to enterprise scale, redefining operating models and transforming GCCs into intelligent value creators.

With GenAI adoption and rising investment in Agentic AI, GCCs are poised to evolve into autonomous ecosystems where intelligent agents drive decisions, innovation and operational agility. This transformation will redefine how work gets done, demanding deeper collaboration between technology and human intelligence – with talent already at the forefront, adapting to new roles shaped by AI-driven ways of working.

The next phase of GCC evolution will hinge on how effectively centers harness AI to reimagine processes, empower talent and influence enterprise strategy. The question is: how far, and how fast, will GCCs go in shaping this AI-driven future?



Acknowledgements

Working group



Sunil Venkatesh

Partner, Technology Consulting,
EY India



Sayan Banerjee

Senior Manager,
Technology Consulting, EY India



Shalini Lakhina

Assistant Director,
Models, Metrics & Methods
Process CoE, EY



Akanksh Sarji

Supervising Associate,
Models, Metrics & Methods
Process CoE, EY



Aman Manocha

Senior Associate,
Models, Metrics & Methods
Process CoE, EY



Rajagopal Selvarasu

Senior Consultant,
Technology Consulting, EY India

EY GCC Core Team



Arindam Sen
Partner and GCC Sector Lead -
Technology, Media &
Entertainment and
Telecommunications, EY India



Ajay S Kamat
Partner,
Technology Consulting,
EY India



Ajay Sirikonda
Partner - Financial Services
Risk Consulting,
EY India



Alpana Dutta
Partner,
People Consulting,
EY India



Anand Mihir
Partner Leader - Financial
Services Risk Consulting,
EY India



**Balasubramanian
Manikandan**
Partner,
Business Consulting,
EY India



Kunal Ghatak
Partner,
Business Consulting,
EY India



Manoj Marwah
Partner,
FS GCC Consulting Lead,
EY India



Radhika Saigal
Partner,
Technology Consulting -
Financial Services, EY India



Rashmi P Kumat
Partner,
Technology Consulting,
EY India



**Ritika Loganey
Gupta**
Tax Partner,
EY India



Shiv Narain
Partner,
Risk Consulting,
EY India



Subir Mehra
Partner and GCC Sector Lead -
Financial Services,
EY India



Sunil Venkatesh
Partner,
Technology Consulting,
EY India



Tiffy Isaac
Partner,
Risk Consulting,
EY India



Vijay S Bhaskaran
Partner,
Business Consulting,
EY India

Our Offices

Ahmedabad

22nd Floor, B Wing, Privilon
Ambli BRT Road, Behind Iskcon Temple
Off SG Highway
Ahmedabad - 380 059
Tel: + 91 79 6608 3800

8th Floor, Building No. 14A
Block 14, Zone 1
Brigade International Financial Centre
GIFT City SEZ
Gandhinagar - 382355, Gujarat
Tel +91 79 6608 3800

Bengaluru

12th & 13th Floor
"UB City", Canberra Block
No.24 Vittal Mallya Road,
Bengaluru - 560 001
Tel: + 91 80 6727 5000

Ground & 1st Floor
11, 'A' wing
Divyasree Chambers
Langford Town,
Bengaluru - 560 025
Tel: + 91 80 6727 5000

3rd & 4th Floor
MARKSQUARE
#61, St. Mark's Road
Shantala Nagar,
Bengaluru - 560 001
Tel: + 91 80 6727 5000

1st & 8th Floor, Tower A
Prestige Shantiniketan
Mahadevapura Post
Whitefield,
Bengaluru - 560 048
Tel: + 91 80 6727 5000

Bhubaneswar

8th Floor, O-Hub, Tower A
Chandaka SEZ, Bhubaneswar,
Odisha - 751024
Tel: + 91 674 274 4490

Chandigarh

Elante offices, Unit No. B-613 & 614
6th Floor, Plot No- 178-178A
Industrial & Business Park, Phase-I
Chandigarh - 160 002
Tel: + 91 172 6717800

6th & 7th Floor, A Block,
Tidel Park, No.4, Rajiv Gandhi Salai
Taramani, Chennai - 600 113
Tel: + 91 44 6654 8100

Delhi NCR

Aikyam
Ground Floor
67, Institutional Area
Sector 44w, Gurugram - 122 003
Haryana
Tel: + 91 124 443 4000

3rd & 6th Floor, Worldmark-1
IGI Airport Hospitality District
Aerocity, New Delhi - 110 037
Tel: + 91 11 4731 8000

Hyderabad

THE SKYVIEW 10
18th Floor, "SOUTH LOBBY"
Survey No 83/1, Raidurgam
Hyderabad - 500 032
Tel: + 91 40 6736 2000

Jaipur

9th floor, Jewel of India
Horizon Tower, JLN Marg
Opp Jaipur Stock Exchange
Jaipur, Rajasthan - 302018

Kochi

9th Floor, ABAD Nucleus
NH-49, Maradu PO
Kochi - 682 304
Tel: + 91 484 433 4000

Kolkata

22 Camac Street
3rd Floor, Block 'C'
Kolkata - 700 016
Tel: +91 33 6615 3400

6th floor, Sector V,
Building Omega, Bengal Intelligent
Park, Salt Lake Electronics Complex,
Bidhan Nagar, Kolkata - 700 091
Tel: +91 33 6615 3400

14th Floor, The Ruby
29 Senapati Bapat Marg
Dadar (W), Mumbai - 400 028
Tel: + 91 22 6192 0000

5th Floor, Block B-2
Nirlon Knowledge Park
Off. Western Express
Highway, Goregaon (E),
Mumbai - 400 063
Tel: + 91 22 6192 0000

3rd Floor, Unit No.301
Building No.1, Mindspace-Gigaplex
IT Park, MIDC, Plot No. IT-5
Airoli Knowledge Park
Airoli West, Navi Mumbai - 400 708
Tel: + 91 22 6192 0003

Altimus, 18th Floor
Pandurang Budhkar Marg
Worli, Mumbai - 400 018
Tel: +91 22 6192 0503

Pune

C-401, 4th Floor
Panchshil Tech Park, Yerwada
(Near Don Bosco School)
Pune - 411 006
Tel: + 91 20 4912 6000

10th Floor, Smartworks
M-Agile, Pan Card Club Road
Baner, Pune - 411 045
Tel: + 91 20 4912 6800

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