

The India Capability Centres employee value proposition pulse

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Preface

India's Global Capability Centers (GCCs) are at an inflection point—shifting from cost-efficient delivery hubs to strategic engines for innovation, product engineering, and enterprise transformation. As talent evaluates GCCs as career accelerators, the Employee Value Proposition (EVP) cannot be a generic template. Teams now expect global-grade work, end-to-end ownership, visible influence, and fast growth—making the proposition more specific, differentiated, aligning to GCC maturity and capabilities.

For established GCCs, scale and operational excellence are no longer enough. As mandates move up the value chain, the EVP must clearly signal impact, trajectory, and global connectivity - leveraging the existing “trust equation”.

Newer GCCs, by contrast, offer the “startup vibe” paying a risk premium – a combination of early responsibility and “founding member effect” that appeals strongly to the modern workforce. Winning EVPs prove long-term intent through leadership access, autonomy, and risk-mitigating benefits. Across both archetypes, one expectation is universal: borderless pathways. Talent increasingly prioritizes the ability to work across geographies, collaborate with enterprise leaders, and move across domains.

The evolving talent equation:

- 1. Shifting focus from “Why Join” to “Why You Matter”**
GCC EVPs must spotlight enterprise impact, ownership, and visible outcomes—not just roles and perks.
- 2. One proposition doesn't fit all - maturity-based differentiation sustains**
What attracts builders in new GCCs is not what retains transformers in scaled, established centers.
- 3. Proof beats promise—signal intent through operating model**
Autonomy, decision rights, leadership access, and connect to business impact make the proposition credible and sticky.

This report distills the evolving GCC talent equation as India's GCCs continue their rise from operational units to enterprise enablers.

The employee value proposition (EVP) as a strategic asset: innovation, environment, and capability signals

Functional focus as an anchor for talent priorities



Tech capability: Functions with higher innovation and process orientation (IT, engineering, analytics) prioritize talent growth, skill development and creativity. Career progression, innovative work and work environment are consistently prioritized, reflecting the tech sector's need for growth, creativity and a strong environment



Business service: Purpose and career progression gain importance when the capability touches HR or broader organization reputation and employee engagement domains. This shows that employee intent/mission, development and environment are central to HR-driven GCCs



E&RD capability: There is a strong emphasis on work environment, innovative work and organizational brand, which is likely to attract top engineering talent

Innovative work design and a supportive work environment are top differentiator employee priorities in GCCs, driving sustained organizational value through strategic investment.



Innovative work emerges serves as a key talent magnet and enabler of organizational adaptability and competitiveness. This has been driven by newer and nano GCCs emerging as transformation hubs as against service providers and creating a 'founding member' effect



The right and a meaningful work environment, is a core promise differentiator across sectors and GCC maturity stages. This reflects a shift in GCC focus from purely operational efficiency to creating a vibrant, supportive culture and high experience workplace that creates a 'trust equation'

Industry archetypes shape talent positioning



Life Sciences, Healthcare and Pharmaceuticals

Innovation and a strong organizational purpose/brand are focal points, reflecting the sector's emphasis on meaningful work and impact.

As **life sciences** organizations mature, organizational brand and purpose rise in the EVP priorities, while early maturity stages focus more on innovation and internal development.



Energy, Utilities and Oil and Gas

These organizations often focus on innovation and brand reputation, likely due to industry transformation and the need for a compelling mission. Newer and younger organizations emphasize innovation and purpose, while mature ones begin to value culture and career growth.



Technology or Engineering

There is a clear focus on growth opportunities, challenging and creative work, and a collaborative culture—mirroring the nature of the tech/electronics industry, which attracts talent motivated by innovation and advancement.

In technology, innovative work remains central regardless of age or size, but as organizations mature and scale, career progression and compensation gain prominence alongside workplace culture.



Consumer Goods and Retail

Organizations in this sector heavily emphasize rewards and a positive work environment to attract and retain talent. As organizations grow older and larger, focus shifts more toward workplace culture, compensation and career progression, while early-stage/small organizations emphasize innovation and brand.

Focusing on what matters: prioritization of proposition levers by sector

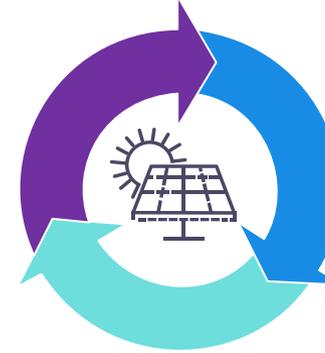
Overall preference hierarchy



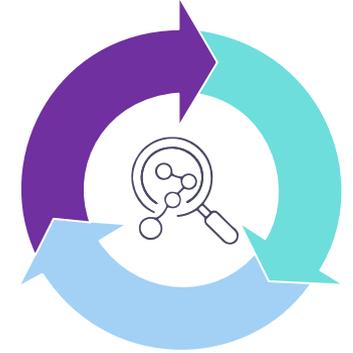
Consumer Goods & Retail



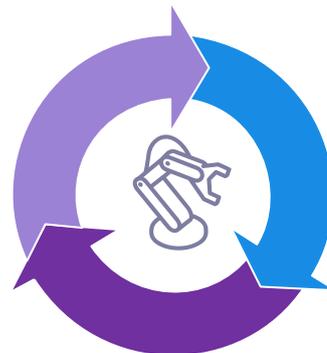
Energy, Utility & Oil & Gas



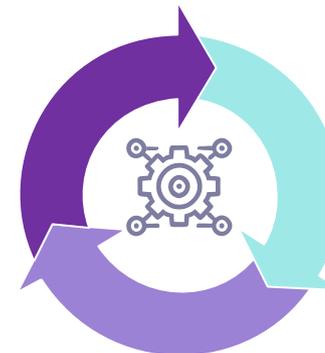
Life Sciences, Healthcare & Pharma



Manufacturing, Automotive & Industrial Goods



ER&D Tech



BFSI & FinTech



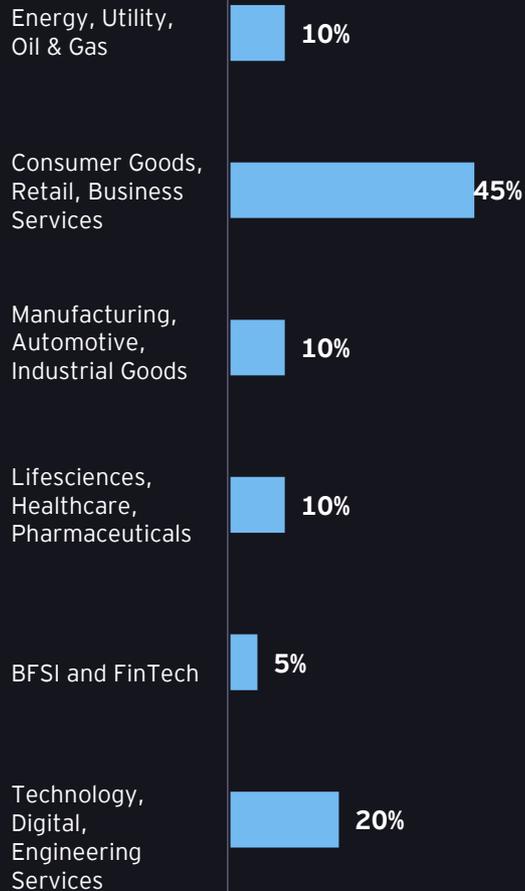
Participant

Highlights



Respondents' profile

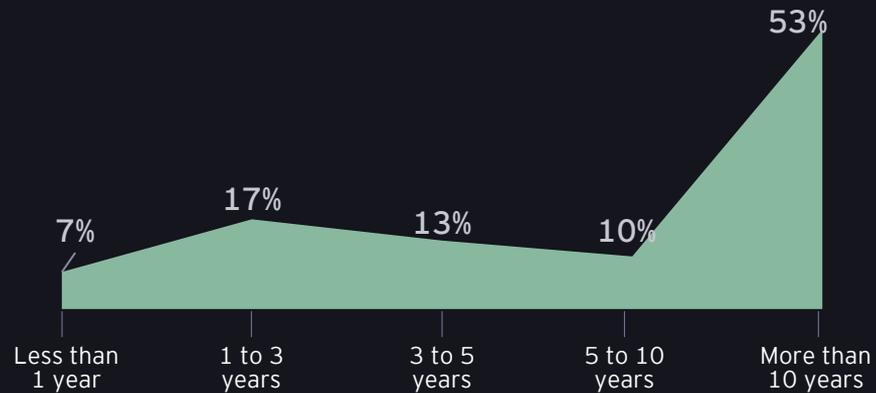
Industries covered



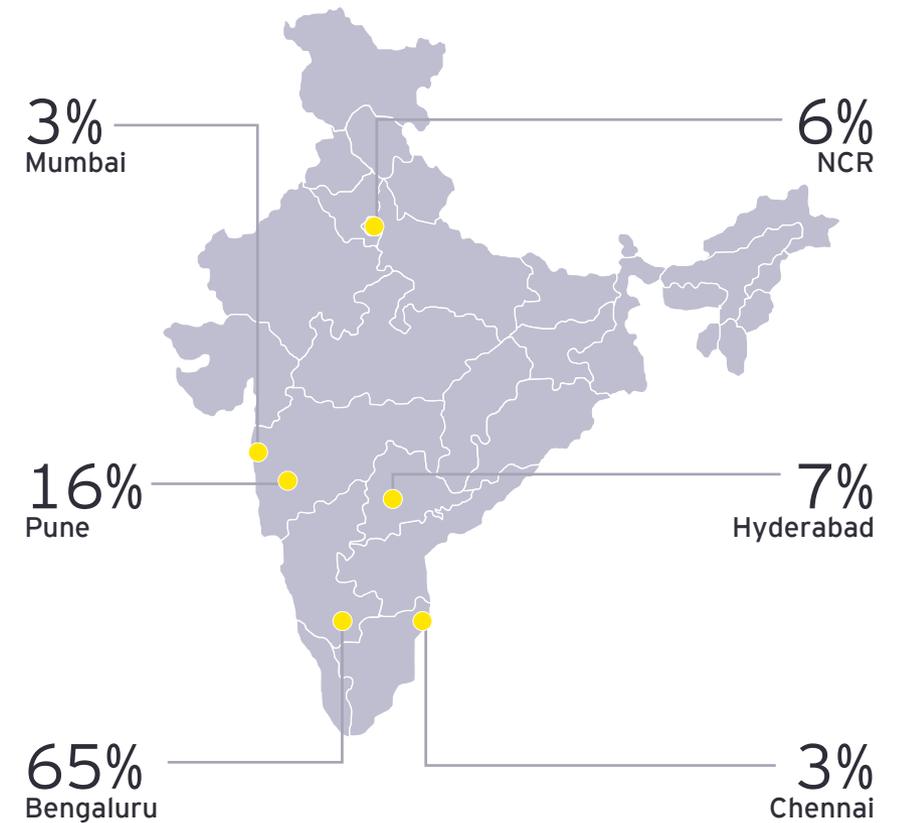
Size of GCCs surveyed



Tenure of GCCs surveyed



Geographic region of respondents



GCC strategic priorities shift from cost to innovation across industries

While cost efficiency remains foundational, leading GCCs are pivoting toward talent access and innovation as their primary differentiators.



Tech and FinTech lead in innovation (30%-35% focus): Driving digital ambition and enterprise cloud adoption through deep technical talent pools



Life Sciences and Healthcare prioritize talent access (25%-30% focus): Competing for specialized R&D capabilities and regulatory proficiency to accelerate development

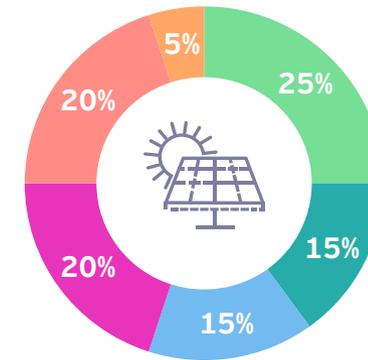


Manufacturing and Energy emphasize operational transformation (25%-35% focus): Leveraging Industry 4.0, IoT and digital twins to modernize legacy infrastructure

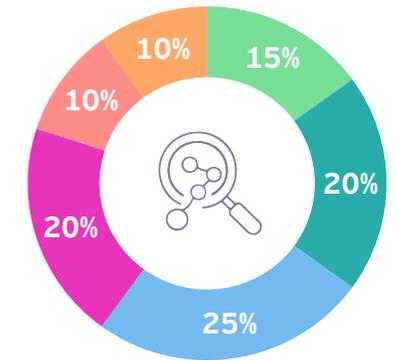
Consumer goods & retail



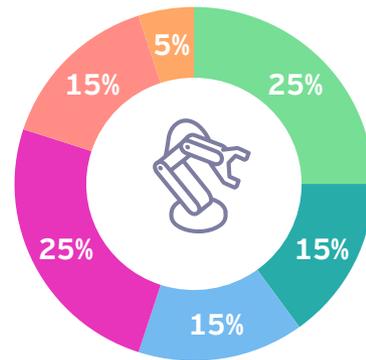
Energy, utility & gas



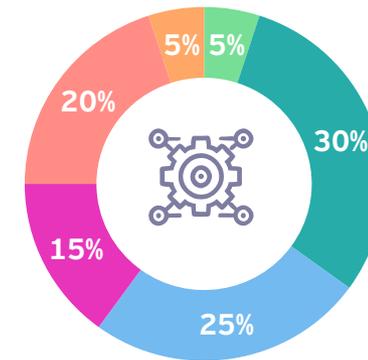
Life science, pharma



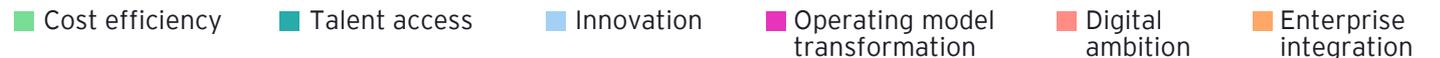
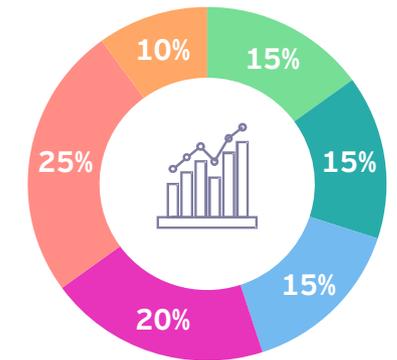
Manufacturing, automotive



ER&D, tech



BFSI, & fintech

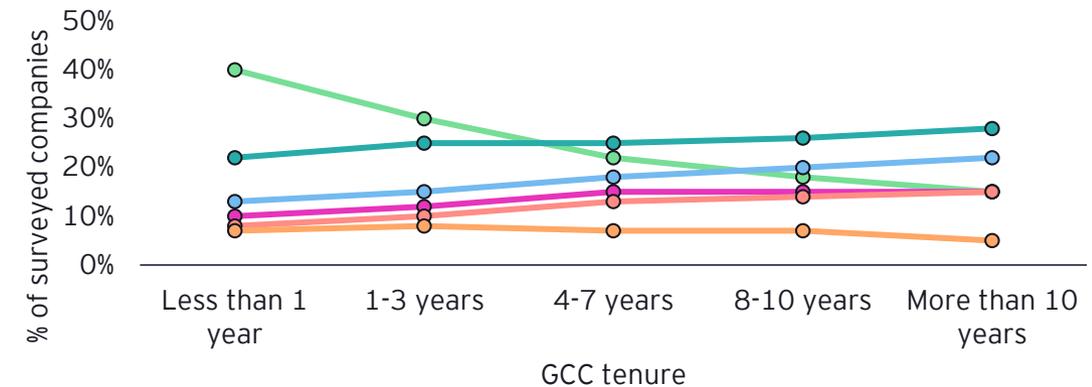


GCC's repositioning evolves with tenure and scale

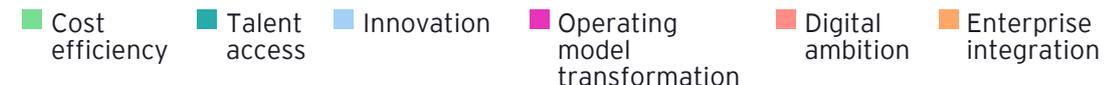
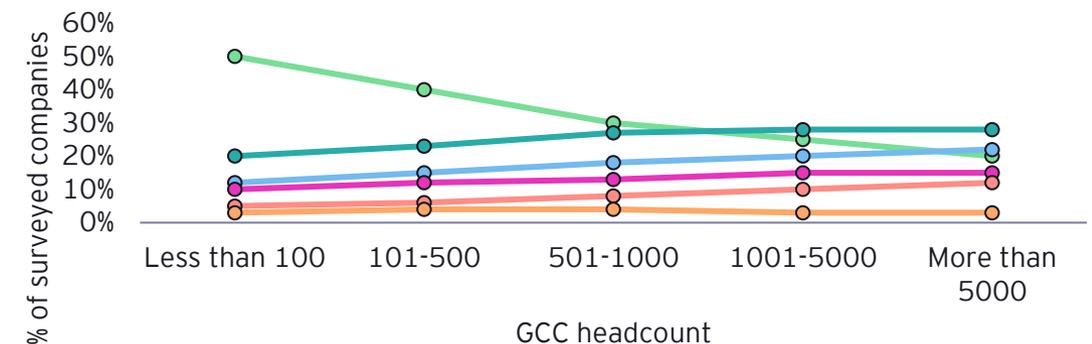
Key highlights

- **From cost center to capability hub**
 - Early GCCs are built on labor arbitrage
 - With scale, focus shifts to value creation, innovation, and enterprise impact
- **Talent access remains the enduring mandate**
 - Hiring evolves from scale to scarce, high-end skills driven by the demand for in AI, data engineering, cybersecurity and R&D
 - Capability depth overtakes cost as the primary differentiator
- **Role shift from execution to owning end to end product lifecycle**
 - As GCCs scale, innovation and operating model transformation gain prominence
 - Newer GCCs serve as AI, automation, and engineering centers of excellence
- **GCC accelerating digital ambition**
 - Actively shaping digital transformation roadmaps and establishing labs and data ecosystems that drive enterprise reinvention
- **Enterprise integration remains underdeveloped**
 - Many GCCs remain operationally strong but strategically under-embedded
- **External forces accelerate the shift**
 - Geopolitics, talent scarcity and digital urgency push organizations beyond cost logic
 - In India, over half of GCC revenues already stem from analytics and product innovation, underscoring their role in enhancing competitiveness and growth

As GCCs mature, value overtakes cost



As scale evolves, GCCs emerge as reinvention engines instead of delivery units





Contributors



Priyanka Gupta

Partner/Principal
People Consulting,
Priyanka.Todi@in.ey.com



Akshey Bhanot

Manager
People Consulting,
Akshey.Bhanot1@in.ey.com



Adithya A Panambur

Manager
People Consulting,
Adithya.Panambur@in.ey.com



Esha Rudra

Senior
People Consulting,
Esha.Rudra@in.ey.com

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