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HORIZONS REPORT

Global Capability Centers (GCC) Services, 2026

Closing the gap between execution and enterprise impact

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Excerpt for EY

"GCCs are at an inflection point. Enterprises want them to move beyond execution and start driving real business value, but most provider engagements are still focused on operations.

Real change will happen when service providers step up from delivery partners to true enablers of outcomes, innovation, and scalable Services-as-Software™."

Achyuta Ghosh
Executive Research Leader,
HFS Research

"GCCs are undergoing an AI-driven transformation to enhance efficiency, reduce costs, and improve outcomes, in line with the headquarters' mandates. GCC leaders are gaining board access and the autonomy needed to lead AI initiatives. This includes integrating services into software to showcase tangible results at the enterprise level."

Srini Vaddepalli
Practice Leader,
HFS Research

"As GCCs mature, enterprises are shifting their focus from setup and scale to outcome-driven transformation, challenging providers to move beyond execution and embed AI and innovation into core operating models."

Mayank Madhur
Practice Leader,
HFS Research

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1 Introduction and research methodology

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Introduction

- The global push to drive efficiency, resilience, and innovation through distributed operating models continues to accelerate. Global Capability Centers (GCCs), once established primarily for cost arbitrage, are now evolving into strategic hubs for enterprises to access talent, scale digital capabilities, and drive innovation at speed.
- Enterprises are increasingly leveraging GCCs to move beyond labor arbitrage toward skills and innovation arbitrage, supported by deep talent pools, advanced technology ecosystems, and growing maturity in operating models. At the same time, rapid advancements in AI, automation, and cloud are reshaping how these centers are designed, operated, and integrated into the broader enterprise.
- As expectations rise, the role of service providers is also evolving. Providers are no longer limited to supporting setup and operations. They are increasingly expected to act as strategic partners, enabling transformation, talent development, and long-term value realization across the GCC lifecycle.
- The *HFS Horizons: GCC Services, 2026* report evaluates how effectively service providers are helping enterprises design, build, operate, and transform GCCs across the value chain. The study assesses provider capabilities across the dimensions of **why, what, how, and so what,** offering a comprehensive view of their ability to deliver execution excellence, drive transformation, and enable innovation-led growth.
- This report focuses on the supply side of the market, providing detailed profiles of service providers, including their Horizons positioning, strengths, and development opportunities. It examines GCC-specific capabilities across the value chain, excluding standalone horizontal IT, BPM, or engineering research and development (ER&D) services that are not directly tied to GCC-led transformation initiatives.

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Sources of data

This Horizons research report relies on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the service capabilities of participating organizations covered in our study. The sources are as follows:

Briefings and information gathering

HFS conducted 24 detailed briefings with GCC leadership from each vendor.

Each participant submitted a specific set of supporting information aligned with the assessment methodology.

Reference checks

We conducted reference checks with 19 active GCC clients and 21 active partners of the study participants via surveys and interviews.

HFS Pulse

Each year, HFS conducts multiple demand-side surveys, including detailed vendor rating questions. We leverage this data for this analysis.

Other data sources

Public information such as news releases and websites.

Ongoing interactions, briefings, virtual events, etc., with in-scope vendors and their clients and partners.

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The HFS GCC value chain

GCC services are specialized offerings that help establish, operate, optimize, and transform for enterprise GCCs. They cover the complete lifecycle of a GCC, from initial design and setup to ongoing enhancement, digital transformation, talent management, and process optimization.

Stage 0	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
Client identification and outreach	**GCC design and setup**	**Operational management and optimization**	**Digital transformation and innovation enablement**	**Talent management and workforce transformation**	**Strategic alignment and business integration**
Engagement happens across three levels: • Reactive (waiting for existing clients to approach) • Minimally proactive (limited pre-sales outreach with basic market engagement) • Highly proactive (market intelligence, dedicated pre-sales teams, events, pilots, and proofs-of-concept [PoCs])	• Business case for GCC establishment • Evaluating client readiness • Site location analysis • Configuring operating models (greenfield setups, build-operate-transfer [BOT], joint ventures) • Legal/tax compliance • Talent acquisition strategies and internal hiring • Strategic advisory	• Digital transformation and AI-led automation • Process excellence, Lean, and Six Sigma • Continuous performance benchmarking and analytics • Governance, compliance, and change management • Vendor and partner relationship management	• Building and scaling AI, machine learning [ML], and automation capabilities • Cybersecurity implementation and operational excellence • Centers of excellence (CoEs) for emerging technologies • Collaboration with broader business ecosystems for innovation	• Access to specialized talent pools locally • Designing and executing upskilling and continuous learning programs • Robust talent management, retention, and succession planning	• Aligning GCC objectives with broader enterprise strategy • Risk management and regulatory compliance • Facilitating integration between GCCs and global headquarters • Supporting unified IT, operations, and business goals

Enabling technologies

Cloud | AI/ML | GenAI | Agentic AI | Analytics | Automation | SaaS

Horizontal IT processes

Apps development and maintenance | Apps modernization | Cybersecurity | ERP | IT operations | AI and analytics

KPIs

ROI | Attrition rate | SLA compliance | Digital transformation index | Share of global operations/processes managed | Productivity

Implementation depth within each stage

Engagement across the value chain can happen in three different depths:
Stage 1 (basic): Foundational implementation | Stage 2 (intermediate): Enhanced capabilities and frameworks | Stage 3 (advanced): Comprehensive optimization and strategic integration

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Horizons assessment methodology for GCC services

The ***HFS Horizons: GCC Services, 2026*** report evaluates providers' capabilities across a range of dimensions to understand the **why, what, how, and so what** of service offerings.

Assessment dimension (weighting)

Distinguishing service provider characteristics	Value proposition: The why? (25%)	Execution and innovation capabilities: The what? (25%)	Go-to-market strategy: The how? (25%)	Market impact: The so what? (25%)
Horizon 3	• Horizon 2 + • Ability to drive the **OneEcosystem** approach by finding completely new sources of value through collaboration across multiple organizations with a common purpose	• Horizon 2 + • Strategy and execution capabilities at scale • Well-rounded capabilities across all value creation levers • A key player in forming leading ecosystems • An extensive list of industry-specific partnerships and tools	• Horizon 2 + • Driving co-creation with clients and ecosystem partners • Effectively envisioning outcomes and business assurance for transformation • Demonstrated credibility in leading multiple clients to production	• Horizon 2 + • Referenceable and satisfied clients driving new business models based on the partnership • Perceived as a strategic partner and thought leader
Horizon 2	• Horizon 1 + • Ability to drive the **OneOffice mindset** for enterprise-level real business outcomes and stakeholder experience	• Horizon 1+ • Ability to support clients throughout the end-to-end GCC value chain • Strong consulting skills and partnerships with firms playing across the GCC value chain • Actively contributing to top ecosystems • Industry-specific partnerships and tools	• Horizon 1+ • Proven and leading-edge proprietary assets, including different platforms • Capability to deliver transformation • A handful of clients in the production environment	• Horizon 1 + • Referenceable and satisfied clients for the ability to drive business transformation • Perceived as a strategic partner for setting up GCCs
Horizon 1	• Ability to drive **functional digital** transformation by driving cost reduction, speed, and efficiency	• Strong implementation capabilities • Deep engineering capabilities driving speed and efficiency • Offshore-focused with strong technical skills • Focused partnerships • Some industry-specific IP	• Robust fundamentals of enterprise transformation • Strong technology and capability focus • Clients mostly remain in pilot and proof-of-concept, with some in production	• Referenceable and satisfied clients for the ability to set up and operationalize GCCs • Perceived as a credible technology partner

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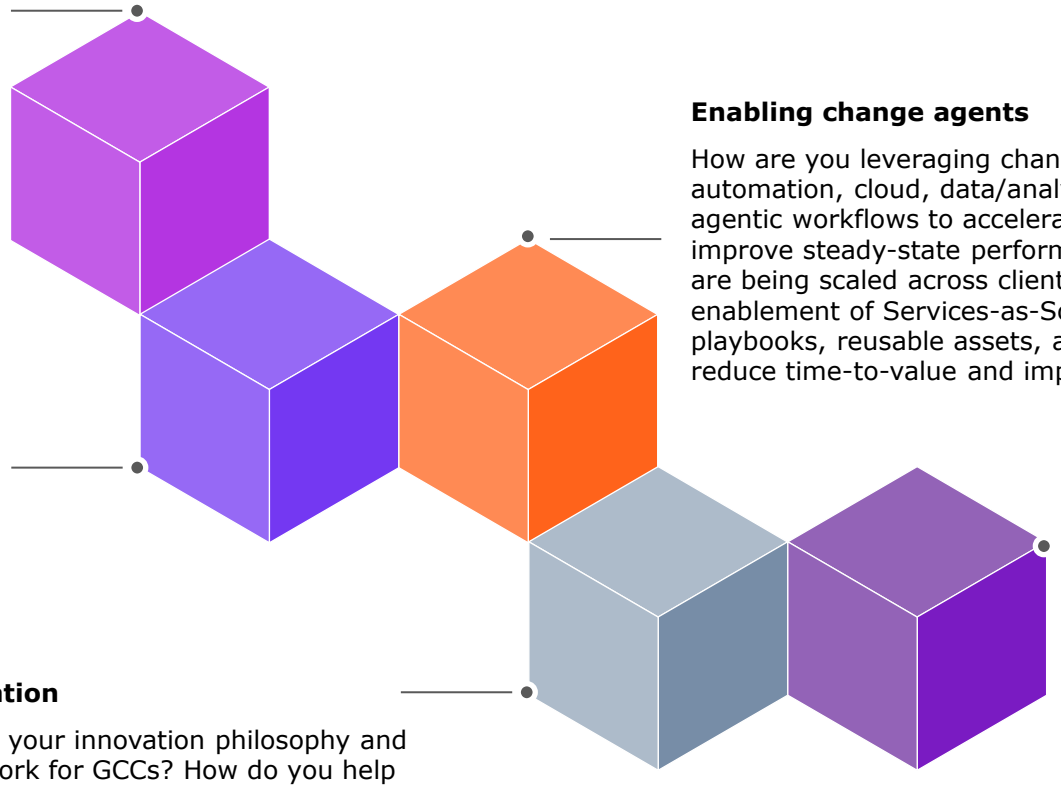
The study seeks to address multiple questions

Driving GCC outcomes across the value chain

How do you help enterprise clients set up, operate, optimize, and transform GCCs across geographies? How do you influence the core outcomes that enterprises expect from GCCs: cost-to-serve, speed/time-to-productivity, quality, risk and compliance, talent productivity, and value creation/innovation? Are these outcomes embedded in your KPIs and central to your delivery philosophy?

Real-world outcomes and value realization

What are the metrics that matter at each GCC stage (e.g., setup time, ramp-up speed, productivity, attrition, delivery quality, automation rate, cost reduction, governance maturity, innovation throughput)? Are you being contracted on capabilities delivered or outcomes achieved? How do you measure outcomes end-to-end, including ongoing governance and continuous improvement?



Enabling change agents

How are you leveraging change agents such as automation, cloud, data/analytics, AI/GenAI, and agentic workflows to accelerate GCC setup and improve steady-state performance? Which use cases are being scaled across clients? Describe your enablement of Services-as-SoftwareTM, the platforms, playbooks, reusable assets, and orchestration that reduce time-to-value and improve consistency.

Innovation

What is your innovation philosophy and framework for GCCs? How do you help clients progress from cost/skills arbitrage to innovation and ecosystem arbitrage? What proof do you have of enabling co-creation, IP/accelerators, new operating models, or new value streams through GCCs?

Go-to-market

What is your primary value proposition for GCC services, and how do you differentiate (lead with capabilities vs. the business problems you solve)? How do you leverage an ecosystem of consulting partners, cloud providers, real estate partners, legal advisors, startups/academia to deliver a OneEcosystem model? Does the market see you as a thought leader? Do clients seek your advice beyond execution?

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Executive summary: GCCs are expecting visible AI-driven outcomes

1	**GCCs are shifting from execution engines to strategic value hubs**	GCCs have reached an inflection point. The mandate is no longer centered on cost arbitrage but on driving business outcomes, innovation, and Services-as-Software models. AI, automation, and cloud are reshaping how centers are built and governed. Our analysis of 160+ GCC-provider engagements indicates that 43% are now AI-centric. GCC leaders are increasingly gaining board-level access and some autonomy to lead enterprise AI agendas..
2	**Providers remain strong on execution but lag on AI-led value proposition.**	GCC leaders expect to see visible outcomes from AI, as well as co-creation and large-scale innovation, alongside reliability and a strong talent pipeline. Our research indicates that 79% of GCC leaders feel that execution is being managed well, while 74% believe that quality and reliability are also being achieved. However, only 32% reported that AI-driven productivity goals are being met, and just 16% said the same for achieving higher innovation. This indicates a growing gap between the positioning of AI and its actual impact.
3	**India remains dominant, but the GCC model is evolving**	India remains a key player in the global GCC landscape, with 76% of enterprises establishing their presence in the country, primarily in cities like Bangalore, Hyderabad, Chennai, and the NCR region. While brownfield expansions account for 54% of these ventures, there is a noticeable shift towards greenfield projects, which make up 31%, and CoE-led models, representing 14%.
4	**The biggest gaps are in value articulation and market influence**	Provider performance diverges most in value proposition clarity and market impact. While many deliver effectively on execution, fewer can articulate a differentiated strategic narrative or demonstrate quantified business outcomes. This separation is reflected in three tiers: Builders focused on efficiency, Accelerators driving transformation, and Orchestrators enabling ecosystem-led innovation.
5	**A new playbook is emerging for GCC leadership**	Leaders are pulling ahead by embracing five shifts: moving toward platform-led Services-as-Software, addressing fragmented enterprise data foundations, orchestrating broader ecosystems, productizing industry-specific capabilities, and redesigning GCCs into hybrid, modular, multi-location models. These capabilities will define the next generation of GCC value creation.

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2 Enterprise GCC evolution and dynamics

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GCCs are on an evolutionary path: From shared services to generative enterprises

	Shared services	Global business services	Generative enterprises
Primary objective	Cost savings	Productivity and scale	Enterprise growth
Work	Transactions	End-to-end processes	Connected enterprise outcomes
Role of data	Reporting	Decision support	Data-as-an-asset
Role of talent	Labor arbitrage	Process experts	AI fluency + orchestration
Role of technology	Process enablement	Productivity-focused digitization	Driving innovation
Operating model	Request-taker	Partner	Ecosystem orchestrator
GCC identity	**Cost center**	**Value enabler**	**Growth engine**

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Top challenges that GCCs face

Defining the right GCC charter

Enterprises often struggle to define a clear GCC mandate across shared services, engineering, AI, or transformation. This lack of clarity leads to fragmented investments, misaligned expectations with providers, and difficulty in scaling the GCC into a strategic enterprise asset.

Talent acquisition and retention at scale

While GCCs promise access to large talent pools, sourcing niche digital, AI, and domain expertise remains highly competitive. Retaining skilled professionals and building leadership pipelines are equally challenging, impacting continuity, productivity, and long-term capability development.

Transitioning from cost center to value hub

Many GCCs remain stuck in legacy delivery roles focused on cost and efficiency. Shifting to innovation, product ownership, and transformation requires changes in mindset, governance, and operating models, which organizations often underestimate or delay.

Managing complex operating models

Selecting and executing the right GCC model, whether BOT, hybrid, or owned, involves complexities in governance, compliance, transition, and vendor coordination. Missteps in these areas can delay value realization and create operational inefficiencies.

Ensuring cultural and organizational integration

Aligning GCC teams with headquarters across culture, leadership, decision rights, and performance expectations is difficult. Without strong integration, GCCs risk becoming isolated delivery units rather than true extensions of the enterprise.

Measuring and demonstrating business outcomes

Organizations struggle to move beyond cost metrics and quantify the true impact of GCCs in terms of innovation, productivity, and transformation. The lack of clear KPIs and governance frameworks limits the ability to justify and scale investments.

Source: HFS Research, April 2026

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GCC leaders expect providers to deliver strong execution, build talent, and drive AI-led innovation and outcomes

01	Reliable GCC execution with speed, governance, and low friction
02	Strong talent engine, including niche digital/AI talent and better retention
03	Visible AI outcomes, not just awareness, and trainings
04	Co-creation and innovation that scales, not endless pilots
05	Real strategic guidance after setup, not just initial launch support
06	Flexible operating and commercial models, not rigid standard templates
07	Contextual thought leadership, tied to their industry, functions, and maturity
08	Customer-first behavior, transparency, and low-surprise delivery
09	Senior sponsorship and ecosystem access
10	Proactive risk and blocker management

Sample: 19 enterprise GCC leaders participated in the survey and interviews
Source: HFS Research, April 2026

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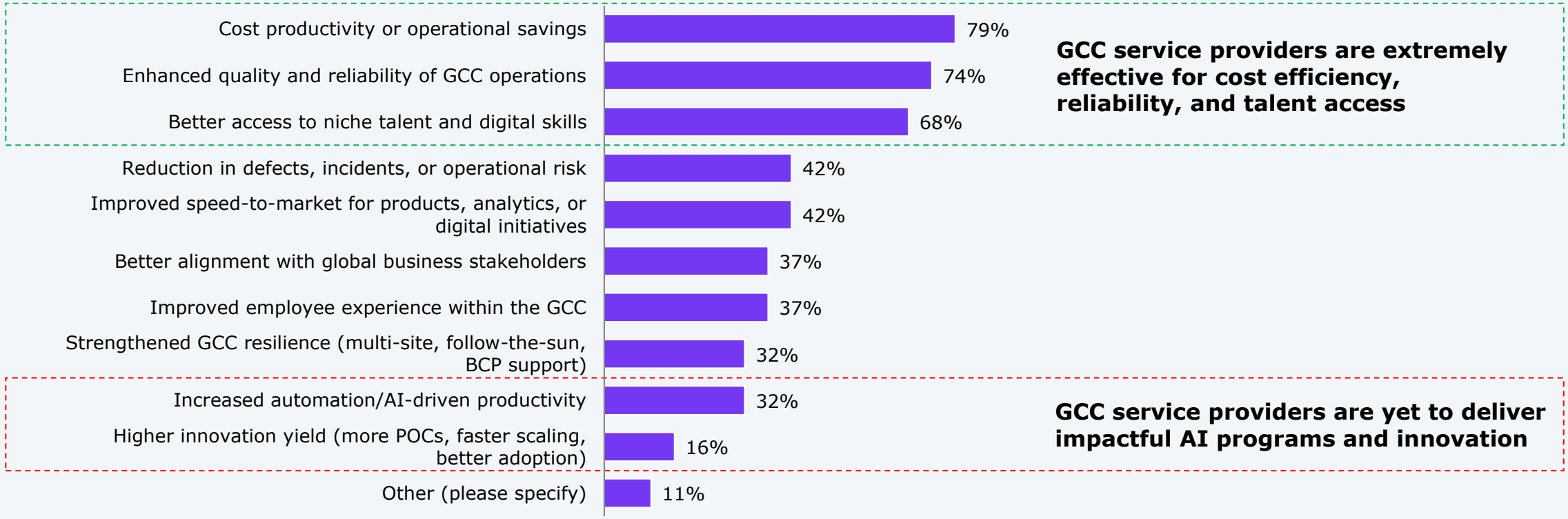
GCC providers are yet to meet expectations of AI-driven productivity and innovation outcomes

Q: What measurable outcomes has the provider enabled for your GCC?



Sample: 19 enterprise GCC leaders participated in the survey and interviews
Source: HFS Research, April 2026

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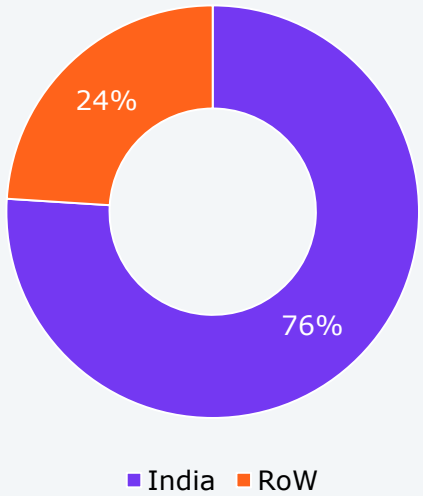
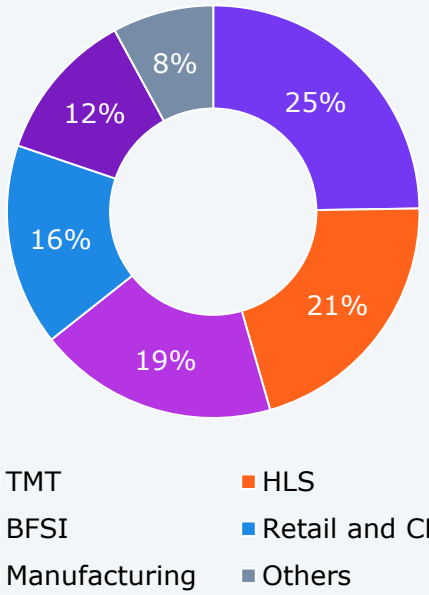
GCC engagements show India's dominance, shifting engagement models, and growing AI adoption

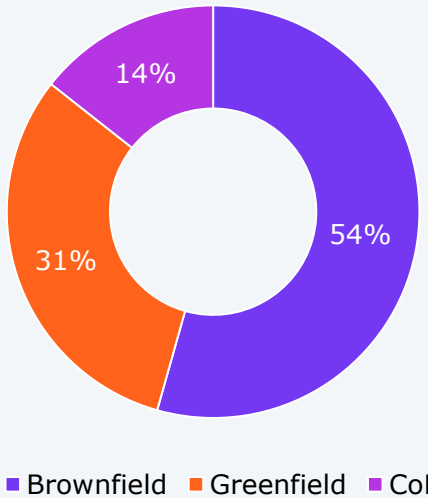
India remains the dominant GCC destination, with nearly three-fourths of new setups



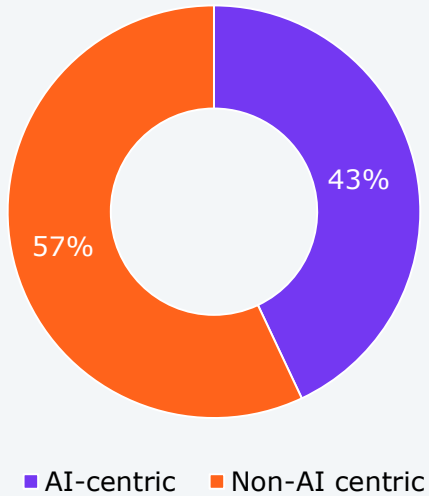
GCC service provider engagements are well distributed across a wide range of verticals



Brownfield engagements continue to dominate, but greenfield and CoE-led setups are gaining momentum



AI-centric GCC engagements are gaining traction, now forming a meaningful share of overall activity



Sample: Based on 160 GCC case studies derived from 24 service providers and wherever details have been specified; RoW includes multiple countries, including Mexico, Poland, Philippines, Egypt, Costa Rica, Malaysia, Australia, and China; other industries include travel, logistics, and business services; AI component engagements include AI CoE, AI analytics, agentic AI, AI automation, and AI-based innovation.
Source: HFS Research, April 2026

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3 GCC provider dynamics

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The winning providers not only build GCCs, but also integrate human and agentic capability systems for enterprises

1 **GCCs are moving from cost centers to enterprise value engines**

Providers repeatedly describe the next phase as a shift from labor arbitrage and support work toward innovation, product/platform ownership, resilience, speed, and business impact. In other words, "**value delivered**" is replacing "**cost saved**" as the headline narrative.

2 **AI is no longer a bolt-on use case; it is increasingly becoming the GCC operating model**

The future-facing language is not just GenAI pilots, but AI embedded into governance, software development lifecycle (SDLC), service management, decisioning, and workforce design. Several providers explicitly point to agentic or autonomous GCC models, where humans supervise increasingly agent-driven operations.

3 **Ownership is shifting from SLAs and tickets to products, platforms, and business outcomes**

Providers are pushing GCCs up the maturity curve, from execution support to product co-ownership, end-to-end process ownership, innovation charters, and measurable business outcomes (faster time-to-market, customer metrics, revenue lift, lower cost-to-serve). This is a major reframing of the GCC mandate.

4 **Hybrid is the new sourcing model: GCC + provider, not GCC versus provider**

Service providers are treating "best sourcing" as an integrated model where GCCs coexist with managed services, augmentation, BOT/BOTT/MBOT structures, and advisory-led orchestration. Matured GCCs often integrate in-house teams with provider-augmented teams, viewing outsourcing alliances and GCC operating models as complementary rather than competing options.

5 **AI-ready and domain-rich talent is becoming the primary competitive moat**

The market is moving toward AI-ready, domain-rich, enterprise-mature talent, not just scale hiring. Providers emphasize leadership quality, product/data/cloud/cyber skills, employer branding, AI academies and CoEs, along with continuous reskilling.

6 **The footprint strategy is becoming multi-hub, resilience-led, and more distributed**

Tier-1 cities in India remain central, but providers are increasingly talking about tier-2 and 3 cities, nearshore options, and multi-hub designs to balance talent, cost, resilience, and geopolitics. This suggests that the next GCC wave will be less about one flagship city and more about portfolio-based footprint design. It also opens the door to more mid-market and smaller-scale GCCs.

7 **Providers are productizing GCC services into platforms, ecosystems, and "GCC-as-a-Service" models**

GCC services are being industrialized with GCC-in-a-Box, Services-as-Software, AI operating stacks, platform-led governance, talent engines, and ecosystem orchestration with real estate, academia, hyperscalers, startups, and specialist partners. The market is moving from bespoke consulting to repeatable, IP-led GCC platforms.

Source: HFS Research, April 2026

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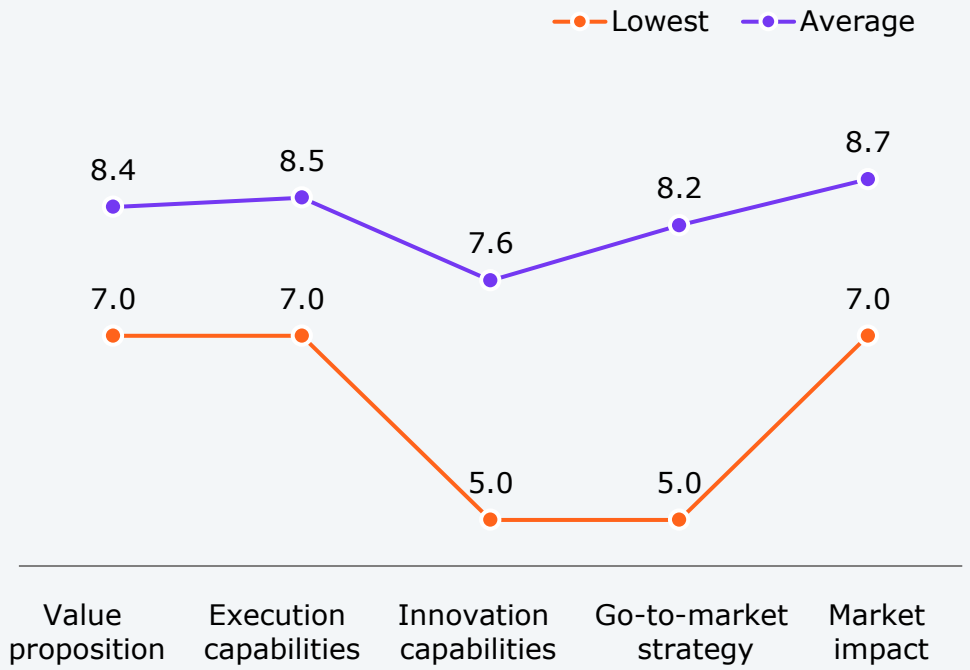
GCC leaders think service providers deliver on execution but must improve on innovation, strategy, and measurable impact

Client kudos

- Strong execution engine and proven playbooks
- Speed-to-market for GCC setup
- Strong talent acquisition capability
- Thought partnership on strategy and roadmap
- Deep GCC ecosystem knowledge
- Customer-first, partnership-led behavior
- Straightforward business/transparent commercials
- Reliable delivery quality
- Leadership commitment and senior accessibility
- Flexibility in contracting/engagement models
- Good domain or contextual understanding
- Innovation enablement when concrete
- Strong market insight and thought leadership

Customers' score and feedback



Client critics

- AI claims are not yet showing clear business benefits
- Innovation is too tactical, not strategic
- Need stronger adoption of emerging technologies
- Rigid/cookie-cutter operating models
- Need strategic evolution after initial setup
- Need more proactive issue, blocker, and risk escalation
- Governance and communication need tightening
- Talent quality gaps in niche areas
- Talent retention/bench/sourcing agility remain issues
- Domain depth is uneven
- Thought leadership is not sufficiently applied in the client's context
- Commercial/contracting clarity can improve
- Need more ecosystem leverage

Sample: 19 enterprise GCC leaders participated in the survey and interviews
Source: HFS Research, April 2026

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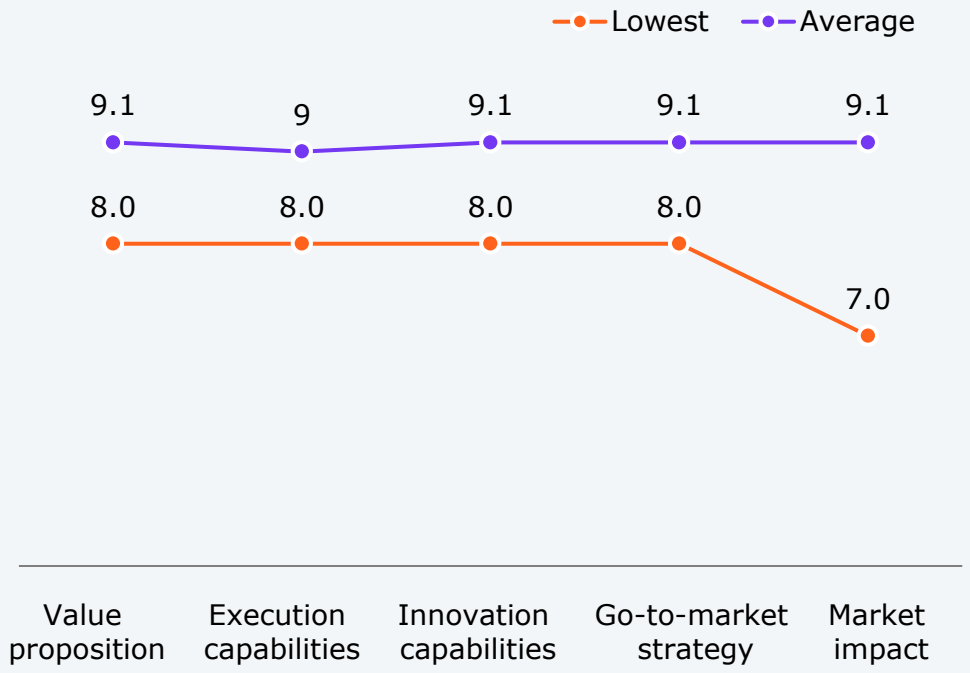
Partners too think that service providers deliver on execution but must improve their GTM sharpness and measurable outcomes

Partners kudos

- End-to-end GCC lifecycle capability
- Practical AI/automation orientation
- Deep domain expertise and business understanding
- Strong execution discipline and reliable delivery
- Co-creation mindset
- Outcome-led framing
- Responsiveness and collaborative behavior
- Flexible commercial and operating models
- Strong technical alignment with ecosystem partners
- Modernization capability with low disruption

Partners' score and feedback



Partners critics

- Innovation is not yet standardized enough
- AI vision sometimes runs ahead of execution
- Require sharper GTM and market positioning
- Lack of deeper joint GTM/co-investment
- Slow turnaround and more agility
- Need stronger repeatability for scale
- More geographic or talent footprint
- Deliver clear, quantified business outcomes
- Need more disruptive GCC models
- Need stronger data and integration foundations

Sample: 21 technology partners, part of the sourcing and procurement ecosystem, worked with GSIs
Source: HFS Research, April 2026

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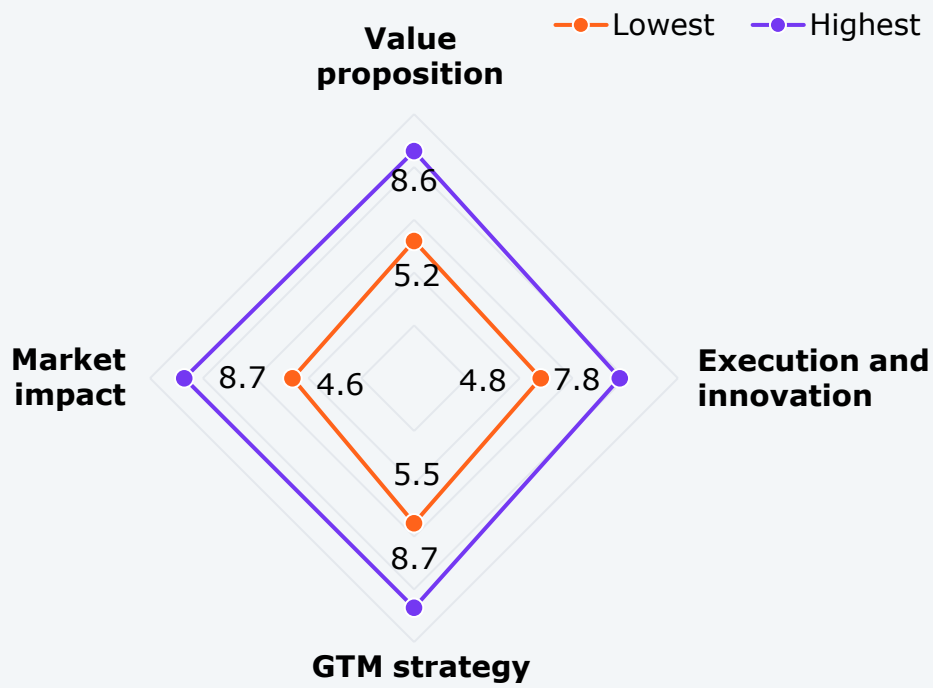
Service providers deliver uneven performance, but gaps are widest in value proposition and market impact

The overall score of the GCC service providers



Overall service provider score → **Highest: 8.3**
Lowest: 5.0

Best practices that we have seen across all four parameters

- **Value proposition:** Horizon 3 leaders view GCCs as strategic hubs for innovation. They aim to create new revenue streams, reduce manual IT support, and accelerate development cycles while emphasizing innovation charters and measuring transformation outcomes.
- **Execution and innovation:** Leaders of GCC service providers have created repeatable platform stacks, talent engines, governance models, and transformation mechanisms. H3 players' intellectual property and platforms form a cohesive operating system that integrates strategy, operations, optimization, talent, AI, the ecosystem, and outcome realization rather than relying on a modular approach.
- **GTM strategy:** GCC market leaders look more like ecosystem orchestrators and market shapers with industrialized and proactive GCC GTM motion; the others look more like capable solution providers responding to GCC demand.
- **Market impact:** Market leaders demonstrated strong market validation with hundreds of active GCC engagements, significant full-time hires, and a solid presence across all HFS value chain stages. They also created a large innovation ecosystem involving tech partners, startups, academia, state governments, and research labs.

Sample: 24 Service providers' score based on the assessment criteria
Source: HFS Research, April 2026

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Service providers must enable GCCs to become Generative Enterprises by shifting to Services-as-Software and outcome-led models

Shift to Services-as-Software	Move beyond traditional delivery and build integrated, platform-led Services-as-Software models. Help GCCs bring together strategy, talent, and technology so they can operate as Generative Enterprises.
Fix the data foundation	GCCs cannot become Generative Enterprises with fragmented data. Take the lead in building unified, enterprise-wide data platforms that connect GCC and global operations and support better decision making and automation.
Orchestrate the ecosystem	Enabling a Generative Enterprise requires strong ecosystems. Bring together technology partners, academia, governments, and talent networks and help GCCs turn these relationships into scalable innovation and business outcomes.
Productize industry capabilities	Go beyond generic offerings and invest in industry-specific Services-as-Software, accelerators, and domain talent. Help GCCs scale faster with solutions that deliver measurable business impact across use cases.
Help redesign the GCC model	Guide enterprises toward hybrid, multi-location GCC models built on modular, flexible constructs. Help them evolve into connected, outcome-led operating units that can continuously adapt and deliver value.

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GCC service provider participants

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24 service providers have been evaluated in this report

Note: All service providers are listed alphabetically

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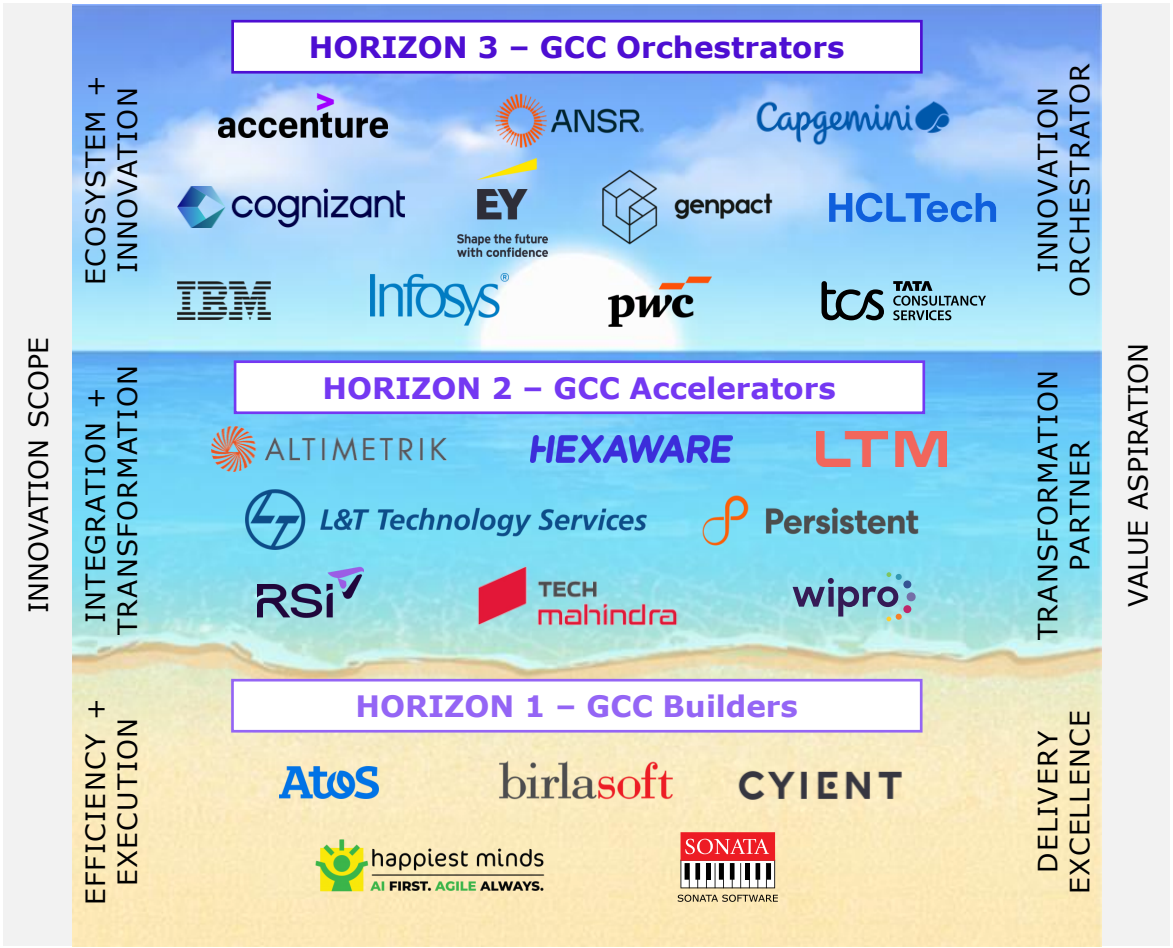
HFS Horizons for GCC service providers, 2026



Horizon 3 providers demonstrate

- All Horizon 2 capabilities plus orchestration of a OneEcosystem model; connecting enterprises, startups, academia, and tech partners
- Ability to drive business model innovation, helping clients evolve from cost or skills arbitrage to innovation and ecosystem arbitrage
- Strategic advisory and execution excellence at scale, spanning talent, domain, technology, and data value chains
- Expertise in AI, GenAI, analytics, and automation to enable next-generation GCCs as autonomous digital units
- Proven capability to drive co-creation, IP generation, and new revenue models with referenceable clients for co-innovation and strategic value creation, not just operational efficiency

Horizon 2 providers demonstrate

- All Horizon 1 capabilities plus enterprise-level consulting depth and the OneOffice mindset, aligning customer, employee, and business outcomes
- Experience driving end-to-end digital and process transformation and optimization
- Proprietary IP, playbooks, or platforms enabling faster setup, scalable operations, and governance maturity
- Use of automation, cloud, and AI to accelerate digital integration within GCCs
- Focus on talent transformation and skill enablement to sustain global delivery
- Highly referenceable clients recognizing them for innovation and transformation impact, not just execution

Horizon 1 providers demonstrate

- Proven ability to design and operationalize GCCs across multiple geographies
- Expertise in driving functional digital transformation for enterprise clients
- Strong execution and implementation skills to deliver business outcomes post-setup
- Emphasis on process efficiency, compliance, and cost reduction as key value levers
- Robust technical skills and structured methodologies for location strategy, talent acquisition, and setup governance
- Referenceable clients validating delivery consistency and operational excellence

Note: All service providers within a Horizon are listed alphabetically
Source: HFS Research, April 2026

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5 EY profile: GCC service providers, 2026

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EY: Scale-led, consulting-first GCC transformation provider evolving toward AI-driven Services-as-Software execution

Strengths	Development opportunities
• **Value proposition:** Delivers end-to-end GCC lifecycle services combining consulting, tax, risk, and technology capabilities, enabling enterprises to design, build, scale, and transform global capability centers with integrated governance and transformation support. • **Capabilities:** With ~23,000 GCC practitioners and ~1,200 engagements across 500 clients, EY demonstrates scaled execution across build-operate-transfer, transformation, and post-merger integrations. • **Go-to-market:** Strong thought leadership (57% share of voice in media), flagship GCC Pulse and benchmarking studies, and global CXO forums position EY as a market shaper. GTM is ecosystem-centric, with partners such as Microsoft, ServiceNow, IBM, Databricks, Snowflake, and startup-led co-innovation embedded in client pursuits. • **Outcomes:** EY enables measurable outcomes such as workforce pyramid optimization, 25%–40% reduction in time to hire, 30%–50% improvement in recruiter productivity, process automation (O2C, P2P), and GCC scope expansion. • **Innovation:** Invests in intelligent GCC frameworks leveraging AI, automation, proprietary platforms, and workforce transformation initiatives to help enterprises evolve GCCs toward future-ready, data-driven operating models.	• **Value proposition:** While strong in consulting-led transformation, EY can further productize offerings into modular, platform-based solutions with clearer outcome-linked pricing. • **Capabilities:** Despite strong ecosystem integration, limited visibility of proprietary platforms at scale (vs. peers) may constrain repeatability. Scaling internal IP (AI platforms, automation frameworks) into standardized, reusable solutions remains an opportunity. • **Go-to-market:** Formalizing a global GTM playbook with region-specific proof points outside India coverage would broaden addressable pipeline.

Relevant M&A and partnerships	% of clients by major geography and vertical	Key clients
Acquisitions (2020–2025) • Nuvalence (Canada) (2024) • Spotmentor Technologies (2020) **Partnerships:** Microsoft, ServiceNow, IBM, Databricks, Snowflake, SAP, Celonis, UiPath, Pega, Nvidia, Dell		**Number of clients:** 500+ global clients across 1,200+ GCC engagements **Key clients** • Major conglomerates across a broad range of sectors, including Financial Services, Consumer Products, Technology, Media & Telecommunications, Life Sciences, and Industrial & Energy

Global operations and resources	Value chain presence	Flagship internal IP
• **GCC services headcount:** 23,000+ • **Number of CoEs and** delivery/innovation centers: 15+ BOT GCC set ups covering 3,300+ FTEs; 100+ delivery centers, innovation spaces, and AI labs • **Location of centers by major geos:** US, India, Ireland, Germany, Switzerland, Netherlands, France, Spain, Oceania, Japan, Korea, Poland, Hungary, Romania, Portugal, Costa Rica, Mexico, Colombia, Brazil, Philippines, China, Malaysia	• Client identification and outreach: Strong • GCC design and setup: Strong • Operational management and optimization: Strong • Digital transformation and innovation enablement: Strong • Talent management and workforce transformation: Strong • Strategic alignment and business integration: Strong	• **EY Fabric:** Platform that enables rapid development and scaling of AI, data, and automation solutions supporting enterprise and GCC transformation. • **EY Catalyst:** Transformation accelerator used to design and implement AI-driven operating models and digital transformation programs. • **EY Intelligent Process Discovery:** Process intelligence tool that analyzes operational workflows to identify automation, efficiency, and transformation opportunities in GCC operations. • **EY Benchmarking Tool:** Data-driven platform benchmarking GCC cost, operations, and performance against industry peers to guide strategy and optimization. • **EY AI Maturity Assessment:** Framework assessing enterprise and GCC readiness for AI adoption across technology, governance, talent, and operations. • **EY Process Depot:** Repository of leading-practice process models used to design and optimize GCC service delivery and operating models.

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Achyuta Ghosh is a strategist, researcher, and industry voice for enterprises navigating the defining shifts of our time. As an Executive Research Leader at HFS Research, he partners with CXOs and transformation leaders across the world's largest organizations to develop global capability center (GCC) strategies.

Previously at Nasscom, he built and led the thought leadership function into a powerhouse of influence, setting their growth trajectories, delivering strategic insights, advising global enterprises, and developing national policy frameworks.

Earlier in his career, Achyuta held leadership roles at Ford Motor Company, where he launched the India Smart Mobility business. He also served at WNS, Genpact, and Frost & Sullivan.

Achyuta holds a bachelor's in electrical engineering and an MBA from the University of Mumbai. Off the clock, he can be found on his motorcycle, immersing himself in history and biographies, and exploring new cultures and ideas.

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Srini Vaddepalli is a practice leader and analyst at HFS Research, specializing in global business services, the manufacturing industry, and global capability centers. With more than 17 years of experience across service providers (Capgemini), analyst firms (ISG), and enterprise organizations (Eastman Chemical), Srini brings a comprehensive perspective on information technology (IT) services.

He has consistently collaborated with key stakeholders to generate actionable insights supporting strategic decision-making. His expertise also extends to exploring the transformative impacts of AI, automation, and data analytics, focusing on Industry 4.0, sustainability, circular economy practices, and operational efficiencies in the chemical, energy, and utilities industries.

Srini holds a commerce degree and a dual master's in library and information science and MBA (marketing). He also completed a Business Analytics Executive Education Program at IIM Bangalore.

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Mayank Madhur is a Practice Leader at HFS Research, driving deep research and insights into the healthcare and life sciences verticals, along with digital engineering as a horizontal. He holds the Sustainability and Climate Risk (SCR) certification from GARP and is a certified Project Management Professional (PMP®).

With over a decade of experience in research, strategy, pre-sales, and software development, Mayank blends analytical rigor with execution. His professional journey began as a software engineer in the medical device domain, followed by a pre-sales position at Altimetrik, which gave him a unique perspective spanning technical development and solutioning.

He holds an MBA from BITS Pilani, a PGPM in healthcare management from LIBA, and a bachelor's degree in electrical and electronics engineering. He also completed an executive program in strategic management from IIM Kashipur and a postgraduate diploma in public health. Reflecting his commitment to continuous learning, he is currently pursuing an MSc in applied mathematics.

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