



WHAT IT TAKES TO BE A GCC HEAD IN INDIA

An Overview Of Current GCC Leadership And A Playbook For Aspiring Heads

A Zinnov Point of View

April 2025

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EXECUTIVE SUMMARY

- A robust succession strategy starting from the N-2 level is crucial to building future GCC heads and ensuring seamless leadership continuity
- Every GCC must follow a structured succession plan for the Head position and ensure that the candidate is selected after a series of steps and is mentored by the Current Head along the way

Background of Current GCC Heads

- 2 in every 3 leaders in the top 50 GCCs in India hold a Master's degree, underscoring the critical role of advanced education in attaining leadership position
- Heads of the top 50 GCCs in India average ~30 years of total experience, including ~23 years within the GCC ecosystem and ~5 years at the "Head-1" level, highlighting the significance of extensive, domain-specific leadership experience

Way Forward for GCCs

Key Traits Required to be a GCC Head

- Soft skills overshadow technical expertise, highlighting a shift towards valuing strategic thinking and interpersonal effectiveness in leadership roles
- People Leadership, strategic planning, and Stakeholder management are the most important and emphasized skills for GCC heads
- Emotional intelligence and geopolitical awareness are equally important but remain underemphasized

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OBJECTIVE

EVALUATING THE CURRENT LANDSCAPE AND FUTURE PROSPECTS OF GCCs IN INDIA

ANALYZING THE CURRENT BACKGROUND OF LEADING GCC HEADS

CRAFTING A PLAYBOOK FOR ASPIRING LEADERS TO SUCCEED AS GCC HEADS

DEVELOPING A GUIDE FOR GCCs TO TRAIN AND NURTURE FUTURE LEADERS

TARGET AUDIENCE



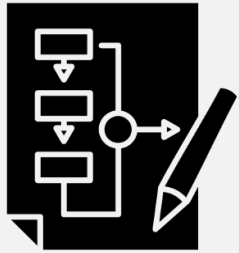
CENTRE
HEADS



ASPIRING
GCC HEADS



HR AND
TALENT
DEVELOPMENT
TEAMS



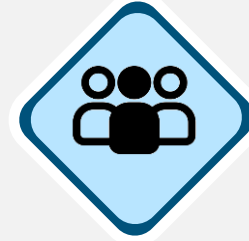
Approach & Methodology



Zinnov Proprietary Database

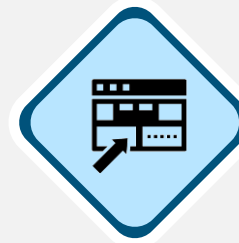
Leveraged knowledge database accumulated over the last 20+ years. This includes:

- (a) Proprietary knowledge repositories and research reports on GCC Ecosystem
- (b) Insights on leadership planning and development



Leveraging Zinnov's SME Network

Zinnov leveraged the knowledge and experience of SMEs' (subject matter experts) in the ecosystem, key industry partnerships, network of MNC companies, and GAP (GCC Accelerator platform) initiatives to gather insights



Secondary Research

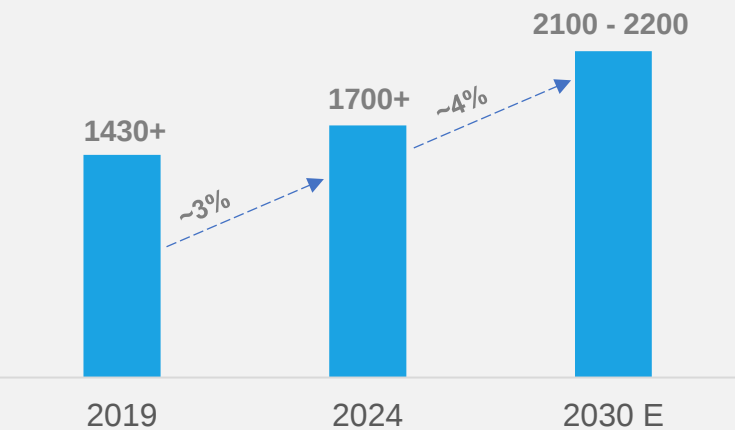
Gathered information in public domains in the context of the report. This includes:

- (a) LinkedIn profile analysis
- (b) Public reports
- (c) Press announcements, media publications, etc.

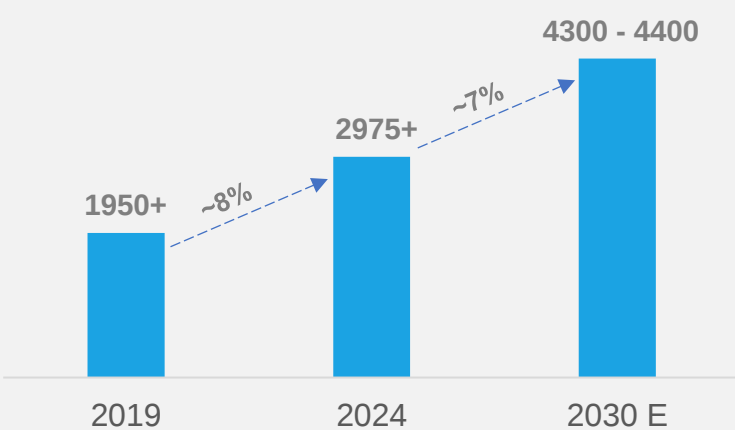
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The GCC industry in India is experiencing rapid growth, with a CAGR of approximately ~4%, underscoring India's emergence as a global hub for GCCs

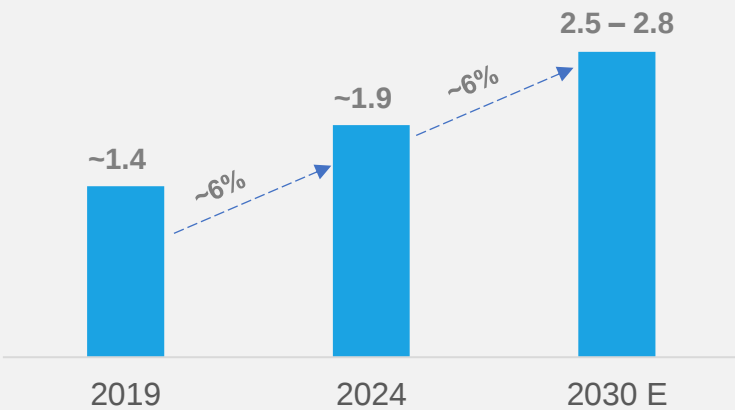
Growth of GCC in India



Growth in GCC Units in India



Growth of GCC Headcount (In Mn)



KEY HIGHLIGHTS

- The number of GCCs in India is projected to grow from approximately 1700 in 2024 to 2200 by 2030, marking a significant expansion of 29.4% over six years, reinforcing India's role as a global hub for GCCs

- The GCC units in India are set to increase from 2975 in 2024 to 4300 by 2030.
- With 2200 centers expected by 2030, it averages ~2 centers per GCC
- The massive growth is fueled by cost efficiency, government support, and strong tech infrastructure in India

- The headcount in GCCs is expected to reach 2.5 million by 2030, up from 1.9 million in 2024.
- On average, 50% of the workforce for GCCs will be based in India. When juxtaposed against the shift to Digital and ER&D, GCCs in India will witness high demand for specialized and niche skills.

Key Drivers for GCC Growth in India



Cost Efficiency

India offers cost advantages in operations, infrastructure, and labor compared to Western markets, leading to savings for MNCs



Government Support & Policies

Streamlined regulations, faster approvals, and tax benefits, including SEZ advantages, make India an attractive destination for GCCs



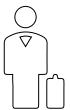
Strong IT & Tech Ecosystem

India is home to a thriving IT industry with established global tech companies, startups, and service providers which provides a robust ecosystem



Proximity to Emerging Markets

The geographic location of India provides strategic access to fast-growing markets in Asia, the Middle East, and Africa

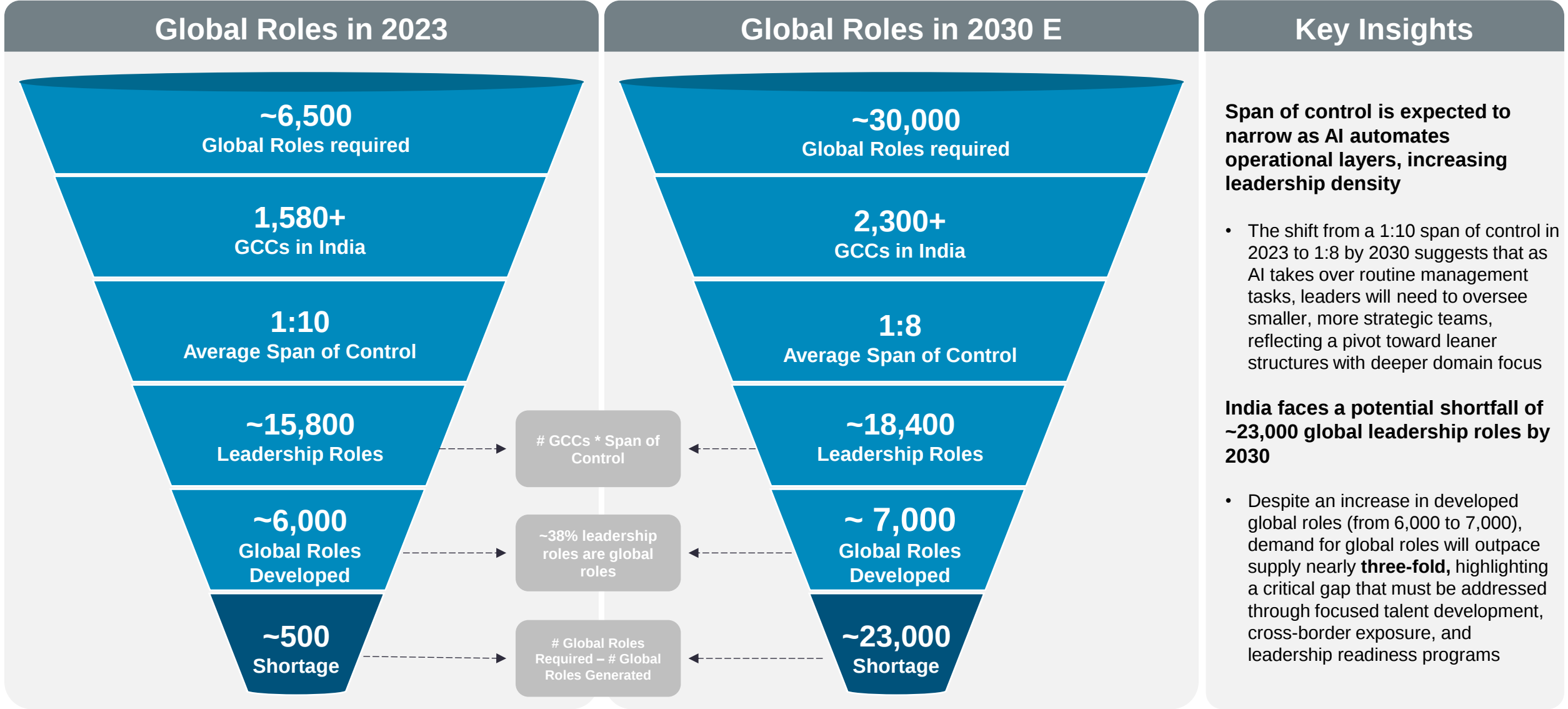


Highly Skilled Talent Pool

India has a vast, skilled workforce, especially in IT, engineering, analytics, finance, and R&D, making it an ideal location for GCCs

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Growth in GCCs is driving exponential demand for global leadership, but talent development isn't keeping pace



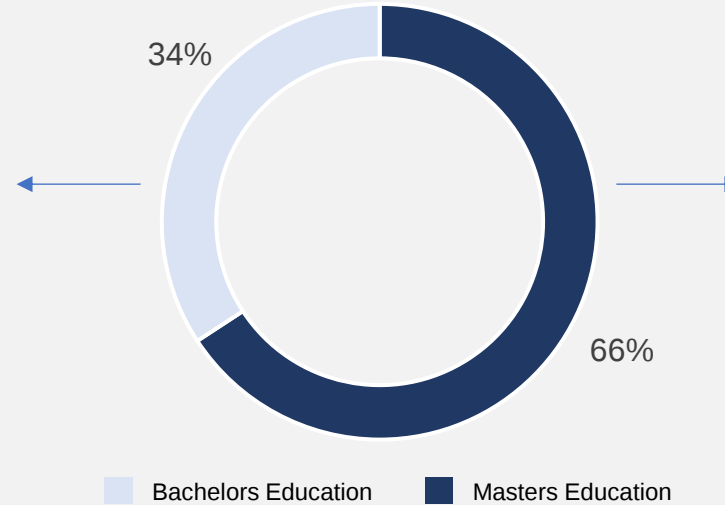
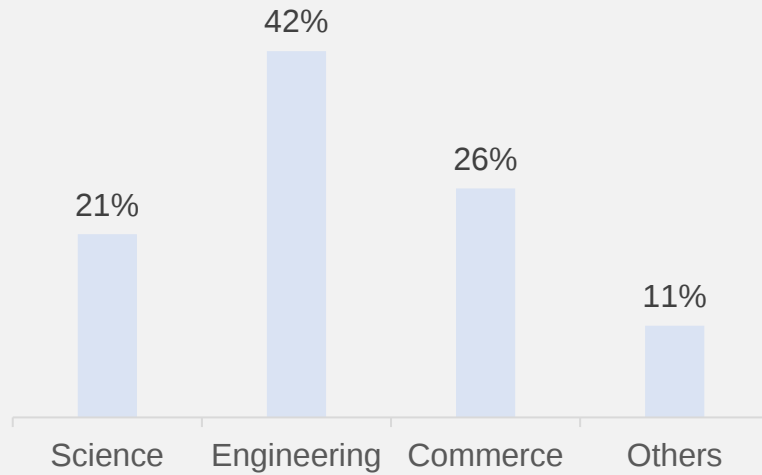
Note: ~38% of the overall leadership roles are global roles. The analysis is based on top 50 GCCs analyzed

Source: Zinnov GCC Platform Research and Analysis; N = 50

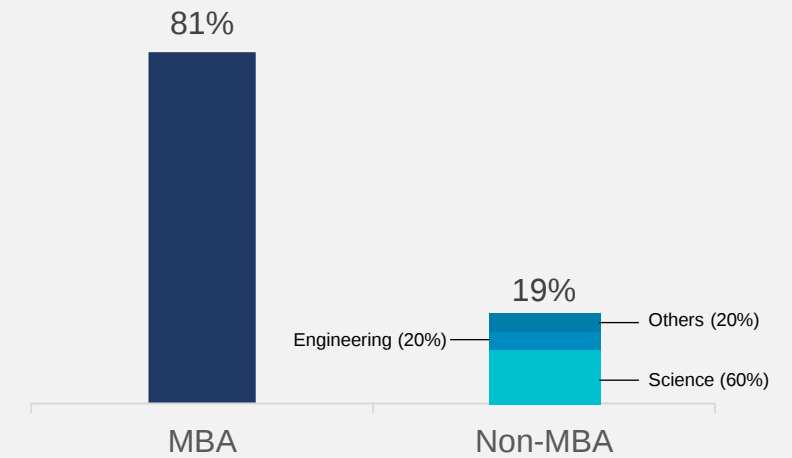
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GCC Heads come from diverse academic backgrounds, with Engineering leading at the bachelor's level with ~42% graduates and Management at the master's with ~81% graduates

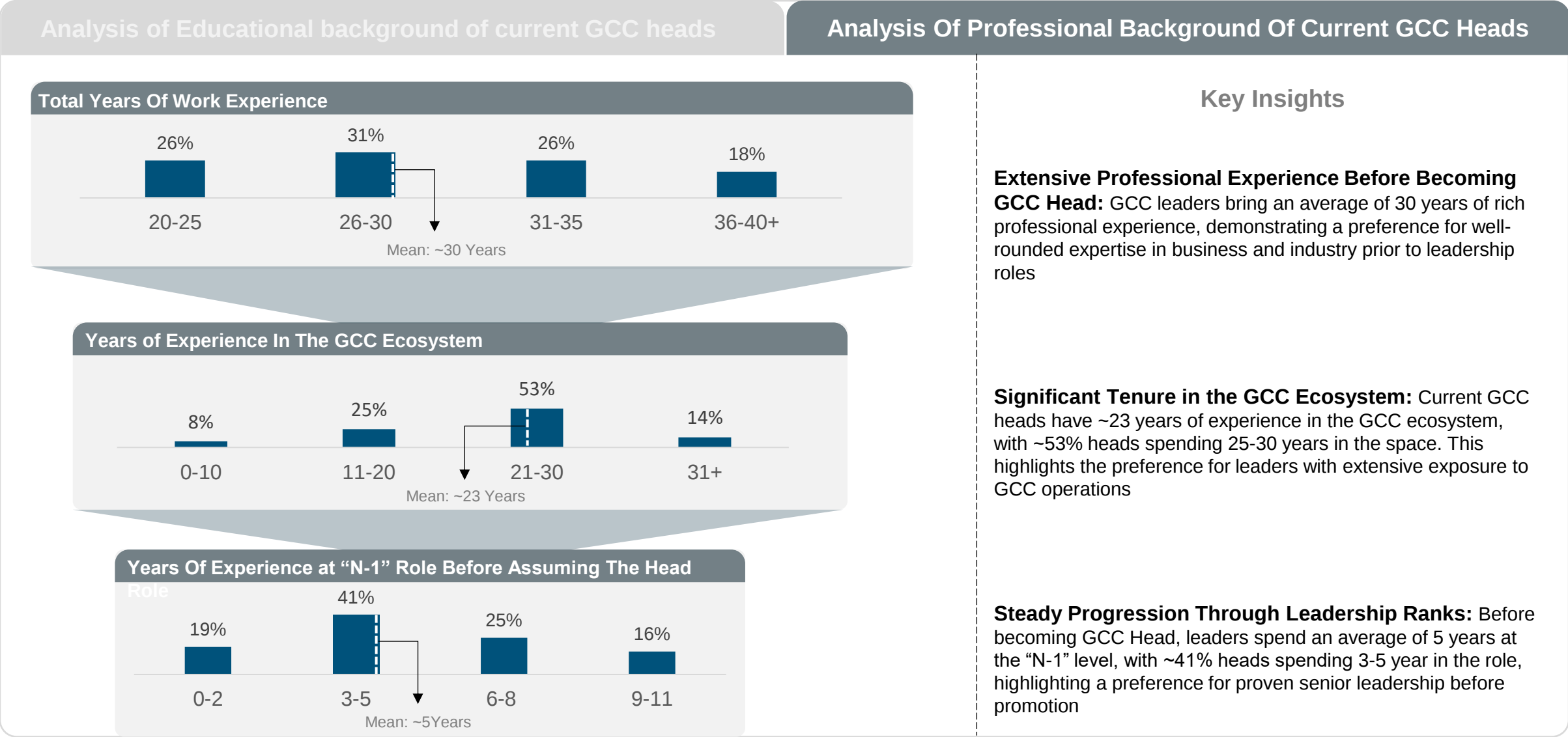
Analysis of Educational background of current GCC heads



Analysis Of Professional Background Of Current GCC Heads

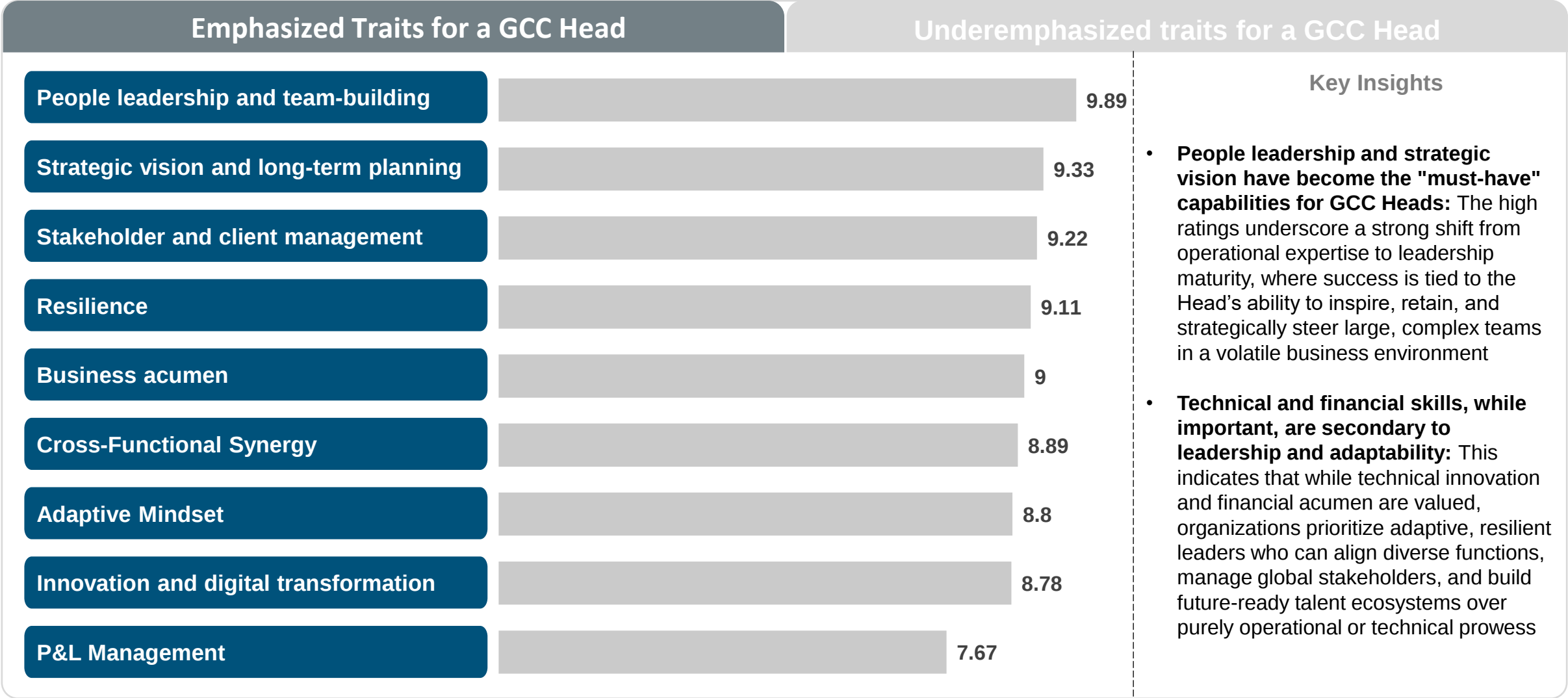


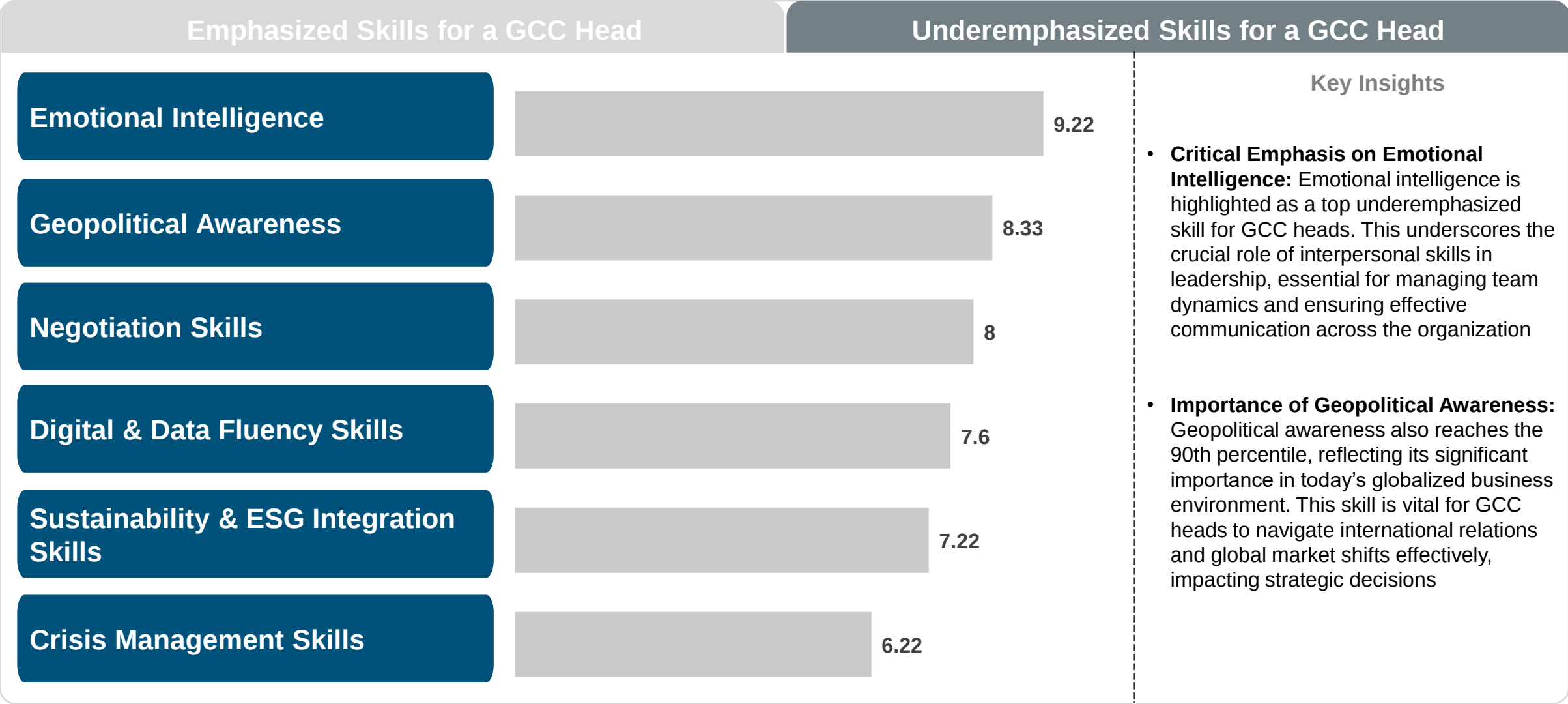
- **Higher Education is a Key Enabler for Leadership:** 2 in every 3 leaders in the top 50 GCCs in India hold a Master's degree, underscoring the critical role of advanced education in attaining leadership position
- **Shift from Science to Commerce in Higher Education:** While ~62% of GCC leaders start with a science & engineering background in their undergraduate studies, about two-thirds later pivot to management-focused Master's programs, reflecting a strategic shift towards business acumen to create well-rounded leaders
- **Limited Representation from Other Fields:** Fields outside of science and commerce are underrepresented in GCC leadership, accounting for only ~10% of Bachelor's and ~4% of Master's degree holders, indicating a strong preference for traditional educational paths



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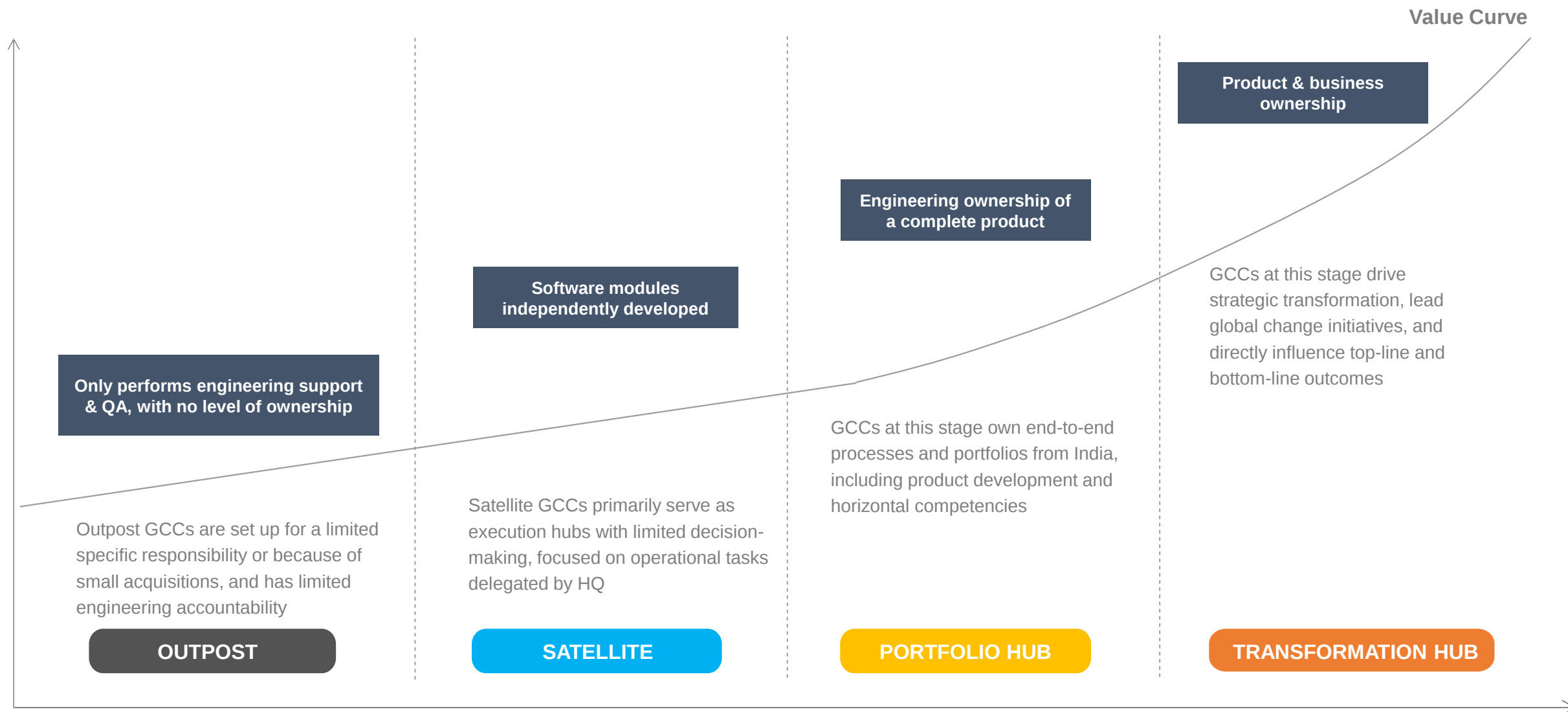
According to current GCC heads, People leadership and team-building and Strategic vision and long-term planning are the top skills they seek in their successors





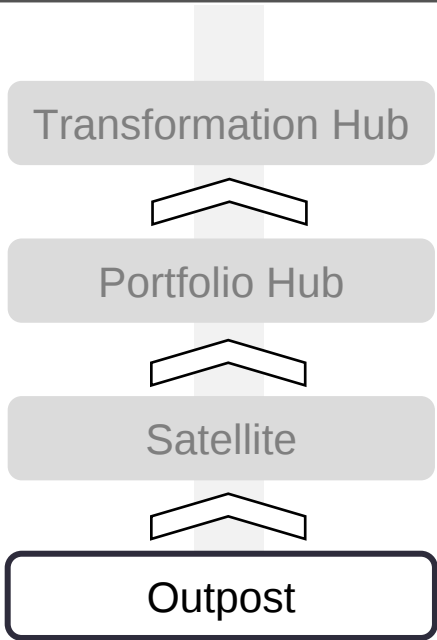
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The responsibilities of a GCC head evolve with the center's maturity, requiring them to adapt their approach and take on different roles at various stages of its development



At the Outpost stage, the GCC head plays a foundational role—focused on setting up operations, aligning with global objectives, and driving executional excellence

EVOLVING ROLE OF THE HEAD BASIS MATURITY



Key responsibilities

- Ensure **operational efficiency** and alignment with the global HQ's directives
- Establish **core technical capabilities** and deliver on predefined mandates
- Build foundational team culture and talent practices
- Initiate government and regulatory compliance to ensure smooth setup

EMPHASIZED SKILLS REQUIRED TO BE THE HEAD IN AN OUTPOST GCC

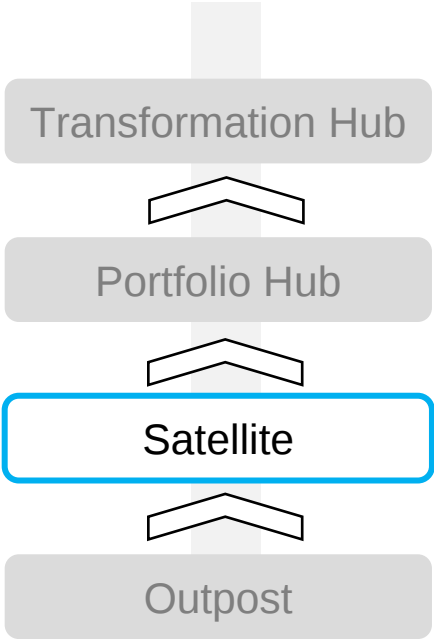
People leadership and team-building			
Strategic vision and long-term planning			
Stakeholder and client management			
Resilience			
Business acumen			
Cross-Functional Synergy			
Adaptive Mindset			
Innovation and digital transformation			
P&L Management			

UNDEREMPHASIZED SKILLS REQUIRED TO BE THE HEAD IN AN OUTPOST GCC

Emotional Intelligence			
Geopolitical Awareness			
Negotiation Skills			
Digital & Data Fluency Skills			
Sustainability & ESG Integration Skills			
Crisis Management Skills			

As the GCC evolves into a Satellite, the head takes on broader responsibilities such as driving regional growth, managing budgets, and aligning the center’s operations with overarching business objectives

EVOLVING ROLE OF THE HEAD BASIS MATURITY



Key responsibilities

- Drive regional growth and market expansion initiatives
- Assist in **financial governance** — including budgeting, profitability, and cost control
- Oversee **operational excellence** with business goal alignment
- Build external relationships with partners, clients, and government bodies

EMPHASIZED SKILLS REQUIRED TO BE THE HEAD IN A SATELLITE GCC

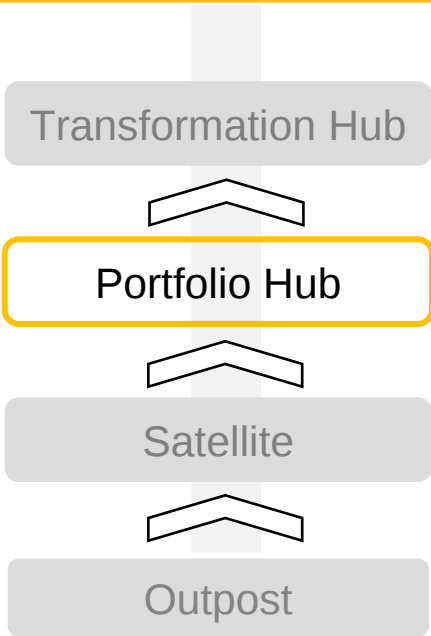
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Crisis Management Skills			

The Portfolio Hub phase marks a shift from support to ownership, with the GCC head championing the parent organization's India strategy, owning the P&L, and leading the portfolio

EVOLVING ROLE OF THE HEAD BASIS MATURITY



Key responsibilities

- Execute the parent organization’s **India strategy**, aligning with global and regional objectives
- Own and **drive full P&L responsibility** with a focus on sustainable growth
- Lead integrated marketing, branding, and client engagement strategies
- Build a high-performing and innovation-driven organizational culture

EMPHASIZED SKILLS REQUIRED TO BE THE HEAD IN A PORTFOLIO HUB GCC

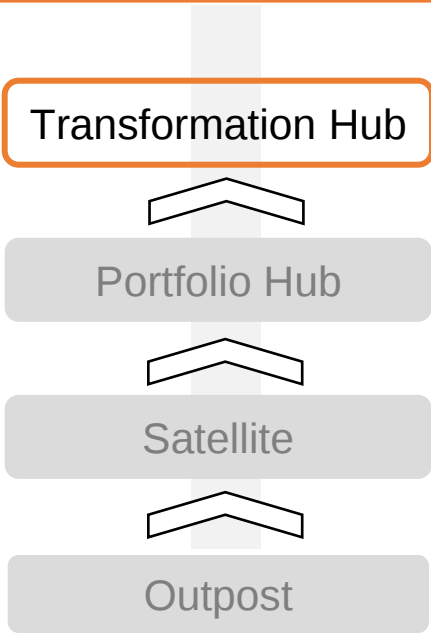
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Resilience			
Business acumen			
Cross-Functional Synergy			
Adaptive Mindset			
Innovation and digital transformation			
P&L Management			

UNDEREMPHASIZED SKILLS REQUIRED TO BE THE HEAD IN A PORTFOLIO HUB GCC

Emotional Intelligence			
Geopolitical Awareness			
Negotiation Skills			
Digital & Data Fluency Skills			
Sustainability & ESG Integration Skills			
Crisis Management Skills			

In its final maturity stage, the GCC becomes a catalyst for enterprise-wide transformation, with the head driving cross-BU integration, innovation, and global strategic initiatives

EVOLVING ROLE OF THE HEAD BASIS MATURITY



Key responsibilities

- Enable cross-BU and cross-functional collaboration to maximize firm-wide impact
- **Lead governance, risk, and compliance** frameworks at enterprise level
- **Drive strategic initiatives**, innovation roadmaps, and C-suite alignment
- Strengthen employer branding and forge external partnerships within the ecosystem

EMPHASIZED SKILLS REQUIRED TO BE THE HEAD IN A TRANSFORMATION HUB GCC

People leadership and team-building			
Strategic vision and long-term planning			
Stakeholder and client management			
Resilience			
Business acumen			
Cross-Functional Synergy			
Adaptive Mindset			
Innovation and digital transformation			
P&L Management			

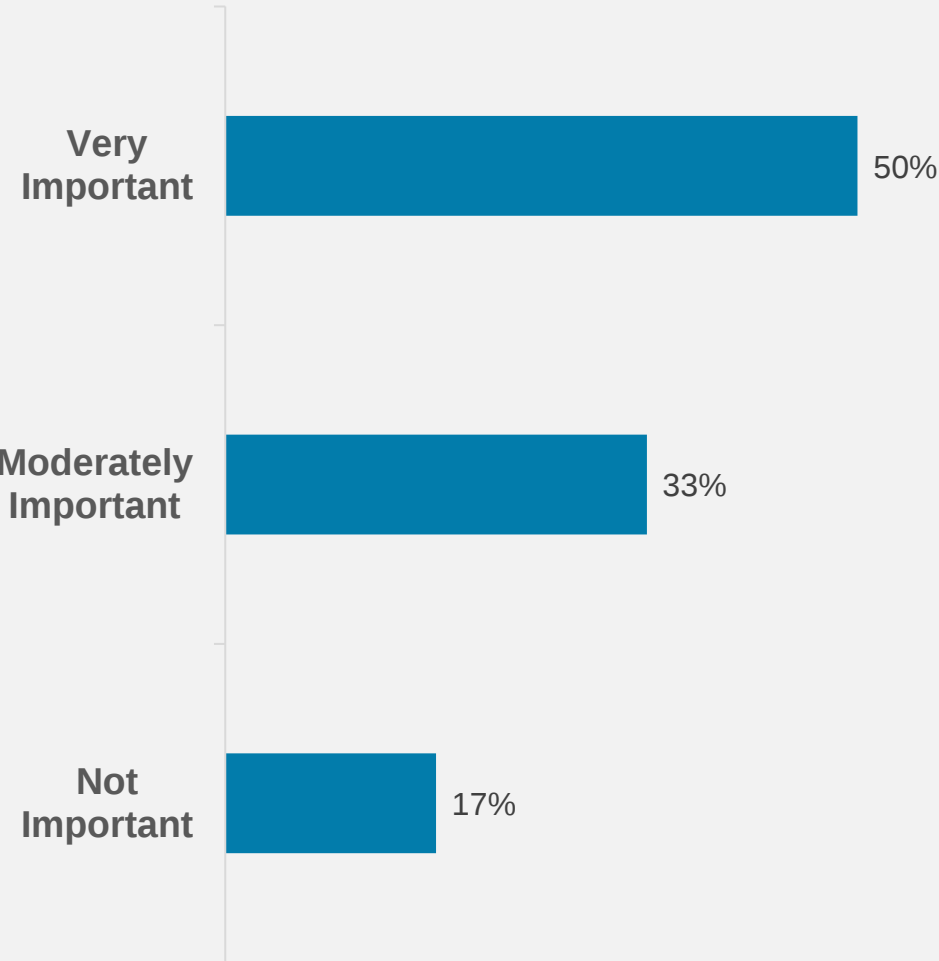
UNDEREMPHASIZED SKILLS REQUIRED TO BE THE HEAD IN A TRANSFORMATION HUB GCC

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1 in 2 center heads view global exposure as crucial, with ~32% favoring collaboration with HQ and global teams as their preferred way of gaining such exposure

Importance of Global Exposure for a center head



Ways to gain global exposure

Attending global leadership conferences

Engaging in cross-country leadership rotations

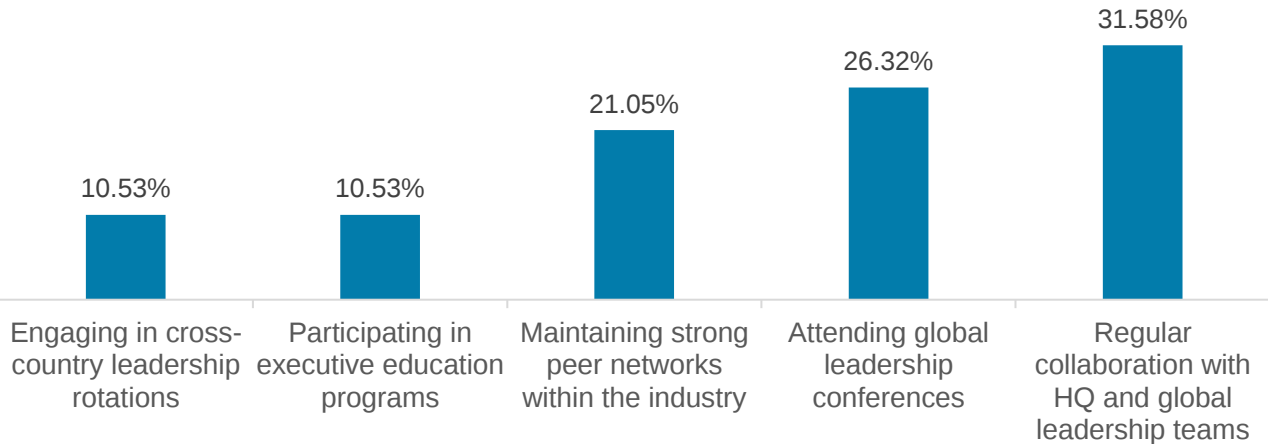
Maintaining peer network within the industry

Collaboration with HQ and global leadership teams

Participating in executive education programs

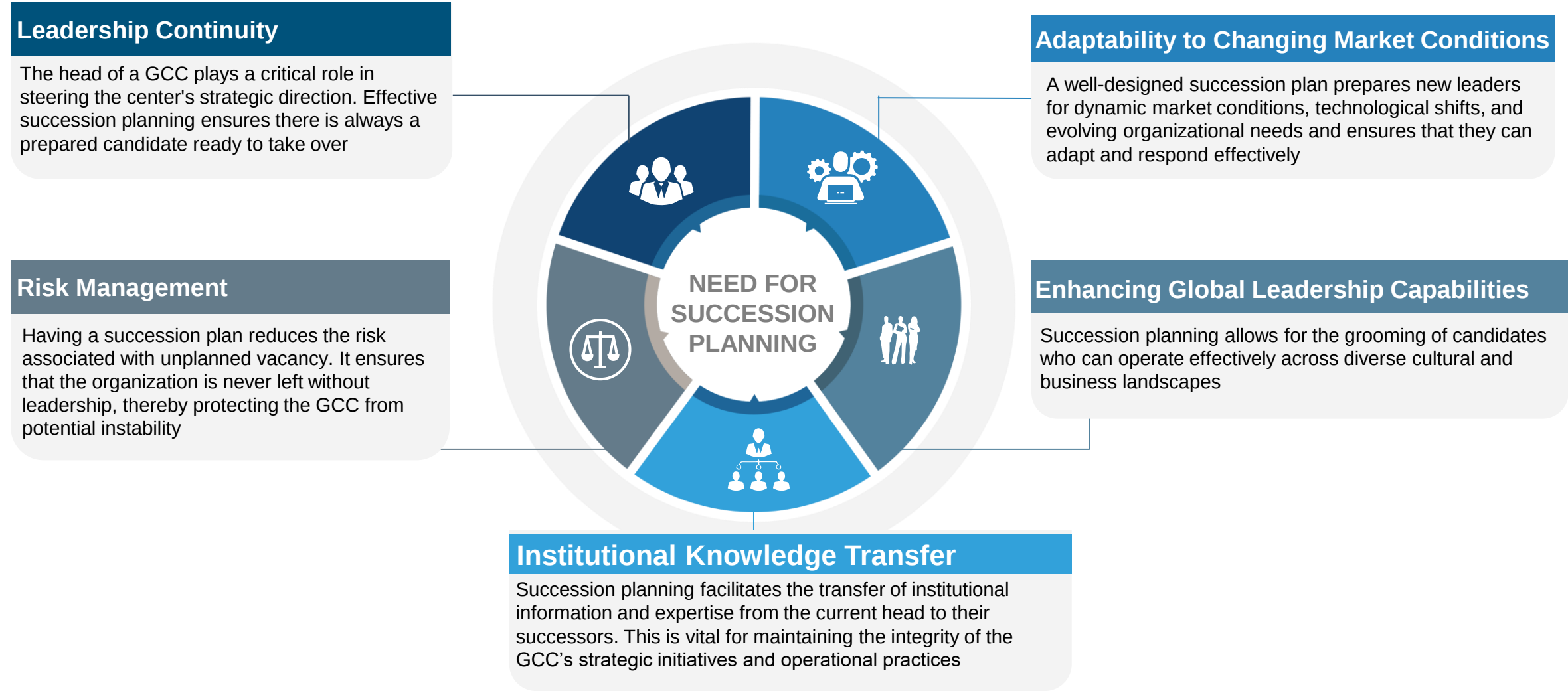
Attending global leadership conferences

Collaboration with HQ and global leadership teams is the top method for gaining global exposure among Current GCC Heads, followed by attending global conferences



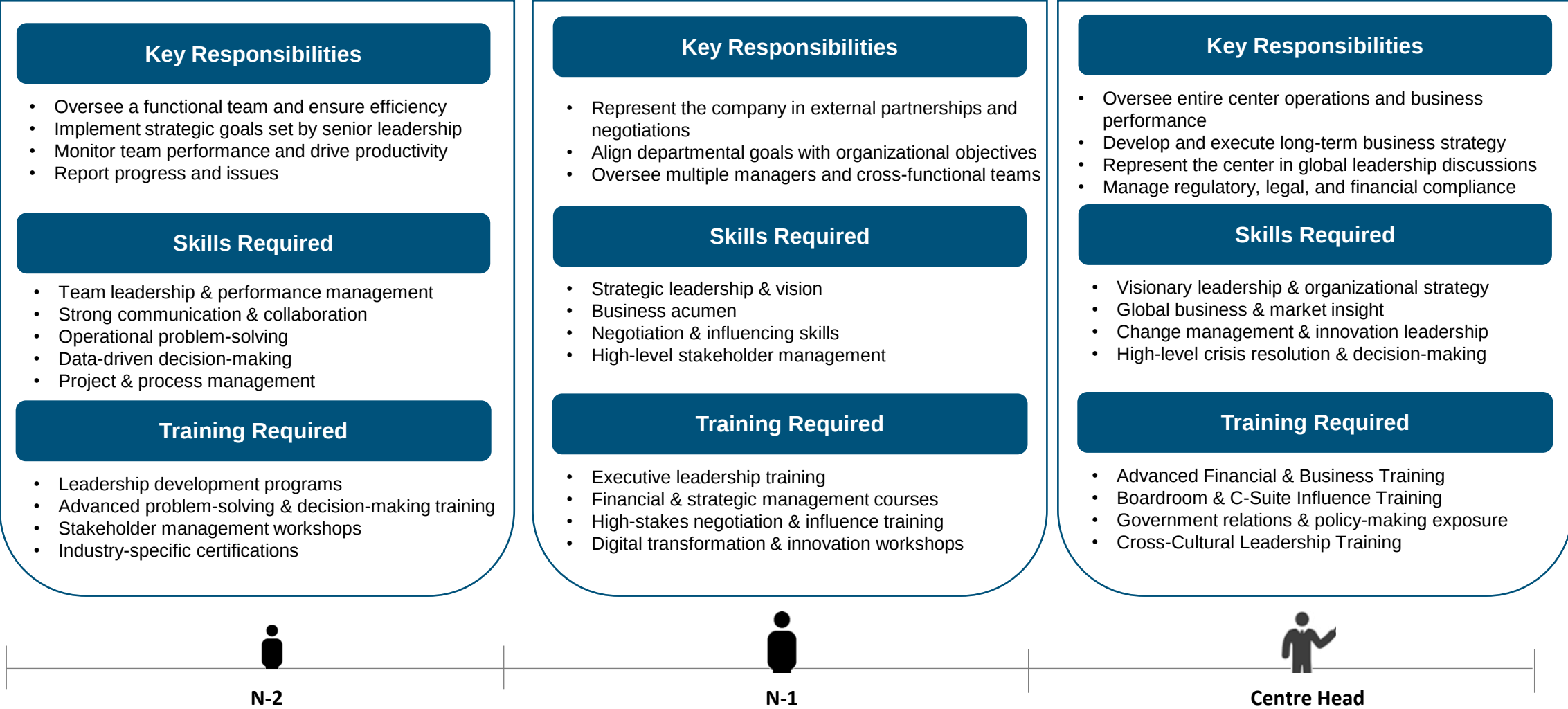


A structured succession program is essential for every GCC as it provides ample time to develop and groom future leaders, ensuring seamless leadership continuity and long-term stability

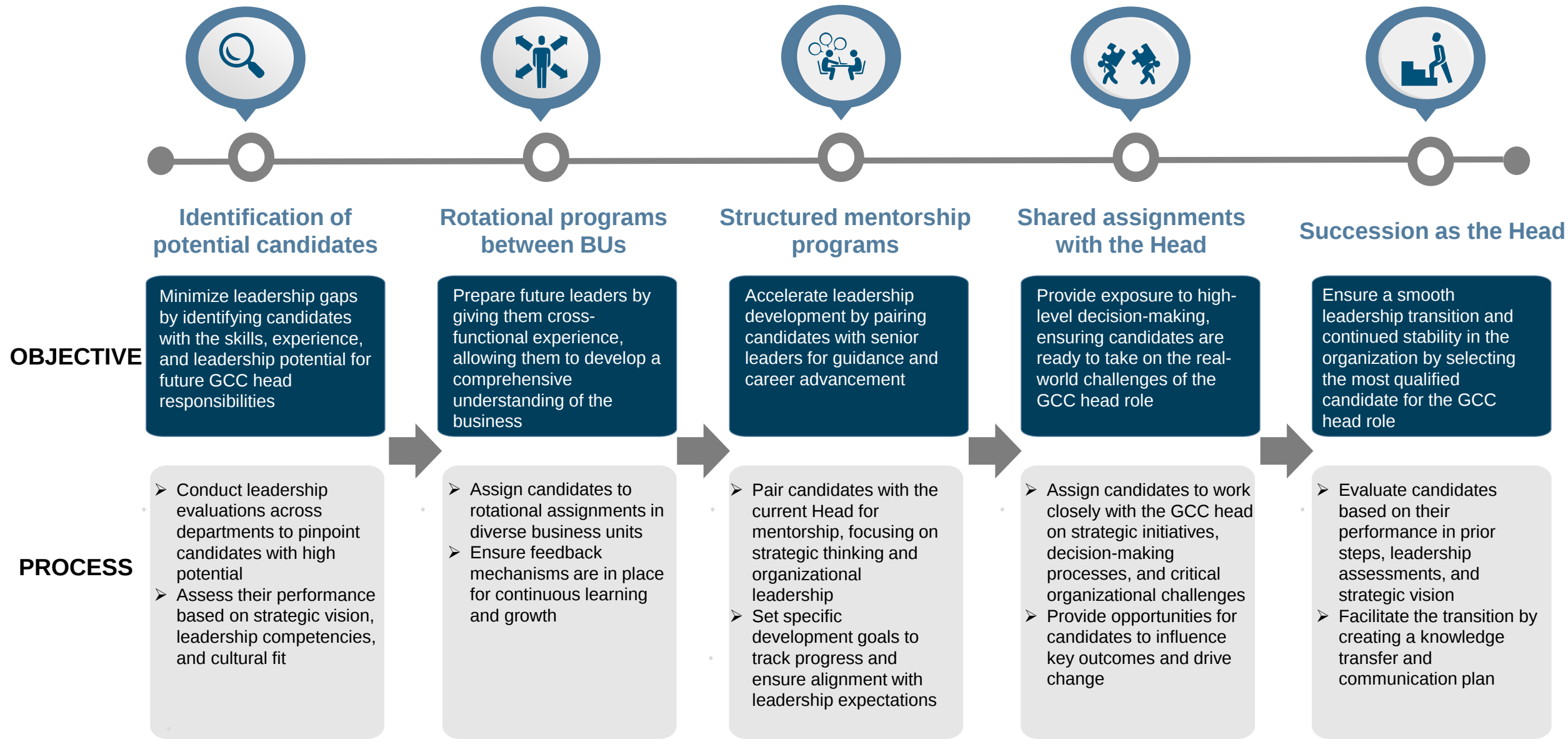


While building a strong succession pipeline is critical for every GCC, the challenges to build such a pipeline vary at each stage of maturity





While succession plans for leadership roles require structure, the Center Head position demands an even more rigorous process to prepare "N-1" level employees



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Adaptive mindset	Ability to adjust to changing environments, embrace new challenges, and continuously learn.
BU	A division within a company focused on a specific market, product, or service.
Business Acumen	Knowledge and insight into business operations, financials, and strategic decision-making.
Crisis management	Skills and processes for handling unexpected disruptive events effectively.
Cross-functional synergy	Ability to Collaborate across departments to achieve better outcomes and innovation.
Digital and Data fluency skills	Proficiency in understanding, interpreting, and utilizing digital tools and data.
Emotional Intelligence	The ability of a GCC Head to lead with empathy, cultural sensitivity, and self-awareness in a high-stakes, globally integrated environment.
GCC	GCCs are the captive/capability units that include MNC (headquartered outside India)-owned units undertaking work for the parent's global operations.
GCC Headcount	Total number of employees working within Global Capability Centers in India
GCC Units	The number of distinct Global Capability Center offices or delivery locations established by multinational corporations across India
Geopolitical awareness	Leadership foresight into global regulatory, economic, and political shifts that could impact GCC operations, talent mobility, or service delivery continuity
Global exposure	Direct experience in working with or leading cross-border teams and initiatives

Global Roles	Global Roles within GCCs entail responsibilities that span multiple regions or countries, rather than being confined to a specific geography. These positions require individuals to take ownership of the design, strategy, and outcomes for teams and stakeholders across various geographies. In addition to overseeing global charters and teams, global leaders often also have P&L (Profit and Loss) responsibilities. These roles can be focused on R&D, engineering, or other functional areas.
Innovation And Digital Transformation	Ability to Implement new technologies and approaches to drive efficiency and business evolution.
N-1	Senior leadership level directly reporting to the Head.
N-2	Next-tier leadership level reporting to N-1 executives.
Negotiation Skills	The ability to reach agreements through discussion and compromise.
People Leadership And Team Building	The ability to inspire, develop, and align teams toward common goals.
Resilience	The ability to recover quickly from setbacks and maintain performance under stress.
Span Of Control	The number of direct reports the Center Head is responsible for.
Stakeholder Management	Ability to Build and maintaining productive relationships with internal and external stakeholders.
Strategic Vision And Long-term Planning	Ability to set future goals and map out sustainable paths to achieve them.
Succession Planning	The practice of Identifying and developing future leaders to ensure business continuity.
Sustainability And ESG Integration Skills	The ability to Incorporate environmental, social, and governance principles into business practices.

KEY CONTRIBUTORS



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Consultant



Shrey Gulyani
Consultant



T R A N S F O R M • I N N O V A T E • C O L L A B O R A T E