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THE GCC VALUE ORBIT

From Delivery Engine to Enterprise Nerve Centre

May 2026

Foreword

India's Global Capability Centers (GCCs) expansion journey continues at a rapid pace, with over 500 new GCCs and 1,000+ units established in the past 5 years. However, the journey has now reached a definitive inflection point: what began as a pursuit of cost arbitrage and operational support has evolved into a sophisticated orchestration engine, with Indian GCCs increasingly positioned as primary architects of enterprise strategy.

In FY26, the narrative extends beyond scale to innovation and value creation. This year's study highlights how GCCs are leveraging AI to move past task automation towards intelligent, self-optimising business processes. In doing so, they are redefining their value proposition and transforming from execution to ownership hubs.

Powered by an AI-ready workforce and the shift from offshoring to global capability ownership, the landscape continues to accelerate. Workforce remains India's greatest strength, but the focus is shifting from traditional skill sets to domain and technology expertise – professionals who are not just AI-literate but adept at driving human-machine collaboration. At the same time, GCCs are emerging as ecosystem orchestrators, taking a central role in AI transformation, resetting

traditional relationships and building multi layer partnerships across academia, startups, skilling platforms and industry bodies to scale innovation.

India's GCC advantage is anchored in talent, vibrant tech ecosystem, location, and policy. Two thirds of new GCCs in the past two years have primarily chosen Tier I cities, while emerging hubs are fast gaining traction. Flexible entry models are enabling faster setup, with central reforms and state-level incentives strengthening the ease of doing business. Together, these factors are positioning India as the premier destination for the next wave of GCCs.

This report serves as a roadmap for that transformation. It reflects our collective commitment to building a resilient, future-ready ecosystem that anchors the global technology sector. The outlook is clear: the centers of the future will be defined by their ability to lead through complexity and turn global challenges into growth opportunities.

We invite you to explore these insights as we collectively witness the next wave of transformation take shape.

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INDIA GCC LANDSCAPE

Offshoring base to AI-powered
strategic hub



Ecosystem powered by AI-ready workforce, cost advantage and global capability ownership

GCC overview (FY26E)

2,117 GCCs	3,728 GCC units
506 G2000 GCCs	504 PE- backed/acquired GCCs
423 GCCs below USD100 mn*	583 Mid-market GCCs
USD 98.4 bn GCC revenue	2.36 mn Installed GCC talent



GCC overview (FY21-26E)

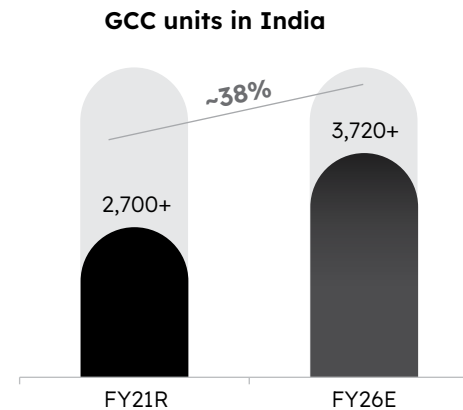
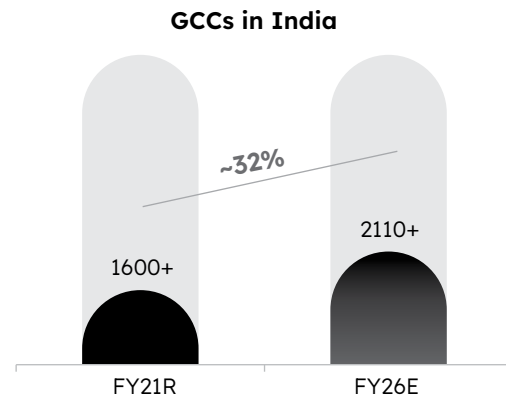
510 GCCs	1025 GCC units
89 G2000 GCCs	158 PE- backed/acquired GCCs
130 GCCs below USD 100 mn*	149 Mid-market GCCs
~9.9% GCC revenue CAGR (FY21-FY26E)	~6.2% GCC talent CAGR (FY21-FY26E)

Source: Zinnov, PrivateCircle, ROC, EPFO, Wizmatic, Nasscom

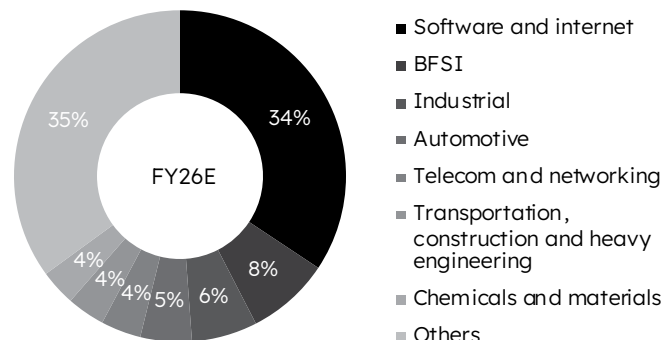
*Enterprise Revenues, Mid-market GCCs refers to GCCs established by mid-sized enterprises with annual global revenues between USD 100 mn to USD 1 bn

India powers global GCC expansion by adding 500+ GCCs and 1000+ units in the past five years

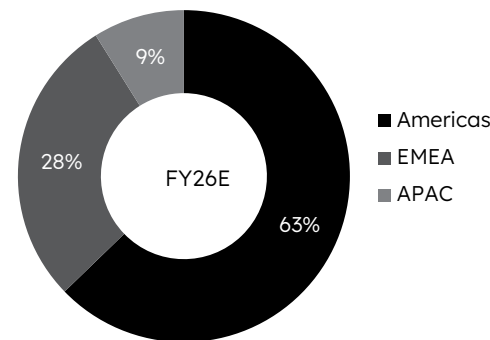
GCC and GCC units in India (FY21-26)



GCCs in India by Sector



GCCs in India by HQ Region



Key insights

- ❄ The Americas continue to dominate India's GCC landscape, accounting for nearly two-thirds of new setups, driven primarily by US-headquartered enterprises
- ❄ Of the 500+ PE-backed/acquired GCCs in India, ~32% have been established in the past five years, reflecting strong investor confidence in the model's scalability and strategic importance
- ❄ EMEA is significantly underpenetrated relative to its corporate base, particularly in industrials, automotive and BFSI, making it the most attractive near-term target for India's GCC ecosystem
- ❄ The next wave of high-value, large-scale GCC growth is disproportionately driven by heavy-asset verticals that only establish centers once they hit massive global revenue thresholds

Source: Zinnov GCC Research and Analysis FY21 - Data as of March 2021

FY26 - Data estimated as of March 2026

India powers global GCC expansion by adding over 100 new GCCs in FY26

Illustrative

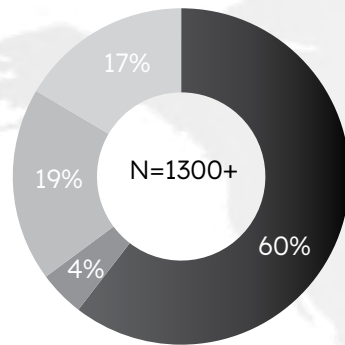


Source: Zinnov GCC Research and Analysis

Over 90% of India's GCCs are multifunctional but still anchored around one primary role

Distribution of GCCs in India based on Function, by Region FY26E

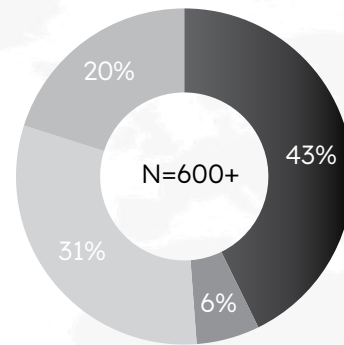
Americas



■ ER&D-led ■ IT-led ■ BPM-led ■ Distributed

- * Americas-origin GCCs, particularly in sectors such as semiconductors, telecom and networking, and aerospace and defence, account for a higher share of product and platform work
- * In the mid-market segment, ~66% of GCCs focus on product and platform engineering, reflecting a strong build-led mandate

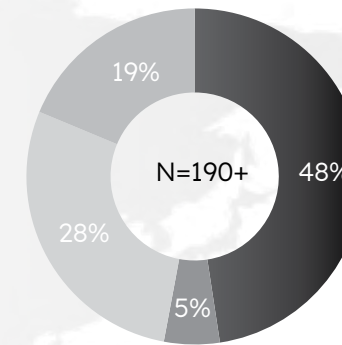
EMEA



■ ER&D-led ■ IT-led ■ BPM-led ■ Distributed

- * EMEA accounts for a higher share of BPM-focussed GCCs (~31%), largely driven by consumer, retail and industrial firms
- * Products- and platform-centric GCCs, are mostly concentrated in sectors such as automotive, semiconductors and industrials

APAC



■ ER&D-led ■ IT-led ■ BPM-led ■ Distributed

- * Large APAC enterprises continue to anchor BPM-centric GCCs
- * Mid-market APAC GCCs are predominantly product- and platform- centric , similar to GCCs from the Americas

Source: Zinnov GCC Research and Analysis

FY26E data estimated as of March 2026

GCCs are classified as ER&D-led, IT-led, or BPM-led based on the dominant function within their India workforce. A GCC is categorized under a specific archetype if more than 45% of its total India headcount is concentrated in that function.

For example, if over 45% of a GCC's India-based workforce is engaged in ER&D activities, the GCC is classified as ER&D-led.

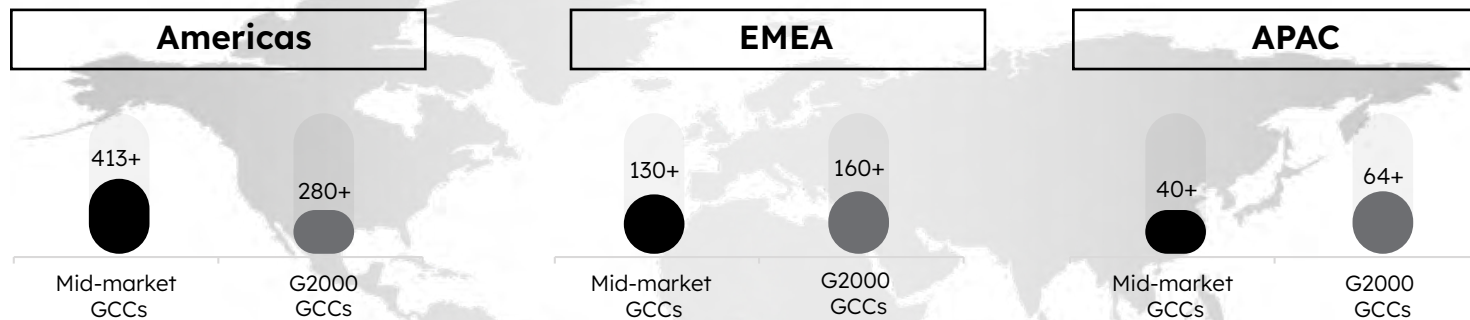
Americas lead GCC expansion in India, while EMEA and APAC present significant growth potential

>32% Mid-market GCC presence in India



>25% have GCC presence in India

Mid-market and G2000 GCCs by region (FY26E)



Top 5 countries	GCCs (FY26E)
USA	1290+
Germany	105+
Japan	75+
Canada	40+
Australia	25+

Top 5 emerging countries	GCCs (FY26E)
UAE	22+
Denmark	19+
Belgium	16+
Luxembourg	9+
Taiwan	8+

Source: Zinnov GCC Research and Analysis

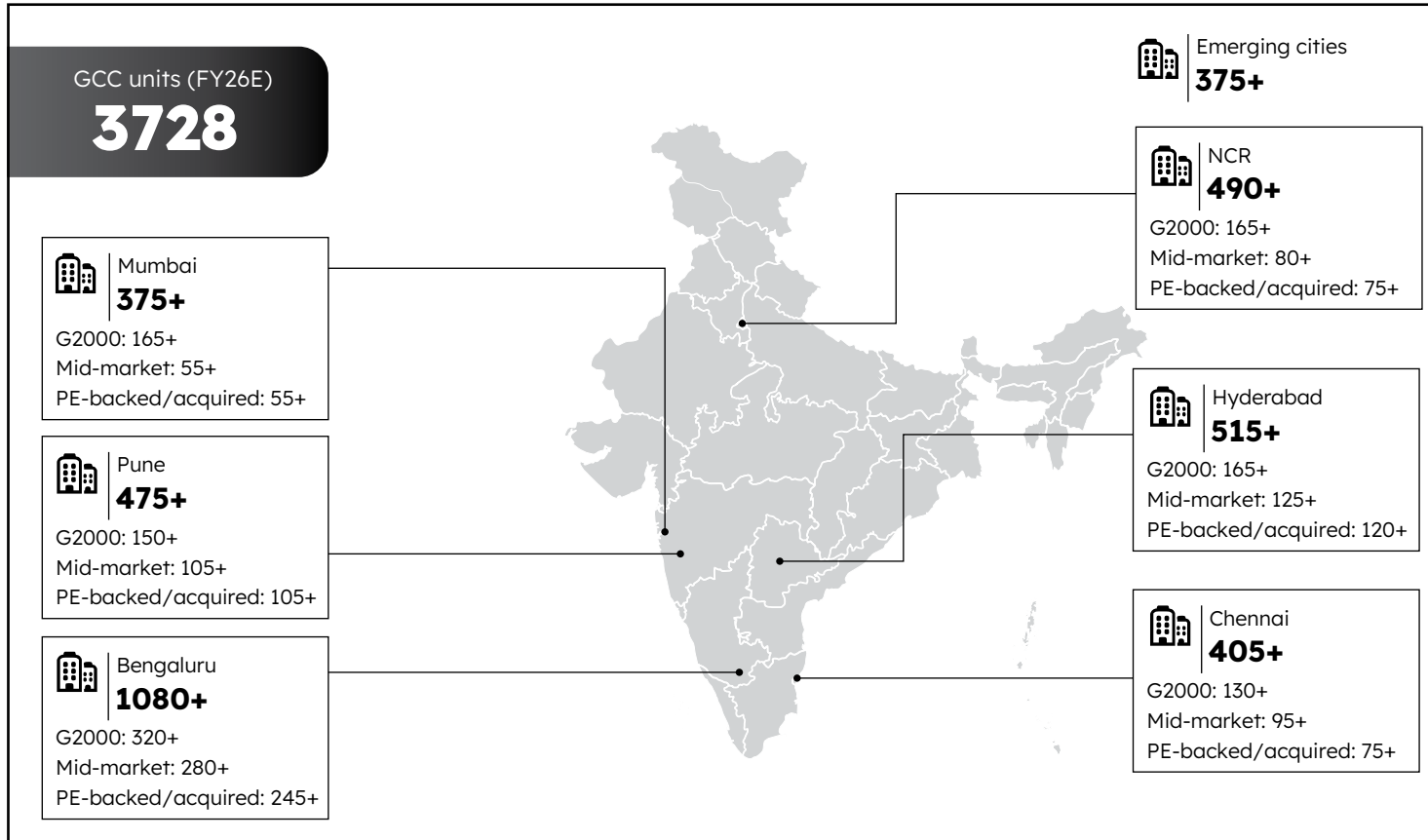
FY26 - Data estimated as of March 2026

Key insights

- ❄ Broad-based GCC growth spans G2000 and mid-market enterprises ~18% of the 506 G2000 companies with GCCs in India have set them up in the past 5 years, reiterating India's importance as a strategic global hub
- ❄ APAC firms typically start small and scale over time; their strong mid-market representation indicates a steady, long-term growth opportunity for India GCC
- ❄ Countries like Canada and Germany are gaining market share, reflecting an increase in geographically distributed sourcing. Other European countries make up ~19% of EMEA GCCs in India, indicating expansion beyond large and established markets

Two-thirds of new GCCs choose Bengaluru and Hyderabad, with talent as the top attraction

GCC units across Tier-I locations in India



Key insights

- Hyderabad has emerged as the preferred destination for new BFSI GCCs units with 50% of new entrants in the last year, driven by its deep financial services talent pool.
- As of FY26, Bengaluru continues to lead India's GCC landscape, accounting for over 29% of the country's 3,720+ GCC units and more than one-third of its installed GCC talent.
- ~5% of India's GCC units set up over the last one year have been established in emerging cities signaling a gradual shift beyond metros.
- GCCs account for a ~40% share of India's office space leasing over the last decade, highlighting a robust, multi-year structural trend rather than a temporary cyclical spike in demand

Top five emerging GCC locations - Illustrative

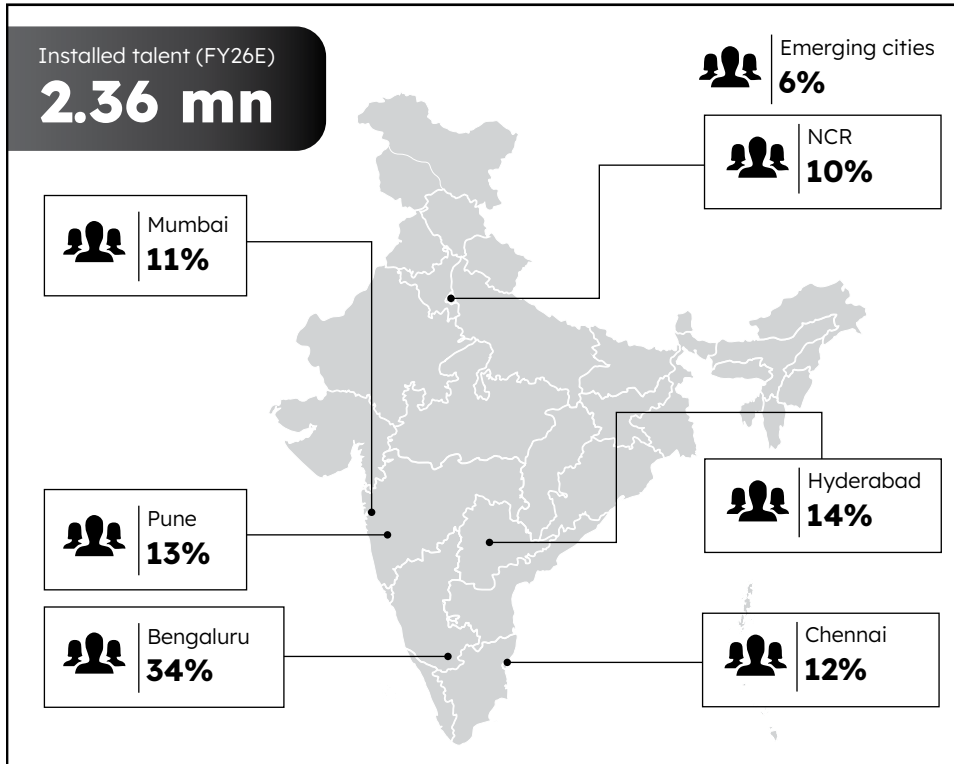
City	GCC Units FY26E	Key GCCs
Coimbatore	60+	amazon, Bosch Global Software Technologies, COLRUYTGROUP
Ahmedabad	45+	S&P Global, Bank of America, cadence
Kolkata	45+	SIEMENS, Honeywell, PHILIPS
Vadodara	35+	Hitachi Energy, Nielsen, Mastercard
Kochi	35+	LuLu, Amphenol, Baker Hughes

Source: Zinnov GCC Research and Analysis

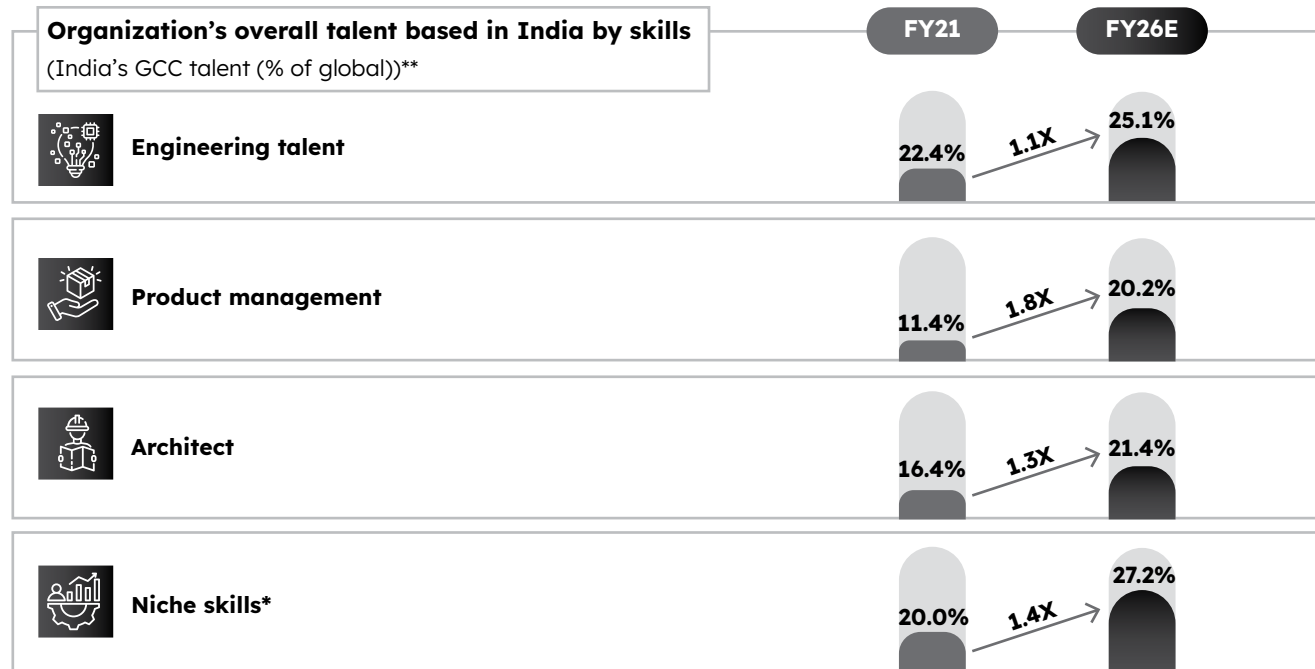
FY26 - Data as of March 2026

Indian GCCs shift from scaling to transformation, driven by complexity, scope and AI-first capabilities

Installed GCC talent across Tier-I locations in India



Evolution of core engineering and leadership work

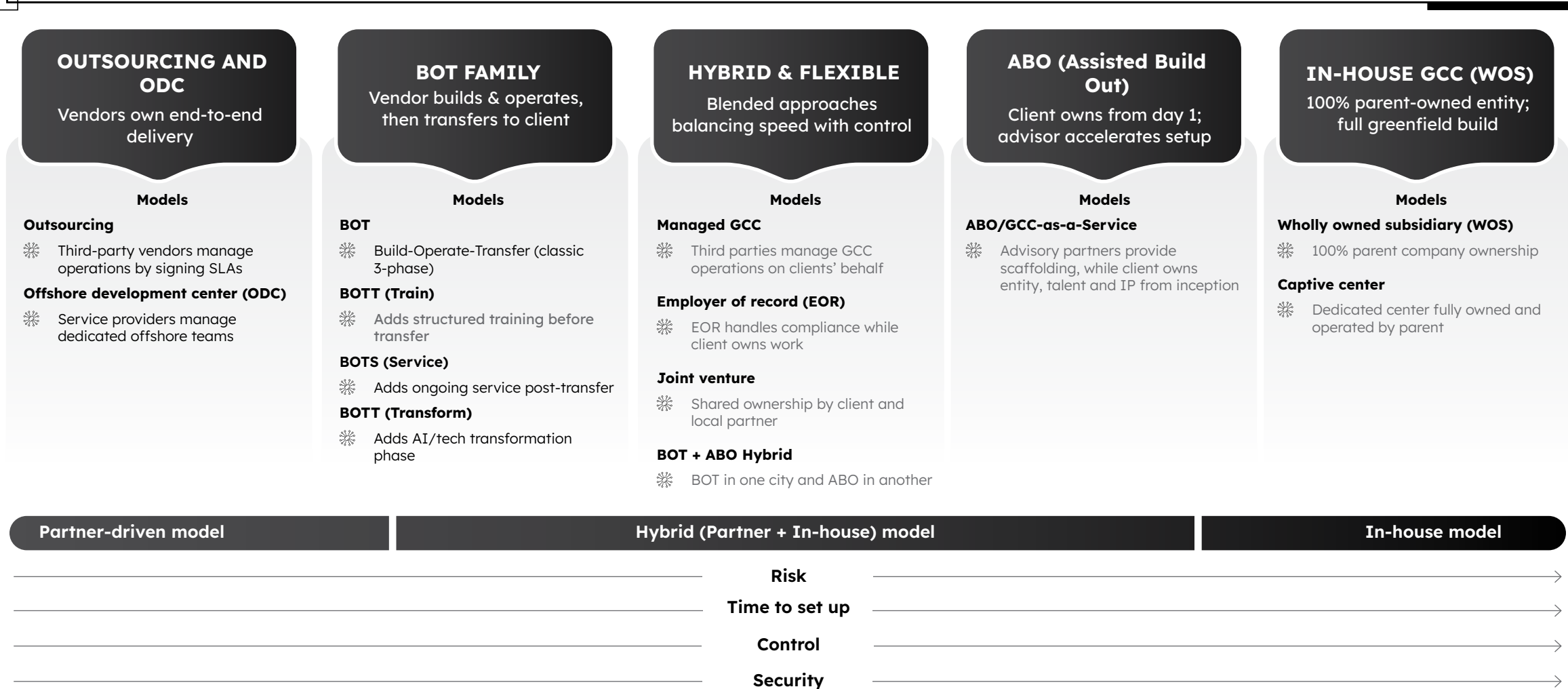


*Niche Skills include Blockchain, AI/ML, Cloud, IoT, RPA, Cybersecurity, Big Data Analytics, AR/VR etc.
 **The percentages reflect the growth of the talent pool in India GCCs. For example, '25.1%' indicates that 25.1% of the organization's overall engineering talent is based in India in FY26E

- ✿ AI Talent now makes up ~28% of the global GCC pool, making India the largest hub outside the US
- ✿ About 31% of niche skills professionals in Indian GCCs have 6+ years of tenure, showing deep experience

Source: Zinnov GCC Research and Analysis

Multiple models enabling faster and more flexible market entry, accelerating GCC setup in India



Source: Zinnov GCC Research and Analysis

Union and state governments fuel GCC growth through reforms in transfer pricing and ease of doing business

Union Budget 2026: Strengthening GCC economics through regulatory and tax simplification

<p>IT services consolidation under Safe Harbour Regime (SHR)</p> <p>01</p> <p>✿ Reducing classification ambiguity resulting in faster management of dispute and litigation</p>	<p>Tax relief for IT services under SHR</p> <p>02</p> <p>✿ A unified Safe Harbour margin of 15.5% replacing the earlier range of 17-24%, reducing tax burden while enhancing certainty and ease of doing business for GCCs</p>	<p>Safe Harbour threshold enhancement</p> <p>03</p> <p>✿ The Safe Harbour turnover threshold enhanced from approximately USD 30mn to 200mn*, with automated approvals that are valid for five years</p>	<p>Unilateral APA fast-tracking</p> <p>04</p> <p>✿ Unilateral Advanced Pricing Agreement (APA) processes fast-tracked with a completion timeline of two years (extendable by six months on taxpayer's request)</p>
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Illustrative

State level incentives that provide baseline benefits that differ mainly in cap and tenure

CAPEX subsidy	R&D subsidy	Stamp duty exemption	Quality certification reimbursement
Intellectual property reimbursement	Rent and lease assistance reimbursement	Power/electricity subsidy	Employment/skill development subsidy

*Standard conversion rate applied, figures are rounded

Source: Zinnov GCC Research and Analysis

The four shifts defining India GCCs in FY2026

From capability to value

01

- ✿ **46%** of GCCs now operate at Portfolio or Transformation hub maturity, up from 42% in FY21
- ✿ **27%** of new GCCs reach Portfolio stage within 5 years - a journey that historically took 10
- ✿ **64%** of site leaders hold a dual mandate, bridging global BU ownership with site leadership

The maturity scorecard has been rewritten - GCCs are now measured on outcomes delivered, not processes owned.

Workforce and workplace, redesigned together

03

- ✿ 28% drop in GCC hiring volumes from H1 to H2 FY26 as redeployment and AI-supported capability building displace recruitment
- ✿ Technical skill half-life collapsing from 10 years to 2-5 years; continuous learning is now a design principle
- ✿ GCC real-estate runway expanding from 263mn+ to 350mn+ sq ft; 85% targeting carbon neutrality by 2030

The operating model of work is being rebuilt - fewer people, smarter space, and a hospitality-grade experience standard

India is building AI, not just deploying it

02

- ✿ **1,200+** India GCCs have AI/ML capabilities; 250+ run dedicated AI/ML Centers of Excellence (CoE)
- ✿ **250K+** AI/ML professionals - ~28% of global GCC AI talent, second only to the United States
- ✿ **#1** AI hiring intensity among GCC markets globally; leads GenAI-specific hiring worldwide

India anchors the application and engineering layers of the global AI stack - the next frontier is model research and infrastructure.

Value comes from what you orchestrate, not own

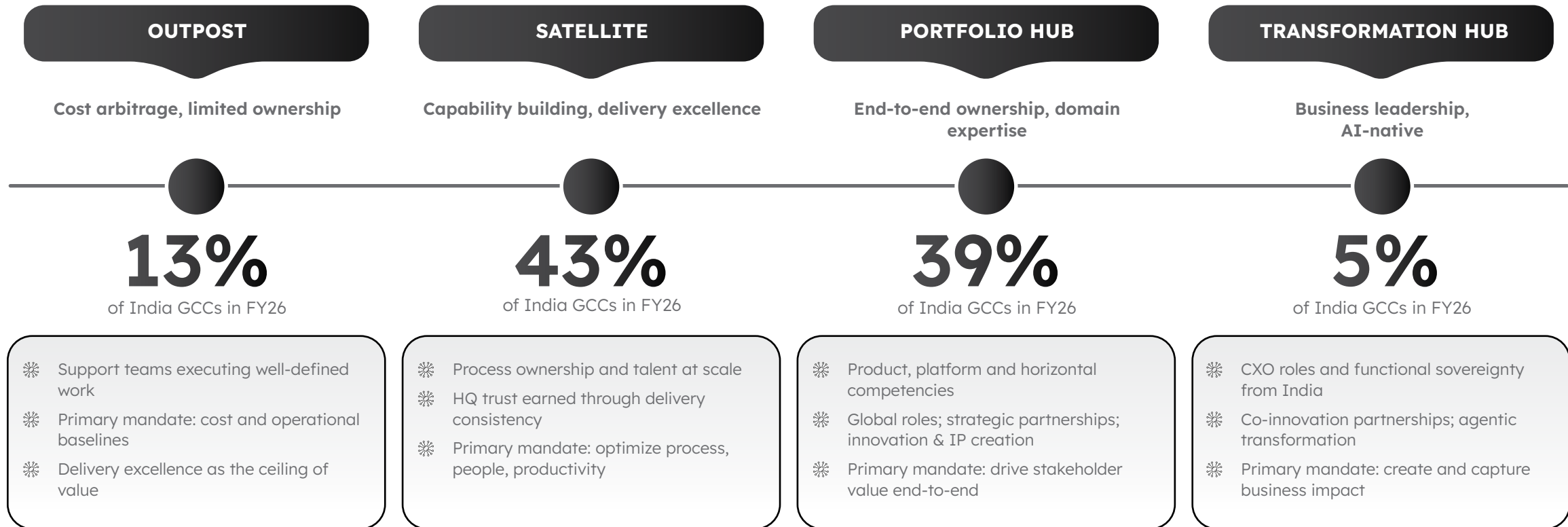
04

- ✿ 90-95% of GCCs partner with universities; 80-85% with skilling platforms; 50-55% co-innovate with startups
- ✿ Four new GCC-Service Provider partnership models emerging: BOTT, Embedded Pods, Co-Innovation, Value-based Managed Services
- ✿ Shift from FTE to outcomes - commercial contracts move from time-and-materials to value-share and gain-share

The ecosystem of academia, startups, skilling, and industry bodies is the next multiplier of GCC value creation

Theme 1 | The enterprise impact imperative - from capability-centric to value-driven

India GCCs anchor the application and engineering layers of the global AI stack, with deep talent, rapid operating-model evolution, and early signs of foundational R&D



New GCCs are no longer starting at Outpost — 96% of post-FY21 entrants arrive with a product/portfolio mandate, and 49% are AI-first from day one

Theme 2 | Building AI for the world - India as the global builder, not just the deployer

India GCCs anchor the application and engineering layers of the global AI stack; research, infrastructure, and energy remain the frontier

AI X GCC BY THE NUMBERS

1,200+

India GCCs with AI/ML capabilities

250+

dedicated AI/ML Centers of Excellence

250K+

AI/ML professionals in India GCCs

#1

AI hiring intensity among GCC markets globally

TALENT SCALE

India is the 2nd-largest employer of enterprise AI talent globally

- * ~28% of the global GCC AI talent pool, second only to the United States
- * AI hiring in India rose significantly in H2 FY25, growing faster than the US
- * Senior AI talent intensity is ~19% (vs ~33% for product roles); capability is concentrated in junior and middle layers

CAPABILITY STACK

Strong in applications and chip design; infrastructure and energy lag

- * High capability: applications, model engineering, chips
- * Medium capability: model research, being anchored by a select set of product and platform companies
- * Low capability: infrastructure, energy,, where India significantly lags global peers

OPERATING MODEL

Becoming AI-native is an operating-model challenge, not a technology one

- * GCC adoption of a hybrid AI operating model grew from 35% to 70% in six months (Aug'25 to Feb'26)
- * 0% GCCs are AI-native yet; only 13% play a role beyond execution in enterprise AI strategy
- * AI talent is deputed to business units and domain talent is rotating into AI CoEs

Theme 3 | The new work blueprint — workforce and workplace, redesigned as one system

THE WORK REDESIGN IN NUMBERS

73%

CHROs say AI disruption is outpacing workforce readiness

10 → 2-5 years

collapse in technical skill half-life

263+ → 350 +mn

projected sq ft of GCC real estate over next 3-4 years

HIRING MODEL

Redeployment is replacing recruitment

- ✿ Hiring slowdown spans all seniority levels; several GCCs have paused junior recruitment
- ✿ AI-focused skillsets rose 1.5pp as a share of open roles in the last 6 months; non-AI hiring shrunk
- ✿ Backfilling requirements using existing talent, supported by AI tools, is the new default

SKILLS & CULTURE

A future-ready workforce is shaped by right skills, right agility, right culture

- ✿ Specific frameworks in, generic labels out: Docker (+27pp), RAG (+14pp), Scikit-Learn (+17pp), PyTorch (+14pp)
- ✿ ~60% of workers will need reskilling by 2030; ~18% may not receive training
- ✿ Mature GCCs are moving beyond generic training to targeted, role-specific, domain-integrated learning

WORKPLACE AS A STRATEGIC LEVER

Rests on three choices: portfolio, experience, infrastructure

- ✿ 47% of employee time is individual focus work; 60% prefer hospitality-driven workspaces
- ✿ 85% of GCCs pursuing carbon neutrality by 2030; LEED, IGBC, WELL certifications are now baseline
- ✿ 40% of India's office leasing over the last decade came from GCCs, not a cyclical absorption spike

Theme 4 | The ecosystem orchestrator - value from what you orchestrate, not what you own

GCCs orchestrate partners across two fronts — optimizing traditional workloads with AI, and accelerating AI-led innovation at scale

OPTIMIZE 'CONTEXT'

Augment & optimize traditional workloads with AI

- ✿ AI-assisted engineering: copilots across SDLC for dev, test, maintenance
- ✿ AI-led business processes: HR, Finance, CX, IT Ops with AI-driven automation
- ✿ Infrastructure modernisation: cloud & legacy migration for AI-compatible environments

ACCELERATE 'CORE'

Support new AI-driven workloads & innovation

- ✿ Agentic process transformation: AI advisory, multi-agent workflow prototyping
- ✿ Verticalized AI solutions: domain-trained models, reusable components, MVPs
- ✿ AI-first talent & data readiness: upskilling programs, AI CoE setup, data foundations

THE FIVE ECOSYSTEM CHANNELS | Partnerships that make orchestration possible for leading GCCs

SERVICE PROVIDERS

4 models

BOTT, embedded pods, co-innovation, value-based managed services

ACADEMIA

90–95%

Curricula co-design, joint research, internships, hiring pipelines

STARTUPS

50–55%

PoCs & hackathons, co-innovation labs, startup studios, VC pipelines

SKILLING PLATFORMS

80–85%

Role-based pathways, certifications, hands-on labs, internal academies

INDUSTRY BODIES

25–30%

Standards collaboration, advisory boards, thought leadership

The way forward | ~75% of India GCCs can reach portfolio or transformation status by FY2030

Strategic Imperatives for GCC Reinvention

Expertise over scale

Pivot from talent volume to **expertise density**. Focus on lean, leadership-heavy teams that own strategic decision-making rather than execution alone.

The innovation engine

Shift from an offshore node to the **locus of enterprise** architecture. Own global platforms, product standards, and enterprise-wide AI governance.

Resetting the value prop

Counter AI-driven cost erosion by prioritizing **speed of innovation** and human-centric talent models as the new cornerstone of ROI.



Appendix

Definitions

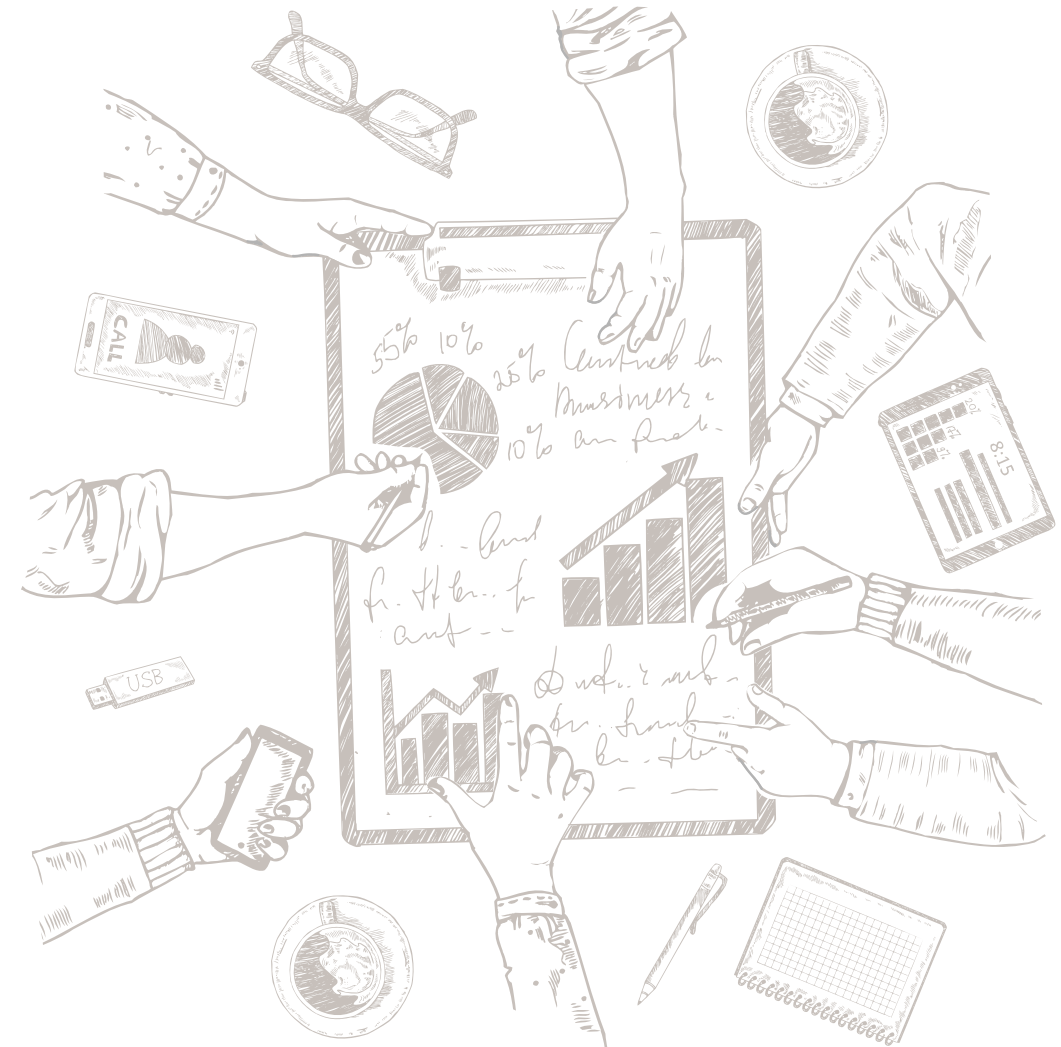
Definitions

Global Capability Center (GCC)

- ✦ Offshore units established by Multinational Corporations (MNCs) to perform strategic functions for the parent enterprise, leveraging India’s knowledge-based talent, cost, and operational efficiencies
- ✦ Encompasses Technology, Engineering, and Operations functions, including Shared Services Centers of MNCs in India
- ✦ Operates as a wholly-owned in-house entity of the parent MNC, with the parent headquartered outside India and India serving as a delivery/capability hub

Enterprises Not Qualifying as a GCC

- ✦ Service Providers (SPs) and Integrators — Technology, Engineering, Operations, or Digital services firms; integrators supporting Product/Solution/Platform development
- ✦ Professional Services firms with a dual model — Firms operating both an in-house and a third-party services business, where in-house vs. external delivery cannot be cleanly separated
- ✦ Staffing companies generating revenue by outsourcing talent or providing contingency staff
- ✦ Pure-play Sales Entities selling products or customized tools/software into India and nearby regions
- ✦ India-origin companies operating on a dual-HQ model — Where the India entity performs strategic functions beyond technology, leadership operates across geographies, and the company does not function as a true offshore unit of a foreign-headquartered parent



Research Methodology

This report is co-developed by nasscom and Zinnov through an intensive, multi-layered research program - combining proprietary data, deep primary engagement, and expert networks to map the Indian GCC ecosystem with the depth it demands.

Primary Research

CXO & Leader Interviews

200+ one-on-one conversations with India GCC heads, CTOs, CHROs, and functional leaders across industries

Customer Conversations

Ongoing engagement with GCC leaders throughout the year – not point-in-time, but continuous pulse-checks

Case Study Deep-Dives

Structured case studies built from direct client engagements – each reviewed and approved by the GCC

Roundtables & Forums

6+ curated roundtables bringing together ecosystem leaders for structured dialogue on AI, talent, and partnerships

SME & Advisor Network

50+ industry veterans, advisors, and partners contributing practitioner-level perspective and validation

Ecosystem Immersion

On-ground presence at industry events, startup ecosystems, university partnerships, and policy forums

Secondary Research & Data Sources

Proprietary Databases

Zinnov and nasscom knowledge repositories, platforms like PrivateCircle, ROC, EPFO, Wizmatic, GCC tracking data, and benchmarking

Company & Analyst Reports

Annual reports, investor filings, analyst commentary, and news announcements

Expert Commentary

Published thought leadership, conference proceedings, and policy documents

What this report analyzes

India's potential as a global GCC hub that is consistently attractive for MNCs

The current scenario and emerging trends that define the Indian GCC ecosystem

The role played by enablers such as academia, start-ups, government policies, and service providers

Research process



Data discovery

Aggregate proprietary databases, identify key themes



Research

200+ interviews, roundtables, SME network engagement



Analysis

Cross-reference primary insights with secondary data



Outcomes

Validated findings, case studies, and actionable frameworks

Acknowledgement

We are grateful for the invaluable contributions of Nasscom’s Executive and GCC council members, industry leaders, and experts in shaping this report. We thank our member organisations for sharing data, case studies and perspectives on trends, and government bodies, academia, research and data partners for their continued support.

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LIST OF DEFINITIONS (1/5)

Acronym	Expansion
Agentic AI	AI systems capable of autonomously planning and executing multi-step tasks, taking decisions and actions with minimal intervention to achieve a defined goal
AI	AI here refers to Traditional AI (Descriptive, Diagnostic, Predictive and Prescriptive Analytics), Generative AI, and Agentic AI
AI Champion	An employee designated to advocate for and drive AI adoption within a business unit or function
AI-Native	A GCC state where AI drives enterprise innovation and the center owns outcomes, not just execution
Architect Intensity	The ratio of the number of architects in India to the total number of architects globally
BPM (Business Process Management)	A discipline that uses various methods to discover, model, analyze, measure, improve, and optimize business processes to coordinate the behavior of people, systems, information, and operations in support of business strategy. It includes HR Offshoring, Finance & Accounting, Procurement and Logistics, Marketing & Operations, Technical Support, and Knowledge-based Services.
BPM-led	A GCC where more than 45% of the total India headcount is concentrated in Business Process Management functions, such as finance and accounting, customer support, HR operations, and other business process services
CAGR	Compound annual growth rate, or CAGR, is the mean annual growth rate over a specified period of time, longer than one year.
CAGR (Compound Annual Growth Rate)	The mean annual growth rate of a metric over a specified period of time longer than one year, representing a smoothed rate of growth as if it had occurred at a steady pace each year.
Citizen AI	A concept where a non-technical employee uses low-code/no-code platforms and Generative AI to build applications, automate workflows, and analyze data without formal coding skills
CoE (Center of Excellence)	A specialized team within an organization dedicated to developing expertise in a specific field of technology, business, or government. A CoE is composed of subject matter experts and professionals with deep domain knowledge and aims to improve best practices, drive innovation, and facilitate collaboration across the organization.
Communities of Practice	Communities of Practice (CoPs) are organized groups of people with a common interest in a specific technical or business domain, collaborating to share information, improve their skills, and actively work on advancing their knowledge of the domain.

LIST OF DEFINITIONS (2/5)

Acronym	Expansion
Distributed	A GCC where no single function (ER&D, IT, or BPM) accounts for more than 45% of the total India headcount, indicating a balanced spread of capabilities across multiple functions
Domain Expertise	The depth of business, process and industry specific knowledge within the GCC's talent
Dual Mandate	A leadership model where a GCC site head also holds a global functional role (e.g., Global Engineering Head, Head of Innovation)
Edge Computing	Edge computing is a distributed computing model that brings computation and data storage closer to the sources of data - such as IoT devices, local servers, or edge gateways, rather than in a centralized cloud
Engineering	Engineering Services include any activity covering the development, augmentation, or optimization of an organization's products or services. It comprises support activities related to manufacturing, project engineering, MRO, and regulatory services, as well as Software Product Development, Embedded Services, and Mechanical Engineering Services.
Engineering Talent Intensity	The ratio of the number of engineering talent in India to the total number of engineering talent globally
ER&D-led	A GCC where more than 45% of the total India headcount is concentrated in Engineering R&D activities, such as product engineering, hardware/software design, and advanced research
Fine-Tuning	Model fine-tuning is the process of taking a pre-trained, general-purpose machine learning model (foundation model) and training it further on a smaller, specialized dataset to improve performance on a specific task
Forbes G2000	The Global 2000 is Forbes' annual list that ranks the largest companies worldwide by sales, profits, assets, and market value.
Forward Deployed Engineers	Forward Deployed Engineer (FDE) is a technical role that embeds directly with customers, often on-site, to deploy, customize, and integrate complex software or AI systems
GCC	Global Capability Centers (GCCs) are offshore services units established by Multinational Corporations (MNCs) to perform strategic functions, leveraging knowledge-based talent, cost and operational efficiencies. GCCs encompass the Technology, Engineering, and Operations functions, including Shared Services Centers of MNCs in India.
GCC Units	GCC Units refer to the total number of center locations operated by a parent organization across different cities in India. Each city-level presence is counted as a separate unit. For instance, if a GCC initially set up in Bangalore subsequently expands to Hyderabad, it is counted as 2 GCC units.

LIST OF DEFINITIONS (3/5)

Acronym	Expansion
GEO (Generative Engine Optimization)	Generative Engine Optimization is the practice of structuring online content to maximize visibility in AI-driven search results
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.
Global Roles	Global roles within GCCs entail responsibilities that span multiple regions or geographies and lead global charters and teams.
HITL (Human-in-the-loop)	Human-in-the-loop (HITL) machine learning is a collaborative approach that integrates human input and expertise into the lifecycle of machine learning (ML) and artificial intelligence systems
Hybrid AI Operating Model	A hybrid AI model combines an AI/ML Center of Excellence (CoE) – centralizing governance, standards, tooling and oversight, while distributing execution to AI practitioners embedded across business units - enabling domain-specific agility without sacrificing enterprise-wide consistency.
IT	IT Services refer to the application of business and technical expertise to enable organizations in the creation, management, and optimization of, or access to, information and business processes. It includes Application Development and Maintenance, IT Consulting, System Integration Services, and Infrastructure Management Services.
IT-led	A GCC where more than 45% of the total India headcount is concentrated in IT functions, such as application development, infrastructure management, and enterprise technology services
Market Size	Market Size in GCCs refers to the profitability generated by all GCC centers, calculated on the basis of resource utilization (productivity), billing rates, and the working hours invested by resources on an annual basis.
Mid-market GCCs	Mid-market GCCs refer to Capability Centers established by mid-sized enterprises with annual global revenues typically ranging between USD 100 Mn and USD 1 Bn. These centers focus on delivering high-value, specialized services while maintaining a leaner operational model compared to larger GCCs. There is no cut-off with respect to the date of inception of the GCC in India.
Model Drift	Model drift refers to the degradation of machine learning model performance due to changes in data or in the relationships between input and output variables, negatively impacting model performance, resulting in faulty decision-making and bad predictions

LIST OF DEFINITIONS (4/5)

Acronym	Expansion
Niche Skills	Specialized, high-demand technology capabilities such as Blockchain, AI/ML, Cloud, IoT, RPA, Cybersecurity, Big Data Analytics, and AR/VR that drive digital transformation and innovation
Niche Skills Intensity	The ratio of the number of niche skills talent in India to the total number of niche skills talent globally
Outpost	The center focuses on stability, governance, and cost efficiency, using basic automation and analytics. Work is execution-led, with limited decision-making rights. Vendor relationships are mostly transactional, focused on delivery and compliance. Customer centricity is reactive, with feedback loops still forming. AI is used mainly for basic reporting and automation. Value is steady and linear, built on consistency, quality, and savings.
PE-Backed GCCs	PE-backed / PE-owned GCCs refer to Capability Centers established by portfolio companies that are either backed or acquired by Private Equity firms, with a clear mandate of value creation within a defined hold period. These centers pull two levers simultaneously and at speed, experience enhancement and cost discipline, enabling faster setup and crisper decision-making than traditional GCC models.
Portfolio Hub	The center owns end-to-end products or services and is leaned on by Global in strategic decisions. AI becomes an integral part of BAU, embedded in decision-making, enabling smarter, data-driven operations. Teams have high customer centricity and are organized around customer journeys to deliver on needs and requirements. Vendor relationships evolve into strategic collaborations, co-developing new solutions. AI maturity strengthens through deployments and infrastructure readiness. Value comes from experience, agility, and growth, not just efficiency.
Product Management Intensity	The ratio of the number of product management professionals in India to the total number of product management professionals globally
RAG	Retrieval-Augmented Generation (RAG) is the process of optimizing the output of a large language model, so it references an authoritative knowledge base outside of its training data sources before generating a response.
Responsible AI	Steps taken to ensure the development and adoption of AI is safe, fair, transparent and reliable
Satellite	The center moves from delivery execution to owning defined modules with certain accountability. Foundational AI and Digital base supports workflows. Customer centricity improves through more responsiveness and attention to customer needs. Vendor management shifts toward outcome-based partnerships with shared goals. The center plans to build early AI capability, experimenting with pilots. Value grows from efficiency to effectiveness, with clearer links to business outcomes.

LIST OF DEFINITIONS (5/5)

Acronym	Expansion
Senior Talent Intensity	Is the proportion of Senior talent presence compared to the overall workforce
Techno-Functional Talent	Techno-functional talent bridges the gap between business needs and technical solutions, combining domain expertise with technical skills
Tier-I	Tier-I includes cities such as NCR, Mumbai, Pune, Bengaluru, Chennai, Hyderabad.
Tier-II & Tier-III/ Emerging Cities	Tier-II & Tier-III/Emerging Cities include locations such as Ahmedabad, Vadodara, Thiruvananthapuram, Chandigarh, Jaipur, Coimbatore, Kochi, Nagpur, Mysuru, Mangaluru, Madurai, Kanpur, Indore, Visakhapatnam, Goa, etc.
Transformation Hub	The center acts as a strategic orchestrator and an extended arm of HQ, shaping enterprise strategy, priorities, and innovation. It deeply understands customers, anticipating needs and driving co-created experiences. AI is built into how the GCC operates, shaping enterprise-wide improvements, elevating customer outcomes, and fueling new value avenues. Vendor ecosystems become innovation partners, including startups and global players. The center shows strong AI leadership, guiding responsible and large-scale AI transformation. It delivers exponential value through innovation, ecosystem collaboration, and enterprise-wide impact.

LIST OF ABBREVIATIONS (1/4)

Acronym	Expansion
ABO	Assisted Build Out
AI/ML	Artificial Intelligence / Machine Learning
APA	Advance Pricing Agreement
AR/VR	Augmented Reality / Virtual Reality
BAU	Business As Usual
BCP	Business Continuity Plan
BFSI	Banking, Financial Services and Insurance
BITS	Birla Institute of Technology and Science
BOT	Build-Operate-Transfer
BOTS	Build-Operate-Service-Transfer
BOTT	Build-Operate-Train-Transfer / Transform-Transfer
BPM	Business Process Management
BU	Business Unit
CAPEX	Capital Expenditure
CHRO	Chief Human Resources Officer

Acronym	Expansion
CI/CD	Continuous Integration / Continuous Deployment
CoE	Center of Excellence
CoP	Communities of Practice
CRE	Corporate Real Estate
CSA	Cloud Security Alliance
CX	Customer Experience
CXO	Chief 'X' Officer (executive leadership roles)
DSCI	Data Security Council of India
EDA	Electronic Design Automation
EoDB	Ease of Doing Business
EOR	Employer of Record
EPF	Employees' Provident Fund
ER&D	Engineering Research & Development
EV	Electric Vehicle
FMCG	Fast Moving Consumer Goods

LIST OF ABBREVIATIONS (2/4)

Acronym	Expansion
CI/CD	Continuous Integration / Continuous Deployment
CoE	Center of Excellence
CoP	Communities of Practice
CRE	Corporate Real Estate
CSA	Cloud Security Alliance
CX	Customer Experience
CXO	Chief 'X' Officer (executive leadership roles)
DSCI	Data Security Council of India
EDA	Electronic Design Automation
EoDB	Ease of Doing Business
EOR	Employer of Record
EPF	Employees' Provident Fund
ER&D	Engineering Research & Development
EV	Electric Vehicle
FMCG	Fast Moving Consumer Goods

Acronym	Expansion
IIIT	International Institute of Information Technology
IIM	Indian Institute of Management
IISc	Indian Institute of Science
IIT	Indian Institute of Technology
IoT	Internet of Things
IP	Intellectual Property
ISB	Indian School of Business
IT	Information Technology
ITeS	Information Technology enabled Services
JD	Job Description
KFON	Kerala Fibre Optic Network
KPI	Key Performance Indicator
KPO	Knowledge Process Outsourcing
L&D	Learning & Development
LEED	Leadership in Energy and Environmental Design

LIST OF ABBREVIATIONS (3/4)

Acronym	Expansion
LLM	Large Language Model
Mn	Million
MVP	Minimum Viable Product
NASSCOM	National Association of Software and Service Companies
NCR	National Capital Region
NGO	Non-Governmental Organization
NIRF	National Institutional Ranking Framework
NLP	Natural Language Processing
ODC	Offshore Development Center
OKR	Objectives and Key Results
OOP	Object-Oriented Programming
P&L	Profit and Loss
PE	Private Equity
PoC	Proof of Concept
pp	percentage points

Acronym	Expansion
PPP	Public-Private Partnership
R&D	Research & Development
RAG	Retrieval-Augmented Generation
RCM	Revenue Cycle Management
RPA	Robotic Process Automation
SBTi	Science Based Targets initiative
SDLC	Software Development Lifecycle
SGST	State Goods and Services Tax
SHR	Safe Harbour Regime
SLA	Service Level Agreement
SME	Subject Matter Expert
SOW	Statement of Work
SP	Service Provider
sq ft	square feet
TASK	Telangana Academy for Skill and Knowledge

LIST OF ABBREVIATIONS (4/4)

Acronym	Expansion
TPU	Tensor Processing Unit
USD	US Dollar
VC	Venture Capital
WOS	Wholly Owned Subsidiary
YOE	Years of Experience

About

nasscom

Nasscom represents the voice of India's \$300 bn+ technology industry, with a vision to establish the nation as the world's leading technology ecosystem. We boast a diverse and influential community of more than 3,500 member companies, spanning the entire spectrum of the industry - from DeepTech and AI start-ups to multinationals, from products to services, and from global capability centers to engineering firms.

Guided by our vision, our strategic imperatives are to accelerate skilling at scale to develop futureready talent, strengthen the innovation quotient across industry verticals, create new international and domestic market opportunities, drive policy advocacy to advance innovation and ease of doing business, and build the industry narrative with a focus on trust and innovation. In everything we do, we champion diversity and equal opportunity.

Nasscom Insights is the in-house research and analytics arm of Nasscom. We generate insights and drive thought leadership for business leaders and entrepreneurs, strengthening India's position as a hub for digital technology and innovation.

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About



Founded in 2002, Zinnov is a global consulting firm and a category leader in Global Capability Center (GCC) setup and implementation. With a presence across North America, Europe, and India, Zinnov has enabled 220+ GCC setups and supported the hiring of 250,000+ professionals for Fortune 2000 and mid-market enterprises globally. Zinnov partners with enterprises to build, run, operate, and transform GCCs end-to-end, integrating market entry, center setup, capability buildout, and talent scale-up into a single, outcome-driven model.

At the core is its Build-Run-Operate-Transform approach, powered by the proprietary GCC Accelerator Platform (GAP), enabling enterprises to accelerate time-to-value, improve operating performance, and turn GCCs into innovation-led growth engines.

Beyond GCCs, Zinnov drives value creation through deal advisory, commercial due diligence, M&A execution, market expansion, and digital transformation across AI/ML, intelligent automation, cloud, and IoT.

With deep expertise across Retail, Enterprise Software, BFSI, Healthcare, Automotive, and Telecom, Zinnov is the partner of choice for organizations looking to build and scale global capabilities with accountability and measurable impact.

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